

Peregrine

BI Portal 5.1 Release Notes

For Windows, AIX, and Solaris

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Peregrine Systems, Inc.
3611 Valley Centre Drive San Diego, CA 92130
Tel 800.638.5231 or 858.481.5000
Fax 858.481.1751
www.peregrine.com



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BI Portal Release Notes

PEREGRINE

The BI Portal 5.1 Release Notes provide important information about this BI Portal release. Release Notes contain the most current information for BI Portal and take precedence over all other documentation. Review these Release Notes thoroughly before installing or using this product.

Release Notes contain an overview of key features, describe known issues with this release, and provide instructions to access information from other sources, such as the Peregrine Customer Support Web site. To access the support site, ensure that you have a valid Customer Support login ID and password.

The media shipped with this release contains a complete installation of the product, documentation, and language packs when applicable. See the packing list included with your shipment for a complete description of the media provided.

BI Portal is a business intelligence tool for advanced analytical and data mining that transforms unrelated, detailed information from ServiceCenter into meaningful, business-focused intelligence. Built on the Peregrine Reporting Data Store (RDS), BI Portal provides a predefined set of metrics and metadata from ServiceCenter. This information provides customers with a consolidated list of their business variables and enables power users to analyze standardized business data from a number of perspectives.

BI Portal analysis is based on predefined metadata stored within the RDS. This data is based on pre-defined business terminology that all users can access when creating queries and reports, as well as offers business rules and calculations defined for the business. Some of the metadata enables access to physical data, such as incidents, change requests, and inventory data. By

providing a consistent definition of the business variables and how they are calculated, organizations are assured that all decisions are based on the same core fundamental data interpretations and produce parallel results based on the same set of criteria.

Getting started

To understand the BI Portal 5.1 release, review the following information:

- Key features of BI Portal on page 6
- What's new in this release on page 8
- Compatibility Matrix on page 9
- Software Change Requests (SCRs) on page 9
- Search the KnowledgeBase on page 10
- BI Portal known issues on page 12
- Installation known issues on page 15
- OAA-related known issues on page 18
- Language support on page 20

Updates to the BI Portal Release Notes occur on an as-needed basis.

Revision Date	Type of known issue	SCR
November 11, 2004	RDS Connect.It scenario	SCR 33876
November 4, 2004	Installation	SCR 33878
October 14, 2004	Installation	SCR 33233
	Installation	SCR 33417

Key features of BI Portal

BI Portal empowers IT and business users to look at a pool of common variables defined across ServiceCenter, including Service Management, Incident Management, Change Management, Inventory Management, Service Level Management, and Root Cause Analysis. Users can then readily generate drill-down reports and graphs to identify causal relationships or trends that are not revealed through static reporting. Additionally, BI Portal allows users to

define their own queries and metrics and then publish them for other users. By providing users with the ability to analyze the Service Desk in real-time using metrics tailored to their unique environments, BI Portal delivers real-time business intelligence. The result is an unprecedented level of understanding and intelligent decision making as to how IT can best serve the needs of the business.

Built on RDS

BI Portal extracts ServiceCenter data from the Reporting Data Store (RDS), a consolidated reporting database for Peregrine products. This ensures optimal performance because reporting and queries occur in a separate database rather than the service management database.

Intuitive and flexible report management

BI Portal enables non-technical users to produce powerful reports to help track trends, as well as identify potentially unexpected causal relationships.

Rapid dissemination of information

Through the use of BI Portal, reports are disseminated immediately to those that need them most. By providing real-time information across the organization, decisions are made proactively before problems have a chance to develop and compound.

Web-based access

BI Portal provides an intuitive Get-It portal Web interface with a familiar Peregrine look and feel. Users can access, define, and execute reports from a Web browser, making access and system maintenance convenient and simple.

What's new in this release

BI Portal 5.1 includes the following new features:

- A new set of nineteen (19) sample reports, including sample reports for the Service Level Management module.
- The ability to send documents to BO users and non-BO users.
- The ability to upload documents to BI Portal.
- The ability to toggle between Draft mode and Page mode.
- The ability to download a document to your computer in either PDF or Excel format.
- A Document Management function that allows users to assign their documents to different groups.
- A Manage Addresses function that allows user to retain a list of non-BO user email addresses that can be used when Sending documents.
- The ability to manually synchronize users between the RDS database and the BO Repository.
- The ability to manually publish sample documents using the BI Portal.
- The ability to schedule documents to run automatically and view the list of scheduled documents.
- A Back button to return to the previous screen.

The following changes and enhancements, while not always visible, are also included in this release:

- BI Portal 5.1 is compatible with ServiceCenter version 5.1.x and version 6.
- BI Portal uses Business Objects, version 6.1b.
- RDS Performance tuning is enhanced.
- RDS deletion synchronization performance is improved.
- A basic customization guide, the Reporting Data Store (RDS) Administration Guide, is now available for the RDS schema, CIT Scenario, universe, and reports.
- SQL Server case sensitivity is now supported.
- A separate installer for RDS and BI Portal components.

- Manual creation of the BO Repository structure in the Supervisor Tool allows flexibility in naming conventions.
- The ability to apply data-level security conditions in the Supervisor tool.
- You can now perform separate BI Portal installations and configuration through Portal BI Administration pages.

Enhancements in BI Portal 5.1 benefit application developers, administrators, and end users.

Compatibility Matrix

The Compatibility Matrix lists supported versions of operating systems, browsers, Peregrine products, and other compatibility and support information. Open a browser and navigate to the Peregrine Customer Support Web site at:

<http://support.peregrine.com>

From the left navigation pane, click **Product Information > Product Family > BI Portal > Compatibility matrices**.

Software Change Requests (SCRs)

BI Portal 5.1 includes fixes for many Software Change Requests (SCRs). Follow these steps to view the SCRs included in this release.

- 1 Open a browser and navigate to the Peregrine Customer Support Web site at <http://support.peregrine.com>
- 2 Log in with your Customer ID and password.
- 3 Expand the product information topic in the left frame by clicking **Product Information > Service Management > BI Portal > View SCRs**.

- 4 You can filter the query by selecting the version, category, or subcategory for SCRs as the search criteria.
- 5 The Web site then displays a report that matches your criteria. You can view the report or click **Create Excel Report** to download a spreadsheet with the contents matching your search criteria.

OAA issues fixed in this release

The following table describes OAA issues fixed in this release.

SCR	Description
SCR 29055	Added support for Service Center 6. All Service Center backed OAA applications may now use Service Center versions 4, 5 or 6. Note that SC6 requires the application of the cm3cancel.unl when used with Get-Service. Details on installing this unload are provided at the bottom of this file.
SCR 30228	Added support for WebLogic 8.1. Installation instructions are available as a Knowledge Article available from the Peregrine customer support Web site. The Document ID for this Knowledge article is SAG-C1H-X5J9.
SCR 31978	SCAdapter now restores correct credentials on the SC connection after recovering from a connection failure. This is essential for proper application of Mandanten security, by the German company, Orgasoft™.

Search the KnowledgeBase

The KnowledgeBase contains articles with related information, tips, and workarounds for this release.

- 1 Open a browser and navigate to the Peregrine Customer Support Web site at: <http://support.peregrine.com>
- 2 Log in with your Customer ID and password.
- 3 In the Search KnowledgeBase, select **BI Portal** from the pull-down menu.
- 4 Click **Advanced Search** to access the Advanced KnowledgeBase Search dialog.

- 5 Type **Known Issues** in the **Search Criteria** text box. There are four steps to supply information to filter your search.
 - Step 1. Select **BI Portal** from the pull-down menu in the **Select a Product** text box.
 - Step 2. Select **Search Both.....**
 - Step 3. Select a version number.
 - Step 4. Choose a manual.
- 6 Click **Search**. The KnowledgeBase returns a list of resource links that you can click to open.

BI Portal known issues

The following table describes BI Portal 5.1 known issues.

Document ID	Known issue	Workaround
S86-R17-KZW8	<p>This issue applies to all Connect-It! executable files and the version 3.2.0 Runtime Environment (RTE).</p> <p>The Connect-It! SAP connector is based on an SAP Java API named SAP Java Connector (SAP JCo). You will therefore need to download additional libraries from the SAP Web site.</p> <p>This issue is also posted on the Customer Support Web site as knowledge article S86-R17-KZW8, "<i>How to obtain SAP libraries needed by the Connect-It! SAP adapter</i>".</p>	<p>Use the following steps to download the API from the SAP Web site:</p> <ol style="list-style-type: none"> 1 Open a browser and navigate to the following URL: http://service.sap.com/connectors For access, you will need to your SAP support user ID and password. 2 Click the section named SAP Java Connector. 3 Click Tools & Services. 4 Click Download SAP JCo Release 2.0.6. <p>This download is a zip file that contains the following three (3) files needed by Connect-It:</p> <ul style="list-style-type: none"> ■ <code>librfc32.dll</code> Copy this file to the <code>\bin32</code> folder of your Connect-It installation folder ■ <code>sapjcorfc.dll</code> Copy this file to the <code>\bin32</code> folder of your Connect-It installation folder ■ <code>sapjco.jar</code> Copy this file to the <code>\lib</code> folder of your Connect-It installation folder
SCR 29787	<p>After a new Group has been created using the Group Management function in the portal, the new group cannot immediately be deleted. The following error message is displayed:</p> <p>An error has occurred during the operation (19002).</p>	<p>Wait several minutes and retry. You should now be able to successfully delete the new group.</p>
SCR 30291	<p>When saving a document using the Java Report panel, the list of groups and categories you can choose to save the document to do not match. The items will match if the same items are selected in the Categories list and in the Groups list.</p>	<p>Ensure that the same items are selected in both the Categories list and the Groups list.</p>

Document ID	Known issue	Workaround
SCR 30949	<p>If the prefix to the name of the BI Portal group name matches the prefix for the ServiceCenter application group name, the prefix is truncated.</p> <p>For example, if the BI Portal group name is <i>PRGN_BIP</i> and the ServiceCenter application group name is <i>PRGN_BIP_SC</i>, the name appears as <i>SC</i> in the portal where the system-defined groups are listed.</p>	Do not assign a prefix to the ServiceCenter application group in the Supervisor tool. The prefix is removed when using system-defined groups.
SCR 32190	ServiceCenter out-of-the-box data is incorrect and should not be used for testing purposes.	Do not use ServiceCenter out-of-the-box data for testing purposes. For testing purposes, use the procedures in the BI Portal Installation Guide to load default data that is shipped with the BI Portal 5.1 product.
SCR 32268	When you use the interactive menu to remove sections from reports that contain sections, the report table overlaps the title of the report.	To remove a section and not have the report table overlap the title of the report, click Edit to open the Web Intelligence report panel and then edit the report to remove the section.
SCR 32899	Updating or deleting the personal category fails if the BIPGroupName contains an underscore character (_). In addition, you cannot send the affected document to other users until this problem is corrected.	<p>Use the following steps to edit or delete BIPGroupName that contain an underscore character (_):</p> <ol style="list-style-type: none"> 1 From the Category Management dialog, remove the text that contains an underscore from the BIPGroupName displayed in the Category field. 2 Click Submit to submit an update to change it to an appropriate name or select the incorrect name and click Delete to remove it.
SCR 32988	Reports that contain many charts may not display all charts when viewing in HTML format.	<p>Use the following steps to ensure that all expected charts display on reports:</p> <ol style="list-style-type: none"> 1 Position the cursor on the empty chart frame. 2 Right-click and select Show Picture from the pop-up menu. <p>You can optionally avoid this issue by viewing your report in PDF format.</p>

Document ID	Known issue	Workaround
SCR 33000	<p>In the User management screen, the BI Portal users that correspond to ServiceCenter contacts in are not consistently sorted. This behavior is due to the MS SQL Server sorting method used when sorting columns with NULL values. All other values are returned first and the null values display at the end. On Oracle, the display order is reversed. Null values display first, followed by the others.</p> <p>This workaround is only required for BI Portal users running an MS SQL Server database with contact-based authentication. The BI Portal process sorts in descending order by populating 9999999 for all operator records. The data from the query then returns the expected results for the Java program and the User Management screen populates all users with contact-based authentication so that the Admin can more easily manage users.</p>	<p>Use the following steps to properly display the sort order when running an MS SQL Server database with contact-based authentication:</p> <ol style="list-style-type: none">1 Open the rds_user scenario named rds_user.scn.2 From the Scenario Diagram pane, click Mappings:RDSUSER to select.3 From the Details of the Connector pane, click the <i>Mappings</i> tab.4 Double-click operator-rds_user to display the Edit Mapping window.5 Drag and drop rolegroup_id from the Destination Pane on the right to the Mapping pane on the left.6 In the mapping script value box, type 999999 to assign a value. This will populate a value of 999999 for the <i>rolegroup_id</i> field.7 From the Scenario diagram pane, select the ServiceCenter connector and then produce now to reload the data into RDS.
SCR 33876	<p>RDS connector names were changed and errors occur when running the RDS connector scenario.</p>	<p>Do not change the connector names defined in RDS Connect-It scenarios. There is logic dependency on these names.</p>

Installation known issues

The following table describes Installation known issues related to BI Portal.

Document ID	Known issue	Workaround
None.	If you select to automatically run the initial data synchronization from the RDS Installer, some reports may not return the expected data.	<p>You must manually start the initial data synchronization after the RDS Installer has completed. Use the procedures in the troubleshooting chapter of the <i>BI Portal Installation Guide</i> in the section titled, "No valid synchronization records" to recreate the RDS tables and then start the initial synchronization again.</p> <p>Do not select the option to automatically run the initial data synchronization from the RDS Installer.</p>
SCR 33223	When using the Sprinta com.inet.tds.TdsDriver driver, the RDS database does not initialize.	<p>To initialize the RDS database:</p> <ol style="list-style-type: none"> Using a text editor, update all the RDS*.bat files in %RDS_HOME%\common\bin (the default path is: C:\Program Files\Peregrine\RDS\common\bin) and add the following: <pre>set RDBMSclasspath = ; %RDS_HOME%\lib\sql\sprinta2000.jar</pre> In the %RDS_HOME%\conf\rds.properties file, (the default path is: C:\Program Files\Peregrine\RDS\conf\rds.properties) remove the line ;SelectMethod=cursor Copy the sprinta2000.jar to the C:\Program Files\Peregrine\RDS\lib\sql directory. Run the rds_init.bat manually. Continue the installation; run the CIT scenarios manually.

Document ID	Known issue	Workaround
SCR 33417	When connecting BI Portal to ServiceCenter, the following error message displays: BI Portal initialization has failed	The SQL Server database for the RDS must be case-sensitive. The SQL Server databases for the BO Security domain and BO Universe and Document domains must be case-insensitive.
SCR 33878	When installing the Business Objects server from the hard drive and not the physical CDs, there is an error message about missing xxx.cab files.	Copy the contents from the three Business Objects CDs to the server under the same directory; for example, BO_Install. Run the autorun.exe from the BO_Install directory instead of from Business Objects CD1.

Starting and stopping Tomcat using the default settings on AIX and UNIX

Add the following commands to a shell script and then run the script, or type the commands.

To manually start Tomcat using the default path and memory settings:

Type the following from the command line:

```
JAVA_HOME=/usr/bin/peregrine/common/jdk1.3
TOMCAT_HOME=/usr/bin/peregrine/common/tomcat4
OS_NAME=`/bin/uname -s`
OAA_INF=$TOMCAT_HOME/webapps/oaas/WEB-INF
LD_LIBRARY_PATH=$OAA_INF/lib:$OAA_INF/lib/$OS_NAME:$OAA_INF
/lib/$OS_NAME
/ServiceCenter4:$LD_LIBRARY_PATH
CATALINA_OPTS="-server -Xms256m -Xmx512m"
export JAVA_HOME TOMCAT_HOME LD_LIBRARY_PATH CATALINA_OPTS
$TOMCAT_HOME/bin/startup.sh
```


Additional instructions for Solaris

For Solaris operating systems using ServiceCenter, add the following line :

```
/usr/ucblib after $LD_LIBRARY_PATH
```

Additional instructions for AIX

For AIX operating systems, substitute LIBPATH for LD_LIBRARY_PATH.

To manually stop Tomcat:

Type the following on the command line:

```
JAVA_HOME=/usr/bin/peregrine/common/jdk1.3  
TOMCAT_HOME=/usr/bin/peregrine/common/tomcat4  
export JAVA_HOME TOMCAT_HOME  
$TOMCAT_HOME/bin/shutdown.sh
```

OAA-related known issues

The following table describes OAA-related known issues.

Document ID	Known issue	Workaround
SCR 30185	The Peregrine OAA does not support the same time zones that are supported by the Windows OOTB. The time zone defined by the browser is used by default if a cookie with override settings is not installed. This condition occurs if the browser-provided time zone is not in the Peregrine list of localized strings. You can view an IDS tag in the instructions for the specific files.	<p>Use one of the following two workarounds to resolve this issue:</p> <ul style="list-style-type: none"> ■ Select an equivalent time zone that is supported. <p>–OR–</p> <p>Add the missing time zone tag and localization to the string file to ensure it is included in the localized strings. The following example shows modification of the time zone IDS string tag for <i>Paris</i>: <i>tz code</i></p> <p>Europe/Paris" becomes IDS token "tzEurope_Paris</p> <p>In <i>tzCODE</i>, <i>CODE</i> is the international time zone code with the forward slash character (/) that is replaced with an under bar character (_).</p>

Document ID	Known issue	Workaround
SCR 30225	<p>When personalizing a menu that you created using the <i>My menu</i> portal component, the following options do not work:</p> <ul style="list-style-type: none"> ■ You cannot modify an existing item on the Entries collection. ■ You cannot use the straight-forward options to create a sub-menu and add items to the sub-menu. 	<p>Use the following steps to modify an existing item on the Entries collection:</p> <ol style="list-style-type: none"> 1 Remove the item you want to modify using the Remove checkbox. 2 Click Add link to add a new menu item and apply the previous conditions, including the necessary changes to the new item. <p>Next, use the following steps to use the straight forward options to create a sub-menu and add items to a sub-menu.</p> <ol style="list-style-type: none"> 1 Log in as a user that with personalization rights. 2 From <i>My Menu</i>, click the personalization wrench icon. 3 Click Add link to add a sub-menu item to the Entries collection. 4 Enter the required details in the <i>New Document Details</i> dialog and click OK to return to the Document Details dialog. Your new sub-menu item now displays in the collection. 5 Click Submit Changes to return to the <i>My menu</i> dialog. 6 Click the image link created for the new sub-menu item to display the new sub-menu page.
SCR-30276	<p>When you stop the execution of a Script Poller after a single execution by returning NULL from the ECMA Script function, the following error message is generated in the archway log file:</p> <pre>ERROR [main] GetitAnonymouse(0) - Script executed successfully but returned no data</pre> <p>This message is a warning, not an error.</p>	<p>You can disregard this as an error message. The message is correct but should be classified as a warning only.</p>

Related documentation

The complete set of documentation for BI Portal includes:

- *BI Portal Administrator's Guide* – provides an overview of Peregrine OAA and BI Portal, customizing and using the Peregrine Portal, and configuring the Administration module and adapters.
- *BI Portal Installation Guide* – provides information on installing and configuring the application servers, Web servers, and components necessary to run BI Portal.
- *BI Portal User's Guide* – provides information on standard reports and how to create and work with both standard and custom reports.
- *Reporting Data Store Administration Guide* - provides information about the customization of Reporting Data Store (RDS) and other related BI Portal components.

These documents are available on the installation media in the `\SupportFiles\documentation` directory.

Upgrades

If you are planning to upgrade to a new BI Portal version, follow the instructions provided in the *BI Portal Installation Guide*.

Language support

The BI Portal 5.1 product is available in English only.

Third-party products

Peregrine products often integrate third-party products using open source standards. The Peregrine Customer Support Web site contains specific statements about the support of third-party products and open source standards.

Need more information?

The Customer Support Web site contains resource information about third-party products, the Compatibility Matrix, documentation, and customer support contact information. You can locate this information on the Peregrine Customer Support Web site at <http://support.peregrine.com>.

Education services

For a complete listing of Peregrine training courses, see the *Peregrine Education Service* Web site.

Corporate headquarters

See the Peregrine Systems corporate Web site for global office locations, products news, and contact information. Start your browser and navigate to <http://www.peregrine.com>.

