

# HP IT Executive Scorecard

For the Windows® operating system

Software Version: 9.30

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## Upgrade Guide

Document Release Date: May 2012

Software Release Date: May 2012



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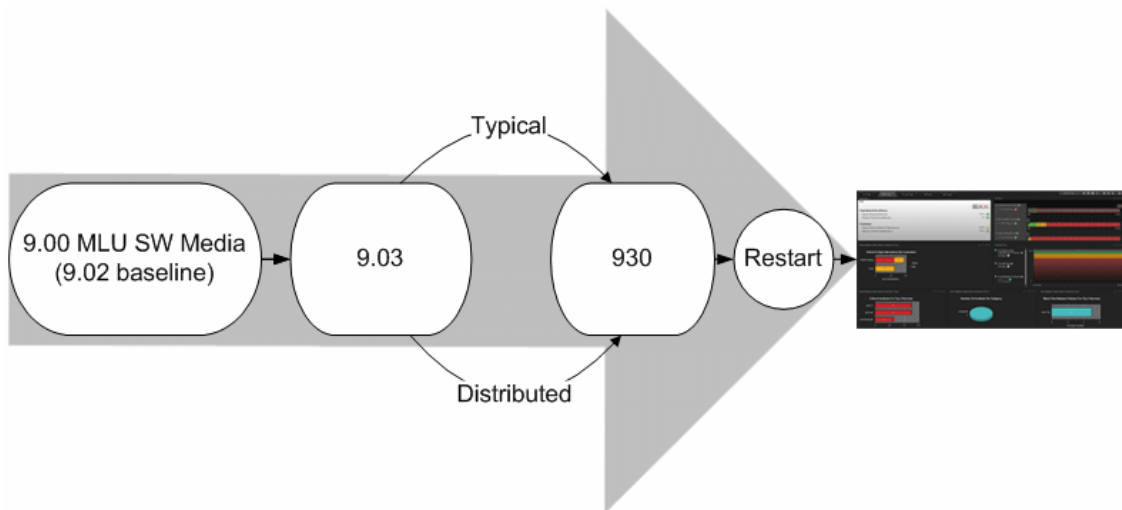
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## Upgrade to Version 9.30 - Overview

This section explains how to upgrade to version 9.30.

**Note:** The upgrade path that is currently supported is:  
**9.00 MLU SW Media (full 9.02) => 9.03 => 9.30**

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



**Important:** Connecting the new 9.3 instance to the 9.03 will disable the existing 9.03 instance

**Tip:** Duplicate the existing 9.03 schemas and connect to the duplicated schemas.

The upgrade procedure is as follows:

1. Perform the relevant upgrade procedure:
  - "Upgrade to 9.30 in a Typical Environment" on page 7
  - "Upgrade to 9.30 in a Distributed Environment" on page 24
2. Perform the "Run the Post-Upgrade Script" on page 49.

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## Upgrade to 9.30 in a Typical Environment

To upgrade to version 9.30 when you had a typical (one server) configuration in 9.03, use the following procedure:

1. "Prerequisites" below
2. "Backup and Restore Data Warehouse Databases" on next page
3. "Install Version 9.30 on a New Server" on page 9
4. "Configure SAP BusinessObjects Enterprise" on page 16

### Prerequisites

1. At the end of the upgrade process you will have to run a post-upgrade script that fixes data correctness-related issues (For details, see "Run the Post-Upgrade Script" on page 49). Contact [HP Software Support Online web site \(http://www.hp.com/go/hpssoftwaresupport\)](http://www.hp.com/go/hpssoftwaresupport) to obtain the script.
2. It is recommended to duplicate all the 9.03 schemas before starting the upgrade procedure in order to have both 9.03 and 9.30 up and running after the upgrade. To duplicate a schema in MSSQL, right-click the schema, select **Tasks > Back Up**. In the Back Up Database <file\_name> dialog box, enter the name of the back up file in the **Name** field in the **Backup Set** area, select where you want to save the duplicate in the **Destination** area, and click OK. Make sure that the back up is successful.
3. Make sure to back up the database Logins and that each user's status is enabled and not locked.
4. It is recommended to install the 9.30 version on new hardware in order to have both 9.03 and 9.30 up and running after the upgrade.
5. You must backup the 9.03 <HPXS folder>\agora\DataWarehouse\ExternalSources folder before starting the upgrade of Data Warehouse to a location on the 9.30 server (the path should be without spaces).
6. To restore the Management, Result, Target, and Staging databases, right-click **Database** in the relevant SQL server and select **Restore Database**. In the Restore Database dialog box, select **From device**, and click the button. In the Specify Backup dialog box, click **Add**. Select the duplicate file, and click **OK**.
7. Install the following on the Data Warehouse server, before you start the Data Warehouse component installation:

- a. SQLCMD utility as follows:
  - i. On the Microsoft SQL Server 2008 Enterprise Edition with SP 2 CD, run Setup.

**Note:**

- If you did not previously install Microsoft .NET Framework 3.5.1 on your server, you may be prompted to install it. When installing Microsoft .NET Framework 3.5.1, make sure that WCF Activation is unchecked.
- When installing the SQLCMD utility, make sure that the path to the utility is not enclosed in quotes (") and does not include quotes as this might cause the installation of Data Warehouse to fail.

- ii. Select **New SQL Server Standalone Installation**.
- iii. On the Feature Select screen, select **Management Tools - Basic**, unselect **Management Tools - Complete**, and finish the Wizard.

**Note:** If you want to use the default HTTP port in the Executive Scorecard installation, ensure that port 80 is available after the installation of the SQLCMD tool. For more information about the ports, see the Support Matrix document available from the [Support Site](http://h20230.www2.hp.com/selfsolve/manuals) (<http://h20230.www2.hp.com/selfsolve/manuals> or from the Installation DVD).

### 8. When using M-iCP:

Configure the Data Warehouse server to avoid low virtual memory prompts when using M-iCP as follows:

- a. Make sure that you have a hard disk capacity of at least 60G-80G.
- b. Set the server virtual memory to **system managed size**.
- c. Restart the server.
- d. In Folder Options, clear **Hide protected operating system files**.
- e. Make sure that the **pagefile.sys** size is greater or equal to your physical memory size.
- f. Make sure that you have enough free space on your system drive.

## Backup and Restore Data Warehouse Databases

The Data Warehouse database upgrade process requires you to clone the current production database into the same instance (on the same machine) and to implement the upgrade process on the cloned database.

**Before performing backup and restore make sure:**

- The database server has enough disk space to contain both the backup files and the cloned database.
- The directory structure and drives for the cloned database exist on the server.



- The source database names do not exist in the destination database. If the names do exist, they will be overwritten.

### To backup and restore the Data Warehouse databases:

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

1. Backup the source Staging, Target, Management, and Results databases using SQL Server 2008 Studio. Make sure that the backup file names are unique and that they do not exist on the destination database server.

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

2. Restore the backup of each one of the source databases on the destination server using the new names. For details, see [Data Warehouse Recovery](#) in the *Administrator Guide*.
3. Replace the string <Staging Schema\_Name> with the name of the actual Staging schema and the string <Target Schema\_Name> with the name of the actual Target schema in the **<DVD\_ROOT>/Security\_Upgrade\_Script/Upgrade\_9.03-9.3\_PreReq\_SecurityScript.sql** script.
4. Execute the **Upgrade\_9.03-9.3\_PreReq\_SecurityScript.sql** script on both the Staging and Target databases.

## Install Version 9.30 on a New Server

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

1. Ensure that you have the relevant installation settings required for the installation as described in the [Installation Checklists](#).
2. Close all Windows before you start the installation process.
3. Insert the XS media into the CD/DVD drive. The installation wizard opens.

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

**Note:** If the installation wizard does not start automatically, run the file: **<DVD\_ROOT>\Windows\_Setup\HPXS\_9.30\_setup.exe**

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

#### 4. Installation Section of Wizard

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

5. On the **Select Group** page, select the type of installation you are performing: **Typical**, and then click **Next**.
6. If necessary, on the **Select Features** page, select the component you are installing on this server, and then click **Next**.

**Common Components** are automatically selected and installed with each component.

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

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

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

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

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

**Note:** Checks not relevant to this server are passed automatically.

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

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

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

#### Run the Post-Install Wizard

1. On the **Introduction** page of the Configuration Wizard, click **Next**.
2. In the **Configuration Wizard - Introduction** page, click **Next**.

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

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

UI Element	Description
<b>Create a new database</b>	This option to creates a new Management database. Select this option when installing the first HP IT Executive Scorecard component.
<b>Connect to an existing database</b>	This option connects to an existing Management database. Select this option when the Management database has already been created while installing a previous component or when performing an upgrade.

- b. In the **Management Database - Configure Management Database Connectivity Settings** page, enter the relevant information and in the **Database name** field the name of the duplicated 9.03 Management Schema, and click **Next**.

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

UI Element	Description
<b>Host name</b>	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Management database.  <b>Note:</b> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Port &lt;1433&gt;</b>	The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.  For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).  <b>Note:</b> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	The name of the Management database.  It is recommended that you use the following database naming convention: <i>databasename_mng_upg</i>  <b>Tip:</b> Make note of the database name, as it may be needed when installing other components.

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	The password for the specified user. <b>Note:</b> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- c. In the **Management Database - Upgrade required** page, check that **Would you like to perform the upgrade?** message is displayed, and click **Next**.
- d. In the **Management Database - Configure Result Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the **Database Name** field the name of the duplicated 9.03 Result/DATA Schema, and click **Next**.

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

UI Element	Description
<b>Host name</b>	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Result database. <b>Note:</b> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>○ The named instance capability is only available for new installations.</li> </ul>

UI Element	Description
<b>Port</b> <1433>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	<p>The name of the Result database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention: <i>databasename_res_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database.</p> <p>The user must have the administrator permissions.</p>
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- e. In the **Management Database - Configure Target Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the **Database Name** field the name of the duplicated 9.03 Target Schema, and click **Next**.

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

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Target database.</p>

UI Element	Description
	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, format Host Name as follows: &lt;host_name&gt;\&lt;instance_name&gt;.</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	<p>The name of the Target database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention: <i>dbname_trg_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database.</p> <p>The user must have the administrator permissions.</p>
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- f. In the **Management Database - Configure Staging Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the **Database Name** field the name of the duplicated 9.03 Staging Schema, and click **Next**.

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

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Staging database.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	<p>The name of the Staging database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention: <i>dbname_stg_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database.</p> <p>The user must have the administrator permissions.</p>
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- g. In the **Management Database - Upgrade Summary** page, check that the upgrade was completed successfully, and click **Next**.
- h. In the **Management Database - Load a License** page, check that a valid permanent license was found, and click **Next**.

UI Element	Description
<b>Load a permanent or temporary license</b>	<p>Select to load one of the following license types:</p> <ul style="list-style-type: none"> <li>○ <b>Permanent</b> - Has no expiry date and is loaded once during the post-install.</li> <li>○ <b>Temporary</b> - Has an expiry date. On expiration, a new license must be loaded.</li> </ul> <p>To load a license, select <b>Load a permanent or temporary license</b>, click <b>Load</b>, Navigate to the license file provided by your supplier, and then click <b>Load License</b>.</p>
<b>Get an evaluation license</b>	<p>Select to load a one-off 60 day evaluation license. The remaining valid period of the license is displayed.</p> <p>Once the evaluation license terminates, you must load a temporary or permanent license.</p>

## Configure SAP BusinessObjects Enterprise

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

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

2. In the **SAP BusinessObjects Enterprise for HP XS - Configure Server Connectivity** page, enter the relevant information, and click **Next**.

UI Element	Description
<b>CMS port</b>	<p>The port number of the CMS listener. The default value is 6400. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p>
<b>Administrator password</b>	<p>The SAP BusinessObjects Enterprise Administrator password.</p> <p>This password is used only to login to SAP BusinessObjects Enterprise.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> </ul>



UI Element	Description
	<ul style="list-style-type: none"> <li>The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>
<b>Confirm administrator password</b>	Confirm the Administrator password.
<b>Tomcat port</b>	The port number of the Tomcat listener. The default value is 8080. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).

- In the **SAP BusinessObjects Enterprise for HP XS - Configure Central Management Server (CMS) Database** page, select Create a new CMS database, and click **Next**.

UI Element (A-Z)	Description
<b>Create a new CMS database</b>	Creates a new SAP BusinessObjects Enterprise for IT Executive Scorecard CMS database.
<b>Connect to an existing CMS database</b>	Connects to an existing SAP BusinessObjects Enterprise for IT Executive Scorecard CMS database.

- In the **SAP BusinessObjects Enterprise for HP XS - Configure Central Management Server (CMS) Database Connectivity Settings** page, enter the relevant information and in the **Database Name** enter the name of the new CMS Schema (9.30), and click **Next**.

Enter database configuration parameters area:

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL 2008 Server hosting the CMS database.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>The named instance capability is only available for new installations.</li> </ul>
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> (<a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).</p> <p><b>Note:</b></p>

UI Element	Description
	<ul style="list-style-type: none"> <li>■ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>■ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	<p>The name of the CMS database.</p> <p>It is recommended that you use the following database naming convention:</p> <p><i>databasename_cms</i></p>

**SQL Server authentication area:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database.</p> <p>The user must have the administrator permissions.</p>
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

5. In the **SAP BusinessObjects Enterprise for HP XS - CMS Database Configuration Status** page, make sure that the operation completed successfully, and click **Next**.
6. In the **SAP BusinessObjects Enterprise for HP XS - Configure Audit Database** page, select the **Install Audit Schema in the CMS database** option, and click **Next**.

UI Element	Description
<b>Install Audit schema in the CMS database</b>	Installs the Audit database schema as part of the CMS database previously created.
<b>Create a new Audit database</b>	Creates a new Audit database.
<b>Connect to an existing Audit database</b>	Connect to an existing Audit database.

7. In the **SAP BusinessObjects Enterprise for HP XS - Audit Database Configuration Status** page, make sure that the operation completed successfully, and click **Next**.
8. In the **SAP BusinessObjects Enterprise for HP XS - Configuration Status** page, make sure that the operation completed successfully, and click **Next**.
9. In the **Application Configuration - Configure Web Server Infrastructure Connectivity**

page, enter the relevant information, and click **Next**.

**Data related configuration area:**

UI	
Element	Description
<b>Time Zone</b>	The Data Warehouse time zone used when consolidating the data extracted from the data sources.  This property cannot be changed when upgrading.

**Web Server Configuration area:**

UI	
Element	Description
<b>HTTP port</b>	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).  <b>Note:</b> If you want to use the default HTTP port in the Executive Scorecard installation, you must ensure that port 80 is not in use by another process.
<b>HTTPS port</b>	The port of the HTTPS listener. The default port is 443. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).

**Business Objects Enterprise area:**

- This area is displayed when installing using a typical configuration.
- This area is not displayed when installing a distributed configuration.

UI Element	Description
<b>SSO shared secret</b>	Enter the SSO shared secret.  <b>Note:</b> This field is already filled with asterisks (*) when you perform an upgrade.
<b>Confirm SSO shared secret</b>	Confirmation of the SSO shared secret.

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

UI Element	Description
<b>Administrator user name</b>	The user name for the administrator.  Use this user to log into Executive Scorecard for the first time.
<b>Administrator password</b>	The password for the administrator.  <b>Note:</b> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> </ul>

UI Element	Description
	<ul style="list-style-type: none"> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>
<b>Confirm Administrator password</b>	Confirmation of the administrator password.

11. In the **Data Warehouse - SAP BusinessObjects Data Services for HP XS** page, enter the relevant information, and click **Next**.

**Enter database connectivity and authentication details:**

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the SAP BusinessObjects Data Services for IT Executive Scorecard database.</p> <ul style="list-style-type: none"> <li>■ Do not use localhost as the host name.</li> <li>■ The sum of the number of characters of the following names must not exceed 65:                             <ul style="list-style-type: none"> <li>○ The Host name FQDN</li> <li>○ The SAP BusinessObjects Data Services for IT Executive Scorecard database name</li> <li>○ The number of the server port.</li> <li>○ The Login Name.</li> </ul> </li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>■ The named instance capability is only available for new installations.</li> </ul>
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> </ul>

UI Element	Description
	<ul style="list-style-type: none"> <li>The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	<p>The name of the SAP BusinessObjects Data Services for IT Executive Scorecard database.</p> <p>It is recommended that you use the following database naming convention:</p> <p><i>databasename_bods</i></p>

**SQL Server authentication area:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database.</p> <p>The user must have the administrator permissions.</p>
<b>Password</b>	<p>The password of the specified login.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

**Database login authentication area:**

UI Element	Description
<b>New Login name</b>	<p>A new MS SQL login created for the SAP BusinessObjects Data Services for IT Executive Scorecard database.</p> <p>A SAP BusinessObjects Data Services for IT Executive Scorecard database user account with the same name is automatically created.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>The Login Name can only comprise alphanumeric characters and if required an underscore.</li> <li>Do not use XS as a new database login name because the XS user name is already used internally.</li> </ul>
<b>Password</b>	<p>The password for the new login.</p> <p>The same password is also applied to the database user account.</p>

UI Element	Description
	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The password can comprise alphanumeric characters and an underscore.</li> <li>■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.</li> </ul>
<b>Confirm Password</b>	Confirmation of the password for the new login.

**Installation directory area:**

UI Element	Description
<b>Installation directory</b>	<p>The location where you want to install SAP BusinessObjects Data Services for IT Executive Scorecard.</p> <p>The maximum allowable path length is 69 characters. In addition, the Installation directory field does not support multi-byte characters. To install the software on a system with a multi-byte locale, you must specify the installation directory with single-byte characters or use the default location.</p> <p>To run the Designer, a user requires both read and write access to the installation directory.</p>

- In the **Data Warehouse - Currency Configuration** page, enter the relevant information, and click **Next**.

**Currency area:**

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

- In the **Data Warehouse - Configure External Source & External Source Active File Location** page, enter the relevant information, and click **Next**.

UI Element	Description
<b>Location</b>	<p>The location of the external source files used by Data Warehouse.</p> <p>The default location is:  <b>&lt;Installationdirectory&gt;\agora\DataWarehouse\ExternalSources</b></p> <p>If you are performing an upgrade procedure, the location is where you copied</p>

UI Element	Description
	the external sources from the previous version in the prerequisite steps of the upgrade.
<b>Enable external source archiving</b>	<p>Select to enable archiving external data source data files.</p> <p>When you select this option, Data Warehouse backs up the flat files created during the SOURCE EXTRACT phase by the FBI Framework. This backup is used in case of fault and recovery, to execute the ETL without SOURCE EXTRACT phase, meaning independently on the data source.</p>
<b>Archive Location</b>	<p>Specify where you want to archive the external data source data files.</p> <p><b>Note:</b> Because archiving data files can be memory intensive, it is recommended to archive to a dedicated separate logical drive.</p>

14. In the **Data Warehouse - Configuration Status** page, make sure that the operation completed successfully, and click **Next**.
15. In the **Executive Scorecard - Executive Scorecard Summary** page, make sure that the operation completed successfully, and click **Next**.
16. In the **Financial Planning and Analysis - Installing FPA** page, click **Next**.
17. In the **Financial Planning and Analysis - Summary** page, make sure that the operation completed successfully, and click **Next**.
18. In the **Summary** page, make sure that the operation completed successfully, and click **Finish**.
19. Proceed to ["Additional Steps"](#) on page 41.

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# Upgrade to 9.30 in a Distributed Environment

To upgrade to version 9.30 when you had a distributed configuration in 9.03, use the following procedure:

1. "Prerequisites" below
2. "Backup and Restore Data Warehouse Databases" on next page
3. "Install BusinessObjects Enterprise" on page 26
4. "Install Data Warehouse on a Separate Server" on page 28
5. "Install Executive Scorecard on a Separate Server" on page 37

## Prerequisites

1. At the end of the upgrade process you will have to run a post-upgrade script that fixes data correctness-related issues (For details, see "Run the Post-Upgrade Script" on page 49). Contact [HP Software Support Online web site \(http://www.hp.com/go/hpssoftwaresupport\)](http://www.hp.com/go/hpssoftwaresupport) to obtain the script.
2. It is recommended to duplicate all the 9.03 schemas before starting the upgrade procedure in order to have both 9.03 and 9.30 up and running after the upgrade. To duplicate a schema in MSSQL, right-click the schema, select **Tasks > Back Up**. In the Back Up Database <file\_name> dialog box, enter the name of the back up file in the **Name** field in the **Backup Set** area, select where you want to save the duplicate in the **Destination** area, and click OK. Make sure that the back up is successful.
3. Make sure to back up the database Logins and that each user's status is enabled and not locked.
4. It is recommended to install the 9.30 version on new hardware in order to have both 9.03 and 9.30 up and running after the upgrade.
5. It is recommended to backup the 9.03 <HPXS folder>\agora\DataWarehouse\ExternalSources folder before starting the upgrade of Data Warehouse to a location on the 9.30 server (the path should be without spaces).
6. To restore the Management, Result, Target, and Staging databases, right-click **Database** in the relevant SQL server and select **Restore Database**. In the Restore Database dialog box, select **From device**, and click the button. In the Specify Backup dialog box, click **Add**. Select the duplicate file, and click **OK**.
7. Install the following on the Data Warehouse server, before you start the Data Warehouse component installation:



- a. SQLCMD utility as follows:
  - i. On the Microsoft SQL Server 2008 Enterprise Edition with SP 2 CD, run Setup.

**Note:**

- If you did not previously install Microsoft .NET Framework 3.5.1 on your server, you may be prompted to install it. When installing Microsoft .NET Framework 3.5.1, make sure that WCF Activation is unchecked.
- When installing the SQLCMD utility, make sure that the path to the utility is not enclosed in quotes (") and does not include quotes as this might cause the installation of Data Warehouse to fail.

- ii. Select **New SQL Server Standalone Installation**.
- iii. On the Feature Select screen, select **Management Tools - Basic**, unselect **Management Tools - Complete**, and finish the Wizard.

**Note:** If you want to use the default HTTP port in the Executive Scorecard installation, ensure that port 80 is available after the installation of the SQLCMD tool. For more information about the ports, see the Support Matrix document available from the [Support Site](http://h20230.www2.hp.com/selfsolve/manuals) (<http://h20230.www2.hp.com/selfsolve/manuals> or from the Installation DVD).

### 8. When using M-iCP:

Configure the Data Warehouse server to avoid low virtual memory prompts when using M-iCP as follows:

- a. Make sure that you have a hard disk capacity of at least 60G-80G.
- b. Set the server virtual memory to **system managed size**.
- c. Restart the server.
- d. In Folder Options, clear **Hide protected operating system files**.
- e. Make sure that the pagefile.sys size is greater or equal to your physical memory size.
- f. Make sure that you have enough free space on your system drive.

## Backup and Restore Data Warehouse Databases

The Data Warehouse database upgrade process requires you to clone the current production database into the same instance (on the same machine) and to implement the upgrade process on the cloned database.

**Before performing backup and restore make sure:**

- The database server has enough disk space to contain both the backup files and the cloned database.
- The directory structure and drives for the cloned database exist on the server.

- The source database names do not exist in the destination database. If the names do exist, they will be overwritten.

### To backup and restore the Data Warehouse databases:

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

1. Backup the source Staging, Target, Management, and Results databases using SQL Server 2008 Studio. Make sure that the backup file names are unique and that they do not exist on the destination database server.

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

2. Restore the backup of each one of the source databases on the destination server using the new names. For details, see [Data Warehouse Recovery](#) in the *Administrator Guide*.
3. Replace the string <Staging Schema\_Name> with the name of the actual Staging schema and the string <Target Schema\_Name> with the name of the actual Target schema in the **<DVD\_ROOT>/Security\_Upgrade\_Script/Upgrade\_9.03-9.3\_PreReq\_SecurityScript.sql** script.
4. Execute the **Upgrade\_9.03-9.3\_PreReq\_SecurityScript.sql** script on both the Staging and Target databases.

## Install BusinessObjects Enterprise

SAP BusinessObjects Enterprise for IT Executive Scorecard must be the first component you install.

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

1. Create a Schema in the DB server.
2. In the DB server, if you use a 64 bit operating system, run the command:  
**C:\Windows\SysWOW64\odbcad32.exe** and do not use the option: **go to Control Panel > Administrative Tools > Data Sources (ODBC)**. You can use this option on 64 bit OS.
3. In the **ODBC Data Source Administrator**, click the **System DNS** tab, and the **Add** button to add related Data Source:
4. In the **Create New Data Source** page that opens, select the SQL Server driver and click **Finish**.
5. In the **Create a New Data Source to SQL Server** page, enter the information to create the ODBC data source for your BOE database, and click **Next**.
6. In the next **Create a New Data Source to SQL Server** page, select the **With SQL Server authentication using a login ID and password entered by the user**, select the **Connect to SQL Server to obtain default settings for the additional configuration options** and

enter the **Login ID** and **Password**, **Use ANSI quoted identifiers** and Use ANSI nulls, paddings and warnings. Click **Next**.

7. In the next **Create a New Data Source to SQL Server** page, select the Schema you created before and select the **Change the default database to** option, and select the schema you created previously. Click **Next**.
8. In the Microsoft SQL Server DSN Configuration page, select **Perform translation for character data**, and click **Finish**.
9. In the **ODBC Microsoft SQL Server Setup** page click **Test Data Source**, and wait for the message **TESTS COMPLETED SUCCESSFULLY!**

### Install BusinessObjects Enterprise:

1. Close all Windows before you start the installation process.
2. Insert the XS media into the CD/DVD drive. The installation wizard opens.

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

**Note:** If the installation wizard does not start automatically, run the file: **<DVD\_ROOT>\Windows\_Setup\packages\boe\_installer\setup.exe**

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

3. In the **BusinessObjects Enterprise XI 3.1 Setup - User Information** page, insert the license key in the **Product Keycode** field. Click **Next**.
4. In the **BusinessObjects Enterprise XI 3.1 Setup - Install Type** page, select **New, Use an existing database server**, and **Enable servers upon installation**. Click **Next**.
5. In the **BusinessObjects Enterprise XI 3.1 Setup - Server Components Configuration** page, enter **6400** in the **CMS port** field and select **Configure the BusinessObjects Enterprise Administrator at a later time**. Click **Next**.
6. In the **BusinessObjects Enterprise XI 3.1 Setup - Server Intelligence Agent** page, enter the name of the node in the **Node Name** field, and the port number (**6410**) in the **Port** field. Click **Next**.
7. In the **BusinessObjects Enterprise XI 3.1 Setup - CMS Database Information** page, select **SQL Server (ODBC)** in the **CMS Database** area in the **Select existing CMS database** dropdown.
8. Click **Browse** to select the relevant data source in the **Data Source Name** field and enter the password in the **Password** field, in the SQL Server Logon dialog box. Click **OK**.
9. In the **BusinessObjects Enterprise XI 3.1 Setup page - Select Web Application Server**, select **Java Web Application Server** and **Install Tomcat application server and deploy to it**. Click **Next**.

- Click **Next** using all the default ports.

**Note:** The **BOWInstall\_0.log** Installation log file is saved in the **temp** folder.

- To login to BusinessObjects Enterprise after installation, use the following URL:  
**http://<server name>:8080/CmcApp**  
User: administrator, Password: (empty).
- In the **BusinessObjects Enterprise XI 3.1 Setup - Automatically Re-Deploy Web Applications?** page, select **Yes, automatically re-deploy the web applications**. Click **Next**.
- As you have already installed Tomcat, in the **BusinessObjects Enterprise XI 3.1 Setup - Configure Web Application Server** page, enter the server instance in the **Server Instance** field, the service name in the **Service Name** field, and the path to the Tomcat in the Application Server Installation Directory field. Click **Next** to install.

### Configure the JDBC driver:

- Copy the sqljdbc.jar into **<BOE install folder>\common\4.0\java\lib\external** directory.
- In the **<BOE install folder>\BusinessObjects Enterprise 12.0\win32\_x86\dataAccess\connectionServer\jdbc\jdbc.sbo** file add the following lines to the **<JDBCdriver>** section of MS SQL Server 2005 configuration:

```
<ClassPath>  
  <Path>C:\Program Files (x86)\Business  
Objects\common\4.0\java\lib\external\sqljdbc.jar</Path>  
</ClassPath>
```

- In the **<BOE install folder>\common\4.0\java\CRConfig.xml** file, add the following in the **<Classpath>** section of **<DataDriverCommon>**:

```
<BOE install folder>\common\4.0\java\lib\external\sqljdbc.jar;
```

## Install Data Warehouse on a Separate Server

- 

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

- Ensure that you have the relevant installation settings required for the installation as described in the "[Installation Checklists](#)".
- Close all Windows before you start the installation process.
- Insert the XS media into the CD/DVD drive. The installation wizard opens.

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

**Note:** If the installation wizard does not start automatically, run the file: <DVD\_ROOT>\Windows\_Setup\HPXS\_9.30\_setup.exe

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

#### 4. Installation Section of Wizard

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

5. On the **Select Group** page, select the type of installation you are performing: **Distributed**, and then click **Next**.
6. If necessary, on the **Select Features** page, select the component you are installing on this server, and then click **Next**.

**Common Components** are automatically selected and installed with each component. In addition, select Data Warehouse and SAP BusinessObjects Enterprise.

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

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

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

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

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

**Note:** Checks not relevant to this server are passed automatically.

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

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

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

10. In the **Post-Install**:
  - a. On the **Introduction** page of the Configuration Wizard, click **Next**.
  - b. In the **Configuration Wizard - Introduction** page, click **Next**.

c. **Configure the Management Database:**

- i. In the **Management Database - Configure Management Settings** page, select **Connect to an existing database** and click **Next**.
- ii. In the **Management Database - Configure Management Database Connectivity Settings** page, enter the relevant information and enter in the **Database Name** field the name of the duplicated 9.03 Management Schema, and click **Next**.

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

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Management database.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> (<a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	<p>The name of the Management database.</p> <p>It is recommended that you use the following database naming convention: <i>database_name_mng_upg</i></p> <p><b>Tip:</b> Make note of the database name, as it may be needed when installing other components.</p>

**SQL Server authentication:**

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

UI Element	Description
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- iii. In the **Management Database - Upgrade required** page, check that **Would you like to perform the upgrade?** message is displayed, and click **Next**.
- iv. In the **Management Database - Configure Result Database Connectivity Settings** page, enter the relevant information and enter in the **Database Name** field the name of the duplicated 9.03 Result/DATA Schema, and click **Next**.

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

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Result database.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> (<a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	The name of the Result database that was restored earlier.

UI Element	Description
	It is recommended that you use the following database naming convention: <i>database_name_res_upg</i>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	The password for the specified user. <b>Note:</b> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- v. In the **Management Database - Configure Target Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the **Database Name** field the name of the duplicated 9.03 Target Schema, and click **Next**.

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

UI Element	Description
<b>Host name</b>	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Target database. <b>Note:</b> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Port &lt;1433&gt;</b>	The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server. For more information about ports, see the Support Matrix document available from the <a href="#">Support Site</a>



UI Element	Description
	<p>(<a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	<p>The name of the Target database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention: <i>databasename_trg_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database.</p> <p>The user must have the administrator permissions.</p>
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- vi. In the **Management Database - Configure Staging Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the **Database Name** field the name of the duplicated 9.03 Staging Schema, and click **Next**.

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

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Staging database.</p> <p><b>Note:</b></p>

UI Element	Description
	<ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> (<a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</li> <li>○ The named instance capability is only available for new installations.</li> </ul>
<b>Database name</b>	<p>The name of the Staging database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention: <i>databasename_stg_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database.</p> <p>The user must have the administrator permissions.</p>
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- vii. In the **Management Database - Upgrade Summary** page, check that the upgrade was completed successfully, and click **Next**.
  - viii. In the **Management Database - Load a License** page, check that a valid permanent license was found, and click **Next**.
- d. On the **Application Configuration - Configure Infrastructure Connectivity** page, enter

the information and click **Next**.

**Enter connectivity and authentication parameters area:**

UI Element	Description
<b>Administrator user name</b>	The user name for the administrator. Use this user to log into Executive Scorecard for the first time.
<b>Administrator password</b>	The password for the administrator. <b>Note:</b> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>
<b>Confirm Administrator password</b>	Confirmation of the administrator password.

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

UI Element	Description
<b>Host name</b>	The fully qualified domain name (FQDN) or IP address of the SAP BusinessObjects Enterprise XI 3.1 server.
<b>CMS Port</b>	The port number used by the CMS listener. The default value when SAP BusinessObjects Enterprise for IT Executive Scorecard is installed as part of the Executive Scorecard installation, is 6400.
<b>Administrator User name</b>	The SAP BusinessObjects Enterprise XI 3.1 administrator user name. <b>Note:</b> This user name and the following password are used when logging in to the SAP BusinessObjects Enterprise applications.
<b>Administrator password</b>	The SAP BusinessObjects Enterprise XI 3.1 administrator password.
<b>Confirm Administrator password</b>	Confirmation of the administrator password.
<b>SSO shared secret</b>	The shared secret that is used to authenticate communications with the SAP BusinessObjects Enterprise XI 3.1 server. If trusted authentication is configured, the shared secret entered is validated against the SAP BusinessObjects Enterprise XI 3.1 server. If trusted authentication is not configured, the entered shared secret is

UI Element	Description
	configured on the SAP BusinessObjects Enterprise XI 3.1 server.
<b>Confirm SSO shared secret</b>	Confirmation of the SSO shared secret.
<b>Authentication scheme</b>	Select one of the following SAP BusinessObjects Enterprise XI 3.1 authentication schemes that contains the administrator account: <ul style="list-style-type: none"> <li>o <b>secEnterprise</b> - When the SAP BusinessObjects administrator account is a native Enterprise account.</li> <li>o <b>secLDAP</b> - When the SAP BusinessObjects administrator account originates from an LDAP user database.</li> </ul>
<b>Tomcat Port</b>	The port used by the Tomcat listener. The default value is 8080. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).
<b>Skip SAP BusinessObjects Enterprise connectivity configuration</b>	Skip the configuration.

f. **Configure and upgrade Data Warehouse:**

- i. On the **Data Warehouse - Currency Configuration** page, enter the information and click **Next**.

**Currency area:**

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

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

UI Element	Description
<b>Location</b>	The location of the external source files used by Data Warehouse. The default location is: <b>&lt;Installationdirectory&gt;\agora\DataWarehouse\ExternalSources</b> If you are performing an upgrade procedure, the location is where you

UI Element	Description
	copied the external sources from the previous version in the prerequisite steps of the upgrade.
<b>Enable external source archiving</b>	Select to enable archiving external data source data files. When you select this option, Data Warehouse backs up the flat files created during the SOURCE EXTRACT phase by the FBI Framework. This backup is used in case of fault and recovery, to execute the ETL without SOURCE EXTRACT phase, meaning independently on the data source.
<b>Archive Location</b>	Specify where you want to archive the external data source data files. <b>Note:</b> Because archiving data files can be memory intensive, it is recommended to archive to a dedicated separate logical drive.

- iii. On the **Data Warehouse - Configuration Status Location** page, check the configuration, check that the operation completed successfully, and click **Next**.

UI Element	Description
<b>Location</b>	The location of the external source files used by Data Warehouse. The default location is: <b>&lt;Installationdirectory&gt;\agora\DataWarehouse\ExternalSources</b> If you are performing an upgrade procedure, the location is where you copied the external sources from the previous version in the prerequisite steps of the upgrade.
<b>Enable external source archiving</b>	Select to enable archiving external data source data files. When you select this option, Data Warehouse backs up the flat files created during the SOURCE EXTRACT phase by the FBI Framework. This backup is used in case of fault and recovery, to execute the ETL without SOURCE EXTRACT phase, meaning independently on the data source.
<b>Archive Location</b>	Specify where you want to archive the external data source data files. <b>Note:</b> Because archiving data files can be memory intensive, it is recommended to archive to a dedicated separate logical drive.

## Install Executive Scorecard on a Separate Server

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

1. Ensure that you have the relevant installation settings required for the installation as described in the "Installation Checklists".
2. Close all Windows before you start the installation process.
3. Insert the XS media into the CD/DVD drive. The installation wizard opens.

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

**Note:** If the installation wizard does not start automatically, run the file: **<DVD\_ROOT>\Windows\_Setup\HPXS\_9.30\_setup.exe**

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

#### 4. Installation Section of Wizard

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

5. On the **Select Group** page, select the type of installation you are performing: **Distributed**, and then click **Next**.
6. If necessary, on the **Select Features** page, select the component you are installing on this server, and then click **Next**.

**Common Components** are automatically selected and installed with each component. In addition, select Executive Scorecard.

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

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

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

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

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

**Note:** Checks not relevant to this server are passed automatically.

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

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

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

10. On the **Introduction** page of the Configuration Wizard, click **Next**.

**Post-Install Wizard**

**Note:** Make sure that you installed DWH and BOE on a another server before you installed XS on this server.

1. In the **Management Database - Management Database Configuration Status** page, check that the operation completed successfully and click Next.
2. On the **License Management - Load a License** page, verify a permanent license was found and click **Next**.
3. **Configure and upgrade the Application:**
  - a. On the **Application Configuration - Configure Web Server Infrastructure Connectivity** page, enter the information and click **Next**.

**Data related configuration area:**

UI Element	Description
<b>Time Zone</b>	The Data Warehouse time zone used when consolidating the data extracted from the data sources.  This property cannot be changed when upgrading.

**Web Server Configuration area:**

UI Element	Description
<b>HTTP port</b>	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD.  <b>Note:</b> If you want to use the default HTTP port in the Executive Scorecard installation, you must ensure that port 80 is not in use by another process.
<b>HTTPS port</b>	The port of the HTTPS listener. The default port is 443. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).

**Business Objects Enterprise area:**

- This area is displayed when installing using a typical configuration.
- This area is not displayed when installing a distributed configuration.

UI Element	Description
<b>SSO shared secret</b>	Enter the SSO shared secret.  <b>Note:</b> This field is already filled with asterisks (*) when you perform an upgrade.
<b>Confirm SSO shared secret</b>	Confirmation of the SSO shared secret.

- b. On the **Application Configuration - Configure Target Database Settings** page, select the relevant option and click **Next**.

Select if you want to create a new target database or if you want to connect to an existing target database:

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

4. On the **Executive Scorecard - Executive Scorecard Summary** page, check that the operation completed successfully and click **Next**.
5. **Configure and upgrade Financial Planning and Analysis:**
  - a. On the **Financial Planning and Analysis - Installing FPA** page, click **Next** to install the Financial Planning and Analysis module.
  - b. On the **Financial Planning and Analysis - Summary** page, check that the operation completed successfully and click **Next**.
6. On the **Summary** page, check that the operation completed successfully and click **Next**.
7. Proceed to ["Additional Steps"](#) on page 41.



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## Additional Steps

Continue with the upgrade with the following steps:

"In case of disaster recovery, restore the SAP BusinessObjects Data Services Database" below

"Reactivate the Data Sources" below

"Move SAP BusinessObjects Enterprise Information" on next page

"Restart Executive Scorecard" on page 46

"Optional, When Working With a Non-English Language" on page 46

"Run the Post-Upgrade Script" on page 49

"Regenerate the Staging Target Data Store" on page 49

## In case of disaster recovery, restore the SAP BusinessObjects Data Services Database

In case of disaster recovery, restore the repository to the original data contained in it using the SAP BusinessObjects Data Service database you backed up before running the upgrade procedure. For details, see "Restore the BODS Repository" on page 1 in the *IT Executive Scorecard Release Notes*.

You do not need to restore the SAP BusinessObjects Data Service database if the upgrade process was successful.

## Reactivate the Data Sources

1. **If needed, reconnect to AM, PPM, SM Data Sources**After the installation process, if you use AM, PPM, or SM data sources, you must, using the Executive Scorecard user interface, edit the settings of the data sources you want to reactivate as some of the details must be updated, then you can reactivate the data sources.For more information, see "Integrate the Data Sources" on page 1 in the *Content Reference Guide*.
2. **If the UCMDB Content Pack was activated in 9.03**After the installation process, if you use the UCMDB data source, you must, using the Executive Scorecard Data Source Management user interface, in the UCMDB data source settings, make sure to remove the extra "00" after the port number you configured in the **Port** field..For more information, see "Integrate the Data Sources" on page 1 in the *Content Reference Guide*.
3. **If the NNM Content Pack was activated in 9.03.** If the NNM Content Pack was activated in 9.03, and if HP Network Node Manager does not need a password to connect to the shared folder (for example when the shared folder resides on the local machine), you must edit the setting of the connection and delete the password value, before you activate the NNM Content

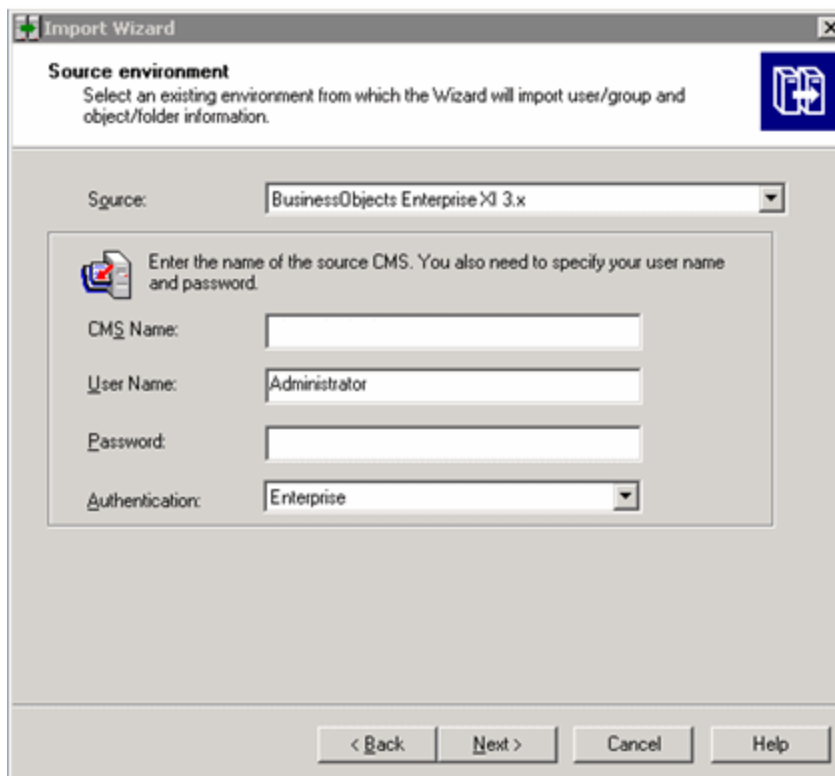
Pack. To do that proceed as follows:

- a. In the application, click **Admin > Data Source Management**.
  - b. Click the **Edit Settings** link for HP Network Node Manager.
  - c. Delete the values in the **Password** field, and perform any additional changes.
  - d. Click **Next** twice.
  - e. After the data source is successfully configured, click **Close**.
4. **Reactivate the data sources.** After completing the upgrade, all connected data sources will be in the **Deactivated** state. You must reactivate the desired data sources using the Executive Scorecard user interface. For more information, see "[Perform Tasks for Data Source Management](#)" on page 1 in the *Administrator Guide*.

## Move SAP BusinessObjects Enterprise Information

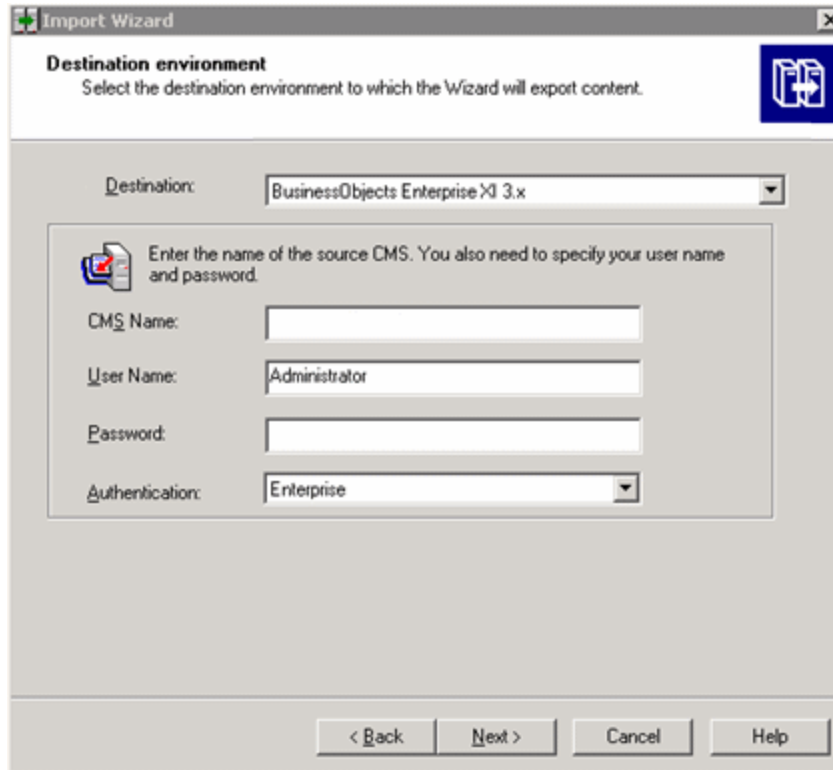
To transfer your SAP BusinessObjects Enterprise information

1. Open the **Import Wizard** in BusinessObjects 3.1, and click **Next**.
2. On the Source environment screen, in the Source field, choose **BusinessObjects Enterprise XI 3.x**, enter the required information, and click **Next**.

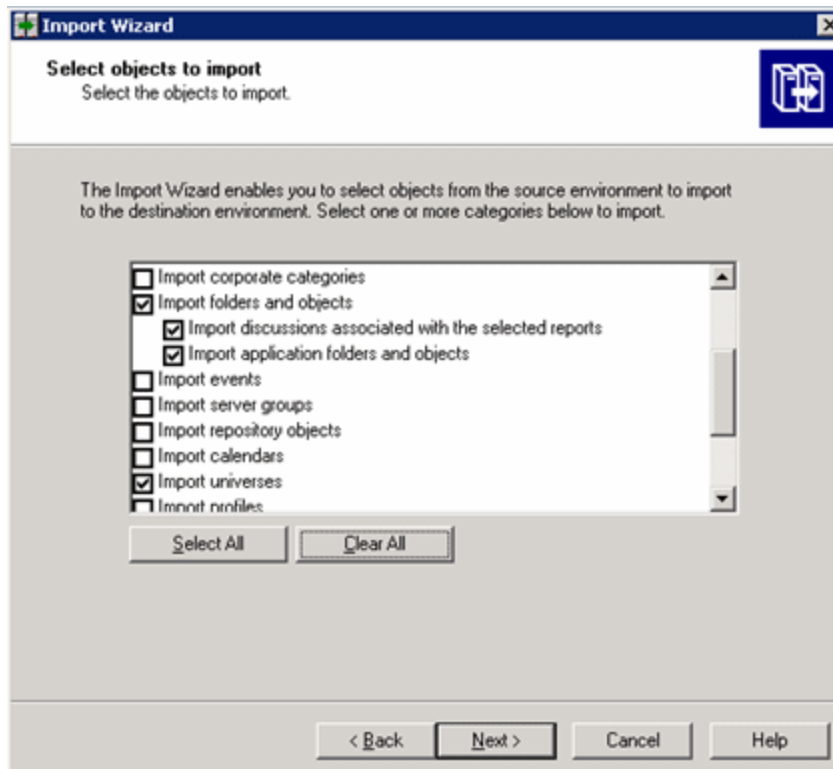


The screenshot shows the 'Import Wizard' dialog box, specifically the 'Source environment' step. The title bar reads 'Import Wizard'. Below the title bar, the text says 'Source environment' and 'Select an existing environment from which the Wizard will import user/group and object/folder information.' There is a blue icon with a white plus sign in a square. Below this, the 'Source:' dropdown menu is set to 'BusinessObjects Enterprise XI 3.x'. A sub-dialog box contains the following fields: 'CMS Name:' (empty), 'User Name:' (Administrator), 'Password:' (empty), and 'Authentication:' (Enterprise). At the bottom of the main dialog, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

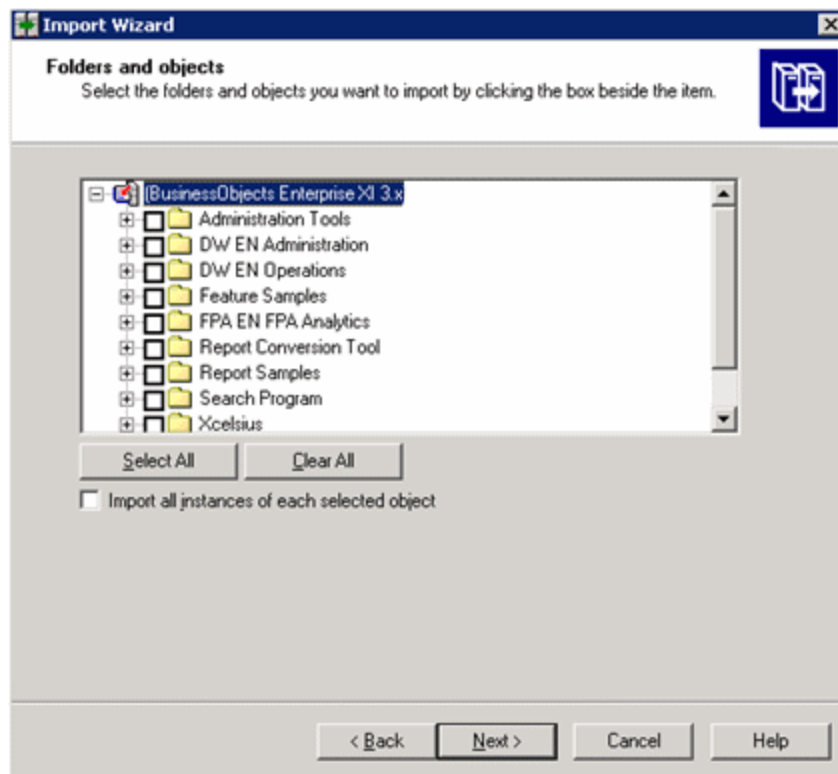
3. On the Destination environment screen, in the Destination field, choose **BusinessObjects Enterprise XI 3.x**, enter the required information, and click **Next**.



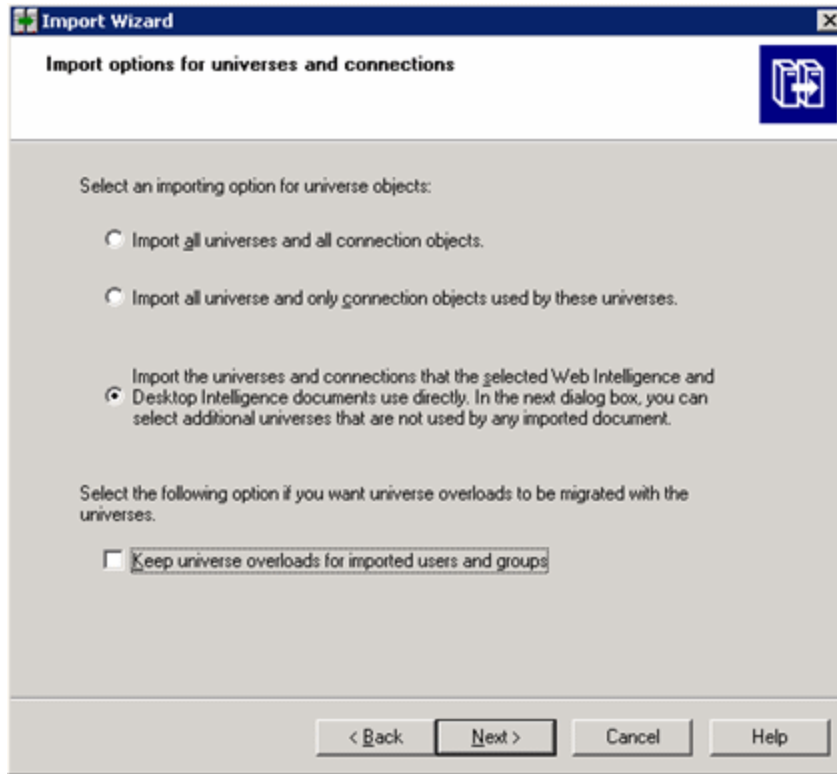
4. On the Select objects to import screen, click **Clear All**, then select **Import folders and objects**, **Import discussions associated with the selected reports**, **Import application folders and objects**, **Import universes**, and then click **Next**.



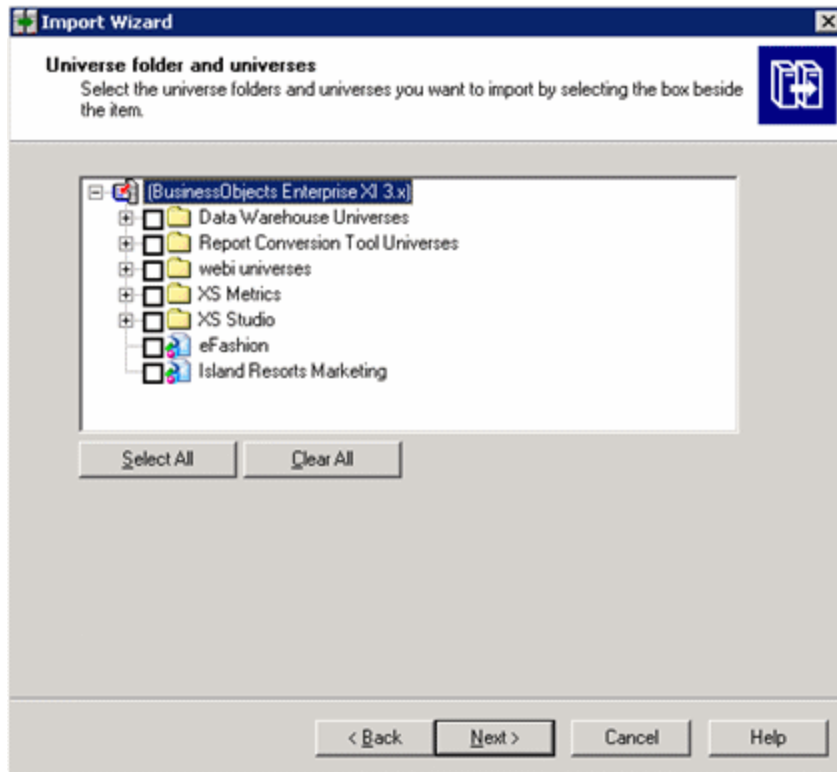
5. Continue to click **Next** until you reach the Folders and objects screen. Select the relevant folders and objects and click **Next**.



6. Continue to click **Next** until you reach the Import options for universes and connections screen. Select **Import the universes and connections that the selected Web Intelligence and Desktop Intelligence documents use directly** and click **Next**.



7. On the Universe folder and universes screen, check the relevant universes and click **Next**. The universes that are related to objects that were selected earlier are automatically selected.



- Continue to click **Next** until you reach the Ready to import screen. Review the contents of the import and click **Next**. The import process runs.
- When the import completes, click **Done** to exit, or click **View detail log** to see information about which objects were not transferred.

## Restart Executive Scorecard

After you restart the server on which Executive Scorecard is located, the backed up KPIs and pages that were prepared in the 9.03 system are displayed in the application and you can now use the Executive Scorecard application.

## Optional, When Working With a Non-English Language

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

### 1. Localize the KPI Library

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

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

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

The language code and country codes are as follows:

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

Language	Language Code	Country Code
Simplified Chinese	zh	CN
Korean	ko	KR
Russian	ru	RU

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

**Tip:**

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

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

## 2. Localize the Dashboard Pages and Components

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

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

- a. In the Executive Scorecard server, locate the <XS\_installation\_directory>\agora\glassfish\glassfish\domains\BTOA\config\uimashup\import\languages\Components\<lang>\_<country\_code>\<name>.uim.xml or <XS\_server>\agora\glassfish\glassfish\domains\BTOA\config\uimashup\import\languages\Pages\<lang>\_<country\_code>\<name>.uim.xml files relevant to the language you want to install. These .uim.xml files represent the components and the pages used in the Dashboard. **lang** is the language code and **country\_code** is the code of the country:

Language	Language Code	Country Code
Brazilian Portuguese	pt	BR
French	fr	FR
Spanish	es	ES
German	de	DE
Japanese	ja	JP

Language	Language Code	Country Code
English	en	US
Dutch	nl	NL
Italian	it	IT
Simplified Chinese	zh	CN
Korean	ko	KR
Russian	ru	RU

- b. Copy these .xml files to the **<XS\_installation\_directory>\agora\glassfish\glassfish\domains\BTOA\config\ui\mashup\import\to\load** folder.

**Tip:**

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

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

### 3. Test the installation

Check the universes in the Executive Scorecard Studio:

- a. If you do not see them, run the Load meta data JMX.
- b. If you still cannot see the universes, restart SAP BusinessObjects Enterprise and rerun the "Load meta data" JMX. For details, see the *IT Executive Scorecard Troubleshooting Guide*.

### 4. Set up the User Interface Display Language

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

- a. If you want to display the user interface in a non-English language, go to your browser **Tools > Internet Options**.
- b. In the **General** tab, click **Languages**.
- c. Add the language you want to view in the user interface and use **Move up** to move it to be the first in the list.
- d. Open a new browser and login to Executive Scorecard. The application is presented in the chosen local language.



### 5. Set up the Input and Content Language

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

## Run the Post-Upgrade Script

1. Obtain the **POSTUPGRADESCRIPT.SQL** script available in [HP Software Support Online web site](http://www.hp.com/go/hpssoftwaresupport) (<http://www.hp.com/go/hpssoftwaresupport>) to fix a few additional data correctness-related issues.
2. Run the **POSTUPGRADESCRIPT.SQL** script in the Staging database.

## Regenerate the Staging Target Data Store

Regenerate the Staging Target Data Store as follows:

1. Open CMD
2. Go to: **<HPXS>\agora\DataWarehouse\bin**
3. Execute the following commands:
  - **dw\_ds\_gen -outputdir c:\tmp\datastores\stagingtarget -datastore stagingtarget**
  - **dw\_ds\_import -inputdir c:\tmp\datastores\stagingtarget**
4. Open SAP BusinessObjects Data Services.
  - a. Click the DataStores Tab
  - b. Enter each one of the following DataStores if they exist:
    - **AMVIEW\_DS**
    - **PPMVIEW\_DS**
    - **SMVIEW\_DS**
  - c. Delete the tables in each Data Store.
  - d. You can now delete the Data Store.
5. In the application, click **Admin > Data Source Management**.
  - a. Edit the source connection details for all upgraded Content Packs and save.
  - b. Activate the relevant Content Packs.

