



Installation Guide

QAD Business Intelligence

QAD BI OpenEdge 10 Edition
QAD BI Progress 9 Edition

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Overview

This document describes how to install QAD Business Intelligence.

The product is available in Progress 9 and OpenEdge 10 editions.

For ease of use, the document provides a stand-alone section that covers installation and use of each edition:

- Section 1, “QAD BI OpenEdge 10 Edition,” beginning on page 5
- Section 2, “QAD BI Progress 9 Edition,” beginning on page 37

This guide applies to multiple versions of the QAD enterprise resource planning (ERP) application, from MFG/PRO 9.0 through the current release of QAD 2008 Enterprise.

During the product life cycle, QAD changed the name of the former MFG/PRO eB2.1 product to QAD 2008 Standard. Individual releases are identified by a decimal number; for example, QAD 2008.1 Standard. (The Service Pack 5 and 6 releases were branded as QAD 2007 and QAD 2007.1, respectively.) The Enterprise Financials version of the product is called QAD 2008 Enterprise and follows the same convention of identifying individual releases with a decimal number.

This document uses QAD 2008 Enterprise throughout to refer to those products, except in situations where it discusses a specific release.

Other Related Documentation

- For information on how to use and implement QAD Business Intelligence, see *User Guide: QAD Business Intelligence*.
- For information about Cognos 8, see the documentation from Cognos.

- For information on the QAD-provided models and key performance indicators (KPIs), see *Reference Guide: QAD Business Intelligence Key Performance Indicators*. This is provided on the installation CD for each model you purchased.
- For information about functions in the QAD 2008 Enterprise, see the relevant user guide.
- For information about implementing the QAD .NET user interface, see *Installation Guide: QAD User Interfaces*.
- For information about QAD ReportNet Bundle, see *QAD .NET UI 2.7 Release Notes*.
- For information about Access, see the documentation from Microsoft Corporation.

QAD Web Site

QAD's Web site provides a wide variety of information about the company and its products. You can access the Web site at:

<http://www.qad.com>

For users with a QAD Web account, product documentation is available for viewing or downloading from the QAD Online Support Center at:

<http://support.qad.com/>

You can register for a QAD Web account at the QAD Online Support Center. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with QAD.

Most user documentation is available in two formats:

- Portable document format (PDF). PDF files can be downloaded from the QAD Web site to your computer. You can view them with the free Adobe Acrobat Reader.
- HTML. You can view user documentation through your Web browser. The documents include search tools for easily locating topics of interest.

Conventions

This document uses the text or typographic conventions listed in the following table.

| If you see: | It means: |
|--------------------------------------|--|
| monospaced text | A command or file name. |
| <i>italicized</i> monospaced text | A variable name for a value you enter as part of an operating system command; for example, <i>YourCDROMDir</i> . |
| indented command line | A long command that you enter as one line, although it appears in the text as two lines. |
| Note | Alerts the reader to exceptions or special conditions. |
| Important | Alerts the reader to critical information. |
| Warning | Used in situations where you can overwrite or corrupt data, unless you follow the instructions. |



Section 1

QAD BI OpenEdge 10 Edition

This section covers installation and upgrade of QAD Business Intelligence OpenEdge 10 Edition.

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Installing QAD BI, OpenEdge 10 Edition

The following topics provide the information required for installing the QAD Business Intelligence (QAD BI) solution. They also provide guidelines and information for setting up or configuring required and optional third-party applications.

If you are an existing customer who is upgrading an installed version of QAD BI, you can skip the instructions in this chapter and go directly to Chapter 2, “Upgrading QAD BI, OpenEdge 10 Edition,” on page 35.

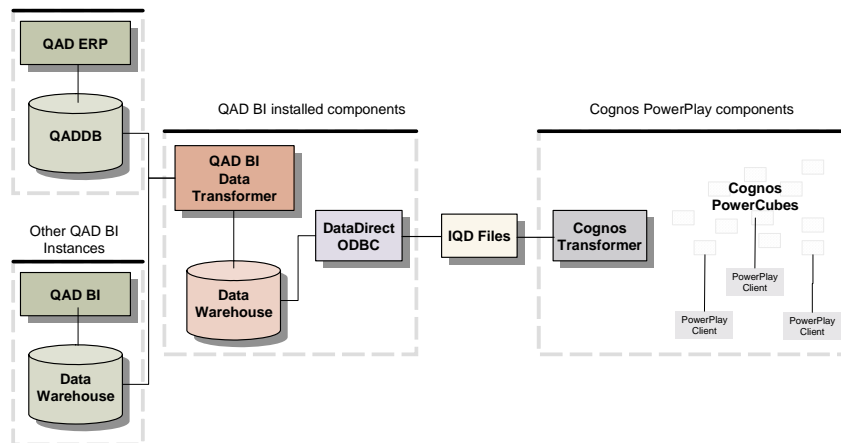
See *User Guide: QAD Business Intelligence* for information on using the features of QAD BI.

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Overview

QAD BI provides a complete business intelligence solution for analyzing data residing in QAD 2008 Enterprise and other data sources. It extracts and transforms data from one or many data sources using flexible rules and stores this information in a data warehouse. Prebuilt QAD 2008 Enterprise models support powerful multidimensional analysis against the data warehouse using Cognos 8. Figure 1.1 illustrates the overall structure of the solution.

Fig. 1.1
Component
Overview



System Requirements

Supported Platforms

Data Transformer runs on Windows 2000, XP, and 2003.

Data warehouse can be installed on both Windows and Unix.

Minimum Hardware Requirements

- Pentium III, 500 MHz or higher
- Minimum 1 GB RAM
- 1 GB hard disk space or more depending on the size of the data warehouse

Note Generalizations about hardware must be evaluated with an understanding of the amount of data that will be processed through QAD BI. The server hosting the data warehouse should follow recommended practices for supporting Progress databases and (if implemented) Cognos Cubes.

For minimum hardware requirements to install and run Cognos 8 components, see Chapter 5, “Installing Cognos 8,” in the *Cognos 8 Business Intelligence Installation and Configuration Guide*.

Supported QAD 2008 Enterprise Versions

Data Transformer works with any service pack level of MFG/PRO 9.0, eB, eB2, and eB2.1, QAD 2007, as well as QAD 2008 Standard and QAD 2008 Enterprise, running on Progress 9.1D and up.

QAD BI is available in the following languages: English, French, Spanish, German, Dutch, Simplified Chinese, Traditional Chinese, Japanese, Korean, and Polish.

Prerequisite Software Components

The following components are required for the installation of the QAD BI Data Transformer:

- OpenEdge 10.1B with the following components:
 - OE Application Server Basic or OE Application Server Enterprise
 - OE Enterprise RDBMS
 - 4GL Development System
- Microsoft ActiveX Control Pad or any of Microsoft Office components, such as Microsoft Word or Microsoft Access

Note Microsoft ActiveX Control Pad 1.0 can be downloaded from <http://msdn2.microsoft.com/en-us/library/ms968493.aspx>. Contact Microsoft for support of this utility.

The following component is required when creating Cubes for use with Cognos 8:

- Cognos BI Transformer Edition

The following component is required when creating and managing business-related metadata for use in Cognos 8 analysis and reporting on the Web:

- Cognos Framework Manager

The following components are required when implementing Web-based Cognos 8 interfaces:

- Cognos 8 Server
- HTTP Server
 - On Windows 2000 or Windows XP: Microsoft Internet Information Services
 - On Windows 2003: Application Server

The following components are required when extracting data from non-Progress data sources:

- OpenEdge Oracle DataServer
- OpenEdge MS SQL Server DataServer
- OpenEdge ODBC DataServer

The following component is required to process data warehouse tasks in parallel:

- OpenEdge AppServer

The following components are required to publish QAD-provided dashboards in the QAD .NET user interface:

- QAD 2007.1 or later using the applicable version of QAD .NET UI
- QAD ReportNet Bundle 1.0 for QAD .NET UI 2.5 or QAD ReportNet Bundle 1.1 for QAD .NET UI 2.7

Important QAD ReportNet Bundle 1.1 is delivered on the QAD .NET UI 2.7 installation media. It must be installed after QAD .NET UI 2.7 and Cognos 8 are installed and properly configured. See “Install QAD ReportNet Bundle” on page 30.

For information on implementing the dashboards, see *User Guide: QAD Business Intelligence*.

In addition, the following component is required if you want to customize or design your own reports and dashboards:

- Cognos Report Studio

Performance

The following suggestions are general recommendations that should boost performance in most implementations:

- The data warehouse database should be located on the same server as the QAD BI Data Transformer.
- The Cognos Cubes should be generated on the same server as the QAD BI Data Transformer.
- The network connections between the server hosting Data Transformer and the QAD 2008 Enterprise servers should be capable of supporting large data transfers efficiently.

Installation Media

The QAD BI software suite is packaged on multiple CDs. Depending on your purchase order, you may have received a CD to install the QAD BI Data Transformer, a CD to install the common business model architecture components, as well as CDs to install each of the QAD-provided business models.

The complete QAD BI suite includes the following media:

- QAD BI Data Transformer
- QAD BI Common Model components
- QAD BI Sales Analysis Model
- QAD BI Financial Controlling Model
- QAD BI Service Performance Model
- QAD BI Manufacturing Performance Model
- QAD BI Inventory Monitoring Model
- QAD BI Forecasting Model
- QAD BI Purchasing/Vendor Rating Model

- QAD BI Dashboards (Sales Management, Warehouse Management, Purchasing Management)

Installation Steps

Installing QAD BI is a multi-step process. Each step is detailed in the following sections. Complete each step before moving on to the next. Each task is discussed in its own section:

- Verify Prerequisite Components
- Set Up Language Support
- Install the QAD BI Data Transformer Files
- Install the Common Components and Business Models
- Install the Cognos Components

Note QAD recommends you install QAD BI in a test environment first.

Verify Prerequisite Components

Progress

QAD BI requires the Enterprise database components of OpenEdge 10.1B. Use the OpenEdge installation instructions to install the necessary components. Once they have been installed, verify that they are functioning properly by stopping and starting the OpenEdge AdminService and connecting to the service using the Progress Explorer tool.

To stop and start the OpenEdge AdminService:

- 1 Launch the Windows Services Manager (Start|Control Panel|Administrative Tools|Services).
- 2 Right-click AdminService for OpenEdge and choose Stop.
- 3 Right-click AdminService for OpenEdge and choose Start.

To connect to the service using the Progress Explorer tool:

- 1 Launch the Progress Explorer (All Programs|OpenEdge|Progress Explorer).
- 2 Right-click the Progress Explorer node and choose Add Progress Server.
- 3 Choose OK to configure a local server.
- 4 Right-click the localhost node and choose Connect.

Important QAD recommends setting the OpenEdge AdminService startup type to Manual. On some systems, Progress errors occur periodically when the service is set to Automatic. Anytime the server is rebooted, the service must be manually started.

Progress System Variables

Before you proceed with the QAD BI installation, you should:

- Verify that the DLC and PROMSGS system variables are set.
- Verify that the *ProgressInstallDir\bin* directory is in the system path variable.

Use these steps to verify the system variable and path information:

- 1 On your Windows Desktop, right-click My Computer and choose System Properties.
- 2 Click the Advanced tab and choose Environment Variables.
- 3 Verify that DLC and PROMSGS are set. If they are not, click New and enter the variable name and value to set the missing variables:

```
DLC=ProgressInstallDir
```

```
PROMSGS=ProgressInstallDir\promsgs
```

- 4 Double-click the Path system variable. Review the value to make sure the *ProgressInstallDir\bin* directory is included. If it is not included, add it to the end of the path, delimited by a semicolon (;).

SMTP Mail Server Account

A valid SMTP (outgoing) mail server account is required when configuring Cognos Server. The account will be used to send reports by e-mail.

Make sure you know the following information:

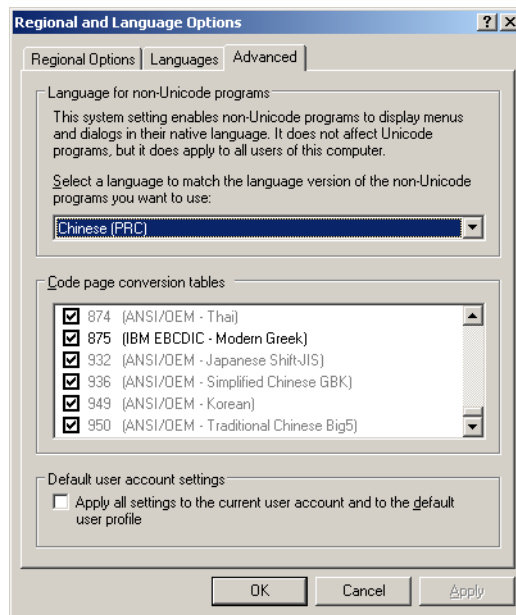
- Host name and port of your SMTP mail server
- Account and password for the SMTP mail server

Set Up Language Support

To support different languages when displaying Cubes in Cognos PowerPlay Transformer, you must set special language encoding and fonts in the Windows operating system:

- 1 To set language encoding, choose Start|Control Panel|Regional and Language Options|Advanced.

Fig. 1.2
Regional and
Language Options



- 2 From the Language for non-Unicode programs frame, choose the language you require.

- 3 From the Code page conversion tables frame, select the code page conversion tables you require.

Install the QAD BI Data Transformer Files

This section includes the information you need to install the QAD BI Data Transformer program and data files using the QAD BI Data Transformer installation CD.

To begin the installation of Data Transformer, launch `install.bat` from the `etl-progress10` directory on the installation CD; To install data warehouse on Unix, launch `install.sh`. You are then prompted to provide several installation parameters. Use the following descriptions as a guide.

Note If you copy the installation files from the installation CD to a directory on the hard drive and execute the installation scripts from there, the directory path must not contain blank spaces.

Note The values you provide are saved in `<%system program file%>\Common Files\qadbi\qadbi.cfg` and are used as defaults on subsequent QAD BI installations.

Important If you specify a Program Files directory where the QAD BI Data Transformer was previously installed, you are prompted either to upgrade or to replace the existing installation.

- Choosing to upgrade the existing installation updates the QAD BI program files to the installed version while retaining the existing data warehouse configuration and data.
- Choosing to replace the existing installation completely replaces all program and data files.

BI component to install. Specify which BI Data Transformer component you want to install on this machine:

- Enter 1 to install the data warehouse database
- Enter 2 to install the administration database
- Enter 3 to install the ETL tool
- Enter 4 to exit the installation program.

Important Data Transformer lets you deploy the data warehouse database (dwh), the administration database (dwh-admin), and the ETL Tool separately on different machines. However, you must install the database components before installing the ETL tool.

Install the Data Warehouse Database

Note The data warehouse is deployed using the utf-8 code page by default.

Progress Directory. Enter the location where Progress is installed.

DWH Directory. Specify the directory where the data warehouse database will be installed. The directory name should not contain spaces.

DWH Storage Type. Specify how you want the data warehouse to be created.

Standard: Create a standard small-sized data warehouse database.

Large: Create a large data warehouse database of at least 10 GB.

Custom: Create your own structure description file to define the data warehouse database.

DWH Database Structure Description File Location. If you choose to create a custom DWH database, specify the location of the DWH database structure description file.

Data Warehouse Database Name. Specify the name assigned to the data warehouse database in the Progress Explorer tool.

Data Warehouse Database Port. Specify the TCP-IP port to use for the data warehouse database server in the Progress Explorer tool.

Install the Administration Database

Note The administration databases is deployed using the utf-8 code page by default.

Progress Directory. Enter the location where Progress is installed.

Administration Database Directory. Specify the directory where the data warehouse administration database will be installed. The directory name should not contain spaces.

DWH-Admin Storage Type. Specify how you want the administration database to be created.

Standard: Create a standard small-sized DWH administration database.

Custom: Create your own structure description file to define the DWH administration database.

Administration Database Structure Description File Location. If you choose to create a custom DWH-Admin database, specify the location of the database structure description file.

Administration Database Name. Specify the name assigned to the Administration database in the Progress Explorer tool.

Administration Database Port. Specify the TCP-IP port to use for the Administration database server in the Progress Explorer tool.

Install the ETL Tool

Progress Directory. Specify the directory where Progress is installed.

Program Files Directory. Specify the directory where program files will be installed. The directory name should not contain spaces.

Data Directory. Specify the directory where the data warehouse and administration databases will be installed. The directory name should not contain spaces.

Data Warehouse Database Name. Enter the name assigned to the data warehouse database in the Progress Explorer tool.

DWH Server Address. Enter the address where the Data Warehouse database server resides.

Data Warehouse Database Port. Enter the TCP-IP port used by the data warehouse database server in the Progress Explorer tool.

Administration Database Name. Enter the name assigned to the Administration database in the Progress Explorer tool.

DWH Administration Server Address. Enter the address where the Data Warehouse Administration database server resides.

Administration Database Port. Specify the TCP-IP port to use for the Administration database server in the Progress Explorer tool.

Program Group. Specify the name of a program group where application shortcuts will be installed.

After you enter the required installation parameters, several automated tasks execute and a status screen displays.

After the installation script completes, exit the DOS screen.

Install the Common Components and Business Models

Your QAD BI package may include several business model CDs. This section includes information to help you install the common model components and the business models. The same steps are used to install each of these components. You can install the business model CDs in any order once the common model components have been installed.

To begin the installation, launch `install.bat` from the selected CD.

You are then prompted to provide several installation parameters. Use the following descriptions as a guide.

Note The values you provide are saved in the system registry and are used as defaults on subsequent QAD BI installations.

Program Files Directory. Specify the directory where program files will be installed. The directory name should not contain spaces.

Data Directory. Specify the directory where the business models will be installed. The directory name should not contain spaces.

Install the Cognos Components

The installation steps described here assume that you are installing all Cognos 8 components on one computer. For other Cognos 8 installation options, see Chapter 7, “Installation Options,” in the *Cognos 8 Architecture and Planning Guide*.

Use the steps in this section to install and configure:

- Cognos PowerPlay Transformer, included on the Cognos BI Transformer 7.3 MR2 CD

- Cognos Server, included on the Cognos 8 Analysis User (Web Client NU) CD
- Cognos Framework Manager, included on the Cognos 8.2 OLAP Modeling / PowerPlay Administrator CD

Install and Configure Cognos PowerPlay Transformer

Installing Cognos PowerPlay Transformer

- 1 Insert the Cognos BI Transformer 7.3 MR2 CD.
- 2 Select Install PowerPlay Transformer Edition for Windows.
- 3 Select all default options unless using a double-byte language.
If you need to use a double-byte language in BI, on the Character Set Selection screen, select Locales for other languages.
- 4 On the Component Configuration screen, select the following option button and click Next.

`Exit the Installation Wizard without configuring components. You must later configure the components to complete the installation.`
- 5 On the Finish screen, click Finish.
- 6 Click Exit.

Applying the Current Configuration

- 1 From the Windows Start menu, choose All Programs|Cognos 8|Tools|Configuration Manager.
- 2 On the Cognos Configuration Manager Welcome screen, choose the Open the current configuration option under the Start tab.
- 3 In the Configuration Manager Explorer panel, right-click the top-level node that has your computer name and choose Apply Selection.
- 4 Click Yes at the prompt for confirmation.
- 5 The Configuration Manager application progress bar displays. When the application process is complete, click OK and exit Configuration Manager.

Note When the following warning message displays, ignore it and choose OK:

```
Warning: Could not complete Apply for  
YourComputerName.
```

Set Up Cognos Access Manager

You must set up Cognos Access Manager to use Impromptu Query Definition (.iqd) files to create Cubes.

Defining Administration Settings

- 1 From the Windows Start menu, select All Programs|Cognos 8|Tools| Access Manager–Administration.
- 2 In the left pane, right-click Local Authentication Export Files and select Add .LAE File.
- 3 Click the General tab and enter the following values:
Logical name: QADBIsecurity
File name: *CognosInstallDir*\cer*N*\bin\qadbi.lae
Where *N* is the rendition number of the Cognos version you installed, such as cer3 or cer4.
- 4 Click the Ticket Server tab and enter the following values:
Host: localhost
Port: 9010
- 5 Click OK.
- 6 Click Yes at the following prompt:
The ticket server host and port are not valid or the ticket server is not responding. Are you sure you want to save this ticket server information?
- 7 Click No at the following prompt:
Does this LAE file need to be compatible with Series 7.0 and earlier versions?
- 8 Right-click QADBIsecurity and select Add Namespace.

- 9 On the namespace screen, enter the following value:
Name: QADBInamespace
 - 10 Click OK.
 - 11 Choose File|Save As and enter the following value:
File name: *CognosInstallDir\cerN\bin\qadbi.csa*
Where *N* is the rendition number of the Cognos version you installed, such as cer3 or cer4.
 - 12 Click Save.
 - 13 Choose File|Exit.
- Note** See the *Cognos Access Manager Administrator Guide* for information on how to control access to Cognos resources by creating users and user classes.
- 14 From the Windows Start menu, select All Programs|Cognos 8|Tools|Access Manager–Configuration Wizard.
 - 15 On the Access Manager–Configuration Wizard screen, click Next.
 - 16 Select the Custom radio button and click Next.
 - 17 Select the Local Authentication Export file (LAE) configuration check box and click Next.
 - 18 Click Browse and select the *qadbi.lae* file created earlier and click Next.
 - 19 Select the QADBInamespace radio button and click Next.
 - 20 Select the Local Authentication Export file (LAE) radio button and click Next.
 - 21 Select the Accept the settings check box and click Finish.

Defining the Data Warehouse Database in Access Manager

- 1 In Access Manager, select the Data Sources folder and from the Action menu, click Add Database.
- 2 The Database Properties dialog box appears. On the General tab, in the Name box, type a name for the data warehouse database; for example, dwh.
- 3 Click the Connection tab.
- 4 In the Database Type drop-down list, select ODBC.
- 5 To specify the connection string, click Edit.
- 6 The Database Definition dialog box appears. Enter the required connection information.

Logical Database Name. Enter a logical database name for the data warehouse database, such as dwh.

ODBC Data Source. Select the ODBC Data Source Name (DSN) created by the installation using the Data Warehouse Database Name installation parameter.

User ID and Password. Select both options.

- 7 Click OK.

Setting Up Auto-Access for the Data Warehouse Database

To set auto-access to the data warehouse database, you must create a signon for the database using a user ID and password. After the signon is created, it applies to Administrator for anonymous access. This provides the account auto-access to the database so that Cognos Transformer can log on to Access Manager without prompting for user ID and password.

- 1 In Cognos Access Manager, double-click the Data Sources folder to open it.
- 2 Double-click the dwh data source.
- 3 Select the Signons folder.
- 4 From the Action menu, click Add Database Signon.

- 5 In the User ID box, type `dwh`, which is the user ID required to access the data warehouse database.
- 6 Enter the database password—`admin`—in the Password and Verify Password boxes.
- 7 Click OK.
- 8 Under the Authentication Information folder, double-click Users|Administrator.
- 9 The User Properties dialog box appears. Click Set and select the `dwh` signon; then click OK.
- 10 Right-click `QADBInamespace` and choose Properties.
- 11 The Namespace Properties dialog box appears. Under the Settings tab, select Use the following account for anonymous access and enter Administrator in this field; then click OK.

Applying Access Manager Configurations

- 1 In Access Manager, choose Tools|Runtime Configuration.
- 2 Configuration Wizard appears. Select Local Authentication Export file (LAE) configuration and keep clicking Next till you finish the wizard.

Install and Configure Cognos Server

Installing Cognos Server

- 1 Launch the Cognos Server installation program (`win32\isssetup.exe`) from the Cognos 8 Analysis User (Web Client NU) installation CD.
- 2 Select all default options unless using a double-byte language.
If you need to use a double-byte language in BI, on the Character Set Selection screen, select Locales for other languages.
- 3 Select Cognos Content Database in the installation wizard.
- 4 On the Finish screen, click Finish.

Creating the Content Store

The content store is a database that Cognos Content Manager uses to store global configuration data, global settings (such as the language and currency formats shown in the user interface), connections to data sources, and product-specific content. Design models and log files are not stored in the content store.

By default, Cognos 8 products share the content store database.

Use Cognos content database as the content store database. For details on how to create the content store in Cognos Configuration, see *Cognos 8 Installation and Configuration Guide*.

Installing HTTP Server

To access Cognos 8 interfaces through the Cognos 8 Web portal, you must install and configure an HTTP server to host Cognos Server files and components.

Use Microsoft Internet Information Services on Windows 2000 or Windows XP; use Application Server on Windows 2003.

- 1 From the Windows Start menu, choose Control Panel|Add or Remove Programs.
- 2 In the left pane, click Add/Remove Windows Components.
- 3 On the Windows Components Wizard screen, check one of the following:
 - Internet Information Services (IIS) box when the target machine is running Windows 2000 or Windows XP
 - Application Server when the target machine is running Windows 2003
- 4 Click Next.
- 5 Accept the default options to complete the installation unless you are using IIS 6.0.

If you use IIS 6.0, ensure that the CGI extension can be executed by doing this:

- a Go to your IIS 6.0 control panel.
- b Select Web Service Extensions from the left tree.
- c Select All Unknown CGI Extensions and click Allow.
- d When prompted to confirm, click Yes.

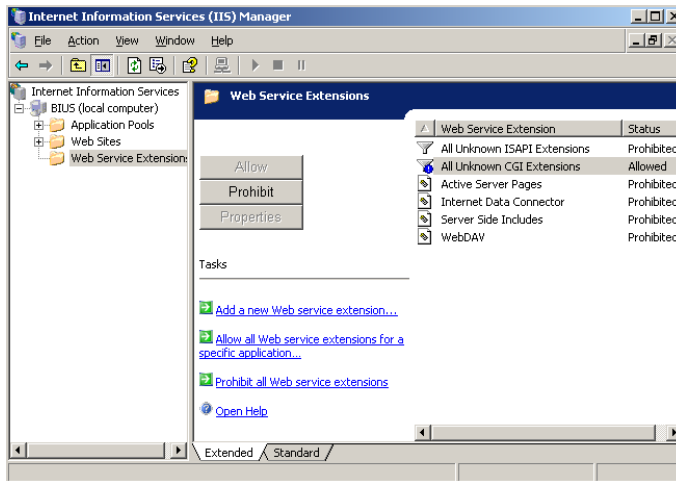


Fig. 1.3
Internet
Information
Services Manager

Configuring HTTP Server

Before you use Web pages generated by Cognos 8, you must configure your Web server. You must set up virtual directories, also known as Web aliases, for the directories that contain the HTML and Web files for Cognos 8.

| Alias | Location | Permission |
|-----------------|--|----------------------------|
| cognos8 | <i>CognosSvrInstallDir</i> \webcontent | Read, Run-scripts |
| cognos8/cgi-bin | <i>CognosSvrInstallDir</i> \cgi-bin | Read, Run-scripts, Execute |
| cognos8/help | <i>CognosSvrInstallDir</i> \webcontent\documentation | Read, Run-scripts |

Note *CognosSvrInstallDir* is the directory where you installed Cognos Server.

Use these steps to configure Internet Information Server:

- 1 In the left pane of the Internet Information Services Manager window, expand the folder that has your computer name and then expand the Web Site folder.
- 2 Right-click the folder that contains the Web site where you will run your Cognos product and choose New|Virtual Directory. If you have only one Web site, its default name is `Default Web Site`.
- 3 In the Virtual Directory Creation Wizard dialog box, click Next.
- 4 In the Alias text box, enter `cognos8`, and then click Next.
- 5 Click Browse, select the `CognosSvrInstallDir\webcontent` folder, and then click Next.
- 6 Ensure that the Read and Run-scripts check boxes are selected, and then click Next.
- 7 Click Finish.
- 8 In the left pane of Internet Information Services Manager, right-click the `Cognos8` folder you just created and choose New|Virtual Directory.
- 9 In the Virtual Directory Creation Wizard dialog box, click Next.
- 10 In the Alias text box, enter `cgi-bin`, and then click Next.
- 11 Click Browse, select the `CognosSvrInstallDir\cgi-bin` folder, and then click Next.
- 12 Ensure that the Read, Run-scripts, and Execute check boxes are selected, and then click Next.
- 13 Click Finish.
- 14 In the left pane of Internet Information Services Manager, right-click the `Cognos8` folder and choose New|Virtual Directory.
- 15 In the Virtual Directory Creation Wizard dialog box, click Next.
- 16 In the Alias text box, enter `help`, and then click Next.

- 17 Click Browse, select the following folder, and then click Next:
CognosSvrInstallDir\webcontent\documentation
- 18 Ensure that the Read and Run-scripts check boxes are selected, and then click Next.
- 19 Click Finish.
- 20 The HTTP server is configured. Exit IIS Manager.

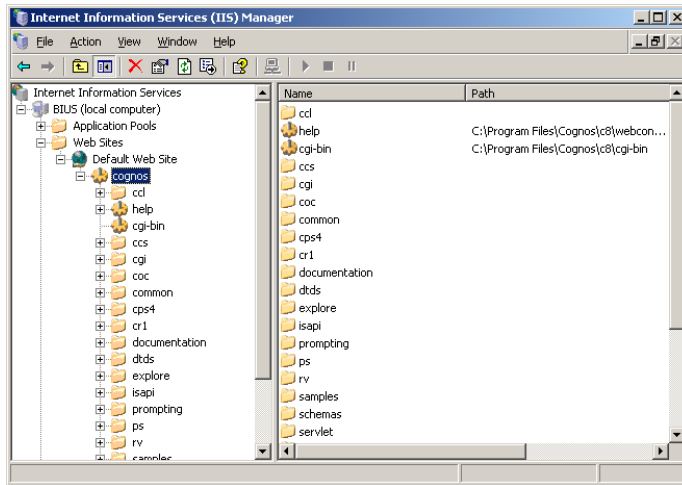


Fig. 1.4
Configure Internet Information Services

Configuring Web Browsers

Cognos 8 uses the default browser configurations provided by Microsoft, Netscape, and Firefox. For all browsers, you must ensure that settings are enabled for cookies and Java scripts. Additional required settings are specific to the browser.

| Browser | Setting | Cognos Component |
|-------------------|--|------------------|
| Internet Explorer | Run ActiveX controls and plug-ins Script ActiveX controls marked safe for scripting | Analysis Studio |

Table 1.1
Web Browser Settings

| Browser | Setting | Cognos Component |
|----------|--|-------------------|
| Netscape | Allow Cookies JavaScript | Cognos Connection |
| Firefox | Allow Cookies Enable Java Enable JavaScript Load Images | Cognos Connection |

Configuring Cognos Server Components

After you install the Cognos Server components, the following configuration tasks are required.

Specifying a Mail Server Account

If you want to send reports by e-mail, you must configure a mail server account.

- 1 In the Cognos Configuration Explorer window, under Data Access, click Notification.
- 2 In the Properties window, for the SMTP mail server property, enter the host name and port of your SMTP (outgoing) mail server.
- 3 Click the Value box next to the Account and password property and then click the edit button when it appears.
- 4 Enter the appropriate values in the Value – Account and password dialog box and then click OK.

Note If log-on credentials are not required for the SMTP server, remove the default information for the Account and password property. When you are prompted for confirmation to leave this property blank, click Yes. Ensure that the default user name has been removed. Otherwise, the default account is used and notifications will not work properly.

- 5 In the Properties window, enter the appropriate value for the default sender account.
- 6 Right-click Notification in the Explorer window and choose Test to test the mail server connection.

- 7 On the File menu, click Save.

Testing the Server Components

You can test your configuration settings by running the test feature before you start the Cognos 8 service. Then you can test the installation by starting the Cognos 8 service and then opening Cognos Connection. On Windows, the Cognos 8 service is configured to start automatically by default.

- 1 Start Cognos Configuration.
- 2 Ensure that you save your configuration; otherwise, you will not be able to start the Cognos 8 service.
- 3 In the Explorer window, click Local Configuration.
- 4 On the Actions menu, click Test.
Cognos Configuration checks the CSK availability; tests the namespace configuration; and tests the connections to the content store, logging database, notification database, and mail server.
- 5 If any test fails, reconfigure the affected properties and then test again. Do not start the service until all tests pass.
- 6 On the Actions menu, click Start.
It may take a few minutes for the Cognos 8 service to start. This action starts all installed services that are not running. If you want to start a particular service, select the service node in the Explorer window and then click Start on the Actions menu.
- 7 Open a Web browser.
- 8 Enter the following in the address bar and press Enter, where `cognos8` is the virtual directory you created when you configured the Web server:

```
http://host_name:port/cognos8
```
- 9 It may take a few minutes for the Web page to open. If you see the Welcome page of Cognos Connection, your Cognos 8 installation is working.

Install and Configure Cognos Framework Manager

You must install and configure Cognos Framework Manager before you can use Cognos 8 for analysis.

Use these steps to install Cognos Framework Manager:

1 Launch the Cognos Framework Manager installation program (`win32\sssetup.exe`) from the Cognos 8.2 OLAP Modeling/PowerPlay Administrator CD.

2 Select all default options.

3 Select Framework Manager in the Component Selection screen.

4 Click Yes at the following prompts:

Warning: You are installing to the same location as a previous installation. Do you want to continue?

This installation will replace existing files. Select Yes to automatically create a backup of all files that are replaced.

5 On the Finish screen, click Finish.

Configure an NTLM or LDAP Namespace

You can configure Cognos 8 components to use the Windows native security, NT LAN Manager (NTLM), as the authentication source, or configure a new LDAP namespace for use with Sun ONE Directory Server.

See the related Cognos 8 documentation for information about how to configure namespaces in Cognos.

Install QAD ReportNet Bundle

Note This step is only required if you want to implement the advanced reporting and dashboard functionality to create QAD-provided dashboards or custom reports in the QAD .NET user interface.

QAD ReportNet Bundle 1.1 is delivered on the QAD .NET UI 2.7 media. It must be installed after QAD .NET UI 2.7 and Cognos 8.2 are installed and properly configured.

Perform the following steps to install QAD ReportNet Bundle 1.1 on the Cognos server.

- 1 If the Cognos 8 service is running, launch Cognos Configuration and choose Action|Stop to stop the Cognos 8 service.
- 2 Launch `install.exe` from the QAD ReportNet Bundle installation CD; to install QAD ReportNet Bundle on Unix, launch `install.sh`.
- 3 An introduction screen displays. Choose Next to continue.
- 4 The Cognos Server Configuration screen displays.



Fig. 1.5
Cognos Server
Configuration

Enter or view the following information:

Cognos Installation Directory. Enter the directory where Cognos is installed.

Cognos Dispatcher URL. Use the default dispatcher URL value.

Cognos Version. Indicates the version of Cognos installed.

Operating System. Indicates the server operating system.

Choose Next to continue.

- 5 The installation program checks the status of the Cognos 8 service. If the service is running, you will be asked to stop it first before proceeding.

- 6 On the Admin Database Configuration screen, enter the correct information to connect to the QAD 2008 Enterprise administration database.

Fig. 1.6
QAD 2008
Enterprise Admin
Database
Configuration

Host. Enter the QAD 2008 Enterprise database server name.

Port. Enter the TCP/IP port on which the QAD 2008 Enterprise administration database is listening for connections.

Database. Enter the logical name of the QAD 2008 Enterprise administration database.

User and Password. Enter the correct user/password combination for connecting to the QAD 2008 Enterprise administration database. Contact your QAD 2008 Enterprise administrator for this information.

Choose Next to continue.

- 7 On the Home Service Configuration screen, enter the correct information relating to the QAD .NET UI 2.7 implementation.



Fig. 1.7
Home Service
Configuration

Service URL. Enter the URL pointing to the QAD .NET UI home server (the Tomcat instance where it is running).

Environment Name. Specify a system environment as defined on the QAD .NET UI home server in the `.. / configurations / SysEnv` directory.

Environment Name Key. Leave this field blank. The field is currently not used.

Choose Next to continue.

- 8 An installation summary screen displays. If all information is correct, click Install to proceed with the installation.



Fig. 1.8
Installation
Summary

- 9** When installation is complete, exit the installation program.
- 10** Start the Cognos 8 service.



Chapter 2

Upgrading QAD BI, OpenEdge 10 Edition

Overview 36

Install the New Data Transformer Files 36

Overview

If you are upgrading QAD BI to release 2.7 from a release prior to 2.5, you must upgrade to QAD BI 2.5 first. For details on upgrading to QAD BI 2.5, see *QAD Business Intelligence 2.5 Technical Reference Guide*.

Prior to Upgrading

Make sure you back up your data warehouse prior to upgrading QAD BI.

If you are upgrading from QAD BI Progress 9 Edition or OpenEdge 10.1A, you must first convert your data warehouse and administration databases (dwh and dwh-admin) to OpenEdge release 10.1B. For information on converting previous versions of Progress databases to OpenEdge release 10.1B, see *OpenEdge Data Management: Database Administration Guide*.

Install the New Data Transformer Files

To upgrade QAD Business Intelligence from version 2.5 to 2.7, you only need to install the new QAD BI Data Transformer files.

See “Installation Steps” on page 12 for detailed information on installing the new QAD BI Data Transformer program and data files.

The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are arranged in a way that they appear to be part of a larger mechanical system. The lighting is soft, creating a sense of depth and texture. The gears are slightly out of focus, giving the image a professional and technical feel.

Section 2

QAD BI Progress 9 Edition

This section covers installation and upgrade of QAD Business Intelligence Progress 9 Edition.

Installing QAD BI, Progress 9 Edition **39**

Upgrading QAD BI, Progress 9 Edition **69**

Installing QAD BI, Progress 9 Edition

The following topics provide the information required for installing the QAD Business Intelligence (QAD BI) solution. They also provide guidelines and information for setting up or configuring required and optional third-party applications.

If you are an existing customer who is upgrading an installed version of QAD BI, you can skip the instructions in this chapter and go directly to Chapter 4, “Upgrading QAD BI, Progress 9 Edition,” on page 69.

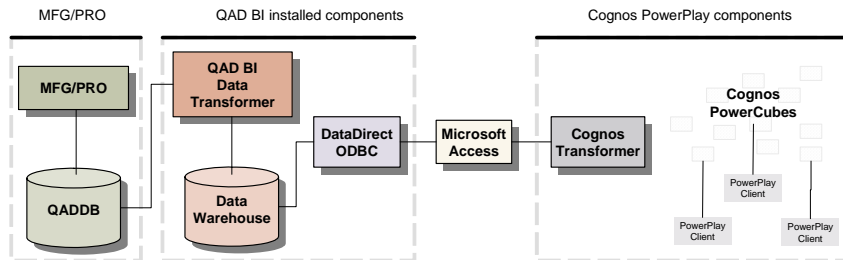
See *User Guide: QAD Business Intelligence* for information on using the features of QAD BI.

| | |
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| <i>System Requirements</i> | 40 |
| <i>Installation Media</i> | 43 |
| <i>Installation Steps</i> | 43 |

Overview

QAD BI provides a complete business intelligence solution for analyzing data residing in MFG/PRO and other data sources. It extracts and transforms data from one or many data sources using flexible rules and stores this information in a data warehouse. Prebuilt MFG/PRO models support powerful multidimensional analysis against the data warehouse using Cognos 8. Figure 3.1 illustrates the overall structure of the solution.

Fig. 3.1
Component
Overview



System Requirements

Supported Platforms

The Data Transformer runs on Windows 2000, XP, and 2003.

Minimum Hardware Requirements

- Pentium III, 500 MHz or higher
- Minimum 1 GB RAM
- 1 GB hard disk space or more depending on the size of the data warehouse

Note Generalizations about hardware must be evaluated with an understanding of the amount of data that will be processed through QAD BI. The server hosting the data warehouse should follow recommended practices for supporting Progress databases and (if implemented) Cognos PowerCubes.

For minimum hardware requirements to install and run Cognos 8 components, see Chapter 5, “Installing Cognos 8,” in the *Cognos 8 Business Intelligence Installation and Configuration Guide*.

Supported MFG/PRO Versions

The Data Transformer works with any service pack of MFG/PRO 9.0, eB, eB2, and eB2.1 running on Progress 9.

Note For MFG/PRO 9.0 running on Progress 8.3, you need QAD BI 2.0.

QAD BI is available in the following languages: English, French, Spanish, German, Dutch, Simplified Chinese, Traditional Chinese, Japanese, Korean.

Your source MFG/PRO database can use any Western European language based on code page ISO8859-1. Or it can use any of the following supported double-byte languages: Simplified Chinese, Traditional Chinese, Japanese, Korean. If you want to use QAD BI with multiple data sources and multiple languages, only the following combinations are supported:

- Any combination of ISO8859-1 languages
- English and any one of the supported double-byte languages

Third-Party Software Components

The following components are required for the installation of QAD BI Data Transformer:

- Progress 9.1D or 9.1E with the following components:
 - Provision Plus
 - Enterprise DB
 - 4GL Development System
- DataDirect SequeLink Server and ODBC Edition Client 4.5

The following component is required for all installations of QAD BI.

- Microsoft Access 2000, 2002, or 2003

Note Microsoft Access is only used to maintain data relationships. It is not used to store MFG/PRO data.

The following component is required when creating PowerCubes for use with Cognos 8:

- Cognos PowerPlay Transformer
- Cognos Server

The following component is required when creating and managing business-related metadata for use in Cognos 8 analysis and reporting:

- Cognos Framework Manager

The following components are required when implementing Web-based Cognos 8 interfaces:

- Cognos Server
- HTTP Server
 - On Windows 2000 or Windows XP: Microsoft Internet Information Services
 - On Windows 2003: Application Server

The following components are required when extracting data from non-Progress data sources:

- Progress Oracle DataServer
- Progress MS SQL Server DataServer
- Progress ODBC DataServer

The following component is required to process data warehouse tasks in parallel:

- Progress AppServer

Performance

The following suggestions are general recommendations that should boost performance in most implementations:

- The data warehouse database should be located on the same server as QAD BI Data Transformer.
- The Cognos PowerCubes should be generated on the same server as QAD BI Data Transformer.

- The network connections between the server hosting the Data Transformer and the MFG/PRO servers should be capable of supporting large data transfers efficiently.

Installation Media

The QAD BI software suite is packaged on multiple CDs. Depending on your purchase order, you may have received a CD to install QAD BI Data Transformer, a CD to install the common business model architecture components, as well as CDs to install each of the QAD BI business models.

The complete QAD BI suite includes the following media:

- QAD BI Data Transformer
- QAD BI Common Model components
- QAD BI Sales Analysis Model
- QAD BI Financial Controlling Model
- QAD BI Service Performance Model
- QAD BI Manufacturing Performance Model
- QAD BI Inventory Monitoring Model
- QAD BI Forecasting Model
- QAD BI Purchasing/Vendor Rating Model

Installation Steps

Installing QAD BI is a multi-step process. Each step is detailed in the following sections. Complete each step before moving on to the next. Each task is discussed in its own section:

- Verify the Prerequisite Components
- Set Up Language Support
- Prepare the DataDirect SequeLink Components
- Install the Cognos Components
- Install QAD BI Data Transformer Files
- Update the ODBC Account

- Install the Common Components and Business Models

Note QAD recommends you install QAD BI in a test environment first.

Verify the Prerequisite Components

Progress

QAD BI requires the Enterprise database components of Progress 9.1D or 9.1E. Use the Progress installation instructions to install the necessary components. Once they have been installed, verify that they are functioning properly by stopping and starting the Progress AdminService and connecting to the service using the Progress Explorer tool.

To stop and start the Progress AdminService:

- 1 Launch the Windows Services Manager (Start|Control Panel|Administrative Tools|Services).
- 2 Right-click AdminService for Progress and choose Stop.
- 3 Right-click AdminService for Progress and choose Start.

To connect to the service using the Progress Explorer tool:

- 1 Launch the Progress Explorer (All Programs|Progress|Progress Explorer).
- 2 Right-click the Progress Explorer node and choose Add Progress Server.
- 3 Choose OK to configure a local server.
- 4 Right-click the localhost node and choose Connect.

Important QAD recommends setting the Progress AdminService startup type to Manual. On some systems, Progress errors occur periodically when the service is set to Automatic. Anytime the server is rebooted, the service must be manually started.

Progress System Variables

Before you proceed with the QAD BI installation, you should:

- Verify that the DLC and PROMSGS system variables are set.
- Verify that the *ProgressInstallDir\bin* directory is in the system path variable.

Use these steps to verify the system variable and path information:

- 1 On your Windows Desktop, right-click My Computer and choose System Properties.
- 2 Click the Advanced tab and choose Environment Variables.
- 3 Verify that DLC and PROMSGS are set. If they are not, click New and enter the variable name and value to set the missing variables:

DLC=ProgressInstallDir

PROMSGS=ProgressInstallDir\promsgs

- 4 Double-click the Path system variable. Review the value to make sure the *ProgressInstallDir\bin* directory is included. If it is not included, add it to the end of the path, delimited by a semicolon (;).

Microsoft Access

QAD BI has been tested to ensure that it interacts seamlessly with Microsoft Access 2000 and newer releases. It has not been tested with previous releases. Before you proceed with the QAD BI installation, perform the following system checks:

- Verify the Access version compatibility.
- Set the Macro/Security option to low when using Access 2003.

To verify the version compatibility:

- 1 Launch Access.
- 2 Choose Help|About Access.
- 3 Verify that you have Microsoft Access 2000 or above.
- 4 Click OK to return to the application.

To set the Macro/Security level to low when using Microsoft Access 2003:

- 1 From the Tools menu, choose Macros|Security.
- 2 Set Security to Low.

SMTP Mail Server Account

A valid SMTP (outgoing) mail server account is required when configuring Cognos Server. The account will be used to send reports by e-mail.

Make sure you know the following information:

- Host name and port of your SMTP mail server
- Account and password for the SMTP mail server

Set Up Language Support

To support different languages, you must set special language encoding and fonts in the Windows operating system:

- 1 To set language encoding, choose Start|Control Panel|Regional and Language Options|Advanced.

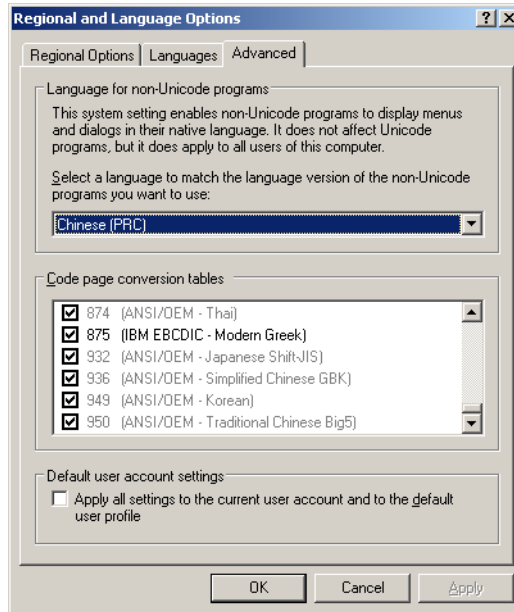


Fig. 3.2
Regional and
Language Options

- 2 From the Language for non-Unicode programs frame, choose the language you require.
- 3 From the Code page conversion tables frame, select the code page conversion tables you require.

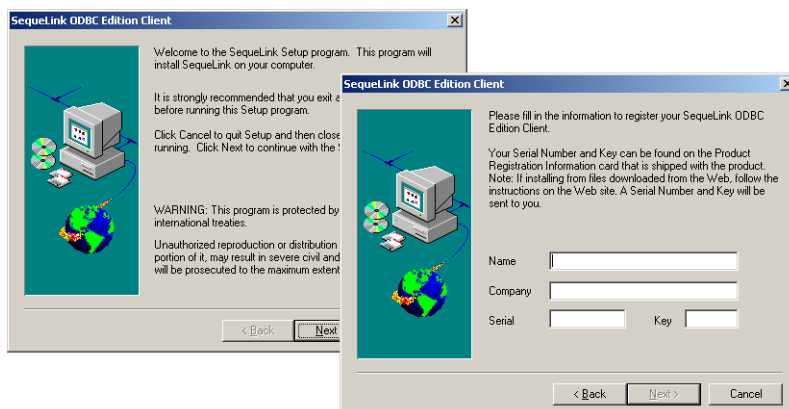
Prepare the DataDirect SequeLink Components

Use the following steps to install and configure the DataDirect SequeLink components. These components are provided on QAD BI Data Transformer installation CD in the `\et1-progress9\sequelink` subdirectory.

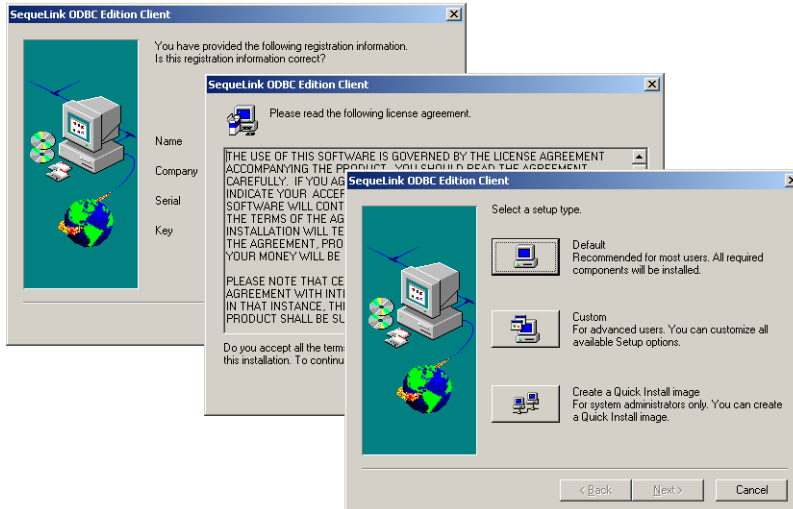
Note The DataDirect ODBC Edition Client and the DataDirect SequeLink Server software are licensed for use with QAD BI only.

Install the DataDirect ODBC Edition Client

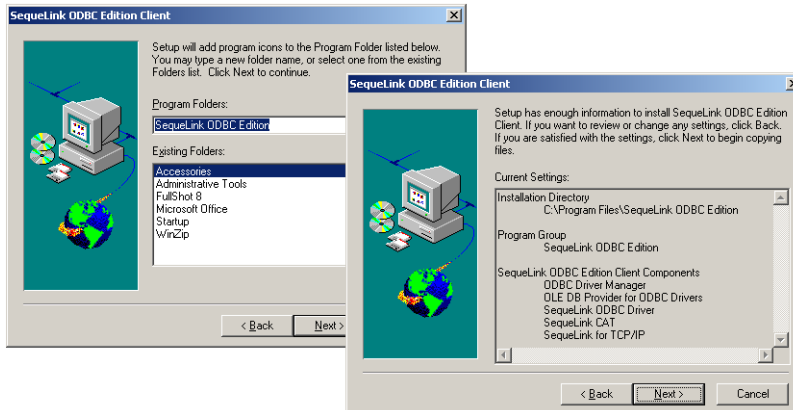
- 1 Start the DataDirect ODBC client installation by running the `\etl-progress9\sequelink\client\setup.exe` installation program.
- 2 Review the client information, and enter your product registration information.



- 3 Review your registration information and license agreement, and then choose the Default installation.



- 4 Choose a folder where to place the program icons, review the installation configuration, and begin the installation process.

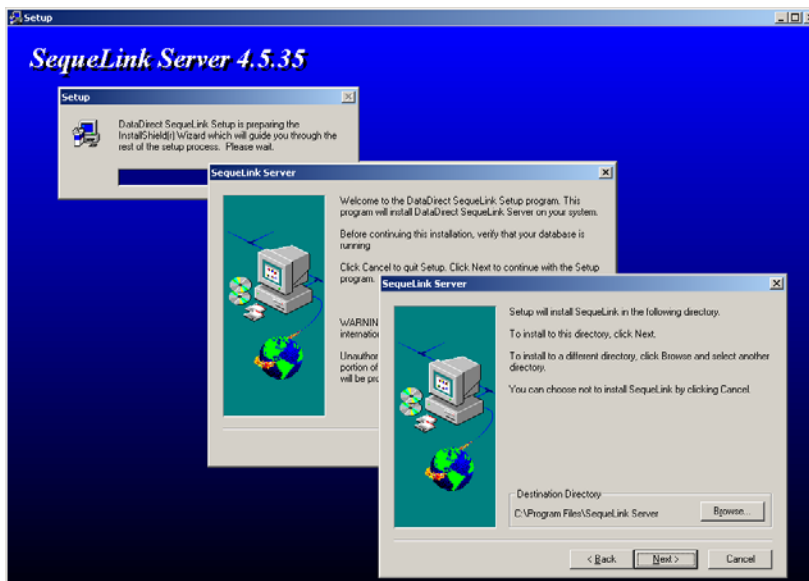


Install the DataDirect SequeLink Server

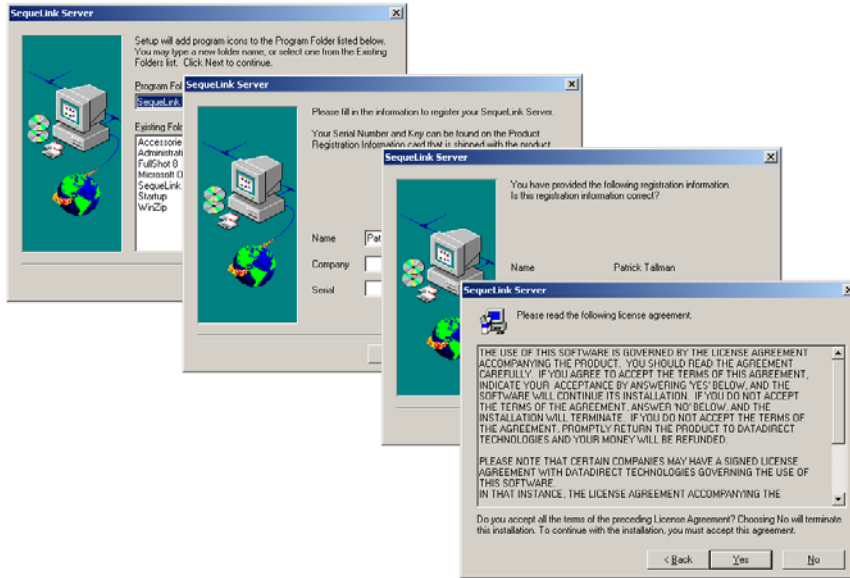
Use these steps to install the DataDirect SequeLink Server:

- 1 Start the SequeLink Server installation by running the `setup.exe` installation program found in:

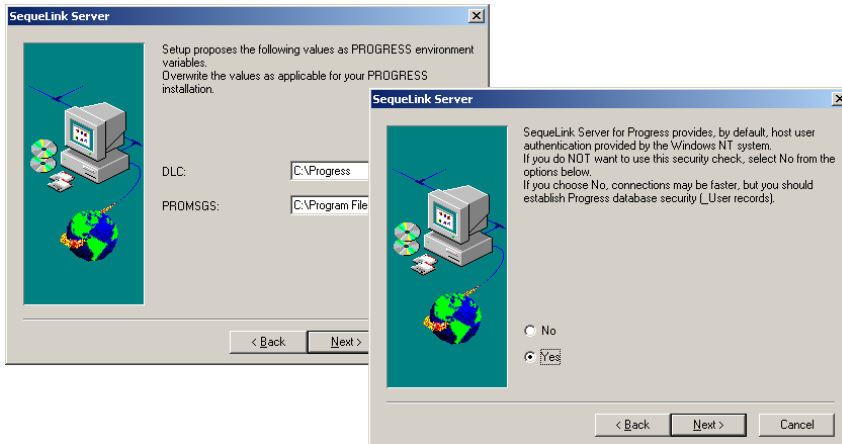
```
\etl-progress9\sequelink\server\
```
- 2 Review the product information and verify the installation directory. If a previous installation of the product is detected, you should install into the same directory as the previous installation.



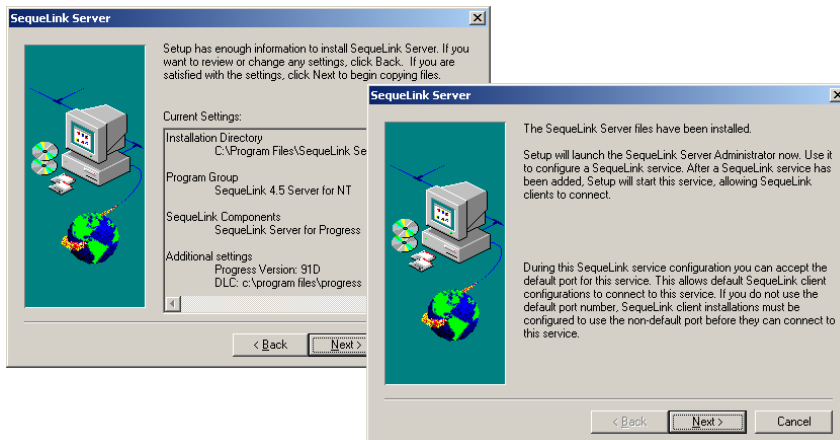
- 3 Choose the program group to create, enter and verify your registration information, and review the license agreement.



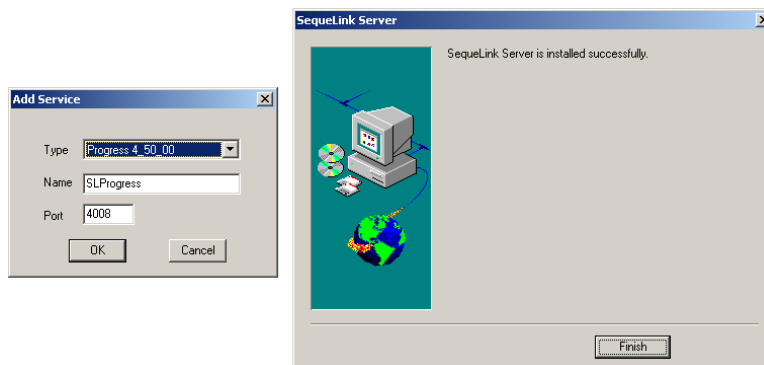
4 When prompted, enter the Progress directory information as required.



- 5 Review the components to be installed, and proceed with the installation. Once the files are installed successfully, you are notified that the SequeLink Server Administrator will be launched to add a SequeLink service.



- 6 When the SequeLink Server Administrator displays, accept the default configuration. Once the service is added, the SequeLink Server installation is complete.



- 7 Configure the SequeLink OCBC Driver to support Progress 9.1D or Progress 9.1E.

- a From SequeLink Server Administrator, choose the Load Config button to open the configuration. For further details, read `version.txt` under the following directory:

`SequeLinkServerInstallDir\4_50_00\bin`

- b Depending on which Progress version you are using, enter the relevant configuration details as shown in Figure 1.3 and Figure 1.4.

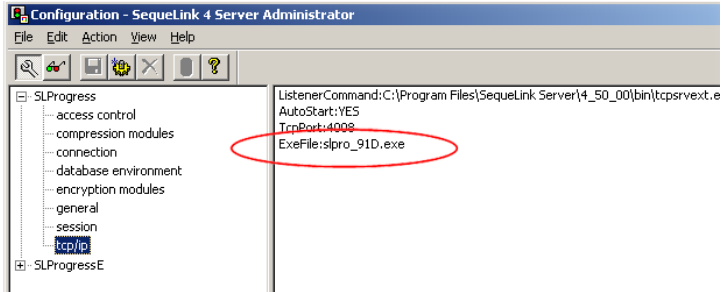


Fig. 3.3
Configuration for
Progress 9.1D

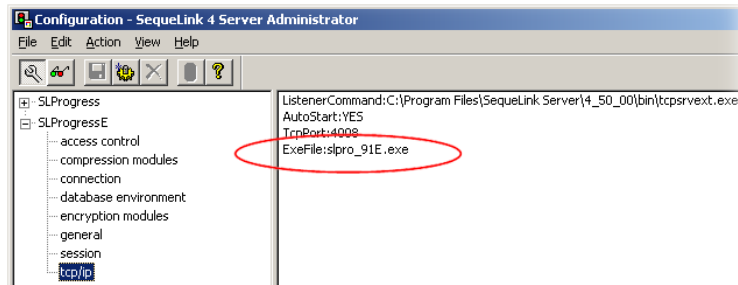


Fig. 3.4
Configuration for
Progress 9.1E

Install the Cognos Components

The installation steps described here assume that you are installing all Cognos 8 components on one computer. For other Cognos 8 installation options, see Chapter 7, “Installation Options,” in the *Cognos 8 Architecture and Planning Guide*.

Use the steps in this section to install and configure:

- Cognos PowerPlay Transformer
- Cognos Server
- Cognos Framework Manager

Install and Configure Cognos PowerPlay Transformer

Installing Cognos PowerPlay Transformer

- 1 Insert the Cognos BI Transformer 7.3 MR2 CD.
- 2 Select Install PowerPlay Transformer Edition for Windows.
- 3 Select all default options unless using a double-byte language.
If you need to use a double-byte language in BI, at the Character Set Selection screen, select Locales for other languages.
- 4 On the Component Configuration screen, select the following option button:

```
Exit the Installation Wizard without configuring
components. You must later configure the components to
complete the installation.
```
- 5 Click Next.
- 6 On the Finish screen, click Finish.
- 7 In the Cognos 8 Business Intelligence OLAP Modelling 8.2 Windows screen, click Exit.

Applying the Current Configuration

- 1 From the Windows Start menu, choose All Programs|Cognos 8|Tools|Configuration Manager.
- 2 On the Cognos Configuration Manager Welcome screen, choose the Open the current configuration option under the Start tab.
- 3 In the Configuration Manager Explorer panel, right-click the top-level node that has your computer name and choose Apply Selection.
- 4 Click Yes at the prompt for confirmation.
- 5 The Configuration Manager application progress bar displays. When the application process is complete, click OK and exit Configuration Manager.

Note When the following warning message displays, ignore it and choose OK:

```
Warning: Could not complete Apply for
YourComputerName.
```

Install and Configure Cognos 8 Server

Installing Cognos 8 Server

- 1 Launch the Cognos 8 Server installation program (`win32\issetup.exe`) from the Cognos 8 Analysis User (Web Client NU) CD.
- 2 Select all default options unless using a double-byte language.
If you need to use a double-byte language in BI, at the Character Set Selection screen, select Locales for other languages.
- 3 Select Cognos Content Database in the installation wizard.
- 4 On the Finish screen, click Finish.

Creating the Content Store

The content store is a database that Cognos Content Manager uses to store global configuration data, global settings (such as the language and currency formats shown in the user interface), connections to data sources, and product-specific content. Design models and log files are not stored in the content store.

By default, Cognos 8 products share the content store database.

Use Cognos content database as the content store database. For details on how to configure the content store in Cognos Configuration, see *Cognos 8 Installation and Configuration Guide*.

Installing HTTP Server

To access Cognos 8 interfaces through the Cognos 8 Web portal, you must install and configure an HTTP server to host Cognos 8 Server files and components.

Use Microsoft Internet Information Services on Windows 2000 or Windows XP; use Application Server on Windows 2003.

- 1 From the Windows Start menu, choose Control Panel|Add or Remove Programs.
- 2 In the left pane, click Add/Remove Windows Components.
- 3 On the Windows Components Wizard screen, check one of the following:
 - Internet Information Services (IIS) box when the target machine is running Windows 2000 or Windows XP
 - Application Server when the target machine is running Windows 2003
- 4 Click Next.
- 5 Accept the default options to complete the installation unless you are using IIS 6.0.

If you use IIS 6.0, ensure that the CGI extension can be executed by doing this:

- a Go to your IIS 6.0 control panel.
- b Select Web Service Extensions from the left tree.
- c Select All Unknown CGI Extensions and click Allow.
- d When prompted to confirm, click Yes.

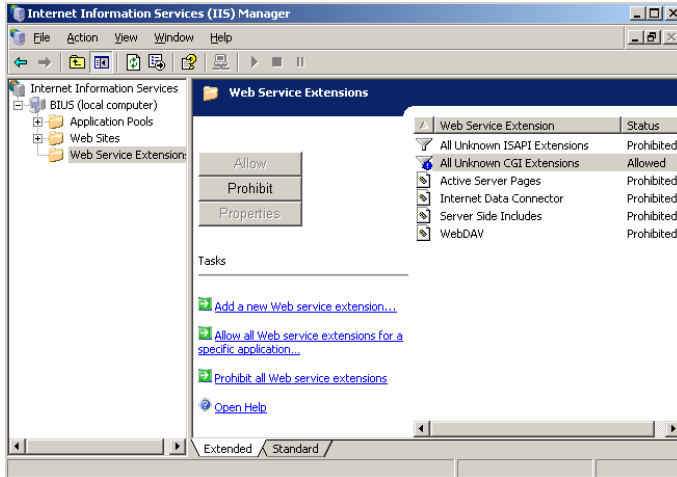


Fig. 3.5
Internet
Information
Services Manager

Configuring HTTP Server

Before you use Web pages generated by Cognos 8, you must configure your Web server. You must set up virtual directories, also known as Web aliases, for the directories that contain the HTML and Web files for Cognos 8.

| Alias | Location | Permission |
|-----------------|--|-------------------------------|
| cognos8 | <i>CognosSvrInstallDir</i> \webcontent | Read, Run-scripts |
| cognos8/cgi-bin | <i>CognosSvrInstallDir</i> \cgi-bin | Read, Run-scripts, Execute |
| cognos8/help | <i>CognosSvrInstallDir</i> \webcontent\ documentation | Read, Run-scripts |

Note *CognosSvrInstallDir* is the directory where you installed Cognos 8 Server.

Use these steps to configure Internet Information Server:

- 1 In the left pane of the Internet Information Services Manager window, expand the folder that has your computer name and then expand the Web Site folder.
- 2 Right-click the folder that contains the Web site where you will run your Cognos product and choose New|Virtual Directory. If you have only one Web site, its default name is Default Web Site.

- 3 In the Virtual Directory Creation Wizard dialog box, click Next.
- 4 In the Alias text box, enter `cognos8`, and then click Next.
- 5 Click Browse, select the `CognosSvrInstallDir\webcontent` folder, and then click Next.
- 6 Ensure that the Read and Run-scripts check boxes are selected, and then click Next.
- 7 Click Finish.
- 8 In the left pane of Internet Information Services Manager, right-click the `Cognos8` folder you just created and choose New|Virtual Directory.
- 9 In the Virtual Directory Creation Wizard dialog box, click Next.
- 10 In the Alias text box, enter `cgi-bin`, and then click Next.
- 11 Click Browse, select the `CognosSvrInstallDir\cgi-bin` folder, and then click Next.
- 12 Ensure that the Read, Run-scripts, and Execute check boxes are selected, and then click Next.
- 13 Click Finish.
- 14 In the left pane of Internet Information Services Manager, right-click the `Cognos8` folder and choose New|Virtual Directory.
- 15 In the Virtual Directory Creation Wizard dialog box, click Next.
- 16 In the Alias text box, enter `help`, and then click Next.
- 17 Click Browse, select the following folder, and then click Next:
`CognosSvrInstallDir\webcontent\documentation`
- 18 Ensure that the Read and Run-scripts check boxes are selected, and then click Next.
- 19 Click Finish.
- 20 The HTTP server is configured. Exit IIS Manager.

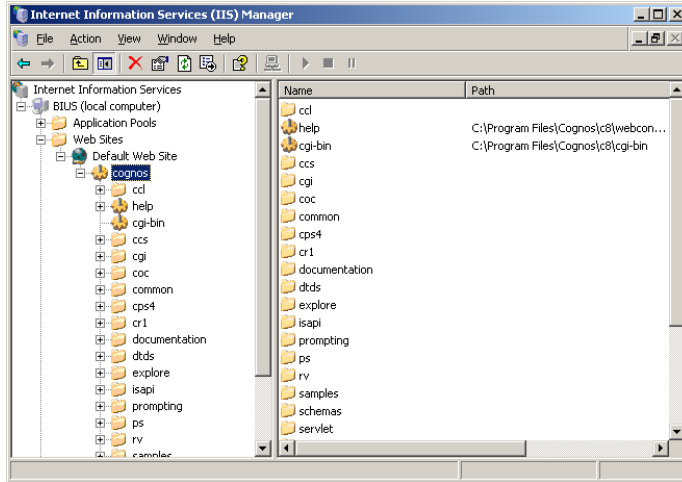


Fig. 3.6
Configure Internet Information Services

Configuring Web Browsers

Cognos 8 uses the default browser configurations provided by Microsoft, Netscape, and Firefox. For all browsers, you must ensure that settings are enabled for cookies and Java scripts. Additional required settings are specific to the browser.

| Browser | Setting | Cognos Component |
|-------------------|--|-------------------|
| Internet Explorer | Run ActiveX controls and plug-ins Script ActiveX controls marked safe for scripting | Analysis Studio |
| Netscape | Allow Cookies JavaScript | Cognos Connection |
| Firefox | Allow Cookies Enable Java Enable JavaScript Load Images | Cognos Connection |

Table 3.1
Web Browser Settings

Configuring Cognos 8 Server Components

After you install the Cognos 8 Server components, the following configuration tasks are required.

Specifying a Mail Server Account

If you want to send reports by e-mail, you must configure a mail server account.

- 1 In the Cognos Configuration Explorer window, under Data Access, click Notification.
- 2 In the Properties window, for the SMTP mail server property, enter the host name and port of your SMTP (outgoing) mail server.
- 3 Click the Value box next to the Account and password property and then click the edit button when it appears.
- 4 Enter the appropriate values in the Value – Account and password dialog box and then click OK.

Note If log-on credentials are not required for the SMTP server, remove the default information for the Account and password property. When you are prompted for confirmation to leave this property blank, click Yes. Ensure that the default user name has been removed. Otherwise, the default account is used and notifications will not work properly.

- 5 In the Properties window, enter the appropriate value for the default sender account.
- 6 Right-click Notification in the Explorer window and choose Test to test the mail server connection.
- 7 On the File menu, click Save.

Testing the Server Components

You can test your configuration settings by running the test feature before you start the Cognos 8 service. Then you can test the installation by starting the Cognos 8 service and then opening Cognos Connection. On Windows, the Cognos 8 service is configured to start automatically by default.

- 1 Start Cognos Configuration.
- 2 Ensure that you save your configuration; otherwise, you will not be able to start the Cognos 8 service.

- 3** In the Explorer window, click Local Configuration.
- 4** On the Actions menu, click Test.
Cognos Configuration checks the CSK availability; tests the namespace configuration; and tests the connections to the content store, logging database, notification database, and mail server.
- 5** If any test fails, reconfigure the affected properties and then test again. Do not start the service until all tests pass.
- 6** On the Actions menu, click Start.
It may take a few minutes for the Cognos 8 service to start. This action starts all installed services that are not running. If you want to start a particular service, select the service node in the Explorer window and then click Start on the Actions menu.
- 7** Open a Web browser.
- 8** Enter the following in the address bar and press Enter, where `cognos8` is the virtual directory you created when you configured the Web server:

`http://host_name:port/cognos8`
- 9** It may take a few minutes for the Web page to open. If you see the Welcome page of Cognos Connection, your Cognos 8 installation is working.

Install and Configure Cognos Framework Manager

You must install and configure Cognos Framework Manager before you can use Cognos 8 for analysis.

Use these steps to install Cognos Framework Manager:

- 1** Launch the Cognos Framework Manager installation program from the Cognos 8.2 OLAP Modeling / PowerPlay Administrator CD.
- 2** Select all default options.
- 3** Select Framework Manager in the Component Selection screen.

4 Click Yes at the following prompts:

Warning: You are installing to the same location as a previous installation. Do you want to continue?

This installation will replace existing files.
Select Yes to automatically create a backup of all files that are replaced.

5 On the Finish screen, click Finish.

Install QAD BI Data Transformer Files

This section includes the information you need to install QAD BI Data Transformer program and data files using QAD BI Data Transformer installation CD.

To begin the installation of the Data Transformer, launch `install.bat` from the `etl-progress9` directory on the installation CD. You are then prompted to provide several installation parameters. Use the following descriptions as a guide.

Note The values you provide are saved in the system registry and are used as defaults on subsequent QAD BI installations.

Important If you specify a Program Files directory where QAD BI Data Transformer was previously installed, you are prompted either to upgrade or to replace the existing installation.

- Choosing to upgrade the existing installation updates the QAD BI program files to the installed version while retaining the existing data warehouse configuration and data.
- Choosing to replace the existing installation completely replaces all program and data files.

Support Multiple Code Page Data Sources. Indicate whether the product needs to connect to double-byte language source databases and English source databases at same time. Enter either Y for yes or N for no.

Default Encoding. Specify the default encoding used by the Data Transformer. ISO8859-1 is the code page for Western languages. The code pages for supported double-byte languages are:

GB2312: Simplified Chinese

CP936: Extended Simplified Chinese GBK

CP950: Traditional Chinese Big-5

CP949: Korean

SHIFT-JIS: Japanese

Program Files Directory. Specify the directory where program files will be installed. The directory name should not contain spaces.

Data Directory. Specify the directory where the data warehouse and administration databases will be installed. The directory name should not contain spaces.

Progress Directory. Specify the directory where Progress was installed.

Data Warehouse Database Name. Specify the name assigned to the data warehouse database in the Progress Explorer tool.

Data Warehouse Database Port. Specify the TCP-IP port to use for the data warehouse database server in the Progress Explorer tool.

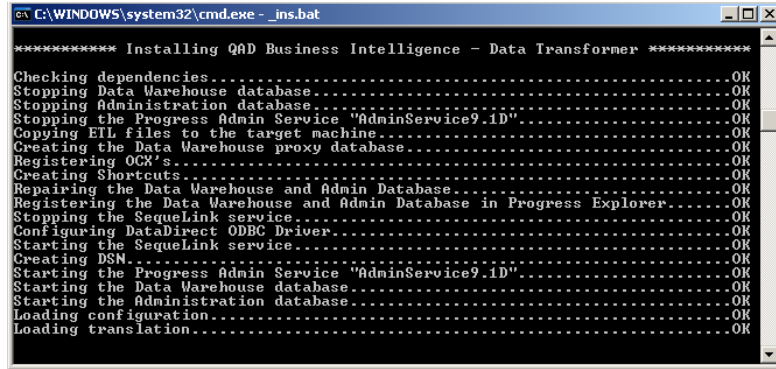
Administration Database Name. Specify the name assigned to the Administration database in the Progress Explorer tool.

Administration Database Port. Specify the TCP-IP port to use for the Administration database server in the Progress Explorer tool.

Program Group. Specify the name of a program group where application shortcuts will be installed.

After you enter the required installation parameters, several automated tasks execute and a status screen displays.

Fig. 3.7
QAD BI Data
Transformer
Installation Status
Screen



```

C:\WINDOWS\system32\cmd.exe - _ins.bat
***** Installing QAD Business Intelligence - Data Transformer *****
Checking dependencies.....OK
Stopping Data Warehouse database.....OK
Stopping Administration database.....OK
Stopping the Progress Admin Service "AdminService9.ID".....OK
Copying ETL files to the target machine.....OK
Creating the Data Warehouse proxy database.....OK
Registering OCK's.....OK
Creating Shortcuts.....OK
Repairing the Data Warehouse and Admin Database.....OK
Registering the Data Warehouse and Admin Database in Progress Explorer.....OK
Stopping the Sequelink service.....OK
Configuring DataDirect ODBC Driver.....OK
Starting the Sequelink service.....OK
Creating DSN.....OK
Starting the Progress Admin Service "AdminService9.ID".....OK
Starting the Data Warehouse database.....OK
Starting the Administration database.....OK
Loading configuration.....OK
Loading translation.....OK
  
```

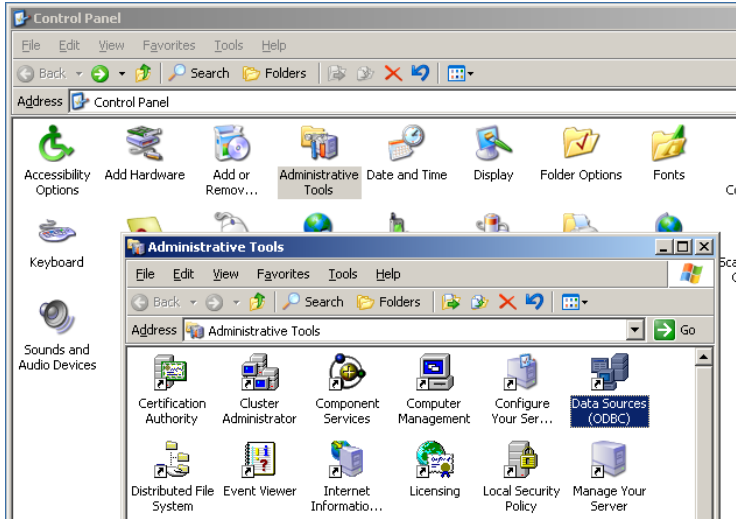
After the installation script completes, exit the DOS screen.

Update the ODBC Account

An ODBC Data Source Name (DSN) was created by the installation using the Data Warehouse Database Name installation parameter. The DSN must be configured to use a Windows account with Administrative rights.

To set the account, follow these steps, which assume that you are using Windows XP Professional; other operating systems may require slightly different steps.

- 1 Access the ODBC Administrator by selecting Start|Control Panel|Administrative Tools|Data Sources (ODBC).



- 2 The ODBC Data Source Administrator displays. Choose the System DSN tab; then select the appropriate DSN and click Configure.

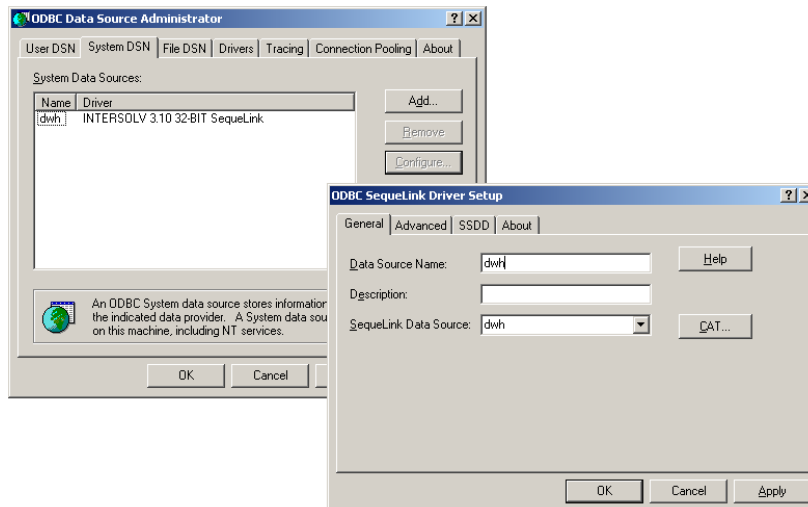
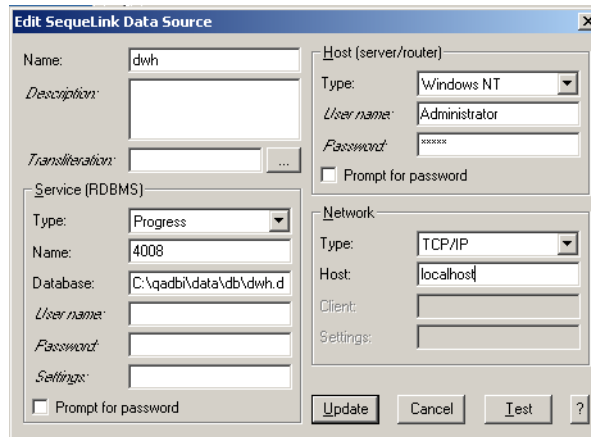


Fig. 3.8
ODBC SequeLink
Driver Setup

- 3 Click CAT on the ODBC SequeLink Driver Setup screen. The Edit SequeLink Data Source screen displays. In the Host panel, enter authentication information for a Windows account with Administrative privileges, and clear the Prompt for Password check box.

Fig. 3.9
Edit SequeLink
Data Source



- 4 Click Test to make sure the account and password information is valid.
- 5 Click Update to save your changes and return to the previous screen. Exit each screen, confirming your changes, until you are returned to your desktop.

Note You must do this task before you run the BI Data Transformer.

Install the Common Components and Business Models

Your QAD BI package may include several business model CDs. This section includes information to help you install the common model components and the business models. The same steps are used to install each of these components. You can install the business model CDs in any order once the common model components have been installed.

To begin the installation, launch `install.bat` from the selected CD.

You are then prompted to provide several installation parameters. Use the following descriptions as a guide.

Note The values you provide are saved in the system registry and are used as defaults on subsequent QAD BI installations.

Program Files Directory. Specify the directory where program files will be installed. The directory name should not contain spaces.

Data Directory. Specify the directory where the business models will be installed. The directory name should not contain spaces.

See *User Guide: QAD Business Intelligence* for information on how to load the business model data.



Chapter 4

Upgrading QAD BI, Progress 9 Edition

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Install the New Data Transformer Files **70**

Convert the DWH Database **70**

Overview

If you are upgrading QAD BI to release 2.5 from a release prior to 2.3.2, you must upgrade to QAD BI 2.3.2 first. For details on upgrading to QAD BI 2.3.2, see *QAD Business Intelligence 2.3.2 Technical Reference Guide*.

Upgrade Summary

For all previous releases, you must

To upgrade QAD Business Intelligence from version 2.3.2 to 2.5, you must complete the following steps:

- Install the new QAD BI Data Transformer files
- Convert the DWH database

Prior to Upgrading

Make sure you back up your data warehouse prior to upgrading QAD BI.

Install the New Data Transformer Files

See “Installation Steps” on page 43 for detailed information on installing the new QAD BI Data Transformer program and data files.

Convert the DWH Database

Use the following steps to convert the old DWH database.

- 1 Edit the `DWH_Repl_To_BI25.pf` file located in the `qadbiinstall\dir\data\utilities\dwh_conv` directory to connect to both the old QAD BI 2.3.2 DWH database and the new QAD BI 2.5 empty DWH database.

Use the following as an example:

```
# QAD BI 2.3.2 DWH Database
-db dwh.db -H juy-sh-pc2 -S 30000 -ld sdwh -U dwh -P admin
# QAD BI 2.5 DWH Database
-db dwh.db -H localhost -S 24000 -ld tdwh -U dwh -P admin
-cpinternal UTF-8 -cpstream UTF-8
```

- 2 In the Command Prompt window, run `Start_DWH_Repl_To_BI25.p` from the `qadbiinstalldir\data\utilities\dwh_conv` directory to replicate data from the old QAD BI 2.3.2 DWH database to the new QAD BI 2.5 DWH database:

```
prowin32 -p Start_DWH_Repl_To_BI25.p -pf DWH_Repl_To_BI25.pf
```


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