

Oracle® Argus Insight

Installation Guide

Release 8.0

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Oracle Argus Insight Installation Guide, Release 8.0

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Preface

This *Oracle Argus Insight Installation Guide* describes installing — or upgrading to — Argus Insight 8.0. You perform some of these tasks once. Other tasks you repeat as your system and business requirements change.

This preface includes the following topics:

- [Audience](#)
- [Documentation Accessibility](#)
- [Finding Information and Patches on My Oracle Support](#)
- [Finding Oracle Documentation](#)
- [Conventions](#)

Audience

This document is intended for all Argus Insight administrators who are responsible for installing and maintaining the Argus Insight application.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit
<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit
<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Finding Information and Patches on My Oracle Support

Your source for the latest information about Argus Insight is Oracle Support's self-service website My Oracle Support.

Before you install and use Argus Insight, always visit the My Oracle Support website for the latest information, including alerts, White Papers, and bulletins.

Creating a My Oracle Support Account

You must register at My Oracle Support to obtain a user name and password account before you can enter the website.

To register for My Oracle Support:

1. Open a web browser to <https://support.oracle.com>.
2. Click the **Register** link to create a My Oracle Support account. The registration page opens.
3. Follow the instructions on the registration page.

Signing In to My Oracle Support

To sign in to My Oracle Support:

1. Open a web browser to <https://support.oracle.com>.
2. Click **Sign In**.
3. Enter your user name and password.
4. Click **Go** to open the My Oracle Support home page.

Finding Information on My Oracle Support

There are many ways to find information on My Oracle Support.

Searching by Article ID

The fastest way to search for information, including alerts, White Papers, and bulletins is by the article ID number, if you know it.

To search by article ID:

1. Sign in to My Oracle Support at <https://support.oracle.com>.
2. Locate the Search box in the upper right corner of the My Oracle Support page.
3. Click the sources icon to the left of the search box, and then select **Article ID** from the list.
4. Enter the article ID number in the text box.
5. Click the magnifying glass icon to the right of the search box (or press the Enter key) to execute your search.

The Knowledge page displays the results of your search. If the article is found, click the link to view the abstract, text, attachments, and related products.

Searching by Product and Topic

You can use the following My Oracle Support tools to browse and search the knowledge base:

- **Product Focus** — On the Knowledge page under Select Product, type part of the product name and the system immediately filters the product list by the letters you have typed. (You do not need to type "Oracle.") Select the product you want from the filtered list and then use other search or browse tools to find the information you need.
- **Advanced Search** — You can specify one or more search criteria, such as source, exact phrase, and related product, to find information. This option is available from the **Advanced** link on almost all pages.

Finding Patches on My Oracle Support

Be sure to check My Oracle Support for the latest patches, if any, for your product. You can search for patches by patch ID or number, or by product or family.

To locate and download a patch:

1. Sign in to My Oracle Support at <https://support.oracle.com>.
2. Click the **Patches & Updates** tab. The Patches & Updates page opens and displays the Patch Search region. You have the following options:
 - In the **Patch ID or Number** field, enter the number of the patch you want. (This number is the same as the primary bug number fixed by the patch.) This option is useful if you already know the patch number.
 - To find a patch by product name, release, and platform, click the **Product or Family** link to enter one or more search criteria.
3. Click **Search** to execute your query. The Patch Search Results page opens.
4. Click the patch ID number. The system displays details about the patch. In addition, you can view the Read Me file before downloading the patch.
5. Click **Download**. Follow the instructions on the screen to download, save, and install the patch files.

Finding Oracle Documentation

The Oracle website contains links to all Oracle user and reference documentation. You can view or download a single document or an entire product library.

Finding Oracle Health Sciences Documentation

To get user documentation for Oracle Health Sciences applications, go to the Oracle Health Sciences documentation page at:

<http://www.oracle.com/technetwork/documentation/hsgbu-154445.html>

Note: Always check the Oracle Health Sciences Documentation page to ensure you have the latest updates to the documentation.

Finding Other Oracle Documentation

To get user documentation for other Oracle products:

1. Go to the following web page:

<http://www.oracle.com/technology/documentation/index.html>

Alternatively, you can go to <http://www.oracle.com>, point to the Support tab, and then click **Documentation**.

2. Scroll to the product you need and click the link.
3. Click the link for the documentation you need.

Conventions

The following text conventions are used in this document:

| Convention | Meaning |
|-----------------|--|
| boldface | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |
| <i>italic</i> | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values. |
| monospace | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |

Introduction

Argus Insight is a highly optimized reporting module for querying, case series management and reporting that compliments Argus Safety.

The Argus Insight Extract Transform and Load (ETL) engine extracts data from the Argus Safety database and populates Argus Insight data mart in a format to enable efficient querying. The query, drill-down, and output features of Argus Insight let you analyze your safety data from a scientific angle and produce queries, case series and reports that provide medical and scientific understanding of your aggregated adverse event information.

Argus Insight also supports Argus Mart as an additional data source. If you are using Argus Mart as a data source in a multi-tenant environment, then you may create Argus Mart Advanced Condition that queries Argus Mart database.

This chapter includes the following topics:

- [Argus Insight Product Overview](#)
- [Software and Hardware Requirements](#)
- [Important Installation Information](#)

Note: **Power Reports** has been renamed **Argus Insight** and the two terms have been used interchangeably in this document.

1.1 Argus Insight Product Overview

In Argus Insight, you can generate a report through a query. The query retrieves a set of specific type of cases (*Case Series*) from the data mart (Insight Mart/Argus Mart) and then runs the report on only those cases.

Use these Argus Insight components to retrieve the Case Series: *Query By Example (QBE)*, *Filters*, and *Advanced Conditions*. Next, run one of these reports on the Case Series: the built-in *Standard Reports* or the custom reports.

The following flowchart shows the typical workflow for generating a report.

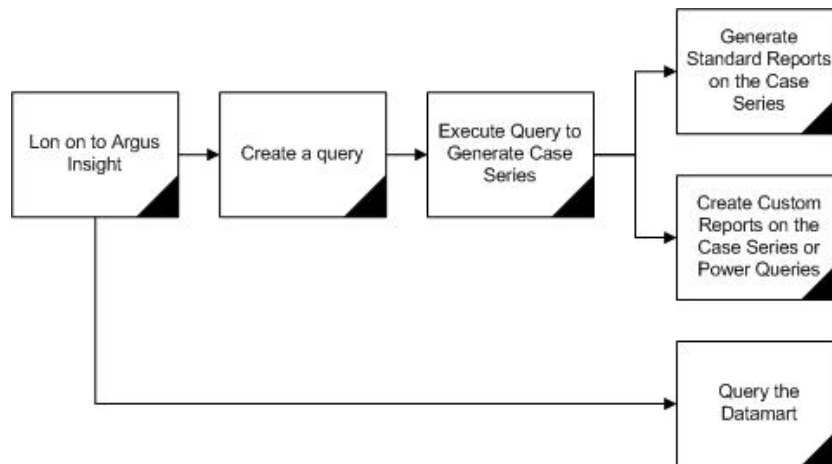


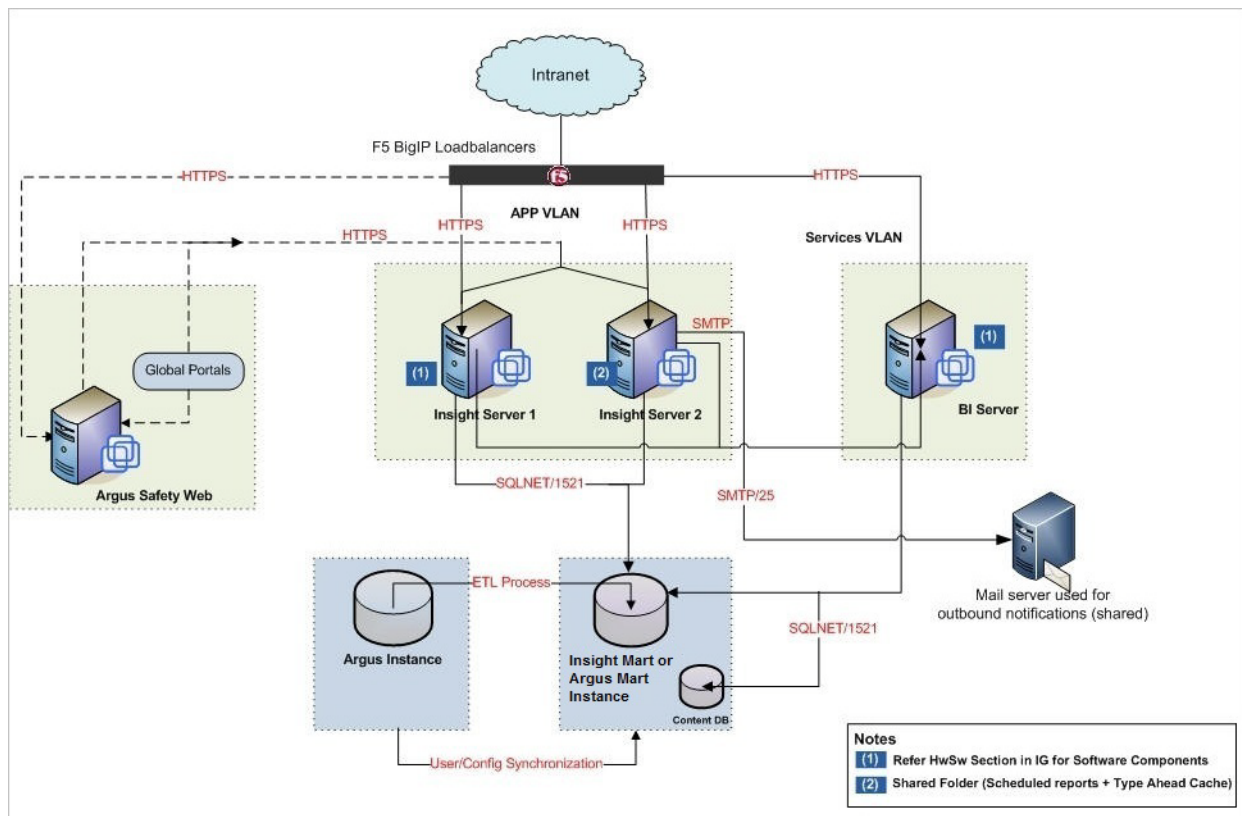
Table 1–1 describes the various features of Argus Insight:

Table 1–1 Argus Insight Features

| Features | Description |
|------------------------|---|
| Query by Example (QBE) | Lets you create simple queries by entering specific values in fields on a form that looks substantially like the Argus Safety case form. |
| Filters | Lets you create queries by selecting a set of predefined fields and specifying multiple values in a field. |
| Advanced Conditions | Lets you create complex queries by selecting any of the various different fields in the data mart (Insight Mart/Argus Mart) and applying Boolean and Set operations on them. You may use Advanced Conditions to query data on Argus Mart. |
| Case Series | A list of cases that match the query criteria with revisions (applicable only for Argus Mart). |
| Standard Reports | Predefined reports built into Argus Insight. These reports are grouped into the General category. Typically, these reports are run on the Case Series. |

1.1.1 Argus Insight Architecture

The following figure illustrates the Argus Insight architecture:



1.2 Software and Hardware Requirements

Table 1–2 lists the software and hardware requirements for the following components in an Argus Insight installation:

- Argus Insight Web Server
- Database Server
- BI Publisher, BusinessObjects Server, Cognos, or OBIEE (depending on which Business Intelligence tool you are using with Argus Insight)

Note: Argus Insight can be used together with a reporting tool, which can be BI Publisher, BusinessObjects, Cognos, OBIEE, or any combination of these.

- Argus Insight Client

Table 1–2 Argus Insight Software and Hardware Requirements

| Component | Requirements |
|--------------------------|--|
| Argus Insight Web Server | <p>Supported Operating Systems:</p> <ul style="list-style-type: none">■ Windows Server 2012 Standard■ Windows Server 2012 R2 Standard■ Windows 2008 R2 SP1 Standard/Enterprise (64 bit) <p>Note: Make sure that you install the English versions of these operating systems.</p> <p>Oracle Database Software:</p> <ul style="list-style-type: none">■ Oracle Client 11.2.0.4 (32 bit) (with SQL Plus, SQL Loader, Oracle and OLEDB Objects)■ Oracle Data Provider 11.2.0.4 for .Net■ Oracle Client 12c R1 (12.1) (32 bit)■ Oracle Data Provider 12c R1 (12.1) for .Net <p>Hardware Requirements:</p> <ul style="list-style-type: none">■ Up to 5000 cases in the system: 2x2.6 GHz processors, 4 GB memory■ More than 5000 cases in the system: 4x2 GHz processors, 8 GB memory <p>Additional Software Requirements:</p> <ul style="list-style-type: none">■ Dotnet Framework 3.5 Service Pack 1■ IIS 7.5 (IIS 6.0 compatibility pack should also be installed)■ IIS 8.5■ Microsoft Internet Explorer 9.0 (32 bit, latest version), or 10.0 (32 bit)■ Microsoft Visual C++ 2010 SP1 Redistributable■ MSXML 6.0■ Oracle Access Manager 11.1.1.7 (optional)■ Webgate 10.1.4.3 (optional) <p>Note: The Argus Insight Web Server should be configured for Simple Mail Transfer Protocol (SMTP) for email support.</p> |

Table 1–2 (Cont.) Argus Insight Software and Hardware Requirements

| Component | Requirements |
|-----------------|---|
| Database Server | <p>Supported Operating Systems:</p> <ul style="list-style-type: none"> ■ Oracle Enterprise Linux X86 (Version: 5.5.0.0.0 and 5.7.0.0) ■ Oracle Enterprise Linux X86-64 (Version: 5.5.0.0.0 and 5.7.0.0) ■ Solaris 10 ■ Solaris 11 ■ Oracle Enterprise Linux 6.1 UEK ■ Oracle Enterprise Linux 6.2 UEK ■ Oracle Enterprise Linux 6.4 UEK ■ Windows Server 2012 Standard ■ Windows Server 2012 R2 Standard ■ Windows 2008 R2 SP1 Enterprise (64 bit) ■ Windows 2008 R2 SP1 Standard (64 bit) <p>Note: Make sure that you install the English versions of these operating systems.</p> <p>Oracle Database Software:</p> <ul style="list-style-type: none"> ■ Oracle Database Server (Standard/Enterprise - AL32UTF8 character set) - Version 11.2.0.4 (32/64 bit) <p>Oracle Advanced Security Transparent Data Encryption* (Optional)</p> <p>Oracle Advanced Security Network Encryption (Optional)</p> <p>*Note: Oracle Database TDE feature is part of the Oracle Advanced Security option available for Oracle Database Enterprise Edition 11g (http://www.oracle.com/technetwork/database/options/advanced-security/index.html).</p> <p>TDE provides the capability to encrypt sensitive data in the Oracle Database in a manner that is transparent to applications.</p> <p>Argus Insight product has been functionally certified with tablespace level encryption using the Oracle Database TDE feature.</p> <ul style="list-style-type: none"> ■ Oracle Database Server (Standard/Enterprise) 12c R1 (12.1) ■ Oracle RAC 11g R2 ■ Exadata 11g R2 <p>Note: Oracle database standard edition is supported for single tenant deployment only.</p> <p>Hardware Requirements:</p> <ul style="list-style-type: none"> ■ Up to 5000 cases in the system: 2x2 GHz processors, 4 GB memory ■ More than 5000 cases in the system: 4x2 GHz processors, 16 GB memory |

Table 1–2 (Cont.) Argus Insight Software and Hardware Requirements

| Component | Requirements |
|-------------------------------|--|
| BI Publisher (BIP) | <p data-bbox="428 260 764 283">Supported Operating Systems:</p> <ul data-bbox="428 300 906 684" style="list-style-type: none"> ■ Oracle Virtual Machine 2.2.1 ■ Oracle Virtual Machine 2.2.2 ■ Solaris 10 ■ Solaris 11 ■ Oracle Enterprise Linux 6.2 UEK ■ Oracle Enterprise Linux 6.4 UEK ■ Windows Server 2012 Standard ■ Windows Server 2012 R2 Standard ■ Windows 2008 R2 SP1 Enterprise (64 bit) ■ Windows 2008 R2 SP1 Standard (64 bit) <p data-bbox="428 699 1276 722">Note: Make sure that you install the English versions of these operating systems.</p> <p data-bbox="428 737 716 760">Oracle Database Software:</p> <ul data-bbox="428 777 740 800" style="list-style-type: none"> ■ Same as Database Server. <p data-bbox="428 814 570 837">Tool Version:</p> <ul data-bbox="428 854 613 877" style="list-style-type: none"> ■ BIP 11.1.1.7.1 <p data-bbox="428 892 818 915">Additional Software Requirements:</p> <ul data-bbox="428 932 915 1041" style="list-style-type: none"> ■ Dotnet Framework 3.5 Service Pack 1 ■ Oracle Access Manager 11.1.1.7 (optional) ■ Webgate 10.1.4.3 (optional) |
| BusinessObjects Server | <p data-bbox="428 1062 764 1085">Supported Operating Systems:</p> <ul data-bbox="428 1102 906 1245" style="list-style-type: none"> ■ Windows 2008 R2 SP1 Enterprise (64 bit) ■ Windows 2008 R2 SP1 Standard (64 bit) ■ Windows 2008 SP2 Enterprise (32 bit) ■ Windows 2008 SP2 Standard (32 bit) <p data-bbox="428 1260 1276 1283">Note: Make sure that you install the English versions of these operating systems.</p> <p data-bbox="428 1297 1357 1350">Oracle Database Software: Oracle Client 11.2.0.4 (32 bit and 64 bit) (with SQL Plus, SQL Loader, Oracle and OLEDB Objects)</p> <p data-bbox="428 1365 1110 1388">Hardware Requirements: Same as the Argus Insight Web Server</p> <p data-bbox="428 1402 597 1425">Reporting Tool:</p> <ul data-bbox="428 1442 951 1465" style="list-style-type: none"> ■ BusinessObjects XI Release 4.0 Service Pack 6 |

Table 1–2 (Cont.) Argus Insight Software and Hardware Requirements

| Component | Requirements |
|---|---|
| Cognos Server | <p>Supported Operating Systems:</p> <ul style="list-style-type: none"> ■ Windows 2008 R2 SP1 Enterprise (64 bit) ■ Windows 2008 R2 SP1 Standard (64 bit) ■ Windows 2008 SP2 Enterprise (32 bit) ■ Windows 2008 SP2 Standard (32 bit) <p>Note: Make sure that you install the English versions of these operating systems.</p> <p>Oracle Database Software: Oracle Client 11.2.0.4 (with SQL Plus, SQL Loader, Oracle and OLEDB Objects)</p> <p>Hardware Requirements: Same as the Argus Insight Web Server</p> <p>Reporting Tool:</p> <ul style="list-style-type: none"> ■ Cognos 10.2.x BI Server (default installation with all components except Cognos Content Database) ■ Cognos 10.2 BI Modeling (default installation with all components) <p>Additional Software Requirements:</p> <ul style="list-style-type: none"> ■ Oracle Access Manager 11.1.1.7 (optional) ■ Webgate 10.1.4.3 (optional) |
| Oracle Business Intelligence Enterprise Edition (OBIEE) | <p>Supported Operating Systems:</p> <ul style="list-style-type: none"> ■ Windows 2008 Server 2008 R1 SP1 or above (32 bit or 64 bit) <p>Note: Make sure that you install the English versions of these operating systems.</p> <p>Additional Software Requirements:</p> <ul style="list-style-type: none"> ■ OBIEE Administrator Tool 11.1.1.7.1 must be installed for configuring the repository file (RPD). <p>Refer to the <i>Oracle OBIEE Installation Manual</i> for further hardware and software requirements.</p> |
| Argus Insight Client | <p>Supported Operating Systems:</p> <ul style="list-style-type: none"> ■ Windows 7 (32/64 bit), (English version) ■ Windows 8 (32/64 bit), (English version) <p>Hardware Requirements:</p> <ul style="list-style-type: none"> ■ 2.0 GHz Minimum, 1 GB Memory <p>Additional Software Requirements:</p> <ul style="list-style-type: none"> ■ Adobe Acrobat Reader 11 ■ Microsoft Excel 2007, 2010, or 2013 ■ Microsoft Internet Explorer 9.0 (32 bit, latest version), or 10.0 (32 bit) |

1.3 Important Installation Information

Before installing Argus Insight, review the information in this section carefully. You may need to modify several settings or install required software *before* you install the Argus Insight application.

1.3.1 Installation Requirements for the Servers

For the Argus Insight Web Server, BI Publisher, BusinessObjects Server, or Cognos Server:

- **Installation Language** — You must install all software with the language setting configured to English. For example, if Oracle is installed in a language other than English, the registry entries are created with different names. Therefore, to avoid errors, install all software in English.
- **Oracle Client** — You must install the Oracle client with the default `ORACLE_HOME` name, provided by the Oracle Universal Installer. Failure to do so will display an error message, stating that the Oracle OLE DB provider was not found during installation.
- **Time Zone** — You must set all servers to the same time zone.
- **Default Language Setting** — All the servers must have the default language setting enabled for US English.

To enable US English as the default language setting:

1. Open the Microsoft System Registry Editor.
 - a. Click **Start**.
 - b. Select **Run**.
 - c. Enter **regedit**, and then click **OK**.
2. Navigate to the following folder:
HKEY_USERS\DEFAULT\Control Panel\International
3. Double-click the **sCountry** key in the right pane.
 - a. In the **Value data** field, enter **United States**.
 - b. Click **OK** to save changes.
4. Exit from the Registry Editor.
5. Restart the server to reflect the changes.

Additional Notes:

- **For Argus Insight Web Server:**
 - Install the Oracle client *after* you install the Dotnet Framework.
 - Ensure that either you have disabled the firewall or you have added the Argus Insight port number in the Windows Firewall Exception list. The default port number for Argus Insight is 8084.
- **For BI Publisher:**
 - Ensure that you have disabled the firewall. Alternatively, if the firewall is enabled, ensure that BI Publisher is accessible from other machines on the network.
- **For BusinessObjects Server:**
 - Ensure that you have disabled the firewall. Alternatively, if the firewall is enabled, ensure that BusinessObjects is accessible from other machines on the network.
- **For Cognos Server:**
 - Ensure that you have disabled the firewall. Alternatively, if the firewall is enabled, ensure that Cognos is accessible from other machines on the network.

1.3.2 Installation Requirements for the Argus Insight Client

To run the Argus Insight application, you must configure the following settings on the Argus Insight client machine:

- Add the Argus Insight URL to the trusted sites.
- Enable Cookies to the lowest possible security level.
- Enable Javascript.
- Enable the **Allow script-initiated windows without size or position constraints** setting in Internet Explorer.

To enable this setting:

1. Start Internet Explorer.
2. Open the **Tools** menu, and select **Internet Options**.
3. Select the **Security** tab.
4. Click **Custom level**.
5. Scroll to the Miscellaneous settings.
6. Enable the **Allow script-initiated windows without size or position constraints** setting.
7. Click **OK** to save changes.

1.3.3 General Installation Notes and Information

- All the information about LDAP, Single Sign-On Header, and SMTP configuration will be synchronized in real-time and also by ETL.
- Ensure that you have configured the Argus Safety URL in the Argus Safety Load Balancer Server.

To do so:

1. Navigate to **Argus Console, System Management** (Common Profile Switches), and select **Network Settings**.
2. In the Argus Safety Load Balancer Server text box, enter either the Argus Safety URL or the Argus Safety Load Balancer URL.

Installing Argus Insight

This chapter explains how to use the installation wizard to install Argus Insight, including the application software and standard reports, and the Schema Creation Tool.

This chapter includes the following topics:

- [Before You Install the Argus Insight Application](#)
- [Installing Argus Insight Components onto the Web Server](#)
- [Enabling SSL Support for the Argus Insight Website](#)

2.1 Before You Install the Argus Insight Application

Before you begin to install the Argus Insight application, you must verify or obtain the following information:

1. **Requirements** — Read [Section 1.2, "Software and Hardware Requirements"](#) and verify that your system meets the minimum requirements.
2. **Database Instance** — Verify that the Argus Insight database instance has been created and that it is running. In addition, verify that the database has been created using the character set of your Argus Safety database.
3. **Cryptographic Key** — Log in to the Argus Safety Web Server. Copy the **UserCryptoKey** from the ArgusSecureKey.ini file located at C:\Windows. You need to specify this key during the installation of Argus Insight.
4. **Security** — Log in to the Argus Insight Web Server.
 - a. Ensure that the **IUSR** user or the user configured in Internet Information Services (IIS) has sufficient privileges for running the Argus Insight application. See the *Oracle Argus Insight Minimum Security Configuration Guide* for more information.
 - b. Ensure that the ASP and ASP.Net extensions are enabled in IIS.

2.2 Installing Argus Insight Components onto the Web Server

Note: If you are upgrading Argus Insight from 7.0.4 to Argus Insight 8.0, first uninstall the application using Argus Insight application, and then run the Argus Insight 8.0 Installer.

To uninstall the existing application, see [Section 11, "Uninstalling the Argus Insight Application"](#).

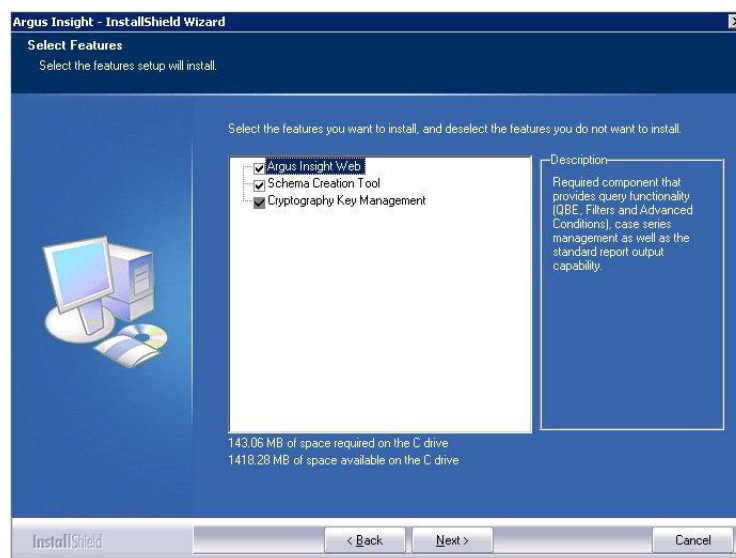
To run the installation wizard and install the Argus Insight components onto the Web Server:

1. Download the Argus Insight software from Oracle E-delivery and copy the software to the Argus Insight Web Server.
2. Log in to the Argus Insight Web Server as a user with administrator privileges.
3. Click **setup.exe**.

The Welcome screen of the installation wizard appears.

4. Click **Next** to continue.
5. Enter your user name and company name into the appropriate fields.
6. Click **Next** to continue.

The Select Features dialog box appears.



7. Clear any feature that you do not want to install. By default, the wizard installs all features.
8. Click **Next** to continue.

The Choose Destination Location dialog box appears.

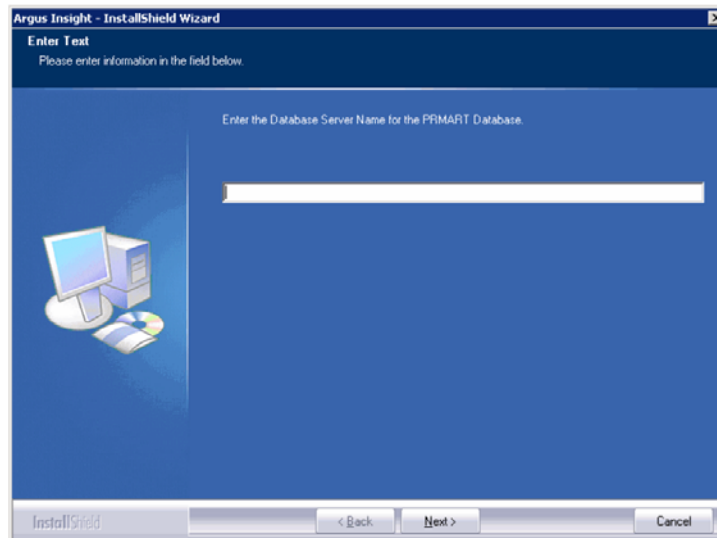
9. Specify the folder where the system installs the Argus Insight application.
 - To install into the default folder (C:\Program Files\Oracle), click **Next**.
 - To install into a different folder, click **Browse**, select another folder, and then click **Next**.

A message appears stating that the wizard is ready to install the Argus Insight files.

10. Click **Install** to start the installation.

A message appears stating that Argus Insight is configuring your new software along with the progress bar.

When the installation is done, the following dialog box appears:



11. Enter the name of the host database server where the Argus Insight data mart is located, and click **Next**.
12. Enter the instance name for the Argus Insight data mart, and click **Next**.
13. Enter the database port number you want to assign to the Argus Insight database, and click **Next**.

The system updates the TNSNAME.ORA file with the information as specified.

When the update is done, the Cryptographic Key dialog box appears.

14. Enter the cryptographic key for Argus Insight, and then click **Next** to continue.

Note: The cryptographic key is in the ArgusSecureKey.ini file located at C:\Windows on the Argus Safety Web Server with name as **UserCryptoKey**. You should have obtained this key during the pre-installation tasks.

15. Enter the password for APR_USER.

Note: The APR_USER database user provides initial database access to the application user (APR_APP) of Argus Insight. Make sure that this password is the same on all machines where any Argus Insight components are stored.

You will be prompted to create or update this user during schema creation. You can modify this password by running the Argus Insight installer and selecting the Modify option. For information about updating the APR_USER password, see [Section 2.2.1, "Changing the APR_USER Password."](#)

16. Click **Next** to continue.

The Confirm Password dialog box appears.

17. Re-enter the APR_USER password for verification.
18. Click **Next**.

The Port Number dialog box appears.

19. Enter the port number you want to assign to the Argus Insight website.

The default value is **8084**. If you are unsure of the port number, use the default value.

20. Click **Next**.

The Argus Insight application is installed successfully.

21. Click **Finish** to exit from the installation wizard.

A confirmation dialog box appears — Argus Insight Install wizard will now reboot the system. Please save any unsaved work.

22. Click **OK** to restart the Argus Insight Web Server.

2.2.1 Changing the APR_USER Password

You need to update the password on the database level and the Argus Insight Web Server or Cognos Server. The Argus Insight application uses this password to communicate with the database initially.

Before changing the password for the APR_USER on any Argus Insight Web Server or Cognos Server:

- Stop the Argus Insight service.
- Stop IIS on the Argus Insight Web Server.
- Stop the IIS and the Cognos service on the Cognos Server.

This is required only when you are using Cognos 10 as your Business Intelligence tool.

- Update the password of APR_USER on database level.

You need to update the password at the database level before you can modify the password for the Argus Insight Web Server.

You can modify the password for APR_USER on any Argus Insight Web Server or Cognos Server by running the Argus Insight installer on each server.

To modify the APR_USER password:

1. Run **setup.exe** to start the Argus Insight installer.
The Argus Insight Setup Maintenance dialog box appears.
2. Select **Modify**, and click **Next**.
3. Select **Change the password for APR_USER**, and click **Next**.
4. Enter the **APR_USER** password.

The password you enter must be the same password for each server being used by Argus Insight and must be configured in the Argus Insight database.

5. Click **Next**.

A dialog box to confirm new password appears.

6. Enter the new **APR_USER** password a second time for verification.
7. Click **Next**.

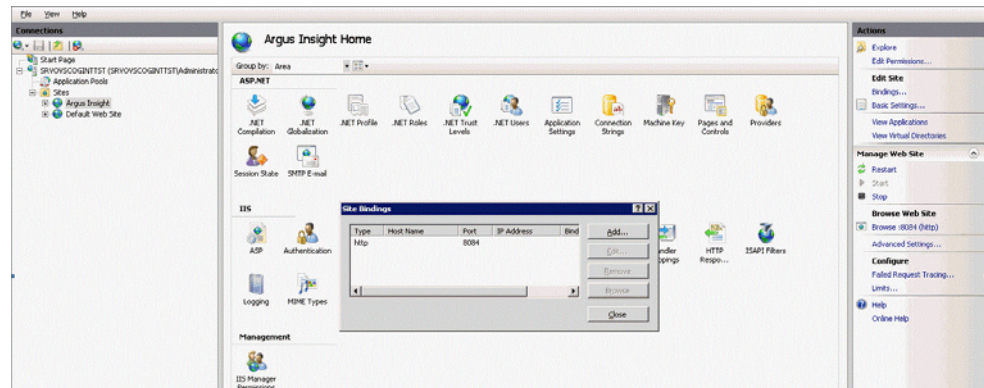
The system updates the password for APR_USER.

2.3 Enabling SSL Support for the Argus Insight Website

To enable SSL support for the Argus Insight website:

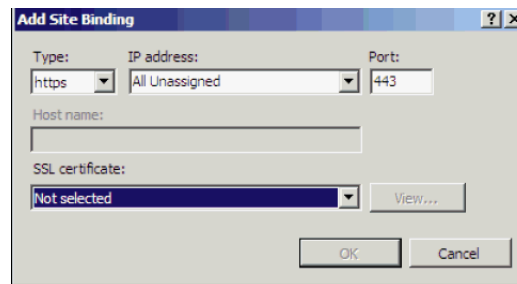
1. Log in to the Argus Insight Web Server.
2. Obtain and install the SSL certificate.
3. Go to IIS Manager.
4. Select **Argus Insight**, and select **Bindings**.

The Site Bindings dialog box appears.



5. Click **Add**.

The Add Site Binding dialog box appears.



6. Enter the following details in the Add Site Binding dialog box:
 - a. In the **Type** field, select **https**.
 - b. In the **SSL certificate** field, select your security certificate.
 - c. Click **OK**.

Creating the Argus Insight Data Mart Structure

The Argus Insight Schema Creation Tool lets you create the Argus Insight data mart structure. It creates a link between source Argus database and new Argus Insight data mart. The Extract Transform and Load (ETL) process uses this link to transfer data from Argus Safety database to the Argus Insight data mart for reporting purposes.

During the schema creation process, you are required to create database users:

- To login in to the Argus Insight application.
- As schema owners.
- To support private database links (DB Links).

This chapter includes the following topics:

- [Before You Run the Argus Insight Schema Creation Tool](#)
- [Argus Insight Configuration Requirements](#)
- [Argus Insight Data Mart Tablespaces](#)
- [Starting the Argus Insight Schema Creation Tool](#)
- [Creating the Database Schema](#)
- [Validating the Schema](#)
- [Creating a Database Link from Argus Safety to Insight Database](#)
- [Upgrading Database from Argus Insight 7.0.4 to Argus Insight 8.0](#)
- [Running Additional Grant Scripts for Single DB Instance](#)
- [Creating Argus Insight Read-Only User](#)

Note: The Argus Insight database must be created with the same character set as the Argus Safety database. Make sure you have installed the requisite software as explained in [Section 1.2, "Software and Hardware Requirements"](#).

3.1 Before You Run the Argus Insight Schema Creation Tool

The GLOBAL_NAME and NLS_LENGTH_SEMANTICS database parameters must be configured properly in order for the Argus Insight Schema Creation Tool to run. You must check those settings *before* you run the Argus Insight Schema Creation Tool. If the parameters are not set properly, the Schema Creation Tool will fail.

To review and modify these database settings:

1. Contact your database administrator (DBA).
2. Verify that the database configuration file for the Argus Insight database defines the following database parameter values:
 - GLOBAL_NAME = FALSE
(This parameter must be set to FALSE for Argus Insight to be able to create the database links.)
 - NLS_LENGTH_SEMANTICS = CHAR
3. Restart the database instance to reflect the changes.

To create a DBA user:

If you want to use a different user than SYSTEM user to execute the Schema Creation Tool, then create a DBA user by executing the following .bat file:

ARGUS_INSIGHT_INSTALL_PATH/Database/Utils/ai_create_dba_user.bat

Besides creating the DBA user, this .bat file also provides minimum necessary privileges required for executing the Schema Creation Tool.

3.2 Argus Insight Configuration Requirements

This section lists the required and recommended values for:

- Database parameters
- Database I/O configuration
- RAM and CPU

3.2.1 Database Parameters

[Table 3–1](#) lists the database parameters and the values that must be set for Argus Insight.

For those parameters that require a numeric value, [Table 3–1](#) lists the minimum value recommended. You may need to increase the value depending on your system configuration and the number of cases. It is the responsibility of the database administrator to monitor the system and adjust the database parameters as necessary.

Table 3–1 Database Parameters for Argus Insight

| Database Parameter | Required Value |
|--|---|
| COMPATIBLE (for Oracle 11g R2) | 11.2.0.0.0 or later |
| CURSOR_SHARING | EXACT |
| GLOBAL_NAME | FALSE |
| JOB_QUEUE_PROCESSES | 10 (Minimum value recommended) |
| NLS_LENGTH_SEMANTICS | CHAR |
| OPTIMIZER_MODE | ALL_ROWS |
| OPTIMIZER_SECURE_VIEW_MERGING | TRUE |
| PARALLEL_MAX_SERVERS | Minimum value recommended based on the total number of cases: <ul style="list-style-type: none"> ■ Small (< 30,000 cases): 16 ■ Medium (30,000 to 200,000 cases): 32 ■ Large (200,000 to 1,000,000 cases): Default ■ Extra Large (> 1,000,000 cases): Default |
| PGA_AGGREGATE_TARGET | Minimum value recommended based on the total number of cases: <ul style="list-style-type: none"> ■ Small (< 30,000 cases): 0.5 GB ■ Medium (30,000 to 200,000 cases): 2 GB ■ Large (200,000 to 1,000,000 cases): 3 GB ■ Extra Large (> 1,000,000 cases): 4 GB |
| QUERY_REWRITE_ENABLED | TRUE (if computing statistics regularly) FALSE (if not computing statistics regularly) |
| SGA_MAX_SIZE | Greater than or equal to the value of the SGA_TARGET parameter. |
| SGA_TARGET | Minimum value recommended based on the total number of cases: <ul style="list-style-type: none"> ■ Small (< 30,000 cases): 1 GB ■ Medium (30,000 to 200,000 cases): 2.5 GB ■ Large (200,000 to 1,000,000 cases): 3.5 GB ■ Extra Large (> 1,000,000 cases): 4.5 GB <p>The 32-bit architecture allows for 4 GB of physical memory to be addressed. DBAs should verify the maximum addressable RAM for their respective architectures.</p> |
| UNDO_MANAGEMENT | AUTO |
| WORKAREA_SIZE_POLICY | AUTO |
| DB_BLOCK_BUFFERS (in MB) / DB_CACHE_SIZE | Leave set to the Oracle default value |
| DB_BLOCK_SIZE (in bytes) | Leave set to the Oracle default value |
| QUERY_REWRITE_INTEGRITY | Leave set to the Oracle default value |
| SHARED_POOL_SIZE | Leave set to the Oracle default value |

3.2.2 Database I/O Configuration

[Table 3–2](#) lists the minimum amount of disk space to allocate for the redo log files, TEMP tablespace, and UNDO tablespace.

Table 3–2 Recommended Database I/O Configuration for Argus Insight

| Database I/O Configuration | Total Number of Cases | | | |
|-----------------------------------|---|----------------------------|------------------------------|---------------------------|
| | Small (< 30,000) | Medium (30,000 to 200,000) | Large (200,000 to 1,000,000) | Extra Large (> 1,000,000) |
| Number and Size of Redo Log Files | Default | 3 X 500 MB | 5 X 500 MB | 5 X 500 MB |
| | The value depends on the characteristics of the I/O subsystem such as the I/O bandwidth, storage disks type, and RAID level. (Oracle recommends RAID 1+0 or similar.) | | | |
| TEMP Tablespace Size | 32 GB | 32 GB | 64 GB | 128 GB |
| UNDO Tablespace Size | 16 GB | 32 GB | 64 GB | 128 GB |
| | The recommended UNDO tablespace size is based on the projections with the following two parameter values: RETENTION=NOGUARANTEE UNDO_RETENTION=900 (seconds) | | | |

3.2.3 Recommended Configuration for the Database Server

Table 3–3 lists the recommended configuration (RAM and CPU) for the Argus Insight Database Server.

Table 3–3 Recommended Configuration for the Argus Insight Database Server

| Database Server Configuration | Total Number of Cases | | | |
|-------------------------------|------------------------------------|------------------------------------|-------------------------------------|-------------------------------------|
| | Small (< 30,000) | Medium (30,000 to 200,000) | Large (200,000 to 1,000,000) | Extra Large (> 1,000,000) |
| RAM | 4–8 GB | 8–16 GB | 16–32 GB | 16–32 GB |
| CPU | Equivalent to 2–4 Dual Core, 3 GHz | Equivalent to 4–8 Dual Core, 3 GHz | Equivalent to 8–12 Dual Core, 3 GHz | Equivalent to 8–12 Dual Core, 3 GHz |

Note: The Argus Insight Database and Argus Safety Database TNS names entry must be available in both Argus Insight Database Server and Argus Safety Database Server. Argus Safety Database TNS should also be present in the Argus Insight Web Server.

3.3 Argus Insight Data Mart Tablespaces

Table 3–4 lists the tablespaces for the Argus Insight data mart. Argus Insight creates these tablespaces when you create a database schema.

Note that the tablespace names begin with APR. The Argus Power Reports (APR) product was renamed to Argus Insight.

Table 3–4 Tablespaces Created for the Argus Insight Data Mart

| | | |
|-----------------------|------------------------|--------------------|
| APR_CFG_DATA_01 | APR_MEDM_DATA_01 | APR_MRPT_INDEX_01 |
| APR_MCAS_DATA_01 | APR_MEDM_INDEX_01 | APR_MRPT_INDEX_02 |
| APR_MCAS_DATA_02 | APR_MEDM_LOB_01 | APR_MRPT_INDEX_03 |
| APR_MCAS_HIST_DATA_01 | APR_MFACT_DATA_01 | APR_MWHOC_DATA_01 |
| APR_MCAS_HIST_DATA_02 | APR_MFACT_HIST_DATA_01 | APR_MWHOC_INDEX_01 |

Table 3–4 (Cont.) Tablespaces Created for the Argus Insight Data Mart

| | | |
|------------------------|-------------------------|--------------------|
| APR_MCAS_HIST_INDEX_01 | APR_MFACT_HIST_INDEX_01 | APR_SESM_DATA_01 |
| APR_MCAS_HIST_LOB_01 | APR_MFACT_INDEX_01 | APR_SESM_INDEX_01 |
| APR_MCAS_INDEX_01 | APR_MRPT_DATA_01 | APR_SESM_LOB_01 |
| APR_MCAS_INDEX_02 | APR_MRPT_DATA_02 | APR_STAGE_DATA_01 |
| APR_MCAS_LOB_01 | APR_MRPT_DATA_03 | APR_STAGE_DATA_02 |
| APR_MCFG_DATA_01 | APR_MRPT_HIST_DATA_01 | APR_STAGE_DATA_03 |
| APR_MCFG_HIST_INDEX_01 | APR_MRPT_HIST_DATA_02 | APR_STAGE_INDEX_01 |
| APR_MCFG_HIST_LOB_01 | APR_MRPT_HIST_DATA_03 | APR_STAGE_INDEX_02 |
| APR_MCFG_INDEX_01 | APR_MRPT_HIST_INDEX_01 | APR_STAGE_INDEX_03 |
| APR_MCFG_LOB_01 | APR_MRPT_HIST_INDEX_02 | APR_STAGE_LOB_01 |
| APR_MCFG_LOG_01 | APR_MRPT_HIST_INDEX_03 | APR_SWHOC_DATA_01 |

3.4 Starting the Argus Insight Schema Creation Tool

To start the Argus Insight Schema Creation Tool:

1. Log in to the Argus Insight Web Server.
2. Click **Start**.
3. Navigate to **Programs > Oracle > Argus Insight**, and select **Schema Creation Tool**.

The Schema Creation Tool appears.

**Table 3–5 Summary of the Schema Creation Tool options**

| Option | Description | Reference |
|-------------------|--|---|
| Create Schema | Creates a new database schema for Argus Insight. | Section 3.5, "Creating the Database Schema" |
| Schema Validation | Validates a newly-created database schema. | Section 3.6, "Validating the Schema" |
| Factory Data | Loads the factory data into the database. | Section 3.5.4, "Loading Factory Data" |

Table 3–5 (Cont.) Summary of the Schema Creation Tool options

| Option | Description | Reference |
|---------------------|---|---|
| Initial ETL | Runs the initial process of extracting, transforming, and loading data. | Chapter 5, "Extracting, Transforming, and Loading Data" |
| DB Upgrade | Upgrades an existing Argus Insight 7.0.4 database to an Argus Insight 8.0 database. | Section 3.8, "Upgrading Database from Argus Insight 7.0.4 to Argus Insight 8.0" |
| Export Data | Exports data. | Section 4.7.1, "Exporting Data" |
| Import Data | Imports data. | Section 4.7.2, "Importing Data" |
| Argus DBLink | Creates a link between Argus Insight and Argus Safety. | Section 3.7, "Creating a Database Link from Argus Safety to Insight Database" |
| Argus User Creation | Lets you create Argus Insight users and roles. | Section 3.5.1, "Creating Users and Roles in the Argus Safety Database" |
| Exit | Exits from the Schema Creation Tool. | NA |

3.5 Creating the Database Schema

This section describes the tasks associated with creating the database schema:

- [Creating Users and Roles in the Argus Safety Database](#)
- [Clearing the Cache](#)
- [Creating a New Schema for Argus Insight](#)
- [Loading Factory Data](#)

3.5.1 Creating Users and Roles in the Argus Safety Database

To create users and roles:

1. Start the Argus Insight Schema Creation Tool.
2. Click **Argus User Creation**.

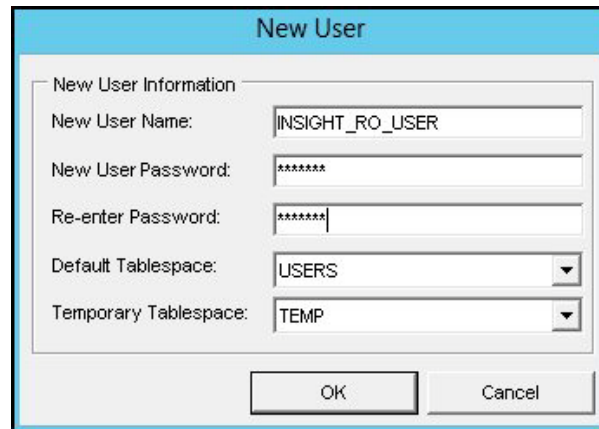
The Oracle Database Connect dialog box appears.

3. Connect to the Oracle Database:
 - a. In the **User** field, enter the name of Argus Safety SYSTEM or DBA user.
 - b. In the **Password** field, enter the password for Argus Safety SYSTEM or DBA user.
 - c. In the **Argus Safety Database** field, enter the name of your Argus Safety database instance.
 - d. Click **OK**.

The Argus Safety Read Only User Creation dialog box appears.

4. Click **New User**.

The New User dialog box appears.



The 'New User' dialog box has a title bar 'New User'. It contains a section titled 'New User Information' with the following fields: 'New User Name' with the value 'INSIGHT_RO_USER', 'New User Password' with '*****', 'Re-enter Password' with '*****', 'Default Tablespace' with a dropdown menu showing 'USERS', and 'Temporary Tablespace' with a dropdown menu showing 'TEMP'. At the bottom are 'OK' and 'Cancel' buttons.

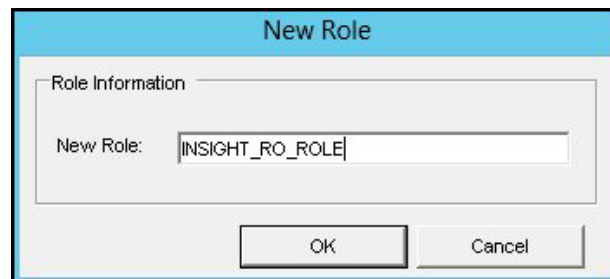
5. Complete the New User dialog box as follows:
 - a. Enter a name for the new user.
 - b. Specify and confirm the password for the user.
 - c. Select the default and temporary tablespaces required by your corporate standards, or leave the default values.
 - d. Click **OK**.

You return to the Argus Safety Read Only User Creation dialog box.

Note: You must create the INSIGHT_RO_USER and INSIGHT_RO_ROLE, if they do not exist in the Argus Safety schema. Make the appropriate selection in Step 8 below for **New User Name** and **New Role** drop-downs and proceed.

6. Click **New Role**.

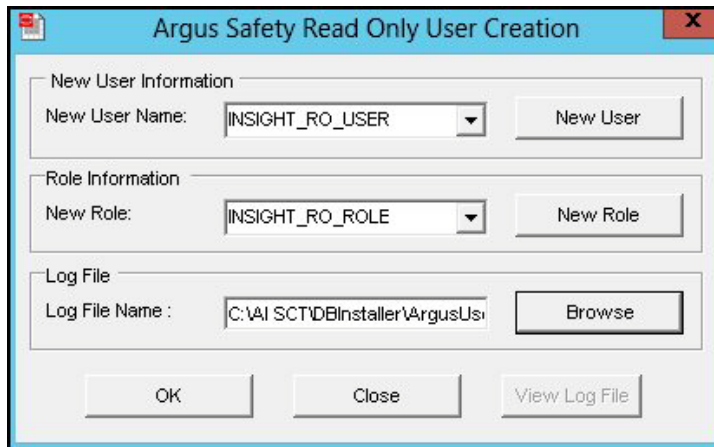
The New Role dialog box appears:



The 'New Role' dialog box has a title bar 'New Role'. It contains a section titled 'Role Information' with the following field: 'New Role' with the value 'INSIGHT_RO_ROLE'. At the bottom are 'OK' and 'Cancel' buttons.

7. Enter the name of the new role to create, and then click **OK**.

You return to the Argus Safety Read Only User Creation dialog box.



Note: In case you have upgraded the database from Argus Insight 7.0.4 to 8.0, you can also select the existing user, which you have already created earlier, from the **New User Name** drop-down list.

8. Complete the Argus Safety Read Only User Creation dialog box as follows:
 - a. In the **New User Name** field, select **INSIGHT_RO_USER**.
 - b. In the **New Role** field, select **INSIGHT_RO_ROLE**.
 - c. In the **Log File Name** field, enter the complete path for the location and name of the log file.
 Alternatively, you can click **Browse** to select the location for the log file, enter the file name, and then click **Save**.
9. Click **OK** when you are ready to create the specified user with the specified role.
 The command prompt screen appears.

```
SQL*Plus: Release Production on Fri Jun 20 17:06:58
Copyright (c) Oracle. All rights reserved.

#####
###                               ###
###                               Argus Insight                               ###
###                               ###
### Argus Safety Database User Creation Script                               ###
### Grants necessary privileges to Safety RO User and Role                  ###
### Copyright Oracle Corporation. All Rights Reserved.                      ###
###                               ###
#####
Enter Password for user SYSTEM : _
```

10. Enter the password for the Argus Insight SYSTEM or SAFETY_DBA_USER user, and press **Enter**.
11. Verify that the script is successfully connected as <SYSTEM/DBA User Name>@<Argus Safety Database Name>.

```

#####
##                               Argus Insight                               ##
##                               #####                               ##
##      Argus Safety Database User Creation Script                        ##
##      Grants necessary privileges to Safety RO User and Role           ##
##      Copyright Oracle Corporation. All Rights Reserved.               ##
##                               #####                               ##
#####

Enter Password for user SYSTEM :
-----
-- Connecting to SYSTEM
-----
Connected.

#####
##                               #####                               ##
##      If user failed to connect to database then stop here and restart the tool ##
##                               #####                               ##
##      To stop processing close current window.                         ##
##                               #####                               ##
#####

Press Enter if the Script successfully connected as SYSTEM@ARGUS

```

12. Press **Enter**.

The information about the Argus Safety database name, the name of the user to create, the role to assign to the user, and the name of the log file appears.

13. Verify that the information is correct, and then press **Enter** to continue.

The additional information about creating the user and granting privileges appears.

14. Press **Enter** to complete the installation.

A message stating that the user account has been created successfully appears along with the folder location of the log files.

15. Click **OK** to close the message box.

You return to the **Argus Safety Read Only User Creation** dialog box.

16. Click **View Log File**.

- a. Review the information in the log file and check for any errors.
- b. After reviewing, close the log file.

17. Click **Close** to close the **Argus Safety Read Only User Creation** dialog box.

3.5.2 Clearing the Cache

If you are using the same Database Installer used to create an earlier schema, you **must** clear its cache.

To clear the cache:

1. Press and hold the **CTRL** key, and right-click the mouse.

The **Reset Cache?** dialog box appears.



2. Click **Yes**.

The cache is cleared and actions are logged in the **createlog.rtf** file.

3.5.3 Creating a New Schema for Argus Insight

Note: Before executing the steps for creating a new schema for Argus Insight, ensure that you have remote access to the SYS user.

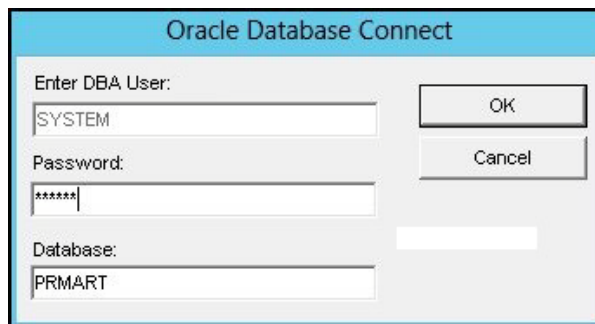
If you **do not** have remote access to SYS user, execute the **ai_sys{grant}.sql** script through SYS user. This SQL script is located in the following folder:

drive:\Program
Files\Oracle\ArgusInsight\Database\DBInstaller\DDL Folder

To create a new schema for Argus Insight:

1. Start the Argus Insight Schema Creation Tool.
2. Click **Create Schema**.

The Oracle Database Connect dialog box appears.



3. Connect to the Oracle Database:
 - a. In the **User** field, enter the name of Argus Insight SYSTEM or DBA user.
 - b. In the **Password** field, enter the password for Argus Insight SYSTEM or DBA user.
 - c. In the **Database** field, enter the TNS entry for the Argus Insight database.
 - d. Click **OK**.

Note that:

- If the NLS_LENGTH_SEMANTICS database parameter is not set to **CHAR**, an error message appears. You cannot proceed with the process of creating a new schema. You must set the NLS_LENGTH_SEMANTICS parameter to CHAR in the Argus Insight data mart and then restart the database instance.

See [Section 3.1, "Before You Run the Argus Insight Schema Creation Tool"](#) for details.

- If the NLS_LENGTH_SEMANTICS database parameter is set to **CHAR**, the New User dialog box for the **APR_MART** user appears.

The image shows a 'New User' dialog box with a light blue title bar. Inside, there is a section titled 'New User Information'. It contains several input fields: 'New User Name' with the text 'APR_MART', 'New User Password' with seven asterisks, and 'Re-enter Password' with seven asterisks. Below these are two dropdown menus: 'Default Tablespace' set to 'USERS' and 'Temporary Tablespace' set to 'TEMP'. At the bottom right are 'OK' and 'Cancel' buttons.

4. Enter a password for the **APR_MART** user (which is the schema owner), and then re-enter to confirm the password.
5. Click **OK**.

The New User dialog box for the **APR_APP** user appears.

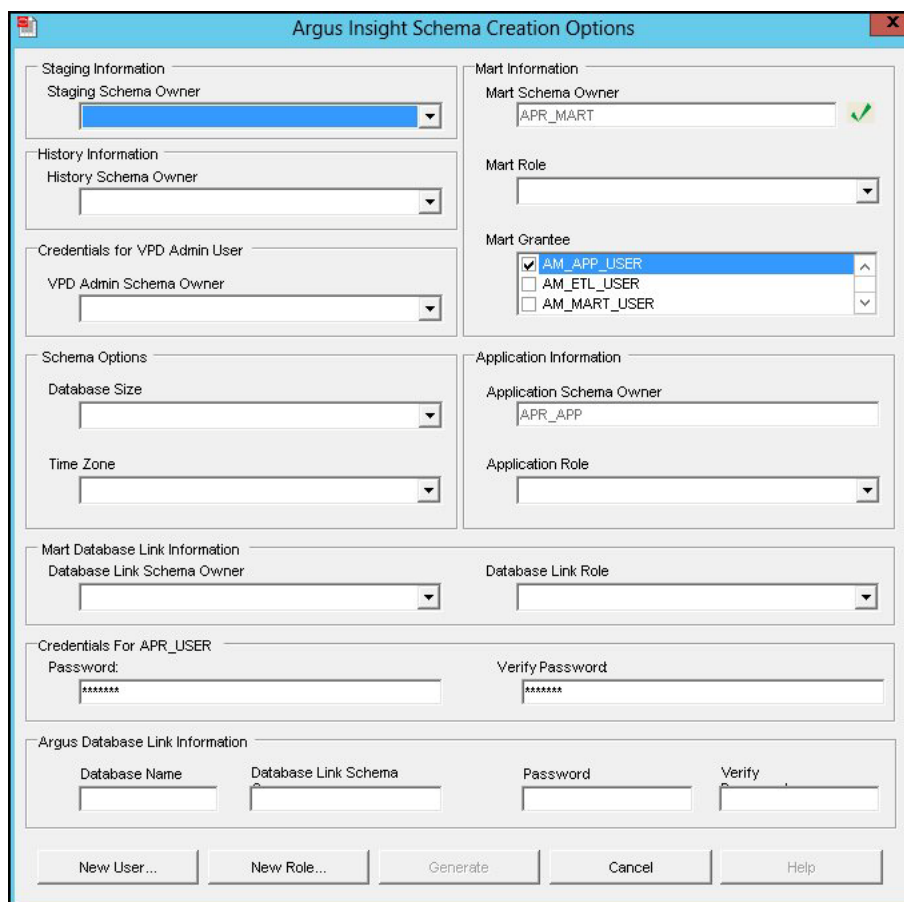
The image shows a 'New User' dialog box, similar to the one above but for the 'APR_APP' user. The 'New User Name' field contains 'APR_APP'. The 'New User Password' and 'Re-enter Password' fields both contain seven asterisks. The 'Default Tablespace' dropdown is set to 'USERS' and the 'Temporary Tablespace' dropdown is set to 'TEMP'. 'OK' and 'Cancel' buttons are at the bottom right.

6. Enter a password for the **APR_APP** user, and then re-enter to confirm the password.

Note: Argus Insight uses the **APR_APP** user account for all application access and reporting. The password for this user is stored in encrypted form in the **CMN_PROFILE_GLOBAL** table. If you need to change this password in the future or if you forget the password, you must contact Oracle Support for assistance in resetting the **APR_APP** password in the **CMN_PROFILE_GLOBAL** table. If the password for this user is not in synchronization with the value in the **CMN_PROFILE_GLOBAL** table, the Argus Insight application will not work.

7. Click **OK**.

The Argus Insight Schema Creation Options dialog box appears.



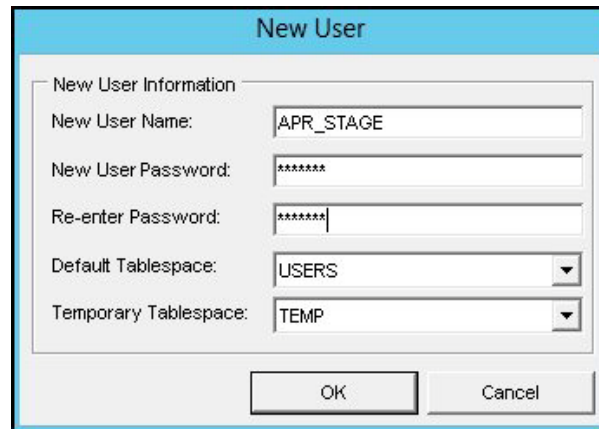
The dialog box titled "Argus Insight Schema Creation Options" contains several sections for configuring the database schema:

- Staging Information:** Staging Schema Owner (dropdown).
- History Information:** History Schema Owner (dropdown).
- Credentials for VPD Admin User:** VPD Admin Schema Owner (dropdown).
- Schema Options:** Database Size (dropdown), Time Zone (dropdown).
- Mart Information:**
 - Mart Schema Owner: APR_MART (text field with a green checkmark).
 - Mart Role: (dropdown).
 - Mart Grantee:
 - ☒ AM_APP_USER
 - ☐ AM_ETL_USER
 - ☐ AM_MART_USER
- Application Information:**
 - Application Schema Owner: APR_APP (text field).
 - Application Role: (dropdown).
- Mart Database Link Information:**
 - Database Link Schema Owner: (dropdown).
 - Database Link Role: (dropdown).
- Credentials For APR_USER:**
 - Password: (masked text field).
 - Verify Password: (masked text field).
- Argus Database Link Information:**
 - Database Name: (text field).
 - Database Link Schema: (text field).
 - Password: (text field).
 - Verify: (text field).

At the bottom, there are buttons for "New User...", "New Role...", "Generate", "Cancel", and "Help".

8. Click **New User**.

The New User dialog box appears.



The 'New User' dialog box has a title bar 'New User'. It contains a section titled 'New User Information' with the following fields: 'New User Name:' with the value 'APR_STAGE', 'New User Password:' with '*****', 'Re-enter Password:' with '*****', 'Default Tablespace:' with a dropdown menu showing 'USERS', and 'Temporary Tablespace:' with a dropdown menu showing 'TEMP'. At the bottom are 'OK' and 'Cancel' buttons.

- a. In the **New User Name** field, enter one of the following names:
 - APR_STAGE
 - APR_LOGIN
 - APR_LINK_USER
 - APR_HIST
 - RLS_USER
- b. In the **New User Password** field, enter the password for the specified user.
- c. In the **Re-enter Password** field, enter the user password again for verification.
- d. Click **OK**.

You return to the Argus Insight Schema Creation Options screen.

Repeat this step until you have created all the above users.

9. Click **New Role**.

The New Role dialog box appears.



The 'New Role' dialog box has a title bar 'New Role'. It contains a section titled 'Role Information' with the following field: 'New Role:' with the value 'APR_ROLE'. At the bottom are 'OK' and 'Cancel' buttons.

- a. Enter one of the following names in the **New Role** field:
 - APR_ROLE
 - APR_LINK_ROLE
 - APR_APP_ROLE
- b. Click **OK**.

You return to the Argus Insight Schema Creation Options screen.

Repeat this step until you have created all the above roles.

10. Define the following users and roles in the Argus Insight Schema Creation Options screen:

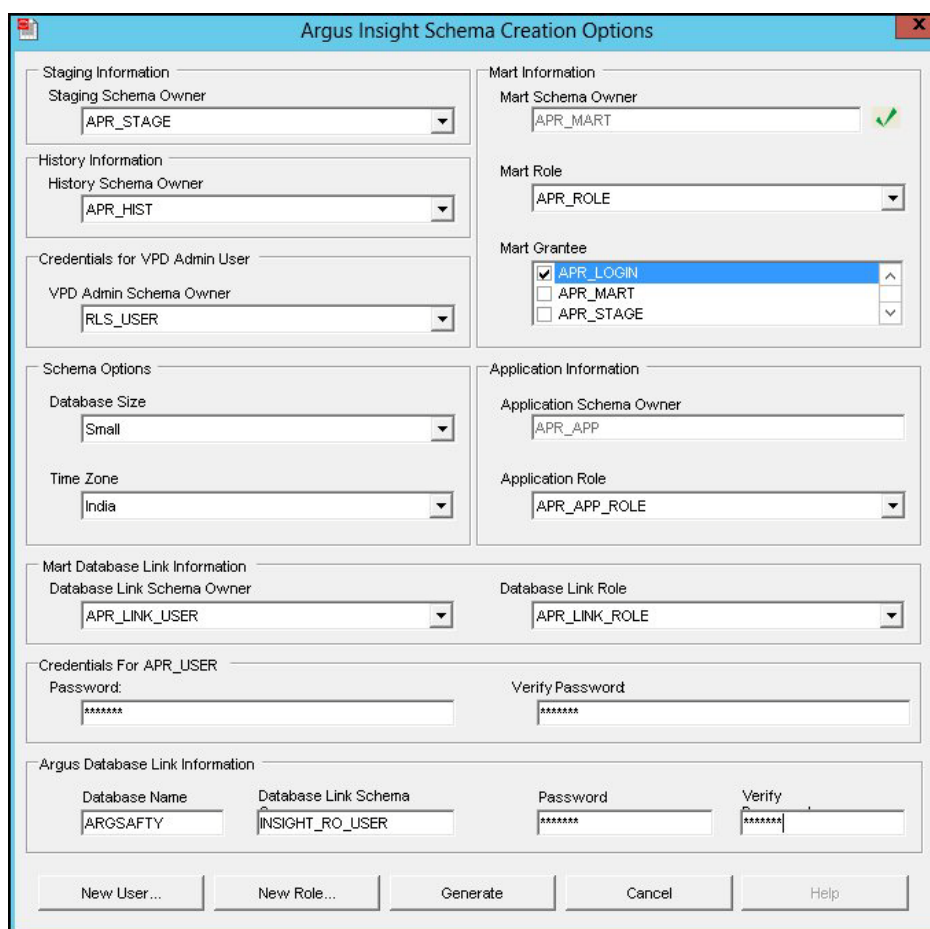
- a. From the **Staging Schema Owner** drop-down list, select **APR_STAGE**.
- b. From the **History Schema Owner** drop-down list, select **APR_HIST**.
- c. From the **VPD Admin Schema Owner** field, select **RLS_USER**.
- d. In the **Schema Options** section, select the Database Size and the Time Zone.
- e. From the **Mart Role** drop-down list, select **APR_ROLE**.
- f. In **Mart Grantee** section, select the **APR_LOGIN** check box.
- g. From the **Application Role** drop-down list, select **APR_APP_ROLE**.
- h. Under the MART Database Link Information section:
 - i. In the **Database Link Schema Owner** drop-down list, select **APR_LINK_USER**.
 - ii. In the **Database Link Role** drop-down list, select **APR_LINK_ROLE**.
- i. In the Argus Database Link Information section:

Note: The value you enter in the Database Link Schema Owner field should be the name of the Argus Insight read-only user that you created earlier in the installation process. See [Section 3.5.1, "Creating Users and Roles in the Argus Safety Database"](#) for details.

- i. In the **Database Name** field, enter the name of the Argus Safety database.
- ii. In the **Database Link Schema Owner** field, enter **INSIGHT_RO_USER**.
- iii. In the **Password** field, enter the password for the **INSIGHT_RO_USER**.
- iv. In the **Verify Password** field, re-enter the password.
- j. Optionally, in the Credentials for **APR_USER** section, enter and verify a new password only if you want to change the password for **APR_USER**.

All these inputs have been depicted in the following figure:

Note: You must update the **APR_USER** password using the instructions in the [Section 2.2.1, "Changing the APR_USER Password"](#) section, if you change the default **APR_USER** password. This is to update the password on the database level and the Argus Insight Web Server/Cognos Server.



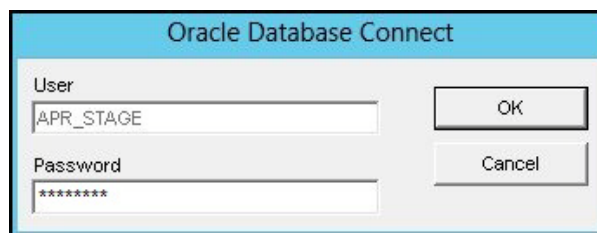
The dialog box titled "Argus Insight Schema Creation Options" contains the following sections:

- Staging Information:** Staging Schema Owner (APR_STAGE)
- History Information:** History Schema Owner (APR_HIST)
- Credentials for VPD Admin User:** VPD Admin Schema Owner (RLS_USER)
- Schema Options:** Database Size (Small), Time Zone (India)
- Mart Information:** Mart Schema Owner (APR_MART), Mart Role (APR_ROLE), Mart Grantee (APR_LOGIN, APR_MART, APR_STAGE)
- Application Information:** Application Schema Owner (APR_APP), Application Role (APR_APP_ROLE)
- Mart Database Link Information:** Database Link Schema Owner (APR_LINK_USER), Database Link Role (APR_LINK_ROLE)
- Credentials For APR_USER:** Password (*****), Verify Password (*****)
- Argus Database Link Information:** Database Name (ARGSAFTY), Database Link Schema (INSIGHT_RO_USER), Password (*****), Verify (*****)

Buttons at the bottom: New User..., New Role..., Generate, Cancel, Help.

11. Click **Generate.**

A dialog box to enter the password of the staging user (APR_STAGE user) appears.



The dialog box titled "Oracle Database Connect" contains the following fields and buttons:

- User:** APR_STAGE
- Password:** *****
- Buttons:** OK, Cancel

12. Enter the password, and click **OK.**

The system checks that Argus Insight and Argus Safety use the same character set. How the system continues depends on the result:

- Different Character Set** — If the character set for the Argus Insight database (that is, the MART character set) is different from the character set for the Argus Safety database, the system displays a warning message and prompts for confirmation that you want to proceed.

Determine whether you want to continue with the schema creation.

If the Argus Safety database uses the UTF character set and the Argus Insight database uses the ISO character set, the ETL process may fail due to the

different character sets. In this case, Oracle recommends that you click **No**, fix the character set issue, and restart the create schema process.

If the Argus Safety database uses the ISO character set and the Argus Insight database uses the UTF character set, then the system can proceed by ignoring the character set difference. In this case, you can click **Yes**.

- **Same Character Set** — If the character set for the Argus Insight database is the same as the character set for the Argus Safety database, the following command prompt screen appears:

```
#####
##                                     ##
##                               Argus Insight                               ##
##                                     ##
##   Grant Privileges On SYS Objects To Mart and App Schema Owner         ##
##   Copyright Oracle Corporation. All Rights Reserved.                   ##
##                                     ##
#####

#####
##                                     ##
## APR_MART, APR_APP, RLS_USER,                                           ##
## does not have access on required view(s)/package(s) owned by user SYS ##
##                                     ##
## If you have remote access to SYS user then provide SYS user password  ##
## else execute GRANT statements specified in                             ##
## dbinstaller\ddl\ai_sys{grant}.sql through SYS user after replacing    ##
## user variables.                                                         ##
## Close this command window after successful execution of grant statements##
##                                     ##
#####
Enter Password for user SYS : _
```

13. If you have remote access to the SYS user, enter the password for the SYS user, and press **Enter**.

The command prompt screen appears.

```
#####
##                                     ##
## If you have remote access to SYS user then provide SYS user password  ##
## else execute GRANT statements specified in                             ##
## dbinstaller\ddl\ai_sys{grant}.sql through SYS user after replacing    ##
## user variables.                                                         ##
## Close this command window after successful execution of grant statements##
##                                     ##
#####
Enter Password for user SYS :
-----
-- Connecting To SYS
-----
Connected.

#####
##                                     ##
## If user failed to connect to database then stop here and restart the tool##
##                                     ##
## To stop processing close current window.                              ##
##                                     ##
#####
Press ENTER if the script successfully connected as SYS@PRMART
```

OR

If you **do not** have remote access to SYS user, then execute **ai_sys{grant}.sql** script through SYS user. This SQL script is located in the following folder

drive:\Program Files\Oracle\ArgusInsight\Database\DBInstaller\DDL Folder

Open the **ai_sys{grant}.sql** file from the above mentioned location.

Execute all the GRANT statements after replacing the names of the variables with their corresponding Schema Owner name. For example:

- &mart_user. = APR_MART schema owner (APR_MART)

- &mart_app_user. = APR_APP schema owner (APR_APP)
- &rls_user. = VPD schema owner (RLS_USER)

If you have already executed the **ai_sys{grant}.sql** script through SYS user, then go to Step17 of this procedure.

14. Verify that the script is successfully connected as <SYS User Name>@<Argus Insight Database Name>, and press **Enter**.

The command prompt screen with the Grant succeeded message appears multiple times along with the location of the log file.

15. Verify the location of the log file, and press **Enter**.
16. Wait until the **Tablespace Creation** dialog box appears.

| Tablespaces | Small Model | Medium | Large Model | Complete Path and Datafile |
|-------------------------|-------------|--------|-------------|--|
| APR_CFG_DATA_01 | 51M | 76M | 101M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_CF |
| APR_MCAS_DATA_01 | 82M | 107M | 132M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCAS_DATA_02 | 76M | 101M | 126M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCAS_HIST_DATA_01 | 54M | 78M | 104M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCAS_HIST_DATA_02 | 53M | 78M | 103M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCAS_HIST_INDEX_01 | 62M | 88M | 115M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCAS_HIST_LOB_01 | 91M | 129M | 170M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCAS_INDEX_01 | 66M | 92M | 116M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCAS_INDEX_02 | 73M | 99M | 126M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCAS_LOB_01 | 217M | 328M | 687M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCFG_DATA_01 | 210M | 235M | 260M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCFG_HIST_INDEX_01 | 51M | 76M | 101M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCFG_HIST_LOB_01 | 71M | 96M | 121M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCFG_INDEX_01 | 114M | 139M | 164M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCFG_LOB_01 | 157M | 278M | 475M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MCFG_LOG_01 | 53M | 78M | 103M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MC |
| APR_MEDM_DATA_01 | 85M | 110M | 135M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_ME |
| APR_MEDM_INDEX_01 | 67M | 92M | 117M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_ME |
| APR_MEDM_LOB_01 | 66M | 98M | 131M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_ME |
| APR_MFACT_DATA_01 | 51M | 76M | 101M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MF |
| APR_MFACT_HIST_DATA_01 | 51M | 76M | 101M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MF |
| APR_MFACT_HIST_INDEX_01 | 51M | 76M | 101M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MF |
| APR_MFACT_INDEX_01 | 51M | 76M | 101M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MF |
| APR_MRPT_DATA_01 | 76M | 101M | 126M | C:\ORACLE11204\ORADATA\AIAM80MT\APR_MF |

17. Complete the Tablespace Creation screen as follows:

- a. In the **Enter Database Server Directory where all Data Files will be Created** field, enter the complete path to the directory for the tablespace data files that will be used by Argus Insight.

For example, /u01/app/oracle/SMTEST.

Note that the directory you specify must already exist.

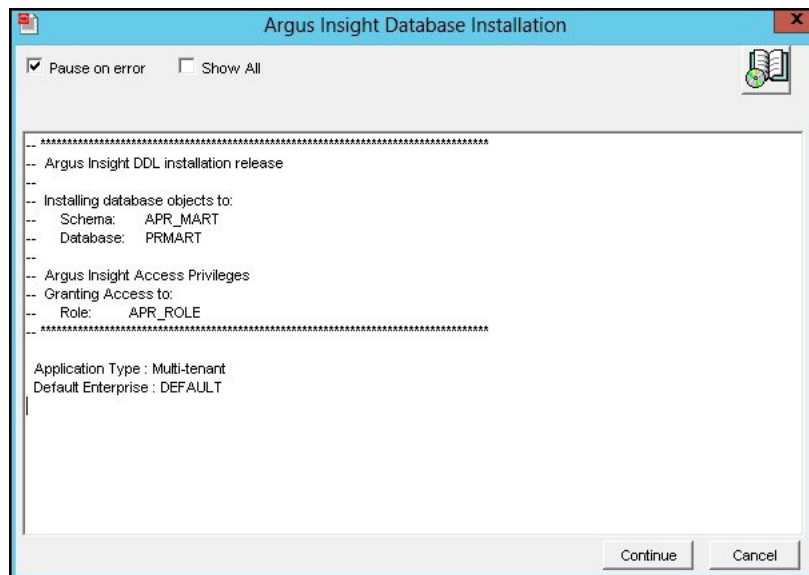
- b. Click **Generate DataFile Path and Name**.

The Complete Path and Datafile column for all tablespaces are automatically filled.

Note that the system automatically selected the delimiter character to use for the directory path based on the Database Server operating system.

18. Click **Create Tablespace** to create all tablespaces.

19. Wait until the system creates the tablespaces and opens the Argus Insight Database Installation dialog box with the Application Type and the name of the default enterprise.



20. Click **Continue** to start the schema creation.

The system executes the scripts, displays status information during the schema creation process, and reports when the update is completed.

21. Click the **Book** icon to view the log file and check for errors.

Alternatively, you can view the log file at any time at the following location:

drive:\Argus_Insight_Working\AI80\Database\DBInstaller\CreateLog.rtf

22. Click **Finish** to close the dialog box.

3.5.4 Loading Factory Data

To load the factory data:

1. Start the Argus Insight Schema Creation Tool.
2. Click **Factory Data** to load the factory data.

The command prompt screen appears.

```
SQL*Plus: Release Production on Fri Jun 7 12:28:22
Copyright (c) Oracle. All rights reserved.

#####
##                               ##
##          Argus Insight        ##
##                               ##
##          Factory Data Load Script      ##
##          Copyright Oracle Corporation. All Rights Reserved.      ##
##                               ##
#####
Enter Password for User APR_MART : _
```

3. Enter the password for the **APR_MART** User, and press **Enter**.

The command prompt screen appears.


```

#####
##                                     ##
##               Argus Insight         ##
##                                     ##
##               Factory Data Load Script ##
##   Copyright Oracle Corporation. All Rights Reserved. ##
##                                     ##
#####
Enter Password for User APR_MART :
Connecting to APR_MART@PRMART
Connected.
#####
##                                     ##
## If user failed to connect to database then stop here and restart the tool ##
##                                     ##
## To stop processing close current window. ##
##                                     ##
#####
Press Enter if the Script successfully connected as APR_MART@PRMART
_

```

4. Verify that the script is successfully connected as <APR_MART User Name>@<Argus Insight Database Name>, and press **Enter**.

The row creation messages appears multiple times along with the name (insight_factory_data_log.txt) and location of the log file.

5. Press **Enter**.

A message appears when the process to loading factory data is complete along with the location of the log file.

6. Click **OK** to return to the Schema Creation Tool screen.

3.6 Validating the Schema

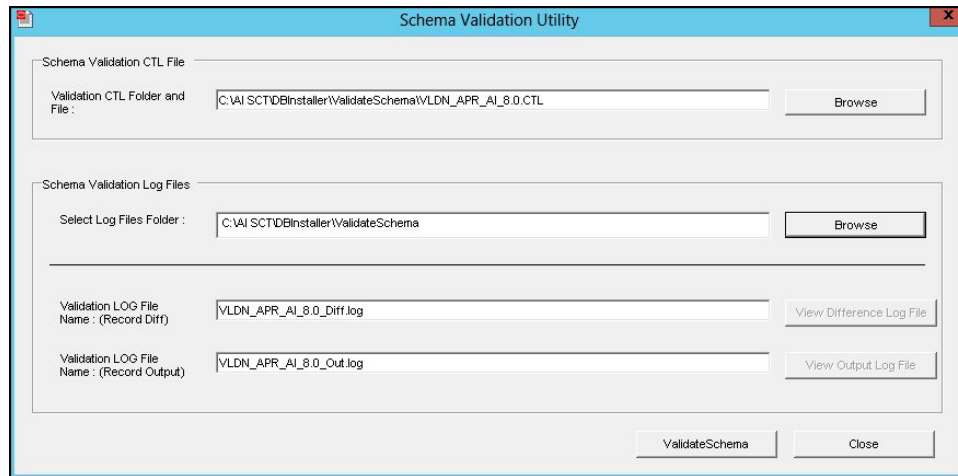
To validate the database schema:

1. Start the Argus Insight Schema Creation Tool.
2. Click **Schema Validation**.

The Oracle Database Connect dialog box appears.

3. Connect to the Oracle Database:
 - a. In the **User** field, enter the name of the Argus Insight SYSTEM or DBA user.
 - b. In the **Password** field, enter the password for the Argus Insight SYSTEM or DBA user.
 - c. In the **Database** field, enter the name of the Argus Insight Data Mart instance.
 - d. Click **OK**.

The Schema Validation Utility dialog box appears.



4. Complete the Schema Validation Utility dialog box as follows:
 - a. For the **Validation CTL Folder and File** field, click **Browse** next to the field to navigate to the location of the CTL file that you want to verify. Select the CTL file, and then click **Open**.

You return to the Schema Validation Utility dialog box.

- b. For the **Select Log Files Folder** field, click **Browse** next to the field to navigate to and select the log files folder. Click **OK** to close the Select Folder dialog box and return to the Schema Validation Utility dialog box.

Note that the default file names are automatically populated in the Validation LOG File Name (Record Diff) and Validation LOG File Name (Record Output) fields. You may change the log file names.

5. Click **Validate Schema**.

The command prompt screen appears:

```
SQL*Plus: Release Production on Fri Jun 7 12:52:20
Copyright (c) Oracle. All rights reserved.

#####
##                               Argus Insight Release                               ##
##                                                                                     ##
##      Schema Validation / Database Objects Verifier Tool                          ##
##      Copyright Oracle Corporation. All Rights Reserved.                          ##
##                                                                                     ##
## Assumptions:                                                                    ##
## (1) SYSTEM user does not own a table called ULD_SCH_TOOL_0001                    ##
## (2) Default Tablespace for SYSTEM user contains at least 32 KB free space        ##
##                                                                                     ##
#####
Enter Password for User SYSTEM : _
```

6. Enter the password for the Argus Insight SYSTEM or DBA user, and press **Enter**.

```

#####
##      Copyright Oracle Corporation. All Rights Reserved.      ##
##
## Assumptions:
## (1) SYSTEM user does not own a table called ULD_SCH_TOOL_U001
## (2) Default Tablespace for SYSTEM user contains at least 32 KB free space
##
#####

Enter Password for User SYSTEM :
Connecting to SYSTEM@PRMART
Connected.

#####
##
## If user failed to connect to database then stop here and restart the tool##
##
## To stop processing close current window.
##
#####

Press Enter if the Script successfully connected as SYSTEM@PRMART
_

```

7. Verify that the script is successfully connected as <SYSTEM/DBA User Name>@<Argus Insight Database Name>, and press **Enter**.

The command prompt screen appears with the Database Name, Database Administrator User Name, Validation File Name, and the Folder Name for Log Files.

```

Connected.

#####
##
## If user failed to connect to database then stop here and restart the tool##
##
## To stop processing close current window.
##
#####

Press Enter if the Script successfully connected as SYSTEM@PRMART

Database Name           : PRMART
Database Administrator User Name : SYSTEM
Enter Validation Data File Name : ULDN_APR_AI_8.0
Folder Name for Log Files      : C:\Program Files (x86)\Oracle\Argus Insight\
t\Database\DBInstaller\ValidateSchema
Validation Difference File Name : ULDN_APR_AI_8.0_Diff.log
Validation Output File Name    : ULDN_APR_AI_8.0_Out.log

Please verify the parameters. Press ENTER to continue
_

```

8. Review the information on the command prompt screen, and press **Enter**.

The next command prompt screen appears.

```

Building temporary table to load Schema Validation Data. Please Wait...
-----

Create TABLE ULD_SCH_TOOL_U001
Table created.

-----

Loading Validation Data In Temporary Table ('SYSTEM.ULD_SCH_TOOL_U001') Using SQL LOADER
-----

#####
##
## Enter Password for user SYSTEM
##
#####

Password: _

```

9. Enter the password for the Argus Insight SYSTEM or DBA user, and press **Enter**.
10. Press **Enter** again on the next screen.
A message appears stating that the validation of the Argus Insight Database is completed.
11. Click **OK**.

When the system returns to the Schema Validation Utility dialog box:

- To check for any schema discrepancies, such as missing objects, click **View Difference Log File**.
- To see the list of errors, if any, which occurred during schema validation, click **View Output Log File**.
- To close the dialog box, click **Close**.

If Argus Insight read-only user is created, then ignore the schema validation differences, where:

- Objects are R_% views/columns
- GRANTEE is Argus Insight Read-only user

3.7 Creating a Database Link from Argus Safety to Insight Database

This link allows real-time updates of some of the values from Argus Console to Argus Insight data mart.

To create the database link from the Argus Safety database to the Argus Insight database:

1. Start the Argus Insight Schema Creation Tool.
2. Click **Argus DBLink**.
3. Connect to the Oracle Database:
 - a. In the **Password** field, enter the password for the Argus Safety SYSTEM or DBA user.
 - b. In the **Argus Safety Database** field, enter the name of your Argus Safety database.
 - c. Click **OK**.

The Argus To Insight Database Link Creation dialog box appears.

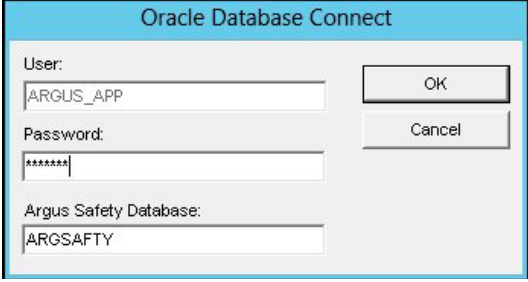
4. Complete the fields in the Argus Safety Information section as follows:

- a. In the **Schema Owner** field, select the user account that owns the Argus Safety schema.
 - b. In the **Safety Role** field, select the Argus Safety role.
 - c. In the **Read Only Role** field, select the **INSIGHT_RO_ROLE**, which was created in Argus Safety.
5. Complete the fields in the Argus Insight Information section as follows:
 - a. In the **Database** field, enter the name of the Argus Insight database.
 - b. In the **RO User** field, enter the name of the read-only user.
See step 8 (a) of the [Section 3.5, "Creating the Database Schema"](#) section (**APR_LINK_USER**).
 - c. In the **RO User Password** field, enter the password for the read-only user.
6. Click the **Log File Name** field to specify the name of the log file that will store the DBLink creation information.

You may click **Browse** to navigate to the file location, select the file, and **Save** your selection.

7. Click **OK** to create the database link.

A dialog box appears to enter the information required to connect to the database as the **ARGUS_APP** user.



The image shows a dialog box titled "Oracle Database Connect". It contains three input fields: "User:" with the text "ARGUS_APP", "Password:" with masked characters "*****", and "Argus Safety Database:" with the text "ARGSAFTY". To the right of the input fields are two buttons: "OK" and "Cancel".

8. Enter the **ARGUS_APP** password and the Argus Safety database information. Click **OK**.

A dialog box appears to enter the information to connect to the database as the Argus Safety SYSTEM or DBA user.

9. Enter the password for the Argus Safety SYSTEM or DBA user, and click **OK**.

The command prompt screen appears.

```
SQL*Plus: Release Production on Fri Jun 7 12:58:11
Copyright (c) Oracle. All rights reserved.

#####
##                                     ##
##                               Argus Insight                               ##
##                                     ##
##       Argus Insight Database Link Creation Script                       ##
##       Creates Database Link from Argus Safety to Argus Insight          ##
##       Copyright Oracle Corporation. All Rights Reserved.               ##
##                                     ##
#####

Enter Password for User ARGUS_APP : _
```

10. Enter the password for the **ARGUS_APP** user, and press **Enter**.


```

#####
##      Argus Insight Database Link Creation Script      ##
##      Creates Database Link from Argus_Safetu to Argus Insight      ##
##      Copyright Oracle Corporation. All Rights Reserved.      ##
#####

Enter Password for User ARGUS_APP :
-----
-- Connecting to ARGUS_APP
-----
Connected.

#####
##      If user failed to connect to database then stop here and restart the tool      ##
##      To stop processing close current window.      ##
#####

Press Enter if the Script successfully connected as ARGUS_APPPAS80MT
-

```

11. Verify that the script is successfully connected as <ARGUS_APP User Name>@<Argus Safety Database Name>, and press **Enter**.
12. Press **Enter** again.
Wait until a message appears stating that the Argus Safety to Argus Insight database link is created successfully along with location of the log file.
13. Click **OK**.
14. Check the log files located in the following folder for status information:
drive:\Program Files\Oracle\ArgusInsight\Database\DBInstaller
15. Click **Close** to close the Argus To Insight Database Link Creation dialog box.

3.8 Upgrading Database from Argus Insight 7.0.4 to Argus Insight 8.0

Note: The Argus Insight upgrade process will delete the CIOMS, CIOMS II Line listing and MedWatch reports entirely from the Argus Insight database. If you intend to retain this information, you must ensure that before starting the upgrade process, you have taken a back-up of this information.

To upgrade the database from Argus Insight 7.0.4 to Argus Insight 8.0:

1. Start the Argus Insight Schema Creation Tool.
2. Click **DB Upgrade**.
The Oracle Database Connect dialog box appears.
3. Connect to the Oracle Database:
 - a. In the **User** field, enter the name of the Argus Insight SYSTEM or DBA user.
 - b. In the **Password** field, enter the password for the Argus Insight SYSTEM or DBA user.
 - c. In the **Database** field, enter the name of your Argus Insight database.
 - d. Click **OK**.

The Upgrade Parameters dialog box appears.

Upgrade Parameters

Database and Upgrade Information

Database Name: PRMART

Current Database Version: <Argus Insight Current Installed Database Version>

Upgrade to Version: <Argus Insight New Upgraded Database Version>

Upgrade Directory: C:\AI SCT\DBInstaller\Upgrades

Upgrade Parameters

Enter DBA User Password:

Mart Schema Owner: APR_MART

Mart Schema Owner Password: *****

Mart Role Name: APR_ROLE

Application Owner: APR_APP

Application Owner Password: *****

Application Role Name: APR_APP_ROLE

History Schema Owner: APR_HIST

History Owner Password: *****

Mart Login User: APR_APP

Staging Schema Owner: APR_STAGE

Staging Schema Owner Password: *****

APR_USER Password: *****

Next Cancel

4. Complete the Upgrade Parameters dialog box as follows:
 - a. In the top section, verify that the database and upgrade information is correct. If the information is incorrect, click **Cancel**.
 - b. In the Upgrade Parameters section, enter the correct password for each owner and user.
 - c. In the **Mart Login User** field, select the user defined as mart login user (APR_LOGIN user).
5. Click **Next**.
The Tablespace Management dialog box appears.

| Tablespace | Current Size (Mb) | Free Space (Mb) | Free Space Needed (Mb) | Data File Location |
|--------------------|-------------------|-----------------|------------------------|--------------------------------------|
| APR_MVHOC_INDEX_01 | 56 | 55 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_MVHOC |
| APR_SESM_DATA_01 | 85 | 83.81 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_SESM_I |
| APR_SESM_INDEX_01 | 64 | 62.81 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_SESM_I |
| APR_SESM_LOB_01 | 65 | 62.63 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_SESM_I |
| APR_STAGE_DATA_01 | 160 | 158.94 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_STAGE |
| APR_STAGE_DATA_02 | 73 | 71.50 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_STAGE |
| APR_STAGE_DATA_03 | 118 | 117 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_STAGE |
| APR_STAGE_INDEX_01 | 61 | 60 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_STAGE |
| APR_STAGE_INDEX_02 | 61 | 60 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_STAGE |
| APR_STAGE_INDEX_03 | 111 | 109.88 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_STAGE |
| APR_STAGE_LOB_01 | 286 | 285 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_STAGE |
| APR_SVHOC_DATA_01 | 57 | 56 | 0 | C:\ORACLE\ORADATA\AMSB001\APR_SVHOC |
| APR_USER_DATA_01 | 87 | 86 | 1 | C:\ORACLE\ORADATA\AMSB001\APR_USER_I |
| APR_USER_INDEX_01 | 97 | 96 | 1 | C:\ORACLE\ORADATA\AMSB001\APR_USER_I |

6. Verify that all tablespaces have enough free space.

The green check mark indicates that the tablespace has enough free space.

If the tablespace does not have enough free space, increase the size of the tablespace by below mentioned methods:

- To add a new datafile to the existing tablespace, click **Add**.

A dialog box appears to add a name for the new datafile, containing the required additional space.

Note: In case no datafile exists for any tablespace, click **Create**.

A dialog box appears to create a new datafile containing the tablespace information.

- Alternatively, if you do not wish to add a new data file, the database administrator can resize the tablespace from the back-end.

After resizing, click the **Recalculate** button to re-evaluate the tablespace size and refresh the tablespace grid, as per the updated tablespace size.

Once updated, the **Add or Create** button will not be displayed and the green check mark will be displayed, indicating that the tablespace has enough free space.

7. Click **Next**.

The Argus Insight Database Upgrade dialog box appears.

8. Click **Continue** to start the upgrade process.

During the upgrade process, the system loads the factory data, and then displays a message reminding you to check the Factory_Data folder for any .BAD files.

9. Click **OK** to continue.

The system executes the upgrade scripts, displays status information during the update, and reports when the update is completed.

10. Click the **Book** icon to view the log file and check for errors.

Alternatively, you can view the log file at any time at the following location:

drive:\Program Files\Oracle\ArgusInsight\Database\Upgrades\UpgradeLog.rtf

11. Click **Finish** to close the dialog box.

12. Once you have upgraded the database from Argus Insight 7.0.4 to Argus Insight 8.0, you must create the Read-only user in the Argus Safety database using the steps given in [Section 3.5.1, "Creating Users and Roles in the Argus Safety Database"](#).

3.9 Running Additional Grant Scripts for Single DB Instance

If Argus Insight and Argus Mart are running on the same database, execute the following:

Database\Utils\am_grants.bat

-
- Note:**
- During execution of the utility, if a prompt appears to enter the user details, then enter Argus Insight DBA user and password.
 - After execution of the utility, Argus Insight schema validation file will reflect additional privileges.
-

3.10 Creating Argus Insight Read-Only User

You can create a read-only schema in Argus Insight. This schema will have read-only (SELECT) access on all the tables and views of the APR_MART and APR_HIST schema. Besides, this read-only schema can also be used for customized reporting purpose.

To create Argus Insight Read-only user:

1. From the Utils folder, double click the AI_RO_USER.bat file.
2. Enter the following inputs:
 - a. Name of the Log file
 - b. Name of Argus Insight database
 - c. Password of the SYS user
 - d. Name of Argus Insight Mart schema user (for example, APR_MART)
 - e. Name of the History schema user (for example, APR_HIST)
 - f. Name of Argus Insight Read-only user that you want to create
 - g. Password of Argus Insight Read-only user

```
#####
Argus Insight
Argus Insight Database Read Only User Creation Script
Grants necessary privileges to Insight RO User
#####

-----
--  Script:  Create Insight Read only user  --
-----

Enter Log File Name to record results      : AIReadOnly.log
Please provide following information to create Argus Insight RO user with grants
Enter TNSNAME Entry to connect to the ARGUS INSIGHT Database: AI80DB
Enter password for SYS user in AI80DB Database:
Enter Argus Insight Mart schema owner name in AI80DB Database: APR_MART
Enter Argus Insight History schema owner name in AI80DB Database: APR_HIST
Enter Read Only user to be created in AI80DB Database: AI80_ReadOnly
Enter password for AI80_ReadOnly in AI80DB Database: _
```

On successful connection to the SYS user, the script provides read-only access on objects of Argus Insight schema to the read-only user.

Configuring the Argus Insight Application

This chapter provides information about configuring the Argus Insight application and the Argus Insight scheduling service.

This chapter includes the following topics:

- [Logging In to Argus Insight for Configuration and Setup](#)
- [Configuring the Argus Insight Application Profile Switches](#)
- [Configuring Duration Value Bands](#)
- [Configuring Derivation Functions](#)
- [Configuring the Argus Insight Windows Service](#)
- [Configuring the IIS File Download Limit](#)
- [Using Export and Import to Copy Configuration Data](#)
- [Using Argus Safety to Configure Enterprises for Argus Insight](#)
- [Securing Sensitive Configuration and Operational Data](#)

4.1 Logging In to Argus Insight for Configuration and Setup

To log in to the Argus Insight application:

1. Log in with rights to a workstation from where you can access the Argus Insight application.
2. Start Internet Explorer.
3. In the Address bar, enter the following URL to start the Argus Insight:
`http://Argus_Insight_WebServer_Name:port_number/default.asp`
4. Press **Enter**.

The Argus Insight Login screen appears.



ORACLE
HEALTH SCIENCES

Argus Insight

Username

Password

Login

28-FEB-2013 05:48:21

Oracle Health Sciences Safety Suite :

- Argus Safety
- Argus Safety Japan
- Argus Affiliate
- Argus Interchange
- Argus Unblinding
- Argus Analytics
- Argus Insight
- Argus Mart
- Argus Dossier
- Argus Reconciliation
- Empirica Topics
- Empirica Signal
- Empirica Study
- WebSDM
- Siebel AECM

5. Log in to the Argus Insight application:

- In the **User Name** field, enter **admin**.
- In the **Password** field, enter the password for the admin user.
This password is the same as the password of the admin user in Argus Safety.
- Click **Login**.

Note: If you are using a Single Sign On (SSO) environment, you must ensure that SSO tools such as OAM are disabled on the Argus Insight Web Server for initial configuration. The only administrator user in Argus Insight is a non-LDAP user. A non-LDAP user cannot log in to Argus Insight with SSO tools set to Enabled.

Note: In case of a multi-tenant setup, you must ensure that the entire configuration is done using the default enterprise.

- This will help in copying the configuration to a different enterprise
 - All the global configuration is available in the default enterprise.
-

4.2 Configuring the Argus Insight Application Profile Switches

Profile switches are a collection of settings that let you configure the default behavior of the system. This section describes the profile switches that you must set to establish connectivity with your Business Intelligence tool and to run the initial ETL.

For detailed information about all the profile switches, see:

- *Oracle Argus Insight CMN Profile Enterprise Table Guide* (CMN_PROFILE_ENTERPRISE.pdf)
- *Oracle Argus Insight CMN Profile Global Table Guide* (CMN_PROFILE_GLOBAL.pdf)

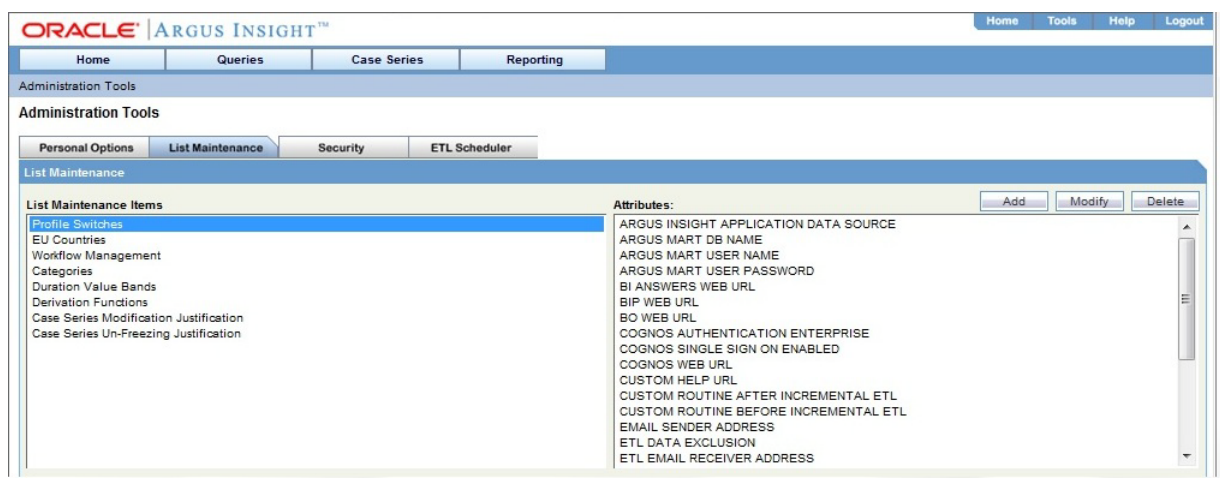
4.2.1 Accessing and Modifying the Profile Switches

To access and modify the Argus Insight profile switches:

1. Log in to the Argus Insight application.
2. On the Argus Insight home page, from the upper-right corner, click the **Tools** tab.
The Administration Tools screen appears.
3. Click the **List Maintenance** tab.
4. From the List Maintenance Items group, select **Profile Switches**.

The Attributes group is updated with the profile switches that you may configure.
See [Figure 4–1](#).

Figure 4–1 List Maintenance Tab with the Profile Switches



Note: When the Argus Insight Database Source profile switch is set to **Argus Mart**, then in the List Maintenance section, only **Profile Switches** and **Case Series Modification Justification** list maintenance items are available.

For more information on this profile switch, see [Section 4.2.4, "Setting the Attributes Specific ONLY to Argus Mart"](#).

4.2.2 Setting the Populate Data Attributes

You may control data population based on data attributes.

The following is the list of profile switch along with their value required to be set to populate data attributes.

Table 4–1 Populate Data Attribute-Value set

| Attribute | Value |
|-------------------------|---|
| POPULATE AFFILIATE DATA | 0 — Do not bring any affiliate data into the Insight data mart. 1 — Bring all affiliate data into the Insight data mart. |

Table 4–1 (Cont.) Populate Data Attribute-Value set

| Attribute | Value |
|----------------------------------|---|
| POPULATE INTERCHANGE DATA | <p>0 — Do not bring any interchange data into the Insight data mart.</p> <p>1— Bring all interchange data into the Insight data mart.</p> <p>2 — Bring only the SAFETYREPORT, MESSAGES, and EDI_INFO tables data into the Insight data mart.</p> |
| POPULATE CASE/CONFIGURATION DATA | <p>0 — Populate configuration data only.</p> <p>1 — Populate all the data (both case and configuration data).</p> |
| LEGACY REPORTS CONFIGURATION | <p>0 — Configuration items are not visible.</p> <p>1— Configuration items are visible.</p> <p>Note: If Legacy Reports Configuration switch is set to 1, then legacy reports switches becomes available for obsolete reports, and you must configure the following switches:</p> <ul style="list-style-type: none"> ■ POPULATE NARRATIVE LANGUAGES TABLE ■ COMPANY LOGO PATH ■ DAYS TO LOCK ■ UDN COLUMN FOR SUPPLIER NAME ■ FOLLOW-UP ACTION CODE ■ POPULATE DLL SLL REPORTS TABLE DATA <p>To configure these switches, refer to Argus Insight 7.0.2 Installation Guide.</p> |

To set the data attributes:

1. On the Administration Tools screen, click the **List Maintenance** tab.
2. From the List Maintenance Items group, select **Profile Switches**.
3. From the Attributes group, select a profile switch, and click **Modify**.

The Modify Attributes dialog box appears.

Note: See [Table 4–1, "Populate Data Attribute-Value set"](#).

4. In the **Value** field, enter a numeric value, and click **OK**.

The profile switch is set and you return to List Maintenance tab.

4.2.3 Setting the Email Attributes

You may configure the profile switches that relate to sending and receiving email after an extract, transform, and load (ETL) operation has completed, as well as sending email for scheduled reports.

The following is the list of profile switch along with their value required to be set for email messages and delivery.

Table 4–2 Email Specific Attribute-Value set

| Attribute | Value |
|--|---|
| ETL EMAIL SETUP | <p>0 — Send no email message after an ETL operation.</p> <p>1 — Send an email message only if an initial or incremental ETL fails.</p> <p>2 — Send an email message only if an initial or incremental ETL succeeds.</p> <p>3 — Send an email message after any initial or incremental ETL (failure or success).</p> |
| ETL EMAIL RECEIVER ADDRESS | <p>Specify the email address of each administrator who should receive email status messages of the ETL process. Use a semi-colon to separate each entry.</p> <p>If the Value field blank, then no email messages are sent.</p> |
| EMAIL SENDER ADDRESS | <p>Specify the email address of each administrator who should receive email status messages of the ETL process. Use a semi-colon to separate each entry.</p> <p>If the Value field blank, then no email messages are sent.</p> |
| FAILED RECIPIENTS STATUS EMAIL ADDRESS | <p>Specify the email address of the user who will receive information about undeliverable emails.</p> |

To configure the attributes related to email messages and delivery:

1. On the Administration Tools screen, click the **List Maintenance** tab.
2. From the List Maintenance Items group, select **Profile Switches**.
3. From the Attributes group, select a profile switch, and click **Modify**.

The Modify Attributes dialog box appears.

Note: See [Table 4–2, "Email Specific Attribute-Value set"](#).

4. In the **Value** field, enter a value, and click **OK**.

The profile switch is set and you return to List Maintenance tab.

4.2.4 Setting the Attributes Specific ONLY to Argus Mart

Argus Insight supports queries for analysis of the historical case data based on specific date/time through Argus Mart. To enable access to this data in Argus Mart, you need to set specific attributes.

The following is the list of profile switch along with their value required to be set to populate Argus Insight data into Argus Mart database.

Table 4–3 Argus Mart Specific Attribute-Value set

| Attribute | Value |
|---------------------------------------|--|
| Argus Insight Application Data Source | <p>Enables you to configure the data source for Argus Insight. You may run your queries for Argus Insight or Argus Mart depending on the value configured in this switch.</p> <p>Argus Mart — Enable queries on Argus Mart data source only.</p> <p>Insight Mart — Enable queries on Argus Insight data source only.</p> <p>Both (Insight Mart and Argus Mart) — You may choose between Insight Mart and Argus Mart data sources for creating and executing your queries. All the queries and case series created on these data sources can be identified in the application.</p> |
| ARGUSMARTDBNAME | Specify the database instance name for the Argus Mart data mart. This information enables to connect Argus Insight with Argus Mart database. |
| ARGUS MART USER NAME | Specify the schema user created for Argus Insight in Argus Mart database. This user may perform all the background functions from Argus Insight application to Argus Mart database including querying and reporting. |
| ARGUS MART USER PASSWORD | Specify the password of the schema user created for Argus Insight in Argus Mart database that is, the password of user configured in ARGUS MART USER NAME. |
| ENABLE_AI_PROCESSING | <p>Note: Use Argus Safety Console to enable this profile switch.</p> <p>This profile switch must be set to Yes to link Argus Insight database to Argus Mart database.</p> <p>Yes — Enable Argus Insight Processing for Argus Mart.</p> <p>No — Disable Argus Insight Processing for Argus Mart.</p> |

Note: These profile switches are optional and should be configured only if you want to run Advanced Conditions on Argus Mart database.

Argus Mart database TNS should be added in the Argus Insight Web Server TNS and Argus Insight Database Server TNS.

Argus Insight Database Server TNS should be added in the Argus Mart Database TNS.

To set these attributes:

1. On the Administration Tools screen, click the **List Maintenance** tab.
2. From the List Maintenance Items group, select **Profile Switches**.
3. From the Attributes group, select a profile switch, and click **Modify**.

The Modify Attributes dialog box appears.

Note: See [Table 4–3, "Argus Mart Specific Attribute-Value set"](#).

4. In the **Value** field, enter a value, and click **OK**.

The profile switch is set and you return to List Maintenance tab.

5. Log on to Argus Safety Console in separate window, and set ENABLE_AI_PROCESSING profile switch to **Yes**.

4.2.5 Setting the Attributes Specific ONLY to BIP

If you are using BIP as your Business Intelligence tool with Argus Insight, you need to set the following BIP-specific attributes:

- BIP WEB URL
- KEEP REPORT DATA

To define the attributes required for BIP:

1. On the Administration Tools page, click the **List Maintenance** tab.
2. From the List Maintenance Items group, select **Profile Switches**.
3. From the Attributes group, select **BIP WEB URL**.

- a. Click **Modify**.

The Modify Attribute dialog box appears.

- b. In the **Value** field, enter the name of the BIP Web URL to open the BIP home page.

This URL can be the BI Publisher URL for standalone BI Publisher server or the Load Balancer URL configured for multiple BI Publisher servers. If BI Publisher is configured for SSL, you must use https with the URL. For example:

https://<server name>:<Port Number>/xmlpserver

- c. Click **OK** to save the changes and return to the List Maintenance tab.

4. From the Attributes group, select **KEEP REPORT DATA**.

This attribute is used to determine if the report log tables needs to be populated or not.

- a. Click **Modify**.

The Modify Attribute dialog box appears.

- b. In the **Value** field, enter **Yes** or **No**.

The value **Yes** denotes that the Report Log tables should be populated. The value **No** denotes that the Report Log tables should not be populated

- c. Click **OK** to save the changes and return to the List Maintenance tab.

4.2.6 Setting the Attributes Specific ONLY to OBIEE

If you are using OBIEE with Argus Insight, you need to set the OBIEE specific attributes:

- BI ANSWERS WEB URL

To define the attributes required for OBIEE:

1. On the Administration Tools screen, click the **List Maintenance** tab.
2. From the List Maintenance Items group, select **Profile Switches**.
3. From the Attributes group, select BI ANSWERS WEB URL, and click **Modify**.

The Modify Attributes dialog box appears.

4. In the **Value** field, enter the path for the BI ANSWERS WEB URL.

For example, this path can be the OBIEE URL:

https://<server name>:<Port Number>/analytics

5. Click **OK**.

The profile switch is set and you return to List Maintenance tab.

4.2.7 Setting the Attributes Specific ONLY to BusinessObjects

If you are using BusinessObjects as your Business Intelligence tool with Argus Insight, you need to set the attributes for BusinessObjects Servers for **BusinessObjects configurations only**.

To define the attributes required for the **BusinessObjects Servers**:

1. On the Administration Tools page, click the **List Maintenance** tab.
2. From the List Maintenance Items group, select **Profile Switches**.
3. Define the BusinessObjects Server Web URL that Argus Insight uses:

- a. From the Attributes group, select **BO WEB URL**.

- b. Click **Modify**.

The Modify Attribute dialog box appears.

- c. In the **Value** field, enter either the IP address or the host name of the BusinessObjects Server.

In addition, specify the cluster name if you are using the BusinessObjects clustering feature.

Note: In the case of a single-server environment (that is, Argus Insight and BusinessObjects are hosted on the same server), you must enter the IP address to avoid problems when accessing the BusinessObjects home page. These problems may be caused due to the session interference of Argus Insight and BusinessObjects web application.

- d. Click **OK** to save the changes and return to the List Maintenance tab.

4.2.8 Setting the Attributes Specific ONLY to Cognos

If you are using Cognos as your Business Intelligence tool with Argus Insight, you need to set the Cognos-specific attributes.

The following is the list of profile switch along with their value required to be set for Cognos.

Table 4–4 Cognos Specific Attribute-Value set

| Attribute | Value |
|--|---|
| COGNOS AUTHENTICATION ENTERPRISE | Select the Enterprise Short Name from which all users are authenticated for Cognos login. |

Table 4–4 (Cont.) Cognos Specific Attribute-Value set

| Attribute | Value |
|-------------------------------------|--|
| COGNOS WEB URL | Specify the name of the Cognos Web URL for opening the Cognos home page. This URL can be the Cognos URL for standalone Cognos server or the Load Balancer URL configured for multiple Cognos servers. If Cognos is configured for SSL, you must use https with the URL. Example: http://<server name>/Cognos102 |
| POPULATE DLL SLL REPORTS TABLE DATA | 0 — Do not populate the RPT_CASE_EVENT_PRODUCT table, which is required for DLL and SLL reports 1 — Populate the RPT_CASE_EVENT_PRODUCT table, which is required for DLL and SLL reports Note: This attribute is obsolete in case of a fresh installation of Argus Insight 8.0. This attribute should be configured for the Detail Line Listing Report and the Simple Line Listing Report. |
| COGNOS SINGLE SIGN ON ENABLED | 1 — Cognos single sign on enabled 0 — Cognos single sign on disabled |

Note: You must configure the COGNOS AUTHENTICATION ENTERPRISE profile switch for Cognos integration. The default value of this switch is Null.

To define the attributes required for Cognos:

1. On the Administration Tools screen, click the **List Maintenance** tab.
2. From the List Maintenance Items group, select **Profile Switches**.
3. From the Attributes group, select a profile switch, and click **Modify**.

The Modify Attributes dialog box appears.

Note: See [Table 4–4, "Cognos Specific Attribute-Value set"](#).

4. In the **Value** field, enter a value, and click **OK**.

The profile switch is set and you return to List Maintenance tab.

4.3 Configuring Duration Value Bands

In Argus Insight, you can map the following time values (entered in Argus Safety) to specific ranges called Duration Value Bands:

- Time to Onset from First Dose
- Time to Onset from Last Dose

You set the value of these fields in Argus Safety by navigating to Product tab, Drug Duration of Administration, and Events Tab.

By mapping the time values to Duration Value Bands in Argus Insight, you can specify query criteria based on ranges instead of specific values for the *Time to Onset* fields listed above.

Using the Duration Value Bands item on the List Maintenance tab, you can configure duration value bands in hours, days, weeks, months, and years. For each band, you can specify multiple ranges by entering minimum and maximum values for each range item. Any value that falls within a configured range will map to that range.

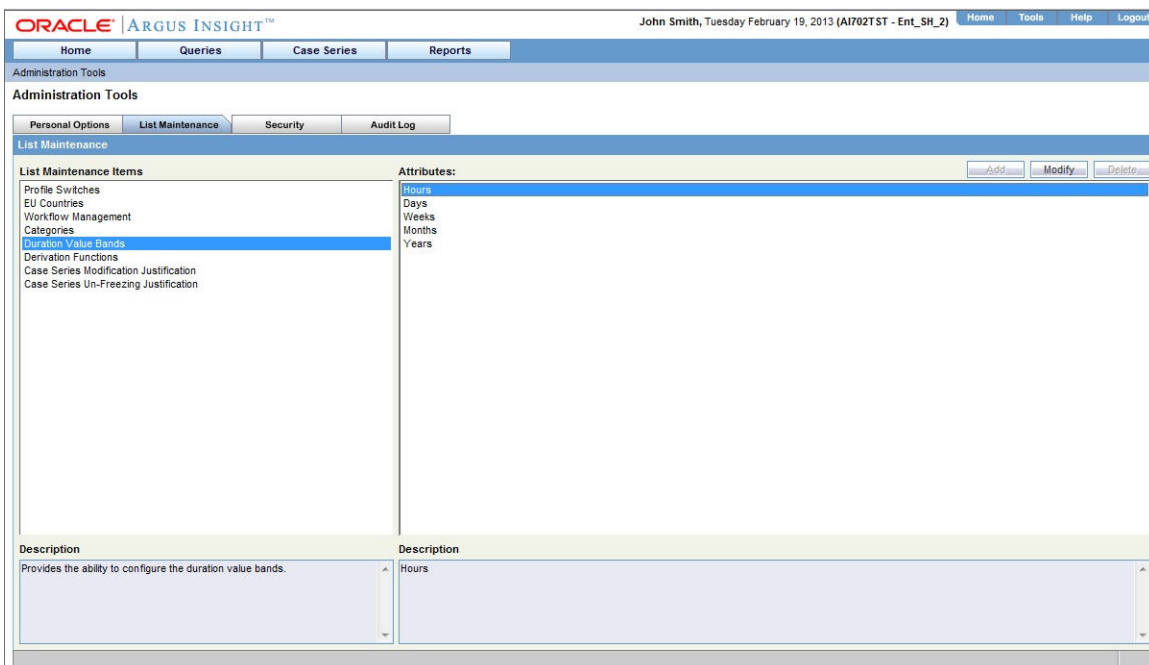
Note: Duration Value Band configuration must be done before running the Initial ETL.

If Duration Value Bands are modified after Initial ETL, you must re-run the Initial ETL.

To modify a duration value band:

1. On the Argus Insight home page, click the **Tools** tab from the upper-right corner.
The Administration Tools screen appears.
2. Click the **List Maintenance** tab.
3. From the List Maintenance Items group, select **Duration Value Bands**.

The Attributes group displays the valid bands (Hours, Days, Weeks, Months, and Years). You can modify the values of these bands. You cannot, however, add more bands or delete an existing band.



Note: When the Argus Insight Database Source profile switch is set to **Argus Mart**, then in the List Maintenance section, only **Profile Switches** and **Case Series Modification Justification** list maintenance items are available.

For more information on this profile switch, see [Section 4.2.4, "Setting the Attributes Specific ONLY to Argus Mart"](#).

4. Select the duration value band (Hours, Days, Weeks, Months, Years) you want to change, and click **Modify**.

The Duration Value Bands Configuration dialog box appears with the factory-configured ranges.

Note that:

- The Label column represents the name of the range.
- The Lower Range (\geq) and Higher Range ($<$) columns contain the minimum and maximum values, respectively.
- The highest value band includes all values that are greater than the highest range value specified.

| Band | Label | Lower Range (\geq) | Higher Range ($<$) |
|-------|-----------|------------------------|----------------------|
| Hours | <1 | 0 | 1 |
| | 1 to <2 | 1 | 2 |
| | 2 to <4 | 2 | 4 |
| | 4 to <6 | 4 | 6 |
| | 6 to <8 | 6 | 8 |
| | 8 to <10 | 8 | 10 |
| | 10 to <12 | 10 | 12 |
| | 12 to <24 | 12 | 24 |
| | ≥ 24 | 24 | |

5. Modify the values:

- To modify an existing range, edit the values in the **Lower Range (\geq)** and **Higher Range ($<$)** fields.
- To add a range, scroll to the current highest range and click in the blank **Higher Range ($<$)** field.

Enter a value greater than the current highest range, and press **Tab** to add a new row.

- To delete an existing range, click the **Delete** icon next to the row.

Note that you cannot delete the lowest band.

If you delete an intermediate range, the system automatically converts the highest value of the deleted range to the lowest value in the next range. However, the system does not change the range labels.

6. Click **OK** to save the changes.

4.4 Configuring Derivation Functions

You can create a new List Maintenance item and derive specific cases to this item based on case attributes. These attributes are supplied to the system as SQL.

For example:

1. Create a new List Maintenance item called **Report Type 1**, and derive all the cases with the **Report Type** attribute defined as **Spontaneous, Literature, or Compassionate Use**.

The Report Type 1 appears as an option in the query tool interface corresponding to the Report Type attribute.

2. From the Report Type, select Report Type 1, and execute the query.

Cases with the Report Type attribute specified as Spontaneous, Literature, or Compassionate Use are returned.

You can specify more than one attribute.

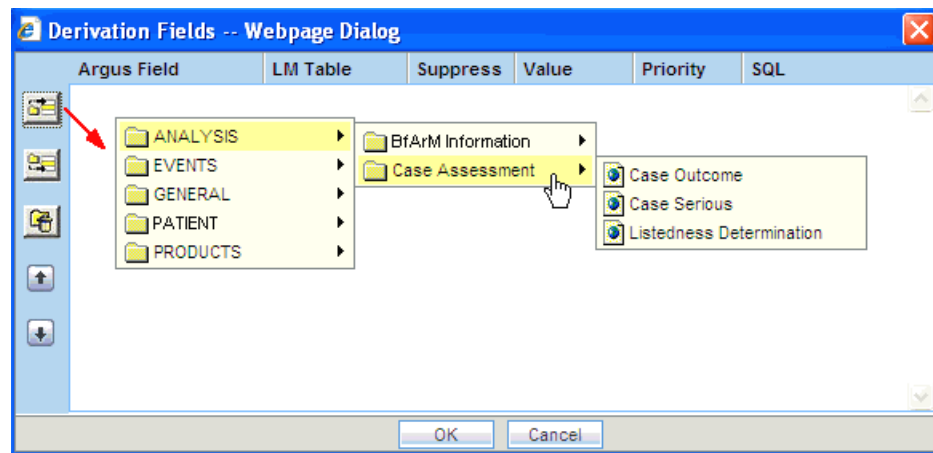
For example, create a further specialized List Maintenance item called **Report Type 1 US**, and derive all the cases that have the **Report Type** attribute defined as **Spontaneous, Literature, or Compassionate Use**, *and* the **Country of Incidence** attribute defined as **United States**.

Note: There can be situations where two different List Maintenance items you create contain similar attributes in the SQL criteria. In this case, you can assign a priority level to individual List Maintenance items. The priority level determines which List Maintenance item SQL executes first.

4.4.1 Opening the Derivation Fields Dialog Box

To open the Derivation Fields dialog box and configure derivation functions:






1. On Argus Insight home page, click the **Tools** tab from the upper-right corner.
The Administration Tools screen appears.
2. Click the **List Maintenance** tab.
3. From the List Maintenance Items group, select **Derivation Functions**.
4. From the Attributes group, select **All Derivations**, and click **Modify**.
The Derivation Fields dialog box appears.



4.4.2 Icons in the Derivation Fields Dialog Box

Table 4–5 describes the icons in the Derivation Fields dialog box that you can use to add, delete, and reorder derivation field elements (rows).

Table 4–5 Icons in the Derivation Fields Dialog Box

| Click... | To... |
|---|---|
|  | Add a derivation field element (row) above the currently selected row |
|  | Add a derivation field element (row) below the currently selected row |
|  | Delete the currently selected derivation field element (row) |
|  | Move the selected row up |
|  | Move the selected row down |

4.4.3 Field Mapping Derivation Rules

Table 4–6 lists the available field mapping derivation rules for Argus Insight.

Table 4–6 Field Mapping Derivation Rules

| Function Category | Function Sub-category | Argus Insight Field |
|-------------------|-----------------------|--|
| ANALYSIS | BfArM Information | Causality |
| ANALYSIS | Case Assessment | Case Outcome Case Serious Listedness Determination |
| EVENTS | Event Information | Lack of Efficacy |
| GENERAL | General Information | Report Type Derived Pregnancy |
| PATIENT | Patient Information | Age Group Gender Patient weight BMI desc |

Table 4–6 (Cont.) Field Mapping Derivation Rules

| Function Category | Function Sub-category | Argus Insight Field |
|-------------------|-----------------------|---|
| PRODUCTS | Product Drug | Derived Drug Abuse Derived Drug Interaction Derived Overdose Last daily dose |

Note: Causality, Report Type, Age Group, and Last daily dose are comma-separated derivation rules.

4.4.4 Fields and Check Boxes in the Derivation Fields Dialog Box

This section describes the fields and check boxes in the Derivation Fields dialog box.

4.4.4.1 LM Table

The LM Table field is the table name of the selected Argus field (that is, automatically populated).

4.4.4.2 Suppress

The Suppress check box is available for fields associated with the list maintenance data. When suppress is enabled for a field, the corresponding list maintenance values that are not present in any case are deleted and thus not available for querying.

Note: The Suppress check box is applicable *only if* the condition specified in the SQL text box covers all the cases having the selected List Maintenance field.

4.4.4.3 Value

The Value field captures the value for the new derivation field. For the following rules, you must enter the new value for the rule as a comma-separated value:

- Causality
- Report Type
- Age Group
- Last Daily Dose

Note: Make sure to enter the values for these rules as defined in the following sections. Unexpected results and/or ETL errors may result if the values are not entered as specified.

Causality Rule

Parameters: VALUE, REPORTABILITY

where:

VALUE = New value for the rule

REPORTABILITY = Lower value of the group

Example: NewCausality,1

Report Type Rule

Parameters: VALUE, INC_LIT, INC_TRIAL, ABRV

where:

VALUE = New value for the rule

INC_LIT = 1 if Literature Report Type else 0

INC_TRIAL = 1 if Clinical Trial Report Type else 0

ABRV = A 3-letter abbreviation for the Report Type

Example: NewReportType,0,1,NRT

Age Group Rule

Parameters: VALUE, GROUP_LOW, GROUP_HIGH

where:

VALUE = New value for the rule

GROUP_LOW = Lowest value of the age group

GROUP_HIGH = Highest value of the age group

Example: NewAgeGroup,25,50

If you do not want to specify the High Value, then the comma is mandatory in the end.

Example: Unknown,70,

Last Daily Dose Rule

Parameters: VALUE, DAILY_DOSE_SORTING_ORDER

where:

VALUE = New value for the rule

DAILY_DOSE_SORTING_ORDER = 1 or 2 or 3 and so on to define the sorting order if there is more than 1 rule for the Last Daily Dose field

Examples: 1 -> 0to1,1; 2 -> 2to3,2 3 -> 5to8,3

4.4.4.4 Priority

The Priority field captures the priority for a list of derivation rules applied to a single List Maintenance field. The value should be from 1 to 255.

Note: The priority for derivation rules applicable to a single List Maintenance field should be unique.

4.4.4.5 SQL

The SQL field specifies the SQL statement to capture the cases for which the derivation rule is applicable.

Note: The SQL statement must follow the correct syntax.

The system does not validate the length of the new values against the database. Make sure that new values being inserted into the Insight data mart do not exceed the limit defined in the database.

Guidelines for correct syntax:

- The SQL query configured against a rule should not contain the table name. It should contain only the primary key column name(s) of the field in the SELECT clause. For example:

Correct: SELECT CASE_ID FROM RPT_CASE WHERE...

Incorrect: SELECT RPT_CASE.CASE_ID FROM RPT_CASE WHERE...

- Make sure that there is only one space after the SELECT clause in the SQL query. For example:

Correct: SELECT CASE_ID, SEQ_NUM FROM RPT_PRODUCT WHERE...

Incorrect: SELECT CASE_ID, SEQ_NUM FROM RPT_PRODUCT WHERE...

- Make sure that no Oracle keyword (such as DISTINCT) is used after the SELECT clause in the SQL query. For example:

Correct: SELECT CASE_ID, SEQ_NUM FROM RPT_PRODUCT WHERE...

Incorrect: SELECT DISTINCT CASE_ID, SEQ_NUM FROM RPT_PRODUCT WHERE...

4.5 Configuring the Argus Insight Windows Service

To configure the Argus Insight Windows service:

1. Log in to the Argus Insight Web Server.
2. Click **Start**, and select **Run**.
3. In the text box, enter **services.msc**, and click **OK**.

The Services screen appears.

4. Right-click **Argus Insight Service**, and select **Properties**.

The Argus Insight Service Properties dialog box appears.

5. Set the value of the **Startup type** field to **Automatic**.
6. Click **Start** to start the Argus Insight Service.
7. Click **OK** to apply the changes.

Note: To change the interval of different service tasks, modify the entries in the Service.config file located in the Bin folder of Argus Insight. All the timestamps in the Service.config file are specified in seconds.

IMPORTANT! Ensure that the user who runs this service has administrator privileges.

4.6 Configuring the IIS File Download Limit

To configure the IIS file download limit for Windows 2012:

1. Go to the Internet Information Services (IIS) Manager.
2. Double-click **ASP** in the right pane.

The ASP dialog box appears.

3. Expand **Limit Properties** and change the **Response Buffering Limit** from 4 MB (default) to a large value such as 200000000 (200 MB).
4. From Actions in the left pane, click **Apply**.
5. Restart the IIS service.
 - a. Click **Start**, and select **Run**.
 - b. In the text box, enter **iisreset -start**.
 - c. Click **OK**.

4.6.1 Configuring the Maximum Requesting Entity Body Limit

Defining a value for the **Maximum Requesting Entity Body Limit** setting is optional.

You may need to set this value only if you use custom SQL scripts in advanced conditions and only if the scripts have more than 70,000 characters.

If you receive AJAX errors when saving your custom SQL scripts that have more than 70,000 characters, you can increase the value of the **Maximum Requesting Entity Body Limit** setting in the IIS. Increasing the setting ensures that the ASP can post that much data onto the server.

To change the value of the **Maximum Requesting Entity Body Limit** setting:

1. Go to the Internet Information Services (IIS) Manager.
2. Double-click **ASP** in the right pane.
The ASP dialog box appears.
3. Expand **Limit Properties** and change the **Maximum Requesting Entity Body Limit** from 200000 Bytes (default) to a large value (preferably 5000000 Bytes).
4. From Actions in the left pane, click **Apply**.
5. Restart the IIS service.
 - a. Click **Start**, and select **Run**.
 - b. In the text box, enter **iisreset -start**.
 - c. Click **OK**.

4.7 Using Export and Import to Copy Configuration Data

Before configuring export and import functions, be aware of the following:

- Before importing or exporting to or from a network drive, verify that you have mapped the network drive. This tool does not support direct access to network drives.
- Before copying Argus Data, incremental ETL should be completed on Source Insight Database from Source Argus.
- It is assumed that the configuration of the instance of Argus used to run Initial and Incremental ETL on the source Argus Insight data mart will also be copied and applied on the new Argus Instance which will be associated with the new Argus Insight data mart.
- Data must be imported after loading Factory Data and before running Initial ETL on destination environment.

- In a multi-tenant environment, you must ensure that all the enterprises which are part of the source Argus Insight database, have been created in the Target Argus Insight database.

4.7.1 Exporting Data

To export data:

1. Start the Argus Insight Schema Creation Tool.
 2. Click **Export Data**.
- The Export Utility dialog box appears.
3. Enter the name of the **Schema Owner**, the **Schema Password**, and the name of **Database**.
 4. Enter the complete directory path and file name for the export dump file. You can:
- Keep the default file location and name as specified.
 - Click the ellipsis button (...) next to the **Export Dump File Name** field.

The Export Dump File dialog box appears.

i. Navigate to the appropriate location.

ii. Enter the file name in the **File name** field, and click **Save**.

5. Enter the complete directory path and file name for the log file. You can:
- Keep the default file location and name as specified.
 - Click the ellipsis button (...) next to the **Log File Name** field.

The Log File dialog box appears.

i. Navigate to the appropriate location.

ii. Enter the file name in the **File name** field, and click **Save**.

6. Click **Export** to continue with the data export.

The Import Dump Information dialog box appears.



7. Verify the list of files, and Click **OK**.

The command prompt screen appears.

```
SQL*Plus: Release Production on Fri Jun 7 14:27:37
Copyright (c) Oracle. All rights reserved.
Enter Password for User APR_MART : _
```

8. Enter the password for the APR_MART user, and press **Enter**.

```
Enter Password for User APR_MART :
#####
##
##                               Argus Insight                               ##
##      Module - Export Data from Source Database                          ##
##      Preferably Validate Schema on Source Database before proceeding    ##
##      Copyright Oracle Corporation (All Rights Reserved)                 ##
##
#####

Connecting as APR_MART@A180
Connected.

#####
##
## If user failed to connect to database then stop here and restart the tool.##
##
## To stop processing close current window.                               ##
##
#####

Press Enter if the Script successfully connected as APR_MART@A180
_
```

9. Verify that the script is successfully connected as <APR_MART User Name>@<Argus Insight Database Name>, and press **Enter**.
The command prompt screen with the Argus Insight Mart details appears.
10. Verify the details mentioned on the command prompt screen, and press **Enter**.

```
#Temporary Sequence table creation and population started
#####

#####
#Temporary Sequence table creation and population completed
#####

#####
# Exporting Source Data
# Ignore error EXP-00011 if table is empty
# Enter password for APR_MART
#####
'C:\Program Files (x86)\Oracle\ArgusInsight\Database\DBInstaller\Copy_Config_Data\insight_export_tables.par' FILE='C:\Program Files (x86)\Oracle\ArgusInsight\Database\DBInstaller\Copy_Config_Data\Export.dmp' LOG='C:\Program Files (x86)\Oracle\ArgusInsight\Database\DBInstaller\Copy_Config_Data\Export_log.log'
Note:

Export: Release - Production on Fri Jun 7 14:28:44
Copyright (c) Oracle and/or its affiliates. All rights reserved.
Password: _
```

11. Enter the password for the APR_MART user, and press **Enter**.
A **commit complete** message along with the confirmation that the data has been exported successfully appears.
12. Press **Enter** to continue.
A message appears when the Argus Insight configuration data is exported.
13. Click **OK** to close the dialog box.
Be sure to review the log files for information about the export as well as export errors, if any.

Log files are in the following folder:

\Program Files\Oracle\ArgusInsight\Database\DBInstaller\Copy_Config_Data

4.7.2 Importing Data

To import data:

1. Start the Argus Insight Schema Creation Tool.

2. Click **Import Data**.

The Import Utility dialog box appears.

3. Enter the name of the **Schema Owner**, the **Schema Password**, and the name of **Database**.

4. Enter the complete directory path and file name for the dump file. You can:

- Keep the default file location and name as specified.
- Click the ellipsis button (...) next to the **Dump File Name** field.

The Import Dump File dialog box appears.

i. Navigate to the appropriate location.

ii. Enter the file name in the **File name** field, and click **Open**.

5. Enter the complete directory path and file name for the log file. You can:

- Keep the default file location and name as specified.
- Click the ellipsis button (...) next to the **Log File Name** field.

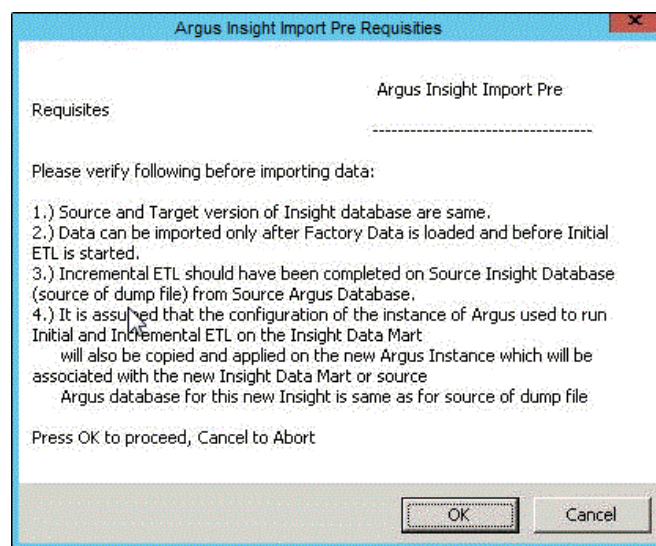
The Log File dialog box appears.

i. Navigate to the appropriate location.

ii. Enter the file name in the **File name** field, and click **Open**.

6. Click **Import** to continue with the data import.

A list of prerequisites to importing data appears.



7. Review the prerequisites and verify that your system complies with the requirements.

- If you have not met all the prerequisites, click **Cancel** to stop the data import. Complete all prerequisites before restarting the data import process.
- If you have met all the prerequisites, click **OK**.

The command prompt screen appears.

```
SQL*Plus: Release Production on Fri Jun 7 14:34:27
Copyright (c) Oracle. All rights reserved.
Enter Password for User APR_MART : _
```

8. Enter the password for the **APR_MART** user, and press **Enter**.

```
Enter Password for User APR_MART :
#####
##                                     ##
##                               Argus Insight                               ##
##      Module - Import Data into Target Database                          ##
##  Preferably Validate Schema on Source Database before proceeding         ##
##      Copyright Oracle Corporation (All Rights Reserved)                  ##
##                                     ##
#####
Connecting as APR_MART@PRMART
Connected.
#####
##                                     ##
## If user failed to connect to database then stop here and restart the tool. ##
##                                     ##
## To stop processing close current window.                                ##
##                                     ##
#####
Press Enter if the Script successfully connected as APR_MART@PRMART
_
```

9. Verify that the script is successfully connected as <APR_MART User Name>@<Argus Insight Database Name>, and press **Enter**.

The command prompt screen appears with the Argus Insight Mart details.

10. Verify the details on the command prompt screen, and press **Enter**.

```
PL/SQL procedure successfully completed.
#####
# Disabling all the APR_MART Triggers ..
#####
PL/SQL procedure successfully completed.
#####
# Truncating or Delete the tables to be imported...
#####
Commit complete.
#####
# Importing Tables
# Enter password for APR_MART
#####
Import: Release - Production on Fri Jun 7 14:35:23
Copyright (c) Oracle and/or its affiliates. All rights reserved.
Password: _
```

11. Enter the password for the **APR_MART** user, and press **Enter**.

A confirmation message appears stating that the data has been imported successfully along with the location of the log file.

12. Press **Enter** to continue.

Be sure to review the log files for information about the import as well as import errors, if any.

- Log files are in the following folder:

Using Argus Safety to configure enterprises for Argus Insight is supported in multi-tenant installations only.

See the Global Enterprise Management section of the *Argus Safety Installation Guide* for detailed steps on logging and accessing Argus Safety global home page.

1. Log in to the Global Enterprise Management portlet.
2. From the Enterprises folder, select an enterprise from the left pane.

Browser

Contains

Filter

Displaying Rows 1-6 (6)

Enterprises

21ENT04

21ENT05

21ENT07

ENT1

ENT4

Enterprise1

Enterprise2

Enterprise Name

Enterprise2

Enterprise Short Name

Enterprise2

Active

☒

Contact Information

Title

Enterprise

First Name

Enterprise2

Middle Name

Enterprise2

Last Name

Address

City

State/Province

Postal Code

Country

Department

Phone

Fax

Email Address

Notes

Add New Enterprise

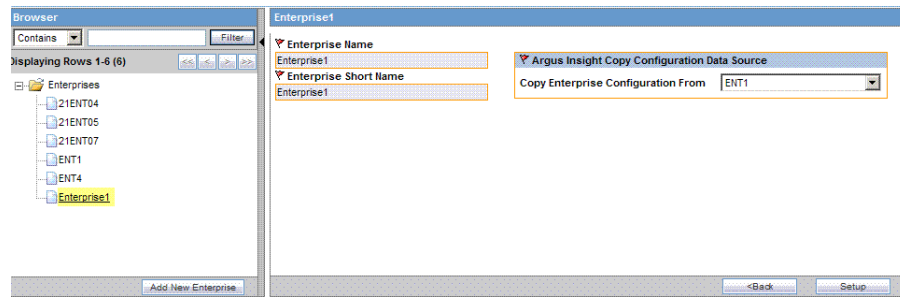
Copy Enterprise to Insight

Back

Next

- Note that the Copy Enterprise to Insight button:

- The following screen appears.



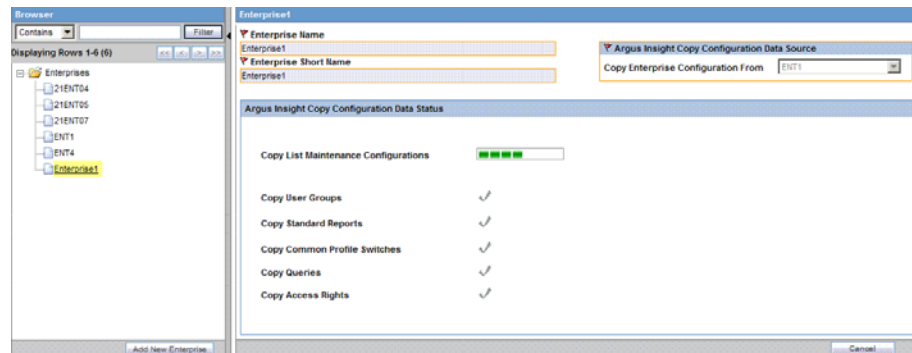
4. In the **Copy Enterprise Configuration From** field, select the source enterprise from which the information will be copied.

Note that the drop-down list includes only those enterprises that meet the following two conditions:

- The enterprise has already been created in Argus Insight.
- You have been assigned Copy Configuration privileges for the enterprise.

5. Click **Setup**.

The process to copy the configuration begins and a status information appears throughout the process.



6. Click **Finish** to complete the creation of the enterprise in Argus Insight.

4.9 Securing Sensitive Configuration and Operational Data

For security reasons, you should configure permission settings for certain files and folders on the Argus Insight Web Server. The permission settings ensure that only the IIS user can access these files. Local system login accounts that are not part of the Administrators group cannot make changes to the files.

Windows Directory File

For the user under which IIS is running, the **ai.ini** file requires a permission of **Full Control**.

Shared Folders

For the user under which IIS is running, the following folders require a permission of **Full Control**:

- CacheTemp
- ScheduledReports

- PDFReports
- ASP
- Bin

Extracting, Transforming, and Loading Data

This chapter describes the steps required to run and work with the initial extract, transform, and load (ETL) process.

This chapter includes the following topics:

- [Prerequisites, Cautions, and Warnings](#)
- [Running the Initial ETL](#)
- [Running the Initial ETL Again](#)
- [Processing a Failed ETL](#)
- [Restarting the Initial ETL Process](#)

5.1 Prerequisites, Cautions, and Warnings

Before running the Initial ETL, ensure:

- The Auto extend is set to ON for all the data files in the database that are related to staging and Insight Mart.
- The POPULATE CASE/CONFIGURATION DATA profile switch is configured to the desired value.

In addition, note that:

- Since the initial ETL requires a huge amount of temporary space, set the temporary space to 100 GB to prevent data errors. After completing the Initial ETL, reduce the temporary space to 30 GB.
- After the Initial ETL completes, the balancing log may show differences between the Argus (Stage) and Insight Mart table counts. This is because of the derivation rules applied to the Insight data mart.
- The system may display the following message:

Warning !!! - Could not locate MedDRA-J User in the Argus Database.

Ignore this warning for all MedDRA tables.

- **Do not** run incremental ETL for more than 50,000 cases. Run the Initial ETL again if the number of cases exceeds 50,000.
- The Argus Insight ETL will not populate the Argus Mart database.

Refer to the *Oracle Argus Mart Installation and Administration Guide* for more information on the Argus Mart ETL.

5.2 Running the Initial ETL

To run the initial ETL:

1. Log in to the Argus Insight Web Server as a user with administrator privileges.
2. Click **Start**.
3. Navigate to **Programs > Oracle > Argus Insight**, and then select **Schema Creation Tool**.
4. Click **Initial ETL**.

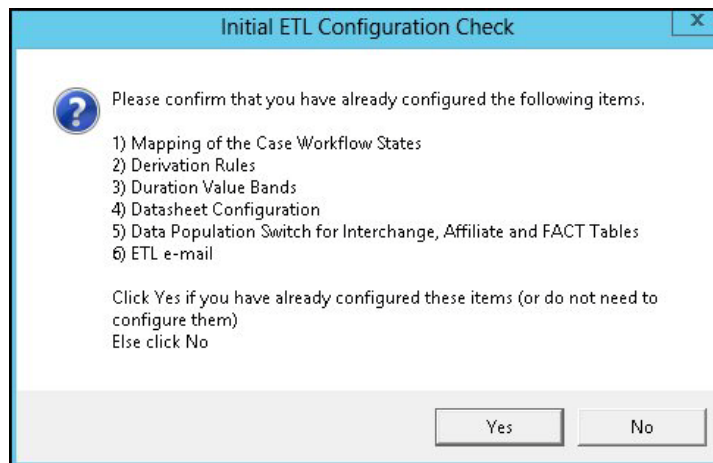
The Oracle Database Connect dialog box appears.

5. To connect to the Oracle Database:
 - a. In the **Password** field, enter the password for the APR_MART user.
 - b. In the **Database** field, enter the name of your Argus Insight database.
 - c. Click **OK**.

The Initial ETL Status dialog box opens.

6. Click **Start ETL**.

The initial process of extracting, transforming, and loading data begins. A message confirming that you have completed the required configuration steps appears.



7. Click **Yes** if these items have already been configured.

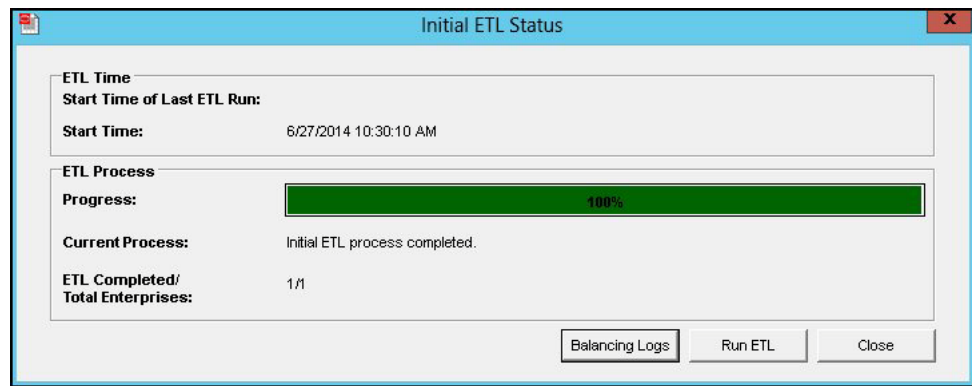
The Initial ETL Status dialog box appears stating the ETL start time, the progress bar, and the current process in execution.

While the ETL is in progress, you can:

- To close the dialog box, and exit from the Schema Creation Tool, click **Close**.
Closing the dialog box does not affect the execution of the ETL process.
- To halt the ETL process, click **Stop ETL**.

For more information about this option, see [Section 5.2.3, "Stopping the Execution of ETL."](#)

A status message appears when the initial ETL process is completed.



5.2.1 Generating the Balance Logs

When the system successfully completes the Initial ETL process, you should generate and check the logs.

To generate the balance logs:

1. Wait until the dialog box that reports the initial ETL completed successfully appears.
2. Click **Balancing Logs**.

A dialog box appears to confirm that you want to generate balancing logs for the completed Initial ETL appears.

3. Click **OK**.

The command prompt screen appears.

```
SQL*Plus: Release Production on Fri Jun 7 13:21:39
Copyright (c) Oracle. All rights reserved.

#####
##                                     ##
##               Argus Insight          ##
##               Generate balancing logs ##
##      Copyright Oracle Corporation. All Rights Reserved. ##
##                                     ##
#####
Enter Password for user APR_MART : _
```

4. Enter the password for the APR_MART user, and press **Enter**.

This following command prompt screen appears:

```
#####
##                                     ##
##               Argus Insight          ##
##               Generate balancing logs ##
##      Copyright Oracle Corporation. All Rights Reserved. ##
##                                     ##
#####
Enter Password for user APR_MART : 
-- Connecting to APR_MART
-----
Connected.
#####
## If user failed to connect to database then stop here and restart the tool ##
## To stop processing close current window.                                ##
##                                     ##
#####
Press Enter if the Script successfully connected as APR_MART@PRMART
```

5. Verify that the script is successfully connected as <APR_MART User Name>@<Argus Insight Database Name>, and press **Enter**.

The command prompt screen appears and the balancing logs are generated.

When the logs are generated, a dialog box with the location and name of the log files appears.

6. Click **OK** to close the dialog box.
7. Open and verify the contents of each Balancing Report.

The Balancing Reports are located at:

drive:\VSS SOURCE\Argus Insight\Main Source\Database Source\DBInstaller

The log files are named as:

- etl_ini_atos_bal_lm_cfg_rep.log
- etl_ini_atos_bal_rep.log
- etl_ini_stom_bal_lm_cfg_rep.log
- etl_ini_stom_bal_rep.log

5.2.2 Closing the Initial ETL Status Dialog Box

To close the Initial ETL Status dialog box and exit from the Schema Creation Tool:

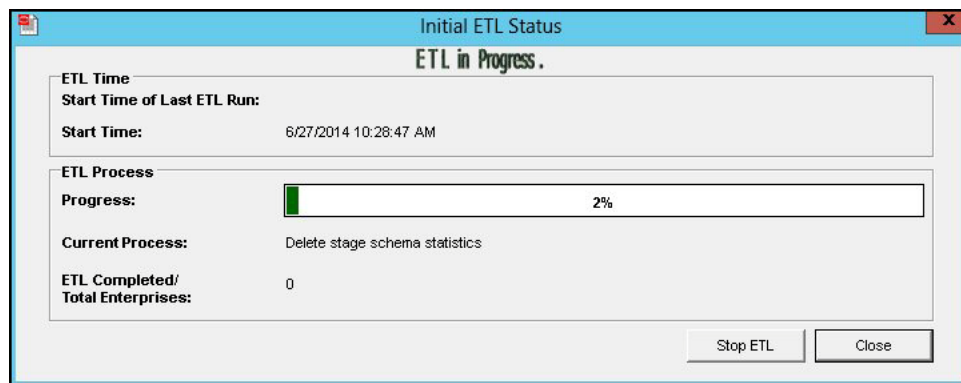
1. Click **Close**.

A message to confirm that you want to close the Schema Creation Tool application appears.

2. Click **OK**.

5.2.3 Stopping the Execution of ETL

You can choose to stop an ETL in progress.



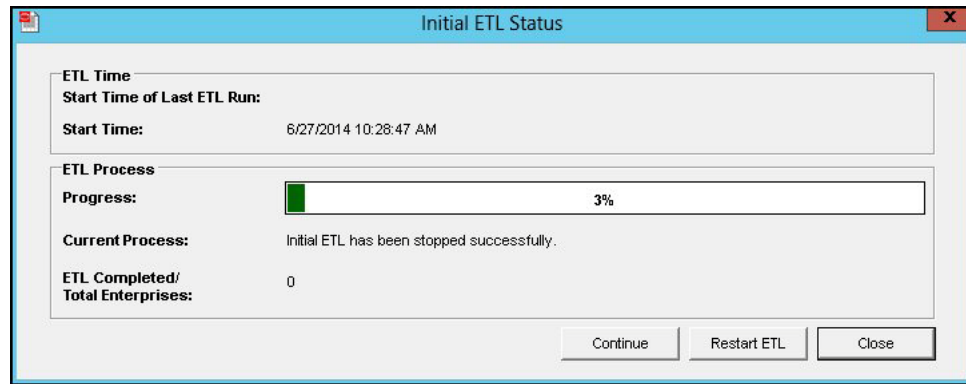
To halt the execution of the initial ETL process:

1. Click **Stop ETL**.

A message to confirm that you want to stop the ETL currently in progress appears.

2. Click **OK**.

The ETL process is stopped and returns to the Initial ETL Status dialog box.



At this point, you can select one of the following options:

- To continue extracting, transforming, and loading the data that was in progress, click **Continue**.
- To start the initial ETL from the beginning, click **Restart ETL**.
- To exit from the Schema Creation Tool application, click **Close**.

5.3 Running the Initial ETL Again

To start the ETL process from the beginning:

1. Click **Run ETL**.

A message to confirm whether you want to start the initial ETL from the beginning appears.

2. Click **OK**.

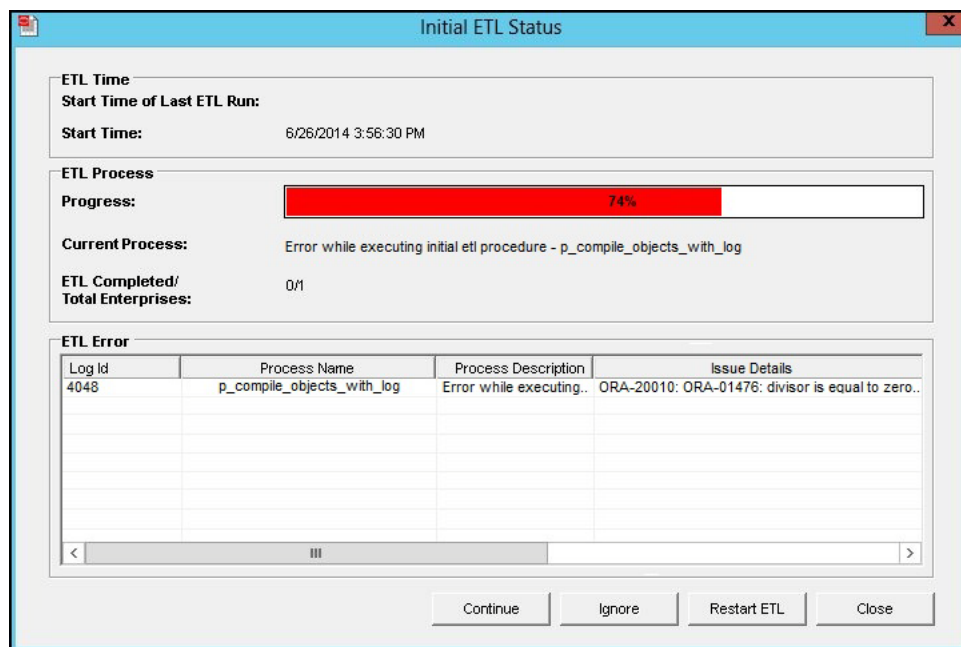
The Oracle Database Connect dialog box appears.

3. Enter the password for the APR_MART user, and then click **OK**.

The initial ETL process starts from the beginning.

5.4 Processing a Failed ETL

The initial ETL may fail due to an error. If an error occurs, the system stops processing the ETL and displays the following screen:



You may choose any of the following options for the failed Initial ETL process:

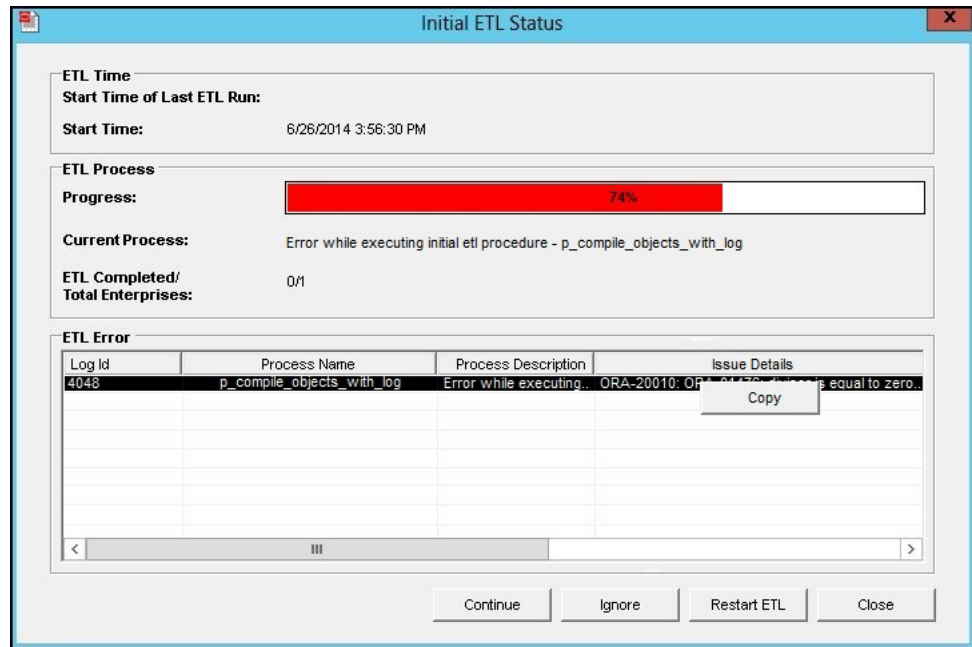
- To continue the failed Initial ETL process, click **Continue**.
- To ignore the failed Initial ETL process, click **Ignore**.
- For ETL Data Exclusion, click **Modify Attributes**, if PRE_REQ_CHECK_FLAG switch is set to ABORT.

Note: These modifications must be done before running the Initial ETL process.

5.4.1 Continuing the Failed Initial ETL Process

To continue the Initial ETL process from the failed ETL procedure:

1. Double-click on the ETL error.
The Error Data dialog box appears with details of the error.
2. Review the error information, and then click **OK**.
3. Right-click on the ETL Error, and click **Copy** to copy the error data.



4. Click **Continue** to continue the failed ETL process.

A message to confirm that you want to start the initial ETL from the stopped process appears.

5. Click **OK**.

The ETL process continues (if no errors are found).

5.4.2 Ignoring the Failed Initial ETL Process

To ignore a failed ETL process and continue with the next process in the ETL:

1. Click **Ignore**.

A message to confirm that you want to skip the failed process and continue executing the Initial ETL with the next process appears.

2. Click **OK**.

The Initial ETL begins from the next process and continues with the ETL process (if no errors are found).

5.4.3 Modifying the Attributes of ETL Data Exclusion

You must modify these attributes before ETL execution.

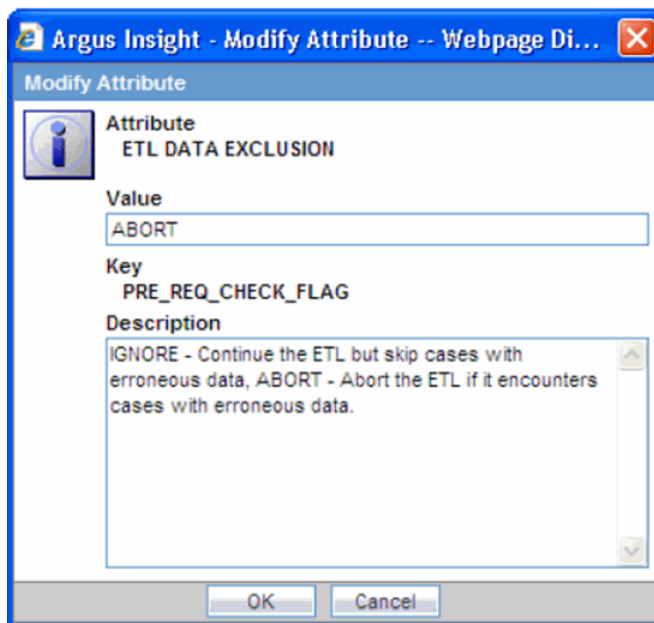
To modify ETL Data Exclusion attributes:

1. Log in to the Argus Insight application as a user with administrator privileges.
2. On Argus Insight home page, from the upper-right corner, click the **Tools** tab.
The Administration Tools screen appears.
3. Click the **List Maintenance** tab.
4. Select **Profile Switches** from the List Maintenance Items group.

The Attributes group is updated with the profile switches that you can modify.

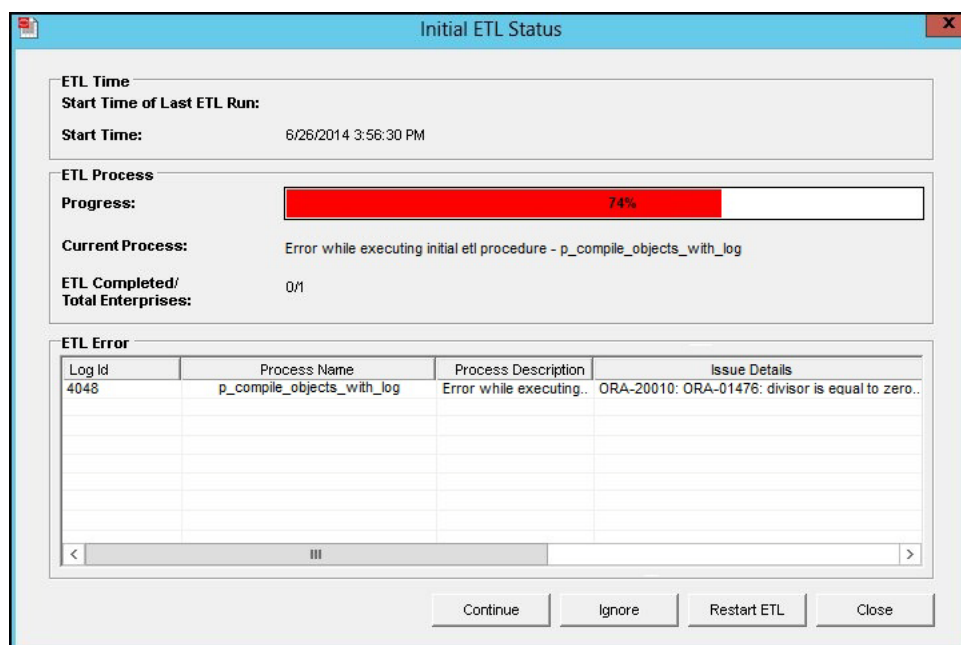
5. Select **ETL Data Exclusion**, and click **Modify**.

The Modify Attribute dialog box appears.



6. Click the **Value** field, and enter one of the following values:
 - If you want the ETL process to skip cases with erroneous data and continue processing all other cases, enter **IGNORE**.
 - If you want the ETL process to abort when it encounters cases with erroneous data, enter **ABORT**.
7. Click **OK** to save the changes and return to the List Maintenance tab.

5.5 Restarting the Initial ETL Process



To restart the Initial ETL process starting from after the confirmation message and APR_MART password input:

1. Click Restart ETL.

A message to confirm that you want to start the initial ETL from the beginning appears.

2. Click OK.

The Oracle Database Connect dialog box appears.

3. Connect to the Oracle Database:

- a.** In the **Password** field, enter the password for the APR_MART user.
- b.** In the **Database** field, enter the name of your Argus Insight database.
- c.** Click **OK**.

4. Click Start ETL to start the initial process of extracting, transforming, and loading data.

A message to confirm that you have completed the required configuration steps appears. See Section 5.2 > Step 6.

5. Click Yes if these items have already been configured.

The Initial ETL Status dialog appears with the ETL start time, the progress bar, and the current process in execution.

When the system finishes the ETL process, click **Close**.

Configuring the BIP Environment

Once you have installed the BI Publisher (BIP), you need to configure certain settings to be able to view the available reports in BIP. This chapter introduces you with the steps to make those configuration changes using BIP.

This chapter includes the following topics:

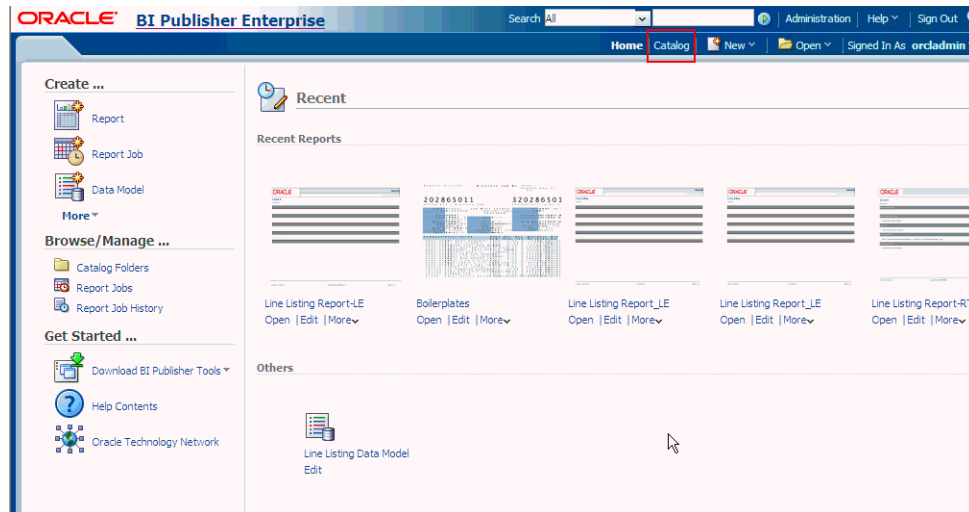
- [Uploading the Argus Insight.xdrz file to BIP](#)
- [Creating PRMART JDBC Connection](#)
- [Managing Users and Roles: BI Publisher Security Model](#)
- [Managing Users and Roles: Oracle Fusion Middleware Security Model](#)
- [Configuring BIP Users and Roles: Oracle Fusion Middleware Security Model](#)
- [Configuring BIP Roles and Permissions: BI Publisher Security Model](#)

6.1 Uploading the Argus Insight.xdrz file to BIP

Note: You must be logged in to BIP with the BI Admin User credentials to be able to upload the **Argus Insight.xdrz** file. You can refer to [Table 6-4](#) for more information on the BI Admin User.

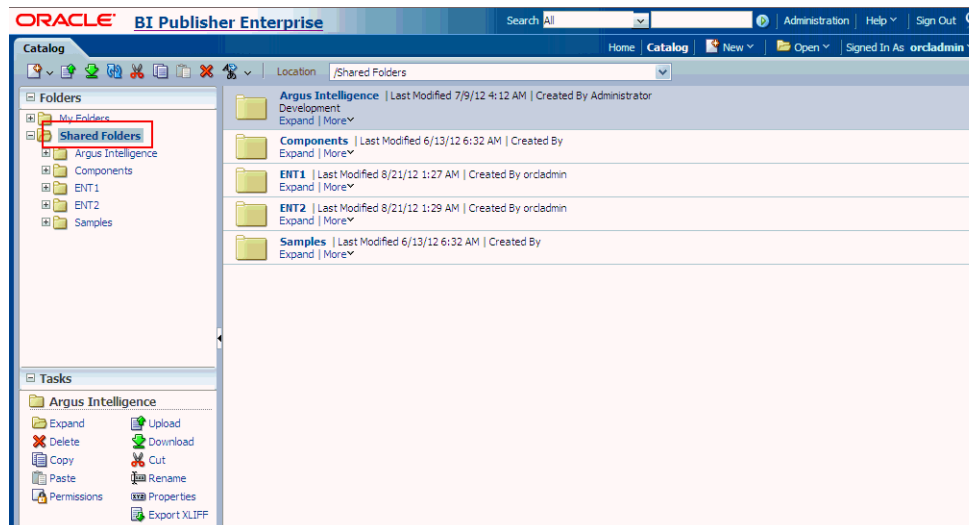
To upload the **Argus Insight.xdrz** file to BIP, execute the following steps:

1. Copy the **Argus Insight.xdrz** file from the following location on the Argus Insight Web Server to the local file system:
Drive:\<Argus Insight Installation Folder>\ArgusInsight\BIP\Repository
2. Log on to BIP using the BI Admin User credentials.
The BIP home page appears.
3. From the menu bar, click **Catalog**.

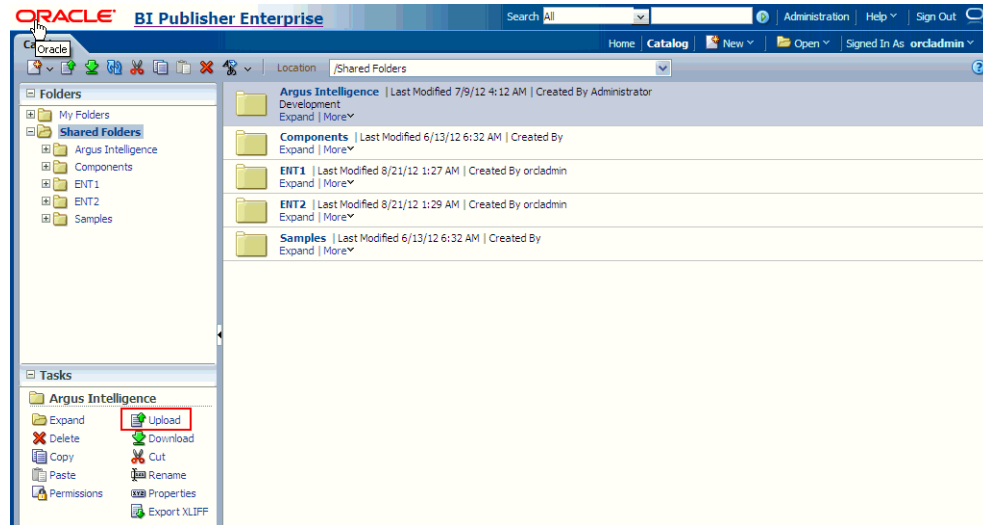


The Catalog screen with the **Folders** and **Tasks** sections appears.

4. From Folders section in the left pane, click **Shared Folders**.



5. From Tasks section in the left pane, click **Upload**.

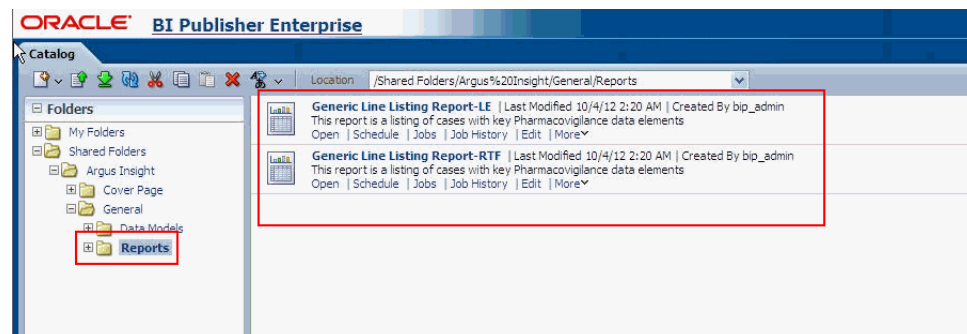


The Upload dialog box appears.

6. Click **Browse** and navigate to the location where you have saved the **Argus Insight.xdrz** file on the local file system.
7. Click **Upload**.

After successful upload, an **Argus Insight** folder is created in **Shared Folders**.

8. Expand the **Argus Insight** folder to verify that the **Generic Line Listing Data Model** exists in the **Data Models** sub-folder and the **Generic Line Listing Report** in **LE** and **RTF** formats exists in the **Reports** sub-folder.



6.2 Creating PRMART JDBC Connection

If you are installing BIP on a Windows machine, the TNS entry of Argus Insight must be added in **TNSNAMES.ora** file of the BIP Web Server.

If BIP is installed on a Linux machine, no modifications to the **TNSNAMES.ora** file are required.

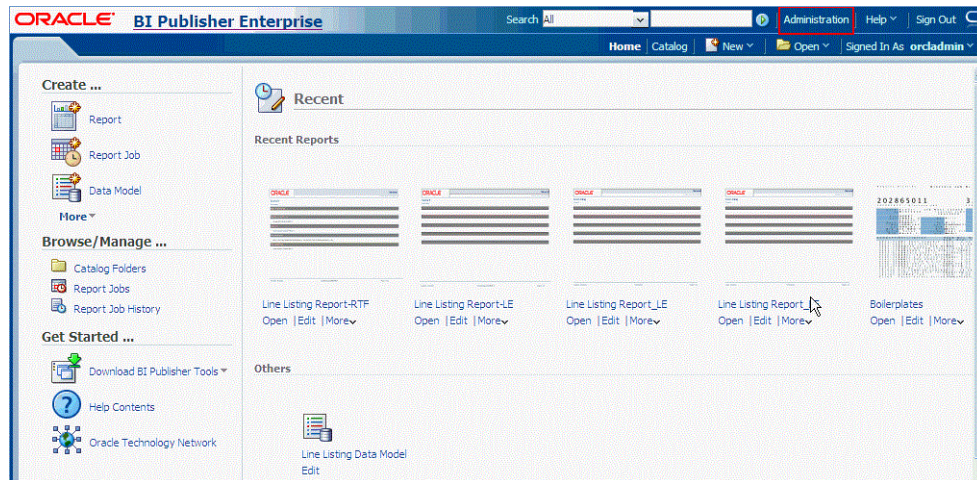
When you have uploaded the **Argus Insight.xdrz** file to BIP, you also need to create a connection between the BIP and the database.

To connect the BIP and the database, execute the following steps:

1. Log on to BIP using the administrator credentials.

The BIP home page appears.

2. From top-menu, click **Administration**.

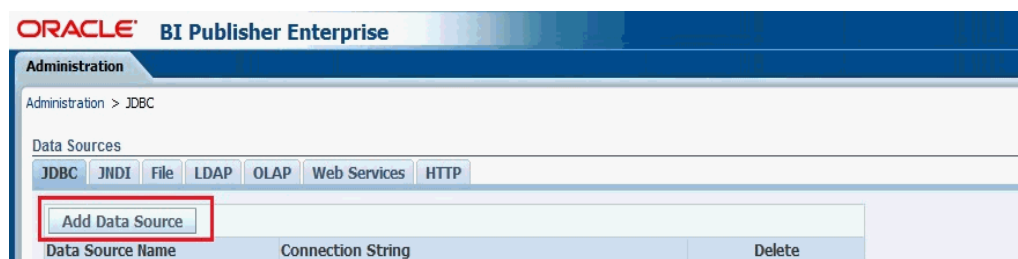


3. In the Data Sources section, click **JDBC Connection**.



The Data Sources screen appears.

4. Click **Add Data Source**.



5. In the **Add Data Source** section:
 - a. In the **Data Source Name** field, enter **PRMART**.
 - b. From the **Driver Type** drop-down list, select the database.
The **Database Driver Class** field is auto-populated based on the selected Driver Type.
 - c. In the **Connection String** field, enter the connection string.
You must enter all the details in lower case in this field.

- d. In the **Username** field, enter the username (Argus Insight application DB user, for example, `apr_app`) to connect to the database.
- e. In the **Password** field, enter the password for the user.
- f. Click **Test Connection**.

Administration > JDBC > Update Data Source: PRMART

Update Data Source: PRMART

General

✓TIP Please make sure to install the required JDBC driver classes.
 ✓TIP With Oracle Fusion Middleware Security Model, select the Use System User checkbox to use the BI System User for your BI Server Database Connection.

Data Source Name: PRMART
 * Driver Type: Oracle 11g
 * Database Driver Class: oracle.jdbc.OracleDriver
 * Connection String: jdbc:oracle:thin:@x.x.x.x:PORT:SID

Use System User: ☐
 * Username: apr_app
 Password: *****

Pre Process Function:
 Post Process Function:

☐ Use Proxy Authentication
Test Connection

If successful, a confirmation message appears.

6. Click **Apply**.

The **PRMART** Data Source in the list of already existing data source names appears.

Administration > JDBC

Data Sources

JDBC JNDI File LDAP OLAP Web Services HTTP

Add Data Source

| Data Source Name | Connection String | Delete |
|------------------|------------------------------------|--------|
| PRMART | jdbc:oracle:thin:@x.x.x.x:PORT:SID | |

A connection between BIP and the database is successfully created.

6.3 Managing Users and Roles: BI Publisher Security Model

When you have uploaded the **Argus Insight.xdrz** file to BIP and created the JDBC connection, you can start creating the users for the BI Publisher Security Model.

This section introduces you to the steps that you need to execute to create users, assign the roles and permissions to those users, and configure server settings for the BI Publisher Security Model.

This section comprises the following sub-sections:

- [Configuring Server Settings](#)
- [Creating Users and Assigning Roles to Users](#)
- [Creating Roles, Adding Data Sources, and Assigning Roles](#)

6.3.1 Configuring Server Settings

Note: When using file systems such as NFS, Windows, or NAS for the repository, ensure that the file system is secured.

To configure the server settings for the BI Publisher Security Model, execute the following steps:

1. Log on to BIP using the administrator credentials.
The BIP home page appears.
2. From top-menu, click **Administration**.
Refer to Section 6.2 > Step 2.
3. In the System Maintenance section, click **Server Configuration**.



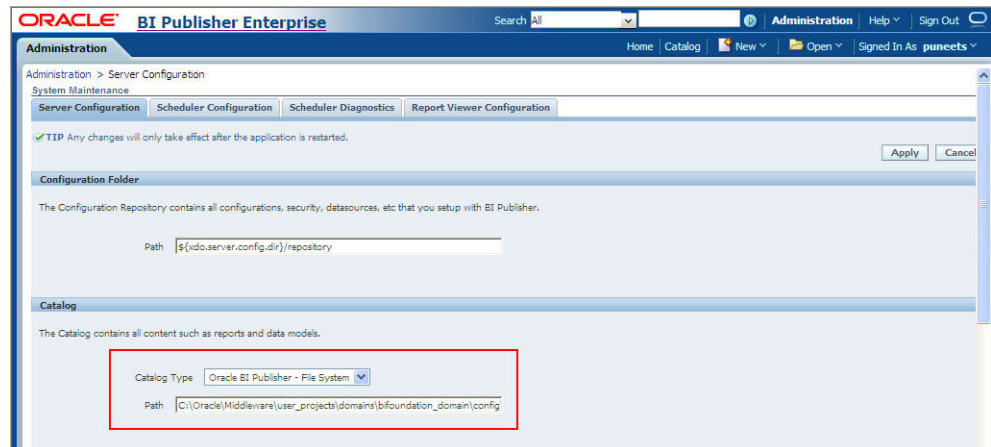
The Server Configuration screen appears.

4. In the Catalog section, from the **Catalog Type** drop-down list, select **Oracle BI Publisher - File System**.

If the Catalog Type is not Oracle BI Publisher - File System, the folder level permission settings cannot be done in BIP. Refer to the BIP Technical Reference document for more information.

Note: Only **Oracle BI Publisher - File System** is supported in this release.

5. Enter the path where all BIP folders, data models, and BIP reports will be stored in the BIP server.



6. Click **Apply** to save the changes.
7. Restart the BI server.

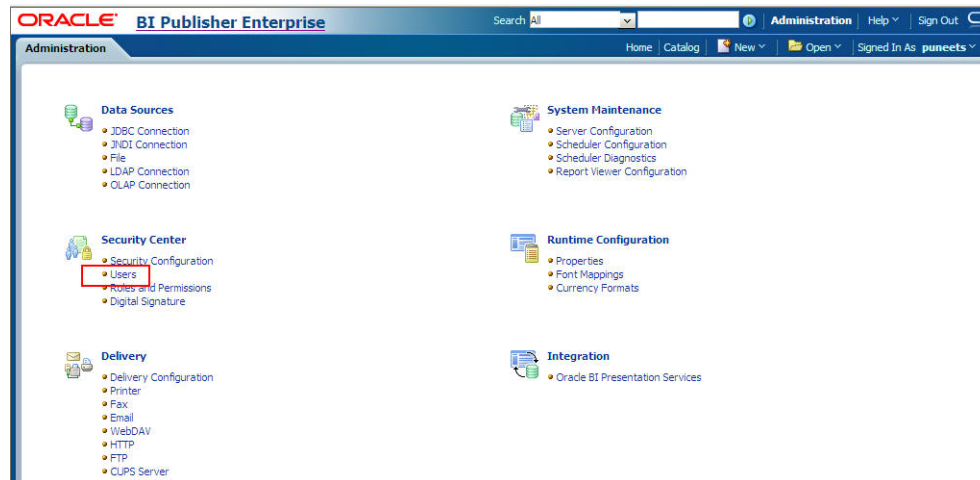
Note: Because the repository is in the file system, the case sensitivity of folder and Report Names is determined by the platform on which you run BIP. For Windows-based environments, the repository object names are not case-sensitive. For UNIX-based environments, the Repository Object Names are case-sensitive.

For more information, refer to the Oracle BIP Administrator's Guide > Configuring Server Properties section.

6.3.2 Creating Users and Assigning Roles to Users

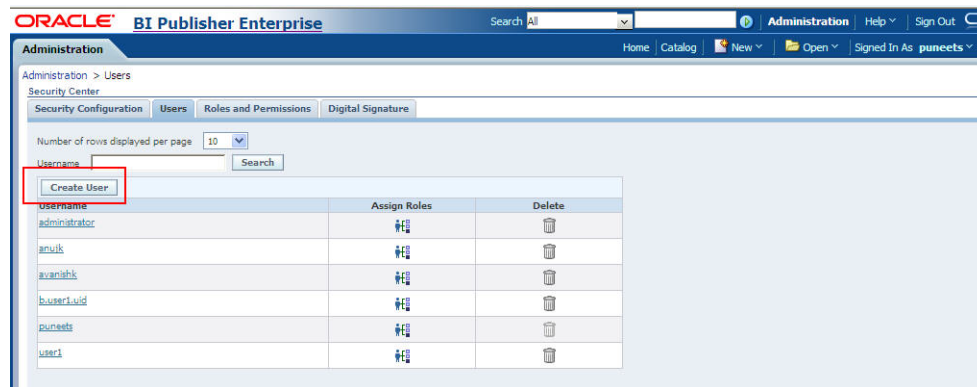
To create users and assign the required roles to the users in the BIP Security Model, execute the following steps:

1. Log on to BIP using the administrator credentials.
The BIP home page appears.
2. From top-menu, click **Administration**.
Refer to Section 6.2 > Step 2.
3. In the Security Center section, click **Users**.



The Users screen appears.

4. Click **Create User**.



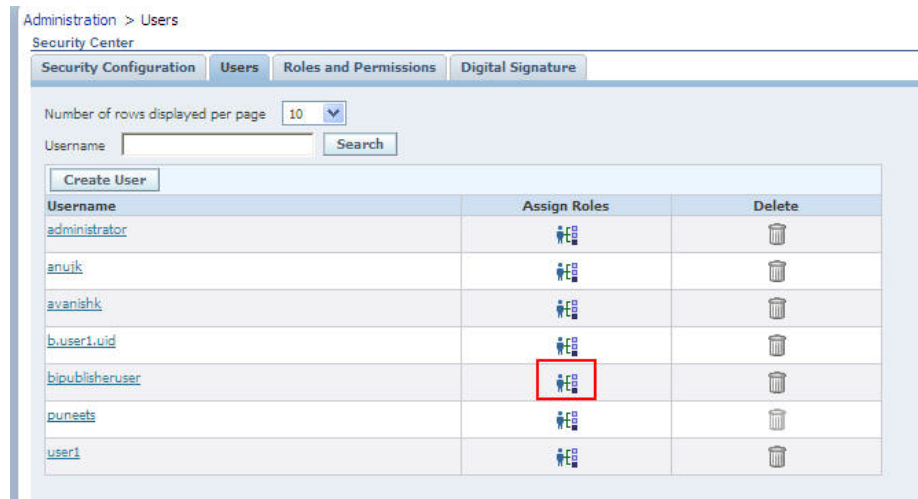
The Create User screen appears.

5. In the **Username** field, enter the name of the user.
6. In the **Password** field, enter the password.
7. Click **Apply**.

The name of the user appears in the list of existing users.

When you have created the user, you need to assign the required roles to the user.

8. Click the Assign Roles icon corresponding to the user that you have created.



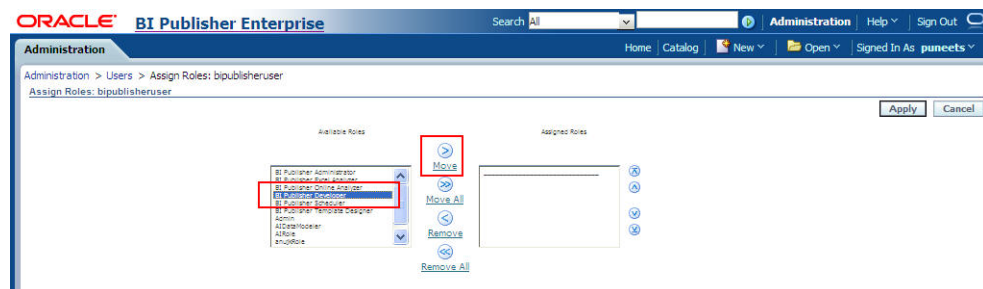
The Assign Roles screen appears.

The BIP system roles such as BI Publisher Administrator, BI Publisher Excel Analyzer, BI Publisher Online Analyzer, BI Publisher Developer, BI Publisher Scheduler, and BI Publisher Template Designer are available by default along with the custom roles (if any) that have been created by you.

See [Section 6.3.3, "Creating Roles, Adding Data Sources, and Assigning Roles"](#) for the steps to create custom roles.

For more information on system roles, refer to Understanding BI Publisher's Users, Roles, and Permissions in Administrator's Guide for Oracle Business Intelligence Publisher.

- From the Available Roles section, select the role that you want to assign to the user, and click **Move(>)** to move the selected role to the Assigned Roles section.



- Click **Apply**.

The selected roles are assigned to the user.

For the list of users that you need to configure using BIP, refer to [Section 6.5, "Configuring BIP Users and Roles: Oracle Fusion Middleware Security Model"](#).

6.3.3 Creating Roles, Adding Data Sources, and Assigning Roles

In addition to creating users and assigning them the required roles, you also need to create certain roles, add data sources, and assign them the required roles.

To create roles, add data sources, and assign them the required roles, execute the following steps:

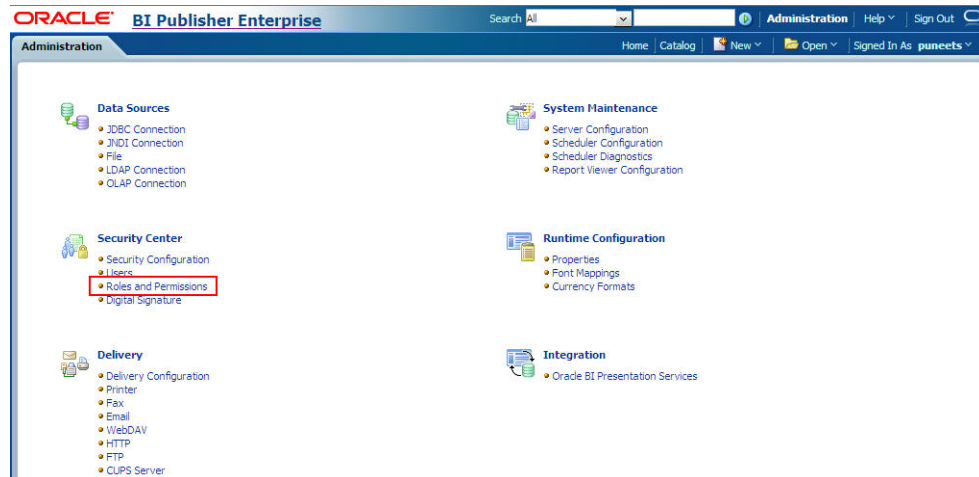
- Log on to BIP using the administrator credentials.

The BIP home page appears.

2. From the top-menu, click **Administration**.

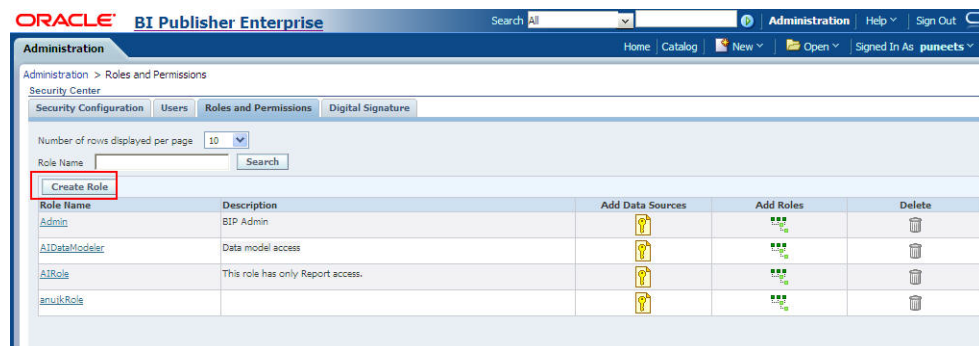
Refer to Section 6.2 > Step 2.

3. In the Security Center section, click **Roles and Permissions**.



The Roles and Permissions screen appears.

4. Click **Create Role**.

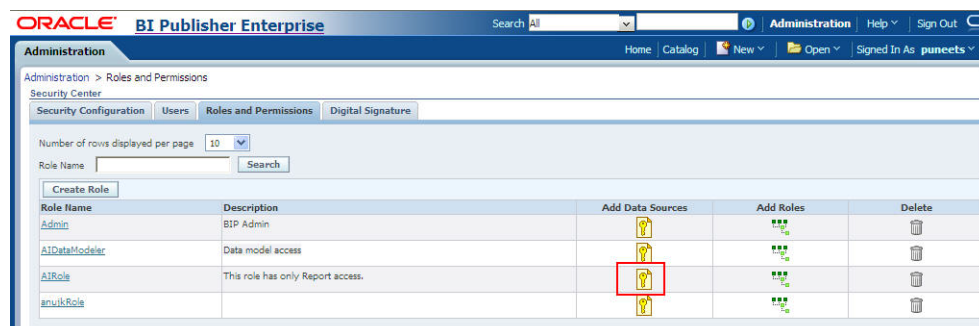


The Create Role screen appears.

5. Enter the **Name** and **Description** of the role, and click **Apply**.

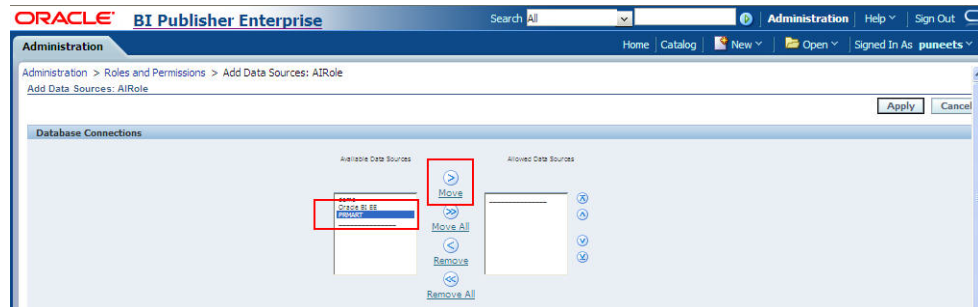
The new role is created and appears in the list of existing roles in the Roles and Permissions screen.

6. Click **Add Data Sources** icon, corresponding to the role which you have just created.



The Add Data Sources screen appears.

7. Form Available Data Sources section, select **PRMART**, and click **Move(>)** to move it to the Allowed Data Sources section.



8. Click **Apply** to save the changes.

The Roles and Permissions screen appears.

See [Section 6.2, "Creating PRMART JDBC Connection"](#) for the steps to create the JDBC connection.

9. Click the **Add Roles** icon, corresponding to the role which you have just created to add the required roles.

The Add Roles screen appears.

10. From the Available Roles section, select the roles that you want to include, and click **Move(>)** to move the selected roles to the Included Roles section.

11. Click **Apply** to save the changes.

For more information, refer to the Configuring Users, Roles, and Data Access section in the Oracle BIP Administrator's Guide.

For the list of roles that you need to configure using BIP, refer to [Section 6.5, "Configuring BIP Users and Roles: Oracle Fusion Middleware Security Model"](#).

6.4 Managing Users and Roles: Oracle Fusion Middleware Security Model

This section introduces you with the steps that you need to execute to create users, assign the roles and permissions to those users, and configure server settings for the Oracle Fusion Middleware Security Model.

This section comprises the following sub-sections:

- [Configuring Server Settings](#)
- [Creating Users and Assigning Roles to Users](#)
- [Creating Roles, Adding Data Sources, and Assigning Roles in WebLogic Enterprise Manager](#)
- [Creating Application Policy](#)

6.4.1 Configuring Server Settings

The steps to configure the server settings in the Oracle Fusion Middleware Security Model are exactly the same as that of the BI Publisher Security Model.

Refer to [Section 6.3.1, "Configuring Server Settings"](#) for the steps to configure the server settings.

6.4.2 Creating Users and Assigning Roles to Users

Creating users for LDAP or SSO users is done using the LDAP servers which is beyond the scope of this manual.

For the list of users that need to be configured, refer to the [Section 6.5, "Configuring BIP Users and Roles: Oracle Fusion Middleware Security Model"](#).

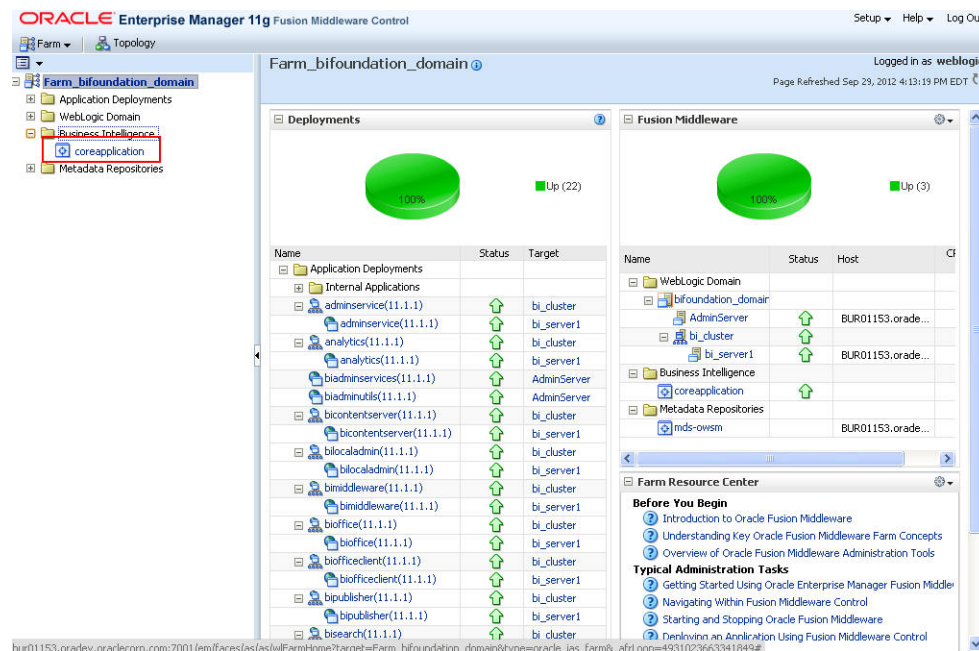
6.4.3 Creating Roles, Adding Data Sources, and Assigning Roles in WebLogic Enterprise Manager

To create roles, add data sources, and assign roles in WebLogic Enterprise Manager, execute the following procedure:

1. Log on to the Enterprise Manager.

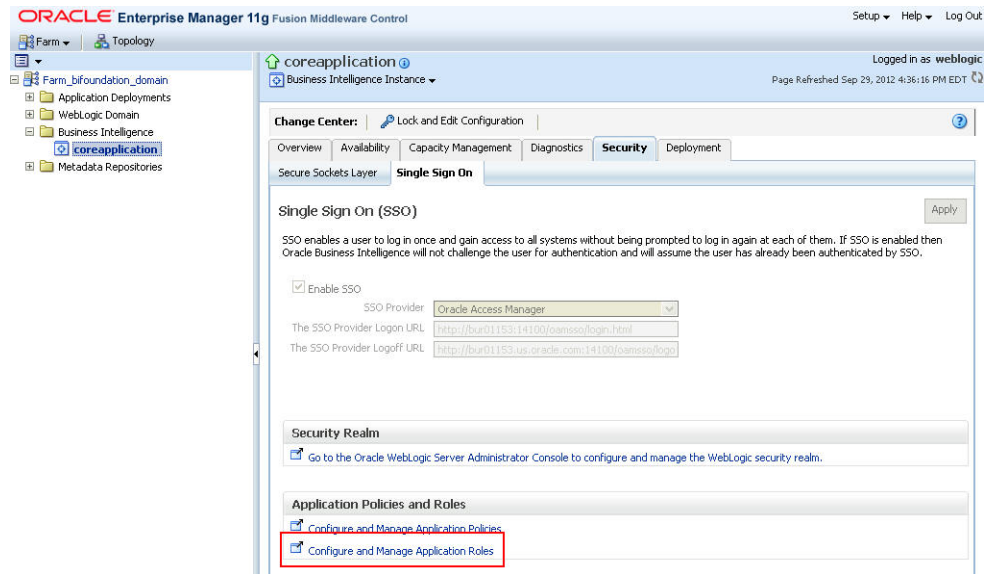
The Enterprise Manager home page appears with a list of folders in the left pane.

2. In the left pane, expand the **Business Intelligence** folder, and click **coreapplication**.



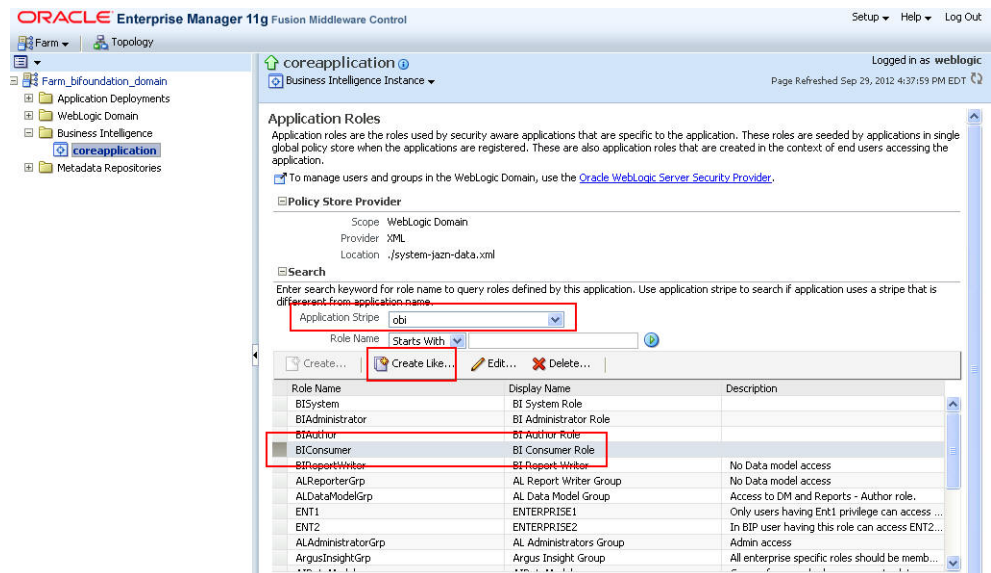
The Coreapplication screen appears in the right pane.

3. In the Application Policies and Roles section, click **Configure and Manage Application Roles**.



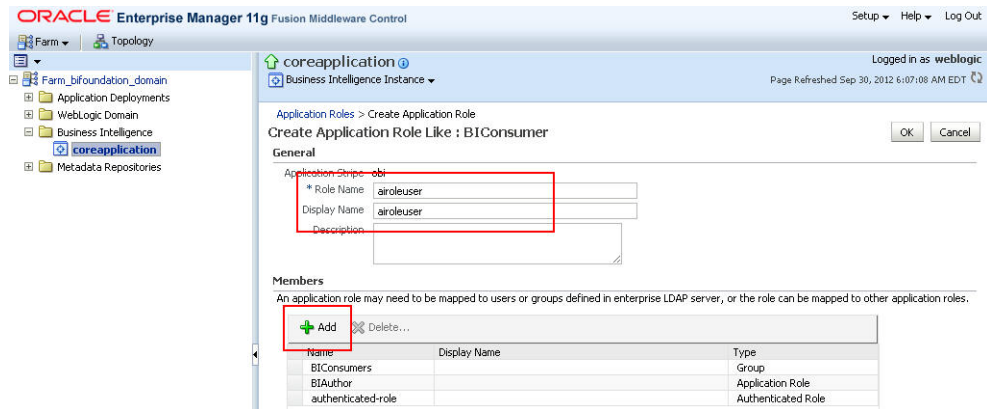
The Application Roles screen appears.

4. From the **Application Stripe** drop-down list, select the required application stripe.
5. Select any existing role (for example, BIConsumer), and click **Create Like**.



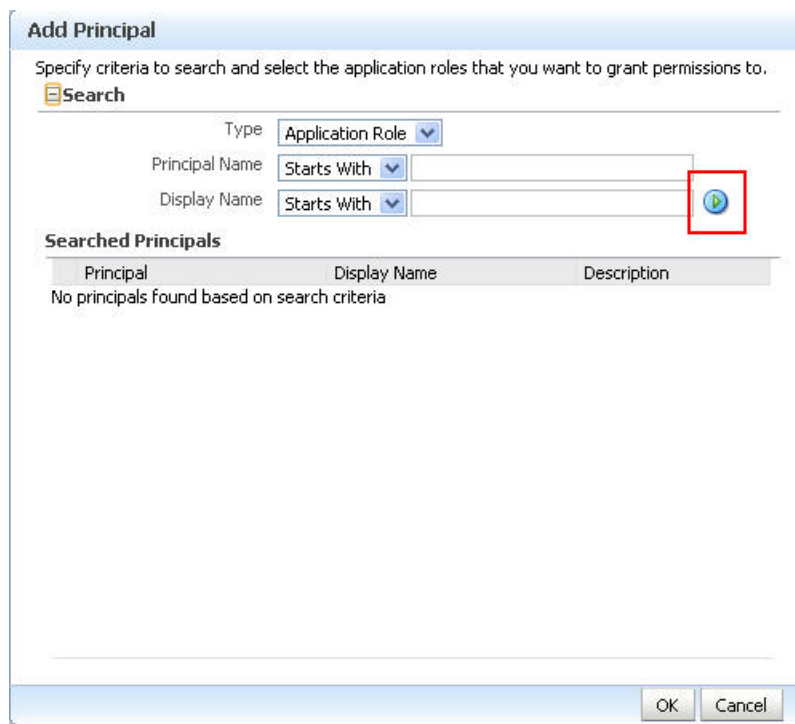
The Create Application Role screen appears.

6. In **Role Name** field, enter the name of the role.
7. Optionally, enter the **Display Name** and **Description** for the role.
8. To add any existing application role/group/user to the new role, click **Add**.



The Add Principal screen appears.

9. To display the list of all the roles, groups, and users that are created in LDAP server, click the > icon next to the **Display Name** field.



10. Select the name of the role, group, or user that you want to add to the new role, and click **OK**.

For example, for the **BIRewriter** role, **BICConsumer** and **authenticated-role** are mandatory members. Besides that, the **AIRole** must also be a part of the **BIRewriter** Role. These roles are displayed in the Members section of the Create Application screen.

General

Application Stripe: obi

Role Name: BIReportWriter

Display Name: BI Report Writer Role

Description: Only Reports access.

Members

An application role may need to be mapped to users or groups defined in enterprise LDAP server, or the role can be mapped to other application roles.

+ Add - Delete...

| Name | Display Name | Type |
|--------------------|--------------|--------------------|
| authenticated-role | | Authenticated Role |
| BIConsumer | | Application Role |
| AIRole | | Application Role |

Note: The **BIReportWriter** role must be added to the **BIReportWriter** application policy. Refer to [Section 6.4.4, "Creating Application Policy"](#) for the steps to create the application policy for the **BIReportWriter** role.

11. Repeat steps 8 to 10 to add more roles, users, and groups to the new role.
12. On Create Application Role screen, click **OK** to save the changes.
When you have created the role and added the required list of users, roles, and groups to the new role, you must add the **PRMART** data source to the new role.
13. Log on to BIP using the administrator credentials.
The BIP home page appears.
14. From top-menu, click **Administration**.
Refer to Section 6.2 > Step 2.
15. In Security Center section, click **Roles and Permissions**.
The Roles and Permission screen appears.
You can view the name of the new role which you have just created in the list of role names.
16. Click the **Add Data Sources** icon corresponding to the name of the new role.
The Add Data Sources screen appears.
17. From the Available Data Sources section, select **PRMART**, and click the **Move (>)** icon to move the PRMART data source to the Allowed Data Sources section.
18. Click **Apply** to save the changes.
For more information, refer to the Oracle BIP Administrator's Guide > Creating Application Roles Using Fusion Middleware Control section.
For the list of roles that need to be configured, refer to the [Section 6.5, "Configuring BIP Users and Roles: Oracle Fusion Middleware Security Model"](#).

6.4.4 Creating Application Policy

Once you have created the new role and assigned the required roles, users, and data sources to the role, you also need to create the application policy for the new role.

Before creating a BI Publisher policy, you must have created an empty role in the Enterprise Manager.

Note: The steps mentioned in this section are valid for creating **BIReportWriter** application policy.

To create the application policy for the new role, execute the following steps:

1. Log on to the Enterprise Manager.
The Enterprise Manager home page appears with a list of folders in the left pane.
2. In the left pane, expand the **Business Intelligence** folder, and click **coreapplication**.
The Coreapplication screen appears in the right pane.
3. In the Application Policies and Roles section, click **Configure and Manage Application Policies**.
The Application Policies screen appears.
4. From the **Application Stripe** drop-down list, select **obi**.
5. Select the **BIAuthor** policy, and click **Create Like**.
The Create Application Grant Like screen appears with the **Grantee** and **Permissions** sections.
6. In the Grantee section, click **Add**.
This displays the **Add Principal** Screen.
7. To retrieve the list of all the available application roles, click the > icon next to the **Principal Name** field.
8. From the Searched Principals section, select the name of the role (for example, **BIReportWriter**), and click **OK**.
The Create Application Grant Like screen appears.
9. From the list of Permission Classes, select the **developDataModel** resource name, and click **Delete**.
10. Click **OK** to apply the changes.

6.5 Configuring BIP Users and Roles: Oracle Fusion Middleware Security Model

This section lists the names of the <Admin Users> and roles that you need to configure using the steps given in [Section 6.3, "Managing Users and Roles: BI Publisher Security Model"](#) and [Section 6.4, "Managing Users and Roles: Oracle Fusion Middleware Security Model"](#).

Table 6–1 Configuring BIP Users: Oracle Fusion Middleware Security Model

| User | Description |
|---------------|--|
| BI Admin User | An Admin user refers to the user who has BI Publisher administrative rights. This user should belong to the BIAdministration functional role. |

Table 6–1 (Cont.) Configuring BIP Users: Oracle Fusion Middleware Security Model

| User | Description |
|--------------------|---|
| Data Modeler Users | <p>An Argus Insight Data Model user refers to the user who should have access to both Data Models and Reports in the Argus Insight folder. This user should belong to AIDataModeler custom role.</p> <p>There are Enterprise specific Modeler users, who have access to Data Models and Reports in Enterprise specific folders and Argus Insight folder. These users should have Enterprise specific Modeler roles assigned to them. This user should belong to Enterprise specific Modeler roles.</p> |
| Users | <p>An Argus Insight Role (AIRole) user refers to the user who should have access to Reports only, and should have Read-only access to the Data Model which is required to create the reports. This user should belong to AIRole.</p> <p>There can be users who have access to reports of specific Enterprises. These users can Read/Write reports in Enterprise specific Report folder and Argus Insight Report folder. However, these users have Read-only access to the Data Models in the Enterprise specific Data Model and Argus Insight Data Model folder. This user should belong to Enterprise specific Report roles.</p> |
| Global Admin Users | <p>An AI Admin Role user should have full access to the Argus Insight folder (Read/Write/Delete).</p> <p>An Enterprise specific Admin user should have full access to the Enterprise specific folders (Read/Write/Delete) and Argus Insight folder (Read/Write/Delete).</p> |

6.5.1 Configuring BIP Roles

The following table illustrates the roles that you need to configure using BIP:

Table 6–2 Configuring BIP Roles

| Role | Users/Roles to be added |
|------------------------------------|--|
| BIAdministration (Functional Role) | Super user who has full access to any folder and BIP Administration access |
| AIRole | All Argus Insight role users, AIDataModelerRole , and All Enterprise Report Roles (for specific enterprises) |
| AIDataModelerRole | All AI Data Modeler Users, All Enterprise Modeler Roles, and AIAdminRole |
| Enterprise Report Role | Users that belong to a specific Enterprise with Reports access and Enterprise Modeler Role |
| Enterprise Modeler Role | Users that belong to a particular Enterprise with both Data Models and Reports access |
| Enterprise Admin Role | Enterprise specific Admin users. These users should have full access to the Enterprise specific folders. |
| AIAdminRole | Any User with this role should have full access to the Argus Insight Folder. The Enterprise Admin Role should be added to this role. |
| BIAdministrator (Functional Role) | BI Admin User |
| BIAuthor (Functional Role) | AIDataModelerRole |

Table 6–2 (Cont.) Configuring BIP Roles

| Role | Users/Roles to be added |
|--|-------------------------|
| BIReportWriter (create this role using the steps given in section 8.4.3 and create an Application Policy for this role using the steps given in section 8.4.4) | AIRole |

6.5.2 Folder Level Permissions

This section explains the Folder Level permissions that you need to grant using BIP.

For more information, refer to the Oracle BIP Administrator's Guide > About Catalog Permissions section.

Table 6–3 Folder Level Permissions

| Folder | Roles to be added | Permissions |
|---|---|---|
| Argus Insight | AIAdminRole | Full access |
| Argus Insight > General > Data Model | AIDataModelerRole, AIRole | AIDataModelerRole - Full access AIRole - Read, Run, Schedule, and View report |
| Argus Insight > General > Reports | AIRole | Full access |
| Argus Insight > CoverPage | AIRole | Full access |
| Enterprise specific folders | Enterprise Specific Admin Role | Full access |
| Enterprise Specific Folder -- Data Model | Enterprise Modeler Role, Enterprise Report Role | Enterprise Modeler Role - Full access Enterprise Report Role -Read, Run, Schedule, and View report |
| Enterprise Specific Folder - Reports | Enterprise Report Role | Full access |

6.6 Configuring BIP Roles and Permissions: BI Publisher Security Model

This section explains the users, which you need to create, and the roles that you need to assign to those users using the BI Publisher.

This section comprises the following sub-sections:

- [Argus Insight Specific Users and Roles](#)
- [Enterprise Specific Users and Roles](#)

6.6.1 Argus Insight Specific Users and Roles

The Argus Insight folder comprises two sub-folders:

- Data Models
- Reports

There are three types of Argus Insight specific users and their corresponding roles. The following is the list of users that you need to create along with the name of the role for each user:

- **User Name:** AIAdminRole Users, **Role Name:** AIAdminRole
- **User Name:** AIDataModeler Users, **Role Name:** AIDataModelerRole
- **User Name:** AIRole Users, **Role Name:** AIRole

In addition to these users that you need to create, there is a default BI Admin User for the application. This user is a super user with a BIP administration access and has also got access to upload the Argus Insight repository.

The access to the Data Models and Reports folder depends on the type of the user and the role assigned to that user. In addition, the BI publisher also allows you to add roles (Nested Role) to a role (Super Role). In that case, the user with the Super Role privileges also has the privileges of the nested role.

For example, a user has been assigned an X role and you add Y role to the X role, that user also has the privileges of the Y role, even though Y role is not directly assigned to the user.

You may refer to [Section 6.3, "Managing Users and Roles: BI Publisher Security Model"](#) or [Section 6.4, "Managing Users and Roles: Oracle Fusion Middleware Security Model"](#), depending on the Security Model that you are using for the steps to create users, create roles, and assign roles to users and roles.

The following table lists the Argus Insight specific users that you need to create, the roles that you need to assign to the users, and the description about the privileges for each user and role:

Table 6–4 Argus Insight Specific Users and Roles

| Name of the User/Role | Users/Roles to be added | Description |
|-----------------------|--|---|
| BI Admin User | BI Administration (Functional Role) | The BI Admin User has access to upload the Argus Insight repository and works as a Super user who has BIP Administration access. |
| AIAdminRole | AIDataModelerRole | The user with this role has full access to the Argus Insight Folder. |
| AIAdminRole Users | AIAdminRole | This user has full access to the Argus Insight Folder. |
| AIDataModelerRole | BI Publisher Developer AIRole | The user with this role has access to the Argus Insight Data Models and Reports folders. |
| AIDataModeler Users | AIDataModelerRole | The user has access to Argus Insight Data Models and Reports folders. |
| AIRole | BITemplate Designer and BI Publisher Scheduler roles | The users belonging to this role have read-only access to the Argus Insight Data Models folder and full access of the Argus Insight Reports folder. |
| AIRole Users | AIRole | This user has read-only access to the Argus Insight Data Models folder and full access to the Argus Insight Reports folder. |

6.6.2 Enterprise Specific Users and Roles

In addition to the Argus Insight specific users and roles, you can also create Enterprise specific users and roles, and add extra privileges to those users and roles by adding Argus Insight specific roles to them.

Similar to the Argus Insight folder, each enterprise comprises the **Data Models** and **Reports** folder.

There are three types of Enterprise specific users and their corresponding roles. The following is the list of enterprise specific users that you need to create along with the name of the role for each user:

- **User Name:** Enterprise Specific Admin Users, **Role Name:** Enterprise Admin Role
- **User Name:** Enterprise Modeler Role Users, **Role Name:** Enterprise Modeler Role
- **User Name:** Enterprise Report Role Users, **Role Name:** Enterprise Report Role

Table 6–5 Enterprise Specific Users and Roles

| Name of the User/Role | Users/Roles to be added | Description |
|---------------------------------|---|--|
| Enterprise Admin Role | AIAdminRole (Created in 8.6.1 section) | The user belonging to this role has full access to the Enterprise specific folder. In addition, the user belonging to this role also has full access to the Argus Insight folder. |
| Enterprise Specific Admin Users | Enterprise Admin Role | This user has full access to the Enterprise specific Folder. In addition, this user has full access to the Argus Insight folder. |
| Enterprise Modeler Role | AIDataModelerRole (Created in 8.6.1 section) Enterprise Report Role | The user belonging to this role has access to: Argus Insight Data Models folder (Full access) Argus Insight Reports folder (Read, Run, Schedule, View report) Enterprise specific Data Models folder (Full access) Enterprise specific Reports folder (Read, Run, Schedule, View report) |
| Enterprise Modeler Role Users | Enterprise Modeler Role | This user has access to: Argus Insight Data Models folder (Full access) Argus Insight Reports folder (Read, Run, Schedule, View report) Enterprise specific Data Models folder (Full access) Enterprise specific Reports folder (Read, Run, Schedule, View report) |

Table 6–5 (Cont.) Enterprise Specific Users and Roles

| Name of the User/Role | Users/Roles to be added | Description |
|------------------------------|-----------------------------------|---|
| Enterprise Report Role | AIRole (Created in 8.6.1 section) | <p>The user belonging to this role has access to:</p> <p>Argus Insight Data Models folder (Read only)</p> <p>Argus Insight Reports folder (Full access)</p> <p>Enterprise specific Data Models folder (Read only)</p> <p>Enterprise specific Reports folder (Full access)</p> |
| Enterprise Report Role Users | Enterprise Report Role | <p>This user has access to:</p> <p>Argus Insight Data Models folder (Read only)</p> <p>Argus Insight Reports folder (Full access)</p> <p>Enterprise specific Data Models folder (Read only)</p> <p>Enterprise specific Reports folder (Full access)</p> |

For information on the Folder Level permissions that you need to grant using BIP, refer to [Section 6.5.2, "Folder Level Permissions"](#).

Configuring the BusinessObjects XI Environment

This chapter describes how to configure the BusinessObjects XI (BOXI) environment. You must configure the BusinessObjects XI environment in the order specified in this guide.

This chapter includes the following topics:

- [Checking Requirements](#)
- [Configuring the BusinessObjects Server](#)
- [Configuring the Argus Insight Web Server](#)

If you are using Cognos 10 instead of BusinessObjects XI, see [Chapter 8](#) for information about configuring the Cognos 10 environment for Argus Insight.

7.1 Checking Requirements

Before configuring the BusinessObjects environment, verify that you have installed all required hardware and software. For more information, see [Section 1.2, "Software and Hardware Requirements."](#)

In addition, if you are using the 64-bit version of Internet Information Services 7 (IIS 7), you must ensure that:

- ASP.NET is enabled.
- The IIS advanced setting **Enable 32-bit Applications** is set to **True**.
- The IIS advanced setting **.NET Application Pool** is set to **Classic** mode.

Note: Argus Insight 8.0 does not support multi-tenancy with its reporting framework for BusinessObjects. There are no restrictions in the multi-tenant Argus Insight database for the functioning of BusinessObjects. The users can enhance the Argus Insight Reporting framework or tweak BusinessObjects to support multi-tenancy in BO reports.

7.2 Configuring the BusinessObjects Server

If the BusinessObjects application uses a different server from the Argus Insight application, you must update the TNSNAMES.ora file as follows:

1. Copy the PRMART TNS entry from the Argus Insight Web Server.

2. Paste the entry into the TNSNAMES.ora file on the BusinessObjects Server.

Note: PRMART TNS entry must be mentioned in the TNSNAMES.ora file for both 32-bit and 64-bit Oracle Client.

If both applications use the same server and Oracle client, no modifications to the TNSNAMES.ora file are required.

7.3 Configuring the Argus Insight Web Server

The following profile switches are available only when the BO WEB URL profile switch is configured and Legacy Report profile switch is set to 1:

- Holiday Schedule Management
- Product Designated Medical Event Configuration
- Measurable Suppliers
- Site Configuration
- Acceptable Delay Justification Configuration

To configure these profile switches, refer to Argus Insight 7.0.2 Installation Guide.

Configuring the Cognos 10 Environment

This chapter describes how to configure the Cognos 10 environment. You must configure the Cognos 10 environment in the order specified in this guide.

This chapter includes the following topic:

- [Setting Up Cognos Server and Configuration for New Installation](#)

Before configuring the environment, verify that you have installed all required hardware and software. For more information, see [Section 1.2, "Software and Hardware Requirements."](#)

8.1 Setting Up Cognos Server and Configuration for New Installation

This section describes how to set up Cognos Server and configure your environment for a new installation of Argus Insight.

This section comprises the following sub-section:

- [Configuring IIS 7.0 on the Cognos 10 Server](#)
- [Configuring the Java Database Components](#)
- [Configuring Custom Java Authentication](#)
- [Configuring the Cognos 10 Environment](#)
- [Creating Cognos Data Source \(PRMART\)](#)
- [Configuring Cognos Security](#)
- [Configuring Roles and Permissions](#)

8.1.1 Configuring IIS 7.0 on the Cognos 10 Server

This section describes the following tasks that you must complete to configure Internet Information Services 7.0 (IIS 7.0) on the Cognos 10 Server:

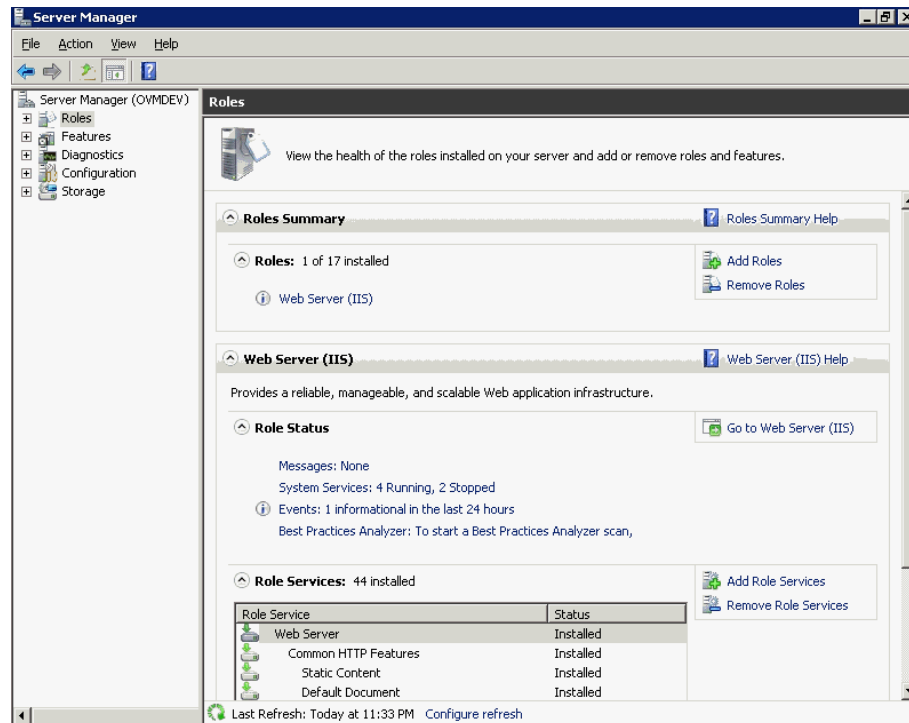
- [Checking that CGI or ISAPI Is Enabled in IIS](#)
- [Creating the Cognos 10 Virtual Directories](#)
- [Editing ISAPI or CGI Extensions](#)
- [Adding the Module Mapping](#)
- [Editing the Module Mapping](#)
- [Allowing CGI Application to Use Execute](#)

8.1.1.1 Checking that CGI or ISAPI Is Enabled in IIS

To check that CGI or ISAPI is enabled in IIS:

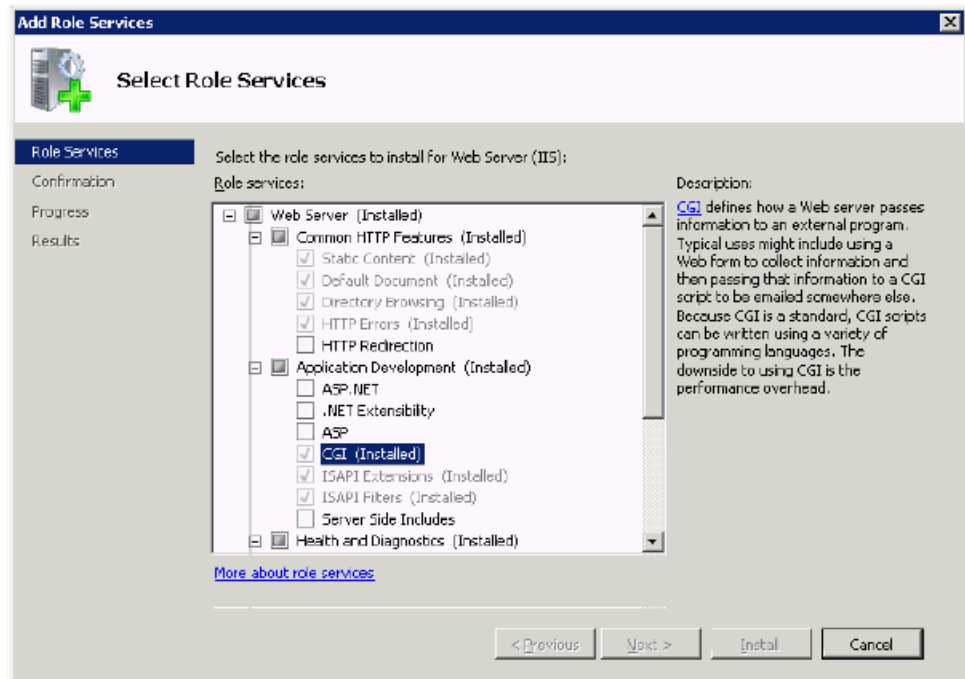
1. Click **Start**.
2. Navigate to **Administrative Tools**, and select **Server Manager**.

The Server Manager screen appears.



3. In the Role Services section, click the **Add Role Services** link.

The Add Role Services dialog box appears.

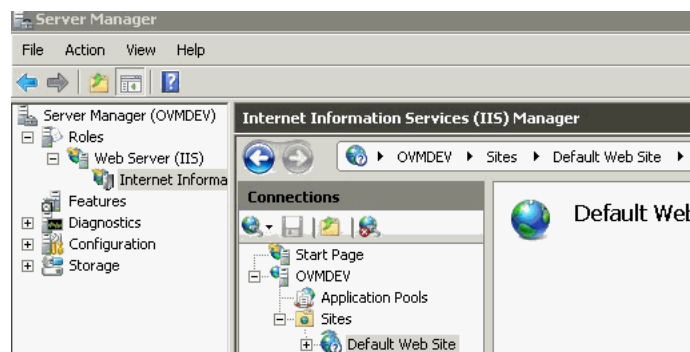


4. Expand **Application Development (Installed)**.
5. Verify that the CGI and ISAPI Extensions are listed as **(Installed)**.
 - If these role services are not installed, select the appropriate check box, and then click **Install**. Follow the instructions on the screen to complete the installation.
 - If these role services are already installed, click **Cancel**. The system returns to the Server Manager screen.

8.1.1.2 Creating the Cognos 10 Virtual Directories

To create the Cognos 10 virtual directories:

1. Navigate to **Roles > Web Server (IIS)**, and select **Internet Information Services (IIS) Manager**.
2. In Connections pane, expand the server node.
3. Expand **Sites**.



4. Right-click **Default Web Site**, and select **Add Virtual Directory**.
The Add Virtual Directory dialog box appears.

- a. In the **Alias** field, enter **Cognos 10**.
 - b. In the **Physical path** field, enter the complete path to the Cognos 10 Web content directory. The default path is:
drive:\Program Files\ibm\cognos\c10\webcontent
 - c. Click **OK**.
5. Right-click your newly-created Cognos 10 virtual directory, and select **Add Virtual Directory**.

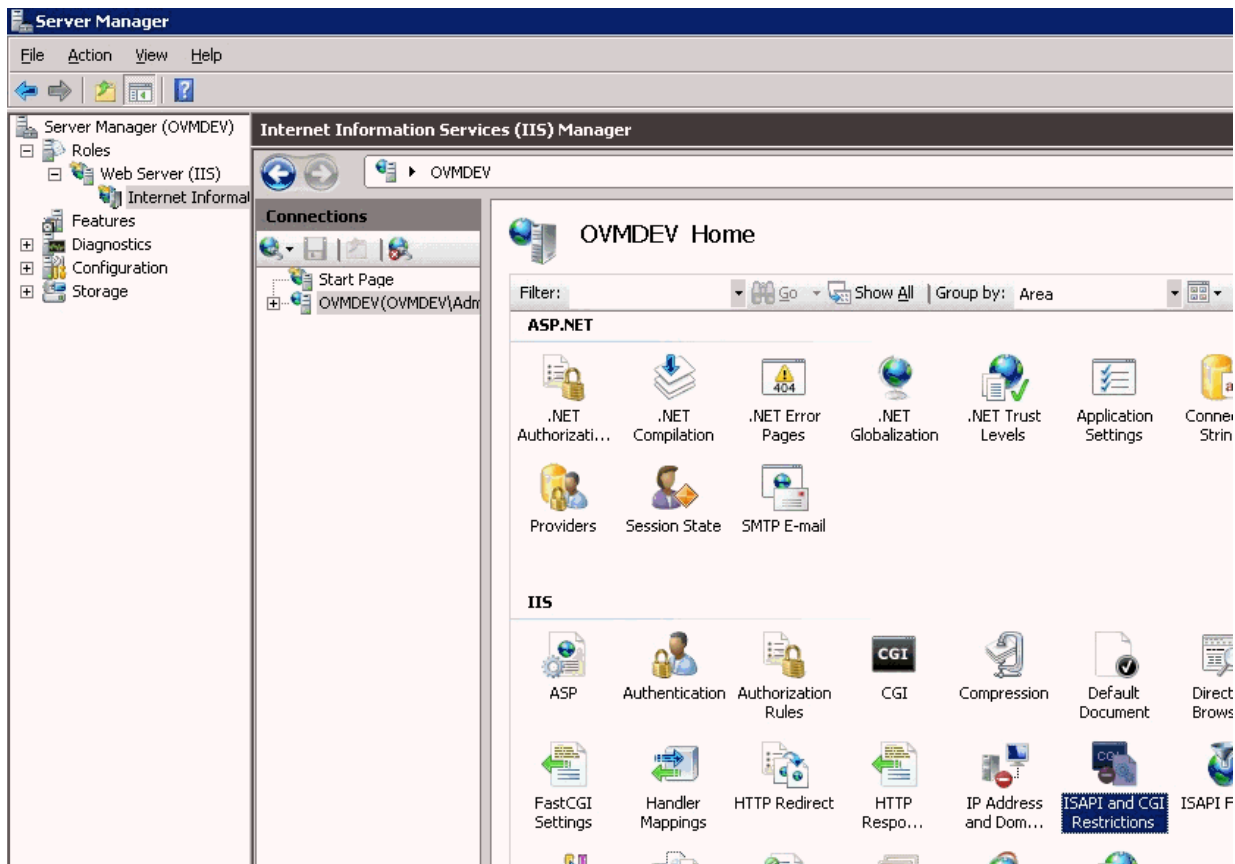
The Add Virtual Directory dialog box appears.

- a. In the **Alias** field, enter **cgi-bin**.
- b. In the **Physical path** field, enter the complete path to the Cognos 10 cgi-bin directory. The default path is:
drive:\Program Files\ibm\cognos\c10\cgi-bin
- c. Click **OK**.

8.1.1.3 Editing ISAPI or CGI Extensions

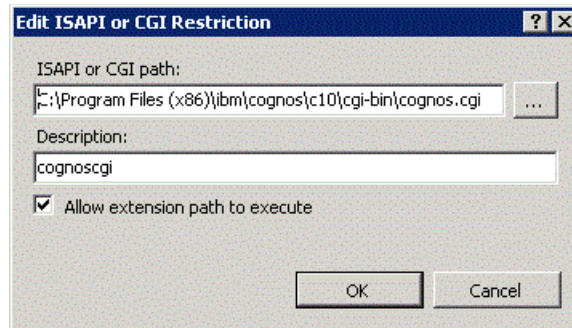
To edit the ISAPI or CGI extensions:

1. On Server Manager screen, in the Connections pane, select the server node.



2. Double-click the **ISAPI and CGI Restrictions** icon.
3. In the Actions pane, click the **Add**.

The Edit ISAPI or CGI Restriction dialog box appears.



- a. In the **ISAPI or CGI path** field, enter the path to either the cognos.cgi file or the cognosisapi.dll file depending on which one you will use.

Note: For Argus Insight, Oracle recommends that you use cognos.cgi. In addition, you may need to surround the path in double quotes if it contains any spaces.

The default path for each file is as follows:

drive:\Program Files\ibm\cognos\c10\cgi-bin\cognosisapi.dll

drive:\Program Files\ibm\cognos\c10\cgi-bin\cognos.cgi

- b. Select **Allow extension path to execute** check box.
- c. Click **OK**.

Alternative Method

1. In Connections pane, select the server node.
2. Double-click the **ISAPI and CGI Restrictions** icon.
3. In Actions pane, click the **Edit Feature Settings**.

The Edit ISAPI and CGI Restriction Settings dialog box appears.



4. Select the **Allow unspecified CGI Modules** check box.
5. Click **OK**.

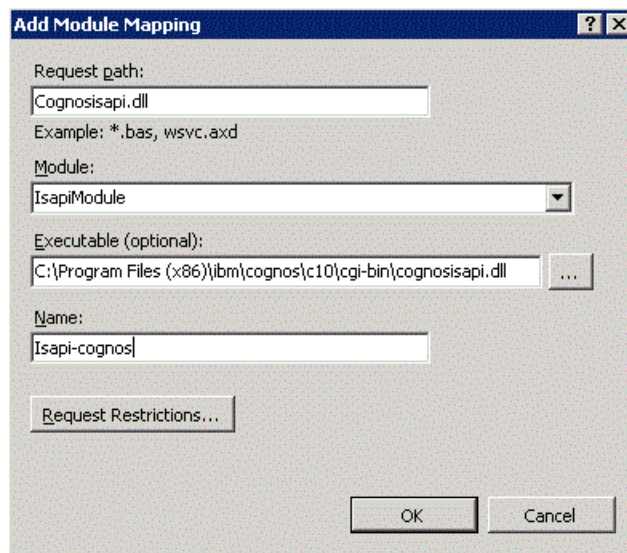
8.1.1.4 Adding the Module Mapping

To add the module mapping:

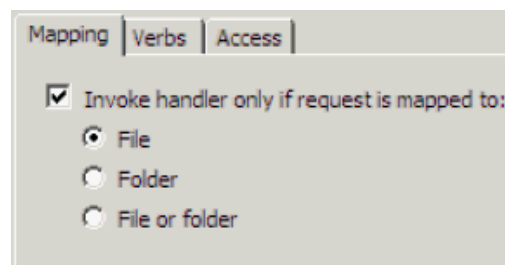
1. Open the Internet Information Services (IIS) Manager.
2. Expand the virtual directory folder, and click **cgi-bin**.

3. Double-click the **Handler Mappings** icon.
4. In the Actions pane, click the **Add Module Mapping**.

The Add Module Mapping dialog box appears.

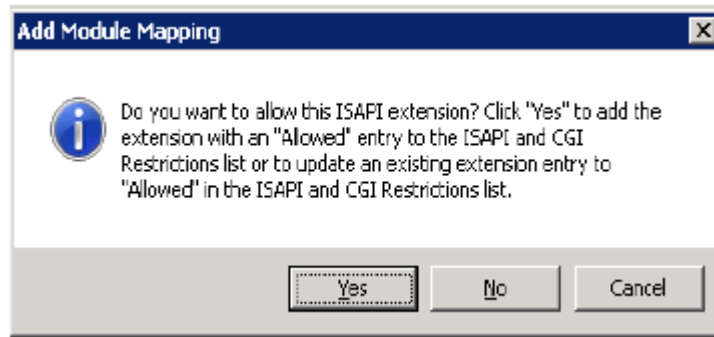


- a. In the **Request path** field, enter either *.cgi or *.dll as you need.
 - b. In the **Module** field, select either **CGIModule** or **IsapiModule** from the list.
 - c. In the **Executable** field, enter a value depending on the module you are using.
 If you are using an ISAPI Module, you must enter the complete path to the cognosisapi.dll. You can click the ellipsis icon to browse to the file location.
 If you are using a CGI Module, you do not need to enter a value in the Executable field.
 - d. In the **Name** field, enter a realistic name for this mapping. For example, ISAPI-Cognos.
5. Click **Request Restrictions**.
 - a. Click the **Mapping** tab, and select **Invoke handler only if request is mapped to: File**.



- b. Click the **Verbs** tab, and select **All verbs**.
 - c. Click the **Access** tab, select **Execute**.
 - d. Click **OK** to save changes.
 You return to the Add Module Mapping dialog box.
6. Click **OK**.

A message appears depending on the method used in [Section 8.1.1.3, "Editing ISAPI or CGI Extensions,"](#).



7. Click **Yes**.

The new module mapping is added to the Module Mapping list.

8.1.1.5 Editing the Module Mapping

For Cognos Administration to function properly, you must manually edit the directive that you added to the IIS configuration file in the previous step (see [Section 8.1.1.4, "Adding the Module Mapping"](#)).

To edit the module mapping:

1. Navigate to the following folder:

`COGNOS_HOME/c10/cgi-bin`

Note: Ensure that you have access permissions on the cgi-bin folder so you can save the changes you make to the web.config file.

2. Open the **web.config** file for editing.
3. Locate the appropriate **add name** statement in the web.config file.

For CGI, locate this statement:

```
<add name="CGI-cognos" path="*.cgi" verb="*" modules="CgiModule"
resourceType="Unspecified" />
```

For ISAPI, locate this statement:

```
<add name="ISAPI-Cognos" path="cognosisapi.dll" verb="*"
modules="IsapiModule" scriptProcessor="E:\Program Files\ibm\Cognos\C10\
cgi-bin\cognosisapi.dll" resourceType="Unspecified"
requireAccess="Execute" preCondition="bitness32" />
```

4. Add **allowPathInfo="true"** to the end of the statement.

For CGI:

```
<add name="CGI-cognos" path="*.cgi" verb="*" modules="CgiModule"
resourceType="Unspecified" allowPathInfo="true" />
```

For ISAPI:

```
<add name="ISAPI-Cognos" path="cognosisapi.dll" verb="*"
modules="IsapiModule" scriptProcessor="E:\Program Files\ibm\Cognos\C10\
```

```
cgi-bin\cognosisapi.dll" resourceType="Unspecified"
requireAccess="Execute" precondition="bitness32" allowPathInfo="true"/>
```

5. Save changes and close the web.config file.

8.1.1.6 Allowing CGI Application to Use Execute

To allow the CGI application to use execute:

1. Open the Internet Information Services (IIS) Manager.
2. Expand the virtual directory folder, and click the **cgi-bin**.
3. Double-click the **Handler Mappings** icon.
4. In the Actions pane, click the **Edit Feature Permissions**.

The Edit Features Permissions dialog box appears.

5. Select the **Execute** check box.
6. Click **OK**.

8.1.2 Configuring the Java Database Components

To configure the Java Database Components (JDBC) in the Cognos 10 environment:

1. Navigate to the following Oracle installation path:
Oracle_Installation_Path\product\Oracle_Version\client_1\sqldeveloper\jdbc\lib
2. For Oracle 11g client, copy the **ojdbc5.jar** file, and for Oracle 12c client, copy **ojdbc6.jar** to the following location on the Cognos 10 environment:
Cognos_Installation_Path\c10\webapps\p2pd\web-inf\lib

8.1.3 Configuring Custom Java Authentication

This section comprises the following sub-sections:

- [Configuring Custom Java Authentication for Windows](#)
- [Configuring Custom Java Authentication for Linux](#)

8.1.3.1 Configuring Custom Java Authentication for Windows

To configure custom Java authentication for Windows:

1. Go to IBM Cognos Administration and stop the Cognos services.
2. Copy the **CAM_AAA_JDBC_PowerReports.jar** file from the following location:
`\\Argus_Insight_Server\Argus_Insight_Install_Path\java Authentication\JDBC_PowerReport`
 To the following location on the Cognos 10 Server:
`\\Cognos_10_Install_Path\ c10\webapps\p2pd\WEB-INF\lib`
3. Copy the **JDBC_Config_PowerReports.properties** file from the following location:
`\\Argus_Insight_Server\Argus_Insight_Install_Path\java Authentication\JDBC_PowerReport`
 To the following location on the Cognos 10 Server:
`\\Cognos_10_Install_Path\ c10\Configuration`

4. Define the configuration parameters:
 - a. Navigate to the following folder:
`\\Cognos_10_Install_Path\ c10\Configuration`
 - b. Open the **JDBC_Config_PowerReports.properties** file for editing.
 - c. Modify the existing values of the following parameters only if the database changed from the 7.0 database:

| Parameter | Value to Enter |
|------------------------------|---|
| Server | Enter the IP address or the name of the Database Server. |
| SID | Enter the instance/service name of the Argus Insight data mart. |
| Port | Enter the database port number. |
| COGNOS_SINGLE_SIGN_ON_HEADER | Enter the header name in which Single Sign On user name will be populated by SSO solution, that is, HEADER_OAM_REMOTE_USER. |

- d. Save and close the file.
5. Copy **AI.ini** and **ArgusSecureKey.ini** from the following location:
`\\<Argus_Insight_Server>\Windows`
 To the following location:
`\\Cognos_10_Install_Path\C10\configuration`
6. Navigate to the following folder:
`Program Files\ibm\cognos\c10\bin\jre\6.0\lib\security`
7. Backup **local_policy.jar** and **US_export_policy.jar** files.
8. Download the policy files corresponding to the version of installed JRE.

Note: To find the version of installed JRE:

- For Cognos 32 bit, go to `bin/jre/version`
 - For Cognos 64 bit, go to `bin64/jre/version`
-

For example, to install policy files of JRE version 6, execute the following steps:

- a. Go to the following URL:
`https://www14.software.ibm.com/webapp/iwm/web/preLogin.do?source=jcesdk`
- b. Log in to the IBM site.
- c. Select the files for *Java 5.0 SR16*, *Java 6 SR13*, *Java 6 SR5 (J9 VM2.6)*, *Java 7 SR4*, and all later releases option, and click **Continue**.
- d. Click **I agree**, to agree to the license terms, and then select **I confirm**.
- e. Click **Download Now**.
- f. Download the files and extract into a folder.
- g. Locate **local_policy.jar** and **US_export_policy.jar** files in the extracted folder.

- h. Copy these jar files into the following folder:

drive:\Program Files\ibm\cognos\c10\bin(bin64 in case Cognos is 64 bit)\jre\6.0\lib\security

9. Go to IBM Cognos Administration, and restart the Cognos services.

8.1.3.2 Configuring Custom Java Authentication for Linux

To configure custom Java authentication for Linux:

1. Go to IBM Cognos Administration and stop the Cognos services.
2. Copy the **CAM_AAA_JDBC_PowerReports.jar** file from the following location:

\\Argus_Insight_Server\Argus_Insight_Install_Path\java Authentication\JDBC_PowerReport

To the following location on the Cognos 10 Server:

\\Cognos_10_Install_Path\ c10\webapps\p2pd\WEB-INF\lib

3. Copy the **JDBC_Config_PowerReports.properties** file from the following location:

\\Argus_Insight_Server\Argus_Insight_Install_Path\java Authentication\JDBC_PowerReport

To the following location on the Cognos 10 Server:

\\Cognos_10_Install_Path\ c10\Configuration

4. Define the configuration parameters:
 - a. Navigate to the following folder:
\\Cognos_10_Install_Path\ c10\Configuration
 - b. Open the **JDBC_Config_PowerReports.properties** file for editing.
 - c. Modify the existing values of the following parameters only if the database changed from the 7.0 database:

| Parameter | Value to Enter |
|------------------------------|---|
| Server | Enter the IP address or the name of the Database Server. |
| SID | Enter the instance/service name of the Argus Insight data mart. |
| Port | Enter the database port number. |
| COGNOS_SINGLE_SIGN_ON_HEADER | Enter the header name in which Single Sign On user name will be populated by SSO solution, that is, HEADER_OAM_REMOTE_USER. |

- d. Save and close the file.
5. Copy **AI.ini** and **ArgusSecureKey.ini** from the following location:

\\<Argus_Insight_Server>\Windows

To the following location:

\\Cognos_10_Install_Path\C10\configuration

6. Navigate to the following folder:
JAVA_HOME\jre\6.0\lib\security

7. Backup **local_policy.jar** and **US_export_policy.jar** files.
8. Download the policy files corresponding to the version of installed JRE.

Note: To find the version of installed JRE, go to the JAVA_HOME and check the folder name under the JRE folder.

For example, to install policy files of JRE version 6, execute the following steps:

- a. Go to the following URL:
<http://www.oracle.com/technetwork/java/javase/downloads/jce-6-downloads-429243.html>
 - b. Download **local_policy.jar** and **US_export_policy.jar** files in the extracted folder.
 - c. Copy these jar files into the following folder:
JAVA_HOME\jre\6.0\lib\security
 - d. If the Replace Files dialog box appears, click **Yes**.
9. Go to IBM Cognos Administration, and restart the Cognos services.

8.1.4 Configuring the Cognos 10 Environment

This section describes the following tasks that you must complete to configure the Cognos 10 environment:

- [Opening the IBM Cognos 10 Configuration Window](#)
- [Setting the Security Properties for Cognos 10](#)
- [Setting the Data Access Properties for Cognos 10](#)
- [Creating the Namespace for Argus Insight Authentication](#)
- [Saving the Configuration and Starting the Cognos 10 Service](#)

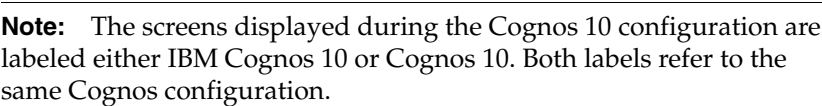
8.1.4.1 Opening the IBM Cognos 10 Configuration Window

You use the options in the IBM Cognos 10 Configuration screen to define environment group and logging properties, security properties, and data access properties.

To open the IBM Cognos 10 Configuration screen:

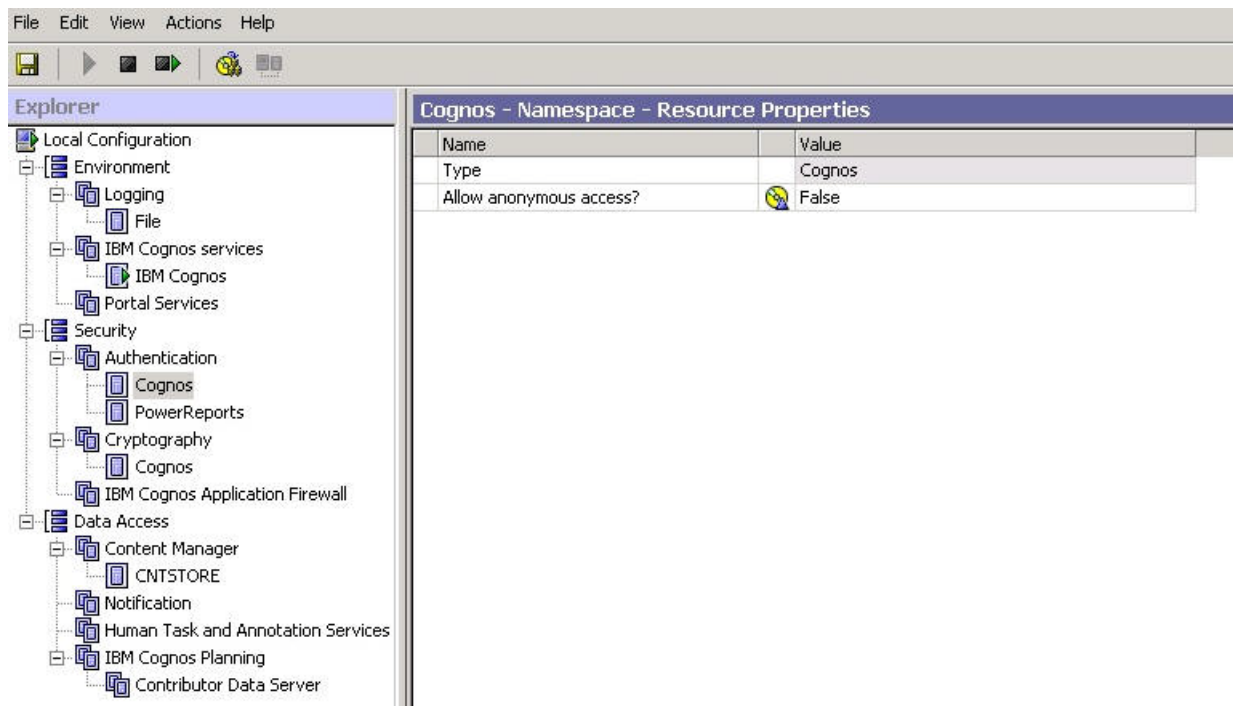
1. Click **Start**.
2. Navigate to **All Programs > IBM Cognos 10**, and then select **IBM Cognos Configuration**.

The IBM Cognos Configuration screen appears.

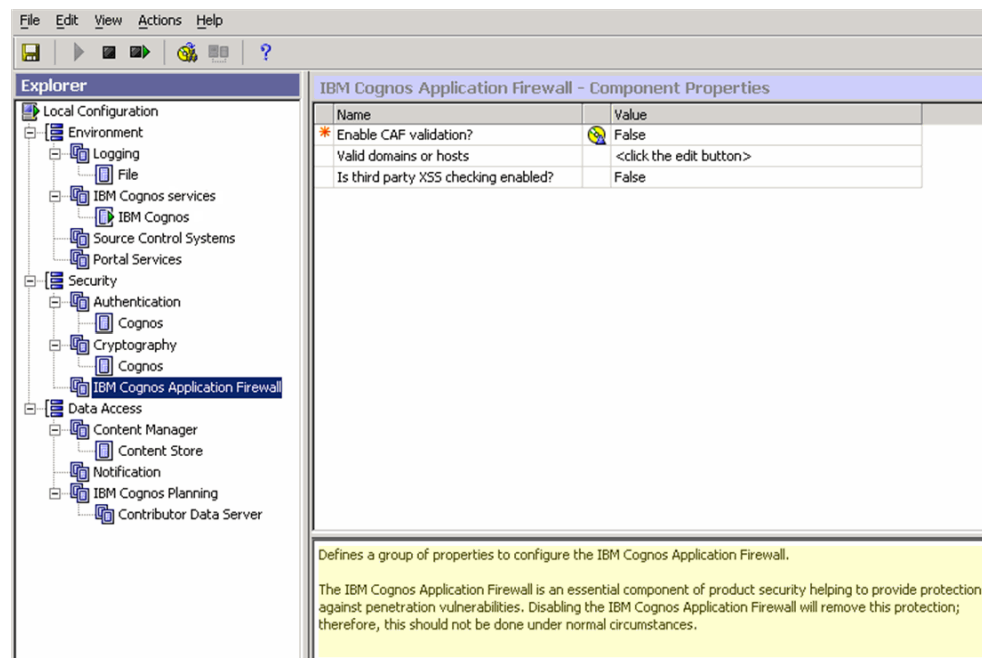


To define the security properties:

1. Open the IBM Cognos 10 Configuration screen.
2. Navigate to **Security > Authentication**, and select **Cognos**.



3. Set the **Allow anonymous access?** property to **True**.
4. Navigate to **Security**, and select **IBM Cognos Application Firewall**.



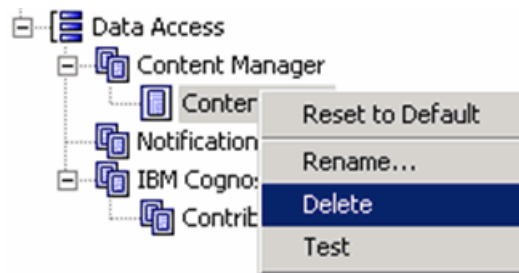
5. Set the **Enable CAF validation?** property to **False**.

8.1.4.3 Setting the Data Access Properties for Cognos 10

To define the data access properties:

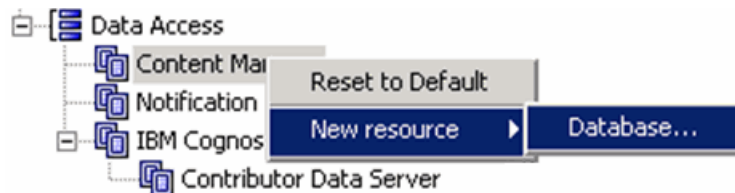
1. Open the IBM Cognos 10 Configuration screen.

2. Navigate to **Data Access > Content Manager**, right-click **Content Store**, and then select **Delete** from the menu.



A confirmation messages appears.

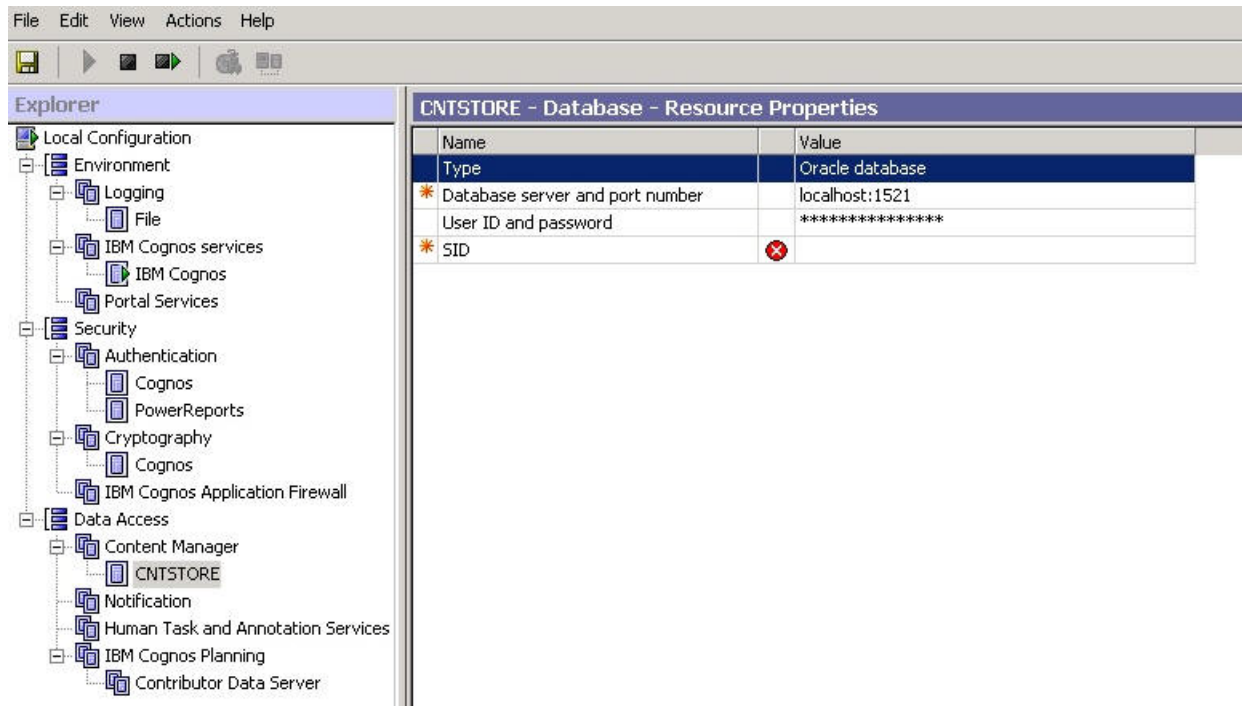
3. Click **Yes**.
4. Navigate to **Data Access**, right-click **Content Manager**, select **New resource**, and then select **Database**.



5. Complete the New Resource - Database dialog box as follows:
 - In the **Name** field, enter **CNTSTORE**.
This is the name of the database resource.
 - In the **Type** field, select **Oracle database**.
 - Click **OK**.

You return to the IBM Cognos Configuration screen.

The resource property for the database of the newly-created CNTSTORE resource database appears.



6. Enter the value for the **Database server and port number** as:

Database_Server_Name:1521

where:

Database_Server_Name is the name of the server where your content store database is stored.

7. Select **User ID and password**, and click the icon next to it.

The Value - User ID and password dialog box appears.

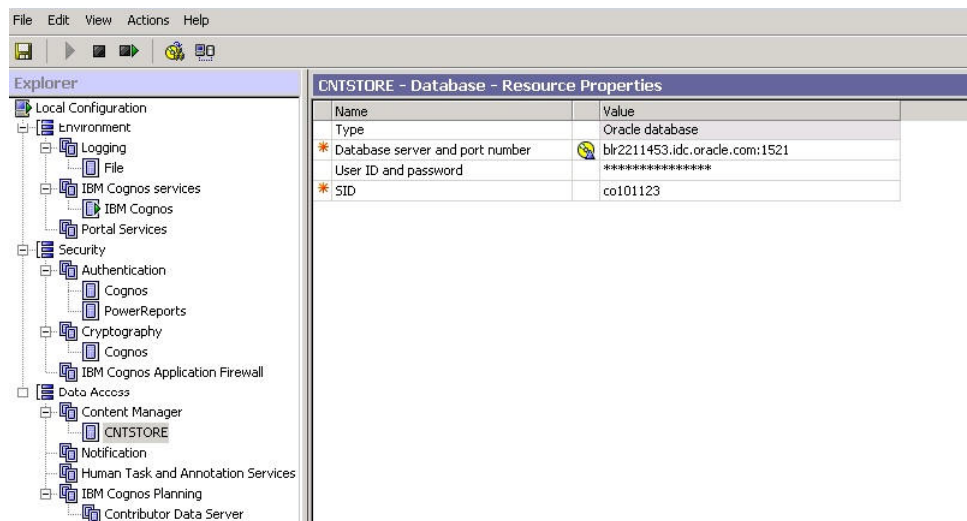
- In the **User ID** field, enter the ID for the content store database user.
- In the **Password** field, enter the password for the content store database user.
- In the **Confirm password** field, re-enter the password for verification.
- Click **OK**.

Note: The contents store database user is created in the Cognos content store database. This user is given grants of Connect, Resource, and Create View, along with Unlimited Tablespace Grant.

The character set of the Cognos content store database should only be UTF.

Make sure that the content store database entry is added in the TNSNames.ora file on the Cognos 10 server.

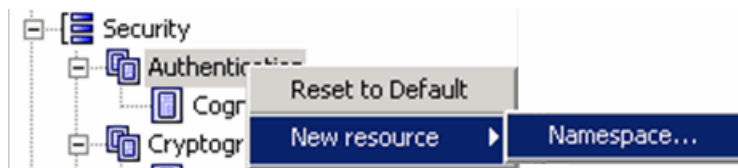
8. In the **Service name** field, enter the database instance name for the Cognos 10 repository.



8.1.4.4 Creating the Namespace for Argus Insight Authentication

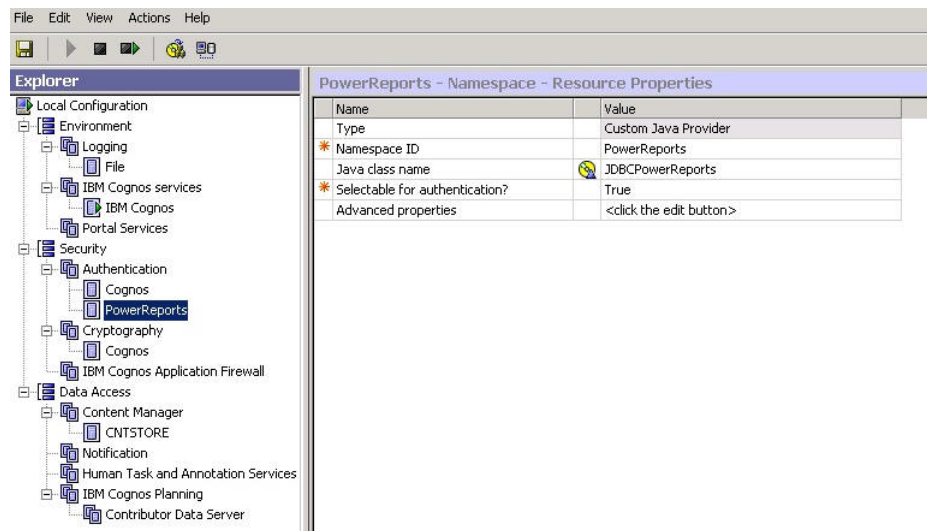
To create the namespace for Argus Insight authentication:

1. Open the IBM Cognos 10 Configuration screen.
2. Navigate to **Security**, right-click **Authentication**, click **New resource**, and then select **Namespace**.



3. Complete the New Resource – Namespace dialog box as follows:
 - In the **Name** field, enter **PowerReports**.
 - In the **Type** field, enter **Custom Java Provider**.
 - Click **OK**.

The PowerReports - Namespace - Resource Properties screen appears.

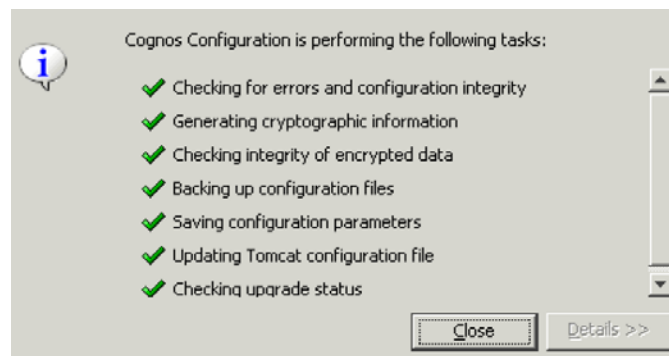


4. Set the **Namespace ID** property to **PowerReports**.
5. Set the **Java class name** property to **JDBCPowerReports**.

8.1.4.5 Saving the Configuration and Starting the Cognos 10 Service

To save the configuration and start the Cognos 10 service:

1. Open the File menu, and select **Save** to save changes to the configuration settings.
- An information dialog box appears and lists each task as it is performed.



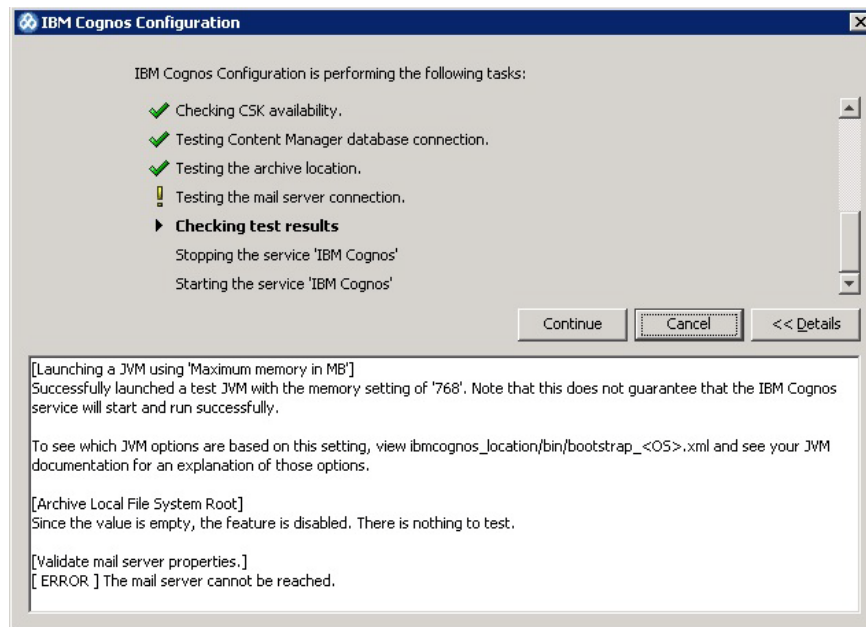
2. Click **Close** when the system completes all the configuration tasks.
3. In the IBM Cognos Configuration screen, click the **Start** icon to run the Cognos 10 service.



The system begins to run the IBM Cognos 10 service.

- If there are no problems with the configuration, the system completes the test phase and starts the IBM Cognos 10 service successfully.

- If there are possible problems with the configuration, the system stops running the service and displays a warning message. When you click **OK** to acknowledge the warning message, the system opens another dialog box with more information. For example:



At this point:

- For more information about the warnings and errors, click **Details**.
- To stop the process, click **Cancel**.

If the warnings or errors are due to reasons other than mail server connection failure, cancel the process and check your configuration again.

- To ignore the warnings and errors, and complete the process of starting the IBM Cognos 10 service, click **Continue**.

For example, you may ignore warnings that the mail server cannot be reached (see the previous illustration).

4. Click **Close** to exit.
5. Open the **File** menu, and select **Exit** to exit from the IBM Cognos 10 configuration.

8.1.5 Creating Cognos Data Source (PRMART)

To create Cognos Data Source (PRMART):

1. Log in to the Cognos 10.

The IBM Cognos 10 home page appears.

Note: If your security settings on the server do not permit you to view the Cognos connection, add the site URL (http://Cognos_10_Server/cognos10) to the list of local intranet sites.

2. Under Administration section, click **Administer IBM Cognos content**.

The IBM Cognos Administration screen appears.

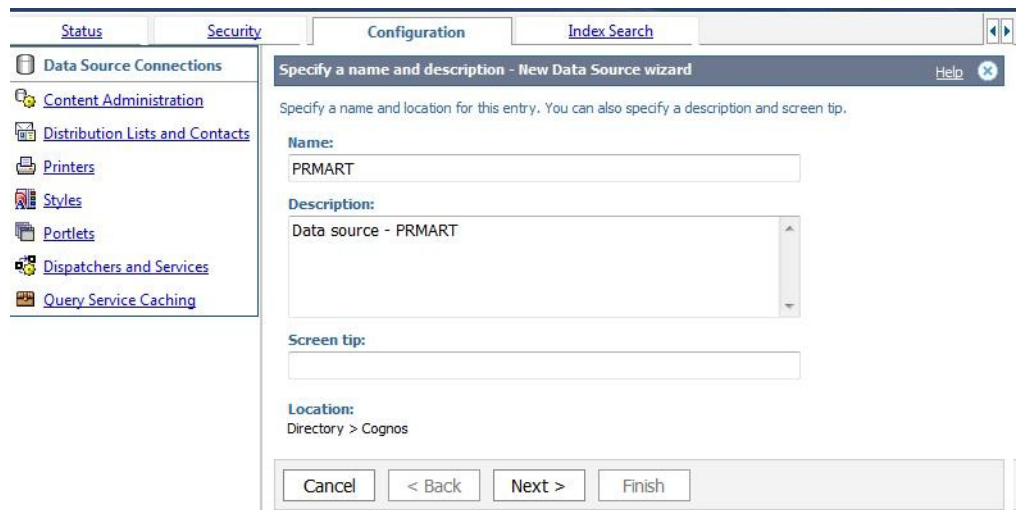
3. Click the **Configuration** tab.
4. Click **Data Source Connections**.
5. Click **New Data Source** icon.

The Specify a name and description - New Data Source Wizard screen appears.

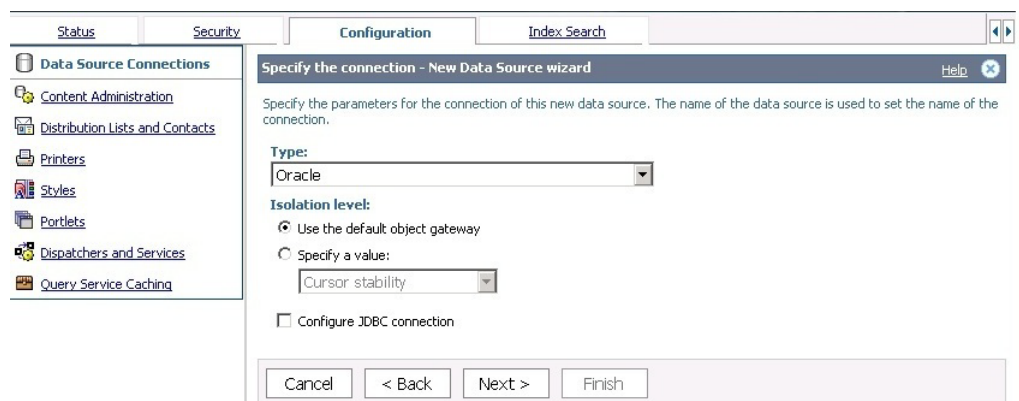


6. Enter the **Name** and **Description** of the data source, and click **Next**.

The Specify the connection - New Data Source Wizard screen appears.



7. Specify parameters for the connection, and click **Next**.



8. On the Configuration tab:
 - a. In **SQL *Netconnect string:** field, enter the connection string.

For example,

```
(DESCRIPTION=(ADDRESS_
LIST=(ADDRESS=(PROTOCOL=TCP)(HOST=<hostname>)(PORT=<Port>)))
CONNECT_DATA=(SERVICE_NAME=<Service Name>)))
```


- b. In the **Signon** section, select **User ID** check box, and enter details in the **User ID**, **Password**, and **Confirm password** fields.
- c. In the **Testing** section, click **Test the connection...**

The screenshot shows the Cognos Configuration console with the **Configuration** tab selected. The left-hand navigation pane lists various components, with **Data Source Connections** expanded. The main pane displays the **Signon** configuration for a new connection string. The **SQL*Net connect string** is set to `(DESCRIPTION=(ADDRESS_LIST=(ADDRESS=(PROTOCOL=`. The **Collation sequence** is empty. Under the **Signon** section, the **User ID** checkbox is checked, and the **Password** and **Confirm password** checkboxes are also checked. The **Create a signon that the Everyone group can use** checkbox is checked. The **User ID**, **Password**, and **Confirm password** fields are empty. The **Testing** section at the bottom has a **Test the connection...** link. At the bottom of the console are buttons for **Cancel**, **< Back**, **Next >**, and **Finish**.

9. Click **Next**, and specify the commands for connection.

The screenshot shows the Cognos Configuration console with the **Configuration** tab selected. The left-hand navigation pane lists various components, with **Data Source Connections** expanded. The main pane displays the **Specify the commands - New Data Source wizard**. The wizard title bar includes a **Help** button and a close button. The main area contains the text "Specify the commands that the database executes when certain events occur." Below this is a table with columns **Name** and **Value**. The table has four rows, each with a checkbox in the **Name** column and a **Value** column. The **Value** column contains the text "(None)" and a **Set...** link. The **Clear** button is located at the bottom right of the table. At the bottom of the console are buttons for **Cancel**, **< Back**, **Next >**, and **Finish**.

| Name | Value |
|--|-------------------------------|
| <input type="checkbox"/> Open connection commands | (None) Set... |
| <input type="checkbox"/> Open session commands | (None) Set... |
| <input type="checkbox"/> Close session commands | (None) Set... |
| <input type="checkbox"/> Close connection commands | (None) Set... |

For more information on Cognos commands, refer to *Argus Insight Extensibility Guide* > *Section 5.3.2 Applying Argus Data Security* and *Section 5.3.3 Applying Enterprise Security*.

10. Click **Finish**.

The PRMART data source is created.

8.1.6 Configuring Cognos Security

This section includes the following topics:

■ Activating the PowerReports Namespace

8.1.6.1 Activating the PowerReports Namespace

To activate the PowerReports namespace:

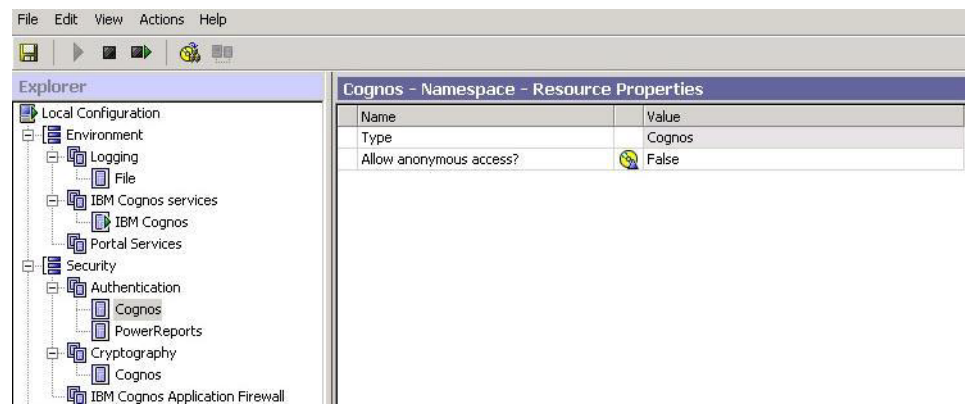
1. Open the Cognos 10 configuration.
2. Click **Start > All Programs > IBM Cognos 10**, and then select **IBM Cognos Configuration**.

The IBM Cognos Configuration screen appears.

3. Navigate to **Security > Authentication**, and then select **Cognos**.

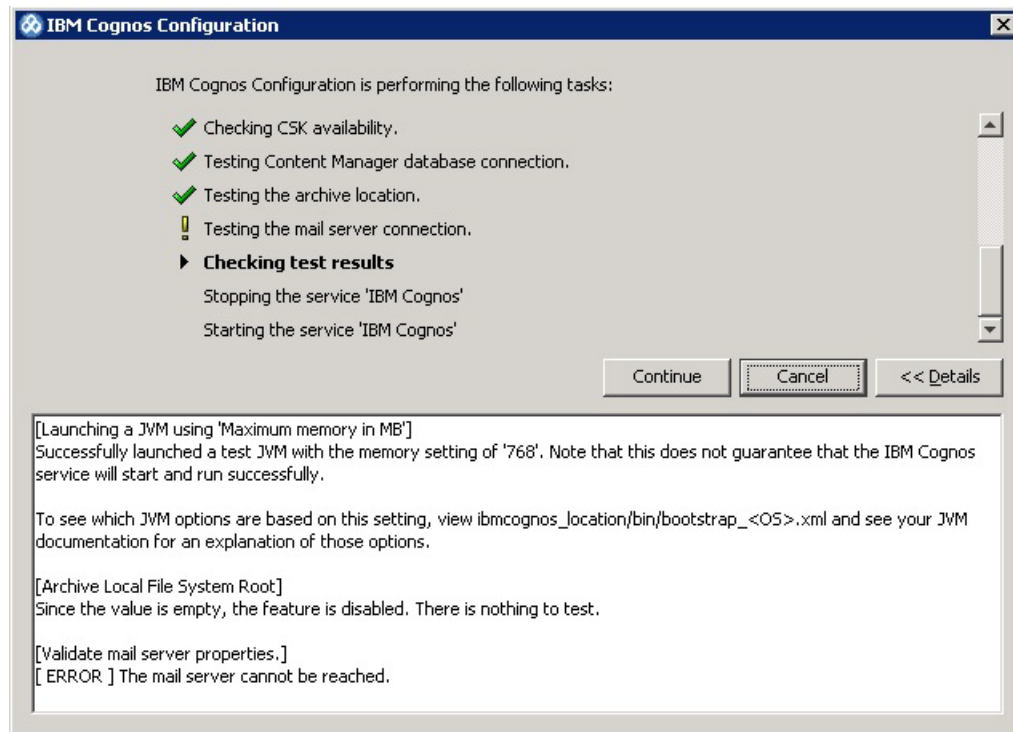
The Cognos - Namespace - Resource properties screen appears.

4. Set the **Allow Anonymous access?** property to **False**.

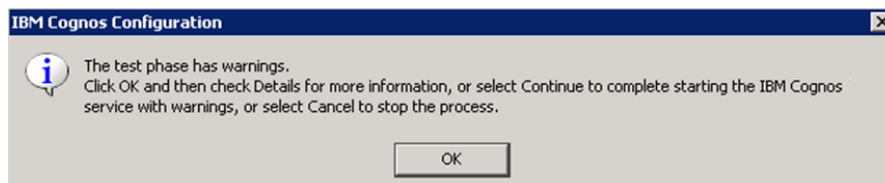


5. From the File menu, select **Save**.
6. From the Actions menu, select **Restart** to restart the Cognos 10 service.

The status information about each task being performed during the restart appears.



During the Cognos service restart, a warning message may appear.



7. Process any warning message as follows:

- a. Click **OK**.
- b. To obtain more information about the warning, click **Details**.

Depending on the type of warning:

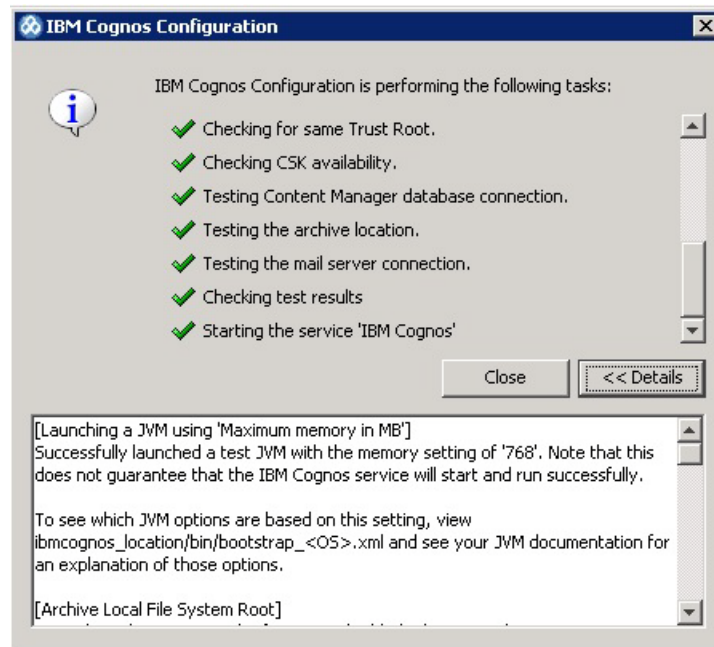
— To ignore the warning and continue with the process of restarting the IBM Cognos 10 service, click **Continue**.

For example, you may want to ignore a warning that the connection to the mail server failed.

— To stop the restart process, click **Cancel**.

If the warnings are due to reasons other than a mail server connection failure, you should stop the process, check your configuration, and then restart the IBM Cognos 10 service.

8. Wait until the all the configuration tasks are processed and the status for each task appears.



9. Click **Close** to exit the Cognos configuration.

Note: Make sure that you remove the **Everyone** user group from the **Directory Administrator** and **System Administrator** roles of Cognos. Before doing this, make sure that you have a valid user as part of the **System Administrator** role in Cognos.

If you have not added any user as part of the System Administrator role in Cognos, then you have to add Everyone user group in System Administrator roles of Cognos again.

To add the **Everyone** user group in the System Administrator role of Cognos:

1. Connect to the Content Store database as the content store user.
 2. Navigate to the following folder:
Cognos_10_Install_Path\C10\configuration\schemas\content
 3. Run the **AddSysAdminMember.sql** script.
 4. Commit the changes.
-

8.1.7 Configuring Roles and Permissions

To configure enterprise specific roles and permissions:

1. Log in to the Cognos 10 Server as an administrator user.
2. Create an Enterprise-specific role for each enterprise. For example:
 - ENT1_Role for Enterprise 1
 - ENT2_Role for Enterprise 2
3. Add all users belonging to the specific enterprises to their respective roles. For example:
 - Add ENT1_user to ENT1_Role

Note: If a user is a member of multiple enterprises, the user must be added to the roles for all the enterprises.

4. Create a folder in Public Folders for each enterprise. For example:
 - ENT1_Folder for Enterprise 1
 - ENT2_Folder for Enterprise 2
5. Select the required permissions of the Enterprise-specific role for the Enterprise-specific folder. For example,
 - Add ENT1_Role to the ENT1_Folder and provide the Read, Write, Execute, and Traverse permissions on this folder.

Configuring the OBIEE Environment

This chapter includes the following topics:

- [Pre-installation Configuration](#)
- [Configuring the OBIEE Repository and Web catalog](#)
- [Creating Users and Groups in OBIEE](#)
- [OBIEE Default Application Roles](#)

9.1 Pre-installation Configuration

Prior to integrating OBIEE with Argus Insight, the following tasks must be completed:

1. Since the data for analysis is based on Argus Mart schema and not the Insight Mart schema, the TNS entry for the Argus Mart schema should be present in the OBIEE 11g home in the path:

`<OracleBI Home>\Oracle_BI1\network\admin\tnsnames.ora`

2. Set up the TNS for Oracle Client Home in the PATH variable.
3. Run the Argus Mart Schema creation tool.

When the tool is run, the new tables, indexes, packages and all the objects required for OBIEE will be created in the Argus Mart schema.

Additionally, a read only user AM_BI_USER with read-only privileges on BI Objects will be created.

For detailed information on installation and upgrade of Argus Mart schema, refer to *Oracle Argus Mart Installation Guide*.

9.2 Configuring the OBIEE Repository and Web catalog

This section comprises the following sub-section:

- [Prerequisites](#)
- [Deployment of OBIEE Repository and Catalog](#)
- [Post-deployment of Oracle Argus Insight RPD](#)

9.2.1 Prerequisites

Ensure OBIEE 11g (11.1.1.7.1) is installed and the Administrator Console and the Enterprise Manager (Fusion Middleware Control) is running by checking the following URLs:

- <http://<machinename>.<port>/console>
- <http://<machinename>.<port>/em>

Note: Port 7001 is the default Weblogic port. It may change based upon the system configuration. Please check with your Oracle Weblogic administrator for the correct port number if the above port does not work as expected.

9.2.2 Deployment of OBIEE Repository and Catalog

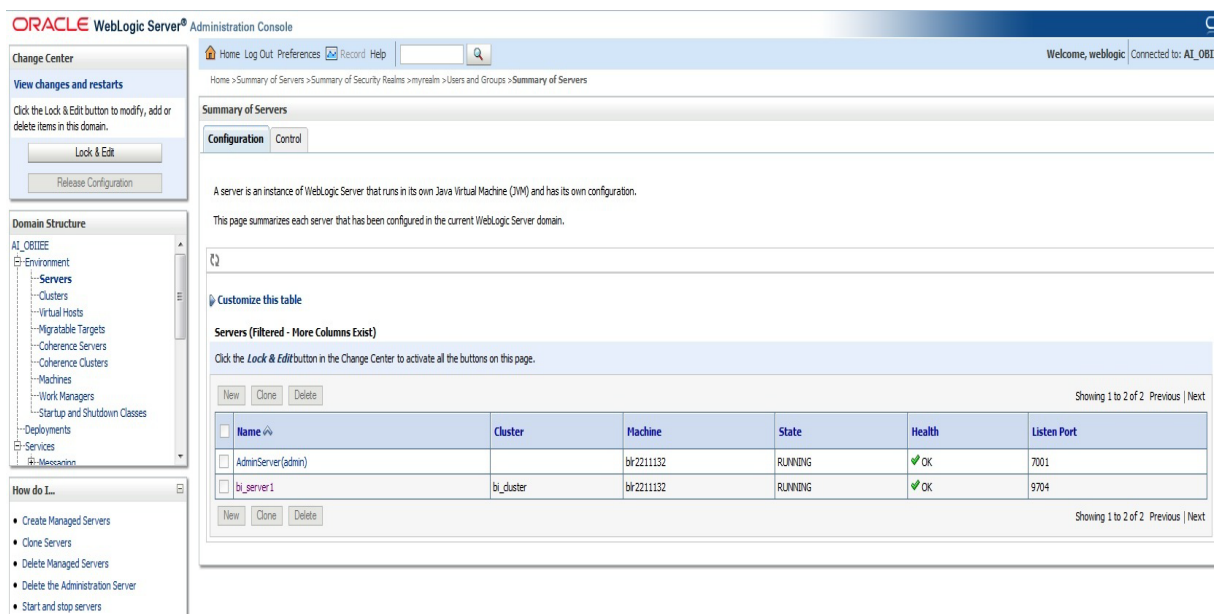
Note: The default password for the ArgusInsight.rpd repository file is **insight123**. You may change this password, as per your requirement prior to deployment in OBIEE, using the OBIEE Administrator Tool, see [Section 9.2.3.2, "Changing the OBIEE RPD Password"](#).

You must remember to use this password in the steps mentioned below.

The following are the steps to deploy OBIEE repository and catalog:

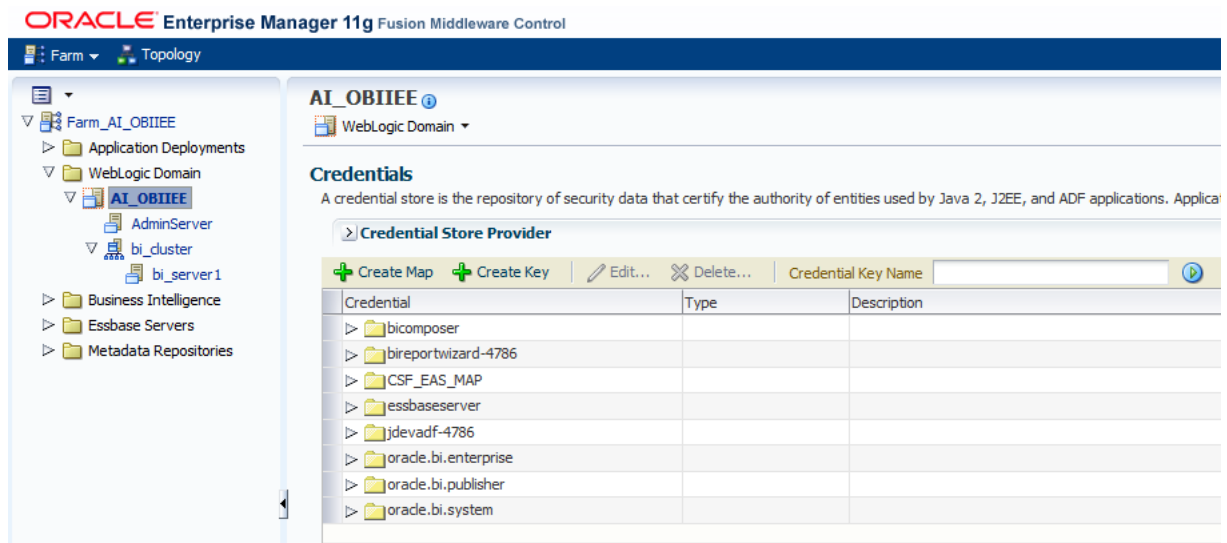
1. Log in to the Console and ensure that the BI_Server is up and running.

Figure 9–1 Oracle WebLogic Server Administration Console



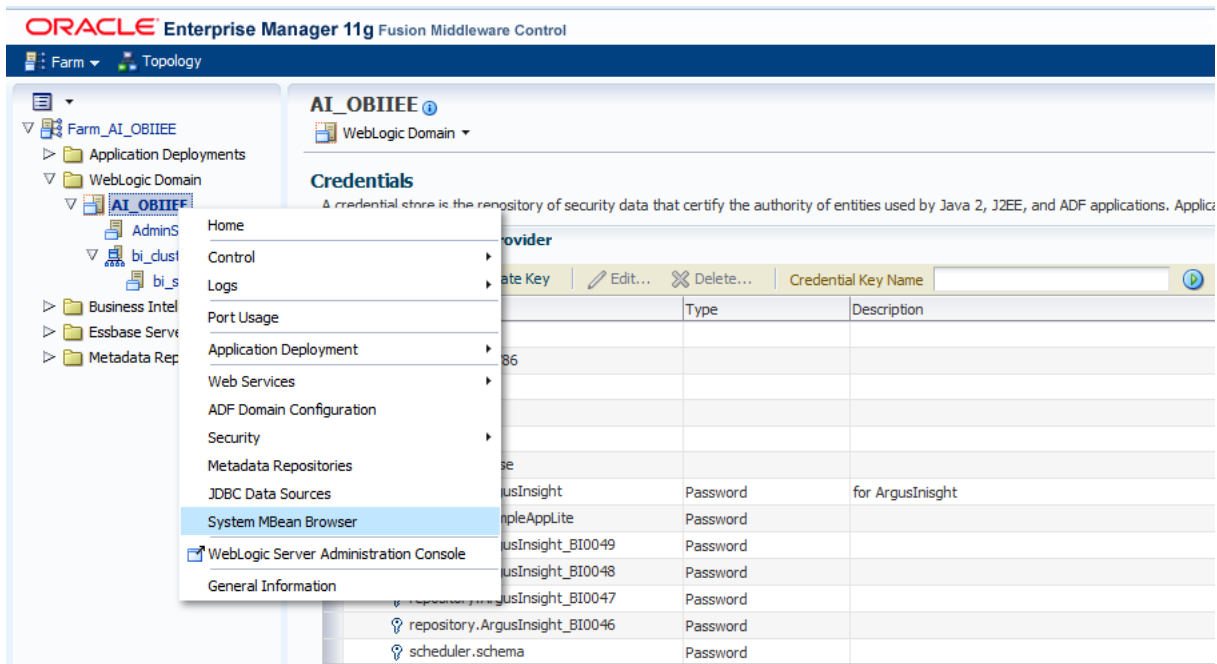
2. Log in to EM, and create an encrypted key entry in the EM for the Oracle Argus Insight RPD.
 - a. Expand the tree node Weblogic Domain and click on the bifoundation_domain (the domain created for OBIEE), and invoke the menu Weblogic Domain > Security > Credentials to give the screen as shown here:

Figure 9–2 The bifoundation_domain Screen



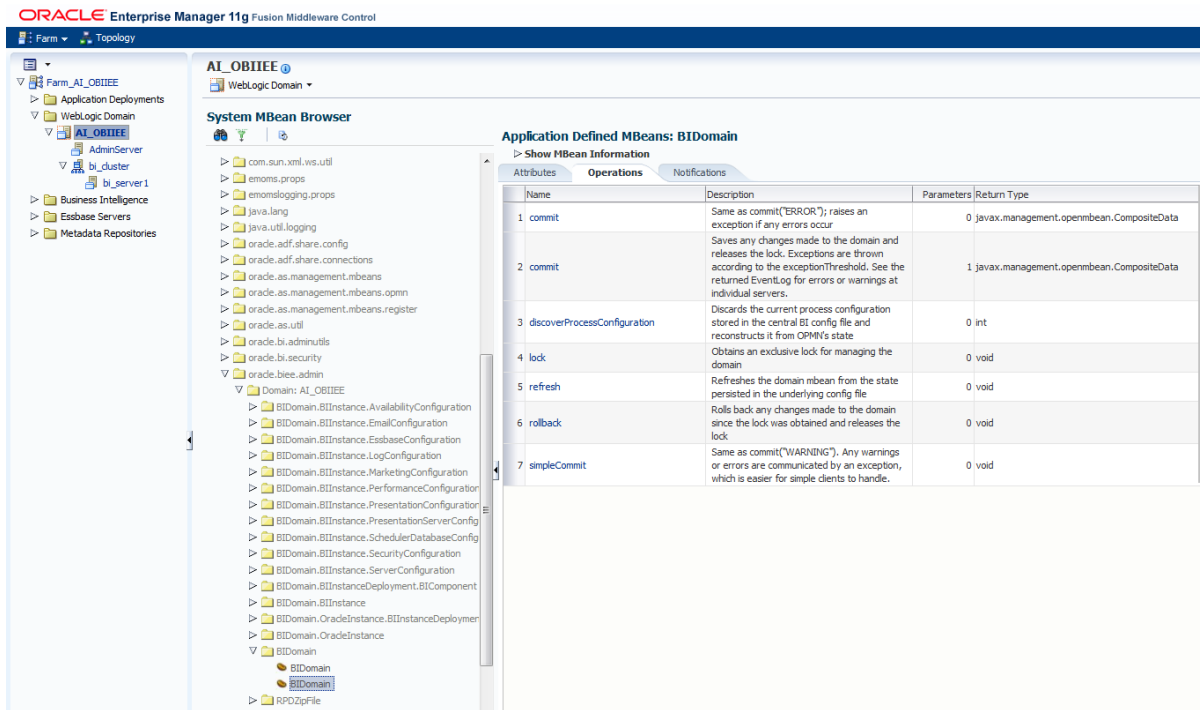
- b. Click **Create Key**, and enter the following details for the ArgusInsight rpd file:
 - Select Map: oracle.bi.enterprise
 - Key: repository.ArgusInsight
 - Type: password
 - User Name: Administrator
 - Password: password of choice
 - c. Click **OK** to create the security key.
 3. Invoke the System MBean Browser.

Figure 9–3 The WebLogic Domain Drop-down List



4. Navigate to the MBean Application Defined MBeans > oracle.biee.admin > Domain: bifoundation_domain > BIDomain > BIDomain.

Figure 9–4 The Application Defined MBeans — Operations Screen

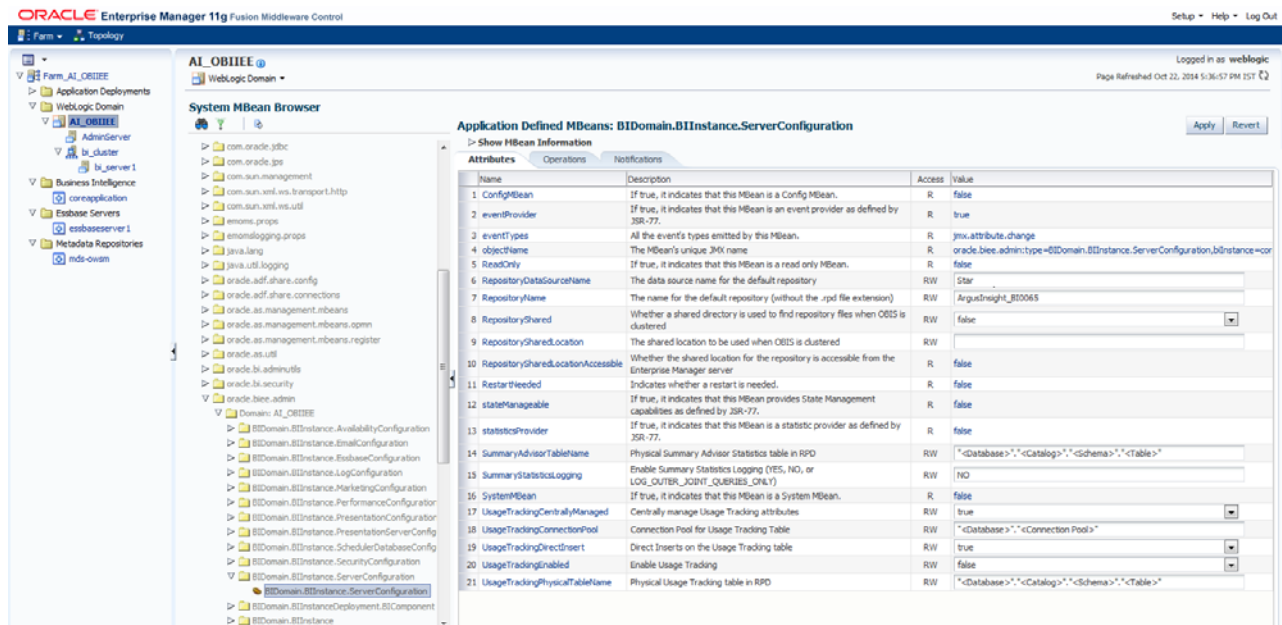


5. Navigate to the Operations tab and click **lock**, and then click **Invoke** to lock the domain.

6. In the same window navigate to the Domain: bifoundation_domain > BIDomain.BIInstance.ServerConfiguration - BIDomain.BIInstance.ServerConfiguration.

In the Attributes tab, change the attribute RepositoryName as **ArgusInsight**, and click **Apply**.

Figure 9–5 The Application Defined MBeans — Attributes Screen



7. Navigate to Domain: bifoundation_domain > BIDomain.BIInstance.PresentationServerConfiguration > BIDomain.BIInstance.PresentationServerConfiguration.

In the Attributes tab, change the attribute WebCatalogSharedLocation as \$ORACLE_INSTANCE/bifoundation/OracleBIPresentationServicesComponent/\$COMPONENT_NAME/catalog/argusinsight, and click **Apply**.

Figure 9–6 The Application Defined MBeans — BIDomain — Attributes Screen

| Name | Description | Access | Value |
|-----------------------------|---|--------|--|
| 1 AsyncLogonTimeoutSecs | The number of seconds before a logon timeout is invoked in Asynchronous mode. Default is 30. | RW | 30 |
| 2 ConfigMBean | If true, it indicates that the MBean is a Config MBean. | R | false |
| 3 DeploymentMode | The DeploymentMode attribute is used to alter the system's behaviour when used in an 'On Demand' deployment | RW | onstate |
| 4 evenProvider | If true, it indicates that the MBean is an event provider as defined by JSR-77. | R | true |
| 5 eventTypes | All the event's types emitted by this MBean. | R | jmx.attribute.change |
| 6 idName | The MBean's unique 300 name | R | oracle.biee.admin:type=BIDomain.BIInstance.PresentationServerConfiguration |
| 7 ReadOnly | If true, it indicates that the MBean is a read only MBean. | R | false |
| 8 RestartNeeded | Indicates whether a restart is needed. | R | false |
| 9 stateManageable | If true, it indicates that this MBean provides State Management capabilities as defined by JSR-77. | R | false |
| 10 statisticProvider | If true, it indicates that the MBean is a statistic provider as defined by JSR-77. | R | false |
| 11 SyncLogonTimeoutSecs | The number of seconds before a logon timeout is invoked in Synchronous mode. Default is 900. | RW | 900 |
| 12 SystemMBean | If true, it indicates that the MBean is a System MBean. | R | false |
| 13 WebCatalogShared | Whether a shared directory is used to find webcat files when OBPS is clustered (deprecated) | RW | true |
| 14 WebCatalogSharedLocation | Web catalog location to be used by OBPS | RW | resentationServicesComponent/SCOMPONENT_NAME/catalog/argusnight |

8. Navigate back to the MBean Application Defined MBeans > oracle.biee.admin > Domain: bifoundation_domain > BIDomain > BIDomain.

In the Operations tab, invoke the commit operation pass the parameter as ERROR.

Figure 9–7 The Application Defined MBeans — BIDomain — Operations Screen

| Name | Description | Parameters | Return Type |
|--------------------------------|--|--|-------------|
| 1 commit | Same as commit("ERROR"); raises an exception if any errors occur | 0 javax.management.openmbean.CompositeData | |
| 2 commit | Saves any changes made to the domain and releases the lock. Exceptions are thrown according to the exceptionThreshold. See the returned EventLog for errors or warnings at individual servers. | 1 javax.management.openmbean.CompositeData | |
| 3 discoverProcessConfiguration | Discards the current process configuration stored in the central BI config file and reconstructs it from OPMV's state | 0 int | |
| 4 lock | Obtains an exclusive lock for managing the domain | 0 void | |
| 5 refresh | Refreshes the domain mbean from the state persisted in the underlying config file | 0 void | |
| 6 rollback | Rolls back any changes made to the domain since the lock was obtained and releases the lock | 0 void | |
| 7 simpleCommit | Same as commit("WARNING"). Any warnings or errors are communicated by an exception, which is easier for simple clients to handle. | 0 void | |

9. Navigate through the tree control (Business Intelligence > coreapplication), and select a repository from the right side pane.

Go to Deployment tab, select Repository tab, and click **Lock and Edit**.

A confirmation message appears, click **Close**.

10. Perform the following:

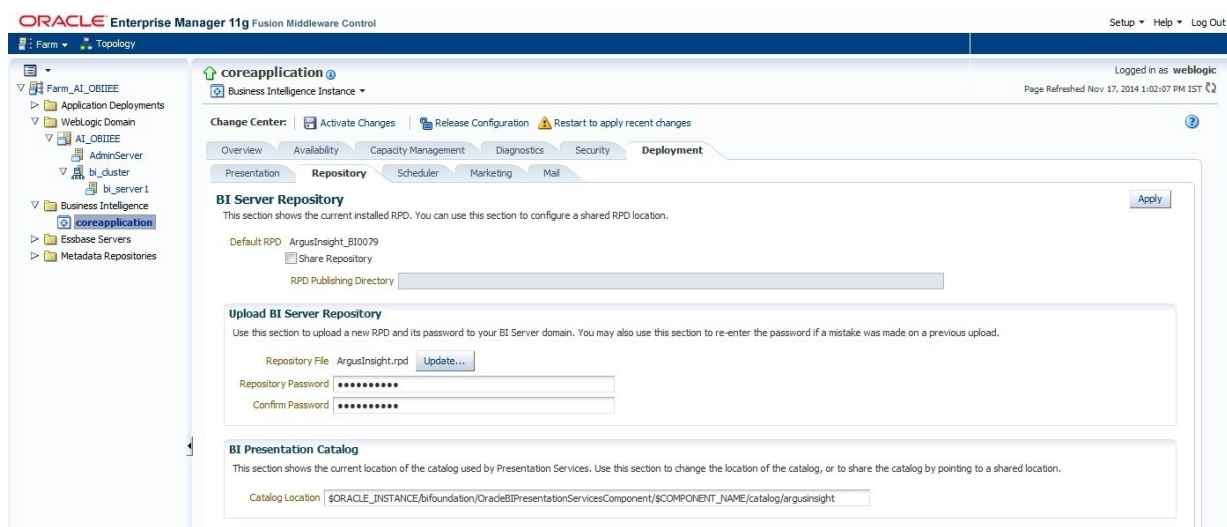
- Repository file: Upload the Repository file ArgusInsight.rpd from the path where you have copied the rpd.

For example: <AI Home>\report\ArgusInsight.rpd of AI)

- Repository Password: **insight123** (or it must be the changed password in case it has been modified, as mentioned in the note before the procedure.)

Note: If the OBIEE Server is not the same machine as the install machine, then copy the catalog file from <AI Home>\report\catalog\argusinsight.zip into the machine where OBIEE server is installed.

Figure 9–8 Business Intelligence — coreapplication



11. Confirm the catalog location as \$ORACLE_INSTANCE/bifoundation/OracleBIPresentationServicesComponent/\$COMPONENT_NAME/catalog/argusinsight.
12. Copy the Catalog from the Oracle Argus Insight installed directory to the location mentioned above.

For example:

Installed location: d:\ArgusInsight\OBIEE\Catalog\argusinsight.zip to the location in WLS: MIDDLEWARE_HOME>\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\catalog, and extract the zip file to the same location.

13. Click **Apply** and then **Activate Changes**.
14. Restart the OBIEE Services.

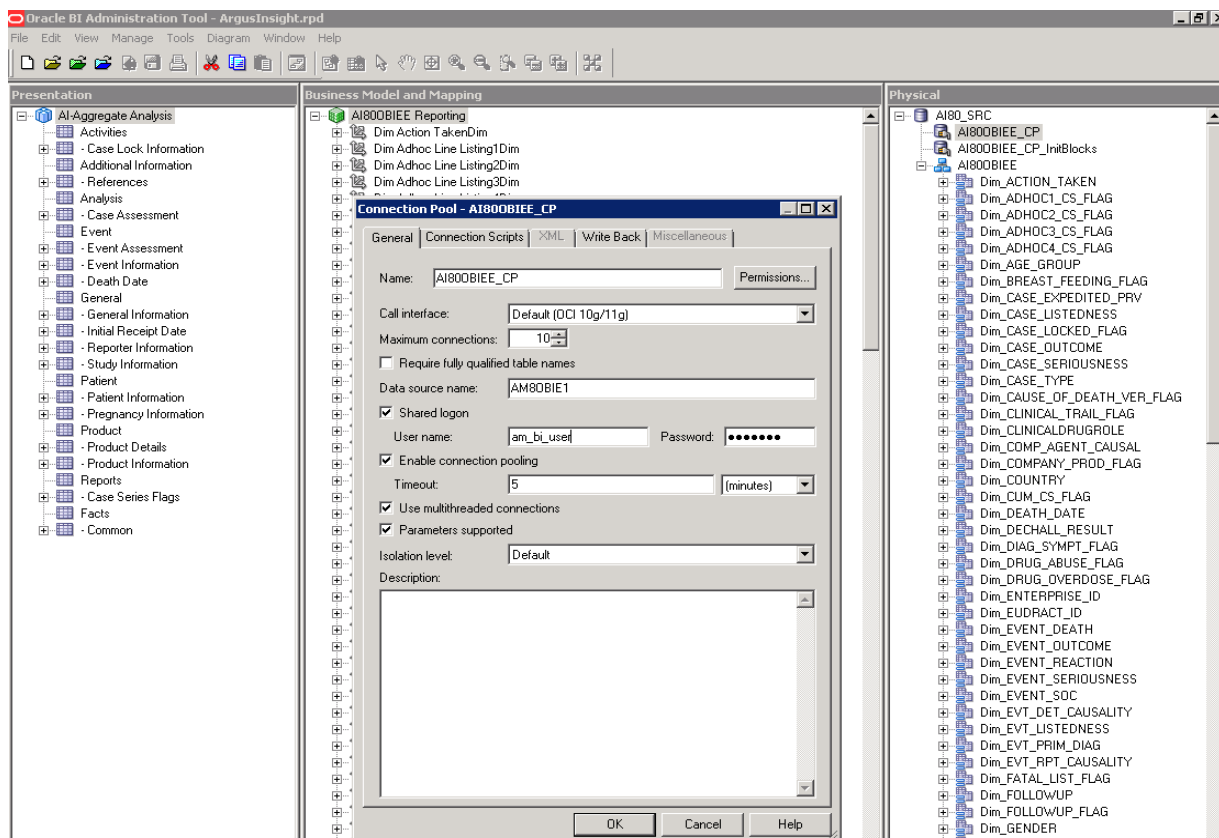
9.2.3 Post-deployment of Oracle Argus Insight RPD

Open the Oracle Argus Insight RPD in the Administration Tool in online mode and specify the details, as mentioned below:

- Repository Password: insight123
- User: weblogic or BISystemUser

- Password: Password for the user mentioned above

Figure 9–9 The Oracle Argus Insight RPD Screen



9.2.3.1 Changing the Connection Pool Settings

When the Oracle Argus Insight RPD is opened in online mode, change the Connection Pool settings, as follows:

1. Change the AI80_SRC > AI80OBIEE_CP and AI80OBIEE_CP_InitBlocks to point to the read only user created at the time of Argus Mart schema creation.
2. Data Source Name: TNS name entry for Argus Mart DB Instance.
3. User Name: <AM_BI_USER> [the schema name specified for the Argus Mart Schema during installation, the read only user created].
4. Password: The password specified for the < AM80OBI > schema.
5. Save the RPD.

Connection Pool: AI80OBIEE_CP

The connection pool should be created based on the target database, which contains all the Argus Insight dimensions, fact tables and views.

Figure 9–10 Connection Details

Connection Pool - AI800BIEE_CP

General | Connection Scripts | XML | Write Back | Miscellaneous

Name: AI800BIEE_CP Permissions...

Call interface: Default (OCI 10g/11g)

Maximum connections: 10

☐ Require fully qualified table names

Data source name: AM80BIE1

☒ Shared logon

User name: am_bi_user Password:

☒ Enable connection pooling

Timeout: 5 (minutes)

☒ Use multithreaded connections

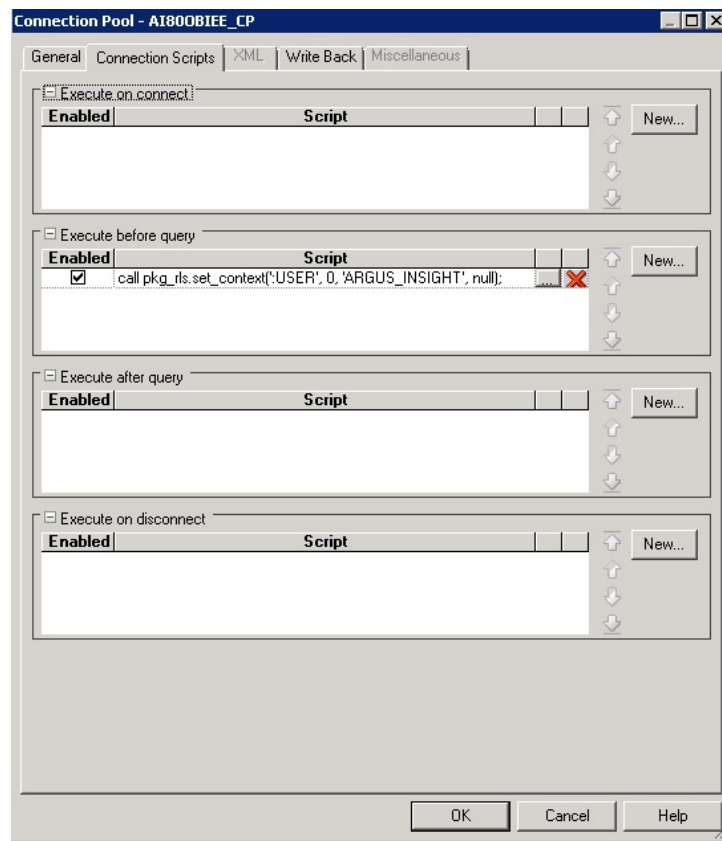
☒ Parameters supported

Isolation level: Default

Description:

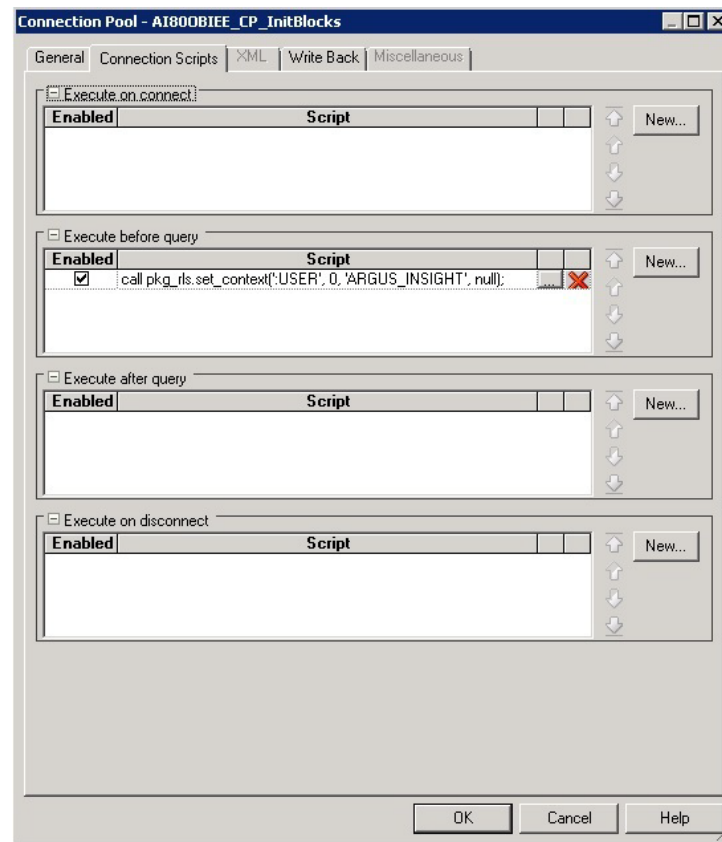
OK Cancel Help

Set the Connection Script as "call pkg_rls.set_context(':USER', 0, 'ARGUS_INSIGHT', null);" at "Execute Before Query".

Figure 9–11 Connection Pool: AI80OBIEE_CP**Connection Pool: AI80OBIEE_CP_InitBlocks**

This connection pool should be created for Initialization blocks to run the select statements inside the Initialization strings.

Set the Connection Script as "call pkg_rls.set_context(':USER', 0, 'ARGUS_INSIGHT', null);" at "Execute Before Query".

Figure 9–12 Connection Pool — AI80OBIEE_CP_InitBlocks

9.2.3.2 Changing the OBIEE RPD Password

To change the default password for OBIEE RPD, execute the following steps:

1. Open the BI Administrator Tool and open <ARGUS_INSIGHT_HOME>\report\ArgusInsight.rpd in **Offline** mode.
2. Select **File > Change Password**.
3. Enter the old password as **insight123** (default password).
4. Enter the new password and confirm by entering it again.

You must remember this password, instead of the default password, and use the same later in the installation process.

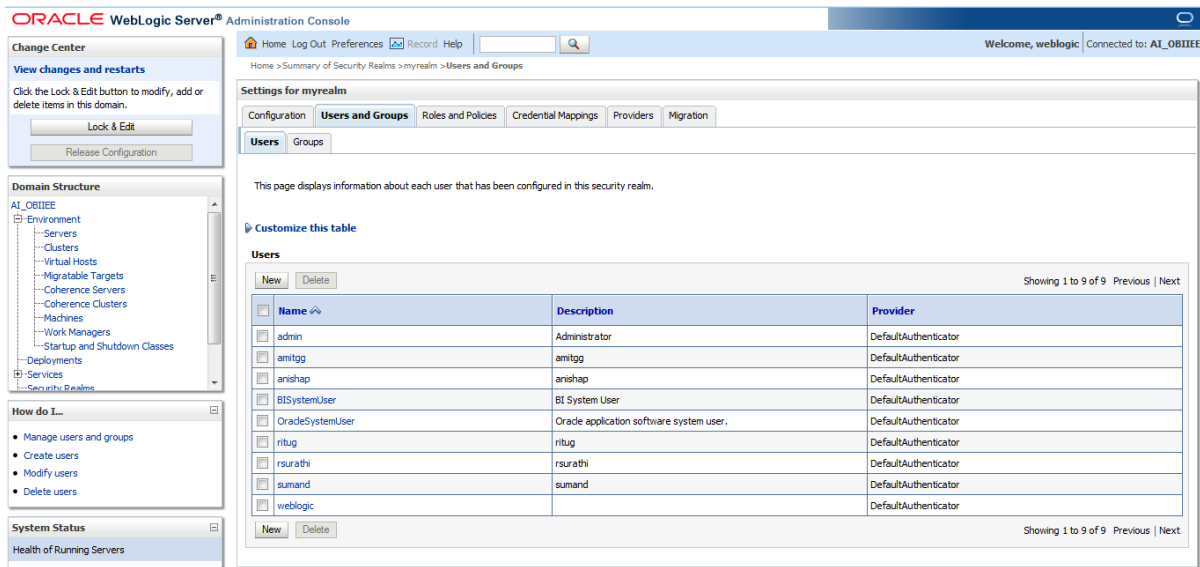
9.3 Creating Users and Groups in OBIEE

This section provides the steps to create users and groups in OBIEE, and also comprises the following sub-sections:

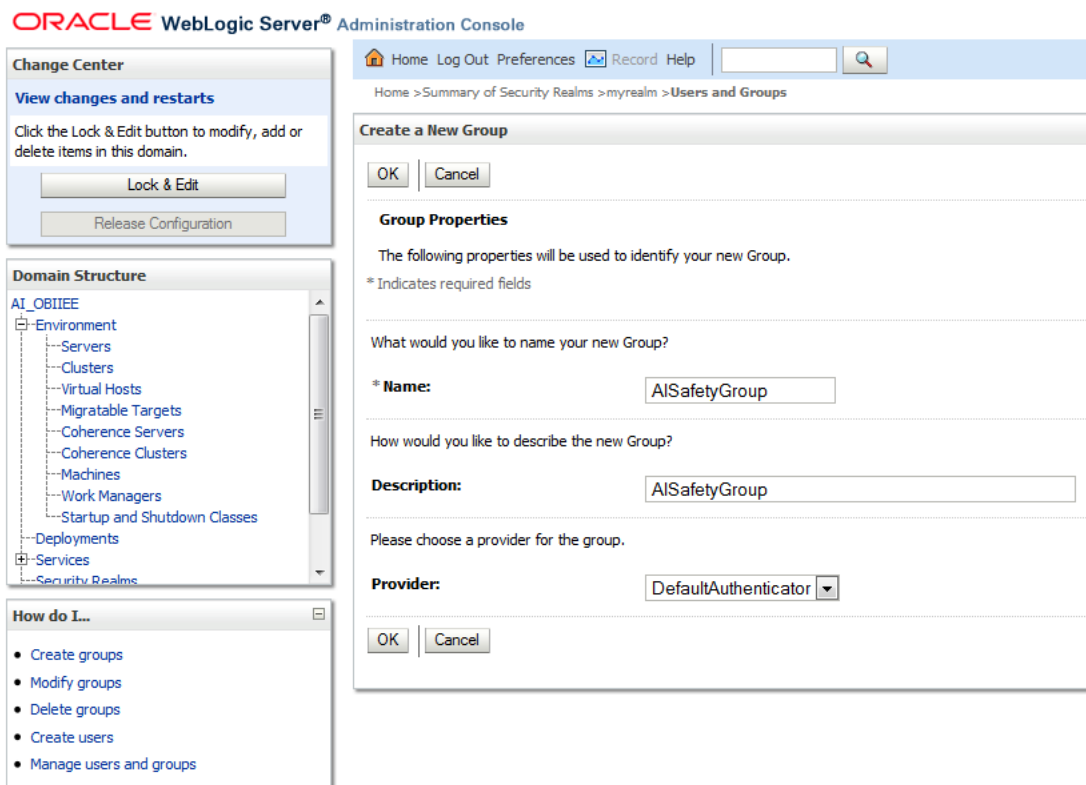
- [Assigning OBIEE Application Roles for the OBIEE groups created](#)
- [Creating Users in WebLogic Server](#)

To create users and groups in OBIEE:

1. Open a new browser window for the WebLogic Administration Console.
2. Navigate to Security Realms > myrealm > Users and Groups tab.

Figure 9–13 myrealm Settings — Users and Groups Tab

3. Select the Groups tab, and click **New**.
4. Enter the group name as **AIAdmin**, and click **OK**.

Figure 9–14 myrealm Settings: Groups Tab — New Group

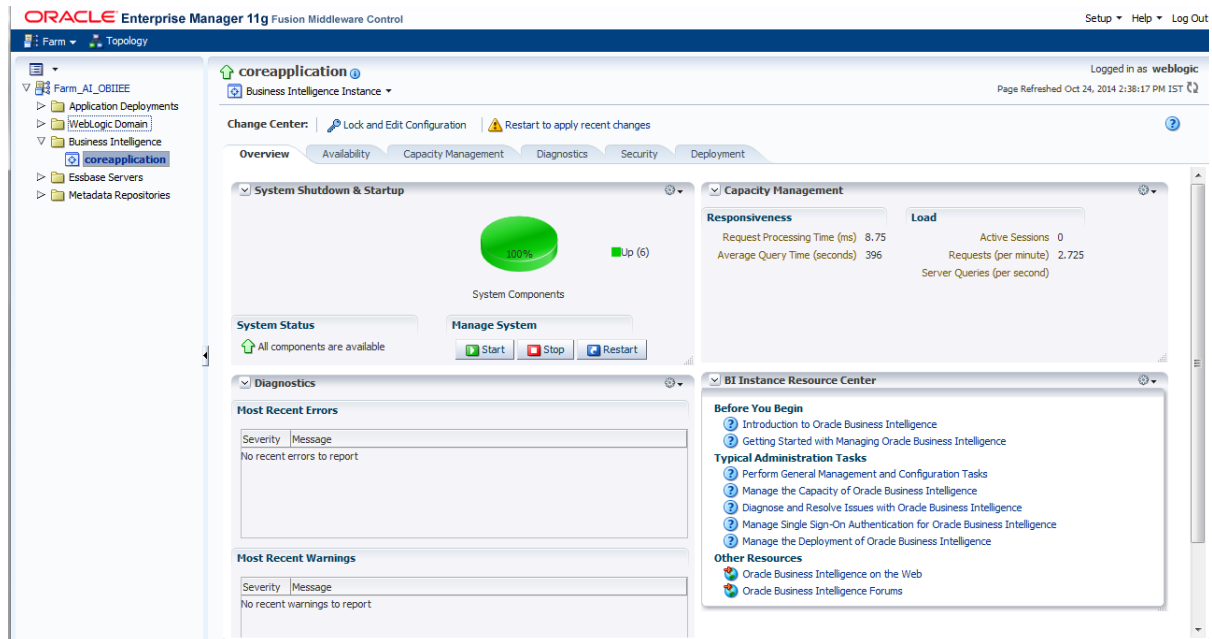
5. Follow the above process to create the groups **AISafetyGroup** and **AIConsumersGroup**.

9.3.1 Assigning OBIEE Application Roles for the OBIEE groups created

The following are the steps to assign OBIEE application roles to the OBIEE groups:

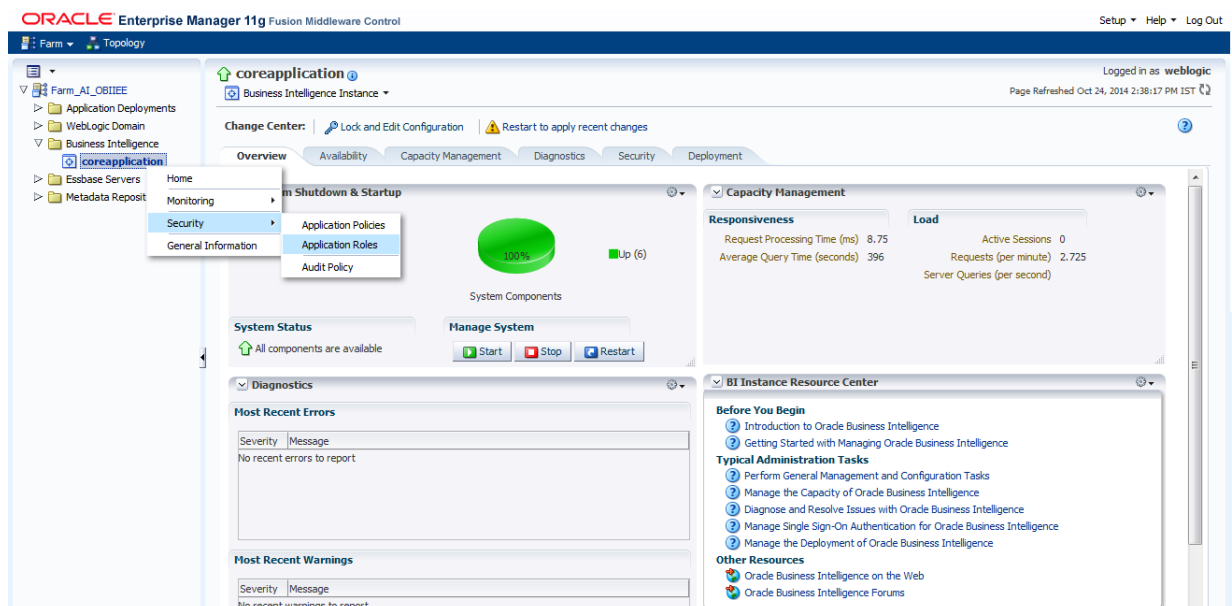
1. Start a new browser window for the Enterprise Manager for Fusion Middleware Control, and navigate to the Business Intelligence > coreapplication Overview page.

Figure 9–15 coreapplication Screen



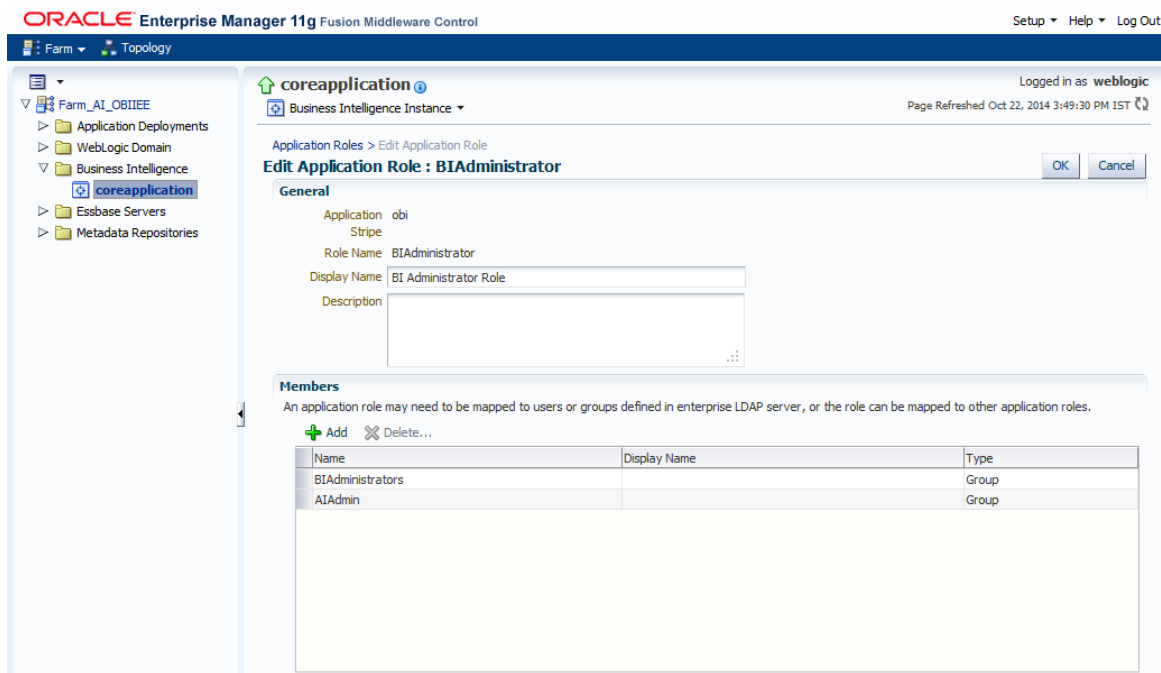
2. Invoke the Application Roles by choosing from the menu drop down at Business Intelligence Instance > Security > Application Roles.

Figure 9–16 coreapplication — Application Roles Screen



- Click on **BIAdministrator** application role, and add the group **AIAdmin**.

Figure 9–17 coreapplication — Add Group



- Click **OK**.
- Repeat the above steps to add the groups created as per the table given here:

Table 9–1 OBIEE Application Roles and Groups

| Application Role | Groups to be Added |
|------------------|--|
| BIAdministrator | AIAdmin |
| BIAuthor | AIAdmin, AISafetyGroup |
| BIConsumer | AIAdmin, AISafetyGroup, AIConsumersGroup |

Refer to [Section 9.4, "OBIEE Default Application Roles"](#) for a list of privileges present as per the BIApplication Role specified above.

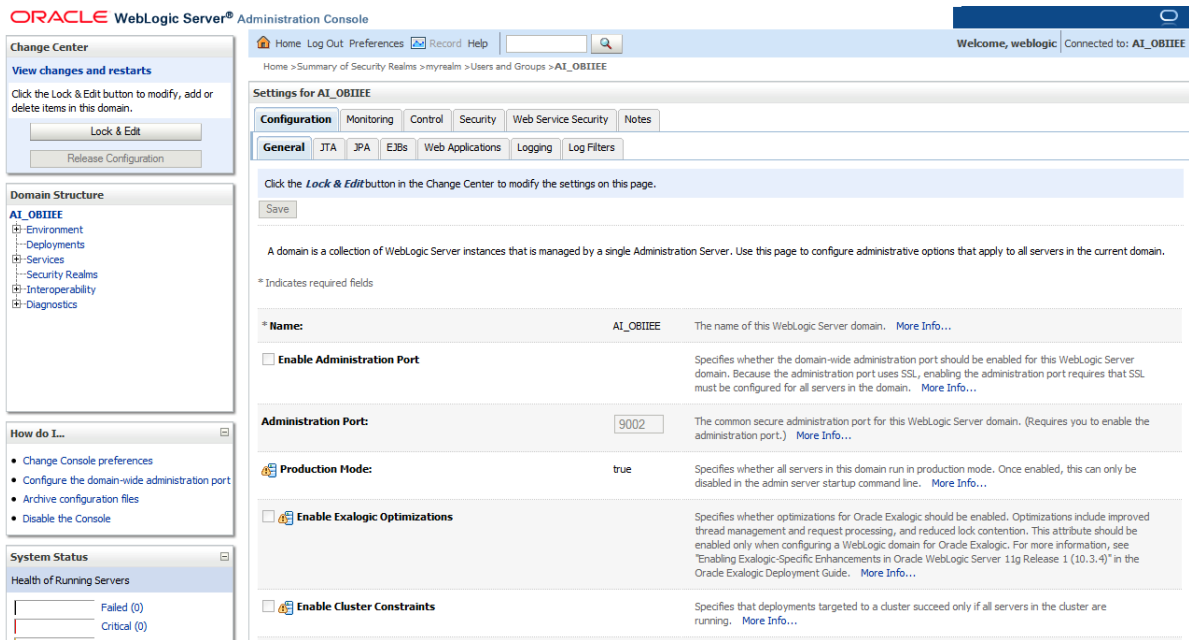
9.3.2 Creating Users in WebLogic Server

The following are the steps to create users in WebLogic server:

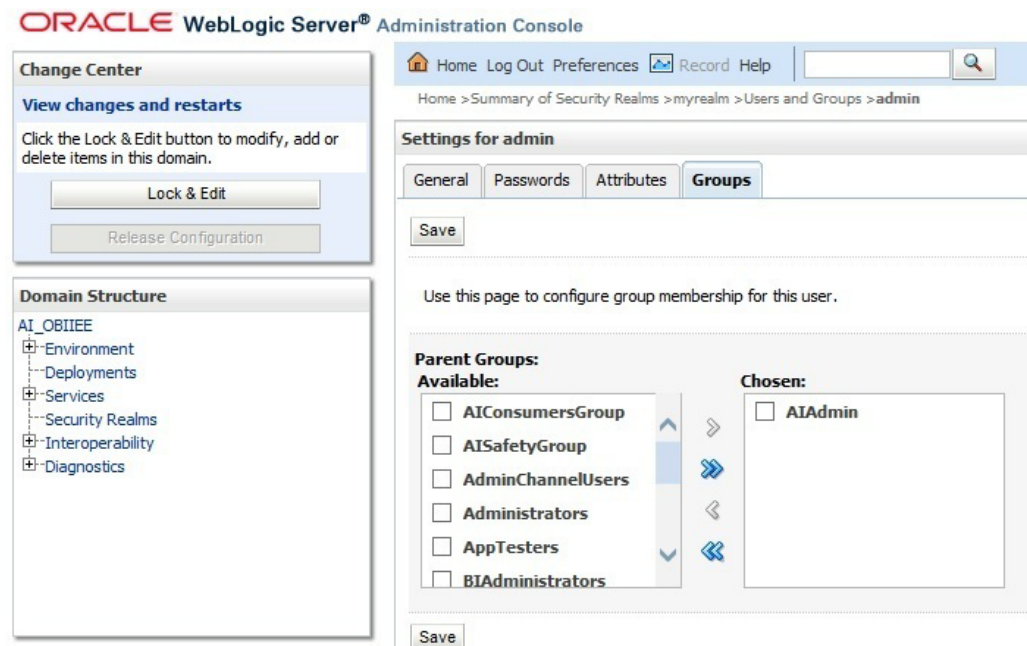
- Start a new browser window for the WebLogic Administration Console.
- Navigate to Security Realms > myrealm > Users and Groups tab.
- Select the Users tab, and click **New**.
- Enter the User Name and Password details.
- Click **OK** to save the user in the embedded LDAP.

You return to Users tab.

- Click on the newly created User.

Figure 9–18 Administration Console — General Tab

- Click the Groups tab, and select the Group for the user to be added to and save the details.

Figure 9–19 Adding User to a Group

- Repeat the above steps to add users to the other groups (see Table 9–1).

9.4 OBIEE Default Application Roles

| Component | Privilege | Description | Default Role Granted |
|----------------|--|---|----------------------|
| Access | Access to Dashboards | Allows users to view dashboards. | BIConsumer |
| Access | Access to Answers | Allows users to access the basic features of the Analysis editor. | BIAuthor |
| Access | Access to Delivers | Allows users to create and edit agents. | BIAuthor |
| Access | Access to Briefing Books | Allows users to view and download briefing books. | BIConsumer |
| Access | Access to Administration | Allows users to access the Administration pages in Presentation Services, | BIAdministrator |
| Access | Access to Segments | Allows users to access segments in Oracle's Siebel Marketing. | BIConsumer |
| Access | Access to Segment Trees | Allows users to access segment trees in Oracle's Siebel Marketing. | BIAuthor |
| Access | Access to List Formats | Allows users to access list formats in Oracle's Siebel Marketing. | BIAuthor |
| Access | Access to Metadata Dictionary | Allows users to access the metadata dictionary information for subject areas, folders, columns, and levels. | BIAdministrator |
| Access | Access to Oracle BI for Microsoft Office | See Section C.2.3.3.2, "Access to Oracle BI for Microsoft Office Privilege." | BIConsumer |
| Access | Access to Conditions | Allows users to create conditions. | BIAuthor |
| Access | Access to KPI Builder | Allows users to create KPIs. | BIAuthor |
| Access | Access to Scorecard | Allows users access to Oracle BI Scorecard. | BIConsumer |
| Actions | Create Navigate Actions | See Section C.2.3.3.1, "Access to Oracle BI Enterprise Edition Actions." | BIAuthor |
| Actions | Create Invoke Actions | See Section C.2.3.3.1, "Access to Oracle BI Enterprise Edition Actions." | BIAuthor |
| Actions | Save Actions Containing Embedded HTML | See Section C.2.3.3.1, "Access to Oracle BI Enterprise Edition Actions." | BIAdministrator |
| Admin: Catalog | Change Permissions | Allows users to modify permissions for catalog objects. | BIAuthor |
| Admin: Catalog | Toggle Maintenance Mode | Shows the Toggle Maintenance Mode link on the Presentation Services Administration page, which allows users to turn maintenance mode on and off. In maintenance mode, the catalog is read-only; no one can write to it. | BIAdministrator |

| Component | Privilege | Description | Default Role Granted |
|----------------|--------------------------|---|----------------------|
| Admin: General | Manage Sessions | Shows the Manage Sessions link on the Presentation Services Administration page, which displays the Manage Sessions page in which users manage sessions. | BIAdministrator |
| Admin: General | Manage Dashboards | Allows users to create and edit dashboards, including editing their properties. | BIAdministrator |
| Admin: General | See Session IDs | Allows users to see session IDs on the Manage Sessions page. | BIAdministrator |
| Admin: General | Issue SQL Directly | Shows the Issue SQL link on the Presentation Services Administration page, which displays the Issue SQL page in which users enter SQL statements. | BIAdministrator |
| Admin: General | View System Information | Allows users to view information about the system at the top of the Administration page in Presentation Services. | BIAdministrator |
| Admin: General | Performance Monitor | Allows users to monitor performance. | BIAdministrator |
| Admin: General | Manage Agent Sessions | Shows the Manage Agent Sessions link on the Presentation Services Administration page, which displays the Manage Agent Sessions page in which users manage agent sessions. | BIAdministrator |
| Admin: General | Manage Device Types | Shows the Manage Device Types link on the Presentation Services Administration page, which displays the Manage Device Types page in which users manage device types for agents. | BIAdministrator |
| Admin: General | Manage Map Data | Shows the Manage Map Data link on the Presentation Services Administration page, which displays the Manage Map Data page in which users edit layers, background maps, and images for map views. | BIAdministrator |
| Admin: General | See Privileged Errors | Allows users to see privileged error messages. Users can see detailed error messages about database connections or other details when lower level components fail. | BIAdministrator |
| Admin: General | See SQL Issued in Errors | Allows users to see SQL statements that are returned by the BI Server in error messages. | BIConsumer |

| Component | Privilege | Description | Default Role Granted |
|-----------------|-----------------------------------|--|----------------------|
| Admin: General | Manage Marketing Jobs | Shows the Manage Marketing Jobs link on the Presentation Services Administration page, which displays the Marketing Job Management page in which users manage marketing jobs. | BIAuthor |
| Admin: General | Manage Marketing Defaults | Shows the Manage Marketing Defaults link on the Presentation Services Administration page, which displays the Manage Marketing Defaults page in which users manage defaults for Oracle's Siebel Marketing application. | BIAdministrator |
| Admin: Security | Manage Catalog Groups | Shows the Manage Catalog Groups link on the Presentation Services Administration page, which displays the Manage Catalog Groups page in which users edit Catalog groups. | BIAdministrator |
| Admin: Security | Manage Privileges | Shows the Manage Privileges link on the Presentation Services Administration page, which displays the Manage Privileges page in which users manage the privileges that are described in this table. | BIAdministrator |
| Admin: Security | Set Ownership of Catalog Objects | Allows users to edit the ownership of objects in the catalog on the Catalog page. | BIAdministrator |
| Admin: Security | User Population - Can List Users | Allows users to see the list of users for which they can perform tasks such as assigning privileges and permissions. | BIConsumer, BISystem |
| Admin: Security | User Population - Can List Groups | Allows users to see the list of groups for which they can perform tasks such as assigning privileges and permissions. | BIConsumer, BISystem |
| Briefing Book | Add To or Edit a Briefing Book | Allows users to see the Add to Briefing Book link on dashboard pages and analyses and the Edit link in briefing books. | BIAuthor |
| Briefing Book | Download Briefing Book | Allows users to download briefing books. | BIConsumer |
| Catalog | Personal Storage | Allows users to have write access to their own My Folders folders and can create content there. If users do not have this privilege, then they can receive email alerts but cannot receive dashboard alerts. | BIConsumer |
| Catalog | Reload Metadata | Allows users to click the Reload Server Metadata link from the Refresh menu in the toolbar of the Subject Areas pane. | BIAdministrator |

| Component | Privilege | Description | Default Role Granted |
|------------|--------------------------------|--|----------------------|
| Catalog | See Hidden Items | Allows users to see hidden items in catalog folders. Users can also select the Show Hidden Items box on the Catalog page. | BIAuthor |
| Catalog | Create Folders | Allows users to create folders in the catalog. | BIAuthor |
| Catalog | Archive Catalog | Allows users to archive the folders and objects in the catalog. | BIAdministrator |
| Catalog | Unarchive Catalog | Allows users to unarchive catalog objects that have been archived previously. | BIAdministrator |
| Catalog | Upload Files | Allows users to upload files into an existing catalog. | BIAdministrator |
| Conditions | Create Conditions | Allows users to create or edit named conditions. | BIAuthor |
| Dashboards | Save Customizations | See Section 19.5, "Controlling Access to Saved Customization Options in Dashboards." | BIConsumer |
| Dashboards | Assign Default Customizations | See Section 19.5, "Controlling Access to Saved Customization Options in Dashboards." | BIAuthor |
| Formatting | Save SystemWide Column Formats | Allows users to save systemwide defaults when specifying formats for columns. | BIAdministrator |
| My Account | Access to My Account | Allows users to access the My Account dialog. | BIConsumer |
| My Account | Change Preferences | Allows users to access the Preferences tab of the My Account dialog. | BIConsumer |
| My Account | Change Delivery Options | Allows users to access the Delivery Options tab of the My Account dialog. | BIConsumer |
| Answers | Create Views | Allows users to create views. | BIAuthor |
| Answers | Create Prompts | Allows users to create prompts. | BIAuthor |
| Answers | Access Advanced Tab | Allows users to access the Advanced tab in the Analysis editor. | BIAuthor |
| Answers | Edit Column Formulas | Allows users to edit column formulas. | BIAuthor |
| Answers | Save Content with HTML Markup | Allows users to save objects such as views and actions that contain HTML code. | BIAdministrator |
| Answers | Enter XML and Logical SQL | Allows users to use the Advanced SQL tab. | BIAuthor |
| Answers | Edit Direct Database Analysis | Allows users to create and edit requests that are sent directly to the back-end data source. | BIAdministrator |

| Component | Privilege | Description | Default Role Granted |
|-----------|--|---|----------------------|
| Answers | Create Analysis from Simple SQL | Allows users to select the Create Analysis from Simple SQL option in the Select Subject Area list. | BIAdministrator |
| Answers | Create Advanced Filters and Set Operations | Allows users to click the Combine results based on union, intersection, and difference operations button from the Criteria tab in the Analysis editor. | BIAuthor |
| Answers | Save Filters | Allows users to save filters | BIAuthor |
| Answers | Execute Direct Database Analysis | Allows users to issue requests directly to the back-end data source. | BIAdministrator |
| Delivers | Create Agents | Allows users to create agents. | BIAuthor |
| Delivers | Publish Agents for Subscription | Allows users to publish agents for subscription. | BIAuthor |
| Delivers | Deliver Agents to Specific or Dynamically Determined Users | Allows users to deliver agents to other users. | BIAdministrator |
| Delivers | Chain Agents | Allows users to chain agents. | BIAuthor |
| Delivers | Modify Current Subscriptions for Agents | Allows users to modify the current subscriptions for agents, including unsubscribing users. | BIAdministrator |
| Proxy | Act As Proxy | Allows users to act as proxy users for other users, as described in Section C.5, "Enabling Users to Act for Others." | Denied: BIConsumer |
| RSS Feeds | Access to RSS Feeds | Allows users to subscribe to and receive RSS feeds with alerts and contents of folders. If Presentation Services uses the HTTPS protocol, then the RSS Reader that you use must also support the HTTPS protocol. | BIAuthor |
| Scorecard | Create/Edit Scorecards | Allows users to create and edit scorecards. | BIAuthor |
| Scorecard | View Scorecards | Allows users to view scorecards. | BIConsumer |
| Scorecard | Create/Edit Objectives | Allows users to create and edit objectives. | BIAuthor |
| Scorecard | Create/Edit Initiatives | Allows users to create and edit initiatives. | BIAuthor |
| Scorecard | Create Views | Allows users to create and edit scorecard views, such as strategy trees. | BIAuthor |
| Scorecard | Create/Edit Causes and Effects Linkages | Allows users to create and edit cause and effect relationships. | BIAuthor |
| Scorecard | Create/Edit Perspectives | Allows users to create and edit perspectives. | BIAdministrator |

| Component | Privilege | Description | Default Role Granted |
|--------------|--|--|----------------------|
| Scorecard | Add Annotations | Allows users to add comments to KPIs and scorecard components. | BICustomer |
| Scorecard | Override Status | Allows users to override statuses of KPIs and scorecard components. | BICustomer |
| Scorecard | Create/Edit KPIs | Allows users to create and edit KPIs. | BIAuthor |
| Scorecard | Add Scorecard Views to Dashboards | Allows users to add scorecard views (such as strategy trees) to dashboards. | BICustomer |
| List Formats | Create List Formats | Allows users to create list formats in Oracle's Siebel Marketing. | BIAuthor |
| List Formats | Create Headers and Footers | Allows users to create headers and footers for list formats in Oracle's Siebel Marketing. | BIAuthor |
| List Formats | Access Options Tab | Allows users to access the Options tab for list formats in Oracle's Siebel Marketing. | BIAuthor |
| List Formats | Add/Remove List Format Columns | Allows users to add and remove columns for list formats in Oracle's Siebel Marketing. | BIAuthor |
| Segmentation | Create Segments | Allows users to create segments in Oracle's Siebel Marketing. | BIAuthor |
| Segmentation | Create Segment Trees | Allows users to create segment trees in Oracle's Siebel Marketing. | BIAuthor |
| Segmentation | Create/Purge Saved Result Sets | Allows users to create and purge saved result sets in Oracle's Siebel Marketing. | BIAuthor |
| Segmentation | Access Segment Advanced Options Tab | Allows users to access the Segment Advanced Options tab in Oracle's Siebel Marketing. | BIAuthor |
| Segmentation | Access Segment Tree Advanced Options Tab | Allows users to access the Segment Tree Advanced Options tab in Oracle's Siebel Marketing. | BIAuthor |
| Segmentation | Change Target Levels within Segment Designer | Allows users to change target levels within the Segment Designer in Oracle's Siebel Marketing. | BIAuthor |
| SOAP | Access SOAP | Allows users to access various web services. | BICustomer, BISystem |
| SOAP | Impersonate as System User | Allows users to impersonate a system user using a web service. | BISystem |
| SOAP | Access MetadataService | Allows users to access the MetadataService web service. | BICustomer, BISystem |
| SOAP | Access AnalysisExportViews Service | Allows users to access the ReportingEditingService web service. | BICustomer |

| Component | Privilege | Description | Default Role Granted |
|-------------------------------------|-----------------------------------|--|-----------------------|
| SOAP | Access ReportingEditingService | Allows users to access the ReportingEditingService web service. | BICConsumer, BISystem |
| SOAP | Access ConditionEvaluationService | Allows users to access the ConditionEvaluationService web service. | BICConsumer, BISystem |
| SOAP | Access ReplicationService | Allows users to access the ReplicationService web service to replicate the Oracle BI Presentation Catalog. | BISystem |
| SOAP | Access CatalogIndexingService | Allows users to access the CatalogIndexingService web service to index the Oracle BI Presentation Catalog for use with full-text search. | BISystem |
| SOAP | Access DashboardService | Allows users to access the DashboardService web service. | BICConsumer, BISystem |
| SOAP | Access SecurityService | Allows users to access the SecurityService web service. | BICConsumer, BISystem |
| SOAP | Access ScorecardMetadataService | Allows users to access the ScorecardMetadataService web service. | BICConsumer, BISystem |
| SOAP | Access ScorecardAssessmentService | Allows users to access the ScorecardAssessmentService web service. | BICConsumer, BISystem |
| SOAP | Access HtmlViewService | Allows users to access the HtmlViewService web service. | BICConsumer, BISystem |
| SOAP | Access CatalogService | Allows users to access the CatalogService web service. | BICConsumer, BISystem |
| SOAP | Access IBotService | Allows users to access the IBotService web service. | BICConsumer, BISystem |
| SOAP | Access XmlGenerationService | Allows users to access the XmlGenerationService web service. | BICConsumer, BISystem |
| SOAP | Access JobManagementService | Allows users to access the JobManagementService web service. | BICConsumer, BISystem |
| SOAP | Access KPIAssessmentService | Allows users to access the KPIAssessmentService web service. | BICConsumer, BISystem |
| Subject Area (<i>by its name</i>) | Access within Oracle BI Answers | Allows users to access the specified subject area within the Answers editor. | BIAuthor |
| View Analyzer | Add/Edit AnalyzerView | Allows users to access the Analyzer view. | BIAAdministrator |
| View Column Selector | Add/Edit Column SelectorView | Allows users to create and edit column selector views. | BIAuthor |
| View Compound | Add/Edit CompoundView | Allows users to create and edit compound layouts. | BIAuthor |

| Component | Privilege | Description | Default Role Granted |
|-------------------------|---------------------------------|--|----------------------|
| View Graph | Add/Edit GraphView | Allows users to create and edit graph views. | BIAdministrator |
| View Funnel | Add/Edit FunnelView | Allows users to create and edit funnel graph views. | BIAuthor |
| View Gauge | Add/Edit GaugeView | Allows users to create and edit gauge views. | BIAuthor |
| View Filters | Add/Edit FiltersView | Allows users to create and edit filters. | BIAuthor |
| View Dashboard Prompt | Add/Edit Dashboard PromptView | Allows users to create and edit dashboard prompts. | BIAuthor |
| View Static Text | Add/Edit Static TextView | Allows users to create and edit static text views. | BIAuthor |
| View Legend | Add/Edit Legend View | Allows users to create and edit legend views. | BIAuthor |
| View Map | Add/Edit MapView | Allows users to create and edit map views. | BIAuthor |
| View Narrative | Add/Edit NarrativeView | Allows users to create and edit narrative views. | BIAuthor |
| View Nested Request | Add/Edit Nested RequestView | Allows users to create and edit nested analyses. | BIAuthor |
| View No Results | Add/Edit No ResultsView | Allows users to create and edit no result views. | BIAuthor |
| View Pivot Table | Add/Edit Pivot TableView | Allows users to create and edit pivot table views. | BIAuthor |
| View Report Prompt | Add/Edit Report PromptView | Allows users to create and edit prompts. | BIAuthor |
| View Create Segment | Add/Edit Create SegmentView | Allows users to create and edit segment views. | BIAuthor |
| View Logical SQL | Add/Edit Logical SQLView | Allows users to create and edit logical SQL views. | BIAuthor |
| View Table | Add/Edit TableView | Allows users to create and edit table views. | BIAuthor |
| View Create Target List | Add/Edit Create Target ListView | Allows users to create and edit target list views. | BIAuthor |
| View Ticker | Add/Edit TickerView | Allows users to create and edit ticker views. | BIAuthor |
| View Title | Add/Edit TitleView | Allows users to create and edit title views. | BIAuthor |
| View View Selector | Add/Edit View SelectorView | Allows users to create and edit view selector views. | BIAuthor |
| Write Back | Write Back to Database | Grants the right to write data into the data source. | Denied: BIConsumer |
| Write Back | Manage Write Back | Grants the right to manage write back requests. | BIAdministrator |

Managing the Argus Insight Cryptography Key

This chapter describes how to update the cryptography key in Argus Insight *after* the key has been updated in Argus Safety.

10.1 Updating the Cryptography Key

After the cryptography key has been updated in Argus Safety, you must update the cryptography key in Argus Insight. This process will update all the required passwords in Argus Insight using the new key.

To update the cryptography key and regenerate passwords:

1. Log in to the Argus Insight client.
2. Click **Start**.
3. Navigate to **Programs > Oracle > Argus Insight**, and then select **Cryptography Key Management**.

The Argus Insight Key Management - Login dialog box appears.

4. Enter the following to log in to the Key Management tool:
 - a. APR_USER password.
 - b. Argus Insight database name.
 - c. Click **OK**.

After successful authentication, the Argus Insight Key Management - Regenerate passwords dialog box appears.

5. Enter the new key from the Argus Safety Server.

You may copy **UserCryptoKey** from the ArgusSecureKey.ini file, which is present on all Argus Safety Servers in C:\Windows folder. Make sure you use the exact key used by the corresponding Argus Safety Server.

6. Click **Regenerate passwords** to start the password regeneration process.

When the password regeneration process completes, the following information appears:

- Status of the regeneration process (success or fail)
- Lists of the passwords that changed

10.1.1 Copying Initialization Files to Other Servers

After you change the cryptography key using the Key Management tool, you must manually copy the **AI.ini** and **Argus SecureKey.ini** initialization files from the C:\Windows folder of the Argus Insight Web Server to the following folders:

- C:\Windows of all Cognos Servers
- C:\Windows of all Argus Insight Web Servers

You must copy the AI.ini and Argus SecureKey.ini files to keep the cryptography key and the APR_USER password in sync on all the servers. In case these files are not copied, the Cognos Server or any other Argus Insight Web Server will not function.

10.1.2 Restarting IIS and Running ETL

After you change the cryptography key, you must complete the following steps on the Argus Insight Web Server to reflect the changes:

1. Restart the Internet Information Services (IIS).
2. Run the incremental ETL.

Uninstalling the Argus Insight Application

This chapter describes how to uninstall the Argus Insight application.

11.1 Uninstalling Argus Insight from the Web Server

To uninstall the Argus Insight application from the Web Server:

1. Log in to the Argus Insight Web Server as a user with administrator privileges.
2. Navigate to **Control Panel, Programs**, and then select **Program and Features**.
3. Select **Uninstall or change a program**.
4. Right-click on Argus Insight, and click **Uninstall**.

The Argus Insight wizard is initiated and the Welcome screen appears with options to modify, verify, and remove programs.

5. Select **Remove**, and click **Next**.

A dialog box appears to confirm that you want to completely remove the selected application and all of its features.

6. Click **Yes** to continue.

The Argus Insight application is uninstalled completely and a message appears when the process is completed.

7. Click **Finish**.

A warning message appears stating that you must restart your computer to complete uninstall process of Argus Insight.

Be sure to save your work and close other open applications before continuing.

8. Click **OK** to restart the Argus Insight Web Server.

11.1.1 Deleting the Argus Insight Folder from the Web Server

After you uninstall the Argus Insight application, you must restart the server. In addition, you must manually remove the Argus Insight folder from the installation directory. The install wizard does not automatically remove this folder.

To remove the Argus Insight folder after an uninstall:

1. Log in to the Argus Insight Web Server as a user with administrator privileges.
2. Go to the Argus Insight installation directory (that is, the directory where Argus Insight was installed before you uninstalled the application).
3. Delete the Argus Insight folder and its contents from this location.

11.1.2 Resetting the IIS

If you uninstall Argus Insight, be sure to reset the Internet Information Services (IIS) before you install the Argus Insight application again.

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| | |
|------------------|---------------------------|
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The data format used by the zlib library is described by RFCs (Request for Comments) 1950 to 1952 in the files:

- <http://www.ietf.org/rfc/rfc1950.txt> (zlib format)
- <http://www.ietf.org/rfc/rfc1951.txt> (deflate format)
- <http://www.ietf.org/rfc/rfc1952.txt> (gzip format)