ACTIVE Governance™

Installation Guide

Software Version 7.0

LogicalApps®

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Chapter 1

ACTIVE Governance Installation Overview

ACTIVE Governance both documents and enforces business controls, enabling users to demonstrate regulatory compliance and to promote operational efficiency. It consists of an ACTIVE Governance Platform, which provides control documentation, approval, and reporting capabilities, and at least one of three modules that enforce controls. ACTIVE Access Governor prevents or detects segregation-of-duties conflicts; ACTIVE Data Governor enforces controls on data-entry fields, forms, and business processes; and ACTIVE Policy Governor implements workflows consisting of one or more SQL statements that define actions subject to control, together with a sequence in which statements are evaluated and the records they return are designated as "suspect tasks."

ACTIVE Governance is a web-based application installed on a UNIX- or LINUX-based server and a Windows client. Its reporting capability relies upon Business Objects, a third-party software package, components of which are also installed on the server and client.

Certified Operating Systems

Certified operating systems include the following:

Red Hat Enterprise Linux 3.0. Required minimum operating system install plus Update 3 or greater. Higher patches are supported.

SUSE Linux Enterprise Server 9.0. Required minimum operating system install plus XFree86-4.3.99.902-43.22.i586.rpm, XFree86-libs-4.3.99.902-43.22.i586.rpm. Higher patches are supported.

Solaris 8 minimum install plus the following packages:

- SUNWgzip
- SUNWzlib
- SUNWscpu
- SUNWbash
- SUNWbcp
- SUNWxcu4 (XCU4 Utilities)
- SUNWxwfnt
- SUNWxwplt
- SUNWlibC
- SUNWeuluf (UTF-8 L10N For Language Environment User Files)
- SUNWuiu8 (Iconv modules for UTF-8 Locale)
- SUNWulcf (UTF-8 Locale Environment Common Files)
- SUNWmfrun
- SUNWxwice
- Solaris 8 Recommended Patch Cluster including:
  - kernel patch, 108528-24 or higher
  - C++ run-time, 108434-13 or higher
  - linker patch, 109147-26 or higher
  - Misc loc have errors in CTYPE and lv colln monetary, 109778-13 or higher
  - gzip patch, 112668-01 or higher
  - libz patch, 112611-02 or higher
  - tar patch, 110951-04 or higher
  - sh family patch, 109324-05 or higher
  - en_UTF-8 patch, 114059-02 or higher
- Additionally, thread, c and other library patch, 108993-32 or higher. Note that patch 108993-32 require the following to be installed first:
  - mntfs patch 111023-03
  - init patch 111317-05
  - mount patch 113648-03

  - netstrategy patch 115827-01
  - uadmin patch 116602-01

Solaris 9 minimum install plus the following packages:

- SUNWgzip
- SUNWzlib
- SUNWscpu
- SUNWbash
- SUNWbcp
- SUNWxcu4(XCU4 Utilities)
- SUNWxwfnt
- SUNWxwplt
- SUNWlibC
- SUNWeu8os (American English/UTF-8 L10N For OS User Files)
- SUNWeuluf (UTF-8 L10N For Language Environment User Files)
- SUNWuiu8 (Iconv modules for UTF-8 Locale)
- SUNWulcf (UTF-8 Locale Environment Common Files)
- SUNWmfrun
- SUNWxwice
- Solaris 9 Recommended Patch Cluster including:
  - kernel patch, 112233-11 or higher
  - libc, 112874-16 or higher
  - C++ run-time, 111711-06 or higher
  - linker patch, 112963-10 or higher
  - zlib patch, 115754-02 or higher
- Higher patches are supported.

AIX 5.1

- Required minimum operating system install for AIX 5L, plus Maintenance Level 5
- November 2003 C++ Runtime PTF => xlC.aix50.rte 6.0.0.10 (Note that this PTF requires Runtime of Level 6.0.0.0 to be installed prior to installing the PTF)
- Higher patches are supported

AIX 5.2

- Required minimum operating system install for AIX 5L plus Maintenance Level 2

- November 2003 C++ Runtime PTF => xlC.aix50.rte 6.0.0.10 (Note that this PTF requires Runtime of Level 6.0.0.0 to be installed prior to installing the PTF)
- Due to IBM PMR 90479,756,000 some customers may experience memory leaks. Customers should install AIX 5.2 ML4 or higher, and enable MALLOCTYPE=buckets in env.sh.
- Higher patches are supported

Microsoft Windows 2000 Data Center Server SP4

Microsoft Windows 2000 Advanced Server SP4

Microsoft Windows 2000 Server SP4

Microsoft Windows 2003 Server

Microsoft Windows 2003 Data Center Server

Microsoft Windows 2003 Enterprise Edition Server

Minimum Requirements

If you use Red Hat Enterprise Linux 3.0 or SUSE Linux Enterprise Server 9.0, your system must have at least:

- 700 MHz P3 processor
- 1 GB of RAM
- 4 GB of available hard-drive space

If you use Solaris 8 or 9, your system must have at least:

- SPARC v8plus
- 512 MB of RAM
- 4 GB of available hard-drive space

If you use AIX 5.1 or 5.2, your system must have at least:

- 1 CPU, Power 4
- 1 GB of RAM
- 4 GB of available hard-drive space

Minimum requirements for Windows operating systems are:

- 700 MHz P3 processor
- 512 MB of RAM, although 1 GB is recommended
- 3 GB of available hard-drive space
- CD-ROM

Chapter 2

Installing ACTIVE Governance

The installation of ACTIVE Governance involves installing ACTIVE Governance and Business Objects files on the server, completing a set of configuration tasks after installation, installing Business View Manager software on the client, and using Business View Manager to load Logical Apps reports. First, however, prepare for installation by completing the following steps:

1. Copy the LogicalApps DVD pack to a staging directory on the server that is to be used for ACTIVE Governance. This staging location is to be known in this document as $LAPPS_STAGE.
2. On the UNIX or LINUX platform:
   - Ensure that /tmp has at least 6 GB of space.
   - Create a UNIX user for LogicalApps (e.g., lapps).
   - Create an LAPPS_BASE directory (e.g., /usr/opt/lapps). This location should have at least 10 GB of space dedicated for LogicalApps ACTIVE Governance.
   - Create an LAPPS_AG directory as a subdirectory of $LAPPS_BASE (e.g., $LAPPS_BASE/ag70).
3. Check the following on the server that is to be used for LogicalApps:
   - Whether a MySQL instance is already running
   - Whether port 8080 is in use

Installing ACTIVE Governance Infrastructure

To install files necessary for ACTIVE Governance on the server:

1. Start the Business Objects Enterprise installer. Change to the following directory:

   ```
   $LAPPS_STAGE/bobje/<platform>/DISK_1
   ```

   Then type the following command:

   ```
   winstall
   ```

2. Once the installer has started, press the Enter key in the language selection screen to select the default (English).
3. Press Enter in the Install Type screen to accept the default New Installation option.
4. Press *Y* to accept the license agreement.
5. Enter the license code provided to you by LogicalApps.
6. Enter your LAPPS_AG directory (e.g., /usr/opt/lapps/ag70) as the installation directory.
7. Press Enter to accept the default User installation type.
8. Press Enter to accept the default New installation type.
9. Select 1 to install MySQL for the database and press Enter.
10. Change the MySQL port if an instance of MySQL is already running on the server. Enter a password for the MySQL database user. Press Enter when ready.
11. Press Enter to install Tomcat as the Application Server. (This is the default.)
12. Press Enter to accept the default ports for Tomcat if they are not in use. If port 8080 is in use, choose an alternate port.
13. Press Enter to begin the installation process.

Completing Postinstallation Tasks for ACTIVE Governance

Once server installation has finished, complete the following postinstallation steps:

1. Deploy the latest BusinessObjects InfoView web application:
   a. Enter the following commands:

      ```
      cd $LAPPS_AG/bobje/tomcat/webapps
      cp $LAPPS_STAGE/post-install/desktop.tar.gz .
      gunzip desktop.tar.gz
      tar xvf desktop.tar
      ```

   b. Edit $LAPPS_AG/bobje/tomcat/webapps/desktop/WEB-INF/web.xml. Locate the following lines and change the value <*HOST*> to the host name of your server:

```
<context-param>
    <param-name>cms.default</param-name>
    <param-value><HOST>:6400</param-value>
</context-param>
```

c Edit $LAPPS_AG/bobje/tomcat/webapps/desktop/WEB-INF/adhoc-config.xml. Locate the following lines and change the value <*HOST*> to the host name of your server. Note also that if you chose an alternate for port 8080 in step 12 of the installation procedure (see page 6), change the value *8080* in the following lines to the correct number for your alternate port:

```
<adhoc-config>
    <serverpath>http://<HOST>:8080/adhoc/</serverpath>
</adhoc-config>
```

2 Deploy the BusinessObjects Adhoc Reporting web application. Enter the following commands:

```
cd $LAPPS_AG/bobje/tomcat/webapps
cp $LAPPS_STAGE/post-install/adhoc.tar.gz
gunzip adhoc.tar.gz
tar xvf adhoc.tar
```

3 Edit the Tomcat startup settings.

a Enter the following command:

```
cd $LAPPS_AG/bobje
```

b Edit tomcatstartup.sh as follows:

At the beginning of the file, add `"CLASSPATH="`

Change every instance of *Xmx256m* to *Xmx784m*

4 Deploy the Oracle JDBC Thin Driver

a Enter the following commands:

```
cd $LAPPS_AG/bobje/jdbc
cp $LAPPS_STAGE/general/ojdbc.jar
cd $LAPPS_AG/bobje/java
```

b Edit the file CRConfig.xml. Add the following to the front of the <Classpath> element:

```
${BOBJEDIR}/jdbc/ojdbc.jar:
```

5 License the Crystal Reports Explorer (ad hoc reporting component) and Dashboard Manager.

a Log in to the Business Objects Enterprise Contral Management Console, at the following URL. If you chose an alternate for port 8080 in step 12 of the installation procedure (see page 6), change the value *8080* in the following URL to the correct number for your alternate port.

```
http://<host>:8080/businessobjects/enterprise11/admin/en/
admin.cwr
```

b Click on License Keys in the home page.

c Add the Crystal Reports Explorer Add-On by entering its license code, as provided you by LogicalApps.

d Add the Dashboard Manager Add-On by entering its license code, as provided you by LogicalApps.

6 Install required Business Objects patches:

a Enter the following commands:

```
cd $LAPPS_AG/bobje/enterprise11/generic
cp &LAPPS_STAGE/post-install/*.cf
./configpatch.sh adapt211857.cf
```

b When prompted select item 1:

```
This is to have the Report Hearders on the top
```

c Run the following command:

```
./config.sh adapt211857b.cf
```

d When prompted select item 1:

```
This is to have the Report Hearders on the top
```

7 Change the database records setting for the Business Objects RAS server:

a Log in to the Business Objects Enterprise Contral Management Console, at the following URL. If you chose an alternate for port 8080 in step 12 of the installation procedure (see page 6), change the value *8080* in the following URL to the correct number for your alternate port.

```
http://<host>:8080/businessobjects/enterprise11/admin/en/
admin.cwr
```

b Click on Servers in the home page.

c Click on the RAS server.

d Set DB Records to unlimited.

8 Configure the InfoView home page. Enter the following commands:

```
cp $APPS_AG/bobje/tomcat/webapps/desktop/InfoView/res/
schema.blue/banner_logo.gif $Apps_AG/bobje/tomcat/webapps/
desktop/InfoView/res/schema.blue/banner_logo.gif.bak

cp $LAPPS_Stage/post-install/banner_logo.gif
$APPS_AG/bobje/tomcat/webapps/desktop/InfoView/res/
schema.blue/banner_logo.gif

chmod u+rw $APPS_AG/bobje/tomcat/webapps/desktop/InfoView/
res/schema.blue/banner_logo.gif

chmod go+r $APPS_AG/bobje/tomcat/webapps/desktop/InfoView/
res/schema.blue/banner_logo.gif

cp $LAPPS_Stage/post-install/la-reportcenter.gif
$APPS_AG/bobje/tomcat/webapps/desktop/InfoView/res/
schema.blue
```

9 Deploy the ACTIVE Governance web application. Enter the following commands:

```
cd $LAPPS_AG/bobje/tomcat/webapps/
cp $LAPPS_STAGE/post-install/onecenter.war .
```

10 Deploy the ACTIVE Governance web application's Tomcat configuration file. Enter the following commands:

```
cd $LAPPS_AG/bobje/tomcat/conf/
cp $LAAPS_STAGE/post-install/onecenter.xml .
```

11 Edit the oncenter.xml file to reference the appropriate data source name and JDBC connect string to the correct database.

12 Deploy the ACTIVE Governance environment script. Enter these commands:

```
cd $LAPPS_AG/acs70
cp $LAPPS_STAGE/post-install/acs-env.sh .
```

13 Deploy the ACTIVE Governance start/stop script. Enter these commands:

```
cd $LAPPS_AG/acs70
cp $LAPPS_STAGE/post-install/acs.sh .
```

14 Restart ACTIVE Governance.

Installing the Business Objects Client Component

On the Windows client system, install the Business View Manager:

1 Insert the LogicalApps DVD in disk drive of the Windows client.

2 Type the following command. (If your drive is other than D, insert the appropriate letter in place of the D in this command.)

```
D:\acs70\bobje\<platform>\setup.exe
```

3 When prompted, enter the license code provided to you by LogicalApps.

4 Choose client installation.

5 Accept all defaults.

Next, configure the Oracle JDBC driver:

1 Create the following directory:

```
C:\OracleJDBC
```

2 Copy the following file to the C:\OracleJDBC directory:

```
D:\acs70\general\ojdbc14.jar
```

3 Edit the following file:

```
C:\Program Files\Common Files\Business Objects\3.0\java\
CRConfig.xml
```

In this file, add the following to the front of the <Classpath> element:

```
c:\OracleJDBC\ojdbc.jar:
```

Installing LogicalApps Business Views and Reports

With Business View Manager installed and configured on the client system, you can use it to do the following:

- Import XML files that support Logical Apps reports.
- Establish data connections and dynamic data connections between the client and the Logical Apps data source.
- Publish reports in the Business View Manager repository.

Importing XML Files

To import XML files:

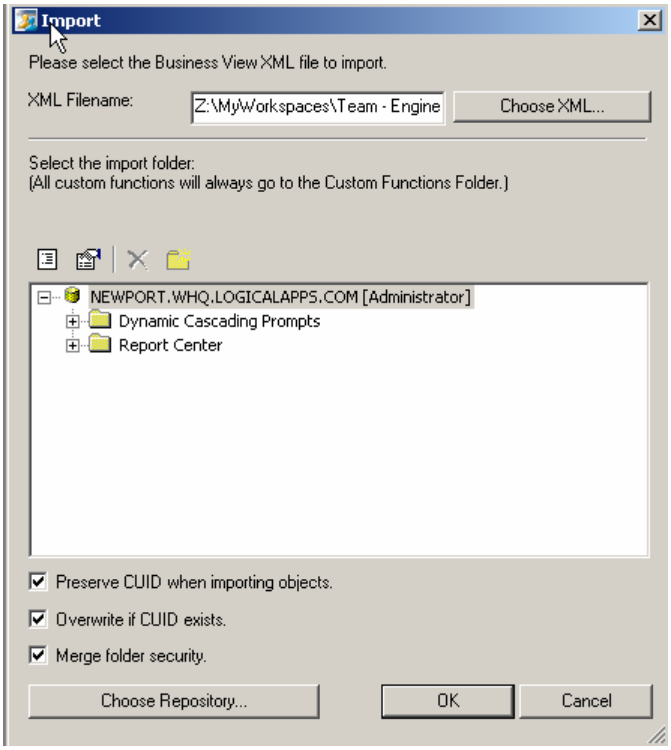
1 Open Business View Manager.

a In Windows, click on Programs > Business Objects XI > Business Objects Enterprise

b As Business View Manager opens, log in to the server.

c In Business View Manager, click on Tools in the menu bar and on Import in the Tools menu.

2 An Import dialog opens.



a Ensure that the line displaying the host name and domain name for the business objects server is selected.

b Click on the Choose XML button, navigate to the ./ACS70/xml directory of the installation disk, and select one of the XML files in that directory. The name and path of the file should appear in the XML Filename field.

c Ensure that the three checkboxes near the bottom of the form are selected. These are labeled "Preserve CUID when importing objects," "Overwrite if CUID exists," and "Merge folder security."

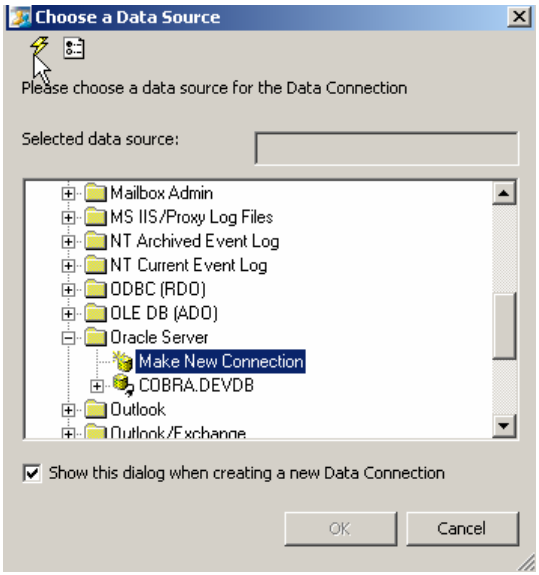
d Click on the OK button.

e Repeat this process for all XML files located in the Report Center subdirectory of the installation disk.

Establishing Data Connections

As you establish data connections and dynamic data connections between the client and the Logical Apps data source, you can set up either Oracle or JDBC. For you to use Oracle, the Orcale Client must be installed on your machine, and TNSNAMES in the Oracle Client must be configured with the same aliasees configured on the server side.

1 Open the Choose a Data Source dialog. In Business View Manager, click on File > New > Data Connection.

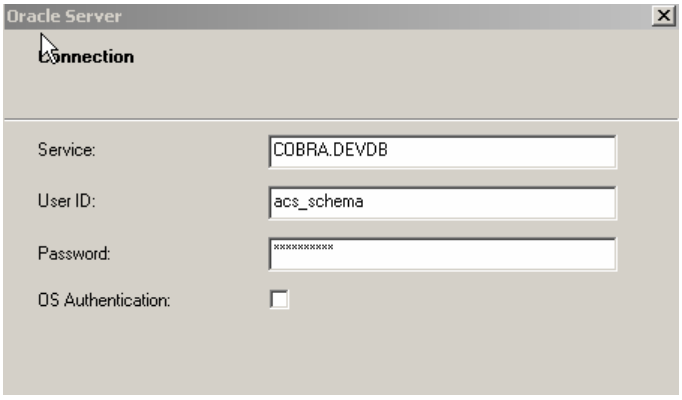


2 If you are setting up Oracle, click on the Oracle Server entry in the list. If you are setting up JDBC, click on the JDBC entry in the list.

If no connection yet exists, a Connection window appears. If data sources already exist, double click on the entry for your connection (for example, COBRA.DEVDB in the illustration) to produce the Connection window. In either case the window is specific to the type of data-source connection you are configuring — Oracle or ODBC.

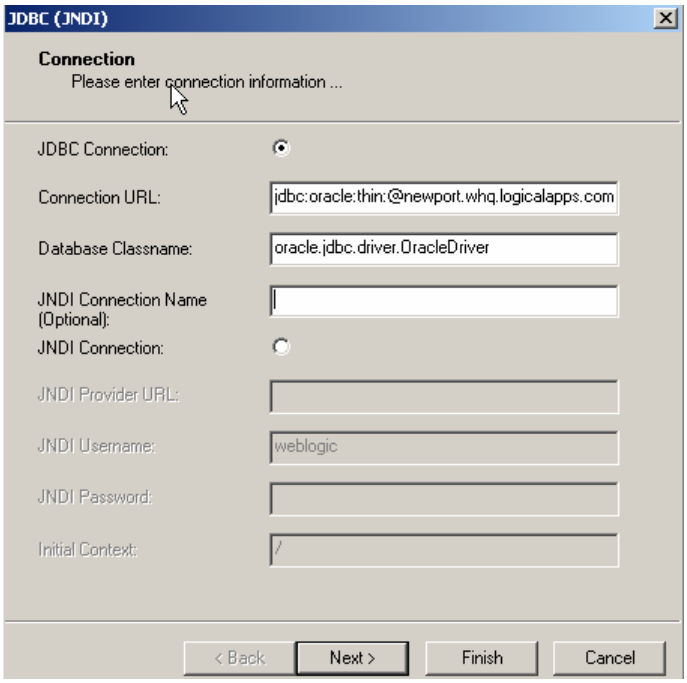
3 Complete fields in the Connection window.

If you are using Oracle, the window looks like this:



The correct entry for the Service field can be found in the TNSName.ora file on the client computer. Enter the User ID and Password set up by your database administrator. Leave the OS Authentication check box cleared.

If you use JDBC, the window looks like this:



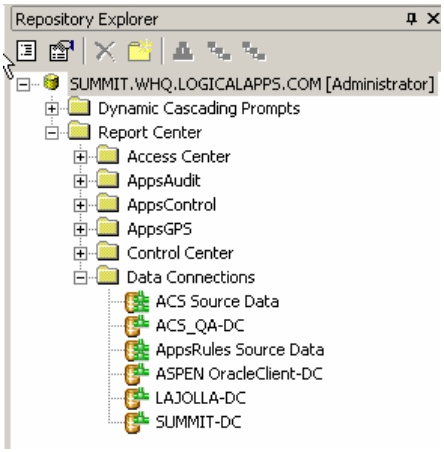
In the Connection URL field, the prefix *jdbc:oracle:thin:* is always present, and the remainder is the URL, port number, and service name configured for your system. The value for Database Classname is always *oracle.jdbc.driver.OracleDriver*.

4 In the Repository Explorer of Business View Manager, set up dynamic data connections (DDC).

a Double click on ACS Source Data (for connections to ACTIVE Governance source data).

b Double click on AppsRules Source Data (for connections to AppsRules source data.

Business Views are based on the DDC. The business views do not nee to be modified to point to the correct data source.

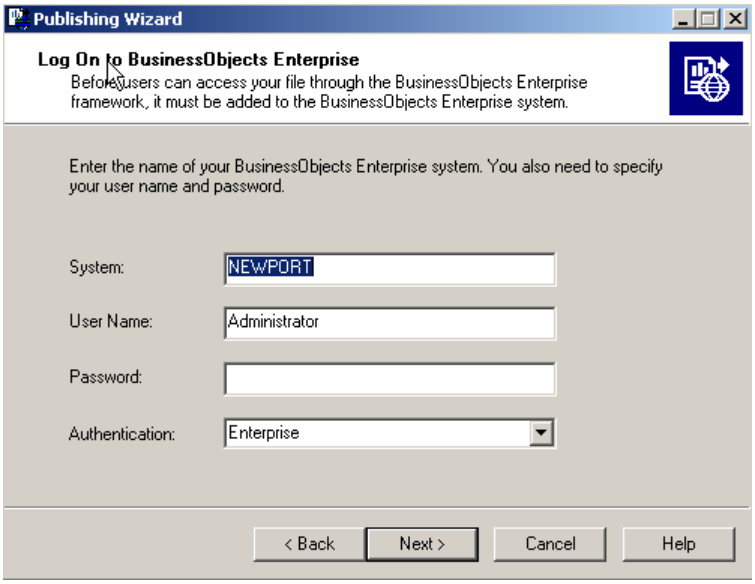


Publishing Reports

To publish LogicalApps reports in the Business View Manager repository:

1 Log on to the Publishing Wizard: in Windows, click on Programs > Business Objects XI > Publishing Wizard.

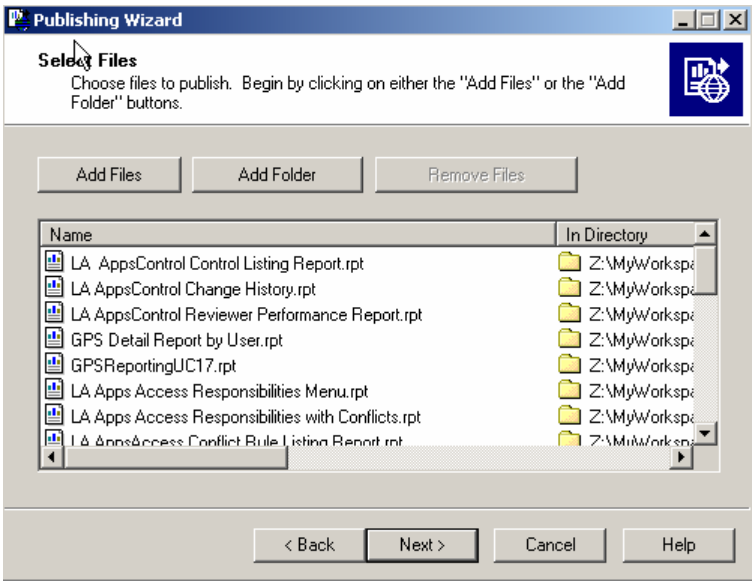
2 Complete fields in the Log On screen:



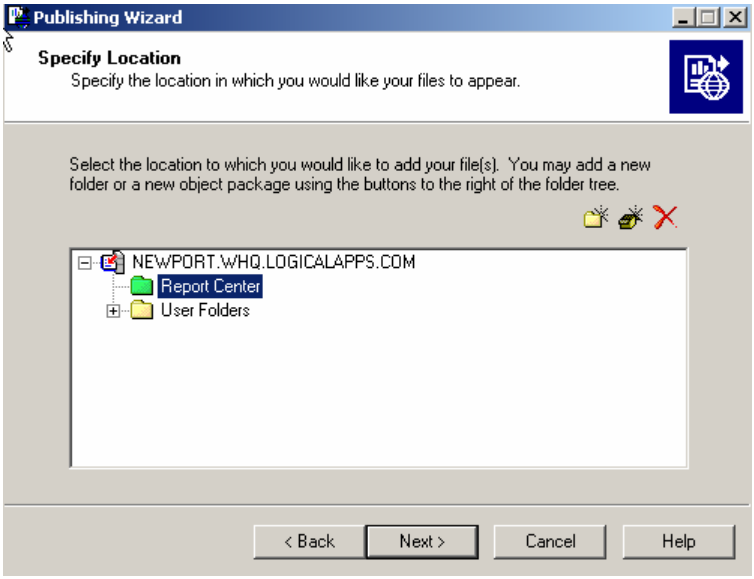
- System is the host name of your Business Objects server, as well as its port number if that number is not 6400 (the default). If you need to include the port number use the format *Name:nnnn*.
- Accept defaults for User Name and Password.

- The value for Authentication is always Enterprise.

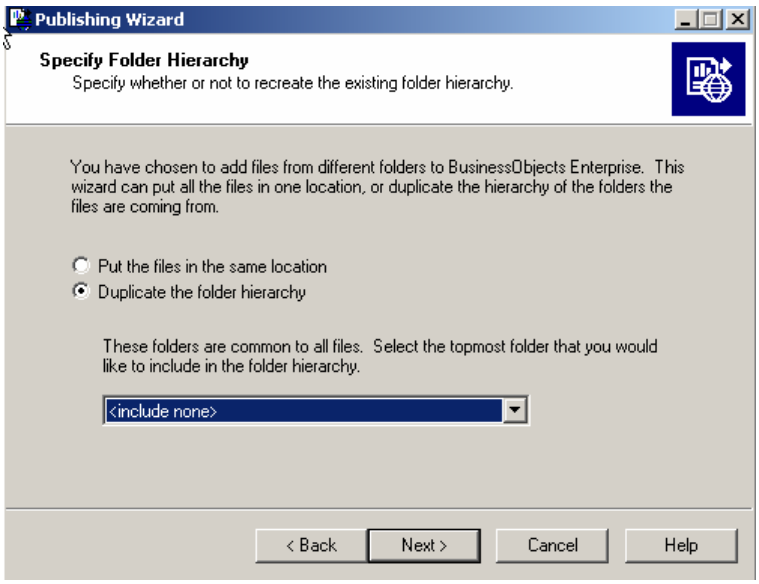
3 Click on the Next button. In the Select Files screen, click on the Add Folder button. Navigate to the ./ACS70/Report Center directory. Check the Include Subfolders option.



4 Click on the Next button. In a Specify Location screen, ensure that the line displaying the host name and domain name for the business objects server is selected. Click on the create-folder icon (the leftmost of the three above the white text area) and name the folder Report Center.



5 Click on the Next button. In a Specify Folder Hierarchy screen, select the "Duplicate the folder hierarchy" radio button and the "<include none>" option in the list box.



6 Click the Next button an this and the next several screens; accept default values until you reach the Specify Repository Refresh screen. In it, select Enable All, and ensure that the "Use Object Repository when refreshing report" check box is selected.

7 Click the Next button until you reach a Choose Default Values screen. In it, select the "Publish without modifying properties" option.

8 Click the Next button and accept defaults in any remaining screens until you can click the Finish button.