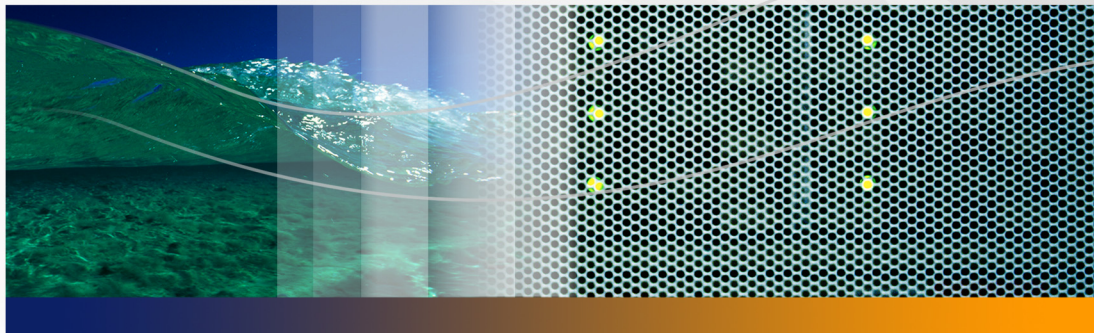


Peregrine Systems, Inc.

BI Portal 5.2



Release Notes

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BI Portal 5.2 Release Notes

Welcome to Peregrine Systems, Inc. BI Portal 5.2. Release Notes contain an overview of new features, describe known issues with this release, and provide instructions to access information from other sources, such as the Peregrine Customer Support Web site. Before you begin, 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. Refer to the packing list included with your shipment for a complete description of the media provided.

BI Portal is a business intelligence tool for advanced analysis and data mining capabilities that transform unrelated, detailed information from ServiceCenter and AssetCenter 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 and AssetCenter. 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 predefined 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 5.2 release, review the following information:

- [Key features of BI Portal on page 6.](#)
- [New features on page 8.](#)
- [Compatibility Matrix on page 8.](#)
- [Software Change Requests and fixed issues on page 9.](#)
- [Search the KnowledgeBase on page 12.](#)
- [Known issues on page 13.](#)
- [Documentation on page 21.](#)
- [Language support on page 22.](#)

Key features of BI Portal

BI Portal transforms unrelated, detailed information into meaningful, business focused-intelligence. BI Portal is an advanced analytic and reporting tool that uses data from multiple asset sources to create an accurate picture of how asset tracking, expense control, and process automation are working across the enterprise. BI Portal users generate drill-down reports or define their own queries to identify relationships and trends that are not visible through static reporting.

BI Portal enables the IT organization to understand the type and location of assets, IT fiscal performance, and compliance and risk management across multiple dimensions, such as time, business unit, department, and geographic location.

BI Portal empowers IT and business users to look at a pool of common variables defined across ServiceCenter and AssetCenter.

ServiceCenter includes 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.

BI Portal also integrates directly with the AssetCenter Portfolio, Financial Management, and Contracts Management. BI Portal helps business users to determine how to best align their goals with those of the organization by understanding how IT impacts their day-to-day operations.

Built on RDS

BI Portal extracts ServiceCenter and AssetCenter 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 and asset 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 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.

New features

BI Portal 5.2 includes the following new features:

- The ability to analyze Portfolio, Financial, and Contract Management aspects of your IT organization.
- Multiple data sources using AssetCenter and ServiceCenter as the back-end.
- A set of twenty (20) base reports for AssetCenter that provide insight into the critical success factors which drive effective enterprise asset management.

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

- New images that are generic to all OAA themes.
- Business Objects, version 6.5.1.
- The *Reporting Data Store (RDS) for AssetCenter Administration Guide* for the RDS for AssetCenter schema, Connect-It Scenario, universe, and reports.

Compatibility Matrix

The Compatibility Matrix lists supported versions of operating systems, browsers, Peregrine products, and other compatibility and support information. To access the Compatibility Matrix:

- 1 Use a browser to navigate to the Peregrine Customer Support Web site at <http://support.peregrine.com>.
- 2 Log on with your Customer ID and password.
- 3 From the left navigation pane, click **Product Information > Service Management > BI Portal > Compatibility Matrices > Product Version**.

Software Change Requests and fixed issues

BI Portal 5.2 includes fixes for Software Change Requests (SCRs). To view the SCRs included in this release:

- 1 Use a browser to navigate to the Peregrine Customer Support Web site at <http://support.peregrine.com>.
- 2 Log in with your Customer ID and password.
- 3 From the left navigation pane, click **Product Information** > **Service Management** > **BI Portal** > **Release Notes**.
- 4 Select the version of the Release Notes you want to view.

BI Portal enhancements and issues fixed in this release

The following table describes BI Portal issues fixed in this release.

SCR	Description
SCR 30949	Prefixes are no longer truncated when the BI Portal group name prefix matches the ServiceCenter application group name prefix.
SCR 32268	When using the interactive menu to remove sections from reports that contain sections, the report table correctly displays the title of the report.
SCR 32899	You do not have to remove the prefix from the personal category prefix before deleting the category. You can update or delete the BIPGroupName if it contains an underscore character.
SCR 32988	In a UNIX environment, all the charts properly display.
SCR 33000	The correct contact sort order displays when running an MS SQL Server database with contact-based authentication.
SCR 33233	The RDS database initializes when using the Sprinta <code>com.inet.tds.TdsDriver</code> driver.
SCR 33417	When using the SQL Server 2000 database with case-sensitivity, you no longer receive an error message when connecting BI Portal to ServiceCenter.
SCR 33878	You can install Business Objects server from either the hard drive or the installation CDs.
SCR 35767	BI Portal has new images that are similar to other OAA applications.

OAA issues fixed in this release

The following table describes enhancements to OAA as well as issues fixed in this release.

SCR	Description
SCR 9547	When possible, focus is now set to the first field with a problem identified during validation.
SCR 24676	The installation process now uses a WAR file for application deployment.
SCR 27296	You can now order the application tabs and the navigation menu items by specifying the associated module names for the items in the order desired. These settings are visible on the Themes tab.
SCR 27366	The Session KeepAlive administrative setting sets the behavior of session timeout. When Yes (true), user sessions do not time out while users navigate within the portal. When navigating outside the portal, they must return within the session timeout period or the session will expire. Set this value to No (false) for standard web application behavior: the session will expire after an inactivity time equal to the session timeout period. The default setting is Yes.
SCR 27473	The page preview capability is available through personalization. On the list personalization form, there is a field for defining the preview size. This value, divided by the maximum row count per page, dictates the maximum number of preview pages listed.
SCR 27977	Peregrine Portal configuration can now be inherited in a fashion similar to personalization inheritance. See the BI Portal Administration Guide for details.
SCR 28251	CLASS for HTML elements replaced the use of STYLE attributes in XSL style sheets.
SCR 28299	There is now a personalization option for disabling the link in a list.
SCR 28468	Application deployment now uses a WAR file.
SCR 28521	Subdocuments on docExplorer forms are now read-only by default, and the option setting does not affect the drill-down state.
SCR 28584	You can make a read-only text field scrollable through personalization or by adding an attribute of <code>scroll="true"</code> to the schema.
SCR 28650	An alternate location is now available for saving personalizations as a file.
SCR 28702	When interacting with ServiceCenter, an OAA-based application now uses the application version rather than the RTE version when determining which version of a schema to load. The RTE version only determines which shared library to load for proper communication with the ServiceCenter server.
SCR 28733	Users can now create ECMA script extensions. Administrators can extend a script to override script behavior without having to edit the original script.
SCR 28825	All Get-It applications are now HIPAA compliant regarding password and password expiration management.

SCR	Description
SCR 29346	Contents of parent message are no longer propagated to child when creating a new child if an id element is present.
SCR 29381	Peregrine Portal configuration can now be inherited in a fashion similar to personalization inheritance. See the BI Portal Administration Guide for details.
SCR 29778	The Require Integrated Windows Authentication option works correctly.
SCR 29783	There are now fields for specifying pop-up window sizes through personalization. These values are specified in pixels.
SCR 30185	The timezone name no longer produces a missing timezone message.
SCR 30629	The new <code>getit.personalization.bva</code> role provides the ability to customize the My Business Website menus.
SCR 30992	You can now order the application tabs and the navigation menu items by specifying the associated module names for the items in the order desired. These settings are visible on the Themes tab.
SCR 31978	The SCAdapter now properly re-authenticates after a connection failure.
SCR 32066	The OAA date-time widget works correctly for all values.
SCR 32125	OAA no longer attempts to open the META-INF directory as a manifest file.
SCR 32198	Fields specified in the schema with a type of URL now display correctly as links on forms.
SCR 32402	You can now download the <code>local.xml</code> file from the Administration page.
SCR 32836	When executing the OAADeploy utility, the <code>-logFile</code> and <code>-logToStdOut</code> command line parameters support outputting to a log file and to stdout, respectively. Logging to standard out is the default. The log file is always appended to prevent overwriting previous information. Each new log session begins with a date and time.
SCR 33001	After you save the settings for a component on the Admin page, you stay on the settings page for that component and do not return to the Control Panel.
SCR 33134	The new portalDB <code>getit.timezone</code> capability word controls access to the Portal's time zone component.
SCR 33415	Specifying an accessible title in the schema is now supported. See the Administration Guide for details.
SCR 33556	The <code>enableBrowserCaching</code> option available using the Admin settings works correctly. If you previously set this to false to enable caching, you can now set it to true (the default state).
SCR 33718	Subtype propagation with a type of path now works without error when the path contains a slash (/).
SCR 33894	Subtype is no longer lost when returning to a parent from a subdocument.
SCR 33992	A new Submit button animation on the parent form when returning from a submitted pop-up prevents loss of data changes made in the pop-up.
SCR 34345	The new <code>getit.layout</code> capability word permits personalization of the portal.

Search the KnowledgeBase

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

To search the KnowledgeBase:

- 1 Use a browser to navigate to the Peregrine Customer Support Web site at <http://support.peregrine.com>.
- 2 Log in with your Customer ID and password.
- 3 From the left navigation pane, click **KnowledgeBase**.
- 4 Type one or more keywords to filter the search, then click **Search**.

Known issues

The following tables contain known issues about BI Portal, OAA, and the installation.

BI Portal

The following table describes BI Portal 5.2 known issues.

SCR	Known issue	Workaround
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. You see the following error message:</p> <p>An error has occurred during the operation (19002). Error: WebIntelligence SDK / JSP Exception --- Number :1121 --- javaError : WISDK Specific Exception --- Description : Could not retrieve category. Check rights, category path, or category name</p>	Wait several minutes and retry. You can then successfully delete the new group.
SCR 30291	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.	Ensure that the same items are selected in both the Categories list and the Groups list.
SCR 32190	ServiceCenter out-of-box data is incorrect and should not be used for testing purposes.	Do not use ServiceCenter out-of-box data for testing purposes. Instead, use the procedures in the BI Portal Installation Guide to load default data that is shipped with BI Portal 5.2.
SCR 32620	The ServiceCenter Economic Impact of SLA Failures report may lose some formatting of chart text.	This is a known issue with Business Objects that is expected to be fixed in a later release.
SCR 33047	Fact table records are updated only when the dependent dimension table records are changed.	If the related dimension records are changed, refresh the fact table records accordingly.

SCR	Known issue	Workaround
SCR 33876	RDS connector names were changed and errors occur when running the RDS connector scenario.	Do not change the connector names defined in RDS Connect-It scenarios. There is logic dependency on these names.
SCR 34714	The default name for a dimension table in BI Portal 5.1 and earlier is the first 8 letters of the original table, capitalized, with the suffix _D. For example, the probsummary table in ServiceCenter becomes PROBSUMM_D and the amCostCenter in AssetCenter becomes AMCOSTCE_D. BI Portal 5.2 increases the convention to 15 characters, allowing for more meaningful names.	To be compatible with older installations, an exception was made for the probsummary table. You must update custom tables that you added to the BI Portal 5.1 scenario to reflect the change.
SCR 34927	On the Save, Send and Publish screens, the radio button options revert back to defaults.	None. The actual options selected take effect.
SCR 34946	You cannot view uploaded PDF files if you are using Acrobat Reader 6.0 or later. This is identified as Business Objects bug ID 1093727.	Use Acrobat Reader 5.0.
SCR 35409	Under certain conditions, the ServiceCenter tab appears on the BI Portal Admin page even though you are not using ServiceCenter and the status of the ServiceCenter adapter shows as disconnected.	This is because ServiceCenter adapter components are deployed. It does not affect the application.
SCR 35581	In drill mode, when you click the empty row or column header, an error screen with only the Cancel button appears. This is identified as Business Objects bug ID 1104052.	None. This Business Objects issue is a candidate defect that will be added to the future release of Business Objects.
SCR 35673	Reports with drill-through capability let you navigate from parent to a child report. While viewing the child report, you lose the context if you use the browser Back button to navigate to the parent report. This causes the top bar menu functions like Save, Send, Publish, Download, and Schedule to have the child reports context instead of the parent report.	Return to the main list and choose the parent report again.


SCR	Known issue	Workaround
SCR 35736	The rds_ac Connect-It is set to run once every 24 hours during the period from 8:00 AM to 6:00 PM. This means that the very first time you start this scenario, if it is not in this time frame, the scenario will not start until midnight.	You can start the scenario after 6:00 PM or change the periodical time to the time that suits the environment, such as 0:00-24:00. Refer to the <i>Connect.It User Guide</i> , Chapter 12 for information about setting schedulers.
SCR 35858	When you open any crosstab report with two cells side by side without borders between the cells, then right-click in the cell to display the interactive menu and select the Format Cell option, you get the Unterminated string constant error. This is identified as Business Objects bug ID 1104325.	None. Business Objects is addressing this issue.
SCR 35861	In the Asset Tracking report, drilling to the detail of the cells returns no data.	You must correct the mapping function for the BI_RETIREDATE field in the AMASSET_D table. See the procedures on page 16 at the end of this Known Issues section.
SCR 35933	BI Portal 5.2 has the limitation on Slowly Change Dimension (SCD) fields for all types of Portfolio AssetCenter tables which are computers, software installs and assets, because of the child-parent relationships. It is not possible to keep history on any fields for these types of records.	None.
SCR 35968	An HTTP 500 error message displays on the screen when trying to add a field to a table using the interactive menu.	<p>Reports using the special drill-through link require all relevant axes (column and row headers) to give the link proper context. Using the Remove function to eliminate a grouping field may result in a #MULTIVALUE error where the link would appear.</p> <p>This is designed behavior for the formula. Without the proper context, the link cannot be built.</p> <p>As a best practice, avoid removing fields from reports when used in row and column headers, as this will drastically change the report context.</p>
SCR 35988	After publishing Base Documents, report names in the title bar may appear to have plus (+) signs.	The plus signs disappear after a few viewings.

SCR	Known issue	Workaround
SCR 35999	When SLA array structure information is changed for SLA availability or response, Connect-It 3.4.1 does not remove the old array structure records before adding the new set of these array structure records. When the update occurs in SLA, the SLA availability table and SLA response table in RDS will have more records than ServiceCenter.	Get the correct data by selecting the records with the correct <i>last modification</i> time and ignore the records that have the old <i>last modified</i> timestamp.
SCR 36009	When using RDS for AssetCenter, the update sync does not recognize changes from AssetCenter to the RDS if the AssetCenter server and data delay time zones are not set to default.	To synchronize the time zones correctly for the rds_ac . scn scenario, open the Connect-It Service Console. Configure the rds_ac service from the Determine Server Delay screen. Set the Time Zone of the Server and Time Zone of the Pointer correctly.
SCR 36061	There is a limitation for BI Portal 5.2 e-mail notification. The e-mail notifications for any external e-mail systems will not work for BI Portal users who are populated from the AssetCenter emp1Dept source. These BI Portal users still receive the documents sent to them in the <i>inbox</i> of the BI Portal window.	None.

Correcting the mapping function for the BI_RETIREDATE field (SCR 35861)

Before you run the rds_ac . scn initial sync, correct the mapping of the BI_RETIREDATE field in the AMASSET_D table.

To correct the mapping for the BI_RETIREDATE field:

- 1 Open the rds_ac . scn scenario from the RDS_HOME\c i t directory.
- 2 Highlight the **Mapping** connector and click the **Mappings** tab.
- 3 Highlight **Source/Mapping 'amPortfolioSrc-AMASSET_Initial'** and click **Edit.** 
- 4 Modify the mapping of BI_RETIREDATE .
 - a Delete all the original mapping script.

- b Replace the old mapping script with the following new mapping script.

```
if [Asset.dDispos] <> "" then
    retval = retdate([Asset.dDispos])
else
    retval = retdate([Asset.dSchedRetire])
end if
```

- c Click the check box to ensure syntax checking is complete, click **OK** to save the modification, then click **Mappings**.


- 5 Highlight **Source/Mapping 'amComputerSrc1-AMASSET_Initial'** and click **Edit**. 

- 6 Modify the mapping of BI_RETIREDATE.

- a Delete all the original mapping script.
- b Replace the old mapping script with the following new mapping script.

```
if [Portfolio.Asset.dDispos] <> "" then
    retval = retdate([Portfolio.Asset.dDispos])
else
    retval = retdate([Portfolio.Asset.dSchedRetire])
end if
```

- c Click the check box to ensure syntax checking is complete, click **OK** to save the modification, then click **Mappings**.

- 7 Highlight **Source/Mapping 'amAssetSrc-AMASSET_Updates'** and click **Edit**. 

- 8 Highlight the BI_RETIREDATE element from the (rdsdb) pane.

- a Click the plus (+) sign in the middle pane section.

- b Replace the old mapping script with the following new mapping script into the Mapping script area.

```
if [dDispos] <> "" then
    retval = retdate([dDispos])
else
    retval = retdate([dSchedRetire])
end if
```

- c Click the check box to ensure syntax checking is complete, click **OK** to save the modification, then click **Mappings**.

- 9 Highlight **Source/Mapping 'amPortfolioSrc1-AMASSET_Updates'** and click **Edit**. 

- 10 Highlight the BI_RETIREDATE element from the (rdsdb) pane.

- a Click the plus (+) sign in the middle pane section.
- b Replace the old mapping script with the following new mapping script into the Mapping script area.

```
if [Asset.dDispos] <> "" then
    retval = retdate([Asset.dDispos])
else
    retval = retdate([Asset.dSchedRetire])
end if
```

- c Click the check box to ensure syntax checking is complete, click **OK** to save the modification, then click **Mappings**.

- 11 Save the scenario.

- 12 Close the Scenario builder window.

Installation known issues

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

SCR	Known issue	Workaround
N/A	The instructions for changing an application server's memory settings is not available.	Refer to your particular application server's documentation for these instructions.
N/A	The memory size variable setting (or amount of java heap memory) must be at least 256 MB, but 512 MB is recommended.	Use the following settings: -Xms256M -Xmx512M
N/A	Exceeding the amount of available RAM causes the JVM processes to swap to disk, reducing overall performance.	Make sure that the setting for maximum heap size is less than the free RAM available to the application server(s).
N/A	In the Installation Guide on page 154, the statements in Steps 1 a, 2 b, and 2 c of <i>Editing the connector files</i> use back slashes instead of forward slashes.	Type the code using forward slashes. For example: <code>include "C:/Program Files/Apache Group/Apache2/conf/mod_jk2.conf"</code>
N/A	In the Installation Guide on page 156, the META-INF element after the comment: # The following line prohibits users from directly accessing is missing the comment (#) character.	The correct way to type the code is: # META-INF <Location "/oaa/META-INF/"> AllowOverride None deny from all
SCR 32187	JDK no longer delivers with BI Portal.	Use JDK 1.4.2 with OAA 4.2 applications when the application is not being deployed to an application server that supplies its own JDK.
SCR 36059	In Solaris and AIX environments, labels and string tags are not translated in the BI tab of the Admin (admin.jsp) page.	Both the BI_<language>.str and bi_<language>.str files must co-exist in the WEB-INF/apps/BI directory of your OAA deployment root. For example, the file name for the English deployment is BI_en.str. You must copy the file to lower case bi_en.str and verify that both files exist before starting your BI Portal server.

OAA-related known issues

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

SCR	Known issue	Workaround
SCR 28264	Error messages on date input validation are not specific enough to be helpful.	Verify that all date/time information is entered.
SCR 29088	Field lengths are not detected and enforced for text fields; therefore, values may be truncated.	None.
SCR 29153	Resetting the server from the Home Page by adding the Control Panel portal component to the Home page causes the portal to open in the main frame. You see top and side menus twice.	Close the browser, then open a new browser.
SCR 29675	If an alternate logout page is specified for the Logout URL setting in the Administration page under the Common tab, that logout page does not display if the user's session times out.	None.
SCR 30255	Users without the get it . content capability word are prevented from adding or removing portal components on the Peregrine Portal home page.	Lack of the capability removes access to the activity on the left hand frame, but: <ul style="list-style-type: none"> ■ users can still close a portal component using the Close (X) icon. ■ when users click the wrench on the home page, an explicit error message informs them that they have no right to perform the operation, but at the same time they are logged out and must log back in.
SCR 30432	In My Business Website, a link cannot be added to a Submenu until after the Submenu is first created.	In My Business Website, you must create and submit a submenu before adding items to it.
SCR 33344	When logging into the Administration page, if the first attempt with one username fails and then the second attempt with another username succeeds, the username of the first attempt will be displayed as the current user logged in.	None.

SCR	Known issue	Workaround
SCR 33502	Logging the contents of a message with <code>Message.getContent()</code> to the archway log produces the error message Unable to parse contents if it contains any invalid XML characters.	This appears in the archway .log and happens only when you activate debug logging. A safeguard has been implemented that removes any illegal XML chars from the HTTP request stream.
SCR 34462	If there is more than one Document List portal component on the page, clicking the More (>) symbol on the portal to show additional items displays a blank page.	If there is more than one Document List portal component on the page, remove the need to display More (>) by setting the Maximum Row count for each list to be as large as necessary to display every item in the list.
SCR 34578	The label element in links and tables is not 508 compliant.	Accessible users must set their browsers to read the link text rather than the label.
SCR 34621	When a record is saved with an attachment whose file name contains an ampersand (&) character, viewing that record later produces the following error message: The entity name must immediately follow the '&' in the entity reference.	Do not use the ampersand character as part of a file name when attaching files to a record.

Documentation

In addition to this guide, the following documentation is available for the BI Portal product and for WebIntelligence. Unless otherwise noted, the documentation is available at <http://support.peregrine.com>.

Manual	Description
BI Portal Administration Guide	Provides an overview of the OAA platform. Describes how you customize the BI Portal and the OAA Administration module. Provides information about security in BI Portal, administrator functions, and configuring components after a custom installation.
BI Portal Installation Guide	Provides information about installing and configuring the application servers, Web servers, and components necessary to run BI Portal.
BI Portal User Guide	Provides base reports and describes how to create and work with both base and custom reports.
RDS for AssetCenter Administration Guide	Provides information about customizing the RDS for AssetCenter.

Manual	Description
RDS for ServiceCenter Administration Guide	Provides information about customizing the RDS for ServiceCenter.
WebIntelligence User's Guide	Describes how to use WebIntelligence for building and running queries, reporting, and analysis. This is available using the Help button of the WebIntelligence Java Report Panel, which is accessed when creating or editing reports.

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 5.2 product is available in English only.

Third-party products

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Jcrypt.java

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