

Peregrine

BI Portal 5.0

Release Notes

For Windows, AIX, and Solaris

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BI Portal 5.0 Release Notes

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

The media shipped with this release comprise a complete installation of the product. Refer to the packing list included with your shipment for a description of the media.

What's in these Release Notes

These release notes include:

- Key features of BI Portal (see page 6).
- A summary of known issues (see page 7).
- Notes on related documentation (see page 13).
- Contact details for Customer Support (see page 13).

Key features of BI Portal

BI Portal empowers IT and business users to look at a pool of common variables defined across ServiceCenter, including service management, incident management, change management, inventory, and root cause analysis. Users can then readily generate drill-down reports and graphs to identify causal relationships or trends that are not seen through static reporting. Additionally, BI Portal allows users to define their own queries or metrics and publish it for all other users as well. 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 into how IT can best serve the needs of the business.

BI Portal analysis is based on pre-defined metadata stored within the RDS. This metadata is based on pre-defined business terminology which all users can use in creating queries and reports. It also contains business rules and calculations that have been defined for the business. Some of the metadata also enables access to the physical data, such as incidents, change requests, and inventory data. By providing a consistent definition of the business variables and how they are calculated, an organization is assured that all decisions are based on the same core fundamental data interpretations.

Increased velocity 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.

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.

Web-based access

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

Built on RDS

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

Known issues

You can view a list of known issues in the knowledge base by searching the Peregrine CenterPoint Web site at <http://support.peregrine.com>. Access to this page requires a current login user name and password.

Installation known issues

The following contains BI Portal installation known issues.

Issue	Temporary Solution
In WebSphere 4.0, some pie charts and reports do not display correctly.	<p>You must update the constantsIncl.jsp file.</p> <ol style="list-style-type: none"> 1 From a text editor, open constantsIncl.jsp in the Web application oaa directory. 2 Replace the line (line 24) of: <pre>request.setCharacterEncoding("UTF-8");</pre> to <pre>request = WRequestWrapper.setCharacterEncoding(request, "UTF-8");</pre> 3 Save and close the file.
During a typical UNIX installation, the installer does not ask for driver information.	<p>Copy the database jar file to the <TOMCAT>/webapps/oa/WEB-INF/lib directory.</p> <p>The jar file is specific to your database:</p> <p>The Oracle jar file classes12.jar is in <oracle_install_dir>/jdbc/lib/classes12.jar.</p> <p>The DB2 jar file db2java.zip is in <db2_install_dir>/java/db2java.zip. Copy this file and rename the db2java.zip file to db2java.jar.</p> <p>The SQL Server jar file is in Sprinta2000.jar, which you can FTP from your Windows system to this directory.</p>

Issue	Temporary Solution
The same error message occurs for different situations.	BI Portal displays the same message, Application Session has timed Out , for the following incorrect system configurations: <ul style="list-style-type: none"> ■ For BI Portal server, the database connection is not established. ■ The user ID does not exist in the Business Objects repository. ■ The application session timed out before the WebIntelligence session.
The Company Name input parameter is case sensitive.	When installing BI report server and configuring the BI Portal BI setting, the company name parameter must be uppercase.
The BI configuration program may fail to start and stop the webi service due to a known BO issue. [BO case 302410203]	This happens when it is set up as an NT service. Check the WebIntelligence Cluster service . If necessary, click Start to manually start the webi service.
Installing multiple Get-It applications and BI Portal with Tomcat causes login errors.	The classpath is too long. To correct this, add the following code in the param section of the Tomcat web.xml file. The default location is: C:\Program Files\Peregrine\Common\Tomcat4\conf <pre data-bbox="611 927 1072 1031"> <init-param> <param-name>fork</param-name> <param-value>>false</param-value> </init-param></pre>
When Get-It applications are installed on the same server prior to installing BI Portal, the uninstall does not remove BI Portal.	When the BI Portal is installed first, the uninstall removes BI Portal as well as the Get-It applications. Otherwise, BI Portal files must be removed manually.
The online help for BI Portal is not up to date.	You must copy the <i>BI Portal User's Guide</i> from the documentation directory on the CD to the following directory after installation. Copy BI_Portal_5.0_User_Guide.pdf from the CD to the webapps\oaa\ folder under Tomcat.

Issue	Temporary Solution
An error message occurs during installation if you do not have enough disk space.	You must have at least 100 MB available disk space on your Web server to install BI Portal.
The documentation in the <i>Installation Guide</i> concerning the Oracle thin client URL is incorrect.	The database URL should be: jdbc:oracle:thin:@db_host:port:service_name
When installing on a UNIX platform, if you select Tomcat but not Apache, you must manually start the Peregrine Tomcat service. [ST29420]	The standard oactl to automatically start the service does not work because it has Apache commands. See <i>Instructions to start and stop Tomcat using the default settings</i> on page 9 for the commands to manually start and stop the Tomcat Peregrine service.
The installation default maximum memory size for the application server is too low. [ST29452]	Set the maximum memory size for the application server to at least 512m. The default catalina_opts are 256m/384m. Using the custom installation, change the maximum to 512m.

Instructions to start and stop Tomcat using the default settings

Note: You can add these commands to a shell script and run the script instead of typing the commands.

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

- Type the following on the command line:

```

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

```

Note: On Solaris using ServiceCenter, add `:/usr/ucblib` after `$LD_LIBRARY_PATH`

Note: On AIX, use LIBPATH instead of LD_LIBRARY_PATH

To manually stop Tomcat:

- ▶ Type the following on the command line:

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

Software known issues

The following contains BI Portal software known issues.

Issue	Temporary Solution
The outer-join of SQL Server is treated as an equal-join. [BO case 302432483]	When the reports or ad-hoc query contains an outer-join condition, the BusinessObjects WebIntelligence query tool interprets the outer-join as an equal-join. Workaround: All Peregrine canned reports do not use outer-join; therefore, all the out-of-box canned reports return correct data for the SQL server. Generate two reports for equal and non-equal conditions to get the same results as the outer-join condition.
SQL has case insensitive support.	RDS only supports the SQL server default case insensitive database setting. When using ServiceCenter, there are records that have the same unique key values with different cases, but only one record is generated in RDS.
A Page not found error occurs when drilling on the report.	If you save reports as drillable mode, when you then open the report, it does not display as drillable. When you click Drill basing it on the default hierarchy, BI Portal generates the Page not found error. Workaround: Do not save reports as drillable mode. Click Drill to make the reports drillable after opening them.

Issue	Temporary Solution
WebIntelligence Error: WIS 00008 [BO case 302410388]	If the report has the measurements from different ServiceCenter modules aggregation measurements, BusinessObjects generates the SQL error: The query cannot run as it contains incompatible objects. See your BO administrator. Workaround: Create reports or ad-hoc queries with the aggregation measurements from one ServiceCenter module.
Scheduling a canned report generates a message indicating an error. [BO case 302424778]	From BI Portal, when users click Corporate Documents , then select Report > Schedule , fill the scheduling form, and click OK, the following message occurs: Status: Problem occurred during attempt to send the document (10451). Workaround: With the current BusinessObjects release, users cannot schedule a document that another user creates. To schedule documents without any errors, create a new document or open an existing document and republish to Corporate Documents.
The session keep alive feature does not prevent session time out if you place focus on a popup window. [ST29134]	To avoid this, modify the default session time-out in the Admin settings to be greater than 600 seconds. To change the session time-out setting: 1 From Admin > Settings , scroll to the Encoding, Locales, and Sessions heading. 2 In the Session time-out parameter, type the number of seconds that you want for the session to remain active; for example, 6000. 3 Click Save , then click Reset Server .

BusinessObjects known issues

The following table contains reported BusinessObjects-related issues.

Case Number	Defect Number	Description
302404326	1074138	Users cannot add a connection to MS SQL SERVER 2000 through BO APIs.
302406873	1076208	A universe error occurs.
302409955	1075995	The image is not downloaded into Excel.

Case Number	Defect Number	Description
302410203		An Open Session Error occurs. Workaround: 1 Copy BOMain.key into the nodes directory. 2 Restart webintelligence .
302410388	1079520	Multiple aggregation measurements reports an SQL incompatible error.
302410399	1076001	The configuration tool closes when choosing Service Parameters > User Account > Next .
302418598	1078098	The View/Save as PDF function fails if a skin is used.
302419178		The Editor screen does not redraw.
302419179	1037670	The Relative Position flag is not recognized.
302424778	1075492	A system error occurs when trying to schedule a document.
302425367		The Administrator console cannot connect to security domains.
302426826	1079742	The Show Section When Empty property is broken.
302431909		Formatting a date-time field in a prompt generates an error for SQL Server and DB2.
302432236		Average() formula gets an error on SQL server and DB2, but not Oracle. Workaround: 1 Create a user-defined variable with the average calculation. 2 Using the function average ([<user define variable>]), drop the variable into the cell. The average calculates without error.
302432483		The SQL server outer join generates an incorrect SQL statement.

Related documentation

The complete set of manuals for BI Portal 5.0 includes:

- *BI Portal Administrator's Guide*—providing an overview of Peregrine OAA and BI Portal, customizing and using the Peregrine Portal, and configuring the Administration module and adapters.
- *BI Portal Installation Guide*—providing information on installing and configuring the application servers, Web servers, and components necessary to run BI Portal.
- *BI Portal User's Guide*—providing information on standard reports and how to create and work with both standard and custom reports.

These documents are available on the installation CD in the ...\\documentation directory.

Need further assistance?

For further information and assistance with this release, you can download documentation or schedule training.

Customer Support

For further information and assistance, contact Peregrine Systems' Customer Support at the Peregrine CenterPoint Web site.

To contact customer support:

- 1 In a browser, navigate to <http://support.peregrine.com>
- 2 Log in with your user name and password.
- 3 Follow the directions on the site to find your answer. The first place to search is the KnowledgeBase, which contains informational articles about all categories of Peregrine products.
- 4 If the KnowledgeBase does not contain an article that addresses your concerns, you can search for information by product; search discussion forums; and search for product downloads.

Documentation Web site

For a complete listing of current BI Portal documentation, see the Documentation pages on the Peregrine Customer Support Web.

To view the document listing:

- 1 In a browser, navigate to <http://support.peregrine.com>.
- 2 Log in with your login user name and password.
- 3 Click either **Documentation** or **Release Notes** at the top of the page.
- 4 Click the BI Portal link.
- 5 Click a product version link to display a list of documents that are available for that version of BI Portal.
- 6 Documents may be available in multiple languages. Click the Download button to download the PDF file in the language you prefer.

You can view PDF files using Acrobat Reader, which is available on the Customer Support Web site and through Adobe at <http://www.adobe.com>.

Important: Release Notes for this product are continually updated after each release of the product. Ensure that you have the most current version of the Release Notes.

Education Services Web Site

Peregrine Systems offers classroom training anywhere in the world, as well as “at your desk” training via the Internet. For a complete listing of Peregrine’s training courses, refer to the following web site:

<http://www.peregrine.com/education>

You can also call Peregrine Education Services at +1 858.794.5009.



September 30, 2003