ACTIVE Governance™

Service Pack Installation Guide

Software Version 7.1

Logical Apps

Document Version AG007-710D

12/1/06

Contents

Service Pack 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 up to three modules that enforce controls. These include ACTIVE Access Governor™, ACTIVE Policy Governor™, and ACTIVE Data Governor™.

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

Moreover, ACTIVE Governance works in concert with AppsRules, a set of applications that runs within the Oracle E-Business Suite environment.

From time to time, LogicalApps issues service packs that resolve issues concerning the performance of ACTIVE Governance. The installation of such a service pack involves some combination of three procedures:

- Installing updated AppsRules files; if the service pack includes AppsRules files, they should be installed first. For installation procedures, see the *AppsRules Suite Installation Guide* for version 7.1.

- Substituting an updated ACTIVE Governance .war file for an existing ags.war file on the ACTIVE Governance Server.

- Upgrading reports in Business Objects. Because an update overwrites the run history of existing reports and report schedules, you may also want to back those up.

Chapter 2

Installing ACTIVE Governance Files

The installation of an ACTIVE Governance service pack involves replacing an existing ags.war file with an updated one on the ACTIVE Governance Server.

Preparation

During the original installation, a staging directory was created on the server. Locate that directory or, if it no longer exists, create a new one. The staging location is to be known in this document as $LAPPS_STAGE.

Also during the original installation, a LogicalApps base directory (for example, /usr/opt/lapps) was created on the server; it is to be known in this document as $LAPPS_BASE. An ACTIVE Governance directory was created as a subdirectory of the base directory (for example, $LAPPS_BASE/ag7); it is to be known in this document as $LAPPS_AG_HOME. Identify the path to $LAPPS_AG_HOME on your server.

You can set $LAPPS_BASE, $LAPPS_STAGE, and $LAPPS_AG_HOME as environment variables, enabling you, in subsequent procedures, to type these variable names in place of actual paths on command lines. To do so:

1   Navigate to the $LAPPS_AG_HOME directory.

2   Execute the following command:

```
$ . ag.env
```

Installation

To install an ACTIVE Governance service pack, complete the following steps. (Although an ACTIVE Governance instance may use a Tomcat or Oracle application server, the command examples in this procedure assume the use of Tomcat.)

1 From a site provided by LogicalApps, download the file ag_platform_*nn*SP*n*.zip to your $LAPPS_STAGE directory. In that name, the *n* values represent version and service-pack numbers. For example, the file for version 7.1 service pack 1 would be ag_platform_71SP1.zip.

2 Set the current path to the staging directory:

```
cd $LAPPS_STAGE
```

3 Extract the contents of the file you downloaded in step 1. (Substitute the actual version and service-pack numbers for the *n* values in the following command.)

```
unzip ag_platform_nnSPn.zip
```

The .zip file always contains at least the following two files: ags_*n_n_n_*s*nn_*b*nn_*sp*n*.war and ag_*nn*SP*n*_updateRelease.sql. In these names, the *n* values stand for version, schema, build, or service-pack numbers.

For example, the name ags_7_1_0_s41_b19_sp1.war indicates a file for service pack 1 of version 7.1, which incorporates schema number 41 and build number 19. Similarly, the file name ag_71SP1_updateRelease.sql designates a file for service pack 1 of version 7.1.

Make a note of the actual number values in the names of the files you extract; you'll need them as you use the files in later steps. Moreover you'll use the numbers from the .war file name to validate the installation.

4 Shut down the application server:

```
$LAPPS_AG_HOME/bobje/tomcatshutdown.sh
```

5 Remove the existing ACTIVE Governance .war file, and copy the service pack replacement .war file to the appropriate directory:

```
rm $LAPPS_AG_HOME/bobje/tomcat/webapps/ags.war

cp $LAPPS_STAGE/ags_n_n_n_snn_bnn_spn.war
$LAPPS_AG_HOME/bobje/tomcat/webapps/ags.war
```

Substitute correct version, schema, build, and service-pack numbers for the *n* values in the name of the replacement .war file (see step 3).

6 Remove the old ags directory and log files:

```
rm -rf $LAPPS_AG_HOME/bobje/tomcat/webapps/ags

rm $LAPPS_AG_HOME/bobje/tomcat/work/Catalina/localhost/ags/*

rm $LAPPS_AG_HOME/bobje/tomcat/logs/*
```

7 Restart the application server:

```
$LAPPS_AG_HOME/bobje/tomcatstartup.sh
```

8 Update ACTIVE Governance version information. (The following commands assume the use of Sql*Plus for running an update script and also the use of the conventional ACTIVE Governance schema name.)

a From the UNIX/Linux command prompt:

```
cd $LAPPS_STAGE
sqlplus /nolog
```

b Then from the Sql*Plus command prompt:

```
Sqlplus > connect xxlaapps_ag/ag
Sqlplus > @ag_nnSPn_updateRelease.sql
```

Substitute correct version and service-pack numbers for the *n* values in the replacement .sql file name (see step 3). If, as the file runs, you are prompted for a copy variable, enter the value *&copy*.

c Exit Sql*Plus:

```
Sqlplus > exit
```

Restarting Services

To activate the new ACTIVE Governance .war file, you must stop and then restart the ACTIVE Governance service. The following procedure restarts both it and the Business Objects service. If a service pack includes Business Objects updates, you can wait to complete procedures described in Chapter 3 before carrying out this restart operation. The process requires that ag.env has been run to set environment variables; see page 3.

1 On the ACTIVE Governance server, navigate to the $LAPPS_AG_HOME directory.

2 Enter the following commands:

```
Stop
Start
```

Validation

To validate the service-pack installation, perform two procedures. You can complete the first procedure either before or after you have restarted the ACTIVE Governance service:

1 On the ACTIVE Governance server, navigate to the $LAPPS_AG_HOME directory.

2 Execute the following command:

```
Md5sum ags.war
```

**3** The result is a checksum value. Compare this value with one given in *Release Notes* for the service pack you are installing. If the two values are equal, the service-pack installation is valid.

The second returns correct results only after the ACTIVE Governance service has been restarted.

1   Start the ACTIVE Governance Platform: Type the URL for your instance of ACTIVE Governance in the Address field of Internet Explorer, and press the Enter key. In the Sign In dialog, enter your user name and password, and click on the Sign In button.

2   In the ACTIVE Governance Platform, click on the Administration tab.
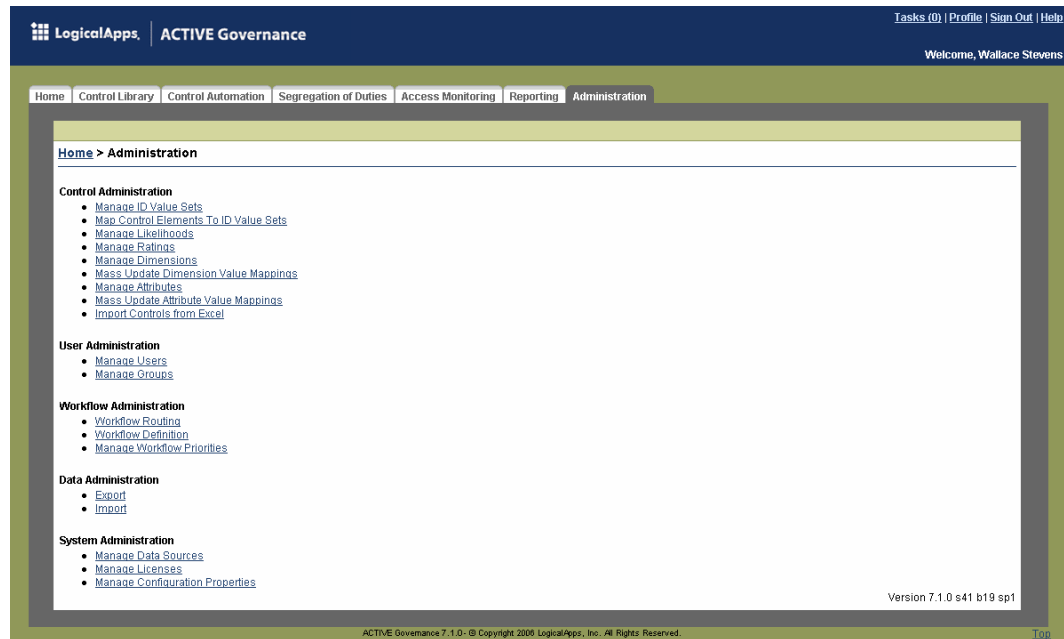
3   In the lower right corner of the white portion of the Administration Home, review the software version, schema, build, and service-pack numbers. These should match the values contained in the name of the replacement .war file that you installed in step 5 of page 4. (For validation purposes, ignore the version number displayed in the green border at the bottom of each ACTIVE Governance panel.)

Chapter 3

Business Objects Upgrade

If the service pack files available to be downloaded from LogicalApps include a zip file whose name begins *ag_reportcenter*, then the service pack includes modified reports and you need to upgrade Business Objects components. To do so, you would work form the Windows client where, during the original installation procedure, you installed the Business Objects Business View Manager.

The process includes up to four broad steps:

- Replacing existing business views (.xml files) with updated views.

- Backing up existing reports (.rpt files), so that their report history and schedules are not lost. (This step is optional.)

- Publishing the updated reports through use of a Business Objects Publishing Wizard.

- Configuring access to reports.

Replacing Business Views

To install updated business views on your system:

1 From a site provided by LogicalApps, download the file ag_reportcenter_ *nn*SP*n*.zip to a staging directory on the Windows client. In that file name, the *n* values indicate version and service-pack numbers; for example, the file for version 7.1 service pack 1 would be ag_reportcenter_71SP1.zip.

2   Navigate to your staging directory and, in it, extract the contents of the file you downloaded. (Substitute the actual version and service-pack numbers for the *n* values in the following command.)

```
unzip ag_reportcenter_nnSPn.zip
```

3   Log in to the Business View Manager.

4   In the Repository Explorer, click on the plus sign for the Report Center folder. A selection of subfolders appears.

5   Within this selection, delete each of the business views you are going to replace. These correspond to the names of .xml files contained within a Business Views folder, which is one of the items you extracted from the .zip file in step 2. (Note that some of these may exist in subfolders of the Report Center subfolders — for example, SOD User Conflicts Summarized exists within Report Center/ Segregation of Duties.) For each, right click on the item and then select the Delete option.
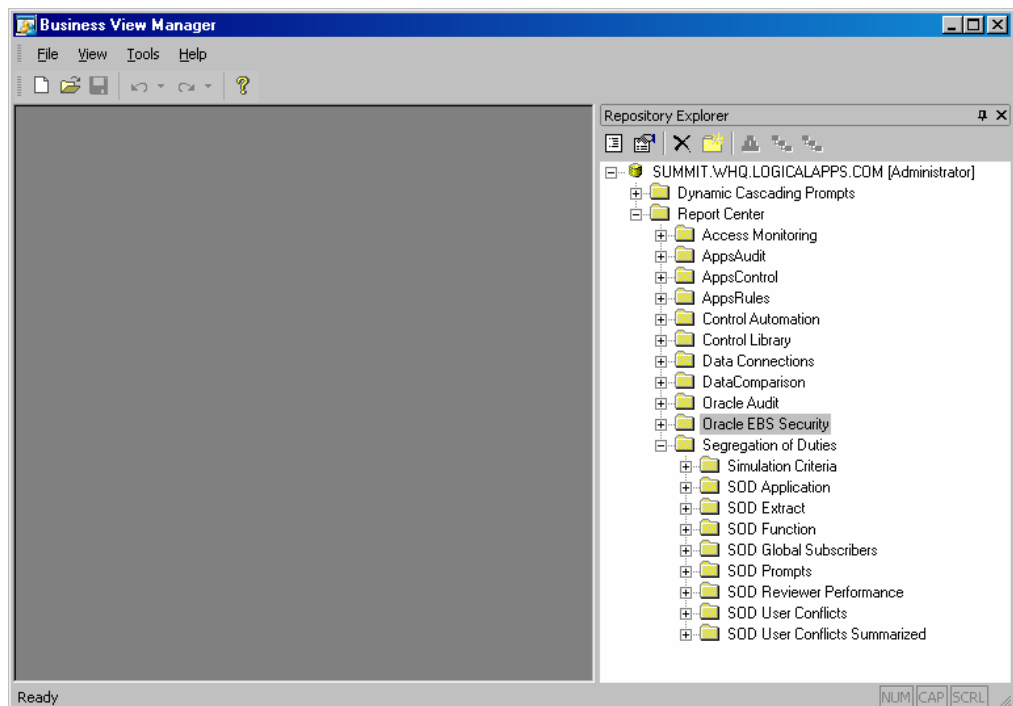
6   Select the Import option from the Tools menu. An Import dialog appears

Click on the Choose XML button and, in an Open dialog, navigate to the staging folder. Select one of the files you extracted in step 2. Click on the instance shown at the top of "Select the import folder" field. Ensure that the three check boxes (Preserve CUID when importing objects, Overwrite if CUID exists, and Merge folder Security) are selected. Click on the OK button.

Repeat this process for each of the files you extracted in step 2.

7   In the Repository Explorer, click on the plus sign for the Data Connections sub-folder of the Report Center folder. A list of data connections appears.

8 Double click on the AppsRules Source Data subfolder.
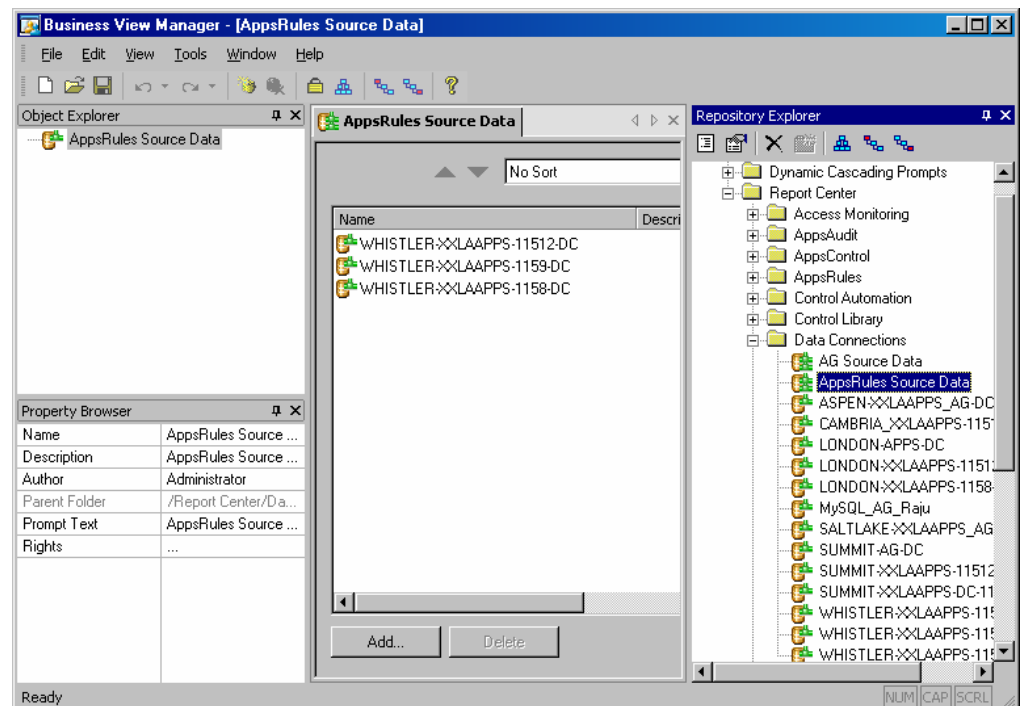
9 Delete all the data sources contained within the AppsRules Source Data sub-folder. (In the example illustrated above, these are the three items that begin with the word *WHISTLER*, located in the center panel.)

10 Drag each of your data sources from the Data Connections list to the AppsRules Source Data subfolder (again, the center panel).

11 In the Data Connections list, double click on each of your data sources. In the Property Browser, confirm that all the connection information is correct (particularly the password).

Backing Up Old Reports

To back up the reports you are replacing:

1 Open the Central Management Console (CMC). Use the following URL:

```
http://Hostname:PortNumber/businessobjects/enterprise11/admin/
en/admin.cwr
```

Replace *Hostname* and *PortNumber* with the values appropriate for your instance of ACTIVE Governance.

2 Log in to the CMC. Use *Administrator* as the user name and supply the password for your site.

3 In the CMC, click on the Folders link.

4 Create backup subfolders that correspond to report subfolders in your staging directory. (These are subfolders you extracted from the .zip file you downloaded in step 2 on page 8; each contains .rpt files.)

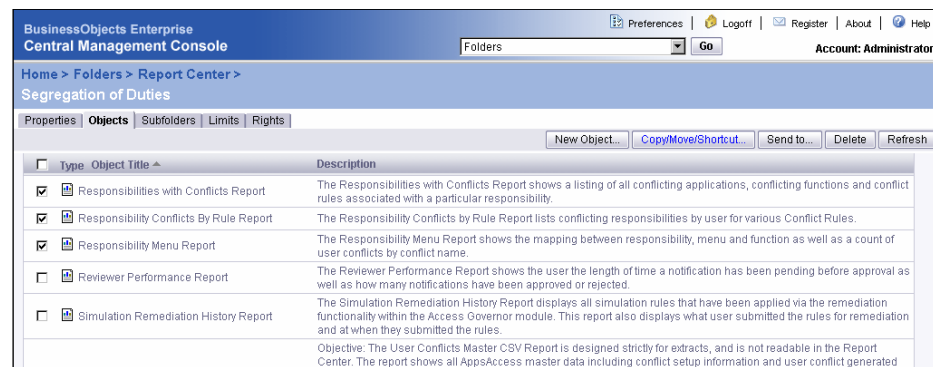   **a** Click on the New Folder button:
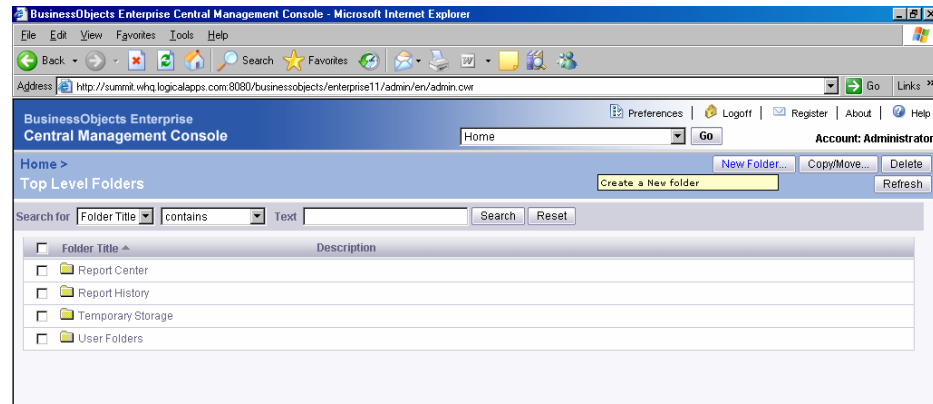
    b Type the name for the folder in the Folder Name field. Click on the OK button.
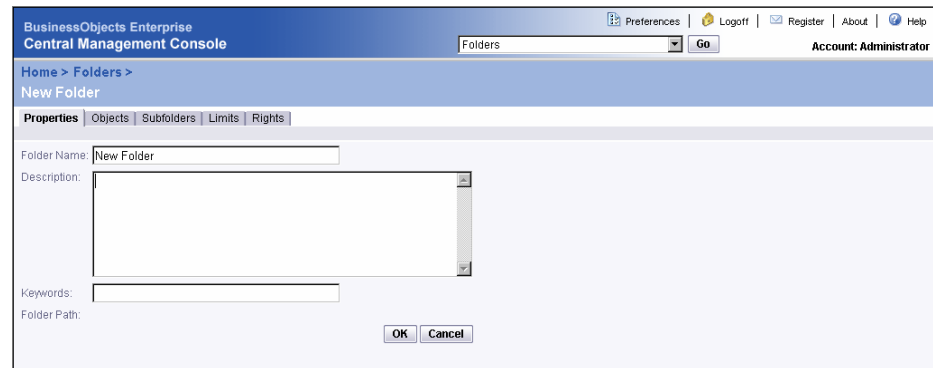
    c You can use the same procedure to create additional subfolders under the one you've just created.

5 Click on the Folders link in the "breadcrumb" trail, and click on entry for the Report Center folder. A list of subfolders appears; click on a subfolder that contains reports you want to back up. (These subfolders, once again, correspond to report subfolders in your staging directory, which you extracted from the .zip file you downloaded in step 2 on page 8.)

6 Click in the check boxes for the reports you want to back up. Then click on the Copy/Move/Shortcut button. The following window appears:
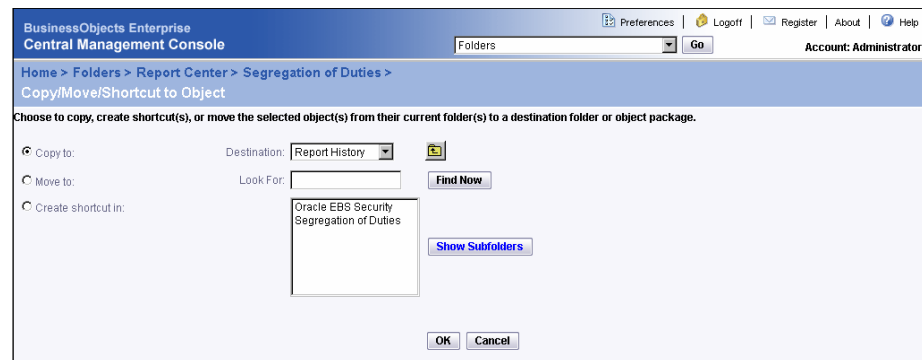
7 In the field that lists folder names, click on the backup folder you created. If you have created subfolders for that folder, click on the Show Subfolders button and select the subfolder you want.

8 Select the Move to radio button.

9 Click on the OK button.

10 Repeat this process for any other reports you need to back up.

Publishing the New Reports

Publishing the new reports involves a process similar to backing up the old reports, except that now you are moving reports from your staging directory to the Report Center folder. However, you use a Publishing Wizard, which is accessible from the Business Objects folder under Windows Start.

1 From the initial Publishing Wizard screen, click on the Next button.

2 Enter logon values: For System, supply the host name of the ACTIVE Governance server. For User Name, supply *Administrator*. For Password, supply the password created for your instance. Authentication is always *Enterprise*. Click the Next button.

3 A Select Files panel of the Publishing Wizard opens. In it, click on the Add Files button. In an Open dialog, navigate to your staging directory. Within the staging directory are subdirectories you extracted from the .zip file you downloaded in step 2 on page 8. Within each subdirectory are .rpt files.

Open one of the subdirectories, select all its .rpt files, and click on the Open button. The files are now listed in the Publishing Wizard. Click on the Next button.

4 A Specify Location panel of the Publishing Wizard opens. In it, navigate to the Report Center subfolder in which you want to place the reports. Click on the Next button.

5 A Confirm Location panel of the Publishing Wizard opens. It displays the file names below the folder in which they will be published. Confirm that the values are correct, and click on the Next button.

6 In the next several Publishing Wizard panels, you need to nothing. Click on the Next button until you reach the Specify Repository Refresh panel. That panel lists the reports you are publishing; in it, click on the Enable All button. Then click on the Next button.

7 In the next several Publishing Wizard panels, you need to nothing. Click on the Next button until you reach the Reading Files panel. When the Wizard finishes reading files, another panel lists the reports you are publishing. Click on the Next button. This commits the objects; finally, click on the Finish button.

8 Repeat steps 3–7 for reports located in other folders, if any.

Configuring Access to Reports

Within ACTIVE Governance, each user is assigned a "primary application role" and any number of "reporting roles." Each of the reporting roles specifies a selection of reports the user is able to open and review. After publishing a new set of reports, you must complete the following steps to correlate each report to its reporting roles:

1 Navigate to a bo_setup subdirectory of the staging directory on your ACTIVE Governance server:

```
cd $LAPPS_STAGE/bo_setup
```

2 Using a text editor, open a file called BusinessObjectsConfiguration.properties. In it, set the businessObjects.commit property to false. Save the file and close it.

3 Set execute permissions on a file called run.sh:

```
chmod +x run.sh
```

4 Execute the file:

```
run.sh
```

5 Executing the run.sh file generates a log file. Check it for errors:

```
grep -i error log.txt
```

6 If you find errors, call LogicalApps Technical Support.

If you find no errors, reopen the BusinessObjectsConfiguration.properties file and reset the businessObjects.commit property to true. Save the file and close it. Then re-execute the run.sh file.

Restarting Services

To implement the report changes you've made, you must stop and then restart the Business Objects service. A single procedure stops and restarts both the ACTIVE Governance and Business Objects services; see page 5. The procedure requires that you have executed the ag.env file to set environment variables; see page 3.