

# HP Financial Planning & Analysis

for the Windows operating system

Software Version: 9.10

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## Installation and Configuration Guide

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Software Release Date: September 2010



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# 1 Getting Started

The Financial Planning & Analysis installation package guides the installation and configuration of all the components necessary to run the application successfully.

## Installation Prerequisites

There are requirements for drivers and external tools that the Financial Planning & Analysis application needs to run successfully. For example, you need a Java Runtime Environment (JRE), the right Microsoft SQL Server software and drivers, and a new (or existing) installation of SAP® BusinessObjects Enterprise XI 3.1 (BOE) to manage the data used by Financial Planning & Analysis. For more information about the environment requirements, read [Chapter 2, Requirements](#).

## Data Warehouse

The installation process builds a data warehouse, using your external RDBMS, that is the repository for key business data that is cleansed, consolidated, and organized to support efficient queries, reports, and to populate a variety of business analytics. The contents of the data warehouse depend on the external HP applications that generate business data. For example, the data may originate with an HP Financial applications such as Asset Manager, or HP Demand and Portfolio Management applications like Project and Portfolio Management.

The data warehouse consolidates the data from one or more of these external applications and makes it available for analysis by Financial Planning & Analysis.

## Distributed or Consolidated Environment?

You can consolidate all of the required components, such as the RDBMS, data warehouse, BOE, and Financial Planning & Analysis on a single server as shown in [Figure 2](#) on page 14. This configuration is useful for building prototypes and test environments.

For production, it is probable that you will need to deploy the components in a distributed environment. In that case, the metadata, staging, target, and ABC components can be configured in separate databases on separate servers.



To use a distributed environment successfully, your RDBMS must be Microsoft SQL Server.

This distributed environment might look different in different installations, depending on how you decide to deploy each component. For example:

**Case 1:** You could define one database for the metadata on one server, a separate database for staging on the same server, and merge the target and ABC areas into a single database on another server.

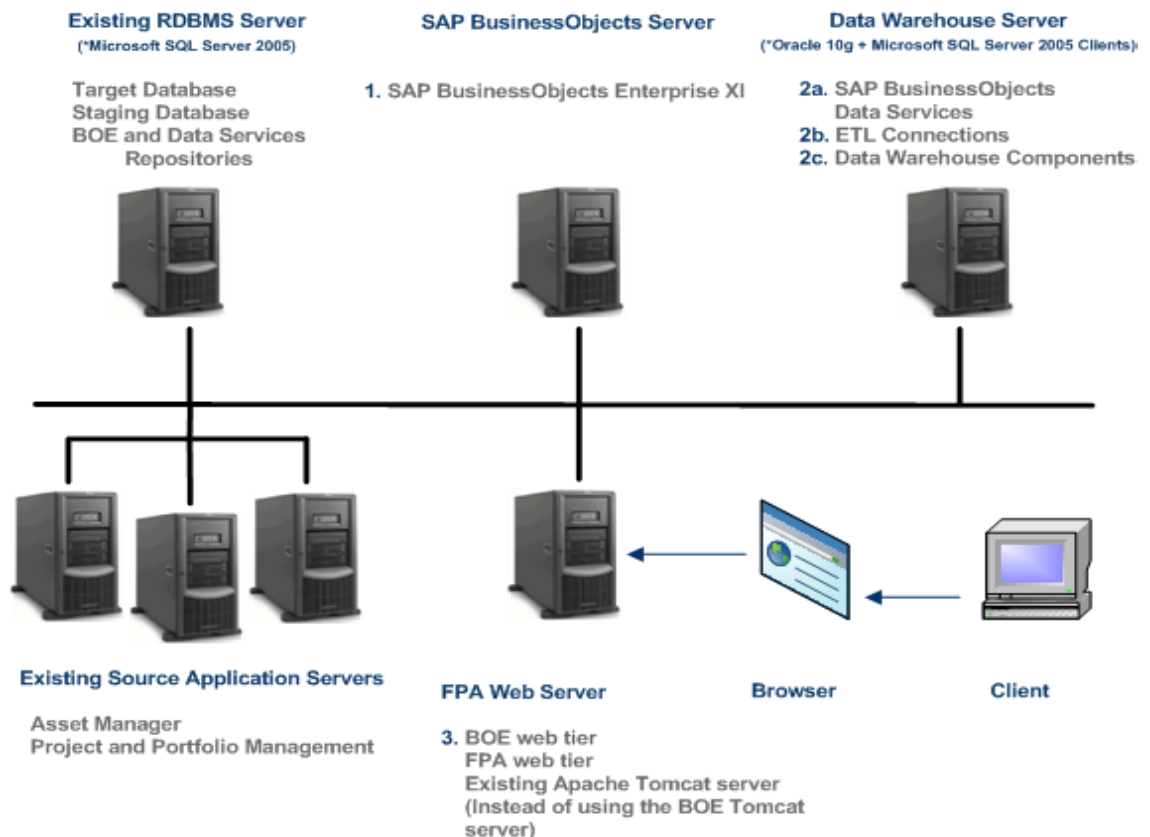
**Case 2:** You could define four separate databases on separate servers, one each for metadata, staging, target, and ABC.

## Distributed Server Environment

Most combinations of servers and deployment scenarios will work in a distributed environment. Although you can install all components on one server, the data warehouse typically runs in a distributed server environment. Data sources are usually on remote servers.

Before you begin the Financial Planning & Analysis installation process, verify that you have an existing RDBMS server running Microsoft SQL Server 2005, and that you have network connections to your remote data sources. [Figure 1](#) shows the recommended distributed configuration after you complete the Financial Planning & Analysis installation process.

**Figure 1 Distributed Server Environment**



## Supported Configuration Variations

If you already use BOE for other applications, or you have Apache Tomcat running on another server, you can eliminate the Financial Planning & Analysis web server by:

- Installing the Financial Planning & Analysis web application on the BOE server. See [Existing BOE Server](#).
- and
- Using the BOE-embedded instance of Tomcat to run the Financial Planning & Analysis web application. See [Existing BOE Server](#).

You can modify the Financial Planning & Analysis installation scenario to accommodate existing instances of BOE and Apache Tomcat.

### Existing BOE Server

You do not have to install a second instance that is dedicated to Financial Planning & Analysis. You can use an existing BOE installation on a separate server, but it must be version 3.1 and have the fix packs required by Financial Planning & Analysis.

- If this is the case, skip [Chapter 6, Installing SAP BusinessObjects Enterprise](#) and proceed to [Chapter 7, Installing the Data Warehouse Server](#).
- You can use the BOE Apache Tomcat server to run other web applications, such as BODS and Financial Planning & Analysis. It is not necessary to create multiple instances of Tomcat.
- After the installation is complete, make sure that you enable enterprise authentication on the existing BOE server. For more information, see [Chapter 9, Configuring User Roles and Authentication](#).

### Non-BOE Tomcat

You may have an existing instance of Apache Tomcat on another server that you want to use to deploy the Financial Planning & Analysis web application. You can use it instead of the BOE Tomcat if it meets the version requirements described in the HP Financial Planning & Analysis 9.10 Compatibility Matrix. For more information, see [Chapter 2, Requirements](#).

The [Appendix C, Installation Checklist](#) appendix prompts you to gather this information before you begin the installation process. When you complete the tasks in [Chapter 8, Installing the Web Application and Antivia XWIS](#), you must specify the location of this existing Tomcat installation directory and its service name, the login name, and the password to be used by Financial Planning & Analysis.

### Unsupported Configuration Variations

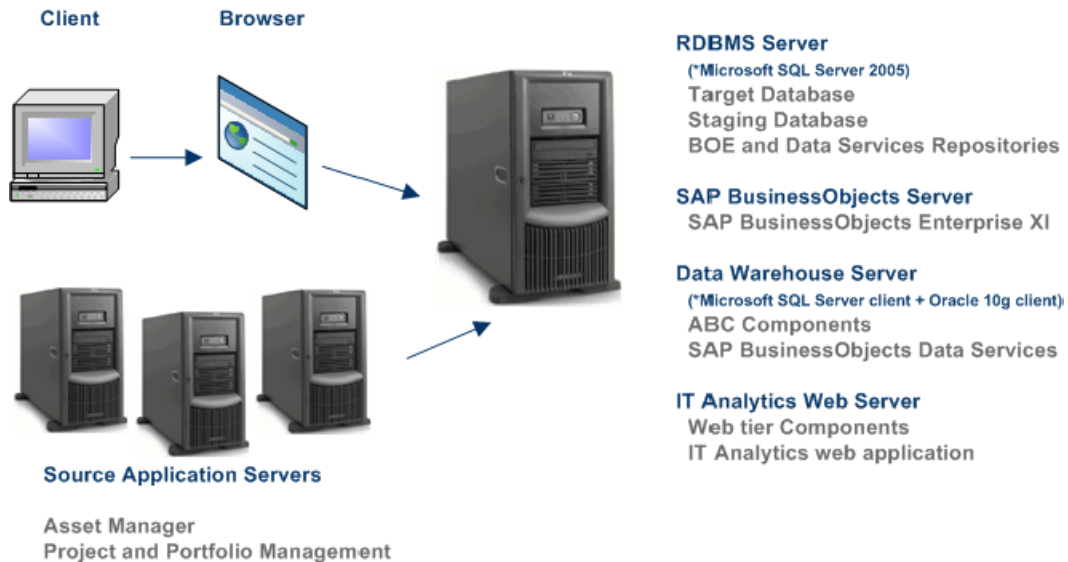
There are some installation scenarios that are not supported. In general, you should follow the described multiple server or single server scenarios described in this chapter. Only the exceptions noted in [Existing BOE Server](#) or [Non-BOE Tomcat](#) are supported. If you customize the server combination scenarios, you may not be able to install components successfully. For example, you cannot use an existing instance of BODS on a different server. You must install a new instance on the data warehouse server.

## Consolidated Server Environment

You can replicate a distributed configuration on a single server. In this scenario, all components share the same server. BODS has an integrated installation with BOE where BODS shares the Apache Tomcat instance installed with BOE.

You must have an RDBMS installation of Microsoft SQL Server 2005 on that server before you begin the Financial Planning & Analysis installation process. The data sources can be remote or local. Complete the installation of all other components on the same server. [Figure 2](#) on page 14 shows a consolidated configuration where all components are on the same server.

**Figure 2 Consolidated Environment**



## Other HP Software Products

The data warehouse imports source data created by other HP applications using an integral ETL process. This source data should reside on servers that are separate from the installed Financial Planning & Analysis and related data warehouse components.

## Installation Media

The installation media consolidates all the required components into two DVDs. DVD 1, labeled HP Financial Planning & Analysis 9.10, contains all the application installation files for BOE, BODS, the Financial Planning & Analysis application, and the data warehouse. Use this DVD to complete the tasks described in Chapter 7 through Chapter 9.

DVD 2, labeled *Dashboard Development Kit*, contains the installation files for the optional installation of SAP BusinessObjects Xcelsius 2008 SP3 and the Antivia Xcelsius™ Web Intelligence Integration Suite (XWIS) add-on. Install these products if you plan to use the dashboard feature of the Financial Planning & Analysis application. For more information, see [Appendix A, Installing SAP BusinessObjects Xcelsius and the Xcelsius XWIS Add-On](#).

# Installation Guide Overview

This guide contains information about how to install the HP Data Warehouse. Table 1 summarizes the content of each chapter.

**Table 1 Document Map**

<b>Chapter</b>	<b>Describes</b>
Chapter 1, Getting Started	Product overview.
Chapter 2, Requirements	Hardware, software, and other requirements.
Chapter 4, HP Licensing	How to obtain your license keys and passwords.
Chapter 3, Configuring Required Databases	Everything that you need to define on the RDBMS server.
Chapter 5, Installing Financial Planning & Analysis	The Financial Planning & Analysis installation and configuration tools.
Chapter 6, Installing SAP BusinessObjects Enterprise	Everything that you need to install and configure on the BOE server.
Chapter 7, Installing the Data Warehouse Server	Everything that you need to install and configure on the data warehouse server.
Chapter 8, Installing the Web Application and Antivia XWIS	Everything that you need to install and configure on the FPA web server.
Chapter 9, Configuring User Roles and Authentication	Configuring user access for LDAP or Active Directory.
Chapter 10, Next Steps	The remaining tasks for the initial sync and ETL run.
Appendix A, Installing SAP BusinessObjects Xcelsius and the Xcelsius XWIS Add-On	How to install BusinessObjects Xcelsius and Antivia Xcelsius™ Web Intelligence Integration Suite (XWIS).
Appendix B, Setting Up File Based Authentication	Configuring user access for file based authentication.
Appendix C, Installation Checklist	Checklists of server names, passwords, and paths that you need to gather before you begin the installation.

## Other Documentation Resources

There are other documentation sources that you need to reference for data management and administration tasks.

When you complete all the tasks described in this guide to install and configure a complete working environment for the Financial Planning & Analysis application, you can turn to the *HP Data Warehouse Administration Guide* for the information you need to prepare the data

warehouse for the first ETL job and other ongoing maintenance tasks. This guide, and related Financial Planning & Analysis documentation, is available on the product manuals web site at HP Software Product Manuals (<http://h20230.www2.hp.com/selfsolve/manuals>).

This site requires you to register as an HP Passport user and sign in. To register for an HP Passport, go to HP Passport Registration (<http://h20229.www2.hp.com/passport-registration.html>).

For all BOE or BODS tasks and troubleshooting, refer to the BOE documentation that accompanies the BusinessObjects installation software.

## Before You Begin

You can avoid problems by reading [Chapter 2, Requirements](#) carefully. Review the Support or Compatibility Matrix for each HP application that will access the data warehouse to ensure that you have the required environment for all applications to export data to, or import data from, the data warehouse. For more information, see the **HP Software Support** web site ([http://support.openview.hp.com/sc/support\\_matrices.jsp](http://support.openview.hp.com/sc/support_matrices.jsp)).



## 2 Requirements

Read this chapter to learn more about the preparation required before you begin the Financial Planning & Analysis installation.

- [Hardware Requirements](#) on this page
- [Operating System Requirements](#) on page 18
- [Third Party Software Requirements](#) on page 18
- [Other Requirements](#) on page 19

### Hardware Requirements

**Table 2** describes the minimum hardware requirements for the data warehouse. If you have a consolidated server environment, make sure that this server meets the combined total minimum space requirement. HP also recommends that you increase the number of processors for this single server to four.

**Table 2 Hardware Requirements**

Item	Minimum Requirement
<b>RAM</b>	Tomcat application server: 2 GB. Data warehouse server: 2 GB. SAP BusinessObjects Enterprise XI 3.1 (BOE) server with SAP Business Objects Data Services XI 3.1 (BODS) job server: 4 GB. Web server: 2 GB.
<b>Virtual Memory</b>	Tomcat application server: 2 GB. Data warehouse server: 2 GB. BOE server with BODS job server: 4 GB. Web server: 2 GB.
<b>Disk Space</b>	Tomcat application server: 3 GB. Data warehouse server: 5 GB. BOE server with BODS job server: 10 GB.† Web server: 2 GB.



† You can install BOE on an auxiliary disk drive; however, the installation process requires a minimum of 5 GB of temporary file space on the C drive. Do not begin the installation until you verify that you have this free space available.

# Operating System Requirements

All servers in the Financial Planning & Analysis environment require the Windows Server™ 2003 operating system with SP2. SAP BusinessObjects Xcelsius software can run on Windows XP or Vista operating systems.

## Third Party Software Requirements

The data warehouse requires third party components to support importing and exporting data. Use the Self-solve knowledge search feature on the HP Support web site to locate the Financial Planning & Analysis 9.10 Compatibility Matrix (**HP software support** ([www.hp.com/go/hpsoftwaresupport](http://www.hp.com/go/hpsoftwaresupport))). You must meet all software and hardware requirements described in the HP Financial Planning and Analysis 9.10 Compatibility Matrix before you begin the installation process.

### Java Memory Options

The Java virtual machine that runs the Tomcat application server hosting both the Financial Planning & Analysis web application and BOE Web tier requires specific memory options.

**Note:** If you have an external Tomcat, you **must** set the memory options to ensure that the BOE installation works.

If you use the Tomcat embedded with BOE, no additional configuration is required. If you have an external Tomcat instance, use the Configuration Tool to specify the Tomcat location, Service name, and whether the Configuration Tool can modify the server.xml file. Then configure the JVM running the Tomcat service with the following memory options. These are the minimum required values by BOE:

```
-Xmx1024m -XX:MaxPermSize=256m
```

To update Java memory options:

- 1 From the Windows **Start** menu, click > **All Programs** > **Tomcat** > **Tomcat Configuration**.
- 2 Click the **Java** tab.
- 3 Add these memory settings to **Java Options**:  
-Xmx1024m  
-XX:MaxPermSize=256m
- 4 Click **Apply** and **OK**.

If you have other applications that the Java virtual machine is hosting, you may have to adjust this setting.

For more information, see your Java or Apache Tomcat documentation.

### Microsoft Patches

Install these Microsoft operating system patches before you begin the installation process.


- Install the Microsoft Windows Server 2003 (**KB925336**) patch on the SAP Business Objects software server.

For more information, see the **Microsoft Download Center** web site ([www.microsoft.com/downloads/details.aspx?FamilyId=8EFFE1D9-7224-4586-BE2B-42C9AE5B9071&displaylang=en](http://www.microsoft.com/downloads/details.aspx?FamilyId=8EFFE1D9-7224-4586-BE2B-42C9AE5B9071&displaylang=en))

- Install the **Microsoft Visual C++ 2005 SP1 Redistributable Package (x86)** patch that contains Visual C++ Libraries runtime components on any server where you plan to install Financial Planning & Analysis components. In a distributed server environment, make sure that you install this patch on the Financial Planning & Analysis, Data Warehouse, and SAP Business Objects servers.

For more information, see the **Microsoft Download Center** web site (<http://www.microsoft.com/downloads/details.aspx?FamilyID=200b2fd9-ae1a-4a14-984d-389c36f85647&displaylang=en>).

- If you do not have an installed version of Microsoft Core XML Services (MSXML) 6.0 SP1, install the following on the BOE server:
  - Microsoft Core XML Services (MSXML) 6.0 Service Pack 1 (**msxml6\_x86.msi**).

 Microsoft Core XML Services (MSXML) 6.0 Service Pack 2 (**msxml6-KB954459-enu-x86.exe**) is an optional security patch on MSXML 6.0 SP1.

For more information, see the **Microsoft Download Center** web site (<http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=d21c292c-368b-4ce1-9dab-3e9827b70604>) and see (<http://www.microsoft.com/downloads/details.aspx?FamilyId=59914795-60c7-4ebe-828d-f28cb457e6e3&displaylang=en>)

## Other Requirements

Review and verify that the servers where you plan to install Financial Planning & Analysis components meet the requirements described in the HP Financial Planning & Analysis 9.10 Compatibility Matrix. There are other considerations before you begin the complete Financial Planning & Analysis installation process. Make sure that:

- You have Administrator rights to access your database server, the name of the server, and the password.
- Users who will log on to the BOE server have appropriate rights.
- You have the JRE version described in the HP Financial Planning & Analysis 9.10 Compatibility Matrix on every server where you plan to install a Financial Planning & Analysis component.
- You create a JAVA\_HOME environment variable that points to the supported JRE on every server where you plan to install a Financial Planning & Analysis component. In case there are multiple versions installed on any server, JAVA\_HOME will always point to the correct JRE.

## License Requirements

If you have an existing BOE installation, you can use that instance. If you purchase BOE with the HP application, the purchase includes the required licenses.

Other applications that generate or use data require separate licenses. For more information about licenses, contact your HP sales representative or visit the **HP software support** ([www.hp.com/go/hpsoftwaresupport](http://www.hp.com/go/hpsoftwaresupport)) web site. If you obtain SAP BusinessObjects software products from HP, the HP License Key Delivery Service web site ([webware.hp.com](http://webware.hp.com)) manages HP software licensing for the Financial Planning & Analysis application. For more information, see [Chapter 4, HP Licensing](#).

## RDBMS License Requirements

Obtain Microsoft SQL Server 2005 Enterprise Edition software and license keys directly from Microsoft Corporation to manage the BOE, data warehouse, target and staging databases.

In addition, BODS requires an Oracle client installation on the data warehouse server. If you do not have Oracle Database 10g client software, go to the **Oracle.com** site to download and install the free Database 10g Instant Client version 10.2.0.4 software before you begin the tasks in [Chapter 7, Installing the Data Warehouse Server](#).



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## 3 Configuring Required Databases

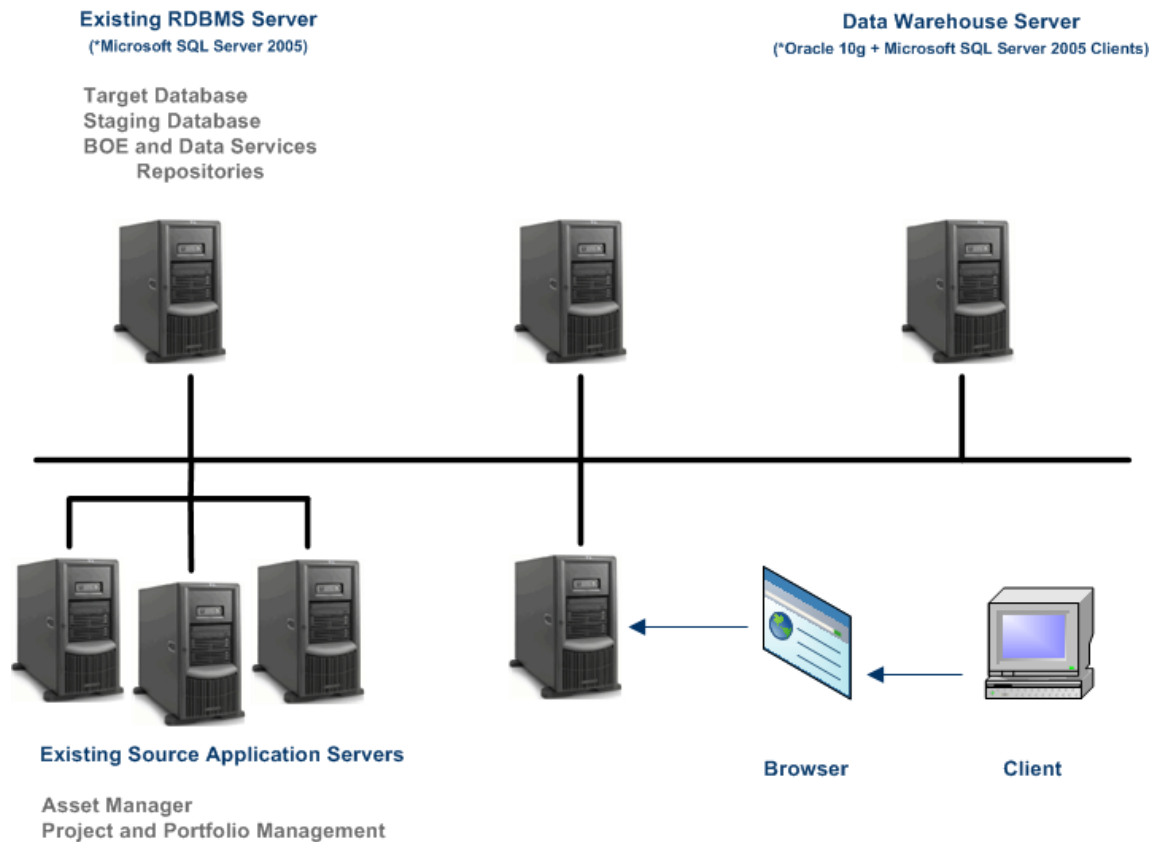
The supported RDBMS is Microsoft SQL Server 2005. Verify that you have a complete installation and configuration of the RDBMS server environment before you install the Financial Planning & Analysis components. There are required databases that you must create on the RDBMS server and ODBC connections that you must define to connect Financial Planning & Analysis applications and the Financial Planning & Analysis data warehouse to these databases. [Figure 3](#) shows the RDBMS server and the resident databases to be configured. Complete these tasks on the RDBMS server.

- [Task 1: Install Microsoft SQL Server 2005 SP2 and sqlcmd Utility](#) on page 24.
- [Task 2: Set Authentication Properties](#) on page 25.
- [Task 3: Enable TCP/IP](#) on page 25.
- [Task 4: Create the Required Databases](#) on page 26.
- [Task 5: Configure the BODS Database Port Number](#) on page 33.

Complete this task on the data warehouse server:

- [Task 6: Verify the RDBMS Clients](#) on page 34.

**Figure 3 RDBMS server**



## Task 1: Install Microsoft SQL Server 2005 SP2 and sqlcmd Utility

Any installation of Microsoft SQL Server 2005 must have Microsoft SQL Server 2005 service pack (SP) 2 applied. If you already installed SP2 and you are working in the single server configuration, you can proceed to [Task 2: Set Authentication Properties](#).

If your data warehouse is on a separate server, as shown in [Figure 3](#) on page 24, and your data warehouse server does not have SQL Server 2005 client/server components installed, for example, no SQL Server Management Studio, you must install both the Microsoft SQL Server 2005 sqlcmd utility and the Microsoft SQL Server Native Client on the data warehouse server. Note that the Microsoft SQL Server 2005 sqlcmd utility and the Microsoft SQL Server Native Client can be found in the **Feature Pack for Microsoft SQL Server 2005** on the RDBMS server.

For more information, see the **Microsoft Download** web site (<http://www.microsoft.com/downloads/details.aspx?FamilyID=d09c1d60-a13c-4479-9b91-9e8b9d835cdc&displaylang=en>).



To make sure that any directory can call the sqlcmd utility, after you install the utility, edit the Path system variable to add the directory location of the sqlcmd utility.

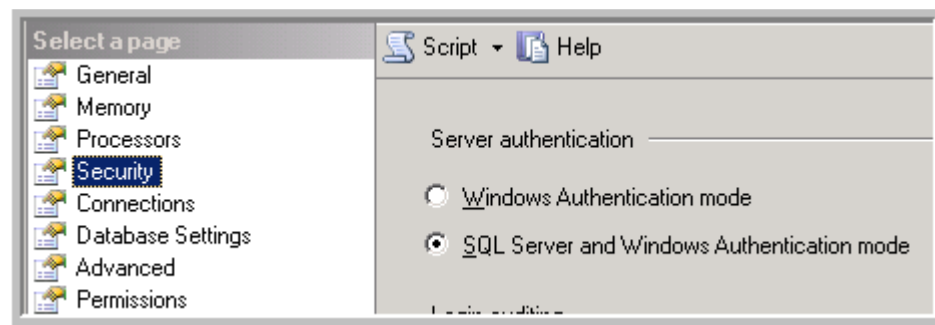


## Task 2: Set Authentication Properties

To set your server authentication properties, follow these steps.

- 1 From the Windows **Start** menu, click > **All Programs** > **Microsoft SQL Server 2005** > **SQL Server Management Studio**.
- 2 Log in the with appropriate credentials.
- 3 In the **Object Explorer**, right-click the server name and select **Properties**.
- 4 Click **Security** in the left navigation pane (**Select a page**).
- 5 If necessary, select **SQL Server and Windows Authentication mode**, shown in [Figure 4](#).

**Figure 4 Server Security Properties**

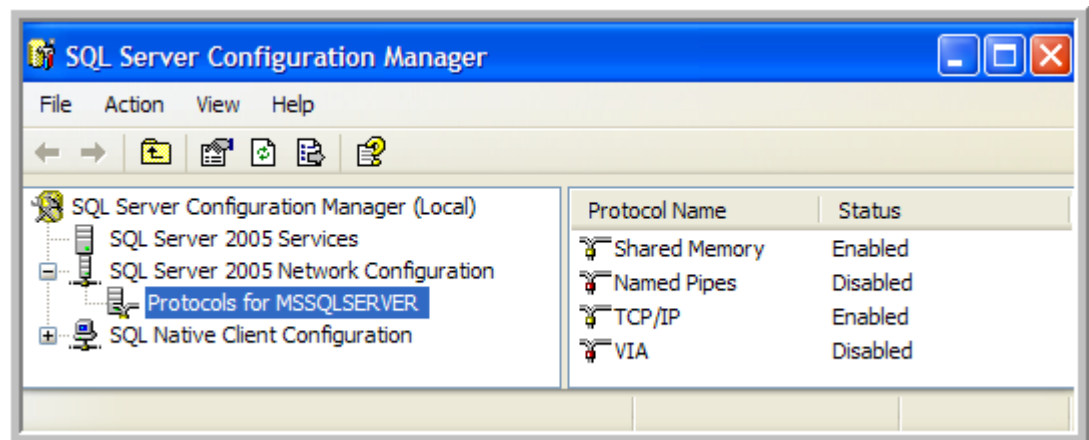


## Task 3: Enable TCP/IP

To enable TCP/IP, follow these steps.

- 1 From the Windows **Start** menu, click > **All Programs** > **Microsoft SQL Server 2005** > **Configuration Tools** > **SQL Server Configuration Manager**.
- 2 In the navigation pane, expand **SQL Server 2005 Network Configuration**.
- 3 Click **Protocols for MSSQLSERVER**.
- 4 If necessary, right-click **TCP/IP** and select **Enable**. [Figure 5](#) shows the correct Protocol settings.

**Figure 5 Configuration Manager**



## Task 4: Create the Required Databases

Follow the instructions in this section to create the six databases that FPA requires:

- A BusinessObjects Enterprise (BOE) Central Management Server (CMS) database, which manages security, metadata, and content such as reports and universes.
- A BOE Audit database, which monitors user actions and helps track and manage your BOE deployment.
- A BusinessObjects DataServices (BODS) database, required by DataServices.
- An FPA staging database for ETL.
- An FPA target database for ETL.
- An Antivia Xcelsius Web Intelligence Integration Suite (XWIS) database, which contains data such as business intelligence system entries and XWIS license and user information.



**Note:** You will create the ODBC connections to these databases when you begin the BOE server installation in [Chapter 6, Installing SAP BusinessObjects Enterprise](#).

### Guidelines for creating databases

Follow these guidelines when you create the required databases:

- Before you create the databases, make sure that each database is on a *separate named instance* of Microsoft SQL Server. For more information, see your Microsoft SQL Server documentation.
- You can refer to the information in [Database Naming Conventions](#) on page 113 for tips about database names. The names of the databases are user-defined but if you use the suggested names in this guide, the names will be descriptive and meet all syntax requirements. For later reference, the name in the Checklist should be the same value that you specify in the naming process.
- When you define each required database, you must specify a collation that supports Unicode *nchar*, *nvarchar* and *ntext* column data types.

- The login for each BOE database must have read/write/administration rights.
- The default database for the boecms login must be the boecms database.
- The default database for the boeaudit login must be the boeaudit database.

## Create the BOE CMS Database

- 1 From the Windows **Start** menu, select **Programs > Microsoft SQL Server 2005 > SQL Server Management Studio**.
- 2 Log in to SQL Server Management Studio.
- 3 Select **Databases** in the Object Explorer pane, right-click, and select **New Database**. The New Database window opens.
- 4 On the General page, type the database name. Do not create a BOE CMS database with embedded blanks or special characters in the database name.  
Example: boecms  
Invalid names: boe cms, boe@cms
- 5 Click **Options** to open the Options page.
- 6 Select **SQL\_Latin1\_General\_CP1\_CI\_AS** from the Collation drop-down list. This collation type supports Unicode nchar, nvarchar, and ntext column data types.
- 7 Click **OK**.
- 8 In the Object Explorer pane, select the **Security** folder. This is the Security folder for the main server. Right-click the folder, and select **New > Login**. The Login - New window opens.
- 9 On the General page, type the login name. You must create a different login name for the CMS, Audit, BODS, FPA staging, FPA target, and XWIS databases.
- 10 Select **SQL Server authentication**.
- 11 In the Password field, type the password for the login name. Then retype the password in the Confirm password field.
- 12 Clear the **Enforce password policy**, **Enforce password expiration**, and **User must change password at next login** check boxes.
- 13 Select the BOE CMS database name from the Default database drop-down list.
- 14 Click **Server Roles** to open the Server Roles page.
- 15 Select the **public** (if available) and **sysadmin** roles.
- 16 Click **User Mapping** to open the User Mapping page.
- 17 In the Users mapped to this login area, select the CMS database that you just created. The Users column becomes populated with the login name that you created in step 8.
- 18 In the Default Schema column, click in the cell to the right of the User column, and type the same value that appears in the User column.
- 19 Press **Enter**.
- 20 In the Database role membership for area, select **db\_owner**. Also make sure that **public** is selected.
- 21 Click **OK**.

For information about additional database and security settings, refer to the Microsoft SQL Server documentation.

## Create the BOE Audit Database

- 1 From the Windows **Start** menu, select **Programs > Microsoft SQL Server 2005 > SQL Server Management Studio**.
- 2 Log in to SQL Server Management Studio.
- 3 Select **Databases** in the Object Explorer pane, right-click, and select **New Database**. The New Database window opens.
- 4 On the General page, type the database name. Do not create a BOE Audit database with embedded blanks or special characters in the database name.  
Example: boeaudit  
Invalid names: boe audit, boe@audit
- 5 Click **Options** to open the Options page.
- 6 Select **SQL\_Latin1\_General\_CP1\_CI\_AS** from the Collation drop-down list. This collation type supports Unicode nchar, nvarchar, and ntext column data types.
- 7 Click **OK**.
- 8 In the Object Explorer pane, select the **Security** folder. This is the Security folder for the main server. Right-click the folder, and select **New > Login**. The Login - New window opens.
- 9 On the General page, type the login name. You must create a different login name for the CMS, Audit, BODS, FPA staging, FPA target, and XWIS databases.
- 10 Select **SQL Server authentication**.
- 11 In the Password field, type the password for the login name. Then retype the password in the Confirm password field.
- 12 Clear the **Enforce password policy**, **Enforce password expiration**, and **User must change password at next login** check boxes.
- 13 Select the BOE Audit database name from the Default database drop-down list.
- 14 Click **Server Roles** to open the Server Roles page.
- 15 Select the **public** (if available) and **sysadmin** roles.
- 16 Click **User Mapping** to open the User Mapping page.
- 17 In the Users mapped to this login area, select the Audit database that you just created. The Users column becomes populated with the login name that you created in step 8.
- 18 In the Default Schema column, click in the cell to the right of the User column, and type the same value that appears in the User column.
- 19 Press **Enter**.
- 20 In the Database role membership for area, select **db\_owner**. Also make sure that **public** is selected.
- 21 Click **OK**.

For information about additional database and security settings, refer to the Microsoft SQL Server documentation.

## Create the BODS Database

- 1 From the Windows **Start** menu, select **Programs > Microsoft SQL Server 2005 > SQL Server Management Studio**.
- 2 Log in to SQL Server Management Studio.
- 3 Select **Databases** in the Object Explorer pane, right-click, and select **New Database**. The New Database window opens.
- 4 On the General page, type the database name. Do not create a BODS database with embedded blanks or special characters in the database name.  
Example: bodsrepo  
Invalid names: bods repo, bods@repo
- 5 Click **Options** to open the Options page.
- 6 Select **SQL\_Latin1\_General\_CP1\_CI\_AS** from the Collation drop-down list. This collation type supports Unicode nchar, nvarchar, and ntext column data types.
- 7 Click **OK**.
- 8 In the Object Explorer pane, select the **Security** folder. This is the Security folder for the main server. Right-click the folder, and select **New > Login**. The Login - New window opens.
- 9 On the General page, type the login name. You must create a different login name for the CMS, Audit, BODS, FPA staging, FPA target, and XWIS databases.
- 10 Select **SQL Server authentication**.
- 11 In the Password field, type the password for the login name. Then retype the password in the Confirm password field.
- 12 Clear the **Enforce password policy**, **Enforce password expiration**, and **User must change password at next login** check boxes.
- 13 Select the BODS database name from the Default database drop-down list.
- 14 Click **Server Roles** to open the Server Roles page.
- 15 Select the **public** (if available) and **sysadmin** roles.
- 16 Click **User Mapping** to open the User Mapping page.
- 17 In the Users mapped to this login area, select the BODS database that you just created. The Users column becomes populated with the login name that you created in step 8.
- 18 In the Default Schema column, click in the cell to the right of the User column, and type the same value that appears in the User column.
- 19 Press **Enter**.
- 20 In the Database role membership for area, select **db\_owner**. Also make sure that **public** is selected.
- 21 Click **OK**.

For information about additional database and security settings, refer to the Microsoft SQL Server documentation.

## Create the FPA Staging Database

- 1 From the Windows **Start** menu, select **Programs > Microsoft SQL Server 2005 > SQL Server Management Studio**.
- 2 Log in to SQL Server Management Studio.
- 3 Select **Databases** in the Object Explorer pane, right-click, and select **New Database**. The New Database window opens.
- 4 On the General page, type the database name. Do not create an FPA staging database with embedded blanks or special characters in the database name.  
Example: fpastaging  
Invalid names: fpa staging, fpa@staging
- 5 Click **Options** to open the Options page.
- 6 Select **SQL\_Latin1\_General\_CP1\_CI\_AS** from the Collation drop-down list. This collation type supports Unicode nchar, nvarchar, and ntext column data types.
- 7 Click **OK**.
- 8 In the Object Explorer pane, select the **Security** folder. This is the Security folder for the main server. Right-click the folder, and select **New > Login**. The Login - New window opens.
- 9 On the General page, type the login name. You must create a different login name for the CMS, Audit, BODS, FPA staging, FPA target, and XWIS databases.
- 10 Select **SQL Server authentication**.
- 11 In the Password field, type the password for the login name. Then retype the password in the Confirm password field.
- 12 Clear the **Enforce password policy**, **Enforce password expiration**, and **User must change password at next login** check boxes.
- 13 Select the FPA staging database name from the Default database drop-down list.
- 14 Click **Server Roles** to open the Server Roles page.
- 15 Select the **public** (if available) and **sysadmin** roles.
- 16 Click **User Mapping** to open the User Mapping page.
- 17 In the Users mapped to this login area, select the FPA staging database that you just created. The Users column becomes populated with the login name that you created in step 8.
- 18 In the Default Schema column, click in the cell to the right of the User column, and type the same value that appears in the User column.
- 19 Press **Enter**.
- 20 In the Database role membership for area, select **db\_owner**. Also make sure that **public** is selected.
- 21 Click **OK**.

For information about additional database and security settings, refer to the Microsoft SQL Server documentation.

## Create the FPA Target Database

- 1 From the Windows **Start** menu, select **Programs > Microsoft SQL Server 2005 > SQL Server Management Studio**.
- 2 Log in to SQL Server Management Studio.
- 3 Select **Databases** in the Object Explorer pane, right-click, and select **New Database**. The New Database window opens.
- 4 On the General page, type the database name. Do not create an FPA target database with embedded blanks or special characters in the database name.  
Example: fpatarget  
Invalid names: fpa target, fpa@target
- 5 Click **Options** to open the Options page.
- 6 Select **SQL\_Latin1\_General\_CP1\_CI\_AS** from the Collation drop-down list. This collation type supports Unicode nchar, nvarchar, and ntext column data types.
- 7 Click **OK**.
- 8 In the Object Explorer pane, select the **Security** folder. This is the Security folder for the main server. Right-click the folder, and select **New > Login**. The Login - New window opens.
- 9 On the General page, type the login name. You must create a different login name for the CMS, Audit, BODS, FPA staging, FPA target, and XWIS databases.
- 10 Select **SQL Server authentication**.
- 11 In the Password field, type the password for the login name. Then retype the password in the Confirm password field.
- 12 Clear the **Enforce password policy**, **Enforce password expiration**, and **User must change password at next login** check boxes.
- 13 Select the FPA target database name from the Default database drop-down list.
- 14 Click **Server Roles** to open the Server Roles page.
- 15 Select the **public** (if available) and **sysadmin** roles.
- 16 Click **User Mapping** to open the User Mapping page.
- 17 In the Users mapped to this login area, select the FPA target database that you just created. The Users column becomes populated with the login name that you created in step 8.
- 18 In the Default Schema column, click in the cell to the right of the User column, and type the same value that appears in the User column.
- 19 Press **Enter**.
- 20 In the Database role membership for area, select **db\_owner**. Also make sure that **public** is selected.
- 21 Click **OK**.

For information about additional database and security settings, refer to the Microsoft SQL Server documentation.

## Create the Antivia XWIS Database

- 1 From the Windows **Start** menu, select **Programs > Microsoft SQL Server 2005 > SQL Server Management Studio**.
- 2 Log in to SQL Server Management Studio.
- 3 Select **Databases** in the Object Explorer pane, right-click, and select **New Database**. The New Database window opens.
- 4 On the General page, type the database name. Do not create an XWIS database with embedded blanks or special characters in the database name.  
Example: antiviaxwis  
Invalid names: antivia xwis, antivia@xwis
- 5 Click **Options** to open the Options page.
- 6 Select **SQL\_Latin1\_General\_CP1\_CI\_AS** from the Collation drop-down list. This collation type supports Unicode nchar, nvarchar, and ntext column data types.
- 7 Click **OK**.
- 8 In the Object Explorer pane, select the **Security** folder. This is the Security folder for the main server. Right-click the folder, and select **New > Login**. The Login - New window opens.
- 9 On the General page, type the login name. You must create a different login name for the CMS, Audit, BODS, FPA staging, FPA target, and XWIS databases.
- 10 Select **SQL Server authentication**.
- 11 In the Password field, type the password for the login name. Then retype the password in the Confirm password field.
- 12 Clear the **Enforce password policy**, **Enforce password expiration**, and **User must change password at next login** check boxes.
- 13 Select the XWIS database name from the Default database drop-down list.
- 14 Click **Server Roles** to open the Server Roles page.
- 15 Select the **public** (if available) and **sysadmin** roles.
- 16 Click **User Mapping** to open the User Mapping page.
- 17 In the Users mapped to this login area, select the XWIS database that you just created. The Users column becomes populated with the login name that you created in step 8.
- 18 In the Default Schema column, click in the cell to the right of the User column, and type the same value that appears in the User column.
- 19 Press **Enter**.
- 20 In the Database role membership for area, select **db\_owner**. Also make sure that **public** is selected.
- 21 Click **OK**.

For information about additional database and security settings, refer to the Microsoft SQL Server documentation.



## Task 5: Configure the BODS Database Port Number

When you install BODS on the data warehouse server, you will have to create a connection to the BODS database on the RDBMS server. To complete this task, you will need the port number.

- 1 From the Windows **Start** menu, click > **Programs > Microsoft SQL Server 2005 > Configuration Tools > SQL Server Configuration Manager**.
- 2 In the navigation pane, expand **SQL Server 2005 Network Configuration**.
- 3 Click **Protocols for MSSQLSERVER**.
- 4 Right-click **TCP/IP** and select **Properties**.
- 5 Select the **IP Addresses** tab.
- 6 If necessary, expand (or scroll down to) the **IPAll** section.
- 7 Record the TCP Port number in the [2a\) BODS Configuration Information](#) section of the Checklist on [page 116](#). You will need this information later.

## Task 6: Verify the RDBMS Clients

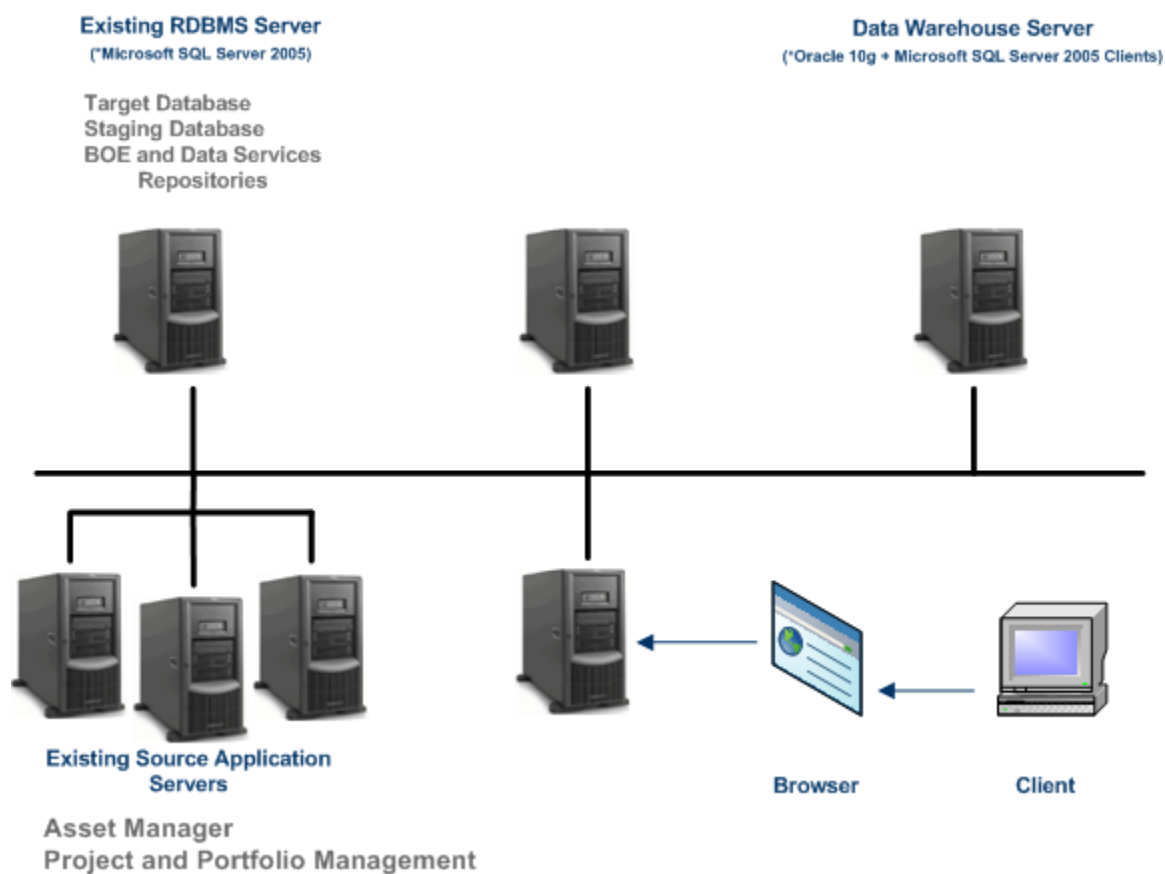
Verify that there is RDBMS client software installed on the data warehouse server. You must have two clients:

- A Microsoft SQL Server 2005 client to support connection to the databases on the RDBMS server. Use your licensed Microsoft SQL Server 2005 installation media to install only a client on this server. A full installation is not required.
- An Oracle client to support BODS. If you do not have licensed Oracle 10g Release 2 (10.2.x.x) client software, go to the **Oracle.com** web site to download free client software before you begin the data warehouse installation ([Chapter 7, Installing the Data Warehouse Server](#)).

For more information, see the **Oracle.com** web site (<http://www.oracle.com/technology/software/products/database/xehdocs/102xewinsoft.html>).

Figure 6 shows the two RDBMS clients on the data warehouse server.

**Figure 6 RDBMS Clients**



## 4 HP Licensing

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

Follow the steps in the *ESD and Webware License Management Guide* to present your HP order number, select the products that need licenses, and provide other required information. If you are a first time visitor to the web site, you will be asked to create an account with an email address and password. Most requests to generate permanent license keys require the following:

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

### Managing Permanent License Keys

After you create your user account on the **HP License Key Delivery Service** web site, generate the entitlement certificate, and generate the license keys, the License Key Delivery Service sends permanent keys to you in an email text file attachment. When you receive the permanent license key file, stage it in a convenient directory on one of the servers where you plan to install Financial Planning & Analysis components.

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

### Porting the License File

From the stored location of the license file, you must copy it to a similar directory on each server where you plan to install one of these Financial Planning & Analysis components:

- SAP BusinessObjects Enterprise XI 3.1
- SAP BusinessObjects Data Services XI 3.1
- Financial Planning & Analysis data warehouse
- Financial Planning & Analysis web application

To import the license file, copy it to an external USB storage device, or use a File Transfer Protocol (FTP) tool to store the license file on each affected server. During installation, the Configuration Tool will request the path to the permanent license file on each of these servers.

# 5 Installing Financial Planning & Analysis

The Financial Planning & Analysis installer is self-directing with embedded instructions and default values. You can change these values to suit your local environment. There are two installation tools:

- The installer builds the directory structure and positions the files for configuration.
- The Configuration Tool collects relevant information and installs the associated components.

Before you start the installation process on any server, verify that you completed the steps to acquire the license keys file from HP and port it to the target server. For more information, see [Chapter 4, HP Licensing](#).

## Running the Installer

The installer builds the directory structure on the target server and stages the files for final installation in the specified path. As you proceed through the installation, you can choose a complete setup for a single server, or a custom setup for a multiple server environment.

If you have an existing implementation of IT Analytics 2.01 and you want to upgrade to Financial Planning & Analysis 9.10, install the new version and use the Configuration Tool to complete the installation. You must install the upgrade in a separate directory. Failure to do so will cause the system to become inoperable.



HP recommends that you always back up your data before you begin a new installation. For more information, see the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.

## Installation Path

During the Financial Planning & Analysis installation, you can override the default installation path and choose a custom path. However, make sure that the number of characters in the directory structure path does not exceed the maximum 256 characters that Financial Planning & Analysis permits. Avoid all special characters in paths except underscores (\_), periods (.), back slashes (\), and blanks.



Do not install Financial Planning & Analysis 9.10 in the same folder that you installed previous implementations of IT Analytics 2.00 or IT Analytics 2.01. If you do so, you will overwrite files that the Configuration Tool references and cause the system to be inoperable.

HP recommends that you use the default path to avoid installation path issues.

To install Financial Planning & Analysis 9.10

- 1 Close all windows before you install Financial Planning & Analysis 9.10.
- 2 Insert the Financial Planning & Analysis media into the DVD/CD-ROM drive.

- 3 Follow the prompts. The installer builds the directory structure on the target server and stages the files for final installation in the specified path.  
As you proceed through the installation, you can choose a complete setup for a single server or a custom setup for a multiple server environment.
- 4 Click **Finish**.
- 5 Wait for the Configuration Tool to open, then configure Financial Planning & Analysis.

## Running the Configuration Tool

The Configuration Tool is a user interface that collects required information, such as login names, passwords, and other information and applies it as needed to the actual file installation. The Configuration Tool divides the installation process into three parts:

### 1 Install BOE

- ▶ • You can choose the location of the BOE software installation.
- The default location must be outside the Financial Planning & Analysis installation path.
- The maximum number of characters that SAP BusinessObjects permits in the directory structure is 39 characters.

### 2 Install BODS and build the data warehouse

### 3 Install the Financial Planning & Analysis web application and the Antivia Xcelsius Web Intelligence Integration Suite (XWIS)

You must follow this logical order because the installation of one component depends on the success of the prior steps.

The Configuration Tool marks each step when you complete it successfully with a green check mark. If the step is not successful, the Configuration Tool displays a red X for that step. If you exit and restart the Configuration Tool, always begin after the last successful step. The Configuration Tool abandons a step and displays a red X if you exit before the successful completion of that step. [Figure 7](#) on page 40 shows the three main parts of the installation and the subordinate steps in Part 2.

## About the Configuration Path

The **Configuration Path** screen enables you choose whether to install a new instance of Financial Planning & Analysis or to upgrade an existing instance. After you commit to a configuration path, this screen will no longer appear. To re-enable this screen in the event of an upgrade failure, you must modify the config.ini file.

To modify the config.ini file

- 1 Open this file with a text editor:

C:\Program Files\HP\FPA 9.10\Setup\Config Tool\config.ini

- 2 Locate these properties and set the value to blank:

```
install.showUpgradeOptionScreen=  
install.type=  
install.upgrade.configStatus=
```

- 3 Save and close the file.

## Configuring Financial Planning & Analysis 9.10

You must use the Configuration Tool to upgrade to or install Financial Planning & Analysis 9.10.

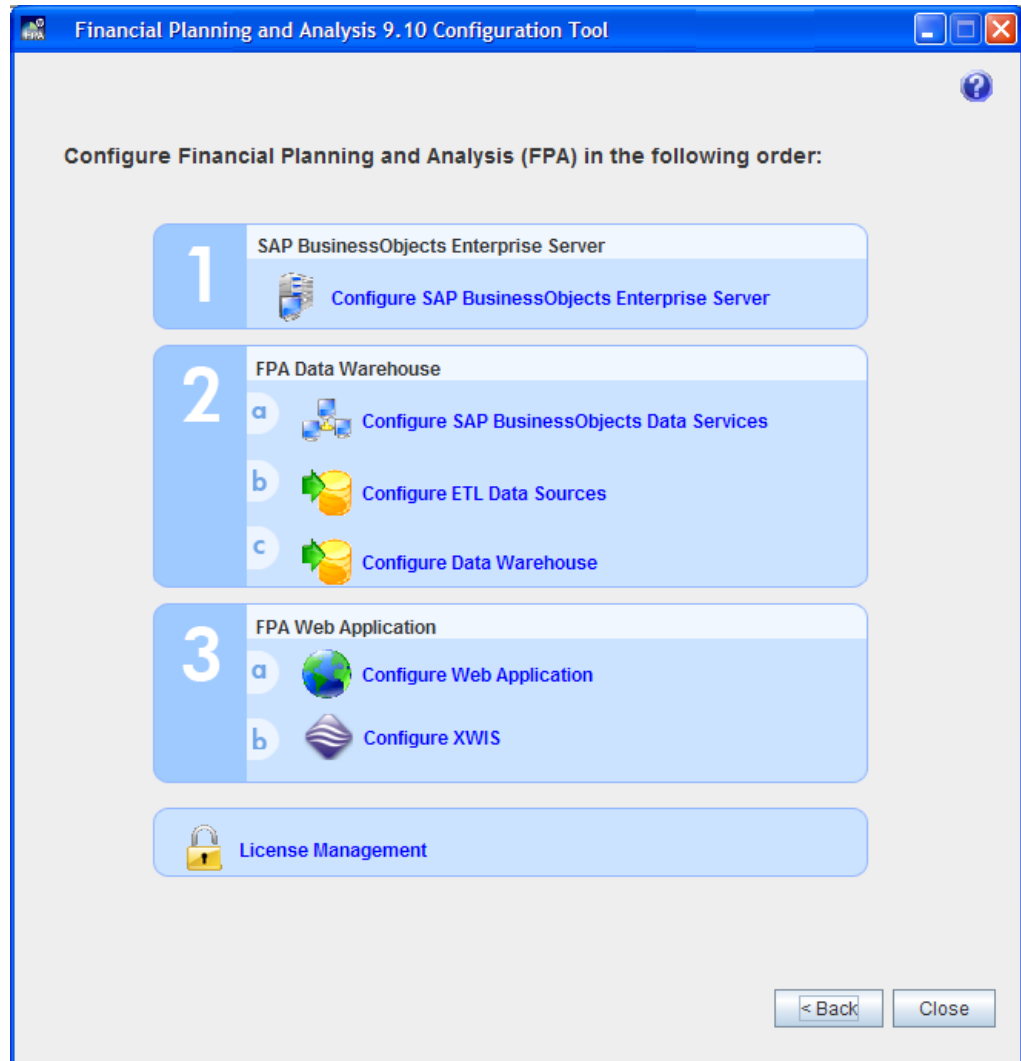



The upgrade process removes customized files. If you customized any ETL files, you must update them when you complete the installation.

HP recommends that you back up the staging database, target database, and the SAP BusinessObjects Data Services XI 3.1 repository before you begin a new installation or upgrade an existing configuration. For more information, see the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.

- 1 From the Windows **Start** menu, click **All Programs > HP > FPA 9.10 > Configuration Tool**.
- 2 If necessary, complete the steps to copy and import the license file. For more information, see [Porting the License File](#) on page 35.
- 3 On the **Configuration Path** dialog, select the configuration type.
  - For a new installation, click **Configure A New Instance**. Click **Next**. At the Main Menu, begin Part 1 of the Configuration Tool, then complete Part 2a, 2b, 2c and Part 3a and 3b. Because this is a new configuration, do not proceed to [step 4](#) of these instructions.
  - To upgrade a previous installation, click **Upgrade An Existing Instance**. Click **Next** and follow the prompts.

**Figure 7 Configuration Tool**



4. Verify the **Product**, **Version**, and **Install Location** of the previous configuration.
    - a. If the **Install Location** path is missing or incorrect, click **Browse** to select the correct location.
    - b. If the **Install Location** path is correct, click **Next** to verify the configuration. You must have a successfully installed IT Analytics 2.01 to continue.
      - If the installation verification fails, a warning message displays that the file is incorrect.
      - If the installation verification is valid, this message displays: **This option will erase all customizations. Do you want to continue?**
    - c. Do one of the following actions:
      - To continue, click **Yes**.
-  Do not install Financial Planning & Analysis 9.10 in the same folder that you installed previous implementations of IT Analytics 2.00 or IT Analytics 2.01. If you do so, you will overwrite files that the Configuration Tool references and cause the system to be inoperable.



- To stop the configuration process, click **Exit** or **Cancel**.

## Upgrading to Financial Planning & Analysis 9.10

Financial Planning & Analysis, formerly known as IT Analytics, uses the existing underlying architecture of IT Analytics. Follow these guidelines to upgrade from IT Analytics 2.01 to Financial Planning & Analysis 9.10.



Before you begin the upgrade process, make sure that you meet these requirements:

- IT Analytics 2.01 is successfully installed and configured.
- If you ran initial sync, you must restore your Staging and Target databases to their original state. For more information, contact your Data Base Administrator.
- The external file folders were created. For example:  
C:\ETL\_EXTRACTIONS\EXTERNAL  
C:\ETL\_EXTRACTIONS\AM  
C:\ETL\_EXTRACTIONS\PPM



The upgrade process overwrites your customizations. If you customized any ETL files, you must update them after completing the upgrade process.

When upgrading from IT Analytics 2.01 to Financial Planning & Analysis 9.10 using either LDAP or Windows AD authentication, you must update the security roles because their names have changed.

**Table 3 User Groups**

IT Analytics Group Name	Financial Planning & Analysis Group Name
ITA_ADMIN	FPA_ADMIN
ITA_ANALYTIC	FPA_ANALYTIC
ITA_CE_CONFIG	FPA_CE_CONFIG
DW_ADMIN	DW_ADMIN (no change)

See [Task 2a: Configure LDAP Authentication](#) on page 80 and [Task 2b: Configure Active Directory Authentication](#) on page 84 for more information about changing the BOE security roles.

- 1 Back up the staging database, target database, and the SAP BusinessObjects Data Services XI 3.1 repository. For more information, see the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.
- 2 Insert the Financial Planning & Analysis media into the DVD/CD-ROM drive and double-click **HP\_FPA\_910.msi**.
- 3 After the installer is launched, select **Upgrade** as the installation path and follow the prompts to complete the upgrade.
- 4 If you see a pop-up message indicating that FPA is unable to stop the Tomcat service, you must manually uninstall IT Analytics 2.00 and IT Analytics 2.01 and delete the installation folders.

- a Stop Tomcat.
    - From the Windows **Start** menu, click **Programs > Control Panel > Administrative Tools > Services**.
    - Right-click the Apache Tomcat service and select **Stop**.
  - b From the Windows **Start** menu, click **Control Panel > Add or Remove Programs** (or **Programs and Features**).
    - Locate **ITA 2.00.166** and click **Remove**. Proceed to the next step if the entry is not there.
    - Locate **ITA 2.01** and click **Remove**. Proceed to the next step if the entry is not there.
  - c Remove the following folders from the IT Analytics 2.00 installation directory. The default path is C:\Program Files\HP\IT Analytics 2.00.
    - ContentPacks
    - Foundation
    - Patches
    - Setup
    - Web Application
  - d Restart Tomcat.
- 5 When the upgrade process completes, click **Finish**.
  - 6 From the Windows **Start** menu, click **All Programs > HP > FPA 9.10 > Configuration Tool** to start the Configuration Tool.
  - 7 Configure Financial Planning & Analysis as needed. See [Configuring Financial Planning & Analysis 9.10](#) on page 39.
  - 8 Manually execute this additional SQL script on your target database:  
fpa91\_migration\_target\_schema\_additional.sql
    - Navigate to this location from your Financial Planning & Analysis installation directory. For example: C:\Program Files\HP\FPA 9.10\Setup\Resources\Scripts
  - 9 You must restart BusinessObjects services and Tomcat.
    - a From the Windows **Start** menu, click **Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > Central Configuration Manager**.
    - b Right-click the **Server Intelligence Agent (IT Analytics)** service and select **Restart**.
    - c In the Central Configuration Manager, right-click the Apache Tomcat 5.5.20 service and select **Restart**.
  - 10 Before running ETL, copy the AllocationMetric.xls file from the installed files to the external directory that was created in Part 2c of the Configuration Tool.
    - a Navigate to  
C:\Program Files\HP\FPA 9.10\ContentPacks\FPA\ETL\flatfiles\spreadsheets.
    - b Copy and paste the AllocationMetric.xls file to the external sources folder. For example, D:\EXTERNAL.
  - 11 Run ETL. For more information, see the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.

# Uninstalling the Software

Although you can uninstall the software using the Windows Control Panel Add or Remove Programs utility, HP recommends that you also remove files and related databases to delete data generated by the data warehouse.

- 1 From the Windows **Start** menu, click **Control Panel > Add or Remove Programs**.
- 2 Navigate to **Financial Planning & Analysis 9.10** and click **Remove**.
- 3 To remove all FPA components from your system, do the following:
  - a Uninstall SAP BusinessObjects Enterprise (BOE). For more information, see the BOE documentation.
  - b Uninstall SAP BusinessObjects Data Services (BODS). For more information, see the BODS documentation.
- 4 Using Windows Explorer, navigate to this directory to delete all files and sub-directories:  
C:\Program Files\HP\FPA 9.10\
  - 5 If you configured the FPA databases, you must delete them.
    - a To delete the Staging and Target databases, go to the database management console that you used to create the databases. For more information, see your database documentation.
    - b To delete the SAP BusinessObjects Data Services (BODS) repository, see the SAP BODS documentation.
    - c To delete the SAP BusinessObjects Enterprise (BOE) CMS/Audit Databases, see the BOE documentation.
    - d To delete Antivia XWIS files that the silent installer created, open a Windows command line window to run this command:

```
java -DantiviaInstallDir="C:\Program Files\HP\FPA\Antivia XWIS"  
-DwebAppDeploymentDestination="C:\Program Files\HP\BOE\Tomcat55"  
-DwebAppDeploymentPackage="C:\Program Files\HP\FPA\Setup  
  \Antivia XWIS Installer\ant-frame-deploy-xwis-hp.zip"  
-DANTIVIA_CONFIG_DIRECTORY="C:\Program Files\HP\FPA\Antivia XWIS  
  \config"  
-DantiviaDBCConnectUrl="jdbc:sqlserver://localhost;databaseName=XWIS"  
-DantiviaDBUid=sa -DantiviaDBPwd=passwd  
-DantiviaDBPlatform=MSSQLServer  
-Doem=HP02 -DhideDeploymentProgress=true  
-DremoveDeployedFiles=true  
-jar config-tool-2.0.491.jar
```



# 6 Installing SAP BusinessObjects Enterprise

Financial Planning & Analysis uses BOE server software for a variety of tasks. The BOE server software typically is on a separate server, as shown in [Figure 8](#).

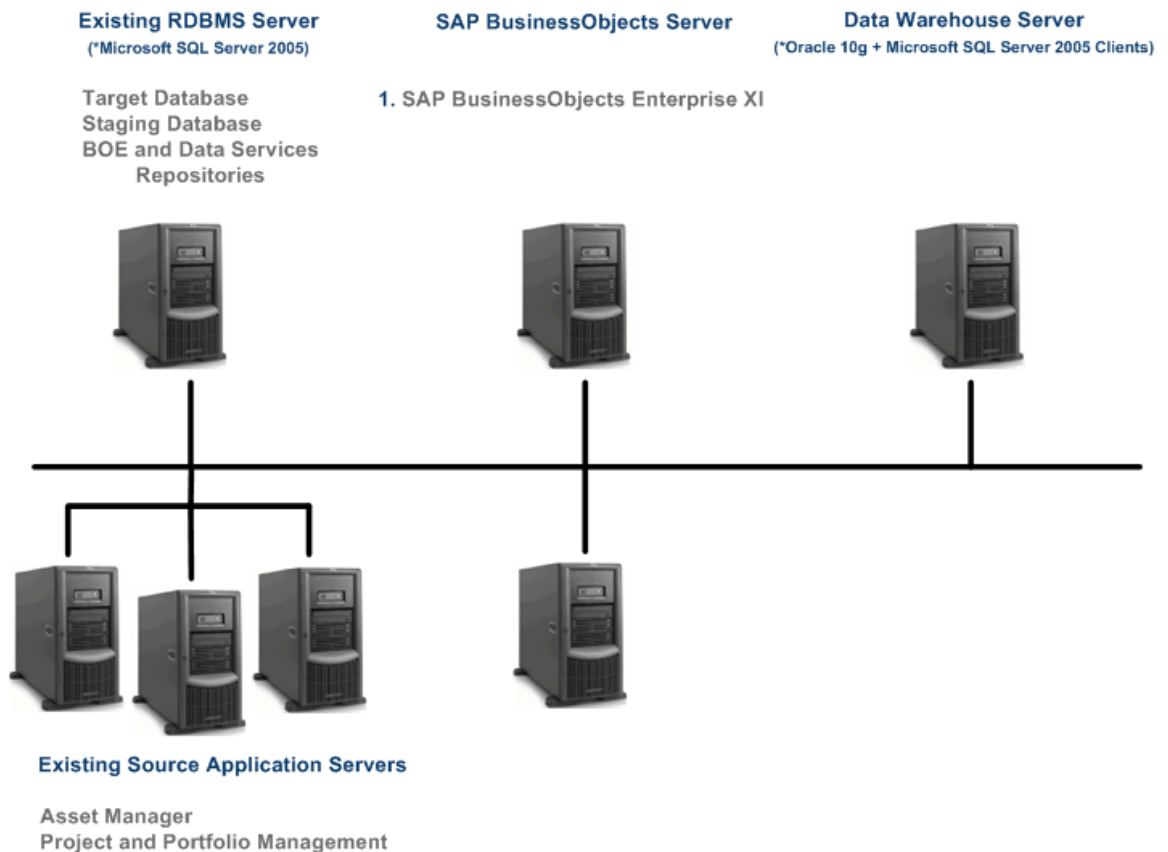


Only the English language pack is installed with BusinessObjects products.

Complete these tasks on the BOE server.

- [Task 1: Configure the BOE CMS Database DSN on page 46.](#)
- [Task 2: Configure the BOE Audit Database DSN on page 47.](#)
- [Task 3: Configure the Data Warehouse Administration DSN on page 47.](#)
- [Task 4: Configure the Data Warehouse Operations DSN on page 48.](#)
- [Task 5: Configure the Financial Planning & Analysis DSN on page 48.](#)
- [Part 1: Install SAP BusinessObjects Enterprise Server on page 49.](#)

**Figure 8 SAP BusinessObjects server**



The BOE installation also populates the boecms and boeaudit databases that you created in [Chapter 3, Configuring Required Databases](#) with schemas and data.



Before you begin the BOE installation, make sure that the server meets the requirements described in [Chapter 2, Requirements](#). BOE must have enough free space to complete the installation and perform daily tasks. If there is not enough free space, the installation will fail.

At the end of this installation process, you will have a complete installation of the BOE server software and access to all the BOE components, including:

- BusinessObjects Enterprise Central Management Console
- BusinessObjects Enterprise Java InfoView
- Central Configuration Manager
- Universe Builder
- BOE documentation

## Creating ODBC Connections

Before you begin the BOE installation, create the required ODBC connections. These connections are from the BOE server to databases on the RDBMS server:

- BOE Central Management Server (CMS) database
- BOE audit database
- The data warehouse databases (to view two types of data warehouse reports)
- The IT Analytics universe

Use the Windows ODBC Data Source Administrator wizard to complete the following tasks.

### Task 1: Configure the BOE CMS Database DSN

Use the information in the [BOE CMS Database Connections](#) section of the Checklist on [page 115](#). Create this DSN to access the BOE CMS database.

- 1 From the Windows **Start** menu, click **Control Panel > Administrative Tools > Data Sources (ODBC)**. Windows displays the ODBC Data Source Administrator wizard.
- 2 Click the **System DSN** tab.
- 3 Click **Add**.
- 4 Select **SQL Server** from the list of drivers.
- 5 Click **Finish**.
- 6 Type the **Name** of the new data source connection (DSN). For example: boecms\_dsn. Refer to the naming convention that you defined in the Checklist on [page 115](#).
- 7 Type a brief **Description** of the DSN.
- 8 Select the name of the **Server** where SQL Server resides. If the server is remote, the server name will appear in the drop-down list.
- 9 Click **Next**.

- 10 Select the **SQL Server** authentication option.
- 11 Type the **Login ID** and **Password** to access the server.
- 12 Click **Next**.
- 13 Click **Next**, then **Finish** to accept the remaining default values shown in the remaining dialog boxes.
- 14 Click **Test Connection** to verify that you can connect to the RDBMS server.
- 15 Click **OK** to return to the **ODBC Data Source Administrator** wizard.



If you chose to create a single BOE database to serve both CMS and Audit functions in [Task 4: Create the Required Databases](#) on page 26, you can skip Task 2 and go to [Task 3: Configure the Data Warehouse Administration DSN](#).

## Task 2: Configure the BOE Audit Database DSN

Use the information in the [BOE Audit Database Connections](#) section of the Checklist on page 115. Create this DSN to access the BOE audit database.

- 1 On the **System DSN** tab, click **Add**.
- 2 Select **SQL Server** from the list of drivers.
- 3 Click **Finish**.
- 4 Type the **Name** of the new DSN. For example: boeaudit\_dsn. Refer to the naming convention that you defined in the Checklist on [page 115](#).
- 5 Type a brief **Description** of the DSN.
- 6 Select the name of the **Server** where SQL Server resides. If the server is remote, the server name will appear in the drop-down list.
- 7 Click **Next**.
- 8 Select the **SQL Server authentication** option.
- 9 Type the **Login ID** and **Password** to access the server.
- 10 Click **Next**.
- 11 Click **Next**, then **Finish** to accept the remaining default values shown in the remaining dialog boxes.
- 12 Click **Test Connection** to verify that you can connect to the RDBMS server.
- 13 Click **OK** to return to the **OCBC Data Source Administrator** wizard.

## Task 3: Configure the Data Warehouse Administration DSN

Create this DSN to view data warehouse administrative reports using BOE Infview tools.

- 1 On the **System DSN** tab, click **Add**.
- 2 Select **SQL Server** from the list of drivers.
- 3 Click **Finish**.
- 4 Type the **Name** of the new DSN. You *must* specify this name: ita\_admin.
- 5 Type a brief **Description** of the DSN. For example: ABC administration reports connection.

- 6 Select the name of the **Server** where SQL Server resides. If the server is remote, the server name will appear in the drop-down list.
- 7 Click **Next**.
- 8 Select the **SQL Server** authentication option.
- 9 Type the **Login ID** and **Password** to access the server.  
Use **sa** and the accompanying password until you establish your own ODBC connection. See [Check ODBC Connections](#) on page 63.
- 10 Click **Next**.
- 11 Click **Next**, then **Finish** to accept the remaining default values shown in the remaining dialog boxes.
- 12 Click **Test Connection** to verify that you can connect to the RDBMS server.
- 13 Click **OK** to return to the **OCBC Data Source Administrator** wizard.

## Task 4: Configure the Data Warehouse Operations DSN

Create this DSN to view data warehouse operations reports using BOE Infoview tools.

- 1 On the **System DSN** tab, click **Add**.
- 2 Select **SQL Server** from the list of drivers.
- 3 Click **Finish**.
- 4 Type the **Name** of the new DSN. You *must* specify this name: ita\_operations.
- 5 Type a brief **Description** of the DSN. For example: ABC operational reports connection.
- 6 Select the name of the **Server** where SQL Server resides. If the server is remote, the server name will appear in the drop-down list.
- 7 Click **Next**.
- 8 Select the **SQL Server** authentication option.
- 9 Type the **Login ID** and **Password** to access the server.  
Use **sa** and the accompanying password until you establish your own ODBC connection. See [Check ODBC Connections](#) on page 63.
- 10 Click **Next**.
- 11 Click **Next**, then **Finish** to accept the remaining default values shown in the remaining dialog boxes.
- 12 Click **Test Connection** to verify that you can connect to the RDBMS server.
- 13 Click **OK** to return to the **OCBC Data Source Administrator** wizard.

## Task 5: Configure the Financial Planning & Analysis DSN

Create this DSN to view the analytics produced by the Financial Planning & Analysis application using BOE Infoview tools.

- 1 On the **System DSN** tab, click **Add**.
- 2 Select **SQL Server** from the list of drivers.
- 3 Click **Finish**.



- 4 Type the **Name** of the new DSN. You *must* specify this name: itafpaqry.
- 5 Type a brief **Description** of the DSN. For example: FPA analytics query.
- 6 Select the name of the **Server** where SQL Server resides. If the server is remote, the server name will appear in the drop-down list.
- 7 Click **Next**.
- 8 Select the **SQL Server** authentication option.
- 9 Type the **Login ID** and **Password** to access the server.  
Use **sa** and the accompanying password until you establish your own ODBC connection. See [Check ODBC Connections](#) on page 63.
- 10 Click **Next**.
- 11 Click **Next**, then **Finish** to accept the remaining default values shown in the remaining dialog boxes.
- 12 Click **Test Connection** to verify that you can connect to the RDBMS server.
- 13 Click **OK** to return to the **OCBC Data Source Administrator** wizard.
- 14 Click **OK** to close the ODBC Data Source Administrator wizard.

## Part 1: Install SAP BusinessObjects Enterprise Server

**Consolidated Server:** Complete [step 11](#) on page 50 through [step 19](#) on page 52 on the consolidated server.

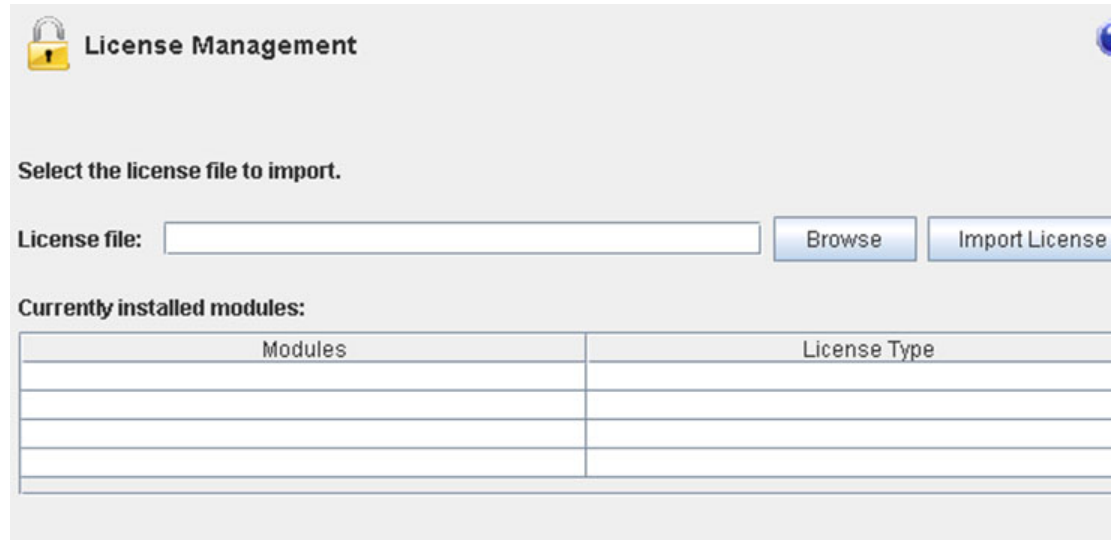


Sequence is important with SAP BusinessObjects tools. If you plan to use the BOE instance of Apache Tomcat for BODS, you must install BOE before you install BODS.

If you uninstall BOE and BODS uses the shared Apache Tomcat, BODS will lose access to Apache Tomcat.

**Multiple Servers:** From the BOE server, follow these steps.

- 1 If necessary, complete the steps to copy and import the license file. For more information, see [Porting the License File](#) on page 35.
- 2 Insert the Financial Planning & Analysis media into the DVD/CD-ROM drive.
- 3 Complete the **Welcome** tasks.
- 4 Choose **Custom Setup**.
- 5 Select **SAP BusinessObjects Enterprise Server**.
- 6 Confirm (or change) the installation path and click **Next**.
- 7 The Financial Planning & Analysis installer copies the required files from the installation media. Click **Finish** to start the Configuration Tool.
- 8 When you begin the configuration process, the first task is to specify the location of the license file. Click **Browse** to locate the license file path that you specified in the [Part 1: SAP BusinessObjects Enterprise XI 3.1 Server Checklist](#) on page 115.

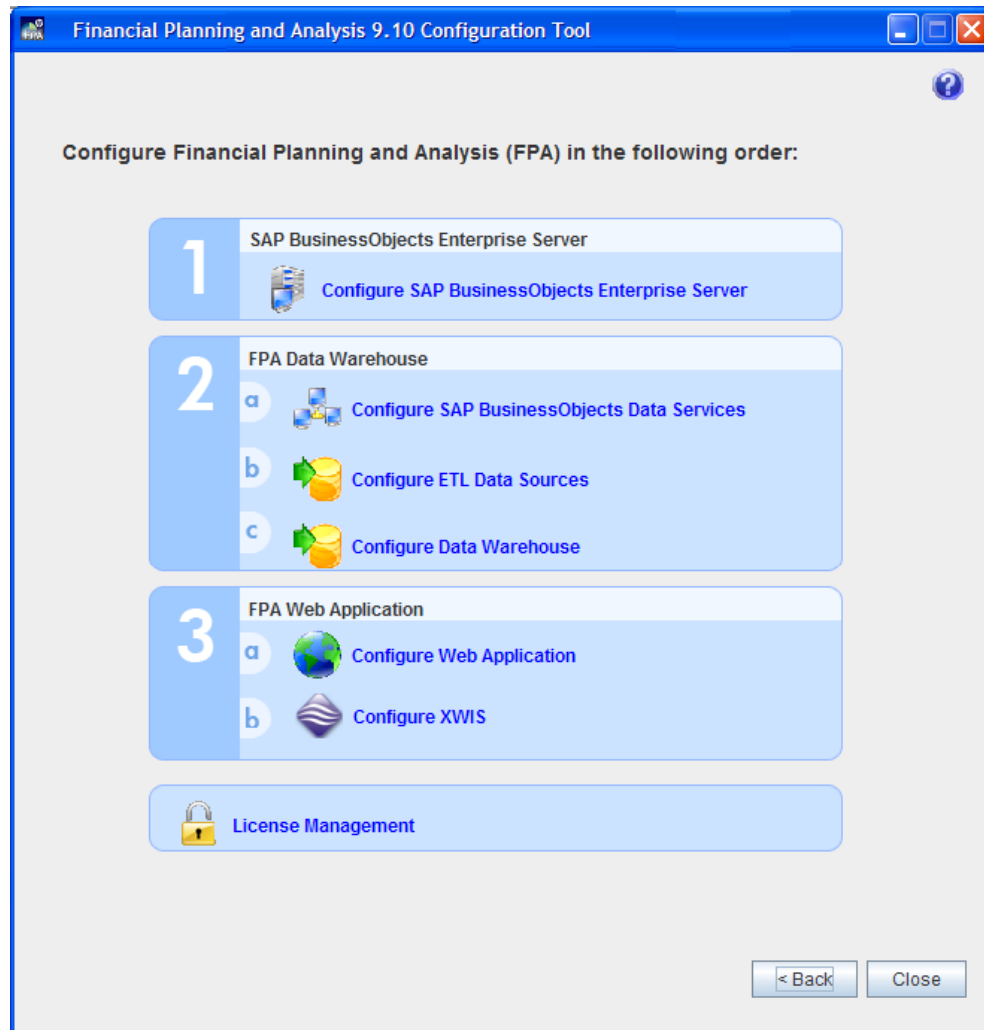


- 9 Click **Import License** to store the license details and expiration dates.



- 10 Click **Run Configuration** to proceed with configuring the Financial Planning & Analysis component.
- 11 From the Configuration Tool main menu, shown in [Figure 9](#), select **Configure SAP BusinessObjects Enterprise Server**.

**Figure 9 Configuration Tool**




12 On the **Install Directory** tab, specify the installation path and click **Next**.

- ▶ • The installation path must not be in the same directory as Financial Planning & Analysis.
- If you do not specify **\boe** as a subdirectory of your installation path, the configuration tool will create one for you and place all boe files in this subdirectory.
- Make sure that the number of characters in the directory structure path does not exceed the maximum 39 characters that SAP BusinessObjects permits.

13 Now you must specify the same database connection and login information that you used to build the BOE CMS and Audit databases on the RDBMS server, and the names of the ODBC connections that you created on the BOE server. Refer to the names that you specified in [Part 1: SAP BusinessObjects Enterprise XI 3.1 Server Checklist](#) on page 115.

On the **CMS Database** tab, specify the ODBC data source (DSN) name, database name, login, and password.

14 Click **Verify Connection** to ensure that you have database connectivity, then click **Next**.

- 15 On the **Audit Database** tab, specify the ODBC data source (DSN) name, database name, login, and password that you specified in [Part 1: SAP BusinessObjects Enterprise XI 3.1 Server Checklist](#) on page 115. If you chose to create a single database, select the option to **Use the same database as the CMS**, click **Next**, and skip to [step 17](#).
- 16 Click **Verify Connection** to ensure that you have database connectivity, then click **Next**.
- 17 Click **Next** to review the configuration information.
- 18 Click **Run Configuration** to begin the file installation process.
  -  Make sure that you do not click **Run Configuration** until you are ready to commit to the BOE installation. BOE is a large product that requires a significant amount of time to install, and if you terminate the installation process, you will have to manually clear partially installed files. Even if you close the Configuration Tool window, the BOE silent installation will continue.
- 19 Click **Finish** when the file installation process is complete.

## Verification

You can confirm that the BOE server installation is successful.

- From the Windows **Start** menu, click **All Programs** to verify that there is a **BusinessObjects XI 3.1 > BusinessObjects Enterprise** program group.
- You should be able to start any of the applications listed in the BusinessObjects Enterprise program group.

## Troubleshooting

The Configuration Tool displays a list of actions and a check mark when each finishes successfully. If an error occurs, the installation and configuration process stops.

The Configuration Tool maintains a log that is a running history of all installation events. If an error occurs during the installation process, log messages can provide information to help you remedy the error. If an error occurs during the installation and configuration process, click **View Logs** to display the related logs. The log generated by the Configuration Tool is

C:\Program Files\HP\FPA 9.10\Setup\Config Tool\logs\config.log

The Configuration Tool appends new event information as you complete each step. Therefore, an error may occur that is captured in the log, and then the correction shows that the next attempt is successful. To locate the information about the most recent error, scroll to the bottom of the log and read upwards.

### BOE Errors

If an error occurs, click **View Logs**. The Configuration Tool displays a BOE log file and the Configuration Tool log. The log generated by the BOE installer is

C:\Program Files\HP\FPA 9.10\Setup\BO Installers\boe\boeConfig.log

Verify that:

- You have enough free disk space to manage the installation. There should be at least 10 GB of free space available before you begin.

- You have no previous installation of BOE on that server. Use the Add or Remove Programs utility in the Windows Control Panel to verify that you have no existing installation of BOE that should be uninstalled.
- You have access to the folders where the installation software resides. You can be a SYSTEM user, or a named user.

## BOE Fixpack 1.2 Installation

The installation process includes application of BOE FP 1.2. You can verify that the fixpack installed correctly if you open this log:

<bo\_install\_dir>\BusinessObjects Enterprise 12.0\Logging\BOE\_SP1FP2\_Install\_0.log

Look for this message:

```
Product: BusinessObjects Enterprise XI 3.1 - Update 'BusinessObjects
Enterprise XI 3.1 FP1.2' installed successfully.
```

## Fixpack Failure

The fixpack application that occurs during the BOE installation may fail if there is a missing operating system component: MSXML 6.0. This component should be available if the BOE server has the Windows Server 2003 Service Pack 2 applied before you begin the installation.

- 1 Look for these messages in this log:

C:\Program Files\HP\FPA 9.10\Setup\Config Tool\logs\config.log:

```
[INFO] com.hp.ita.configtool.util.StreamReader - Wed May 20 15:45:24 PDT
2009 OK: ERROR - FixPack installation failed. See log file.
[ERROR] com.hp.ita.configtool.util.SwingWorkerManager - Install SAP BOE
fix pack failed: 2
```

- 2 And look for this message in this log:

C:\Program Files\HP\FPA\_9.10\Setup\BO Installers\boe\boeConfig.log:

```
[INFO] com.hp.ita.configtool.util.SwingWorkerManager - SAP BOE
configuration failed
```

- 3 Verify that the MSXML 6.0 component is installed, or obtain the component from Microsoft and install it. For more information, see [Microsoft Patches](#) on page 18.

## Fixpack Workaround

If the fixpack installation fails, follow these steps to install it manually:

- 1 Exit from the Configuration Tool.
- 2 Click the following to restart the fixpack installation:  
C:\Program Files\HP\FPA 9.10\Setup\resources\media\boe-fp1.2\setup.exe
- 3 Restart the Configuration Tool and proceed to the next step.

## BOE Installation Log Messages

If a CMS warning popup appears during BOE installation, an installation problem occurred. The warning says that the CMS could not (or did not) start and you have a choice to **Retry** or **Cancel**. The installation can fail because of access issues to the database, such as unsupported characters in the password, unauthorized access rights, or other user limitations.

If the Retry option produces the same error message, do the following:

- Open the BOE CMS database and look in the tables folder to verify that tables exist in the CMS database. If there are no tables, verify that you specified the correct login credentials.

- Navigate to the installation log file:

C:\Documents and Settings\dwuser\Local Settings\Temp\1\BOEInstall\_0.log

Look for messages that describe an error condition:

```
MSI (s) (08:5C) [15:38:21:224]: Invoking remote custom action. DLL:
C:\WINNT\Installer\MSI60.tmp, Entrypoint: FixService
```

```
MSI (s) (08:70) [15:38:21:584]: Executing op:
ActionStart(Name=BOBJConfigDbServer.60F4A18A_ACCB_48F0_A673_017C6A585288,
Description=Configuring Databases,Template=Server: [1], Database: [2])
```

```
MSI (s) (08:70) [15:38:21:599]: Executing op:
CustomActionSchedule(Action=BOBJConfigDbServer.60F4A18A_ACCB_48F0_A673_01
7C6A585288,ActionType=25665,Source=BinaryData,Target=***** ,CustomAct
ionData=*****)
```

```
MSI (s) (08:10) [15:38:21:662]: Invoking remote custom action. DLL:
C:\WINNT\Installer\MSI61.tmp, Entrypoint: BOBJConfigDbServer
5/27/2009, 15:38:22: [ODBC] About to connect to ODBC Server
5/27/2009, 15:38:22: [ODBC] SQLDriverConnect failed: SQL_ERROR
5/27/2009, 15:38:22: [ODBC] 28000 [Microsoft][ODBC SQL Server Driver][SQL
Server]Login failed for user 'dbuser'.
```

- Verify that you met all the requirements described in the Compatibility Matrix before you began the installation.
- Verify that the passwords you specified do not contain blanks or unsupported characters.
- Use the Windows Control Panel Add/Remove Programs feature to uninstall any Financial Planning & Analysis components that appear in the Programs list.
- Restart the server.
- Restart the installation process from the beginning.

## Upgrade Errors

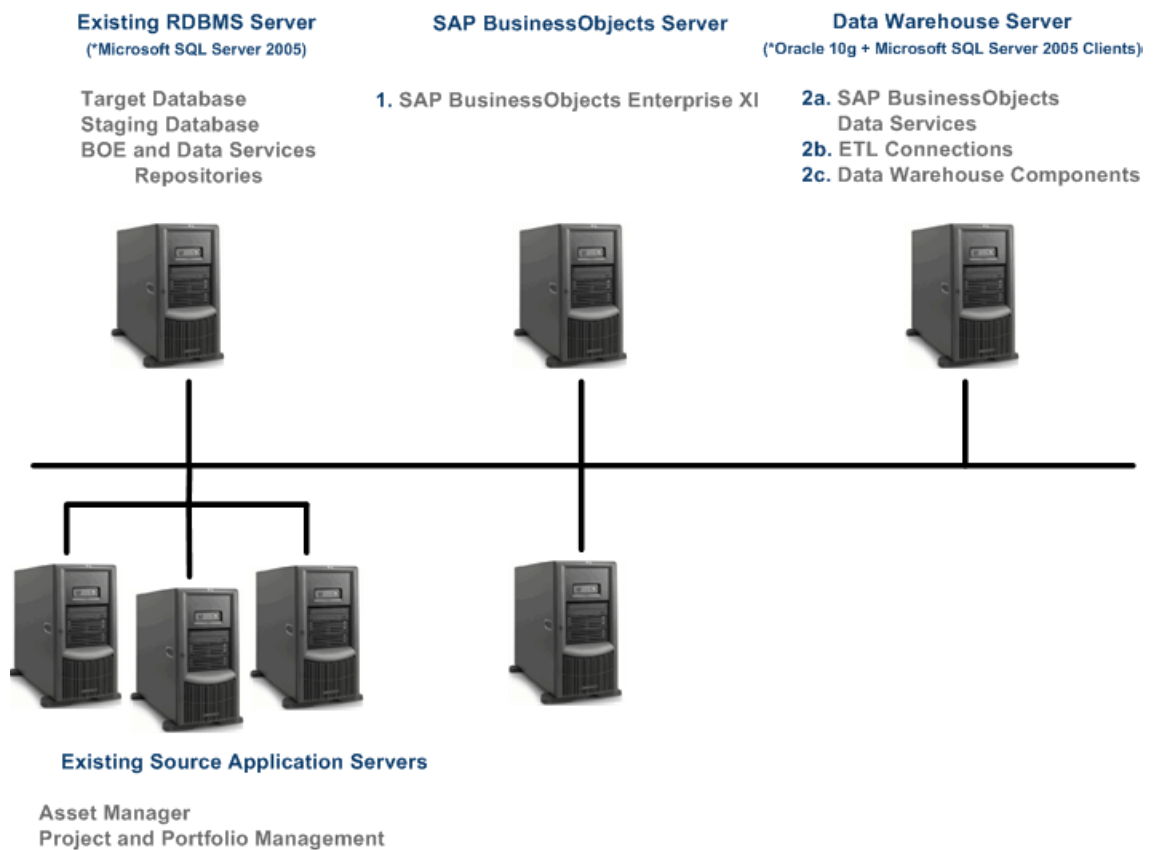
In the event of an upgrade error, you must modify the config.ini file. See [About the Configuration Path](#) on page 38.

# 7 Installing the Data Warehouse Server

Financial Planning & Analysis uses SAP BusinessObjects Data Services XI 3.1 (BODS) software to extract data from remote data sources. The BODS software is on the data warehouse server, as shown in [Figure 10](#). Complete these tasks on the data warehouse server.

- [Part 2a: Configure SAP BusinessObjects Data Services](#) on page 57.
- [Part 2b: Configure ETL Data Sources](#) on page 60.
- [Part 2c: Configure the Data Warehouse](#) on page 62.

**Figure 10 Data Warehouse Server**



At the end of this part of the installation process, the data warehouse server contains:

- Data warehouse developer tools
- ABC tools to run ETL jobs
- BODS

The RDBMS Server contains:

- The bods database that you created in [Chapter 3, Configuring Required Databases](#) populated with schemas and data.
- The data warehouse staging and target databases that you created in [Chapter 3, Configuring Required Databases](#) populated with schemas.

## RDBMS Clients

Verify that you have a Microsoft SQL Server client and an Oracle 10g client installed on the data warehouse server. You must install an Oracle 10g client even if you have an Oracle 11g client. The data warehouse requires a Microsoft SQL Server client to update the databases that you created on the RDBMS server. BODS and the data warehouse depend on an Oracle client for connectivity to source databases.



After completing the configuration and before running the ETL, run a SQL script to create views for each of your identified source databases. For more information about running these scripts, see *Task 2: Create the Source Data Views* in the Initialization and ETL chapter of the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.

## License Installation

**Consolidated Server:** Skip to [Part 2a: Configure SAP BusinessObjects Data Services](#) on page 57 to continue the installation on the consolidated server.



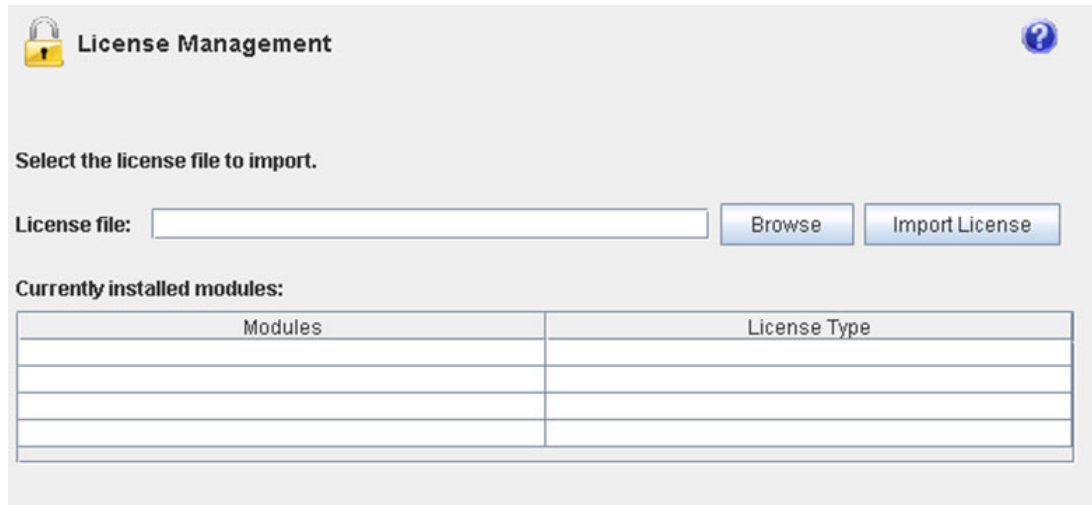
Sequence is important with SAP BusinessObjects tools. If you plan to use the BOE instance of Apache Tomcat for BODS, you must install BOE before you install BODS.

If you uninstall BOE and BODS uses the shared Apache Tomcat, BODS will lose access to Apache Tomcat.

**Multiple Servers:** From the data warehouse server, follow these steps.

- 1 If necessary, complete the steps to copy and import the license file. For more information, see [Porting the License File](#) on page 35.
- 2 Insert the Financial Planning & Analysis media into the DVD/CD-ROM drive.
- 3 Complete the **Welcome** tasks.
- 4 Choose **Custom Setup**.
- 5 Select **Data Warehouse Environment**.
- 6 Confirm the installation path and click **Next**.
- 7 The Financial Planning & Analysis installer copies the required files from the installation media. Click **Finish** to start the Configuration Tool.
- 8 When you begin the configuration process, the first task is to specify the location of the license file. Click **Browse** to locate the license file path that you specified in [Part 2: Financial Planning & Analysis Data Warehouse Checklist](#) on page 116.





- 9 Click **Import License** to store the license details and expiration dates.



- 10 Click **Run Configuration** to proceed with configuring the Financial Planning & Analysis component.

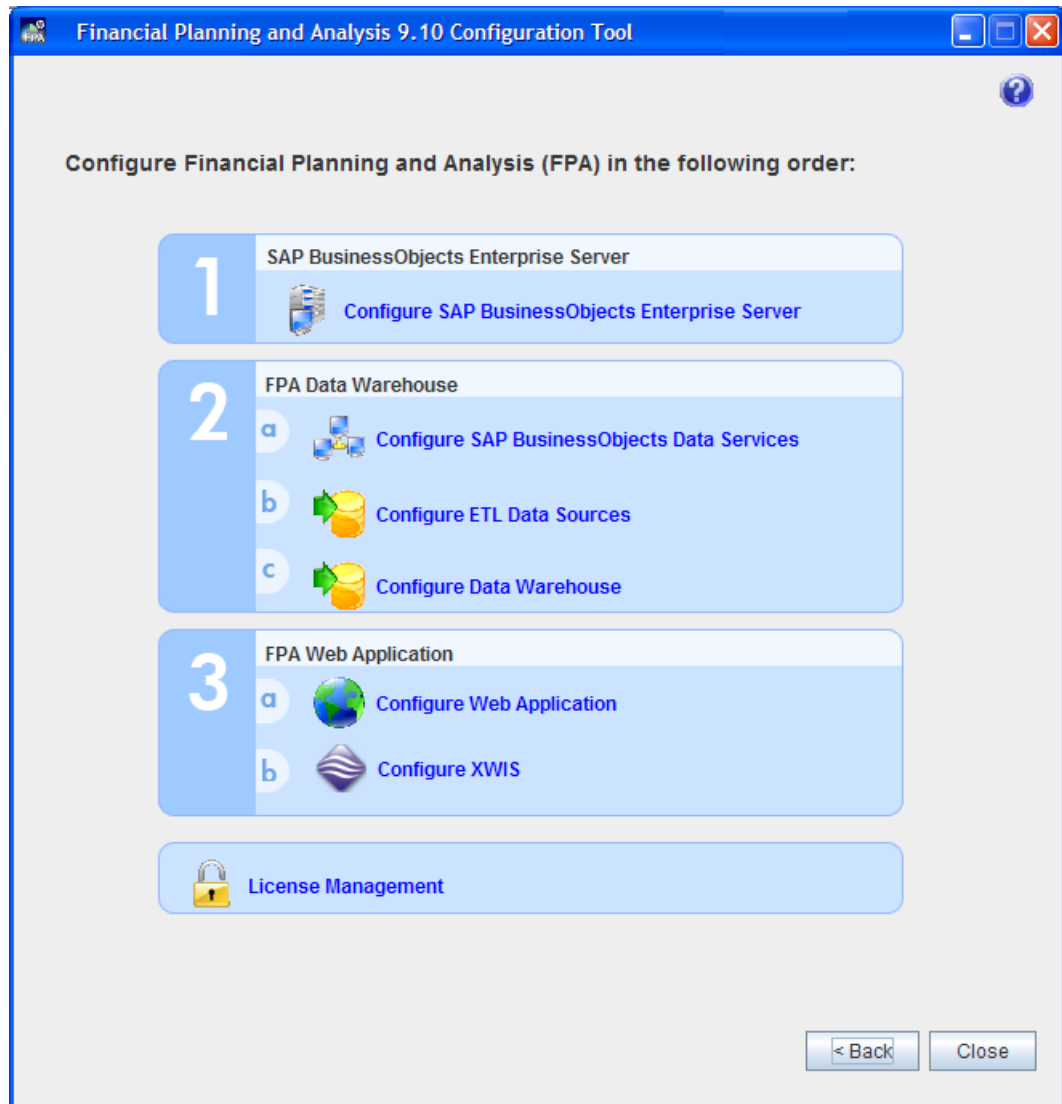
## Part 2a: Configure SAP BusinessObjects Data Services

- 1 From the Configuration Tool main menu, shown in [Figure 11](#) on page 58, select **Configure SAP BusinessObjects Data Services**.
- 2 On the **Install Directory** tab, specify the installation path and click **Next**.
  - ▶ • The installation path must not be in the same directory as Financial Planning & Analysis.
  - If you do not specify **\bods** as a subdirectory of your installation path, the configuration tool will create one for you and place all bods files in this subdirectory.
  - Make sure that the number of characters in the directory structure path does not exceed the maximum 39 characters that SAP BusinessObjects permits.
- 3 Now you must specify the same database connection and login information that you used to build the BODS database on the RDBMS server and define the ODBC connections on the data warehouse server. Refer to the names that you specified in the [2a\) BODS Configuration Information](#) section of the Checklist on [page 116](#).

On the **Repository** tab, specify the server name, database name, login, and password.

- 4 Click **Verify Connection** to ensure that you have database connectivity, then click **Next**.
- 5 Click **Next** to review the configuration information.
- 6 Click **Run Configuration** to begin the file installation process.
- 7 Click **Finish** when the file installation process is complete. If an error occurs, see [Troubleshooting](#) on page 64.

**Figure 11 Configuration Tool**



## Verification

You can confirm that the BODS installation is successful.

- From the Windows Start menu, click **All Programs > BusinessObjects XI 3.1** to verify that there is a **BusinessObjects Data Services** program group.

- You should be able to start any of the applications listed in the BusinessObjects Data Services program group.

## Adding the BODS Database Connection

You must register the BODS database that you defined on the RDBMS server on the BODS Management Console before you can install the data warehouse files.

- 1 Restart the data warehouse server.
- 2 Click **All Programs > BusinessObjects XI 3.1 > BusinessObjects Data Services > Data Services Management Console**.
- 3 Type your login and password. The default login for BODS is **admin** and the default password is **admin**.
- 4 Click **Login**.
- 5 Select **Administrator**.
- 6 In the left navigation pane, expand **Management** and select **Repositories**.
- 7 In the main pane, click **Add**.

For the following steps, use the information that you recorded in the [2a\) BODS Configuration Information](#) section of the Checklist on [page 116](#).

- 8 Type the **Repository name** (the BODS registration name in the Checklist).
- 9 Choose the **Database type**. It should be `Microsoft_SQL_Server`.
- 10 If appropriate, select **Windows authentication**.
- 11 Type the **Machine name** (the BODS database server name in the Checklist).
- 12 Type the **Database port** (the BODS database TCP port number in the Checklist. 1433 is the default value).
- 13 Type the **Database name** (the BODS database name in the Checklist). The BODS database name cannot exceed 12 characters.
- 14 Type the **User name** (the BODS login in the Checklist).
- 15 Type the **Password** (the BODS password in the Checklist).
- 16 Click **Apply**.

The MS SQL Server default port number value is 1433. BODS verifies that a connection exists using the port number that you specify.

## Troubleshooting


If an error occurs, click **View Logs**. The Configuration Tool displays a BODS log file and the Configuration Tool log. Read each log message to identify the error and recommended corrective action.

## Part 2b: Configure ETL Data Sources

The ETL process automatically configures the data warehouse with AM or PPM data sources. Although you can select an alternate source, you must manually run a script to configure the data warehouse when you use only an alternate source.



If you select AM, PPM, or both data sources, the Alternate Data Source will be ignored. The Alternate Date Source option will take effect if it is the only option selected.

- 1 From the Configuration Tool main menu, shown in [Figure 10](#) on page 55, select **Configure ETL Data Sources**.
  - 2 On the Data Sources tab, select **Asset Manager 5.10/5.20** or **Project and Portfolio Management** (or both). You can also select **Alternate Source** with Asset Manager or Project and Portfolio Management. The Configuration Tool displays one or both tabs to specify the required configuration information. If you do not have AM or PPM as a data source, select **Alternate Source**.
    - For Asset Manager (or Asset Manager and Alternate Source):
      - Use the information that you recorded in [2b\) ETL Data Source Configuration Information for Asset Manager](#) in the Checklist on [page 116](#).
      - Go to [step 3](#).
    - For Project and Portfolio Management (or Project and Portfolio Management and Alternate Source):
      - Select the PPM version from the drop-down list.  
**Note:** To configure the PPM 9.10 data source, select PPM 8.00 and ensure that the Oracle 10g client is installed. In the Oracle JDBC library location field, link to the ojdbc14.jar that is in the Oracle 10g client. Place the connection information to PPM 9.10 in the Oracle 10g client tnsnames.ora file.
      - Use the information that you recorded in [2b\) ETL Data Source Configuration Information for Project and Portfolio Management](#) in the Checklist on [page 117](#).
-  You must use an Oracle 10g client JDBC library for the connection to verify.
- Go to [step 3](#).
- For Alternate Source, see [Using an Alternate Data Source](#) on this page.
- 3 For each data source, make sure that you click **Verify connection** before you proceed. If the Oracle connection fails, see [Troubleshooting](#) on page 62.
- 4 The Configuration Tool will capture time zone information if it can. If not, choose the time zone where the data source originates from the drop-down lists.
- 5 Click **Next** to review the configuration information.
- 6 Click **Run Configuration** to apply the data sources information.
- 7 Click **Finish** when the data sources information is complete. If an error occurs, see [Troubleshooting](#) on page 64.

## Using an Alternate Data Source

If you use an alternate data source, you must complete these steps before you begin Part 3 of the Configuration Tool.



Make sure that you have two databases created: one staging database and one target database. Each database must have an administrative user ID and password.

- 1 Navigate to the C:\Program Files\HP\FPA 9.10\Setup\Resources\Scripts folder.
- 2 Extract AlternateSourceConfig.zip to a folder on your system. For example, C:\Scripts
- 3 Create an external sources folder to stage the external source spreadsheets for the extract, transform, and load (ETL) process. The content of these flat files is important to the ETL workflow. For example, create the folder C:\EXTERNAL.
- 4 Open a Windows command line window.
- 5 Navigate to the cmd subdirectory under the folder where you extracted the contents. For example, C:\Scripts\cmd.
- 6 Run this command:  
AlternateSourceConfig.bat  
For example, C:\Scripts\cmd>AlternateSourceConfig.bat
- 7 At the prompt, type the value for these required parameters:
  - Staging Database Server Name
  - Staging Database Admin User ID
  - Staging Database Admin Password
  - Staging Database Name
  - Staging Database Password for User IDs to be created
  - Target Database Server Name
  - Target Database Admin User ID
  - Target Database Admin Password
  - Target Database Name
  - Target Database Password for User IDs to be created
- 8 After the batch file successfully runs, follow the instructions in [Check ODBC Connections](#) on page 63, and then open the Configuration Tool and go to Part 3 to complete the configuration. For more information, see [Part 3a: Configure the Web Application](#) on page 70.

## Troubleshooting

If an error occurs, click **View Logs**. The Configuration Tool displays a Windows Explorer view of all the data warehouse log files that contain information about the error, and the Configuration Tool log.

If a step in the data warehouse configuration fails, there is a reference in the Configuration Tool log to the related data warehouse log where the information about the failure appears. There may be references to other logs that are available in the same Windows Explorer window. Sort the list of logs by date and read them sequentially, starting from the most recent, for the source of the error and recommended corrective action.

### Oracle Connection Fails

The default authentication for the Oracle 10g client is set to use NT credentials. When the Oracle connection uses NT credentials instead of those supplied by the Configuration Tool, the connection test fails. Change the authentication option to include NONE in the sqlnet.ora file.

- 1 Open this file with a text editor:  
`<ORACLE_HOME>10.2.0\client_1\NETWORK\ADMIN\sqlnet.ora`
- 2 Edit the authentication services option to include **NONE**.  
`SQLNET.AUTHENTICATION_SERVICES= (NTS | NONE)`
- 3 Save and close the file.

### Oracle Client Configuration

If your installation of an Oracle 10g client does not set the TNS\_ADMIN or ORACLE\_HOME environment variable to point to TNSNAMES.ORA, the connection to the Oracle database through the TNS name will fail. You can use the Oracle Net Configuration Assistant to create the TNS entry. For more information, see your Oracle documentation.

After you create the environment variable, follow the steps in [Restarting the Data Warehouse Installation](#) on page 65.

## Part 2c: Configure the Data Warehouse

- 1 From the Configuration Tool main menu, shown in [Figure 10](#) on page 55, select **Configure Data Warehouse**.
- 2 Use the information that you recorded in [2c\) Data Warehouse Configuration Staging Database Information](#) and [2c\) Data Warehouse Configuration Target Database Information](#) in the Checklist on [page 117](#) and [page 118](#) to configure the data warehouse.
- 3 On the **Units of Measure** tab, provide the time and date constraints for ETL processing.
- 4 In a multiple server installation, confirm the data warehouse password on the **Server** tab.
- 5 On the **Staging** tab, provide the location of the External Sources files and the Asset Manager (AM) and Project and Portfolio Management (PPM) extraction files. If you do not know the file location, click **Browse**.
  - ▶ If AM is not configured, the AM folder location does not appear.
  - ▶ If PPM is not configured, the PPM folder location does not appear.

Follow these rules when you create folders:

- The maximum number of characters for the folder location is 200.
  - Folder locations must be on the same physical machine.
  - The folders must be unique.
- 6 Click **Next** to review the configuration information.
  - 7 Click **Run Configuration** to begin the data warehouse configuration process.
  - 8 Click **Finish** when the data warehouse configuration process is complete. If an error occurs, see [Troubleshooting](#) on page 64.

## Check ODBC Connections

The installation creates static user IDs for databases and universes. These IDs may conflict with the ones you configured. You must correct the universe and ODBC connection information to ensure that you have database access. For each universe, follow these steps.

- 1 From the Windows **Start** menu, click **All Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > Designer**.
- 2 Login with the appropriate credentials. Administrator is the default user name.
- 3 Click **File > Import**.
- 4 In the Import Universe dialog box, click **Browse** to locate the folder that contains the data warehouse universes.
- 5 Select a universe from the list of Available Universes.
- 6 Click **OK**. The selected universe should import successfully.
- 7 Click **File > Parameters**.
- 8 If you click **Test**, the connection fails and returns an error message.
- 9 Click **Edit**. At the Warning prompt, click **Yes** to change the connection information.
- 10 In the **Login Parameters [2/4]** dialog box, click **Next**.
- 11 In the Configuration Parameters dialog box, change these parameters.

**Table 4 Configuration Parameters**

Parameter	Value
Connection pool mode	Keep the connection for
Pool timeout	10
Array fetch size	10
Array bind size	5
Login timeout	600

- 12 Click **Next**.
- 13 Click **Finish**.
- 14 Click **OK**.
- 15 Click **File > Export** to save the changes back to the database.

- 16 Click **Continue**.
- 17 Click **OK** to complete the export process.
- 18 Click **OK** when the confirmation message appears.
- 19 Click **File > Close**.

When you finish updating the connection information, complete these steps for each connection.

- 1 From the Windows **Start** menu, click **Administrative Tools > Data Sources (ODBC)**.
- 2 Click the **System DSN** tab.
- 3 Choose one of these connections: ita\_admin, ita\_operations, itafpaqry.
- 4 Click **Configure**.
- 5 On the first dialog box, click **Next**.
- 6 Change the **Login ID** and **Password** to match the values in the following table.

**Table 5 Configuration Parameters**

This ODBC Connection	Uses This Login ID	For this Target Database
ita_admin	dwmetadata	Staging
ita_operations	dwabc	Staging
itafpaqry	itafpaqry	Target

Test each database to verify that you have connectivity.

## Troubleshooting

If an error occurs, click **View Logs**. The Configuration Tool displays a Windows Explorer view of all the data warehouse log files that contain information about the error, and the Configuration Tool log.

If a step in the data warehouse configuration fails, there is a reference in the Configuration Tool log to the related data warehouse log where the information about the failure appears. There may be references to other logs that are available in the same Windows Explorer window. Sort the list of logs by date and read them sequentially, starting from the most recent, for the source of the error and recommended corrective action.

### Database Collation Sequence

If you failed to specify the correct collation value for a staging or target database, you may have to return to the RDBMS to change that value. For more information, see [Task 4: Create the Required Databases](#) on page 26.

### BODS Registration

If you failed to register the BODS repository, you must complete that step first before you build the data warehouse. For more information, see [Adding the BODS Database Connection](#) on page 59.



## Restarting the Data Warehouse Installation

If an error occurs after you begin [Part 2c: Configure the Data Warehouse](#) on page 62, you must delete the data warehouse tables created during the installation and repeat some steps to configure the new databases.

On the RDBMS server:

- 1 From Microsoft SQL Server Management Studio, delete these databases:
  - bods  
The bods database will have a connection to a BODS repository. Make sure that you select the option to close that connection when you delete this database.
  - staging
  - target
- 2 Recreate these three databases and specify the correct collation sequence. For more information, see [Task 4: Create the Required Databases](#) on page 26.

On the data warehouse server:

- 3 From the Windows **Start** menu, click **All Programs > BusinessObjects Data Services > Data Services Repository Manager**.
- 4 Specify the following information about the bods database:
  - **Repository type.**
  - **Database type** (Microsoft SQL Server is the default value).
  - **Database server name.**
  - **Database name.**
  - Choose **Windows authentication** or specify the **User name** and **Password**.
  - Click **Create** to re-establish the connection between the BODS application and the bods database.
- 5 From the Windows **Start** menu, click **All Programs > BusinessObjects Data Services > Data Services Server Manager**.
- 6 Select **JobServer 1**.
- 7 Click **Restart**.
- 8 Repeat [Part 2c: Configure the Data Warehouse](#) on page 62.

## Working with Data Sources

Read this section if you have Financial Planning & Analysis 9.10 implemented with one data source, AM 5.10, AM 5.20, PPM 7 50, or PPM 8.00, and you want to add another data source or reconfigure Financial Planning & Analysis to use an upgraded data source.

## Add a data source

- 1 Back up the staging database, target database, and the SAP BusinessObjects Data Services XI 3.1 repository. For more information, see the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.
- 2 From the Windows **Start** menu, click **All Programs > HP > FPA 9.10 > Configuration Tool**.
- 3 From the Configuration Tool main menu, select **Configure ETL Data Sources**.
- 4 On the Data Sources tab, select **Asset Manager 5.10/5.20** or **Project and Portfolio Management**. The Configuration Tool displays one or both tabs to specify the required configuration information.
- 5 For Asset Manager, use the information that you recorded in [2b\) ETL Data Source Configuration Information for Asset Manager](#) in the Checklist on page 116.
- 6 For Project and Portfolio Management:
  - a Select the PPM version.
  - b Use the information that you recorded in [2b\) ETL Data Source Configuration Information for Project and Portfolio Management](#) in the Checklist on page 117.
- 7 For each data source, make sure that you click **Verify connection** before you proceed.
- 8 The Configuration Tool will capture time zone information if it can. If not, choose the time zone where the data source originates from the drop-down lists.
- 9 Click **Next** to review the configuration information.
- 10 Click **Run Configuration** to apply the data sources information.
- 11 Click **Finish** when the data sources information is complete. If an error occurs, see [Troubleshooting](#) on page 64.
- 12 Use the Configuration Tool to configure the data warehouse. For more information, see [Part 2c: Configure the Data Warehouse](#) on page 62.
- 13 Run ETL. For more information, see the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.

## Reconfigure Financial Planning & Analysis 9.10 to Use an Upgraded Data Source

- 1 Back up the staging database, target database, and the SAP BusinessObjects Data Services XI 3.1 repository. For more information, see the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.
- 2 Run the data warehouse clean-up utility to remove the staging and target data for all consolidated entities related to the specified data source:
  - a Switch to this directory:  
C:\Program Files\HP\FPA 9.10\Foundation\bin
  - b Run this command:  
dw\_cleandb.bat -option

where *option* is one or more of the following options:

<b>Option</b>	<b>Description</b>
-help	Display the command syntax.
-file <file>	File name for the list output.
-listonly	Only list the affected tables. Write the affected tables to a file but do not execute the SQL. If you use listonly without specifying a product file, Financial Planning & Analysis writes the list of tables to the dw_cleandb.log file in C:\Program Files\HP\FPA 9.10\ContentPacks\Core\Foundation\log.
-product <product>	Name of the product for which to clean the data from the database.



For example

```
dw_cleandb.bat -product AM
dw_cleandb.bat -product PPM
```

- 3 Recreate the BODS repository.
- 4 Delete the **entities\_integration.xml** file in this directory:  
C:\Program Files\HP\FPA 9.10\Foundation\conf
- 5 Delete this directory:  
C:\Program Files\HP\FPA 9.10\Foundation\etc\ABC
- 6 Delete this directory:  
C:\Program Files\HP\FPA 9.10\Foundation\etc\ETL
- 7 From the Windows **Start** menu, click **All Programs > HP > FPA 9.10 > Configuration Tool**.
- 8 From the Configuration Tool main menu, select **Configure ETL Data Sources**.
- 9 On the Data Sources tab, select **Asset Manager 5.10/5.20** or **Project and Portfolio Management**. The Configuration Tool displays one or both tabs to specify the required configuration information.
- 10 For Asset Manager, use the information that you recorded in [2b\) ETL Data Source Configuration Information for Asset Manager](#) in the Checklist on [page 116](#).
- 11 For Project and Portfolio Management:
  - a Select the PPM version.
  - b Use the information that you recorded in [2b\) ETL Data Source Configuration Information for Project and Portfolio Management](#) in the Checklist on [page 117](#).
- 12 For each data source, make sure that you click **Verify connection** before you proceed.
- 13 The Configuration Tool will capture time zone information if it can. If not, choose the time zone where the data source originates from the drop-down lists.
- 14 Click **Next** to review the configuration information.
- 15 Click **Run Configuration** to apply the data sources information.
- 16 Click **Finish** when the data sources information is complete. If an error occurs, see [Troubleshooting](#) on page 64.
- 17 Recreate the SAP BusinessObjects Data Services XI 3.1 repository and re-sync. For more information, see the SAP BusinessObjects Data Services XI 3.1 documentation.
- 18 Use the Configuration Tool to configure the data warehouse. For more information, see [Part 2c: Configure the Data Warehouse](#) on page 62.

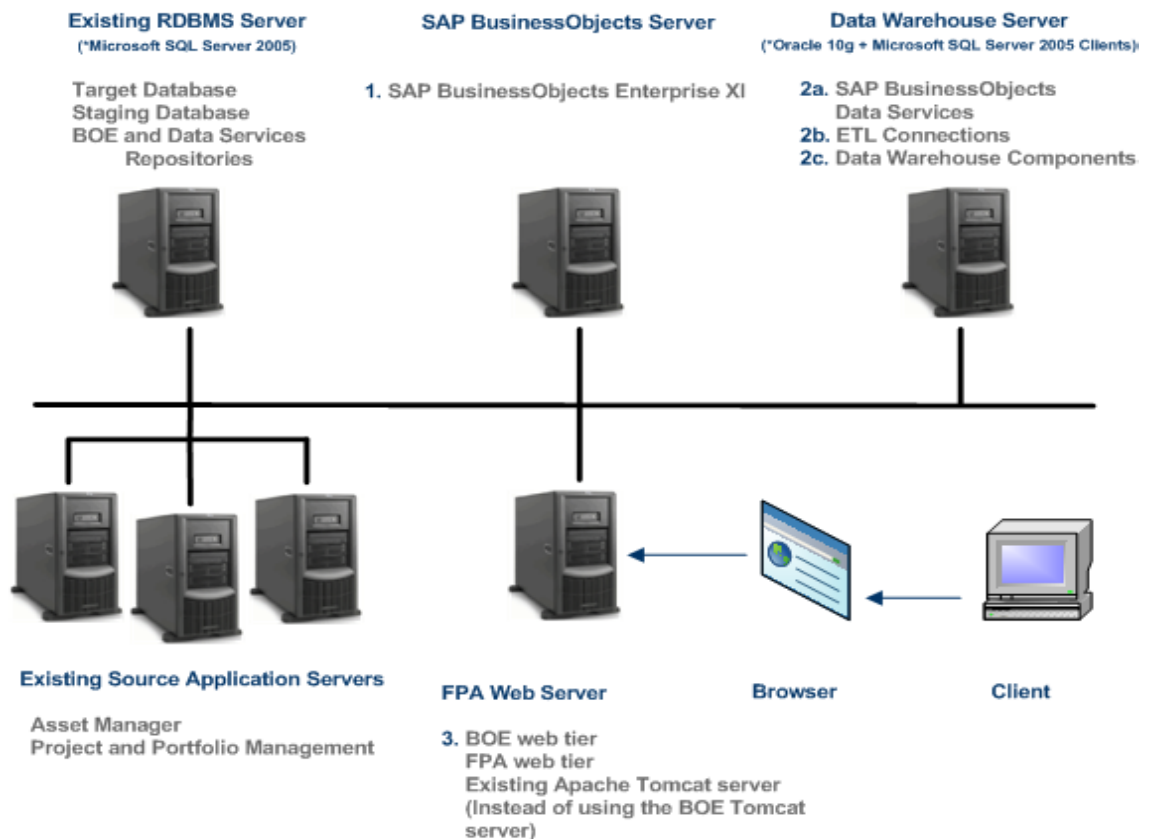
- 19 Run ETL. For more information, see the *HP Financial Planning & Analysis Data Warehouse Administration Guide*.

# 8 Installing the Web Application and Antivia XWIS

The final step is to install and configure the Financial Planning & Analysis (FPA) web application and the Antivia Xcelsius Web Intelligence Integration Suite (XWIS). At the end of this part of the installation process, the FPA web server contains the FPA web application. [Figure 12](#) shows how the web application displays in a browser window on a client workstation. Complete these tasks on the FPA web server.

- [Part 3a: Configure the Web Application](#) on page 70.
- [Part 3b: Configure XWIS](#) on page 74.
- [Restart Tomcat](#) on page 75.
- [Start the Web Application](#) on page 75.

**Figure 12** FPA Environment





At the end of the installation, you should be able to see the startup page of the Financial Planning & Analysis web application in a browser window. You must complete the authentication procedures described in [Chapter 9, Configuring User Roles and Authentication](#) before you can login and run the application.

## Part 3a: Configure the Web Application

**Consolidated Server:** Complete [step 12](#) on page 71 through [step 21](#) on page 73 on the consolidated server.

**Multiple Servers:** From the web application server, follow all steps below.

- 1 If necessary, complete the steps to copy and import the license file. For more information, see [Porting the License File](#) on page 35.
- 2 Insert the Financial Planning & Analysis media into the DVD/CD-ROM drive.
- 3 Double-click **HP\_FPA\_910.msi**.
- 4 Complete the **Welcome** tasks.
- 5 Choose **Custom** as the Setup Type to install only the **Web Application**.
  - a Click the down arrow beside **SAP BusinessObjects Enterprise Server**.
  - b From the menu, select **Entire feature will be unavailable**.
  - c Click the down arrow beside **Data Warehouse Environment**.
  - d From the menu, select **Entire feature will be unavailable**.Only the **Web Application** will be installed on this machine.
- 6 Confirm the installation path and click **Next**. The Financial Planning & Analysis installer copies the required files from the installation media.
- 7 Click **Finish** to start the Configuration Tool.
- 8 If you are installing the web application in a distributed environment that uses an external (non-BOE Tomcat) Tomcat, stop Tomcat.
  - a From the Windows **Start** menu, click **Programs > Control Panel > Administrative Tools > Services**.
  - b Right-click the Apache Tomcat service and select **Stop**.
- 9 When you begin the configuration process, the first task is to specify the location of the license file. Click **Browse** to locate the license file path that you specified in the [Part 3: Financial Planning & Analysis Web Application and Antivia XWIS Checklist](#) on page 120.

 **License Management** 

Select the license file to import.

License file:

Currently installed modules:

Modules	License Type

- 10 Click **Import License** to store the license details and expiration dates.

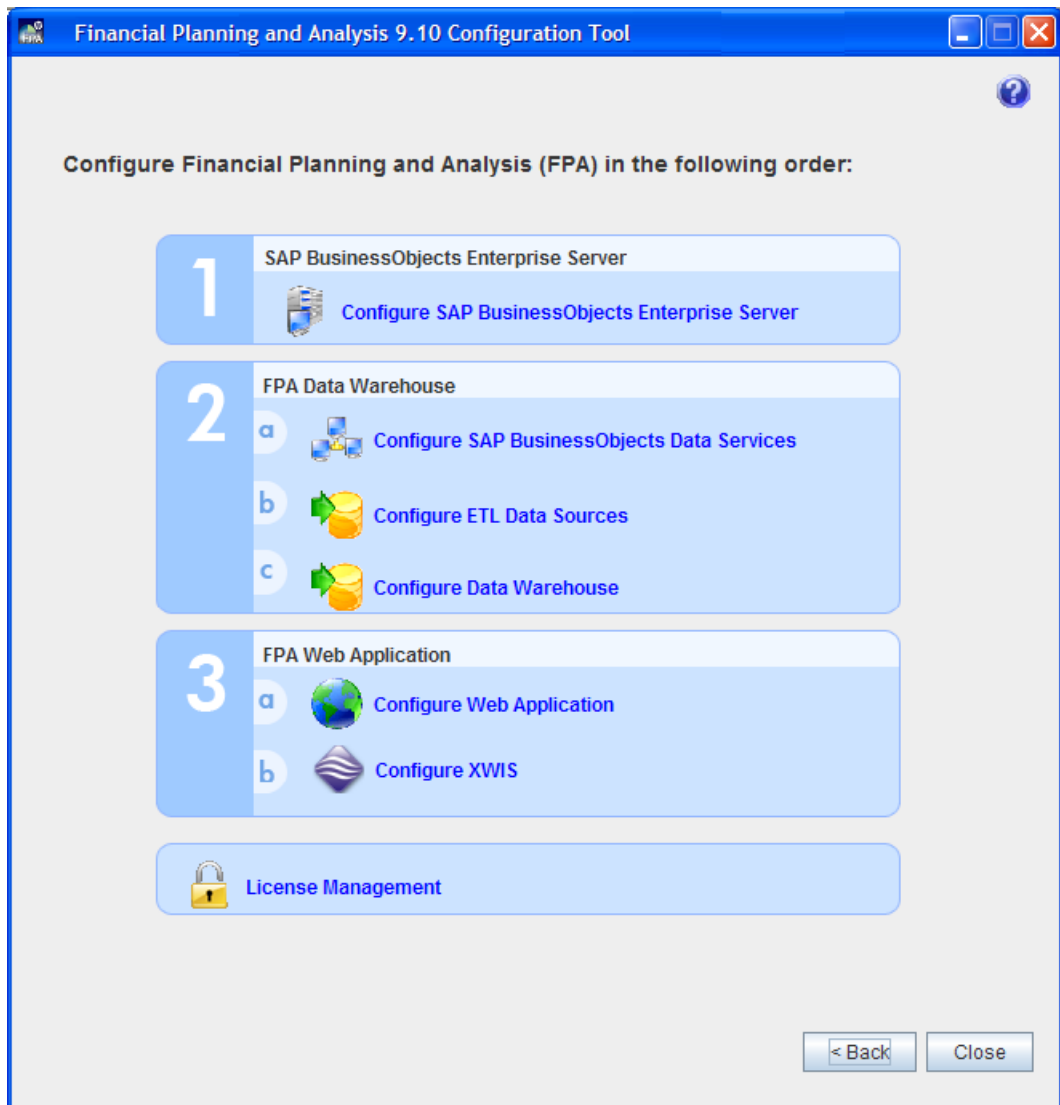
 **License Management** 

Select the license file to import.

License file:

- 11 Click **Run Configuration** to proceed with configuring the Financial Planning & Analysis component.
- 12 From the Configuration Tool main menu, shown in [Figure 13](#), select **Configure Web Application**.

**Figure 13 Configuration Tool**



- 13 The **Tomcat** tab enables you to specify a pre-existing (external) Tomcat that is not created by the Financial Planning & Analysis BOE installation. Financial Planning & Analysis can use an external Tomcat if it has the **Location** and **Service name**.
- 14 Complete these fields on the **SAP BOE** tab.
  - **SAP BOE server name:** Establish a web service session between the Financial Planning & Analysis application and BOE. You must use the fully qualified domain name for the BOE server name. For example, **boeservername.americas.hp.com**.
  - **Install directory:** Specify where to install the SAP BusinessObjects Enterprise Web Tier.
- 15 On the **FPA Application** tab, choose one of the following options. Refer to the target/itaapp configuration information that is recorded in the [3a\) Financial Planning and Analysis \(FPA\) Application Information](#) on page 120.
  - Select **Simple Connection** to specify the database server name, target database name, login, and password.

or



- Select **JDBC URI (Advanced)** to specify the database URI.
- 16 Click **Verify Connection** to ensure that you have database connectivity, then click **Next**.
- 17 Click **Next** to review the configuration information.
- 18 Click **Run Configuration** to begin the file installation process.
- 19 When the installation is complete, click **Main Menu**.
- 20 Update Java memory options.
  - a From the Windows **Start** menu, click > **All Programs** > **Tomcat** > **Tomcat Configuration**.
  - b Click the **Java** tab.
  - c Add these memory settings to **Java Options**:
    - Xmx1024m
    - XX:MaxPermSize=256m
  - d Click **Apply** and **OK**.
- 21 Start Tomcat.
  - a From the Windows **Start** menu, click **Programs** > **Control Panel** > **Administrative Tools** > **Services**.
  - b Right-click the Apache Tomcat service and select **Start**.
- 22 Using a text editor, type the remote BOE server name in the **domain** property of this file:
  - C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\dswsbobje
  - \WEB-INF\classes\dsws.properties

## Tomcat Session Time out Parameters

The default time out value for BOE applications is 20 minutes. To extend the session time out parameter for the applications and for Tomcat, follow these steps.

- 1 Stop the Tomcat service.
- 2 Open this file with a text editor:
 

```
<bo_install_dir>\boe\Tomcat55\webapps\dswsbobje\WEB-INF\classes\dsws.properties
```
- 3 Add this property at the end of the file. Express the time out value in seconds. For example, a session time-out value of 24 hours would be
 

```
# Session timeout
session.timeout=86400
```
- 4 Save and close the file.
- 5 Open this file with a text editor:
 

```
<bo_install_dir>\boe\Tomcat55\conf\server.xml
```
- 6 Update the connectionTimeout property for port 8080 in server.xml to match the value that you specified in dsws.properties, but express the timeout value for the Tomcat instance in milliseconds. For example, this is a session timeout value of 24 hours:
 

```
connectionTimeout=86400000
```
- 7 Save and close the file.
- 8 Restart the Tomcat service.

## Troubleshooting

If you need to re-install the Financial Planning & Analysis application, follow these steps.

- 1 Stop the Tomcat service.
- 2 From the Windows **Control Panel**, select **Add/Remove Programs**.
- 3 Remove HP Financial Planning & Analysis 9.10.
- 4 Repeat [step 2](#) on page 70 through [step 19](#) on page 73.

### Java Memory Options

If the web application fails to start, check for an `OutOfMemoryError` message in the log. For example:

```
SEVERE: Context [/FPA] startup failed due to previous errors
...
java.lang.OutOfMemoryError: PermGen space
```

This issue might be due to the heap size available to the Java virtual machine used by Apache Tomcat. For more information, see [Java Memory Options](#) on page 18.

## Part 3b: Configure XWIS

The Antivia database is an empty database that you must manually create before running this step. When you configure the database, record the information in the [3b\) XWIS Configuration Information](#) section of the Checklist on [page 121](#).

To install and configure Antivia Xcelsius Web Intelligence Integration Suite (XWIS), set up connections to the XWIS database.

- 1 From the Configuration Tool main menu, click **Configure XWIS**.
- 2 On the **XWIS** tab, use the information that you recorded in the [3b\) XWIS Configuration Information](#) section of the Checklist on [page 121](#) to provide these details:
  - **Server name:** Type the name of the server where the XWIS database resides.
  - **Database name:** Type the name of the XWIS database.
  - **Login:** Type the name that you use to log in to the XWIS database.
  - **Password:** Type the password that you use to access the XWIS database.
  - **Confirm password:** Retype the password.
- 3 Click **Verify Connection** to test the connection to the XWIS database.
- 4 Click **Next** to review your Antivia XWIS installation and configuration settings and complete the configuration.
- 5 On the **Review** tab, review your settings for the XWIS database. If you receive errors or need to make changes, click the appropriate tab, make the changes, and then return to the Review tab to complete the XWIS configuration.
- 6 Click **Run Configuration**. The Configuration Tool installs and configures Antivia XWIS and populates the XWIS database.

**Note:** Several exceptions will appear in the Config log file after the configuration. The error messages are expected and indicate that the XWIS database has been populated for the first time. For example:

```
com.microsoft.sqlserver.jdbc.SQLServerException: Invalid object name 'ENTVERSION'.
at com.microsoft.sqlserver.jdbc.SQLServerException.makeFromDatabaseError(Unknown Source)
at com.microsoft.sqlserver.jdbc.SQLServerStatement.getNextResult(Unknown Source)
at com.microsoft.sqlserver.jdbc.SQLServerStatement.doExecuteStatement(Unknown Source)
at com.microsoft.sqlserver.jdbc.SQLServerStatement$StmtExecCmd.doExecute(Unknown Source)
at com.microsoft.sqlserver.jdbc.TDSCommand.execute(Unknown Source)
at com.microsoft.sqlserver.jdbc.SQLServerConnection.executeCommand(Unknown Source)
at com.microsoft.sqlserver.jdbc.SQLServerStatement.executeCommand(Unknown Source)
at com.microsoft.sqlserver.jdbc.SQLServerStatement.executeStatement(Unknown Source)
at com.microsoft.sqlserver.jdbc.SQLServerStatement.executeQuery(Unknown Source)
at com.antivia.configtool.model.DBConnectionInfo.getCurrentVersion(DBConnectionInfo.java:311)
at com.antivia.configtool.ui.ConfigTool.createAndShowGUI(ConfigTool.java:97)
at com.antivia.configtool.ui.ConfigTool.access$100(ConfigTool.java:33)
at com.antivia.configtool.ui.ConfigTool$2.run(ConfigTool.java:173)
at java.awt.event.InvocationEvent.dispatch(Unknown Source)
at java.awt.EventQueue.dispatchEvent(Unknown Source)
at java.awt.EventDispatchThread.pumpOneEventForHierarchy(Unknown Source)
at java.awt.EventDispatchThread.pumpEventsForHierarchy(Unknown Source)
at java.awt.EventDispatchThread.pumpEvents(Unknown Source)
at java.awt.EventDispatchThread.pumpEvents(Unknown Source)
at java.awt.EventDispatchThread.run(Unknown Source)
```

- 7 Click **Main Menu** to return to the Configuration Tool main menu.

## Restart Tomcat

After you complete the Web Application and XWIS installation and configuration, HP recommends that you restart Apache Tomcat to ensure that the application deploys correctly.

- 1 From the Windows **Start** menu, click **Programs > Control Panel > Administrative Tools > Services**.
- 2 Right-click the Apache Tomcat service and select **Stop**.
- 3 Delete all of the contents in the Tomcat work folder:  
`<bo_install_dir>\Tomcat55\work`
- 4 Right-click the Apache Tomcat service and select **Start**.

## Start the Web Application

Type this URL to start the Financial Planning & Analysis application:

`http://server_name:8080/FPA/`

**Note:** Port 8080 is the default port number. If you use an external Tomcat, make sure that you use the correct port number of that Tomcat to access the Financial Planning & Analysis application.

You can display the login window, but you will not be able to log into the application until you configure user authentication that is consistent with your security requirements. In an enterprise environment, user profiles are usually managed through Lightweight Directory

Access Protocol (LDAP) or Windows Active Directory (AD) authentication. For more information, see [Chapter 9, Configuring User Roles and Authentication](#). For isolated installations, or test environments, file based authentication may be appropriate. For more information, see [Appendix B, Setting Up File Based Authentication](#).

## 9 Configuring User Roles and Authentication

Financial Planning & Analysis security models use predefined access levels and security roles. Administrators must grant access rights to the groups and security roles using the BOE Central Management Console (CMC).

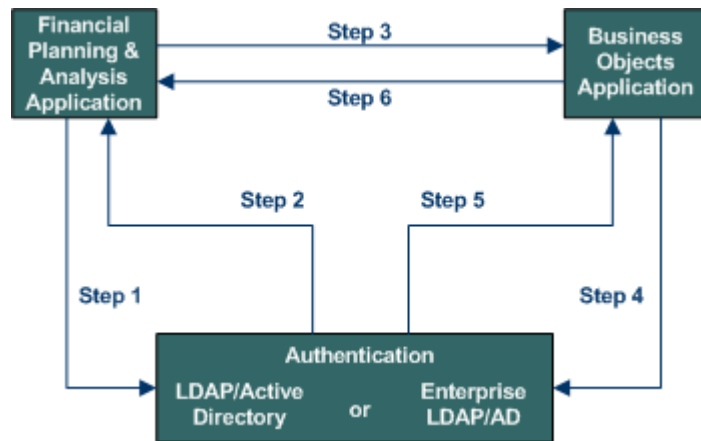
Financial Planning & Analysis supports Lightweight Directory Access Protocol (LDAP) or Windows Active Directory (AD) authentication. Administrators can configure the Common Web Client (CWC) to enable LDAP. The BI Authentication Processing filter validates users and groups.

File based security is a quick way to set up authentication for proof-of-concept, demo, or prototype installations. It is not recommended in a production environment. For more information, see [Appendix B, Setting Up File Based Authentication](#).

### Authentication Model

The Authentication process involves the Financial Planning & Analysis application and BOE. Whether you install BOE with Financial Planning & Analysis, or you use an existing BOE server, you must complete the required authentication configuration. The authentication process consists of these steps:

- 1 The Financial Planning & Analysis application passes the user name and password to the authentication source (LDAP or AD). This step uses the `jaas.config` and `applicationContext.xml` files.
- 2 The Authentication Source replies with the user name and attribute details.
- 3 The Financial Planning & Analysis application passes the information received in Step 2 to BOE. This action starts the second phase of the authentication process and references the `web.xml` file.
- 4 BOE queries the Authentication Source with the user name and password.
- 5 BOE receives authorization from the Authentication source.
- 6 BOE passes a session ID to the Financial Planning & Analysis application.



Before you begin, make sure that you have access to your local LDAP or Active Directory servers and consult your BOE documentation. Follow the [Authentication Checklist](#) to complete the authentication tasks. If you want to configure simple authentication, see [Appendix B, Setting Up File Based Authentication](#).

## Authentication Checklist

Print this checklist to use during the installation process. As you complete each task, mark it finished. Complete these tasks on the LDAP or Active Directory server.

- [Task 1: Create Financial Planning & Analysis Users and Groups on page 79.](#)

### If You Choose LDAP Authentication

- [Task 2a: Configure LDAP Authentication on page 80.](#)
  - Step 1: Configure LDAP on the BOE Central Management Console on page 80.
  - Step 2: Add User Groups on the BOE Central Management Console on page 81.
  - Step 3: Configure the LDAP Options on the BOE Central Management Console on page 81.
  - Step 4: Test BOE Central Management Console Configuration Access on page 81.
  - Step 5: Modify the web.xml File on page 82.
  - Step 6: Modify the applicationContext.xml File on page 82.
  - Step 7: Modify the jaas.config File on page 83.
  - Step 8: Test InfoView Access on page 83.

### If You Choose Active Directory Authentication

- [Task 2b: Configure Active Directory Authentication on page 84.](#)
  - Step 1: Enable Active Directory on the BOE Central Management Console on page 84.
  - Step 2: Configure Administration Credentials on the BOE Central Management Console on page 85.

- Step 3: Add Member Groups on the BOE Central Management Console on page 85.
- Step 4: Choose Kerberos Authentication Options on page 85.
- Step 5: Choose Active Directory Authentication Options on page 86.
- Step 6: Test BOE Central Management Console Configuration Access on page 86.

## Finishing Authentication Tasks for Active Directory

- [Task 3: Configure JAVA Authentication for Active Directory on page 87.](#)
  - Step 1: Create a krb5.ini File on page 87.
  - Step 2: Create a bscLogin.conf File on page 87.
  - Step 3: Modify the web.xml File on page 87.
  - Step 4: Modify the applicationContext.xml File on page 88.
  - Step 5: Modify the jaas.config File on page 88.
  - Step 6: Test the Active Directory Connection on page 89.
- [Task 4: Configure Tomcat for Active Directory on page 89.](#)
  - Step 1: Specify the krb5.ini and bscLogin.conf File Locations on page 89.
  - Step 2: Edit Authentication Parameters on page 90.
  - Step 3: Test InfoView Access on page 90.

## Final Steps

- [Task 5: Configure BOE Access Rights on page 91.](#)
  - Step 1: Enable Access to the FPA Analytics and FPA Dashboard Folders on page 91.
  - Step 2: Enable Access to the DW Administration and DW Operations Folders on page 92.
  - Step 3: Enable Access to the Root Folder on page 92.
  - Step 4: Enable Users to Refresh Reports on page 93.
- [Task 6: Test Authentication on page 94.](#)

## Task 1: Create Financial Planning & Analysis Users and Groups

You must configure the LDAP or Active Directory host before you make configuration changes to BusinessObjects Enterprise XI. This includes adding Financial Planning & Analysis out-of-box groups and your own groups to the LDAP or Active Directory server. Changes to group names require changes to both the web.xml file and the LDAP or Active Directory server.

Financial Planning & Analysis (FPA) recognizes the following out-of-box groups.

**Table 6 User Groups**

Group Name	Group User Role	Read/Write Application Rights
<b>FPA_ANALYTIC</b>	FPA analytic designer or user	<ul style="list-style-type: none"> <li>• Dashboards</li> <li>• Reports</li> <li>• Tools</li> </ul>
<b>FPA_CE_CONFIG</b>	FPA user	<ul style="list-style-type: none"> <li>• Allocations (read only)</li> <li>• Dashboards</li> <li>• Reports</li> <li>• Tools</li> </ul>
<b>FPA_ADMIN</b>	FPA administrator or super user	<ul style="list-style-type: none"> <li>• Allocations</li> <li>• Dashboards</li> <li>• Reports</li> <li>• Admin</li> <li>• Tools</li> </ul>
<b>DW_ADMIN</b>	Data warehouse administrator	<ul style="list-style-type: none"> <li>• Admin</li> <li>• Tools</li> </ul>

If you create these groups and assign the user name **ituser** to each one on the LDAP or Active Directory server, you will be able to log in to the Financial Planning & Analysis application. Make sure that you also assign the appropriate access rights within BOE for these users; otherwise, they will be unable to refresh reports. For more information, see the BOE documentation.

## Task 2a: Configure LDAP Authentication

Before you define and enable LDAP authentication, create an LDAP server and ensure that your LDAP directory is valid. For more information, see your LDAP documentation.



Ensure that all users have a valid password. Financial Planning & Analysis does not support blank passwords for users.

Complete the following steps to configure the host, Secure Socket Layer authentication, LDAP mapping options, and LDAP groups.

### Step 1: Configure LDAP on the BOE Central Management Console

- 1 Click **Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**.
- 2 Log in with your user name and password.
- 3 Click **Authentication**, then click the **LDAP** tab.
- 4 Click **Start LDAP Configuration Wizard**.
- 5 In the **Add LDAP Host (hostname: port)** field, type your host and port information.



- 6 Click **Add**.
- 7 Click **Next**.
- 8 In the **LDAP Server Type** drop-down list, select your server, and click **Next**.
- 9 In the **Base LDAP Distinguished Name** field, type the distinguished name and click **Next**.
- 10 Type the LDAP host credentials:
  - In **LDAP Server Administration Credentials**, type the distinguished name and password for a user account that has rights to administer your LDAP server.
  - In **LDAP Referral Credentials**, type the same distinguished name and password you entered for LDAP Server Administration Credentials.
- 11 In the **Maximum Referral Hops** field, type the number of referral hops to limit forwarding the credential request. If you set this field to zero, no referral hops are allowed.
- 12 Click **Next**.
- 13 From the **Type of SSL authentication** drop-down list, select **Basic (no SSL)** and click **Next**.
- 14 From the Authentication drop-down list, select **Basic (no SSO)** and click **Next**.

## Step 2: Add User Groups on the BOE Central Management Console

- 1 Click **Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**.
- 2 Log in with your user name and password.
- 3 Click **Authentication**, then click the **LDAP** tab.
- 4 In **Mapped LDAP Member Groups**, add each out-of-box group listed in [Table 6](#) on page 80 in the **Add LDAP group (by cn or dn)** field.
- 5 Click **Add**.
- 6 Click **Update**.
- 7 Repeat [step 4](#) through [step 6](#) to add another group.
- 8 To remove a group, select the group entry, click **Delete**, then click **Update**.


## Step 3: Configure the LDAP Options on the BOE Central Management Console

- 1 Select the following LDAP options:
  - **Create a new account for every added LDAP alias**
  - **Create new aliases only when the user logs on**
  - **New users are created as named users**
- 2 Click **Next**.
- 3 Click **Finish**.

## Step 4: Test BOE Central Management Console Configuration Access

- 1 Click **Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**.

- 2 To log in:
  - a Type your user name and password.
  - b From the Authentication drop-down menu, select **LDAP**.

 No navigation items are available because the groups do not have rights.
- 3 If the login fails, repeat Step 1 through Step 3 in Task 2a on [page 80](#).

## Step 5: Modify the web.xml File

- 1 Open this file with a text editor:  
C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\web.xml
- 2 Locate the **biAuthType** parameter section. This section is commented out for file-based authentication. You must uncomment the context-param part of this section to configure LDAP authentication.
 

```

<!-- BO authentication method:
        secEnterprise (file based)
        secLDAP (LDAP),
        secWinAD (Active Directory)
Default is secEnterprise if this param is not set
<context-param>
    <param-name>biAuthType</param-name>
    <param-value>secEnterprise</param-value>
</context-param>
-->
```
- 3 Uncomment the context-param by moving the --> so that it is placed before the context-param element:
 

```

<!-- BO authentication method:
        secEnterprise (file based)
        secLDAP (LDAP),
        secWinAD (Active Directory)
Default is secEnterprise if this param is not set -->
<context-param>
    <param-name>biAuthType</param-name>
    <param-value>secEnterprise</param-value>
</context-param>
```
- 4 Change the parameter value to **secLDAP**. The result should look like this:
 

```

<context-param>
    <param-name>biAuthType</param-name>
    <param-value>secLDAP</param-value>
</context-param>
```
- 5 Save and close the file.

## Step 6: Modify the applicationContext.xml File

- 1 Open this file with a text editor:

C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\applicationContext.xml

- 2 Locate the **loginContextName** property in the **jaasAuthenticationProvider** section.
- 3 Change the parameter value to **dpJndi**. The result should look like this:

```
<bean id="jaasAuthenticationProvider"
class="org.acegisecurity.providers.jaas.JaasAuthenticationProvider">
  <property name="loginConfig" value="/WEB-INF/jaas.config"/>
  <property name="loginContextName" value="dpJndi"/>
  ...
</bean>
```

- 4 Save and close the file.

## Step 7: Modify the jaas.config File

- 1 Open this file with a text editor:

C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\jaas.config

- 2 Locate the **dpJndi** section.
- 3 Change the parameter values to your local values. Verify whether the specified parameter values have case sensitivity restrictions.

The result should look like this:

```
dpJndi {
  com.hp.ov.cwc.security.jaas.JndiLoginModule required
  ldap.server.url="ldap://server.name.com:ort_number"
  manager.dn="uid=admin,ou=administrators,dc=my,dc=server,dc=com"
  manager.password="password_value"
  user.search.base="dc=labs,dc=peregrine,dc=com"
  user.search.filter="(&(uid=<0>)(objectClass=person))"
  group.search.base="ou=groups,dc=labs,dc=peregrine,dc=com"
  group.search.filter="(&(uniqueMember=<0>)(objectClass=groupOfUniqueNames))";
};
```

where any value shown in *italics* is replaceable with a valid local value. For more information about the settings, see the sample jaas.config file on the installation media.

- 4 Save and close the file.

## Step 8: Test InfoView Access

- 1 Click **Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise JavalnfoView**.
- 2 To log in:
  - a Type the user name and password that you used in [Step 4: Test BOE Central Management Console Configuration Access](#) on page 81.
  - b From the Authenticationdrop-down menu, select **LDAP**.

3 If the login fails, repeat Step 1 through Step 3 in Task 2a [page 80](#).



At this time, you can assign appropriate access rights for users to enable them to refresh reports.

## Task 2b: Configure Active Directory Authentication

Windows Active Directory is an optional method of authentication. Before you set up and enable Active Directory authentication, make sure that you have the correct domain and group information and that you have a user account on the Business Objects server that enables you to authenticate administrative users and groups.



Ensure that all users have a valid password. Financial Planning & Analysis does not support blank passwords for users.

You can avoid initial configuration issues by following these suggestions:

- Use the default Financial Planning & Analysis groups. You can add custom groups after you successfully confirm the connection.
- Ensure that the Active Directory groups are Security Groups and not Distributed Groups.
- Financial Planning & Analysis Active Directory authentication does not support multiple users across multiple domains. You can use InfoView to create and view reports.
- For initial testing, make sure that users are in the base directory that is specified in Business Objects and the URL of the jaas.config file.
- Do not use Secure Socket Layer during the initial configuration. You can add this option after you confirm authentication on port 389.

When you create a Security Principal user, follow these suggestions:

- Ensure that this user is a member of the Domain Users group with rights to search all users.
- Assign this user to the same Active Directory container as other users who will be trying to authenticate.
- Verify that this user has DES encryption set and that the password has not expired.
- Ensure that you do not select the **do not require Kerberos preauthentication** option for the Security Principal user.
- Add the Security Provider user to the default Financial Planning & Analysis groups for initial testing with the Security Principal to confirm successful authentication.

### Step 1: Enable Active Directory on the BOE Central Management Console

- 1 On the Business Objects server, ensure that the Central Management Server is running.
- 2 Click **Start > Programs > BusinessObjects XI Release 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**.
- 3 Type your **User Name**, **Password**, and click **Log On**.
- 4 In the **Manage** section, click **Authentication**.
- 5 Click the **Windows AD** tab.

- 6 If necessary, select **Windows Active Directory Authentication is enabled**.

## Step 2: Configure Administration Credentials on the BOE Central Management Console

Administration credentials enable a Business Objects user to use Active Directory authentication, map groups, check rights, and perform other tasks.

- 1 Click the value for the **AD Administration Name** to change it.
- 2 Type the **Name** and **Password** of the domain user account configured on your Active Directory server. Business Objects Enterprise will use this name and password to authenticate Active Directory users and groups. Use one of these formats:
  - NT name (DomainName\UserName). For example:  
server.domain.com\dc\_administrator
  - User Principal Name (UPN) (user@DNS\_domain\_name). For example:  
dc\_administrator@DNS\_domain.com
- 3 Type the **Default AD Domain** value. You must specify a default domain to enable Active Directory authentication and to map groups. For example:  
server.domain.com
  - ▶ If you specify the Default AD Domain name, users do not have to specify the Active Directory domain name when they log in to Business Objects Enterprise with Active Directory authentication.
- 4 Click **Update**.

## Step 3: Add Member Groups on the BOE Central Management Console

- 1 Type the group name in the **Add AD Group (Domain\Group)** field in this format:  
*DomainName\GroupName*  
For example:  
*server.domain\FPA\_Admin*
- 2 Click **Add**.
- 3 Repeat the following steps for each out-of-box group name described in [Table 6](#) on page 80.
- 4 When you finish adding all groups, click **Update**.

## Step 4: Choose Kerberos Authentication Options

- 1 Select **Use Kerberos authentication**.
- 2 Select **Cache security context (required for SSO to database)**.
- 3 Type the **Service principal name**. This should be the administrator user that you created in Step 2: Configure Administration Credentials on the BOE Central Management Console on page 85. For example:  
ita\_administrator@DNS\_domain.com

## Step 5: Choose Active Directory Authentication Options

- 1 Choose these options.

**Table 7 Authentication Options**

Option	Description
<b>Assign each added AD alias to an account with the same name</b>	Use this option when you know users have an existing enterprise account with the same name. Active Directory aliases are assigned to existing users if auto alias creation is active. Users who do not have an existing enterprise account, or who do not have the same name in their enterprise and Active Directory account, are added as new Active Directory users.
<b>New aliases will be added and new users will be created</b>	Choose this option to automatically create a new alias for every Active Directory user mapped to Business Objects Enterprise.
<b>New users are created as named users</b> or <b>New users are created as concurrent users</b>	Choose this option for Named User licenses.  or Choose this option for Processor licenses.

- ▶ New Active Directory accounts are added for users without Business Objects Enterprise accounts, or for all users if you selected the **Create a new account for every added AD alias** option.

- 2 Click **Update**. A message appears stating that it will take several seconds to update the member groups.
- 3 Click **OK**.

## Step 6: Test BOE Central Management Console Configuration Access

- 1 Click **Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**.

- 2 To log in:

- a Type your user name and password.
- b From the Authentication drop-down menu, select **Windows AD**.

- ▶ No navigation items are available because the groups do not have rights.

- 3 If the login fails, repeat Step 1 through Step 3 in Task 2b on [page 84](#).

## Task 3: Configure JAVA Authentication for Active Directory

BOE uses a Java authentication module called Krb5AuthLoginModule. This log-in module requires some additional configuration information. There are two configuration files, krb5.ini and bscLogin.conf.

By default, the Java SDK automatically looks for these configuration files in C:\winnt folder even if this folder does not exist. You can create the files in the C:\winnt folder, or in any other folder.

### Step 1: Create a krb5.ini File

This file gives Java information about your domain and location of the Kerberos Key Distribution Center. This file can be simple or complex depending on the size and implementation of your Active Directory domain.

For example:

```
[libdefaults]
default_realm = DOMAIN.COM
dns_lookup_kdc = true
dns_lookup_realm = true
[realms]
DOMAIN.COM = {
kdc = ADSERVER.DOMAIN.COM
default_domain = DOMAIN.COM
}
```

### Step 2: Create a bscLogin.conf File

The bscLogin.conf file is the JAAS log-in configuration file. It contains an entry that specifies the authentication technology to be used. When you use the SUN Java SDK, the entry looks like this:

```
com.businessobjects.security.jgss.initiate {
com.sun.security.auth.module.Krb5LoginModule required;
};
```

### Step 3: Modify the web.xml File

- 1 Open this file with a text editor:

C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\web.xml

- 2 Locate the **biAuthType** parameter section. This section is commented out for file-based authentication. You must uncomment the context-param part of this section to configure AD authentication.

```
<!-- BO authentication method:
    secEnterprise (file based)
    secLDAP (LDAP),
    secWinAD (Active Directory)
Default is secEnterprise if this param is not set
<context-param>
    <param-name>biAuthType</param-name>
```

```

        <param-value>secEnterprise</param-value>
    </context-param>
-->

```

- 3 Uncomment the context-param by moving the --> so that it is placed before the context-param element:

```

<!-- BO authentication method:
    secEnterprise (file based)
    secLDAP (LDAP),
    secWinAD (Active Directory)
Default is secEnterprise if this param is not set -->
<context-param>
    <param-name>biAuthType</param-name>
    <param-value>secEnterprise</param-value>
</context-param>

```

- 4 Change the parameter value to **secWinAD**. The result should look like this:

```

<context-param>
    <param-name>biAuthType</param-name>
    <param-value>secWinAD</param-value>
</context-param>

```

- 5 Save and close the file.

## Step 4: Modify the applicationContext.xml File

- 1 Open this file with a text editor:

```

C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF
\applicationContext.xml

```

- 2 Locate the **loginContextName** property in the **jaasAuthenticationProvider** section.
- 3 Change the parameter value to **QAAD**. The result should look like this:

```

<bean id="jaasAuthenticationProvider"
class="org.acegisecurity.providers.jaas.JaasAuthenticationProvider">
    <property name="loginConfig" value="/WEB-INF/jaas.config"/>
    <property name="loginContextName" value="QAAD"/>
    ...
</bean>

```

- 4 Save and close the file.

## Step 5: Modify the jaas.config File

- 1 Open this file with a text editor:

```

C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\jaas.config

```

- 2 Locate the **QAAD** section.
- 3 Change the parameter values to your local values. Verify whether the specified parameter values have case sensitivity restrictions.



The result should look like this:

```
QAAD {
  com.hp.ov.cwc.security.jaas.JndiLoginModule required
  ldap.server.url="ldap://server.name:port"
  manager.dn="CN=admin,OU=Users,DC=your,DC=server,DC=com"
  manager.password="password_value"
  user.search.base="DC=labs,DC=peregrine,DC=com"
  user.search.filter="( &(sAMAccountName=<0>)(objectClass=user) )"
  group.search.base="group"
  group.search.filter="( &(member=<0>)(objectClass=group) ) ";
};
```

where any value shown in *italics* is replaceable with a valid local value. For more information about the settings, see the sample `jaas.config` file on the installation media.

- 4 Save and close the file.

## Step 6: Test the Active Directory Connection

You can verify that your connection is valid by running a command line utility. Follow these steps:

- 1 Open a Windows command line window.
- 2 Change directories to:

```
<bo_install_dir>\javasdk\bin
```

- 3 Run this command:

```
kinit.exe username@domain <mailto:username@domain> password
```

The user name should identify the administrator that you created in Step 2: Configure Administration Credentials on the BOE Central Management Console on page 85. For example:

```
ita_administrator@DNS_domain.com password
```

## Task 4: Configure Tomcat for Active Directory

Tomcat loads Java at startup. Java needs to know the location of the `krb5.ini` and `bscLogin.conf` files.

### Step 1: Specify the `krb5.ini` and `bscLogin.conf` File Locations

- 1 Stop Tomcat.
- 2 Click **Start > Programs > Tomcat > Tomcat Configuration**.
- 3 Click the **Java** tab.
- 4 At the bottom of the list of options in the **Java Options** text box, type these values:

```
-Djava.security.auth.login.config=C:\winnt\bscLogin.conf
-Djava.security.krb5.conf=C:\winnt\Krb5.ini
```

- 5 Click **OK**.

## Step 2: Edit Authentication Parameters

- 1 Open this file with a text editor:

C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\web.xml

- 2 Change this parameter:

```
<context-param>
  <param-name>biAuthType</param-name>
  <param-value>secLDAP</param-value>
</init-param>
```

To

```
<context-param>
  <param-name>biAuthType</param-name>
  <param-value>secWinAD</param-value>
</context-param>
```

- 3 Save and close the file.

- 4 Open this file with a text editor:

C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\applicationContext.xml

- 5 Locate this section:

```
<bean id="jaasAuthenticationProvider" class="...">
```

- 6 Change the value in this section:

```
<property name="loginContextName">
  <value>dpJndi</value>
</property>
```

To

```
<property name="loginContextName">
  <value>QAAD</value>
</property>
```

- 7 Save and close the file.

- 8 Delete this directory:

...\Tomcat\work\Catalina\localhost\FPA

- 9 Restart the Tomcat service.

## Step 3: Test InfoView Access

- 1 Click **Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise JavalInfoView**.

- 2 To log in:

- a Type the user name and password that you used in Step 6: Test the Active Directory Connection on page 89.
- b From the Authentication drop-down menu, select **Windows AD**.

- 3 If the login fails, repeat Step 1 through Step 3 in Task 2b on [page 84](#).



At this time, you can assign appropriate access rights for users to enable them to refresh reports.

## Task 5: Configure BOE Access Rights

You must enable FPA users or groups to view or edit the contents of a BOE folder and disable the access to any folder that a user or group should not view or edit.

### Step 1: Enable Access to the FPA Analytics and FPA Dashboard Folders

Follow these steps to grant access to the FPA analytics and FPA dashboard folders.

- 1 From the Windows **Start** menu, click **Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**.
- 2 Login with the appropriate credentials. (The default value is Administrator with no password.)
- 3 Select **Folders** from the drop-down list in the upper left corner.
- 4 Right-click the **FPA EN FPA Analytics** folder and select **User Security** from the context menu. The Central Management Console displays the **User Security: FPA EN FPA Analytics** window.
- 5 Select **Add Principals**. The Add Principals window appears.
- 6 Add full access rights to the FPA\_ANALYTIC group.
  - a Choose **FPA\_ANALYTIC** from the list of **Available users/groups**.
  - b Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
  - c Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
  - d Choose **Full Control** from the list of **Available Access Levels**.
  - e Click the single right arrow (>) to move this selection to the **Assigned Access Levels** list.
  - f Click **OK**.
- 7 Add view access rights to the DW\_ADMIN group.
  - a Select **Add Principals**.
  - a Choose **DW\_ADMIN** from the list of **Available users/groups**.
  - b Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
  - c Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
  - d Choose **View** from the list of **Available Access Levels**.
  - e Click the single right arrow (>) to move this selection to the **Assigned Access Levels** list.
  - f Click **OK**.
- 8 Click **Close**.

- 9 Repeat [step 4](#) through [step 8](#) on page 91, replacing **FPA EN FPA ANALYTICS** with **FPA EN FPA Dashboard**.

## Step 2: Enable Access to the DW Administration and DW Operations Folders


Follow these steps to grant access to the data warehouse administration and operations folders.

- 1 If necessary, select **Folders** from the drop-down list in the upper left corner of the Central Management Console.
- 2 Right-click the **DW EN Administration** folder and select **User Security** from the context menu. The Central Management Console displays the **User Security: DW EN Administration** window.
- 3 Select **Add Principals**. The Add Principals window appears.
- 4 Choose **DW\_ADMIN** from the list of **Available users/groups**.
- 5 Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
- 6 Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
- 7 Choose **Full Control** from the list of **Available Access Levels**.
- 8 Click the single right arrow (>) to move this selection to the Assigned Access Levels list.
- 9 Click **OK**.
- 10 Click **Close**.
- 11 Repeat [step 2](#) through [step 10](#), replacing **DW EN Administration** with **DW EN Operations**.

## Step 3: Enable Access to the Root Folder


Follow these steps to grant the users and groups access to the root folder.

- 1 If necessary, select **Folders** from the drop-down list in the upper left corner of the Central Management Console.
- 2 Right-click **All Folders** and select **Properties** from the context menu.
- 3 Select **User Security**. The Central Management Console displays the **User Security: Root Folder** window.
- 4 Select **Add Principals**. The Add Principals window appears.
- 5 Add full access rights to the FPA groups.
  - a Choose **FPA\_ANALYTIC**, **FPA\_ADMIN**, and **FPA\_CE\_CONFIG** from the list of **Available users/groups**.
  - b Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
  - c Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
  - d Choose **Full Control** from the list of **Available Access Levels**.
  - e Click the single right arrow (>) to move the selection.

- f On the **Advanced** tab, click **Add/Remove Rights**.
-  You can ignore the highlighted yellow message at the top of the window.
- g In the right pane, scroll to select **View Objects** in the list. and do the following:
  - Select the green check icon to grant access.
  - Clear the **Apply to SubObject** check box.
- h Click **OK** to return to the Add Principals window.
- i Click **OK** to return to the User Security: Root Folder window.
- 6 Add view access rights to the DW\_ADMIN group.
  - a Select **Add Principals**. The Add Principals window appears.
  - a Choose **DW\_ADMIN** from the list of **Available users/groups**.
  - b Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
  - c Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
  - d Choose **View** from the list of **Available Access Levels**.
  - e Click the single right arrow (>) to move the selection.
  - f Click **OK** to return to the Add Principals window.
  - g Click **OK** to return to the User Security: Root Folder window.
- 7 Click **Close**.

## Step 4: Enable Users to Refresh Reports

You must assign access rights to the Universe Designer to refresh WebI reports.

- 1 Select **Users and Groups** from the drop-down list in the upper left corner of the Central Management Console.
  - 2 In the right pane, right-click **FPA\_ANALYTIC** and select **Member Of** from the context menu.
  - 3 Select **Join Group**. The Central Management Console displays the Join Group: FPA\_Analytic window.
  - 4 Select **Group Hierarchy**.
  - 5 Select **Universe Designer Users**.
  - 6 Click the right arrow (>) to move it into the **Destination Group(s)** list.
  - 7 Click **OK**.
  - 8 Repeat [step 2](#) through [step 7](#) for **FPA\_ADMIN**, **FPA\_CE\_CONFIG**, and **DW\_ADMIN**.
  - 9 Close the Central Management Console.
-  Click **File > Exit** to ensure that the session closes correctly.

For more information, see the *SAP BusinessObjects Enterprise XI 3.1 Administration Guide*.

## Task 6: Test Authentication

- 1 From a browser, type the Financial Planning & Analysis URL. For example:  
`http://server_name:8080/FPA`
- 2 Type the user login and password for one of the user profiles that you created.
- 3 If the login fails, repeat the configuration tasks in the LDAP or Active Directory sections.
- 4 If the login succeeds, test the other user login and password combinations that you created.

## Troubleshooting

When authentication fails, do the following:

- Review modified files for spelling errors and case sensitivity.
- Verify user and group settings in the BOE Central Management Console.
- Start the debugging feature in log4j.xml files to trace the authentication process.
- If an error message appears indicating that the system could not locate the navigation menu, verify that the user belongs to a valid FPA group.

## LDAP Authentication

### Modified Files

If LDAP authentication fails, review this information from these files located in the C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF directory:

- The biAuthType is set to secLDAP in web.xml.
- The loginContextName is set to dpJndi in applicationContext.xml.
- The dpJndi section is configured properly in jaas.config.

### BOE Central Management Console

Verify this information from the CMC:

- The user names are spelled correctly with the correct case.
- The group names are spelled correctly with the correct case and match the groups that are in web.xml.
- The user has been added to the group.

## InfoView Authentication

When accessing the InfoView login page from Financial Planning & Analysis, the option to choose the authentication type might not be available. Updating the InfoView web.xml file enables users to select LDAP authentication.

- 1 Open this file with a text editor:

```
<bo_install_dir>\boe\Tomcat55\webapps\InfoViewApp\WEB-INF\web.xml
```

- 2 Locate the **authentication.visible** parameter name.
- 3 Change the parameter value to **true**. The result should look like this:

```
<context-param>  
  <param-name>authentication.visible</param-name>  
  <param-value>>true</param-value>  
</context-param>
```

- 4 Save and close the file.

If a user cannot access InfoView, review the user and group settings. If a user can access infoView but not Financial Planning & Analysis, check the group settings:

- If needed, delete the group from the BOE CMC and re-add it.
- Verify that the user is in a regular group, not an organization unit or security group.

## Active Directory Authentication

When Active Directory authentication fails, review the spelling and case of these files located in the C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF directory:

- web.xml
- applicationContext.xml
- jaas.config

Check the spelling and case of the following files. They are in the location you specified when you configured Tomcat for Active Directory:

- krb5.ini
- bscLogin.conf

## Authentication Log Files

By setting the log files to trace the authentication process, you can identify possible security or configuration issues.

### Creating Business Objects Logs

- 1 From the Windows **Start** menu, click **All Programs > Tomcat > Tomcat Configuration**.
- 2 Click the Java tab.
- 3 In Java Options, add this statement:  

```
-Dcrystal.enterprise.trace.configuration=verbose
```
- 4 Click **OK**.

- 5 View this file:  
`<bo_install_dir>\boe\Tomcat55\logs\stdout.log`

You can also view this file:

`C:\documents and settings\<username>\.businessobjects\jce_verbose.log`

## Creating Financial Planning & Analysis Logs

To begin logging files, change the level value in `log4j.xml` for Common Web Client (CWC).

- 1 Open this file with a text editor:

`C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\classes\log4j.xml`

- 2 Locate **logger name="com.hp.ov.cwc"**.
- 3 Change the level value to **debug**. The result should look like this:

```
<logger name="com.hp.ov.cwc" additivity="false">
  <level value="debug" />
  <appender-ref ref="cwc">
</logger>
```

- 4 Verify that the log path for the `cwc` appender section is a valid server location. If not, log files will be located in `C:\Windows\system32`. For example:

```
<!-- cwc file appender -->
<appender name="cwc" class="org.apache.log4j.RollingFileAppender">
  <param name="File" value="C:\cwc.log"/>
  <param name="MaxFileSize" value="1000KB"/>
  <param name="MaxBackupIndex" value="3"/>
  <layout class="org.apache.log4j.PatternLayout">
    <param name="ConversionPattern" value="%d [%-5p] %t %c - %m%n"/>
  </layout>
</appender>
```



# 10 Next Steps

After you install the required components of the Financial Planning & Analysis application and data warehouse, and configure security roles, you should be able to start the application user interface. You must complete these post-installation tasks.

- [Task 1: Change Connection Properties in the BOE Central Management Console.](#)
- [Task 2: Schedule Reports to Refresh](#) on page 98.
- [Task 3: Install Financial Planning & Analysis 9.11](#) on page 99.

## Task 1: Change Connection Properties in the BOE Central Management Console

Because each Financial Planning & Analysis component uses a connection to BusinessObjects Enterprise (BOE), you must increase the default settings for the connections in the BOE Central Management Console.


- 1 From the Windows **Start** menu, click **Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**.
- 2 Log on the BOE Central Management Console as an administrator.
- 3 Click **Servers**.
- 4 Expand **Service Categories** in the left pane.
- 5 Click **Web Intelligence**.
- 6 Double-click **ITAnalytics.WebIntelligenceProcessingServer** in the right pane.
- 7 In the Properties window, change the values for the following settings:
  - **Maximum Documents per User:** HP recommends that you increase this setting to **20**. However, this value should be set according to the needs of your company. This setting specifies the maximum number of active sessions or Web Intelligence reports that can be associated with a user at any time. The valid range is 1 – 20.
  - **Maximum Connections:** HP recommends that you increase this setting to **700**. However, this value should be set according to the needs of your company. This setting specifies the approximate maximum number of simultaneous sessions that can be opened at one time. The valid range is 5 – 65,535.
  - **Idle Connection Timeout (minutes):** HP recommends that you increase this setting to **40**. However, this value should be set according to the needs of your company. This setting specifies the number of minutes that the server waits for a request from an idle connection. If you set this value too low, the request may close prematurely. If you set this value too high, requests will be queued while the server waits for idle requests to close.
- 8 Click **Save & Close**.
- 9 Log off the BOE Central Management Console and close the application.
- 10 Stop the BOE service:

- a From the Windows **Start** menu, click **Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > Central Configuration Manager**.
  - b Right-click the **Server Intelligence Agent (IT Analytics)** service and select **Stop**.
- 11 Stop the Tomcat service:
    - In the Central Configuration Manager, right-click the **Apache Tomcat 5.5.20** service and select **Stop**.
  - 12 Restart the BOE service:
    - In the Central Configuration Manager, right-click the **Server Intelligence Agent (IT Analytics)** service and select **Start**.
  - 13 Delete all of the contents in the Tomcat work folder:
 

```
<bo_install_dir>\Tomcat55\work\
```
  - 14 Restart the Tomcat service:
    - In the Central Configuration Manager, right-click the **Apache Tomcat 5.5.20** service and select **Start**.

## Task 2: Schedule Reports to Refresh

You must schedule the Web Intelligence (WebI) reports to refresh automatically to get the most current data from your sources. The XcelSius components require that you use the schedule feature to properly retrieve data. Do not refresh reports manually or run them interactively to refresh them.

- 1 From the Windows **Start** menu, click **Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Java InfoView**.
- 2 Log on to InfoView.
- 3 Click **Document List**.
- 4 Expand **Public Folders**.
- 5 Find the report folders for analytics and dashboards:
  - **FPA EN FPA Analytics**: Contains the WebI reports for Financial Planning & Analysis.
  - **Xcelsius FPA Dashboard Data Provider**: Contains the WebI reports for the Financial Planning & Analysis dashboards.
-  If the default or published allocation scenario is modified, dashboards will not be current until the WebI is refreshed.
- 6 Click the **FPA EN FPA Analytics** folder.
- 7 Schedule a report to refresh.
  - a Right-click a report in the right pane and select **Schedule**.
  - b Click **Recurrence** in the left pane.
  - c From the **Run object** drop-down list, select a recurrence value according to how often your business needs to refresh data.

- d Depending on the recurrence value that you choose, InfoView displays additional fields where you can enter specifics about when to refresh the report. Provide the information for these fields, then click **Schedule**.
  - ▶ HP recommends that you refresh nightly, depending on the amount of data and the size of your server.
- 8 Repeat [step 7](#) for each report in the folder.
- 9 Click the **Xcelsius FPA Dashboard Data Provider** folder.
- 10 To schedule a report to refresh, repeat [step 7](#) for each report in the folder.

### Task 3: Install Financial Planning & Analysis 9.11

Financial Planning & Analysis (FPA) 9.11 is an optional patch that provides support for loading data from a non-HP data source into the FPA data warehouse. If you want to install FPA 9.11, you must install it on top of FPA 9.10 before you complete the initialization or run the extract, transform, and load (ETL) process. Do not complete the tasks described in the *HP FPA 9.10 Data Warehouse Administration Guide*. Go to the HP Software Patches web site to download the FPA 9.11 patch .zip file. Then follow the instructions in the *HP FPA 9.11 Installation and Configuration Guide* to install and configure FPA 9.11, initialize the FPA 9.11 data warehouse, and run the initial ETL process.

HP Software Patches web site: [https://ovrd.external.hp.com/rd/sign-in?TYPE=33554433&REALMOID=06-000dbac2-dc02-1680-9aa0-a14d91440000&GUID=&SMAUTHREASON=0&METHOD=GET&SMAGENTNAME=\\$SM\\$i%2bVqGd4Zrg0nzFPTAbCG%2fQrn0f2UZowYft2RitHvQEb1t1q1Fq3Rt65IHxgfcRnD&TARGET=\\$SM\\$http%3a%2f%2fsupport%2eopenview%2ehp%2ecom%2fselfsolve%2fpatches](https://ovrd.external.hp.com/rd/sign-in?TYPE=33554433&REALMOID=06-000dbac2-dc02-1680-9aa0-a14d91440000&GUID=&SMAUTHREASON=0&METHOD=GET&SMAGENTNAME=$SM$i%2bVqGd4Zrg0nzFPTAbCG%2fQrn0f2UZowYft2RitHvQEb1t1q1Fq3Rt65IHxgfcRnD&TARGET=$SM$http%3a%2f%2fsupport%2eopenview%2ehp%2ecom%2fselfsolve%2fpatches)

This site requires that you register for an HP Passport and sign-in. To register for an HP Passport ID, go to:

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

Or click the **New users - please register** link on the HP Passport login page.

- ▶ If you do not want to install FPA 9.11, view the *HP FPA 9.10 Data Warehouse Administration Guide* for the next steps to create a successful initial ETL process. You can download the current version of the guide from the HP Support manuals web site. For more information, see [Support](#) on page 4.



# A Installing SAP BusinessObjects Xcelsius and the Xcelsius XWIS Add-On

The SAP BusinessObjects Xcelsius 2008 SP3 product is a visual tool that you can use to create and edit analytics and dashboards. DVD 2, labeled *Dashboard Development Kit*, contains the files for the installation of Xcelsius.

Although Xcelsius is optional, you must install it and the Antivia Xcelsius™ Web Intelligence Integration Suite (XWIS) add-on to enable Financial Planning & Analysis to retrieve data from the BOE server and to create customized dashboards.

## Install Xcelsius

If you install Xcelsius, you can take advantage of its ability to integrate with the Microsoft Office suite of tools. For example, if you have an SAP BusinessObjects Xcelsius installation, you can e-mail reports or embed analytics in Microsoft PowerPoint presentations. It also integrates with the Financial Planning & Analysis installation of BOE to create new analytics or dashboards.

You must install Xcelsius at the command line. Do not use the Windows installer. Enterprise licensing for Xcelsius is not managed through the Windows interface and the command line installation also installs the required Xcelsius fixpacks.

## Requirements

Xcelsius requires installation of Microsoft Excel 2003 or 2007 and Adobe Flash Player 10.0.45.2 or higher. For a complete list of Xcelsius 2008 SP3 supported platforms, see the *Xcelsius 2008 Service Pack 3 – Supported Platforms* documentation at this web site:

<http://www.sdn.sap.com/irj/scn/go/portal/prtroot/docs/library/uuid/50fdb3d2-50cc-2c10-e392-a2e481f71694?QuickLink=index&overridelayout=true>

Table 8 describes the minimum hardware requirements for the server that hosts SAP BusinessObjects Xcelsius 2008 SP3.

**Table 8 Xcelsius 2008 SP3 Hardware Requirements**

Item	Minimum Requirement
Disk Space	1.25 GB
RAM	1 GB
Processor	1 GHz

## Command Line Syntax

You can install Xcelsius 2008 SP3 at the command line.

### Syntax

```
install-xcelsiusSP3 [-installdir <directory>]
                    [-help]
```

**Table 9 Syntax Options**

Option	Required?	Description
<b>-installdir</b> <i>path_and_directory</i>	N	Installation path and directory. If none is specified, the default is: C:\Program Files\HP\BO\xcelsius. <b>Note:</b> If other BOE applications exist on the host server, Xcelsius 2008 SP3 installs in the same directory, regardless of the -installdir specification.
<b>-help</b>	N	Display command syntax.

### Return codes

- 0 – Success
- 1 – Success with warnings
- >1 – Errors

### Examples

```
install-xcelsiusSP3 -installdir "C:\Program Files\xcelsius\  
install-xcelsiusSP3 -help
```

## Installation Steps

- 1 Copy the DVD-2 contents from the installation media to your local file system.
  - 2 If you are copying files to a remote machine where Xcelsius will be installed, you must make the files writeable before installing:
    - Right-click the root directory where the contents of DVD2 were copied, clear the Read-only check box, and select to apply this change to all its sub-folders and files.
  - 3 Open a Windows command line window.
  - 4 Change to the location where you copied the DVD-2 contents.
  - 5 Type this command:

```
install-xcelsiusSP3
```
  - 6 Press **Enter**. After the Xcelsius installation completes, your system may restart.
- To specify a different installation directory, see [Command Line Syntax](#) on this page.

## Install the Xcelsius XWIS Add-On

Install the Antivia Xcelsius Web Intelligence Integration Suite for HP OEM add-on to enable Financial Planning & Analysis to retrieve data from the BOE server. For more information about XWIS Components and Content Panel used with Financial Planning & Analysis, see the *Antivia Xcelsius Web Intelligence Integration Suite (XWIS) User Guide HP OEM Version* available on the FPA installation media.

- 1 Download the add-on from the XWIS web application. From Windows Internet Explorer type the address of the XWIS application that you configured in [Part 3b: Configure XWIS](#) on page 74.  
For example, <http://fpa.americas.hpqcorp.net:8080/xwis-webapp>
- 2 From the Components list on the web application getting started window, click **Download antivia-xwis XLX**.
- 3 Navigate to the location on your computer where you want to save the file and click **Save**. Antivia saves the file to your computer as a .zip file.
- 4 Change the extension from .zip to **.xlsx**.
- 5 Open Xcelsius. From the File menu, select **Manage Add-Ons** to open the Xcelsius Add-On Manager.
- 6 Click **Install Add-On**, navigate to the location of the antivia-xwis.xlsx file you saved in [step 4](#), and double-click it.  
  
Xcelsius installs the add-on. When the add-on is successfully installed, **Xcelsius Web Intelligence Integration Suite for HP OEM** appears in the Xcelsius Add-On Manager window.
- 7 Click **Close** to close Add-On Manager.
- 8 Click **Exit**.
- 9 Close the XWIS application window.





# B Setting Up File Based Authentication

File based authentication is a quick way to set up temporary authentication for a test environment or prototype. It is not recommended for a production environment.



You must use BusinessObjects to create a user and group prior to configuring file based authentication and accessing the web application.

## File Based Authentication Checklist

Print this checklist to use during the installation process. As you complete each task, mark it finished. Complete these tasks to configure authentication specified by a file.

- [Task 1: Create a User](#) on this page.
- [Task 2: Create a Group](#) on page 106.
- [Task 3: Configure File Based Authentication](#) on page 106.
- [Task 4: Configure Financial Planning & Analysis Access Rights](#) on page 107.
- [Task 5: Configure BOE Access Rights](#) on page 107.
  - Step 1: Enable Access to the FPA Analytics and FPA Dashboard Folders on page 107.
  - Step 2: Enable Access to the DW Administration and DW Operations Folders on page 108.
  - Step 3: Enable Access to the Root Folder on page 109.
  - Step 4: Enable Users to Refresh Reports on page 110.
- [Task 6: Test Authentication](#) on page 110.

### Task 1: Create a User

- 1 From the Windows **Start** menu, click **All Programs > BusinessObjects XI 3.1 > BusinessObjectsEnterprise > Business Objects Central Management Console**.
- 2 Click **Users and Groups**.
- 3 Right-click **User List** and select **New User**.
- 4 Type an **Account Name**, such as demo.
- 5 Type a **Password** value.
- 6 Re-type the password to **Confirm**.
- 7 Accept (or change) the default **Authentication Type** (Enterprise) and the **Connection Type** (Concurrent User).
- 8 Click **Create & Close**.

## Task 2: Create a Group

- 1 If necessary, log in to the BusinessObjects Central Management Console: From the Windows **Start** menu, click **All Programs > BusinessObjects XI 3.1 > BusinessObjectsEnterprise > Business Objects Central Management Console**.
- 2 Log in with the appropriate credentials.
- 3 From the upper left drop-down list, select **Users and Groups**.
- 4 In the left navigation pane, right-click **Group List** and select **New Group**.
- 5 Type a new **Group Name**. For example, type FPA\_ADMIN.
- 6 Click **OK**. The new group appears in the right pane.
- 7 In Tasks 4 and 5 below, you will need groups for FPA\_ANALYTIC, FPA\_CE\_CONFIG, and DW\_ADMIN. Repeat 4 to 6 above to create the FPA\_ANALYTIC, FPA\_CE\_CONFIG, and DW\_ADMIN groups.
- 8 To populate your groups with users, right-click the new group and select **Add Members to Group**.
- 9 Add one or more users to the group by selecting a user role and clicking the right arrow (>) to move that user role into the group. For example, you can select **Everyone**, or select **Administrators** to limit the access to Administrators.
- 10 Click **OK** and close the Central Management Console.

## Task 3: Configure File Based Authentication

- 1 Open this file with a text editor:  
C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\web.xml

- 2 Change this parameter:

```
<init-param>  
  <param-name>biAuthType</param-name>  
  <param-value>secLDAP</param-value>  
</init-param>
```

To

```
<init-param>  
  <param-name>biAuthType</param-name>  
  <param-value>secEnterprise</param-value>  
</init-param>
```

- 3 Save and close the file.
- 4 Open this file with a text editor:  
C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF\applicationContext.xml

- 5 Locate this section:

```
<bean id="jaasAuthenticationProvider" class="...">
```

- 6 Change the value in this section:

```
<property name="loginContextName">  
  <value>dpJndi</value>
```

```
</property>
To
<property name="loginContextName">
  <value>BILoginModule</value>
</property>
```

- 7 Save and close the file.

## Task 4: Configure Financial Planning & Analysis Access Rights

- 1 Stop the Tomcat service.
- 2 Delete this directory:  
...\\Tomcat\\work\\Catalina\\localhost\\FPA
- 3 Under the C:\\Program Files\\HP\\FPA 9.10\\Web Application\\WEB-INF\\lib directory, rename file ita-application-main.jar to ita-application-main.zip.
- 4 Open the renamed ita-application-main.zip file with WinZip.
- 5 Extract the biusers.properties file to this location:  
C:\\Program Files\\HP\\FPA 9.10\\Web Application\\WEB-INF\\classes  
\\biusers.properties
- 6 Open it with a text editor.
- 7 Locate the last line and replace demo=demo with the login=password value that you specified when you defined the generic user in [Task 1: Create a User](#), [step 4](#) and [step 5](#) on page 105. The groups that the user is part of follow the password value. The line will look like this:  
demo=demo,FPA\_ADMIN,FPA\_ANALYTIC, FPA\_CE\_CONFIG, DW\_ADMIN
- 8 Save and close the file.
- 9 Add the biusers.properties file back into ita-application-main.zip using Winzip.
- 10 Rename the ita-application-main.zip file to ita-application-main.jar.
- 11 Restart the Tomcat service.

## Task 5: Configure BOE Access Rights

You must enable FPA users or groups to view or edit the contents of a BOE folder and disable the access to any folder that a user or group should not view or edit.

### Step 1: Enable Access to the FPA Analytics and FPA Dashboard Folders

Follow these steps to grant access to the FPA analytics and FPA dashboard folders.

- 1 From the Windows **Start** menu, click **Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**.
- 2 Login with the appropriate credentials. (The default value is Administrator with no password.)
- 3 Select **Folders** from the drop-down list in the upper left corner.

- 4 Right-click the **FPA EN FPA Analytics** folder and select **User Security** from the context menu. The Central Management Console displays the **User Security: FPA EN FPA Analytics** window.
- 5 Select **Add Principals**. The Add Principals window appears.
- 6 Add full access rights to the FPA\_ANALYTIC group.
  - a Choose **FPA\_ANALYTIC** from the list of **Available users/groups**.
  - b Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
  - c Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
  - d Choose **Full Control** from the list of **Available Access Levels**.
  - e Click the single right arrow (>) to move this selection to the **Assigned Access Levels** list.
  - f Click **OK**.
- 7 Add view access rights to the DW\_ADMIN group.
  - a Select **Add Principals**.
  - a Choose **DW\_ADMIN** from the list of **Available users/groups**.
  - b Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
  - c Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
  - d Choose **View** from the list of **Available Access Levels**.
  - e Click the single right arrow (>) to move this selection to the **Assigned Access Levels** list.
  - f Click **OK**.
- 8 Click **Close**.
- 9 Repeat [step 4](#) on page 108 through [step 8](#), replacing **FPA EN FPA ANALYTICS** with **FPA EN FPA Dashboard**.

## Step 2: Enable Access to the DW Administration and DW Operations Folders


Follow these steps to grant access to the data warehouse administration and operations folders.

- 1 If necessary, select **Folders** from the drop-down list in the upper left corner of the Central Management Console.
- 2 Right-click the **DW EN Administration** folder and select **User Security** from the context menu. The Central Management Console displays the **User Security: DW EN Administration** window.
- 3 Select **Add Principals**. The Add Principals window appears.
- 4 Choose **DW\_ADMIN** from the list of **Available users/groups**.
- 5 Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
- 6 Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
- 7 Choose **Full Control** from the list of **Available Access Levels**.

- 8 Click the single right arrow (>) to move this selection to the Assigned Access Levels list.
- 9 Click **OK**.
- 10 Click **Close**.
- 11 Repeat [step 2](#) through [step 10](#), replacing **DW EN Administration** with **DW EN Operations**.

### Step 3: Enable Access to the Root Folder

Follow these steps to grant the users and groups access to the root folder.


- 1 If necessary, select **Folders** from the drop-down list in the upper left corner of the Central Management Console.
- 2 Right-click **All Folders** and select **Properties** from the context menu.
- 3 Select **User Security**. The Central Management Console displays the **User Security: Root Folder** window.
- 4 Select **Add Principals**. The Add Principals window appears.
- 5 Add full access rights to the FPA groups.
  - a Choose **FPA\_ANALYTIC**, **FPA\_ADMIN**, and **FPA\_CE\_CONFIG** from the list of **Available users/groups**.
  - b Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
  - c Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
  - d Choose **Full Control** from the list of **Available Access Levels**.
  - e Click the single right arrow (>) to move the selection.
  - f On the **Advanced** tab, click **Add/Remove Rights**.  
 You can ignore the highlighted yellow message at the top of the window.
  - g In the right pane, scroll to select **View Objects** in the list. and do the following:
    - Select the green check icon to grant access.
    - Clear the **Apply to SubObject** check box.
  - h Click **OK** to return to the Add Principals window.
  - i Click **OK** to return to the User Security: Root Folder window.
- 6 Add view access rights to the DW\_ADMIN group.
  - a Select **Add Principals**. The Add Principals window appears.
  - a Choose **DW\_ADMIN** from the list of **Available users/groups**.
  - b Click the single right arrow (>) to move this selection to the **Selected users/groups** list.
  - c Click **Add and Assign Security**. The Central Management Console displays the Assign Security window.
  - d Choose **View** from the list of **Available Access Levels**.
  - e Click the single right arrow (>) to move the selection.
  - f Click **OK** to return to the Add Principals window.
  - g Click **OK** to return to the User Security: Root Folder window.

- 7 Click **Close**.

## Step 4: Enable Users to Refresh Reports

You must assign access rights to the Universe Designer to refresh WebI reports.

- 1 Select **Users and Groups** from the drop-down list in the upper left corner of the Central Management Console.
- 2 In the right pane, right-click **FPA\_ANALYTIC** and select **Member Of** from the context menu.
- 3 Select **Join Group**. The Central Management Console displays the Join Group: FPA\_Analytic window.
- 4 Select **Group Hierarchy**.
- 5 Select **Universe Designer Users**.
- 6 Click the right arrow (>) to move it into the **Destination Group(s)** list.
- 7 Click **OK**.
- 8 Repeat [step 2](#) through [step 7](#) for **FPA\_ADMIN**, **FPA\_CE\_CONFIG**, and **DW\_ADMIN**.
- 9 Close the Central Management Console.

 Click **File > Exit** to ensure that the session closes correctly.

For more information, see the *SAP BusinessObjects Enterprise XI 3.1 Administration Guide*.

## Task 6: Test Authentication

- 1 From a browser, type the Financial Planning & Analysis URL. For example:  
`http://server_name:8080/FPA/`
- 2 Type the user login and password for one of the user profiles that you created.
- 3 If the login fails, repeat [Task 3: Configure File Based Authentication](#) on page 106.
- 4 If the login succeeds, test the other user login and password combinations that you created.

## Troubleshooting

When file based authentication fails, review the spelling and case of these files located in the C:\Program Files\HP\FPA 9.10\Web Application\WEB-INF directory:

- web.xml
- applicationContext.xml
- \classes\biusers.properties
- If an error message appears indicating that the system could not locate the navigation menu, verify that the user belongs to a valid FPA group.

## BOE Central Management Console

Verify this information from the CMC:

- The user names are spelled correctly with the correct case.
- The group names are spelled correctly with the correct case and match the groups that are in web.xml.
- The user has been added to the group specified in the biusers.properties file.





# C Installation Checklist

The Financial Planning & Analysis complete installation requires many login names, passwords, and other connection information. If you gather this information before you begin, you can ensure that you apply consistent naming conventions across the server environment. Complete the following checklist before you begin the file installation. Use it as a reference as you install the application, data warehouse, and create data source connections among the different servers.



Before you start the application, make sure that BusinessObjects access rights are set up. For more information, see [Chapter 9, Configuring User Roles and Authentication](#).

## Naming Limitations

RDBMS applications, BOE, and BODS allow blank or empty database passwords. However, Financial Planning & Analysis does *not* support databases with blank or empty passwords. You can use the same password for each database if you want to simplify access control.

## Unsupported Password Characters

The ampersand special character (&), exclamation point (!), double quotation mark (“), single quotation mark (‘), pipe (|), and carat (^) are not supported within a password. Underscores are valid.

## Database Naming Conventions

HP recommends that you do not create database names with embedded spaces. Financial Planning & Analysis supports only alphanumeric characters and the underscore in database names. You can use underscores or camel case to create more descriptive names. For example, boecms can be boe\_cms or boeCms, but avoid “boe cms” with an embedded blank space. If database names have embedded blank spaces, dashes, or other special characters, results may be unpredictable.

## Target and Staging Database Naming

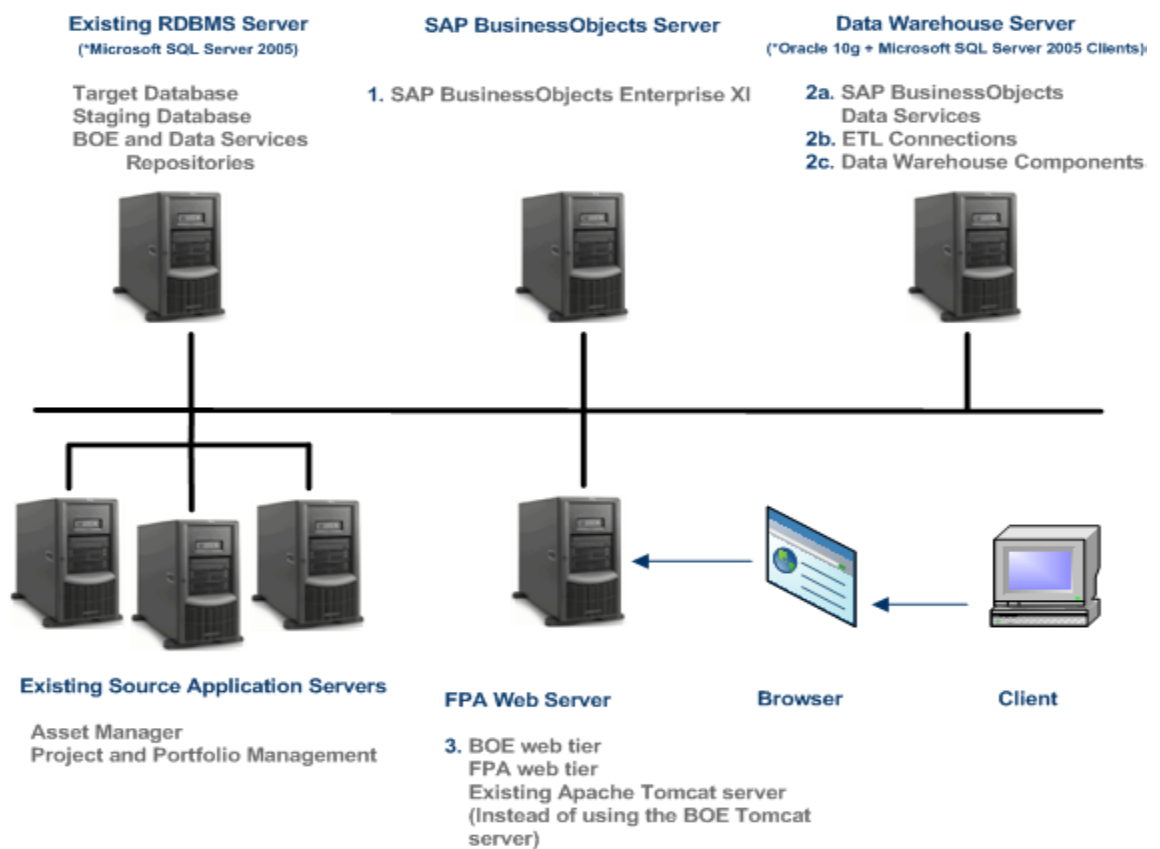
The first character of the Target database name and Staging database name must begin with an alpha character. The DBinit utility will fail if you use database names that begin with numbers.

# Using the Checklists




These checklists help you prepare for the steps that you complete to install a complete working environment for Financial Planning & Analysis and configure all the necessary connections shown in Figure 14. There are separate checklists to gather all of the configuration information that you need before you start each new step in the installation process:

- Part 1: SAP BusinessObjects Enterprise XI 3.1 Server Checklist on page 115.
- Part 2: Financial Planning & Analysis Data Warehouse Checklist on page 116.
- Part 3: Financial Planning & Analysis Web Application and Antivia XWIS Checklist on page 120.

**Figure 14 Financial Planning & Analysis Working Environment**









## Part 1: SAP BusinessObjects Enterprise XI 3.1 Server Checklist





	<b>Configurable Information</b>	<b>Your Value</b>
<b>License information</b>		
<input type="checkbox"/>	License text file location	
<b>BOE CMS Database Connections</b>		
	There are no requirements for naming; however, the recommendation is lower case with a suffix to distinguish the ODBC DSN from the database name and login.	
<input type="checkbox"/>	BOE CMS ODBC data source name	Example: boecms_dsn
<input type="checkbox"/>	BOE CMS database name (Do not create a BOE CMS database with embedded blanks or special characters in the database name)	Example: boecms Invalid: boe cms, boe-cms, boe@cms
<input type="checkbox"/>	BOE CMS database login name	Example: boecms
<input type="checkbox"/>	BOE CMS database password	Windows or Microsoft SQL Server password, depending on authentication method.
<b>BOE Audit Database Connections</b>		
	There are no requirements for naming; however, the recommendation is lower case with a suffix to distinguish the ODBC DSN from the database name and login. This database is optional. You can store audit information in the CMS database.	
<input type="checkbox"/>	BOE Audit database ODBC DSN	Example: boeaudit_dsn
<input type="checkbox"/>	BOE Audit database name (Do not create a BOE Audit database with embedded blanks or special characters in the database name)	Example: boeaudit Invalid: boe audit, boe-audit, boe@audit
<input type="checkbox"/>	BOE Audit database login name	Example: boeaudit
<input type="checkbox"/>	BOE Audit database password	Windows or Microsoft SQL Server password, depending on authentication method.


## Part 2: Financial Planning & Analysis Data Warehouse Checklist

This phase of the installation has three separate installation steps: SAP Business Objects Data Services XI 3.1 (BODS), the data sources for ETL, and the data warehouse.

	Configurable Information	Your Value
<b>License information</b>		
<input type="checkbox"/>	License text file location	
	<b>2a) BODS Configuration Information</b>	
	There are no requirements for naming; however, the recommendation is lower case. You cannot use a pre-existing instance of BODS.	
<input type="checkbox"/>	BODS database server name	
<input type="checkbox"/>	BODS database registration name (User-defined name to register the database on the BODS Management Console)	Example: bods_repository
<input type="checkbox"/>	BODS database name (Do not create a BODS database with embedded blanks or special characters in the database name)	(Cannot exceed 12 characters) Example: bods Invalid: bo ds, bo-ds, bo@ds
<input type="checkbox"/>	BODS login ( <b>admin</b> is the default login value. You can change it after the initial login)	Example: bods
<input type="checkbox"/>	BODS password	Windows or Microsoft SQL Server password, depending on authentication method.
<input type="checkbox"/>	BODS database TCP port number	Example: 1433
	<b>2b) ETL Data Source Configuration Information for Asset Manager</b>	
	You can configure a connection for a maximum of two data sources: one Asset Manager source and one Project and Portfolio Management data source.	
<input type="checkbox"/>	Database type	Microsoft SQL Server 2005 (MSSQL) or Oracle 10g
<input type="checkbox"/>	Server name (MSSQL only)	
<input type="checkbox"/>	Database name (MSSQL only)	
<input type="checkbox"/>	Schema name (MSSQL only)	
<input type="checkbox"/>	Oracle JDBC library location (Oracle only)	Example: C:\oracle\app\oracle\product \10.2.0\server\jdbc\lib\ojdbc14.jar

	<b>Configurable Information</b>	<b>Your Value</b>
<input type="checkbox"/>	Connection name (Oracle only)	
<input type="checkbox"/>	Login	
<input type="checkbox"/>	Password	
<input type="checkbox"/>	Time Zone† (If available, this information is obtained from Asset Manager. If not, you must provide the correct value.)	Example: America/Indiana/Indianapolis
	<b>2b) ETL Data Source Configuration Information for Project and Portfolio Management</b>	
	You can configure a connection for a maximum of two data sources: one Asset Manager source and one Project and Portfolio Management source.	
<input type="checkbox"/>	Oracle JDBC library location	Example for Oracle 10g: C:\oracle\app\oracle\product\10.2.0\server\jdbc\lib\ojdbc14.jar  Example for Oracle 11: C:\app\server\product\11.1.0\client_1\jdbc\lib\ojdbc.jar
<input type="checkbox"/>	Connection name	
<input type="checkbox"/>	Login	
<input type="checkbox"/>	Password	
	<b>2c) Data Warehouse Configuration Staging Database Information</b>	
	The ETL process uses the staging database to consolidate extracted data from external sources.	
<input type="checkbox"/>	Staging database server name	
<input type="checkbox"/>	Staging database name (Do not create a staging database with embedded blanks or special characters in the database name.)	Example: staging Invalid: boe staging, boe-staging, boe@staging
<input type="checkbox"/>	Staging server administrator login	Example: sa
<input type="checkbox"/>	Staging server administrator password	Windows or Microsoft SQL Server password, depending on authentication method.
<input type="checkbox"/>	Staging database owner password	Windows or Microsoft SQL Server password, depending on authentication method.
<input type="checkbox"/>	External Sources location	Example: D:\External
<input type="checkbox"/>	AM Extract files location	Example: D:\AM\extract

	<b>Configurable Information</b>	<b>Your Value</b>
<input type="checkbox"/>	PPM Extract files location	Example: D:\PPM\extract
	<b>2c) Data Warehouse Configuration Target Database Information</b>	
	The target database contains the final version of the extracted data.	
<input type="checkbox"/>	Target database server name	Example: target
<input type="checkbox"/>	Target database name (Do not create a target database with embedded blanks or special characters in the database name.)	Example: target Invalid: boe target, boe-target, boe@target
<input type="checkbox"/>	Target server administrator login	Example: sa
<input type="checkbox"/>	Target server administrator password	Windows or Microsoft SQL Server password, depending on authentication method.
<input type="checkbox"/>	Target database owner password	Windows or Microsoft SQL Server password, depending on authentication method.
	<b>2c) Time and Currency Information</b>	
	This information identifies the right data to populate analytics.	
<input type="checkbox"/>	Date dimension start year	
<input type="checkbox"/>	Date dimension end year †‡	Minimum: One year after start year
<input type="checkbox"/>	Time granularity	
<input type="checkbox"/>	Data presentation time zone †	Example: America/Indiana/Indianapolis
	<b>2c) Related Servers</b>	

	<b>Configurable Information</b>	<b>Your Value</b>
<input type="checkbox"/>	SAP BOE server name	
<input type="checkbox"/>	Web application server name	
<input type="checkbox"/>	Web application server port	





† Time zone assignment depends on whether the Financial Planning & Analysis Configuration Tool can auto-detect GMT offset information in the Asset Manager source data. If this is the case, Financial Planning & Analysis can provide the precision to capture time zone information that includes GMT +/- hh:mm:ss; however, there is no automatic adjustment for daylight savings time variations.

The most definitive reference for time zone specification is the public domain Time Zone and Daylight Saving Time (tz) database, which uses region/city/smallest\_region formatting. This is the default Configuration Tool time zone model.



For more information, see <http://www.twinsun.com/tz/tz-link.htm>.

‡ If the date range that you specify is shorter than the actual date range of the source data, your initial sync with the remote data source will fail. Make sure the date range that you specify is all-inclusive.

## Part 3: Financial Planning & Analysis Web Application and Antivia XWIS Checklist

	Configurable Information	Your Value
<b>License information</b>		
<input type="checkbox"/>	License text file location	
	<b>3a) Apache Tomcat</b>	
	The Tomcat tab appears if you use an existing instance of Apache Tomcat that is part of a pre-installed instance of BOE.	
<input type="checkbox"/>	Tomcat location	Example: C:\....\Tomcat
<input type="checkbox"/>	Service name From <b>Control Panel &gt; Administrative Tools &gt; Services</b> , right-click the Apache Tomcat service to find the Service name on the General tab.	Example: Tomcat5
	<b>3a) Pre-Existing BOE Server Configuration Information</b>	
	The SAP BOE tab appears if you use a pre-installed instance of BOE.	
<input type="checkbox"/>	BOE server name	Example: server.name.com
	<b>3a) Financial Planning and Analysis (FPA) Application Information</b>	
<input type="checkbox"/>	Database server	Example: \....\server.name
<input type="checkbox"/>	Database name (This is the <i>same</i> target database identified in 2c) <a href="#">Data Warehouse Configuration Target Database Information</a> on page 118.)	Example: target
<input type="checkbox"/>	Login	Required: itaapp
<input type="checkbox"/>	Password	
<input type="checkbox"/>	JDBC URI (optional)	



	<b>Configurable Information</b>	<b>Your Value</b>
	<b>3b) XWIS Configuration Information</b> There are no requirements for naming; however, the recommendation is lower case.	
<input type="checkbox"/>	Server name	Example: \...\server.name
<input type="checkbox"/>	Database name (Do not create an XWIS database with embedded blanks or special characters in the database name)	Example: xwis_fpa Invalid: xwis fpa, xwis-fpa, xwis@fpa
<input type="checkbox"/>	Login	Example: xwis_user
<input type="checkbox"/>	Password	Windows or Microsoft SQL Server password, depending on authentication method.

