

HP Storage Essentials Storage Resource Management Report Optimizer

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Installation Guide

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1 Installing and Configuring SRM Report Optimizer on Microsoft Windows

This chapter provides instructions for installing and configuring SRM Report Optimizer on Microsoft Windows.

This chapter contains the following topics:

- [System Specifications](#), page 2
- [Requirements](#), page 2
- [Installing the Report Database](#), page 4
- [Performing a fresh installation of SRM Report Optimizer](#), page 7
- [Upgrading SRM Report Optimizer](#), page 8
- [Installing the HP Live Network connector \(LNc\)](#), page 46
- [Uninstalling SRM Report Optimizer 6.2](#), page 47
- [Uninstalling the Report Database](#), page 47
- [Configuring SRM Report Optimizer](#) on page 47
- [Tuning the SRM Report Optimizer server](#), page 66
- [Troubleshooting](#), page 73

After installing and configuring SRM Report Optimizer, you must finish configuring HP Storage Essentials. For details, refer to the “Required Configuration Steps After Installing or Upgrading HP Storage Essentials” chapter of the HP Storage Essentials installation guide.

After completing the installation and configuration, you should refer to the SRM Report Optimizer Quick Start Guide for information about using SRM Report Optimizer.

System Specifications

Single server refers to SRM Report Optimizer and HP Storage Essentials on a single server. Dual server refers to SRM Report Optimizer and HP Storage Essentials on separate servers.

- Memory
 - Single server: 16 GB
 - Dual server: 12 GB
- Disk space
 - Single server with ARCHIVING and RMAN backup off: 300 GB
 - Single server with ARCHIVING and RMAN backup on: 450 GB
 - Dual server with ARCHIVING and RMAN backup off: 200 GB
 - Dual server with ARCHIVING and RMAN backup on: 350 GB
- CPU: 2.33 GHz +
 - Single server: At least quad-core
 - Dual server: Minimum dual-core, quad-core recommended
- Operating System:
 - Windows 2003 (SP2, R2 SP2) 32-bit Enterprise Edition or Server
 - Windows 2008 (SP1, SP2) 64-bit x64 Standard or Enterprise Edition

Requirements

- Using a remote desktop application for the installation is not supported. The recommended process is to install the software on the server console as a local user belonging to the local administrators group.
- The computer name of the installation machine must not contain a hyphen (-) or underscore (_). SRM Report Optimizer will not run properly on machines with a computer name that contains either of these characters.

- The directory path that contains the installation files (if copied from the DVD) must not contain spaces. Directory names must include only alphanumeric characters.
- The installation path may not contain embedded spaces, non-English characters, or punctuation. The path is limited to basic ASCII alphanumeric characters.
- Installations using Virtual Network Computing (VNC) software are not supported. The installation bits must be local to the server where you plan to install the product.
- Java Plug-in 1.5.0 or later - The plug-in can be downloaded from the following web site:
<http://www.java.com/download/>
- MS .NET Framework 2.0 and MS .NET Framework 2.0 SP1. The MS .NET Framework files can be downloaded from the following web site:
<http://www.microsoft.com/Downloads/>
- The following services must be started:

Windows 2003

- EventLog
- NT LM Security Support Provider
- Remote Procedure Call (RPC)
- TCP/IP

Windows 2008

- Windows Event Log
- Remote Procedure Call
- TCP/IP

- Internet Information Services (IIS) must not be installed. If it is installed, it must be removed or disabled before starting the installation.
- Data Execution Prevention (DEP) must be disabled. See “[Error message: Service <Server Name> failed to start](#)” on page 77.
- The following ports must be open:

Note: The installer verifies that the necessary ports are open. A warning message displays if any of the ports are not available.

- **MySQL:** 3306
- **TomCat:** 8080, 8005, 8443
- **Other:** 6410, 6420
- The default port for Oracle is 1521.

If you are running Windows 2008, User Account Control (UAC) must be disabled. To disable UAC:

- 1 Click **Start > Control Panel > User Accounts**.
- 2 In the User Accounts window, click **User Accounts**.
- 3 Click **Turn User Account Control on or off**.
- 4 If UAC is currently configured in Admin Approval Mode, the User Account Control message appears. Click **Continue**.
- 5 Clear the “Use User Account Control (UAC) to help protect your computer” check box, and then click **OK**.
- 6 Click **Restart Now**.

Installing the Report Database

The Report Database is a central repository for all of the report data gathered from the management servers running HP Storage Essentials and provided to SRM Report Optimizer.

For additional details about the Report Database, refer to the online help in the Report Database Admin Utility.

The Report Database must be installed on the same server as SRM Report Optimizer, and it must be installed before SRM Report Optimizer. If you are upgrading SRM Report Optimizer, you should install the Report Database before starting the upgrade.

If you are installing HP Storage Essentials on a server with SRM Report Optimizer already installed, you must install HP Storage Essentials prior to installing the Report Database or upgrading SRM Report Optimizer.

To install the Report Database:

- 1 Do one of the following:

- **CD.** Put the Utilities CD in the CD drive of the designated server. Double-click the `InstallReportDatabase.exe` file located in the root directory.
- **Copied locally.** Copy the bits to the server where you are planning to install the product. Use an MD5 Checksum utility to verify that all the bits were copied over. Double-click `InstallReportDatabase.exe`.

Note: If HP Storage Essentials is on the same server and is running, a message displays to inform you that the AppStorManager service will be stopped. Click **OK**.

Note: If you are installing on Windows 2008, the User Account Control window may display. Click **Allow**.

2 The Storage Report Database installation wizard introduction window displays. Click **Next**.

3 Specify the installation location for the Report Database.

Note: Path information can only contain the following characters: A-z, 0-9, hyphen, underscore, period, back slash. The paths cannot contain spaces. Drive letters must be fixed drives.

4 If you are installing SRM Report Optimizer on a different server than HP Storage EssentialsHP Storage Essentials, this window will include an Install Oracle section. If so, specify the location of the installation media for Oracle.

Note: If you copy the Oracle DVD, make sure you copy it to top-level directory where the directory path is not more than 20 characters long.

Click **Install**.

5 If you are installing on a Windows 2008, a note about User Account Control being disabled may display. Click **Next**. The installation status window displays.

6 When the installation is complete, click **Next**.

7 The installation success window displays. Click **Done**.

Configure the Report Database to point to the management server



If you are installing SRM Report Optimizer on the same server as HP Storage Essentials, you do not need to configure the Report Database to point to the management server.

To configure the Report Database to point to the management server:

- 1 Launch **ReportAdmin.bat** from <installation directory>\ReportDatabase on the server where you installed the Report Database. The default directory name is `APPQ`. The utility opens and the “Set up report sources” screen displays.
- 2 Click **Add**.
- 3 Enter a site name in the Site Name box. The site name is used to differentiate the server from other servers.
- 4 Enter the IP address of the management server. The Report Database uses this IP address to contact the management server for report data.
- 5 Click **OK**. The management server is set as the local management server.

Configure a global report database

If desired, you can configure a global report database. Configuring a global report database allows you to use the Global Reports in SRM Report Optimizer. To configure a global report database:

- 1 Add additional management servers on the “Set up report sources” screen.
- 2 By default, the first management server you entered will be configured as the local management server. Data from the local management server is used for the Standard Reports in SRM Report Optimizer. If you want to make one of the other management servers the local server, click **Configure Report Database** in the left pane.
- 3 Select another management server from the Local Report drop-down menu, and click **Submit**.
- 4 Click **Set up report sources** in the left pane. The selected management server becomes the local management server. If you want to view updated reports immediately, click **Refresh Data Now**. Otherwise, updated reports will be available after the next report cache refresh is processed.

Note: For additional details about configuring the Report Database, refer to the Report Database online help.

Performing a fresh installation of SRM Report Optimizer

Keep in mind the following:

- If you had previously installed SRM Report Optimizer, but you are migrating to a single server with both SRM Report Optimizer and HP Storage Essentials, follow the steps in [Upgrading from 6.1. or 6.1.1, or migrating to a single server](#), page 27
- The installation may take an hour or more, depending on your configuration.
- During the installation, Java Runtime Environment (JRE) 1.6 is installed to the installation directory, and the location of the JRE is appended to the PATH environment variable.

To complete a fresh installation of SRM Report Optimizer:

- 1 Do one of the following:
 - **DVD.** Put the SRM Report Optimizer installation DVD into the DVD drive of the designated server. If the DVD does not autorun, double-click `InstallReportOptimizer.exe`.
 - **Copied locally.** Copy the bits to the server where you are planning to install the product. Use an MD5 Checksum utility to verify that all the bits were copied over. Double-click `InstallReportOptimizer.exe`.

The Introduction window displays. Click **Next**.

- 2 The End User License Agreement (EULA) displays. Read the EULA and select **Accept** if you agree to the terms. Click **Next**.
- 3 The Important Notes window displays. Read the message and follow the instructions if necessary. Click **Next**.
- 4 The Choose Install folder window displays. Choose the installation folder, and click **Next**.

Note: The installation directory must not contain spaces. Directory names must include only alphanumeric characters.

- 5 If you have insufficient disk space, a warning message displays. Click **OK** if you want to continue with the installation (not recommended). Otherwise, click **Cancel**, free up disk space, and restart the installation.
- 6 The Pre-Installation Summary window displays. Click **Install**. The installation begins.

When the installation is complete, the following message is displayed:

Congratulations! HP Report Optimizer has been successfully installed to:
<Installation Directory>
- 7 If HP Storage Essentials is installed on this server, a message displays to inform you that you need to restart the system. Select **Yes, restart my system**.
- 8 Click **Done**.

Note: If the installation fails, see [“Failed installation or uninstallation”](#) on page 74.

Note: If the installation fails due to a problem importing the BIAR file, see [“Manually importing the 6.2 BIAR file”](#) on page 75.
- 9 Complete the configuration instructions described in [“Configuring SRM Report Optimizer”](#) on page 47.
- 10 If desired, complete the optional steps described in [“Tuning the SRM Report Optimizer server”](#) on page 66.

Upgrading SRM Report Optimizer

The upgrade procedure differs depending on whether you are upgrading from version 6.0 or 6.1.

- [Upgrading from 6.0. or 6.0.1](#), page 8
- [Upgrading from 6.1. or 6.1.1, or migrating to a single server](#), page 27

Upgrading from 6.0. or 6.0.1

Keep in mind the following:

- The upgrade process takes several hours to complete.
- Before upgrading, move any existing custom reports out of the Report Pack folder.
- Historical information is not available after upgrading from 6.0 or 6.0.1 to 6.2.
- If you have a user named ReportUser, you must rename it before upgrading. If you have a user group named SE Reports, you must rename it before upgrading.
- During the installation, Java Runtime Environment (JRE) 1.6 is installed to the installation directory, and the location of the JRE is appended to the PATH environment variable.

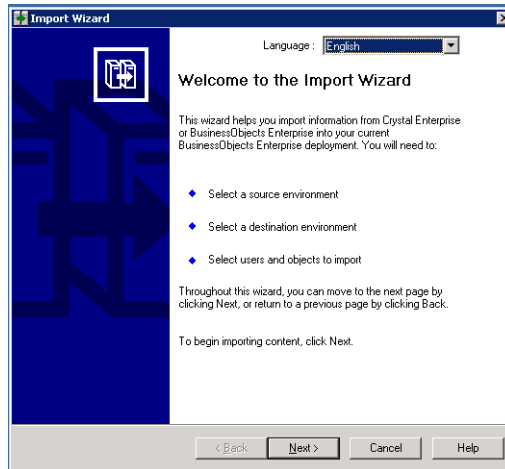
This section contains the following topics:

- [Export your SRM Report Optimizer BIAR file](#), page 10
- [Uninstall SRM Report Optimizer 6.0](#), page 17
- [Install SRM Report Optimizer 6.2](#), page 17
- [Import the exported SRM Report Optimizer 6.0 BIAR file](#), page 19

Export your SRM Report Optimizer BIAR file

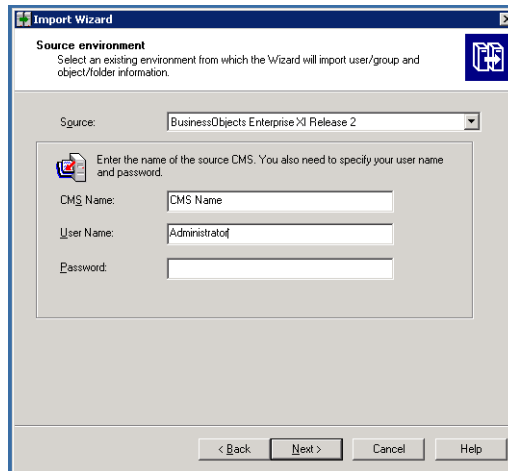
Exporting your BIAR file allows you to transfer your customizations (such as users, folders, and events) to version 6.2. To export your BIAR file:

- 1 On the SRM Report Optimizer server, select **Start Menu > All Programs > BusinessObjects XI Release 2 > BusinessObjects Enterprise > Import Wizard**. The Welcome to the Import Wizard window displays:



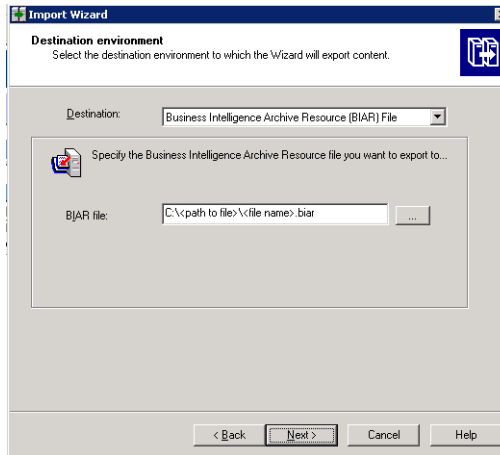
- 2 Click **Next**.

3 The Source Environment window displays:



Select **BusinessObjects Enterprise XI Release 2** in the Source drop-down menu. Ensure that the SRM Report Optimizer host name is entered in the CMS Name box. Enter the SRM Report Optimizer user name and password. The user name must be Administrator and the default password is <blank>. If you changed the Administrator password, use the new password that you assigned. Click **Next**.

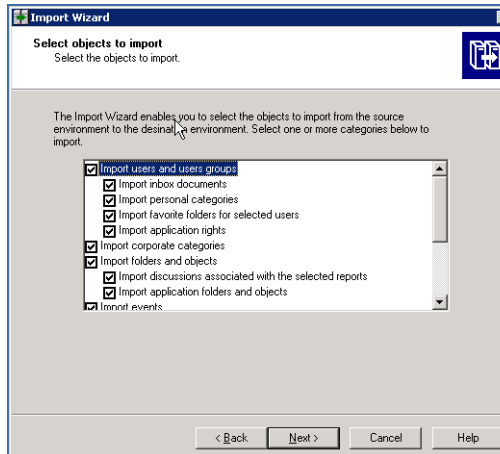
4 The Destination Environment window displays:



Select **Business Intelligence Archive Resource (BIAR) File** from the Destination drop-down menu. Click the ... button, browse to the directory where you would like to save the file, and specify a file name. Click **Open**. Click **Next**.

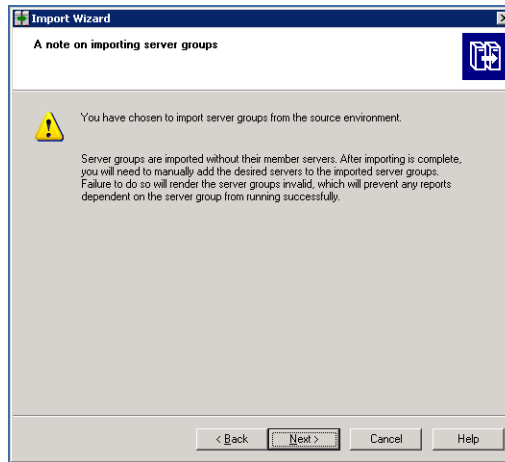
Note: Write down the name and location of the file. You will need to access it later in the process.

5 The Select Objects to Import window displays:



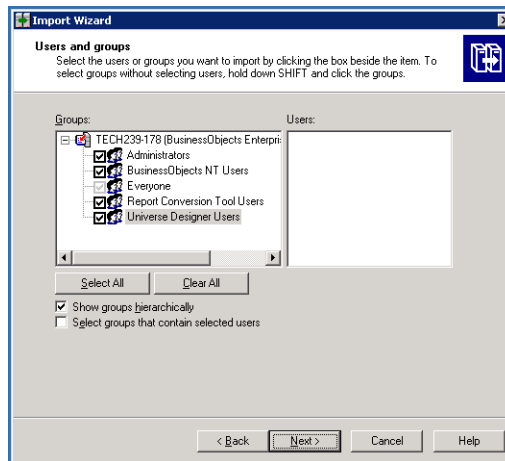
Select all of the check boxes, and click **Next**:

6 A note about importing server groups displays:



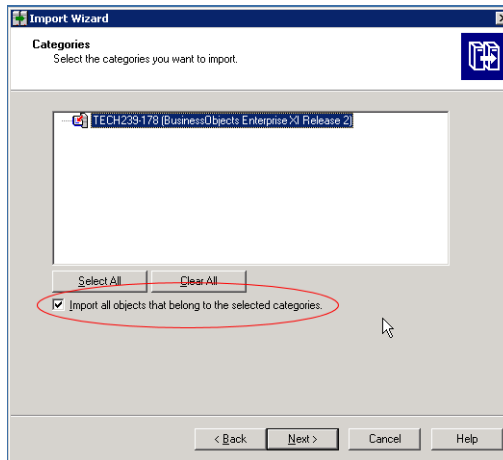
Click **Next**.

7 The Users and Groups window displays:



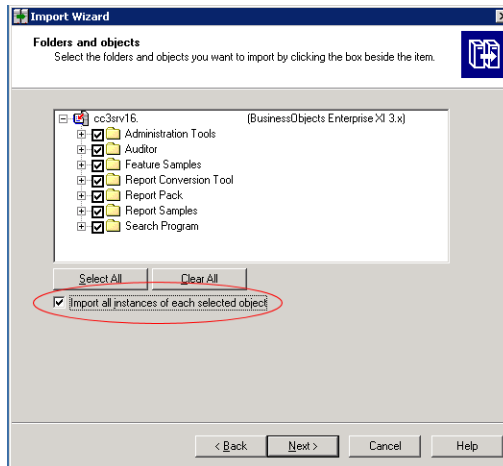
Select all of the users and groups. Click **Next**.

8 The Categories window displays:



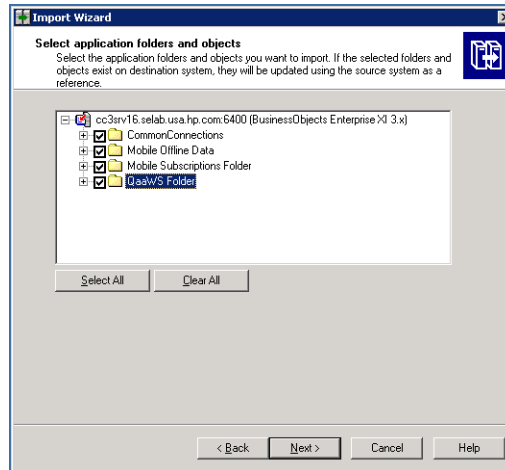
Click the “Import all objects that belong to the selected categories” checkbox. Click **Next**.

9 The Folders and Objects window displays:



Select all of the checkboxes. Click the “Import all instances of each selected report and object packages” checkbox. Click **Next**.

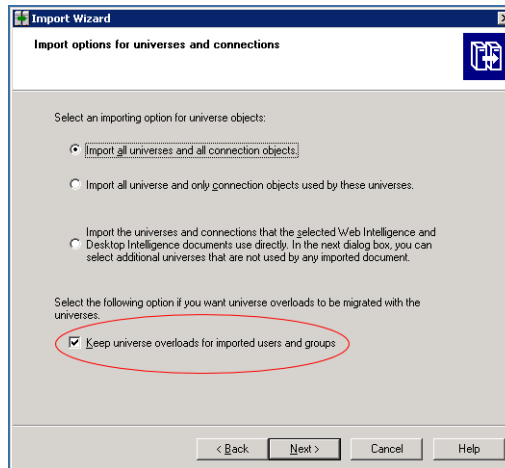
10 The Select Application Folders and Objects window displays:



Select all of the folders. Click **Next**.

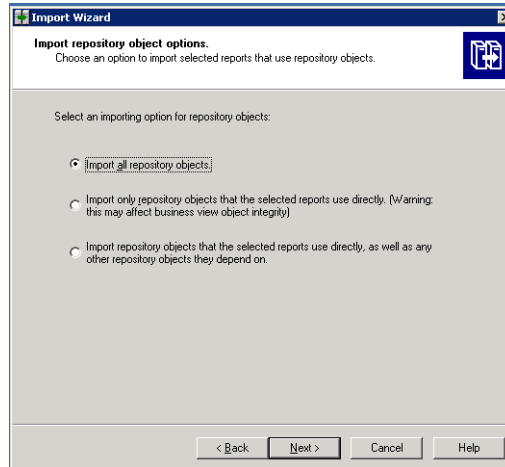
Note: Your list of folders will differ from those in the screenshot. The list is based on folders that you have created.

11 The Import Options for Universes and Connections window displays



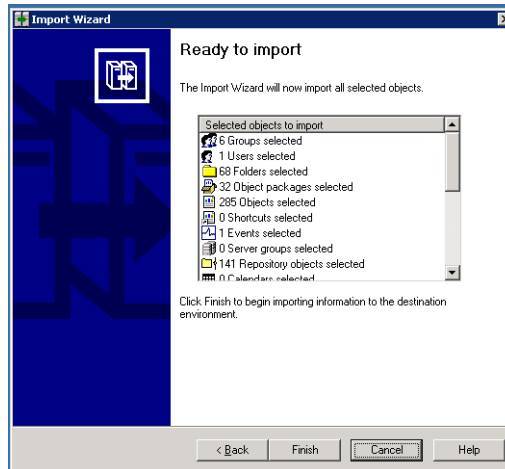
Select the “Import all universes and all connection objects” radio button. Select the “Keep universe overloads for imported users and groups” checkbox. Click **Next**.

12 The Import Repository Object Options window displays:



Select the “Import all repository objects” radio button. Click **Next**.

13 The Ready to Import window displays:



Click **Finish**.

14 The Import Progress window displays. When it completes, click **Done**. The Report Pack folder and universe are exported to a BIAR file.

15 Copy the exported BIAR file to a different computer or a network drive.

Uninstall SRM Report Optimizer 6.0

To uninstall SRM Report Optimizer 6.0:

- 1 Click **Start > Control Panel > Add or Remove Programs**.
- 2 Select HP SRM Report Optimizer, and click **Remove**.
Note: The uninstallation process may take over an hour to complete.
- 3 Click **Uninstall**.
- 4 Click **Done**.
- 5 At the end of the process, the Delete Business Objects Registry Keys windows displays. Click **Yes**. Click **Next**.
Note: It is not necessary to remove BusinessObjects Enterprise XI Release 2 or BusinessObjects Enterprise XI R2 Service Pack 3. These programs are removed when SRM Report Optimizer is removed. The entries for these programs will remain in Add or Remove Programs until you close the panel and reopen it. You can also verify that they have been removed by pressing F5 to refresh the panel.
- 6 Delete the SRM Report Optimizer 6.0 installation directory.
- 7 Recommended: Reboot the system.
- 8 Copy the exported BIAR file back to the SRM Report Optimizer server.

Install SRM Report Optimizer 6.2

Ensure that all of the requirements have been met. See “[Requirements](#)” on page 2.

Note: The installation may take an hour or more, depending on your configuration.

To install SRM Report Optimizer 6.2:

- 1 Do one of the following:
 - **DVD.** Put the SRM Report Optimizer installation DVD into the DVD drive of the designated server. If the DVD does not autorun, double-click `InstallReportOptimizer.exe`.

- **Copied locally.** Copy the bits to the server where you are planning to install the product. Use an MD5 Checksum utility to verify that all the bits were copied over. Double-click `InstallReportOptimizer.exe`.

The Introduction window displays. Click **Next**.

- 2 The Important Notes window displays. Read the message and follow the instructions if necessary.

Important: Ensure that the services you started during the requirements phase are still running. They may have stopped when the system was rebooted.

Click **Next**.

- 3 The Choose Install folder window displays. Choose the installation folder, and click **Next**.
- 4 If you have insufficient disk space, a warning message displays. Click **OK** if you want to continue with the installation (not recommended). Otherwise, click **Cancel**, free up disk space, and restart the installation.
- 5 The Pre-Installation Summary window displays. Click **Install**. The installation begins.

When the installation is complete, the following message is displayed:

```
Congratulations! HP Report Optimizer has been successfully
installed to:
<Installation Directory>
```

- 6 Click **Done**.

Note: If the installation fails, see “[Failed installation or uninstallation](#)” on page 74.

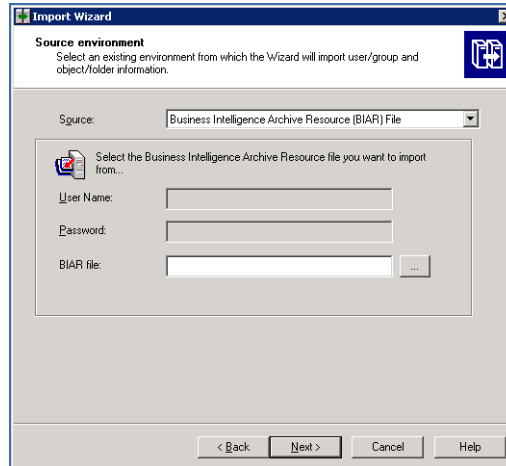
Note: If the installation fails due to a problem importing the BIAR file, see “[Manually importing the 6.2 BIAR file](#)” on page 75.

Note: If you upgrading from an expired evaluation license, you must manually import the 6.2 BIAR file. See “[Manually importing the 6.2 BIAR file](#)” on page 75.

Import the exported SRM Report Optimizer 6.0 BIAR file

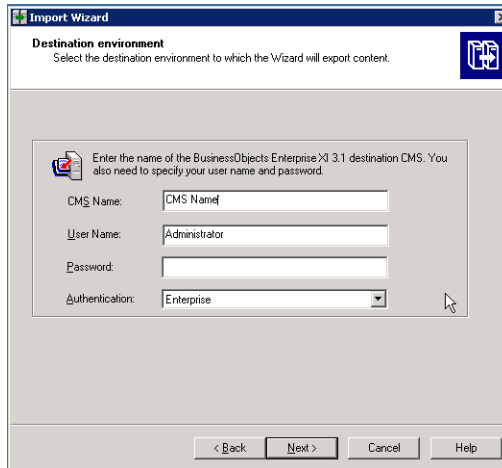
To import the exported 6.0 BIAR file:

- 1 On the SRM Report Optimizer server, select **Start Menu > Programs > BusinessObjects XI Release 3.1 > BusinessObjects Enterprise > Import Wizard**. The Welcome to the Import Wizard window displays. Click **Next**.
- 2 The Source Environment window displays:



Select **Business Intelligence Archive Resource (BIAR) File** from the Source drop-down menu. Click the ... button, browse to the directory where you saved the exported 6.0 BIAR file, and select the file. Click **Open**. Click **Next**.

3 The Destination Environment window displays:



The screenshot shows a window titled "Import Wizard" with a sub-header "Destination environment". Below the sub-header is the instruction: "Select the destination environment to which the Wizard will export content." The main area contains a form with the following fields:

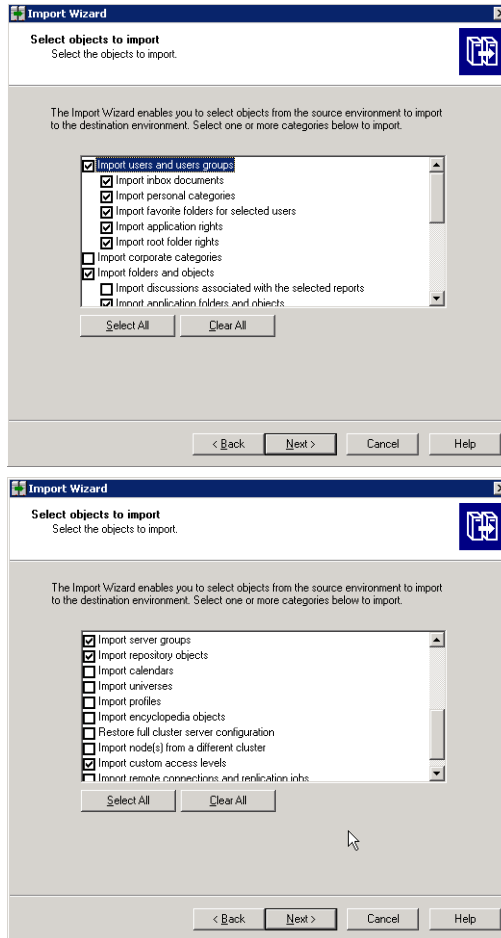
- CMS Name:** A text box containing "CMS Name".
- User Name:** A text box containing "Administrator".
- Password:** A text box that is currently empty.
- Authentication:** A dropdown menu with "Enterprise" selected.

At the bottom of the window are four buttons: "< Back", "Next >", "Cancel", and "Help".

Ensure that the name of your SRM Report Optimizer server is entered in the CMS Name box. Enter the SRM Report Optimizer user name and password. The user name must be Administrator and the default password is <blank>. If you changed the Administrator password, use the new password that you assigned. Click **Next**.

Note: It may take several minutes for the next window to display.

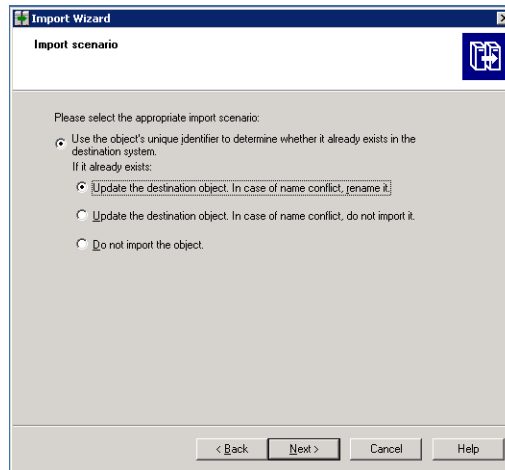
- 4 The Select Objects to Import window displays. Select the following checkboxes:



Note: If you have not created users, do not select the “Import users and user groups” or “Import server groups” boxes. If you have not modified existing user’s security privileges, do not select the “Import custom access levels” box.

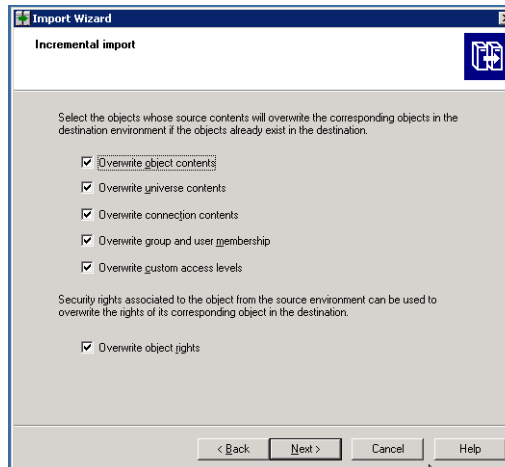
Click **Next**.

5 The Import Scenario window displays:



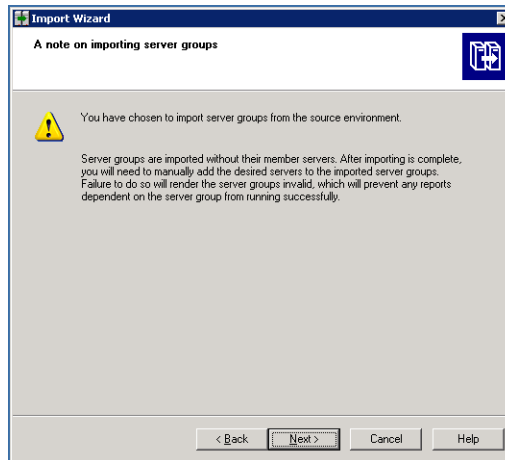
Leave the default options selected. Click **Next**.

6 The Incremental Import window displays:



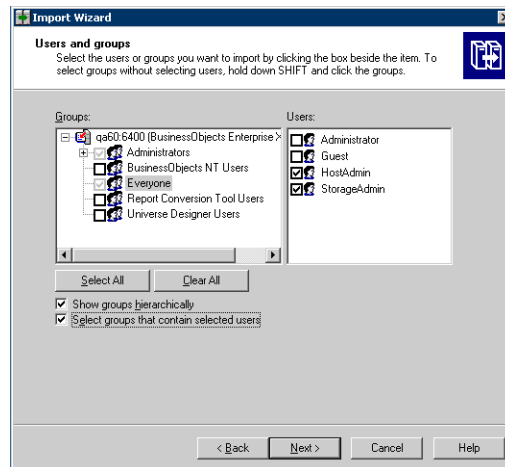
Ensure that all of the checkboxes are selected. Click **Next**.

7 A note about importing server groups may display:



Click **Next**.

8 If you are importing users, the Users and groups window displays.

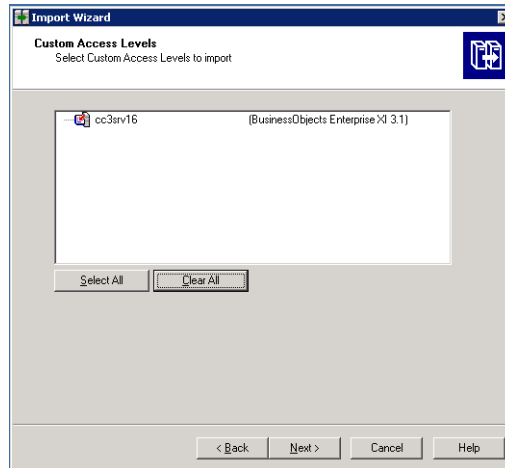


Click the "Select groups that contain selected users" check box. Select the users that you want to import.

Note: Do not select the Administrator or Guest users.

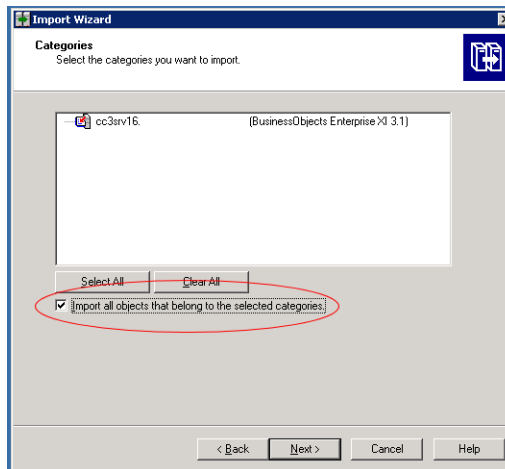
Click **Next**.

9 The Custom Access Levels window may display.



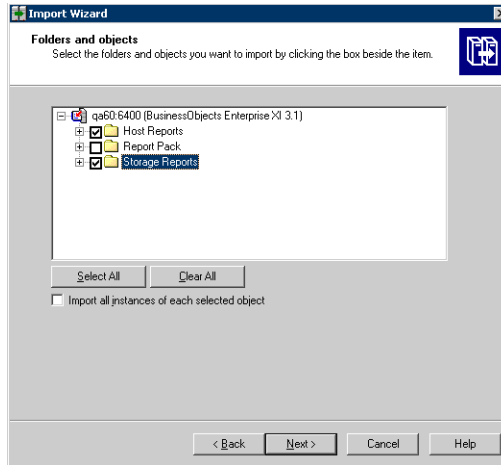
Select all of the check boxes. Click **Next**.

10 The Categories window displays:



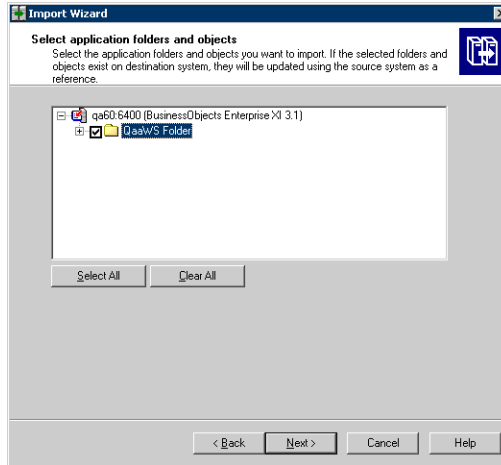
Click the “Import all objects that belong to the selected categories” checkbox. Click **Next**.

11 The Folders and Objects window displays:



Select only the folders that contain custom reports. Do not select the Report Pack folder.

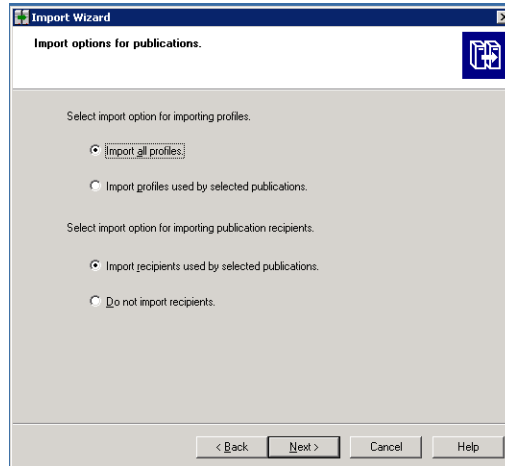
12 The Select Application Folders and Objects window displays:



Select all of the folders. Click **Next**.

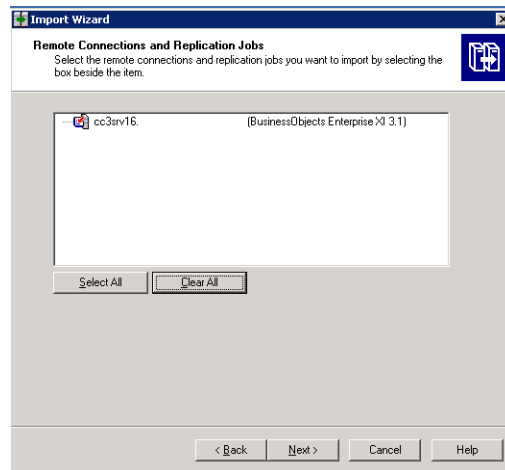
Note: Your list of folders may differ from those in the screenshot. The list is based on folders that you have created.

13 The Import Options for Publications window displays



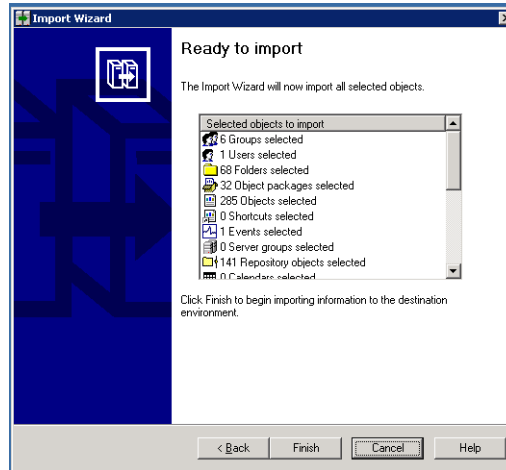
Leave the default selections. Click **Next**.

14 The Remote Connections and Replication Jobs window displays.



Click **Next**.

- 15 The Ready to Import window displays:



Click **Finish**.

- 16 The Import Progress window displays. When it completes, click **Done**. The Report Pack folder and universe are exported to a BIAR file.
- 17 Run any custom reports that you created, and verify that they are still working correctly.
- 18 Complete the configuration instructions described in “[Configuring SRM Report Optimizer](#)” on page 47.
- 19 If desired, complete the optional steps described in “[Tuning the SRM Report Optimizer server](#)” on page 66.

Upgrading from 6.1. or 6.1.1, or migrating to a single server

Use the instructions in this section to upgrade from SRM Report Optimizer 6.1 or 6.1.1, or to migrate from a dual server configuration to a single server configuration.

Keep in mind the following:

- The process takes several hours to complete.

- If you are installing HP Storage Essentials on a server with SRM Report Optimizer already installed, you must install HP Storage Essentials prior to installing the Report Database or upgrading SRM Report Optimizer.
- If you are migrating to a single server, ensure that the computer name of the installation machine does not contain a hyphen (-) or underscore (_). SRM Report Optimizer will not run properly on machines with a computer name that contains either of these characters.
- Before upgrading, move any existing custom reports out of the Report Pack folder.
- If you have a user named ReportUser, you must rename it before upgrading. If you have a user group named SE Reports, you must rename it before upgrading.
- During the installation, Java Runtime Environment (JRE) 1.6 is installed to the installation directory, and the location of the JRE is appended to the PATH environment variable.
- After upgrading from SRM Report Optimizer 6.1 to SRM Report Optimizer 6.2, the installation path will still refer to version 6.1.
- If you are migrating from a dual server configuration to a single server configuration, and you are moving from Windows 2003 to Windows 2008, you will need to re-establish database connections and universe availability for users with custom access levels.
- If you deleted an expired license key, you must add a new license key before upgrading. A license key is located in the `License.txt` file located in the root directory of the installation DVD.
- After upgrading or migrating, the Administrator user password will be the default password (blank).

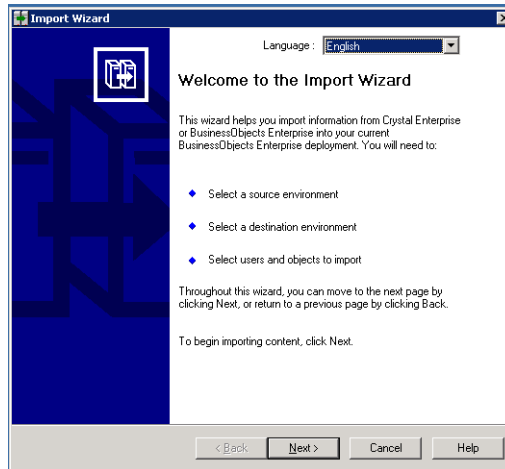
This section contains the following topics:

- [Export your SRM Report Optimizer BIAR file](#), page 29
- [Install SRM Report Optimizer 6.2](#), page 36
- [Import the exported SRM Report Optimizer BIAR file](#), page 38

Export your SRM Report Optimizer BIAR file

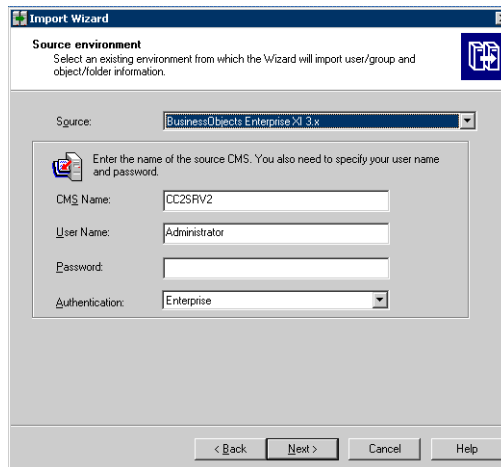
Exporting your BIAR file allow you to transfer your customizations (such as users, folders, and events) to version 6.2. To export your BIAR file:

- 1 On the SRM Report Optimizer server, select **Start Menu > All Programs > BusinessObjects XI Release 3.1 > BusinessObjects Enterprise > Import Wizard**. The Welcome to the Import Wizard window displays:



Click **Next**.

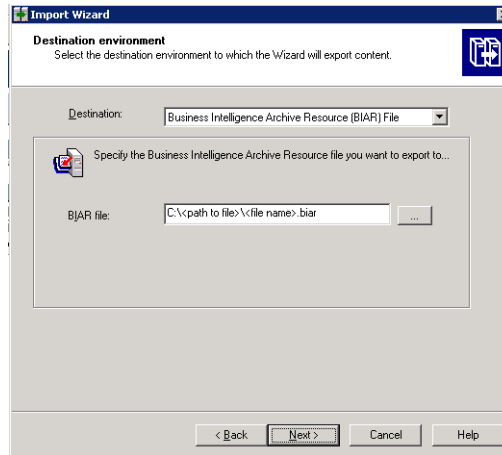
2 The Source Environment window displays:



The screenshot shows a window titled "Import Wizard" with a sub-header "Source environment". Below the sub-header is the instruction: "Select an existing environment from which the Wizard will import user/group and object/folder information." A dropdown menu labeled "Source:" is set to "BusinessObjects Enterprise XI 3.x". Below this is a section with a red document icon and the instruction: "Enter the name of the source CMS. You also need to specify your user name and password." This section contains four input fields: "CMS Name:" with the value "CC2SRV2", "User Name:" with the value "Administrator", "Password:" which is empty, and "Authentication:" with a dropdown menu set to "Enterprise". At the bottom of the window are four buttons: "< Back", "Next >", "Cancel", and "Help".

Select **BusinessObjects Enterprise XI Release 3.1** in the Source drop-down menu. Ensure that the SRM Report Optimizer host name is entered in the CMS Name box. Enter the SRM Report Optimizer user name and password. The user name must be Administrator and the default password is <blank>. If you changed the Administrator password, use the new password that you assigned. Click **Next**.

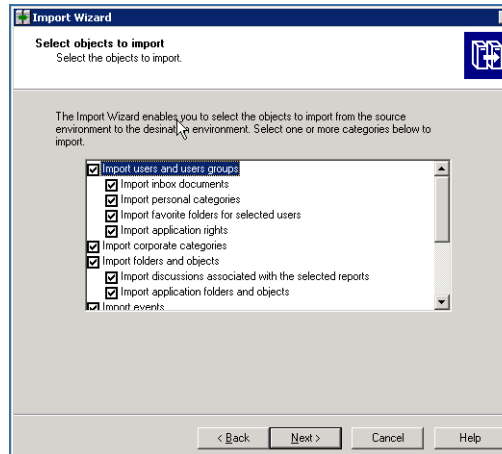
3 The Destination Environment window displays:



Select **Business Intelligence Archive Resource (BIAR) File** from the Destination drop-down menu. Click the ... button, browse to the directory where you would like to save the file, and specify a file name. Click **Open**. Click **Next**.

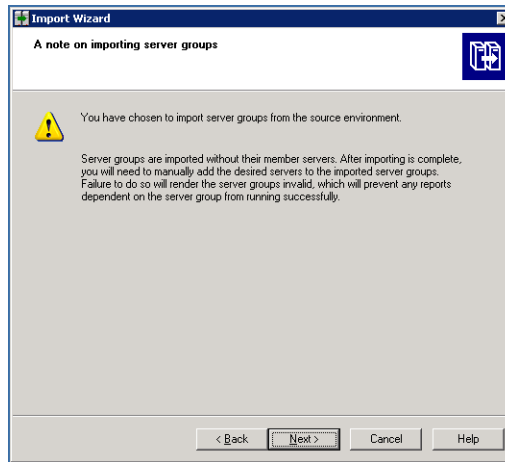
Note: Write down the name and location of the file. You will need to access it later in the process.

4 The Select Objects to Import window displays:



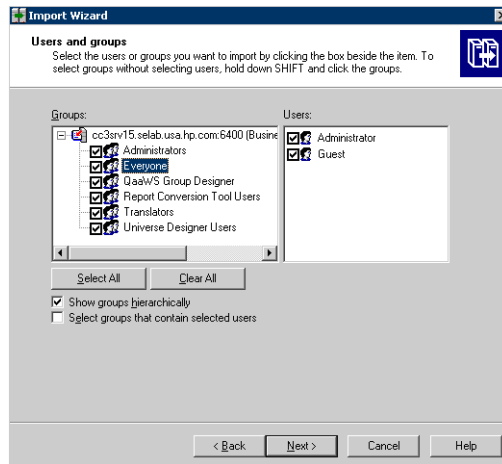
Select all of the check boxes. Click **Next**.

5 A note about importing server groups displays:



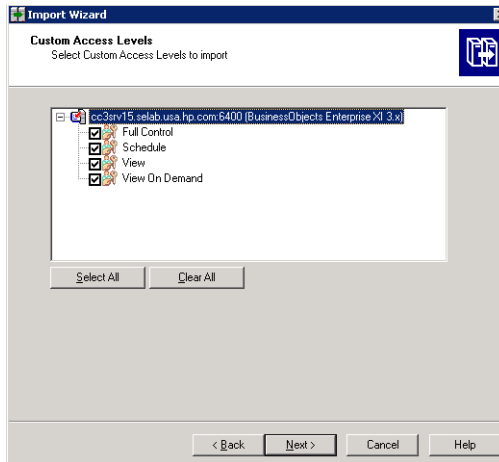
Click **Next**.

6 The Users and Groups window displays:



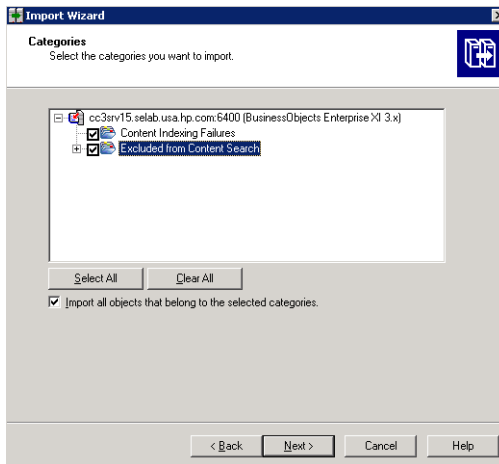
Select all of the groups and users. Click **Next**.

7 The Custom Access Levels window may display.



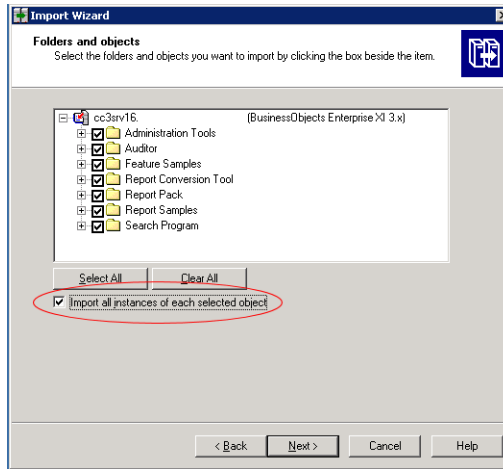
Select all of the check boxes. Click **Next**.

8 The Categories window displays:



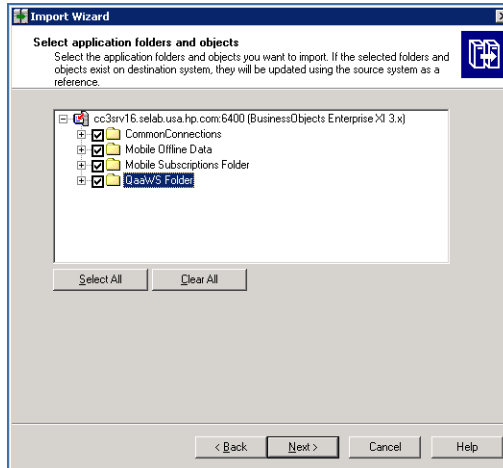
Select all of the check boxes. Click the “Import all objects that belong to the selected categories” checkbox. Click **Next**.

9 The Folders and Objects window displays:



Select all of the checkboxes. Click the “Import all instances of each selected report and object packages” checkbox. Click **Next**.

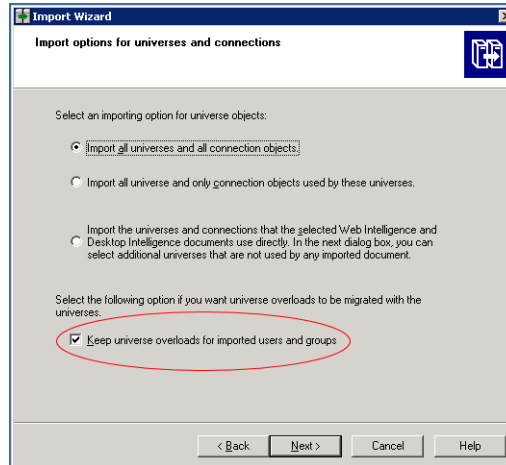
10 The Select Application Folders and Objects window displays:



Select all of the folders. Click **Next**.

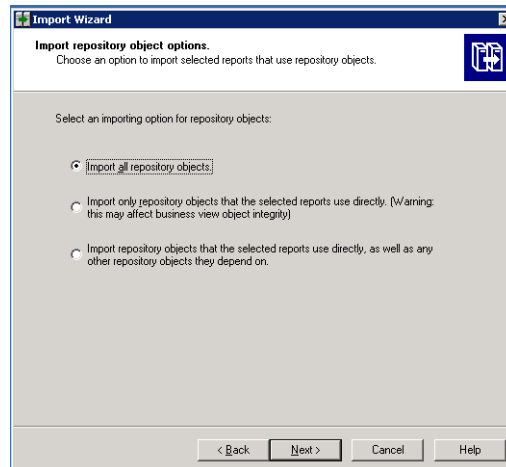
Note: Your list of folders will differ from those in the screenshot. The list is based on folders that you have created.

- 11 The Import Options for Universes and Connections window displays:



Select the “Import all universes and all connection objects” radio button. Select the “Keep universe overloads for imported users and groups” checkbox. Click **Next**.

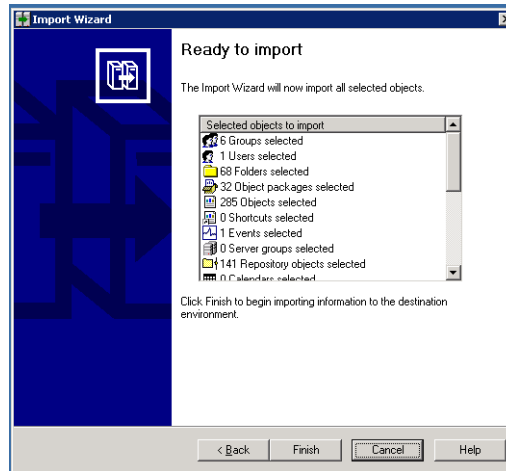
- 12 The Import Repository Object Options window displays:



Select the “Import all repository objects” radio button. Click **Next**.

- 13 The import options for publications window may display. Keep the default options, and click **Next**.

- 14 A note about backing up Server Intelligence objects may display. Click **Next**.
- 15 The Remote Connections and Replication Jobs window may display. Click **Next**.
- 16 The Ready to Import window displays:



Click **Finish**.

- 17 The Import Progress window displays. When it completes, click **Done**. The Report Pack folder and universe are exported to a BIAR file.

Install SRM Report Optimizer 6.2

Ensure that all of the requirements have been met. See “[Requirements](#)” on page 2.

Note: The installation may take an hour or more, depending on your configuration.

To install SRM Report Optimizer 6.2:

- 1 Do one of the following:
 - **DVD.** Put the SRM Report Optimizer installation DVD into the DVD drive of the designated server. If the DVD does not autorun, double-click `InstallReportOptimizer.exe`.

- **Copied locally.** Copy the bits to the server where you are planning to install the product. Use an MD5 Checksum utility to verify that all the bits were copied over. Double-click `InstallReportOptimizer.exe`.

The Introduction window displays. Click **Next**.

- 2 The Important Notes window displays. Read the message and follow the instructions if necessary.

Important: Ensure that the services you started during the requirements phase are still running. They may have stopped when the system was rebooted.

Click **Next**.

- 3 The Choose Install folder window displays. Choose the installation folder, and click **Next**.
- 4 If you have insufficient disk space, a warning message displays. Click **OK** if you want to continue with the installation (not recommended). Otherwise, click **Cancel**, free up disk space, and restart the installation.
- 5 The Pre-Installation Summary window displays. Click **Install**. The installation begins.

If you changed the default password for SRM Report Optimizer, the installer will prompt you to enter the password.

When the installation is complete, the following message is displayed:

```
Congratulations! HP Report Optimizer has been successfully
installed to:
<Installation Directory>
```

- 6 If HP Storage Essentials is installed on this server, a message displays to inform you that you need to restart the system. Select **Yes, restart my system**.
- 7 Click **Done**.

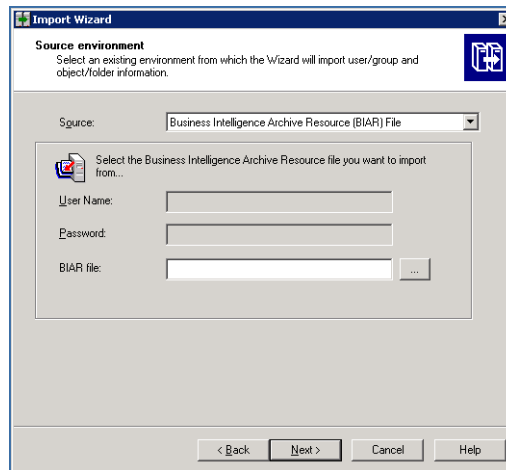
Note: If the installation fails, see [“Failed installation or uninstallation”](#) on page 74.

Note: If the installation fails due to a problem importing the BIAR file, see [“Manually importing the 6.2 BIAR file”](#) on page 75.

Import the exported SRM Report Optimizer BIAR file

If you are migrating from a dual box configuration to a single box, import your exported BIAR file. To import the exported BIAR file:

- 1 On the SRM Report Optimizer server, select **Start Menu > Programs > BusinessObjects XI Release 3.1 > BusinessObjects Enterprise > Import Wizard**. The Welcome to the Import Wizard window displays. Click **Next**.
- 2 The Source Environment window displays:



Select **Business Intelligence Archive Resource (BIAR) File** from the Source drop-down menu. Click the ... button, browse to the directory where you saved the exported BIAR file, and select the file. Click **Open**. Click **Next**.

3 The Destination Environment window displays:

Import Wizard
Destination environment
Select the destination environment to which the Wizard will export content.

Enter the name of the BusinessObjects Enterprise XI 3.1 destination CMS. You also need to specify your user name and password.

CMS Name:

User Name:

Password:

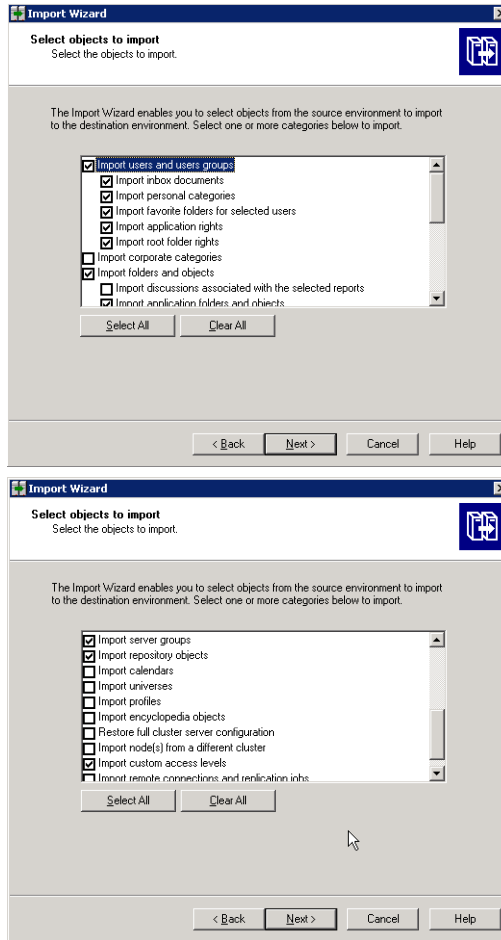
Authentication:

< Back Next > Cancel Help

Ensure that the name of your SRM Report Optimizer server is entered in the CMS Name box. Enter the SRM Report Optimizer user name and password. The user name must be Administrator and the default password is <blank>. If you changed the Administrator password, use the new password that you assigned. Click **Next**.

Note: It may take several minutes for the next window to display.

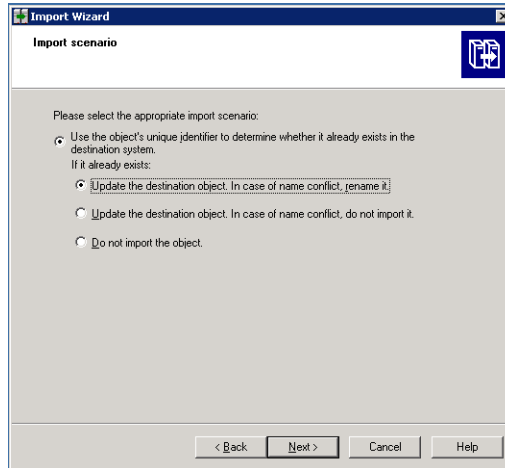
- 4 The Select Objects to Import window displays. Select the following checkboxes:



Note: If you have not created users, do not select the “Import users and user groups” or “Import server groups” boxes. If you have not modified existing user’s security privileges, do not select the “Import custom access levels” box.

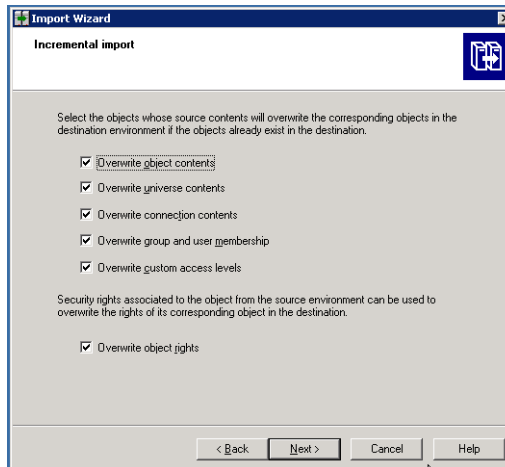
Click **Next**.

5 The Import Scenario window displays:



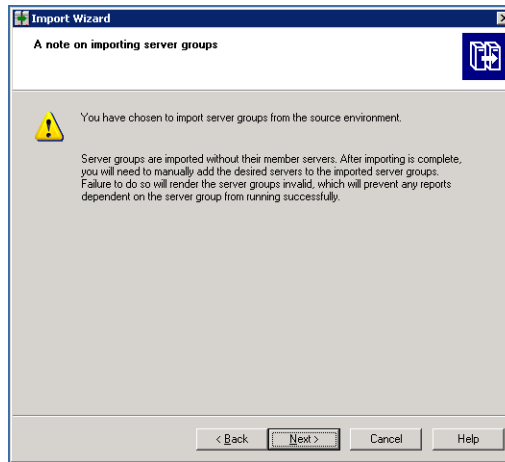
Leave the default options selected. Click **Next**.

6 The Incremental Import window displays:



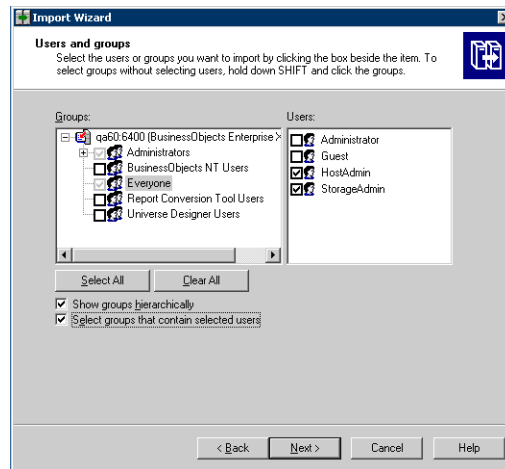
Ensure that all of the checkboxes are selected. Click **Next**.

7 A note about importing server groups may display:



Click **Next**.

8 If you are importing users, the Users and groups window displays.

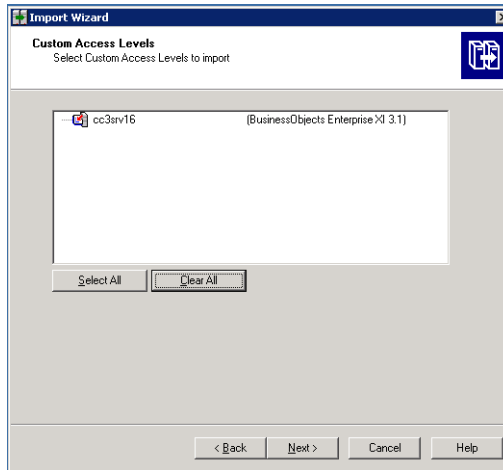


Click the “Select groups that contain selected users” check box. Select the users that you want to import.

Note: Do not select the Administrator or Guest users.

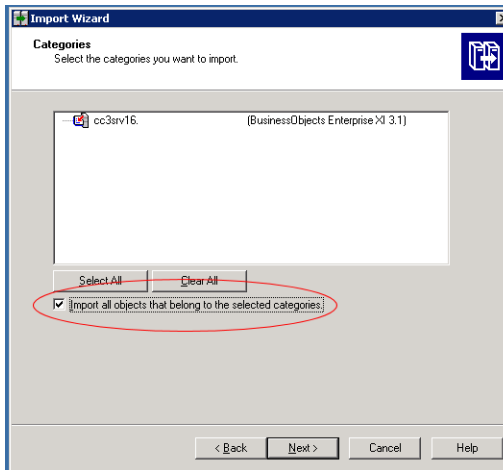
Click **Next**.

9 The Custom Access Levels window may display.



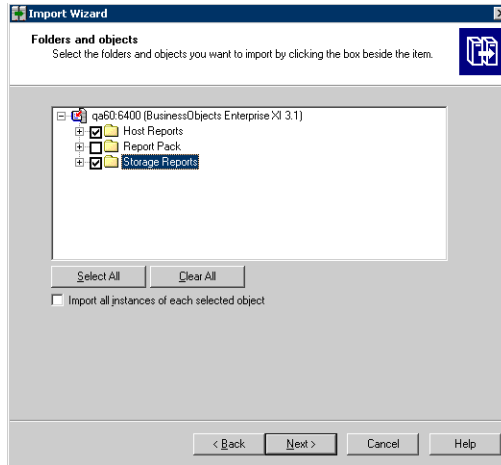
Select all of the check boxes. Click **Next**.

10 The Categories window displays:



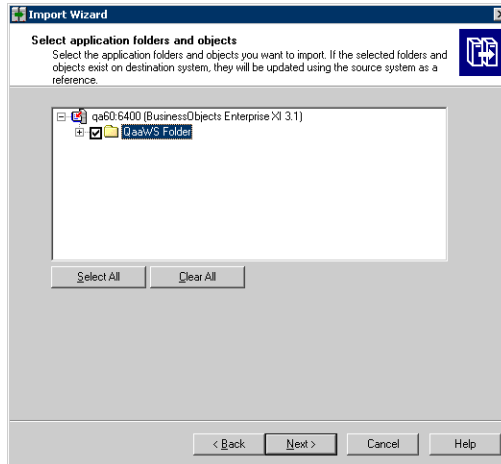
Click the “Import all objects that belong to the selected categories” checkbox. Click **Next**.

11 The Folders and Objects window displays:



Select only the folders that contain custom reports. Do not select the Report Pack folder.

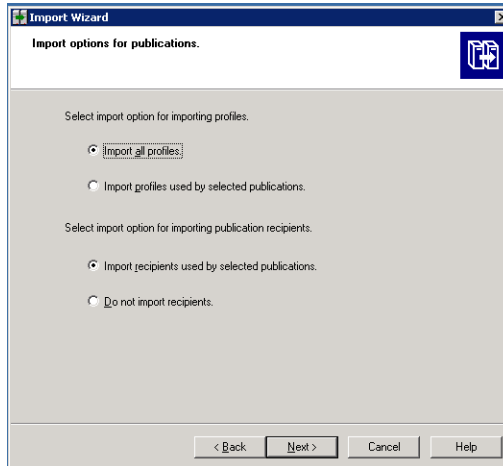
12 The Select Application Folders and Objects window displays:



Select all of the folders. Click **Next**.

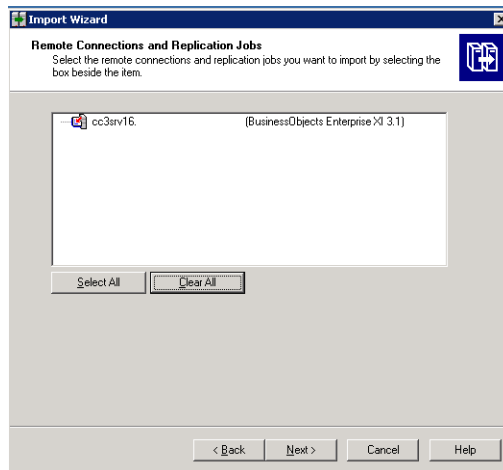
Note: Your list of folders will differ from those in the screenshot. The list is based on folders that you have created.

13 The Import Options for Publications window displays



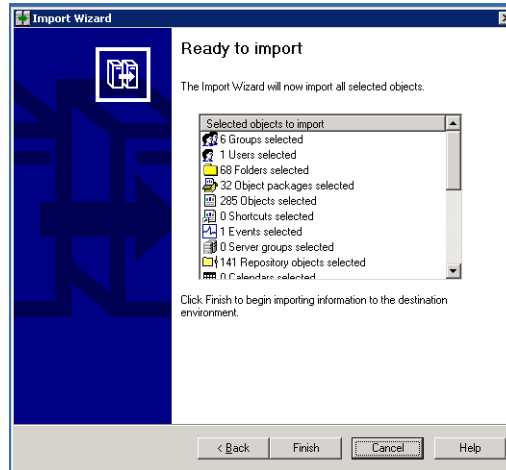
Leave the default selections. Click **Next**.

14 The Remote Connections and Replication Jobs window displays.



Click **Next**.

- 15 The Ready to Import window displays:



Click **Finish**.

- 16 The Import Progress window displays. When it completes, click **Done**.
- 17 Run any custom reports that you created, and verify that they are still working correctly.
- 18 Complete the configuration instructions described in “[Configuring SRM Report Optimizer](#)” on page 47.
- 19 If desired, complete the optional steps described in “[Tuning the SRM Report Optimizer server](#)” on page 66.

Installing the HP Live Network connector (LNC)

Install and configure the HP Live Network connector (LNC) on a server running SRM Report Optimizer as soon as possible so you can receive new and updated report templates that are provided periodically through LNC.

Configure LNC for HP Storage Essentials product streams, and use the LNC command line interface to preview and download content.

See the HP Live Network Installation and Configuration Guide for instructions. The LNC download and its corresponding guide is available on the LNC home page at <https://h20034.www2.hp.com/>.

Uninstalling SRM Report Optimizer 6.2

To uninstall SRM Report Optimizer:

- 1 Click **Start > Control Panel > Add or Remove Programs**.
- 2 Select HP SRM Report Optimizer 6.2 and click **Remove**.
- 3 When the Delete Business Objects Registry Keys window displays, select **Yes**.
- 4 After the uninstall has completed, manually delete the installation directory.
- 5 If the uninstallation fails, follow the steps in “[Failed installation or uninstallation](#)” on page 74.

The uninstallation process generates around 70MB of log files. These files are written to the root directory of the installation folder.

Note: BusinessObjects Enterprise is not removed by the uninstallation.

Uninstalling the Report Database

To uninstall the Report Database:

- 1 Click **Start > Control Panel > Add or Remove Programs**.
- 2 Select Storage Report Database and click **Remove**.
- 3 After the uninstall has completed, manually delete the installation directory (c:\APPQ by default).

Note: Oracle is not removed when the Report Database is uninstalled. You must re-image the box if you want to remove Oracle.

Configuring SRM Report Optimizer

This section contains the following topics:

- [Accessing the Central Management Console, page 48](#)
- [Installing a license key, page 49](#)
- [Changing the password for the Administrator user, page 51](#)
- [Setting the report parameters in HP Storage Essentials, page 51](#)
- [Configuring drill-down options, page 51](#)
- [Disabling browser access to Desktop Intelligence, page 52](#)
- [Adding the Report Designers group, page 53](#)
- [Assigning report designing privileges to report designers, page 54](#)
- [Adding new users to SRM Report Optimizer, page 55](#)
- [Scheduling reports to sync with Report Refresh Cache, page 57](#)
- [Configuring a multi-home environment, page 59](#)
- [Configuring Active Directory \(AD\) Authentication, page 59](#)
- [Scheduling reports based on file based events, page 65](#)
- [Setting up an email server, page 65](#)

Accessing the Central Management Console

To access the Central Management Console:

- 1 Launch the Central Management Console from either of the following locations:
 - Via browser:
`http://<fqdn_or_ip_address_of_Report_Server>:8080/CmcApp/logon.faces`
 - On the SRM Report Optimizer server: **Start Menu > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Central Management Console**
- 2 Log in to the Central Management Console with the following credentials:
 - Username: Administrator
 - Password: (blank)

Installing a license key

The steps for installing a license key differ depending on your configuration.

- [New customers](#), page 49
- [Existing Customers](#), page 49

New customers

Your installation of SRM Report Optimizer includes a read-only license. If you want to create custom reports, you must install a license for creating custom reports:

- 1 Contact your HP representative to procure a license key for creating custom reports.
- 2 Once you have received the license key, launch the Central Management Console as described in [“Accessing the Central Management Console”](#) on page 48.
- 3 In the Manage section, click **License Keys**.
- 4 In the Add Key box, enter your new license key, and click **Add**.

Existing Customers

If you are an existing customer, the license is applied automatically during the upgrade installation.

If you are upgrading from an expired evaluation license, you must restart all of the SRM Report Optimizer servers. To restart the servers:

- 1 Log in to the Central Management Console as described in [“Accessing the Central Management Console”](#) on page 48. If you have not changed the password, use the default credentials:
 - Username: Administrator
 - Password: (blank)
- 2 In the Organize section, click **Servers**.
- 3 Click **Servers List** in the left-hand pane, and then select all of the servers in the right-hand pane.

- 4 Right-click the selected servers, and select **Enable Server** to turn on all of the servers in your system.
- 5 Expand the **Service Categories** node in the left pane.
- 6 Right-click the **Web Intelligence** node, and select **Enable Server**.
- 7 Click the **Core Services** node. Select the AdaptiveJobServer and the AdaptiveProcessingServer. Right-click your selection, and select **Enable Server**.
- 8 Open the Central Configuration Manager (**Start Menu > Programs > BusinessObjects XI Release 3.1 > BusinessObjects Enterprise > Central Configuration Manager**).
- 9 Restart the Server Intelligence Agent service.

Installing a named user permanent license key

Adding a named user permanent license key allows you to log in as Administrator without consuming a concurrent license. To install a named user permanent license key:

- 1 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 2 Log in to the Central Management Console. The default username is Administrator and the default password is <blank>. If you changed the credentials, enter the new credentials for the Administrator account.
- 3 In the Manage section, click **License Keys**.
- 4 Remove any evaluation keys by selecting the key and clicking **Delete**.
- 5 In the Add Key box, enter the named user license key. Click **Add**.
- 6 Return to the Central Management Console home page. In the Organize section, click **Users and Groups**. Select **User List** and then double-click **Administrator**.
- 7 In the Connection Type section, select the **Named User** radio button.
- 8 Click **Save and Close**.

Changing the password for the Administrator user

It is recommended that you change the password for the Administrator user. To change the password:

- 1 Logon to Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 2 In the Organize section, click **Users and Groups**.
- 3 Double-click **Administrator**.
- 4 Enter the new password in the Enterprise Password Settings section.
- 5 Click **Save and Close** for the new password to take effect.

Setting the report parameters in HP Storage Essentials

To set the report parameters in HP Storage Essentials:

- 1 In HP Storage Essentials, select **Configuration > Reports**, and click the **Reporter Configuration** tab.
- 2 In the Host Name or IP box, enter the host name or IP address of the server running SRM Report Optimizer.
- 3 In the Port Number box, enter the port number for accessing SRM Report Optimizer. The default is 8080.
- 4 *Optional:* Change the password for the ReportUser user. You must have already changed the password on the SRM Report Optimizer server.
 - a Click **Change Password**.
 - b Enter the old password (Welcome), enter a new password, and confirm the new password.
 - c Click **Submit**.

Configuring drill-down options

The drill-down options must be properly configured to synchronize graphs with drill-down reports. To configure the drill-down options:

- 1 Log on to InfoView.

- a User a web browser to go to the following URL: `http://<fqdn_or_ip_address_of_Report_Server>:8080/InfoViewApp/logon.jsp`
 - b Log on with a valid username and password.
- 2 In the upper-right corner of your browser, click the **Preferences** button.
 - 3 Click **Web Intelligence** to expand that section.
 - 4 In the Drill Options section, click the **Synchronize drill on report blocks** checkbox.
 - 5 Click **OK**.

Disabling browser access to Desktop Intelligence

Desktop Intelligence is not installed with SRM Report Optimizer, so references to that feature should be removed from the user interface. To remove these references by disabling browser access to Desktop Intelligence:

- 1 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 2 In the Manage section on the home page, click **Applications**.
- 3 Right-click **Desktop Intelligence**, and select **User Security**.
- 4 Click **User Security**, select **Administrators**, and click **Assign Security**.
- 5 Click the **Advanced** tab.
- 6 Click **Add/Remove Rights**.
- 7 Click **General** under the General node.
- 8 Click the **Denied** radio button for every option:
 - Edit this object
 - Log on to Desktop Intelligence and view this object in the CMC
 - Modify the rights users have to this object
 - Securely modify rights users have to objects
- 9 Click **OK**.
- 10 Click **Desktop Intelligence** under the Application node.
- 11 Click the **Denied** radio button for the following options:

- Create Desktop Intelligence Documents
 - Create Templates
 - Save Desktop Intelligence Documents
 - Save Documents for all users
 - Use Templates
- 12 Click **OK**.
 - 13 Click **OK** to apply the chosen settings.
 - 14 Repeat these steps for the Everyone group.

Adding the Report Designers group

Note: SRM Report Optimizer does not support Storage Essentials SRM role-based security. The reports visible to a user are determined by the access and security levels set in SRM Report Optimizer.

Add the Report Designers group to allow easy addition and modification of rights for users who will have report creation, modification, and deletion rights. To add the Report Designers group:

- 1 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 2 Click **Users and Groups** in the Organize section.
- 3 Right-click **Group List**, and select **New Group**.
- 4 Enter Report Designers in the Group Name box.
- 5 Add the following text to the description:

Report Designers group. Users added to this group will have the rights and privileges to create, modify, and delete new and existing reports.'
- 6 Click **OK**.

Assigning report designing privileges to report designers

The Report Designers group needs to be assigned the appropriate application rights. To assign the appropriate rights:

- 1 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 2 In the Manage section, click **Applications**.
- 3 Right-click **Web Intelligence**, and select Properties.
- 4 Click **User Security** in the left panel, and click **Add Principals**.
- 5 Select **Report Designers** and click > to add it to the Selected users/groups list.
- 6 Click **Add and Assign Security**. The Assign Security window displays.
- 7 Select **Full Control** and click > to add it to the Assigned Access Levels pane. Click **OK**.
- 8 Return to the Central Management Console Home page.
- 9 In the Organize section, click **Folders**.
- 10 Right-click **All Folders**, and select **Properties**.
- 11 Click **User Security**, and then click **Add Principals**.
- 12 Select **Report Designers** and click > to add it to the Selected users/groups list.
- 13 Click **Add and Assign Security**. The Assign Security window displays.
- 14 Select **Full Control** and click > to add it to the Assigned Access Levels pane. Click **OK**.
- 15 Return to the Central Management Console Home page.
- 16 In the Organize section, click **Folders**.
- 17 Expand the All Folders node, right-click **Report Pack**, and select **User Security**.
- 18 Click **Add Principals**, and then select **Report Designers** and click > to add it to the Selected users/groups list.
- 19 Click **Add and Assign Security**. The Assign Security window displays.

- 20 Select **Full Control** and click > to add it to the Assigned Access Levels pane. Click **OK**.
- 21 Return to the Central Management Console Home page.
- 22 In the Organize section, click **Universes**.
- 23 In the right-hand pane, right-click **Report Connector**, and select **User Security**.
- 24 Click **Add Principals**, and then select **Report Designers** and click > to add it to the Selected users/groups list.
- 25 Click **Add and Assign Security**. The Assign Security window displays.
- 26 Select **Full Control** and click > to add it to the Assigned Access Levels pane. Click **OK**.
- 27 Return to the Central Management Console Home page.
- 28 In the Organize section, click **Connections**.
- 29 Right-click **DB Connection**, and select **User Security**.
- 30 Click **Add Principals**, and then select **Report Designers** and click > to add it to the Selected users/groups list.
- 31 Click **Add and Assign Security**. The Assign Security window displays.
- 32 Select **Full Control** and click > to add it to the Assigned Access Levels pane. Click **OK**.

Best practices

Always use the Report Designers group to add new users who can add, modify, and delete reports and perform report related management operations. This will simplify maintenance when privileges and rights need to be modified for all users who have report modification and maintenance related tasks.

Adding new users to SRM Report Optimizer

To add new users:

- 1 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.

- 2 Click **Users and Groups** in the Organize section, and click User List in the left-hand pane. All of the valid users are listed in the right-hand pane.
- 3 Click **Manage**, and select **New > New User**.
- 4 Choose the Authentication type and enter user details. If you select LDAP/Windows or AD/Windows NT, enter the username qualified with the appropriate domain. For example `americas\username`.
- 5 Select **Concurrent User** or **Named User** for the Connection type at the bottom of the page.
- 6 Click **Create** or **Create and Close**.
- 7 Right-click the new user, and select **Member of**.
- 8 Click **Join Group**.
- 9 Select the Report Designers group and click > to add it to the Destination Group(s) list. Remove the Everyone group from the Destination Group(s) list if it is included there.
- 10 Click **OK**.
- 11 The new user can now log in to the web interface at the following address:
`http://<fqdn_or_ip_address_of_Report_Server>:8080/InfoViewApp/logon.jsp`

Note: If you changed the port number during installation, enter the selected port number instead of 8080.

For more information, see the “Managing Enterprise and general accounts” section of the “Managing Users and Groups” chapter of the administrator’s guide.

Best Practices

Assign rights to groups instead of individual users.

All users who need rights for the creation, modification, or deletion of reports should be added to the Report Designers group.

All users who need view-only rights should be added to the Everyone group. The Everyone group has view-only rights by default.

Scheduling reports to sync with Report Refresh Cache

The following three sections describe how to schedule reports to sync with Report Refresh Cache.

Changing the Server Intelligence Agent's user account (for monitoring remotely located files)

To change the Server Intelligence Agent's user account:

- 1 Use the Central Configuration Manager to stop the Server Intelligence Agent.
- 2 Right-click the Server Intelligence Agent, and select **Properties**.
- 3 Uncheck the System Account check box.
- 4 Enter the Windows user name and password:

Note: SRM Report Optimizer and the management server are installed on different machines. Both machines must be in the same domain.

- a Click the button to the right of the User field. The Browse User window displays.
 - b Click the **Change** button, and select the domain name.
 - c Click **OK** to return to the Browse User window.
 - d Select the appropriate user, and click **OK** to return to the Server Intelligence Agent window.
- 5 Click **Apply**, and then click **OK**.
 - 6 Start the Server Intelligence Agent. The server process will log on to the local machine with the specified user account. In addition, all reports processed by this server will be formatted using the printer settings associated with the user account that you entered.

Creating a new file-based event

To create a new file-based event.

- 1 On the home page of the Central Management Console, click the **Events** link in the Define section.
- 2 Click **Manage**, and select **New > New Event**.
- 3 From the Type drop-down list, select File.
- 4 Enter “Reporter Event” in the Event Name field.
- 5 Enter a description in the Description field.
- 6 From the Server drop-down list, select the event server that will monitor the specified file.
- 7 Enter a filename in the Filename field.
Note: Enter the absolute path to the file. The drive and directory that you specify must be visible to the Event Server.
- 8 Click **OK**.

Editing a file-based event (to change the server name where the file is located)

To edit a file-based event:

- 1 On the home page of the Central Management Console, click the **Events** link in the Define section.
- 2 Click **Reporter Event**, and select **Manage > Properties**.
- 3 Click General Properties to edit the title and description.
- 4 Click Event Type. In the File Name field, change the server name or IP address to point to where the Report Optimizer file exists. (The folder where the file is created on successful completion of Report Refresh Cache has been shared so that it is accessible to the Report Optimizer Event Server).
- 5 Click **Global Reporter Event**, and select **Manage > Properties**.

- 6 Click **General Properties** to edit the title and description.
- 7 Click **Event Type**. In the **File Name** field, change the server name or IP address to point to where the Report Optimizer file exists. (The folder where the file is created on successful completion of Report Refresh Cache has been shared so that it is accessible to the Report Optimizer Event Server).
- 8 Click **Save** or **Save and Close**.

Configuring a multi-home environment

To configure a multi-home environment:

- 1 Stop the `appstormanager` and `OracleOraHome10TNSListener` services on the Storage Essentials SRM server.
- 2 Add the private IP address to the `listener.ora` file in the `<Oracle Installation Directory>\Ora10\NETWORK\ADMIN` directory on the Storage Essentials SRM server.
- 3 Start the `appstormanager` and `OracleOraHome10TNSListener` services.
- 4 Add the private IP address to the `tnsnames.ora` file in the `<Oracle Installation Directory>\Ora10\NETWORK\ADMIN` directory on the Report Optimizer server.

Note: Use the `tnsnames.ora_template` file as a template instead of directly editing the `tnsnames.ora` file. The `tnsnames.ora_template` file can be found in the root directory of the Report Optimizer DVD.

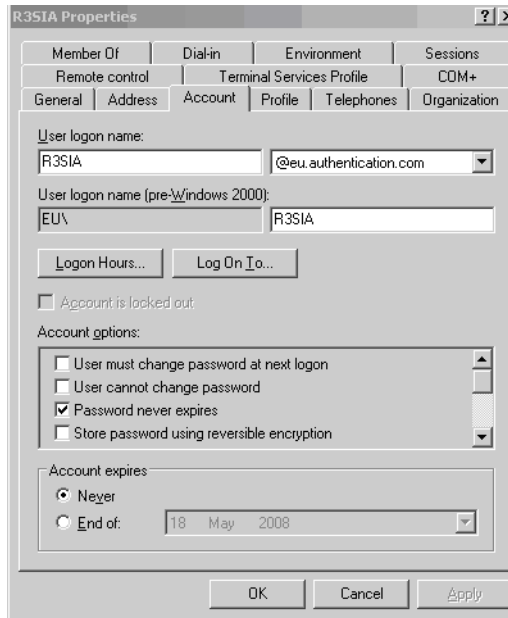
- 5 Use Central Configuration Manager to restart the Server Intelligence Agent.

Configuring Active Directory (AD) Authentication

To configure AD Authentication:

- 1 Create an AD service account to run the Server Intelligence Agent, which runs the management server and all of its services.

- 2 Open the account tab for the user that you created, and click the Password Never Expires check box:



- 3 Using setspn to assign the Service Principal Name for the management server service to this newly created account:

```
Microsoft Windows [Version 5.2.3790]
(C) Copyright 1985-2003 Microsoft Corp.

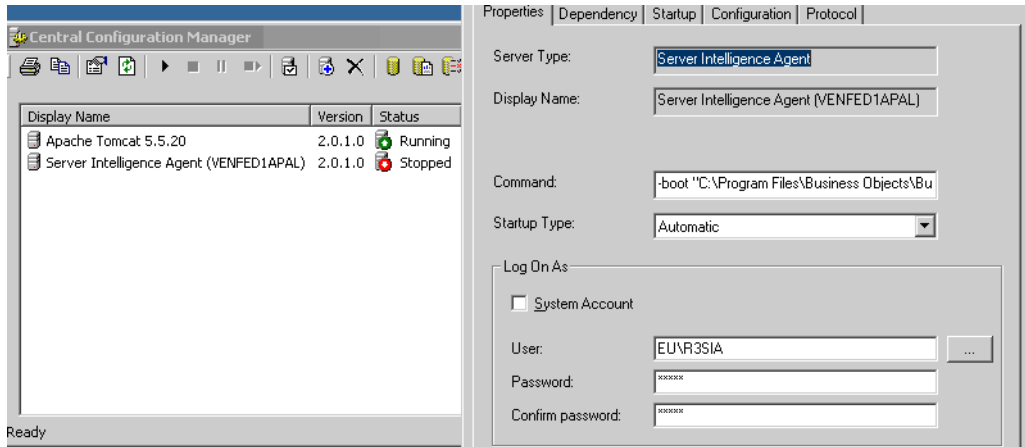
C:\Documents and Settings\Administrator>setspn -a BOBJCentralMS/VEN-FED1-APAL.EU
.AUTHENTICATION.COM R3SIA
Registering ServicePrincipalNames for CN=R3SIA,OU=BO,DC=eu,DC=authentication,DC=
com
      BOBJCentralMS/VEN-FED1-APAL.EU.AUTHENTICATION.COM
Updated object

C:\Documents and Settings\Administrator>
```

where VEN-FED1-APAL is the name of your server,
EU.AUTHENTICATION.COM is the domain, and R3SIA is the user you
created.

- 4 Set the delegation option for the user. On Windows 2000, select the "Account is trusted for delegation" check box on the account tab. On Windows 2003, a delegation tab displays after an SPN has been assigned. Select "Trust this user for delegation (Kerberos only)."
- 5 Set the AD service account to run the Server Intelligence Agent:

- a Open the Central Configuration Manager and stop the Server Intelligence Agent.
- b Once it has stopped, double click the Server Intelligence Agent to see the properties and uncheck the System Account check box. This will enable you to change the account running this service to the account created in step 1.



- c Add the user to the local admin group on the Business Objects server through **My Computer > Manage**.
- 6 Create the WINNT directory and krb5.ini and bscLogin.conf files:
- a Create the directory C:\WINNT.
 - b Create two files in this directory, one named krb5.ini and the other named bscLogin.conf.
 - c In the krb5.ini file, copy and paste the following text:

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

where DOMAIN.COM is the name of your domain and ADSEVER is the name of a domain controller in your environment. All names must include only capital letters.

- d In the `bscLogin.conf` file copy and paste the following text:

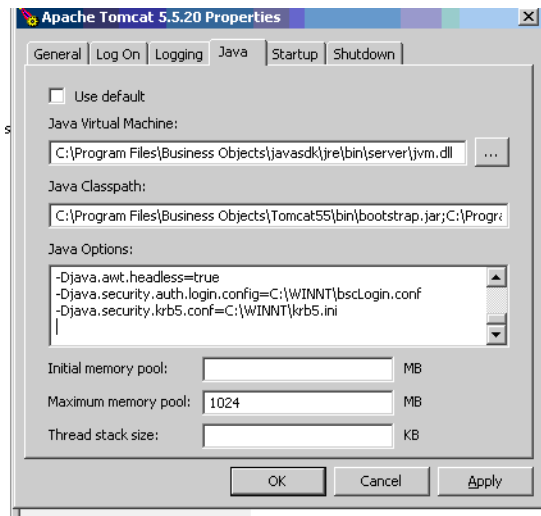
```
com.businessobjects.security.jgss.initiate {  
com.sun.security.auth.module.Krb5LoginModule required;  
};
```

- 7 Set the locations for the files in the Tomcat configuration.

- a Go to **Start > Programs > Tomcat > Tomcat configuration**, and click the **Java** tab.

- b Copy and paste the following lines into the Java Options section:

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



- 8 Configure the AD plugin:

- a On the Central Management Console home page, select **Authentication** from the drop-down menu, and double-click **Windows AD**.

- b In the AD Configuration Summary section, click “” next to AD Administration Name. Enter an AD account which can read the AD. This will be used to bind to the domain and search for the users trying to authenticate. In the Default AD Domain box, enter the Fully Qualified Domain Name (using capital letters), and click **Update**.

Please enter your Active Directory credentials.

AD Administration Credentials

Name: EU\Administrator

Password: ●●●●

Default AD Domain: EU.AUTHENTICATION.COM

Update Cancel

- c In the Authentication Options section, select the “Use Kerberos authentication” radio button and enter the User Principal Name (UPN) of the service account created in step 1. The domain name must be in capital letters.

AD Administration Name: EU\Administrator

Default AD Domain: EU.AUTHENTICATION.COM

Mapped AD Member Groups

Add AD Group (Domain\Group):

Add Delete

Authentication Options

Use NTLM authentication

Use Kerberos authentication

Cache security context (required for SSO to database)

Service principal name: R3SIA@EU.AUTHENTICATION.COM

Enable Single Sign On for selected authentication mode.

- d **Optional:** To import the AD into version 3.0, select “New aliases will be added and new users will be created.”

Propagate Log On to Data Source Credentials
 Enable and update user's Data Source Credentials at logon time

SiteMinder Options

Click on the value to change the options
 SiteMinder Single Sign On: Disabled

New Alias Options

Assign each added AD alias to an account with the same name
 Create a new account for every added AD alias

Update Options

New aliases will be added and new users will be created
 No new aliases will be added and new users will not be created

New User Options

New users are created as named users
 New users are created as concurrent users

Attribute Binding Options

Import Full Name and Email Address
 Give AD attribute binding priority over LDAP attribute binding

Update Reset

- e In the Mapped AD Groups section, enter the name of an AD group in the Add AD Group box.
 - f Click **Add** so the group name is displayed in the box below.
 - g Click **Update** at the bottom of the page. If imported, the group will appear in the box with the full distinguished name from AD. You can now close the Windows AD configuration page.
 - h Verify that the groups and users have been imported by returning to the Central Management Console and clicking **Users and Groups**.
- 9 Modify the `web.xml` file:
- a Open the `web.xml` for Infoview with WordPad or an XML editor such as Notepad ++. The file is located in the following directory:


```
C:\Program Files\Business
Objects\Tomcat55\webapps\InfoViewApp\WEB-INF
```
 - b Search for the following parameter and change the value from FALSE to TRUE:


```
authentication.visible
```
 - c Save the changes and restart Tomcat.

- 10 Test the AD authentication by logging on to InfoView using the AD user name and password of a user who has been mapped to BusinessObjects. The InfoView Home page should display.

Scheduling reports based on file based events

If you had scheduled reports based on file based events, you must reschedule those reports after upgrading. Refer to the “Using file-based events with scheduled reports” section of the quick start guide.

Setting up an email server

To set up an email server:

- 1 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 2 Click **Servers**. This will show a list of all of the server processes running on your SRM Report Optimizer server.
- 3 Double-click **<your_servername>.destinationjobserver**.
- 4 Click **Destination**.
- 5 Select **Email** from the Destination drop-down menu, click **Add**, and populate your smtp server details.
- 6 Click **Save** or **Save and Close**.
- 7 Double-click **<your_servername>.AdaptiveJobServer**.
- 8 Click **Destination**.
- 9 Select **Email** from the Destination drop-down menu, click **Add**, and populate your smtp server details.
- 10 Click **Save** or **Save and Close**.

For more information, see the “Configuring the destination properties for job servers” section of the “Managing and Configuring Servers” chapter of the administrator’s guide.

Best practices

Set up an email account like `StorageReporter@mycompany.com` and use this account for SMTP mailings.

Tuning the SRM Report Optimizer server

The steps described in this section are optional steps for further configuring your server.

This section contains the following topics:

- [Recreating emailed report schedules, page 66](#)
- [Configuring a set of user groups as read-only users, page 66](#)
- [Disabling servers that are not required, page 70](#)
- [Increasing the memory heap size value, page 70](#)
- [Adding a folder for user created custom reports, page 72](#)
- [Deleting duplicate folders, page 73](#)
- [Increasing the time before sessions time out, page 88](#)

Recreating emailed report schedules

If you upgraded from a previous version of the product, you may want to recreate your emailed report schedules. During the upgrade, information about the current emailed report schedules is saved in the `%MGR_DIST\Data` directory in the `EmailJReporterSchedules.txt` file on the HP Storage Essentials server. The information in this file can be used to schedule emailed reports in SRM Report Optimizer. For details about emailing reports, refer to the “Emailing Reports” section of the quick start guide.

Configuring a set of user groups as read-only users

To configure a set of user groups as read-only users:

- 1 Log on to the Central Management Console as an administrative user.

- 2 In the Organize section, click **Users and Groups**.
- 3 Click the Manage drop-down menu, and select **New > New Group**.
- 4 Enter a group name such as Report Viewers in the Group Name box. Enter a description in the Description box. Click **OK**.
- 5 Click the Manage drop-down menu and select **New > New User**.
- 6 Enter an account name in the Account Name box. Enter other details as appropriate. Click **Create**. Repeat this step to create additional users.
- 7 After entering the last user, click **Create and Close**.

Note: To integrate Active Directory users, see [Configuring Active Directory \(AD\) Authentication](#) on page 59.
- 8 Select all of the users that you just created, right-click, and select **Join Group**.
- 9 From the Available Groups section, select the Report Viewers group and click > to move it to the Destination Group(s) section. Click **OK**.
- 10 Return to the Central Management Console Home page.
- 11 In the Define section, click **Access Levels**.
- 12 Click the Manage drop-down menu and select **New > Create Access Level**.
- 13 Enter a title in the Title box and click **OK**.
- 14 Double click the access level you just created, and then click **Included Rights**.
- 15 In the right pane, click **Add/Remove Rights**.
- 16 In the left pane, select **General > General**, and then select the Granted radio button for the following rights:
 - Reschedule instances
 - Reschedule instances that the user owns
 - Schedule document that the user owns to run
 - Schedule document to run
 - Schedule objects that the user owns to destinations
 - Schedule on behalf of other users

- Schedule on behalf of other users that the user owns
 - Schedule to destinations
 - View objects
 - View objects that the user owns
- 17 In the left pane, select **Content > Web Intelligence Report**, and then select the **Granted** radio button for the following rights:
- Download files associated with the object
 - Export the report's data
 - Refresh List of Values
 - Refresh the report's data
 - Save as CSV
 - Save as excel
 - Save as PDF
 - Use Lists of Values
- 18 In the left pane, select **Application > InfoView**, and then select the **Granted** radio button for the following rights:
- View the favorites folder
 - View the Inbox
- 19 In the left pane, select **Application > Web Intelligence**, and then select the **Granted** radio button for the following rights:
- Enable drill mode
 - Enable Java Report Panel
- 20 In the left pane, select **System > Connection**, and then select the **Granted** radio button for the following rights:
- Data Access
 - Use connection for Stored Procedures
- 21 In the left pane, select **System > Universe**, and then select the **Granted** radio button for the following right:
- Data Access
- 22 Click **OK**. Click **Close**.

- 23 Return to the Central Management Console Home page.
- 24 In the Organize section, click **Folders**.
- 25 Click **All Folders**.
- 26 Click the **Manage** drop-down menu and select **Top Level Security > All Folders**.
- 27 Select Everyone, and click **Assign Security**.
- 28 Select View from the Available Access Levels section, and click > to move to the Assigned Access Levels section.
- 29 Click **Apply**. Click **OK**. Click **Close**.
- 30 Expand the All Folder node and select Report Pack. Right-click and select User Security.
- 31 Click **Add Principals**.
- 32 In the Available users/groups section, select Report Viewers and click > to move it to the Selected users/groups section.
- 33 Click **Add and Assign Security**.
- 34 Uncheck the Inherit From Parent Folder and Inherit From Parent Group check boxes.
- 35 In the Available Access Levels section, select Report Viewers Access Level and click > to move it to the Assigned Access Levels section.
- 36 Click **Apply**. Click **OK**. Click **Close**.
- 37 Return to the Central Management Console Home page.
- 38 In the Manage section, select Web Intelligence, right-click, and select User Security.
- 39 Repeat steps 31 to 37.
- 40 In the Organize section, click **Connections**.
- 41 Click the Manage drop-down menu, and select **Top-Level Security > All Connections**.
- 42 Repeat steps 31 to 37.
- 43 In the Organize section, click **Universes**.
- 44 Click the Manage drop-down menu, and select **Top-Level Security > All Universes**.

45 Repeat 31 to 37.

Disabling servers that are not required

The following servers are not required by SRM Report Optimizer and should be stopped and set to the Disabled state:

- Crystal Reports Cache Server
- Crystal Reports Job Server
- Crystal Reports Processing Server
- Desktop Intelligence Cache Server
- Desktop Intelligence Job Server
- Desktop Intelligence Processing Server
- Report Application Server

To disable these servers:

- 1 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 2 In the Organize section, click **Servers**.
- 3 Select the servers, right-click, and select **Disable Server**.

Increasing the memory heap size value

Increasing the memory heap size value will prevent potential error messages. To increase the memory heap size value:

- 1 Click **Start > Run**. The Run dialog box appears.
- 2 Enter `regedit` in the Open text field.
- 3 Click **OK**. The Registry Editor displays.
- 4 Navigate to **HKEY_LOCAL_MACHINE/SYSTEM/CurrentControlSet/Control/Session Manager/Subsystems**.
- 5 Right-click the Windows key and select **Modify**.
- 6 Edit the SharedSection value from `1024,3072,512` to `1024,3072,1024`.

- 7 Navigate to **HKEY_LOCAL_MACHINE\SOFTWARE\Business Objects\Suite 12.0\default\WebIntelligence\Server\Admin\SwapTimeOut**.
- 8 Edit this value to 1500 seconds. Alternatively, set this to a value higher than the Web Intelligence Report Server connection time out value found in the Central Management Console. This value is written in minutes. The default value is 20.
- 9 Close the Registry Editor.
- 10 Restart the Web Intelligence Report Server for the changes to take effect.

Creating a server group

Creating a server group that contains all of the SRM Report Optimizer servers allows you to modify the status of the servers from the Central Management Console. To create a server group:

- 1 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 2 In the Organize section, click **Servers**.
- 3 Right-click **Server Groups**, and select **New > Create Server Group**.
- 4 In the Name box, enter Report Connector Services.
- 5 Click **OK**.
- 6 Click **Servers List**.
- 7 Select the following servers:
 - AdaptiveJobServer
 - AdaptiveProcessingServer
 - CentralManagementServer
 - ConnectionServer
 - DestinationJobServer
 - EventServer
 - InputFileRepository
 - ListOfValuesJobServer

- MultiDimensionalAnalysisServicesServer
 - OutputFileRepository
 - ProgramJobServer
 - PublicationJobServer
 - ReportApplicationServer
 - WebIntelligenceProcessingServer
- 8 Right-click the selected servers, and select **Add to Server Group**.
 - 9 Select the **Report Connector Services** group, and click the > button.
 - 10 Click **OK**.

Adding a folder for user created custom reports

To add a folder for user created custom reports:

- 1 Log on to InfoView.
 - a User a web browser to go to the following URL: `http://<fqdn_or_ip_address_of_Report_Server>:8080/InfoViewApp/logon.jsp`

Note: If you changed the port number during installation, enter the selected port number instead of 8080.
 - b Log on with a valid username and password.
- 2 Right-click **Public Folders**, and select **New > Folder**.
- 3 Enter the following name for the folder: `<Customer Name> <Management Server Name> reports`.

Best practices

Make sure you follow the naming convention described above. If there are multiple installations being configured at the same time, specify the management server name to uniquely identify each installation.

When exporting and importing end-user created reports for backup or support purposes, a unique top-level folder name for the reports will ensure that the reports don't get overwritten. Unique folder names for end-user reports will also ensure that Report Pack updates don't overwrite user-created custom reports.

Deleting duplicate folders

To delete duplicate folders:

- 1 Right-click the folder you want to remove.
- 2 Select **Organize > Delete**.
- 3 Click **OK**.

Troubleshooting

This section contains the following topics:

- [Failed installation or uninstallation, page 74](#)
- [Manually importing the 6.2 BIAR file, page 75](#)
- [Failed license installation, page 76](#)
- [Error message: Service <Server Name> failed to start, page 77](#)
- [Error message: Account Information Not Recognized, page 77](#)
- [Warning message: The object named 'Root Folder' with id number '23' may never be modified or deleted, page 77](#)
- [Servers disabled after license expiration, page 77](#)
- [Resetting the Administrator password, page 78](#)

Failed installation or uninstallation

If the installation or uninstallation fails, you must run the BusinessObjects cleanup scripts before attempting the process again. To run the BusinessObjects cleanup scripts:

- 1 Install the Microsoft Windows Installer Cleanup Utility, which can be downloaded from the following web site:
<http://support.microsoft.com/default.aspx?kbid=290301>
- 2 Install JRE 1.6, which can be downloaded from the following website:
<http://java.sun.com/downloads>
- 3 Set the %JAVA_HOME% environment variable to the JRE installation directory. For example, set the variable to JAVA_HOME=C:\Program Files\Java\jre1.6.0.
- 4 Copy the `bo_cleanup_scripts.zip` file from the SRM Report Optimizer installation directory to another folder. For example, copy the file to `c:\`.
- 5 Extract the `bo_cleanup_scripts.zip` file.
- 6 Open a command prompt and navigate to the extracted folder. Run the `BO_precleanup.bat` script from the extracted folder.
- 7 Reboot the server.
- 8 Run the Microsoft Windows Installer Cleanup Utility (MS Win ICU) located at **Start > Programs > Windows Install Cleanup**.
- 9 In MS Win ICU, highlight BusinessObjects Enterprise XI 3.1 (12.1.0.882)
- 10 Click **Remove**. Click **OK** when the confirmation dialog box displays. Wait for completion. Click **Exit**.

Note: If BusinessObjects does not appear in the MS Win ICU, then go to Add/Remove Programs and click the **Remove** button next to SRM Report Optimizer.

Note: Depending on when the installation or uninstallation failed, there may not be an entry in MS Win ICU or Add/Remove Programs. If there is no entry, you can skip this step.
- 11 Run the `BO_cleanup.bat` script from the command prompt. Make sure that you run the script from the extracted `bo_cleanup_scripts` folder.
- 12 Delete the BusinessObjects installation directory (if it exists).

- 13 Delete the businessobjects folder (if it exists).

Manually importing the 6.2 BIAR file

If the 6.2 BIAR file import fails you must manually import the file. To manually import the file:

- 1 Ensure that the SRM Report Optimizer services are running:
 - a Open the Central Configuration Manager (**Start Menu > Programs > BusinessObjects XI Release 3.1 > BusinessObjects Enterprise > Central Configuration Manager**).
 - b Ensure that the Apache Tomcat 5.5.20 and Server Intelligence Agent services are running.
- 2 If you are upgrading from an expired evaluation license:
 - a Log in to the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48. If you have not changed the password, use the default credentials:
 - Username: Administrator
 - Password: (blank)
 - b In the Organize section, click **Servers**.
 - c Click **Servers List** in the left-hand pane, and then select all of the servers in the right-hand pane.
 - d Right-click the selected servers, and select **Enable Server** to turn on all of the servers in your system.
 - e Expand the **Service Categories** node in the left pane.
 - f Right-click the **Web Intelligence** node, and select **Enable Server**.
 - g Click the **Core Services** node. Select the AdaptiveJobServer and the AdaptiveProcessingServer. Right-click your selection, and select **Enable Server**.
 - h Open the Central Configuration Manager (**Start Menu > Programs > BusinessObjects XI Release 3.1 > BusinessObjects Enterprise > Central Configuration Manager**).
 - i Restart the Server Intelligence Agent service.
- 3 Change the password in the `ImportBiarFile.properties` file:

- a Open the `ImportBiarFile.properties` file located in the installation directory.
 - b For fresh installations:
 change `password=@password@` to `password=`
 For upgrades:
 change `password=@password@` to `password=<your administrator password>`
 - c Save the file.
- 4 Enter the following command at the command line:
`<Installation Directory>\ImportBiarFile.bat INSTALL`
`<Installation Directory> >> <Name of log file>`
 - 5 After the BIAR file import is complete, change the password in the `ImportBiarFile.properties` file back to `password=@password@`.

Failed license installation

If the license installation fails, you must manually install the license:

- 1 Obtain the license key from the `License.txt` file on the installation DVD.
- 2 Launch the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 3 In the Manage section, click **License Keys**.
- 4 Remove the existing license keys by highlighting each key and clicking **Delete**.

Note: Remove all existing keycodes before adding new keycodes.
- 5 In the Add Key box, enter your new license key, and click **Add**.
- 6 Open the Central Configuration Manager (**Start Menu > Programs > BusinessObjects XI Release 3.1 > BusinessObjects Enterprise > Central Configuration Manager**).
- 7 Ensure that the Apache Tomcat 5.5.20 and Server Intelligence Agent services are running.

Error message: Service <Server Name> failed to start

Installing SRM Report Optimizer on systems that support DEP may fail with the following message:

```
Error 1920: Service <Server Name> failed to start, Verify that you have sufficient privilege to start system services.
```

To resolve this issue:

- 1 Disable DEP on the machine. For details, refer to the following web site: <http://msdn.microsoft.com/en-us/library/aa468629.aspx>
- 2 Restart all SRM Report Optimizer servers through the Central Management Console.

Note: DEP can be re-enabled after successful installation of SRM Report Optimizer.

Error message: Account Information Not Recognized

If your license has expired, you will receive the following message on the SRM Report Optimizer Log On page:

```
Account Information Not Recognized: Enterprise authentication could not log you on. Please make sure your logon information is correct.
```

To install a new license, see “[Installing a license key](#)” on page 49.

Warning message: The object named 'Root Folder' with id number '23' may never be modified or deleted

This message may be displayed in the installation log. It can safely be ignored.

Servers disabled after license expiration

If your license expires, the SRM Report Optimizer servers are disabled even after you enter a valid key. To enable the servers:

- 1 Verify that you have created a server group as described in [Creating a server group](#), page 71.

- 2 Log in to the Central Management Console as described in “[Accessing the Central Management Console](#)” on page 48.
- 3 In the Organizer section, click **Servers**.
- 4 Click **Server Groups List**.
- 5 Right-click the **Report Connector Services** group, and select **Enable Server**.

Resetting the Administrator password

To reset the password:

- 1 Go to the command prompt.
- 2 Browse to the install location of the MySQL bin folder.
- 3 Enter the following command:

```
mysql -u sa -h your_ro_server_name -p boe120
```
- 4 Enter the password when prompted.
- 5 Enter the following command:

```
delete from CMS_InfoObjects6 where objectid=12;
```
- 6 Enter quit.
- 7 Restart the MySQL service (BOE120MySQL) from the Services control panel. Click **Yes** when asked to restart the Server Intelligence Agent.

You can now log in to InfoView with the default password (blank).

