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Introduction
About this guide

The BusinessObjects Planning installation guide contains sections with detailed instructions on installing each of the following:

- BusinessObjects Planning sites
- BusinessObjects Planning Web applications and BusinessObjects Planning Server components
- BusinessObjects Planning workstation applications

BusinessObjects Planning sites

This chapter contains information about installing and configuring BusinessObjects Planning sites. A site is comprised of a database server and a file server, connected via a network, on which the BusinessObjects Planning database files and shared components reside. Once you have installed a BusinessObjects Planning site, you can install and configure BusinessObjects Planning applications, distribution systems, servers, or other components, depending on your particular business needs and environment.

This chapter is intended for people installing and configuring a BusinessObjects Planning site. It assumes knowledge of the following:

- The Windows® operating system (2000 or 2003)
- Database systems (SQL Server or Oracle)

BusinessObjects Planning Server components

This chapter contains information about installing BusinessObjects Planning Web applications and BusinessObjects Planning Server components across an enterprise to enable Internet-based access to a BusinessObjects Planning site.

This chapter is intended for technical users who will be performing the installation of the BusinessObjects Planning product. It assumes knowledge of the following:

- The Windows® operating system
- Basic networking principles and server clusters
- Microsoft® IIS

In addition to these requirements, you must have organizational rights to set up new software and new users; these rights are domain administered.

BusinessObjects Planning workstation applications

This chapter contains information about installing BusinessObjects Planning workstation applications across a client enterprise.
This chapter is intended for either administrators or users who will be installing the BusinessObjects Planning client applications. It assumes that you know how to use the Windows® operating system. You must have organizational rights to set up new software; these rights are domain administered.

Document conventions

Typefaces

The table below presents the different typefaces used in the guide:

<table>
<thead>
<tr>
<th>Typeface</th>
<th>Meaning</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Names of windows, dialog boxes, menus, menu commands and buttons</td>
<td>The <strong>Installation Directory</strong> dialog box will appear.</td>
</tr>
<tr>
<td>Menu &gt; Command</td>
<td>Menu command</td>
<td>Select <strong>New &gt; Data source</strong>.</td>
</tr>
<tr>
<td>Code</td>
<td>Command line</td>
<td><strong>CtStopServer.vbe_SrvBroker_Magnitude</strong></td>
</tr>
<tr>
<td>Code on gray</td>
<td>All or part of a configuration file to be checked or changed</td>
<td><code>&lt;add key=&quot;CompressionLevel&quot; value=&quot;Normal&quot; /&gt;</code></td>
</tr>
<tr>
<td>background</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Numbered list</td>
<td>Procedure or series of steps to be performed</td>
<td>1. Right-click to select <strong>New &gt; Virtual Directory</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. The following dialog box will appear:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Click on <strong>Next</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Open a <strong>Command Prompt</strong> dialog box.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Run the <strong>C:&gt;iisreset /restart</strong> command line.</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Value to be set</td>
<td><code>&lt;datasource_name&gt;</code></td>
</tr>
<tr>
<td>_</td>
<td>Compulsory space between settings</td>
<td>**CtStartServer.vbe_&lt;datasource_manager&gt;`</td>
</tr>
<tr>
<td>&quot; &quot;</td>
<td>To be inserted if spaces are used in a setting</td>
<td><code>&lt;&quot;datasource_password&quot;&gt;</code></td>
</tr>
<tr>
<td>[]</td>
<td>Optional setting</td>
<td><code>&lt;&quot;datasource_password&quot;&gt;_[&lt;server&gt;]</code></td>
</tr>
</tbody>
</table>
About BusinessObjects Planning

The BusinessObjects Planning product suite provides Web-enabled, vertical industry-targeted enterprise analytics software that helps companies measure, analyze, and predict business performance and profitability. Organizations leverage the suite for real-time business planning and forecasting, accelerating mergers and acquisitions, understanding business performance by customer segment, product, channel and business line, and delivering performance management information across the enterprise.

BusinessObjects Planning is the only suite that is selectively packaged into a series of applications, each one tailored to support a different segment of the user community. Moreover, every user leverages a common information infrastructure. All user applications are driven by the same set of data, business rules, user rights, and report templates, and any changes are automatically synchronized across the enterprise.

The product suite includes the following applications:

**BusinessObjects Planning Administrator**

BusinessObjects Planning Administrator allows nontechnical users to rapidly and easily configure, deploy, and administer BusinessObjects Planning applications across multiple sites. From a central site—and leveraging intuitive graphical interface, drag-and-drop function, and advanced automation capabilities—users can install and synchronize geographically dispersed sites, assign user access rights, and build and manage multiple business models.

**BusinessObjects Planning Analyst Pro**

BusinessObjects Planning Analyst Pro is designed for nontechnical users who have sophisticated information requirements. A comprehensive range of formatting features, and drag-and-drop functions allow users to easily create and maintain reports. In addition, users can quickly build, manage, and execute scripts that automate complex tasks such as scheduled report production and distribution.

**BusinessObjects Planning Analyst**

BusinessObjects Planning Analyst provides secure remote access to real-time report information anywhere, anytime, through a Web browser. Intelligent graphic indicators, drill-down toolbars, built-in annotation capabilities, forecasting tools, and a sophisticated charting interface allow users to easily view, enter, and edit report data.
BusinessObjects Planning Excel Analyst

The BusinessObjects Planning Excel Analyst allows users to leverage advanced analytics, superior performance, and automated information synchronization and distribution capabilities, all from within a familiar Microsoft® Excel environment.

Related documentation

For information about using BusinessObjects Planning, please refer to the following documentation:

**BusinessObjects Planning Server Components Administration Guide**

This guide, designed for administrators, describes how to configure and manage BusinessObjects Planning Servers and BusinessObjects Planning Gateways. It provides information about: using the BusinessObjects Planning Site Monitor tool to manage the BusinessObjects Planning enterprise, the Planning.ini configuration file, load balancing, and other configurable properties.

**Using the BusinessObjects Planning Configuration Assistant**

This guide describes how to use the BusinessObjects Planning Configuration Assistant to configure client applications, create or modify connections to BusinessObjects Planning sites, or create configuration reports to aid in troubleshooting.

**Administrator’s Guide**

This guide describes how to configure, customize, and maintain BusinessObjects Planning applications on behalf of other users. This guide includes conceptual and background information on the features and functions of the applications. It also gives examples of how to use BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro.

**BusinessObjects Planning Reporting Guide**

This guide describes how to create, use, and format reports using BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro. This guide explains reporting-related concepts and provides step-by-step instructions.

**Using BusinessObjects Planning Analyst**

This guide describes how to use BusinessObjects Planning Analyst to access, view, and analyze BusinessObjects Planning Analyst reports in a World Wide Web environment.
Using the BusinessObjects Planning Excel Analyst

This guide serves two purposes. It describes how to use the BusinessObjects Planning Excel Analyst to access, view, and analyze BusinessObjects Planning reports in an Excel environment. It also describes how to use the BusinessObjects Planning Excel Analyst to create ad hoc reports that query business rules and data in your BusinessObjects Planning environment. This guide explains reporting-related concepts and provides step-by-step instructions.

BusinessObjects Planning Workflow Guide

This guide is intended for BusinessObjects Planning users who deal with their organization's Workflow plans and who are responsible for administering, submitting, and approving Workflow scenarios. It contains conceptual and background information on the elements of Workflow in BusinessObjects Planning and gives examples of how to apply Workflow to an organization's planning and forecasting process. As Workflow functions are not specific to one application in BusinessObjects Planning, this guide includes Workflow-related information for BusinessObjects Planning Administrator, BusinessObjects Planning Analyst Pro, BusinessObjects Planning Analyst, and the Workflow Console.

Configuring Security

This guide, designed for administrators, describes how to configure and manage authentication and security for a BusinessObjects Planning site.

Online help

The online help provides step-by-step instructions for using BusinessObjects Planning applications. The online help also provides reference and conceptual information. To access online help in BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro, select Help from the Help menu on the Organizer toolbar, or press F1. To access online help in BusinessObjects Planning Analyst, BusinessObjects Planning Excel Analyst, or the Workflow Console, click the Help button on the application toolbar.

Business Objects technical support

If you encounter difficulties during the installation, configuration or administration of the product, you should contact the person within your workgroup who is in charge of centralizing queries. This person will then liaise with your IT team and if required, with the Business Objects Software Support team.

You should provide the following information when reporting the problem:
• The version number of the product installed on your computer
• The environment used e.g. Web, Citrix, Windows, etc.
• The type of database (e.g. Oracle, Microsoft SQL Server, etc.) and its version
• The operating systems of the servers and clients
• The network connection, e.g. RNIS, WAN, LAN, etc. and other software components such as Internet Explorer, IIS, etc.
• The exact text of the messages that appear when a problem occurs
• A clear problem statement
• The action plan implemented to try to solve the problem

You should also provide the corresponding screen shots, log files, error messages and any other tools to identify the problem.
Checklist for installing BusinessObjects Planning
Overview

- “Installing a BusinessObjects Planning site” on page 19
- “Installing a BusinessObjects Planning server” on page 21
- “Installing a BusinessObjects Planning web site and gateway” on page 22
- “Testing the web site, gateway, server and site installation” on page 23
- “Installing BusinessObjects Planning Scheduler” on page 24
- “Installing BusinessObjects Planning Web Redirector” on page 25
- “Installing BusinessObjects Planning client application” on page 26
- “Installing BusinessObjects Planning Excel Analyst” on page 27
- “Testing the application installation” on page 28
# Installing a BusinessObjects Planning site

<table>
<thead>
<tr>
<th>Step 1 - Install a BusinessObjects Planning Site</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>On an SQL Database</strong></td>
<td></td>
</tr>
<tr>
<td>1. Create a dedicated Windows account to act as the Core user account. This account will be the administrative owner of the BusinessObjects Planning site. For example, you could create a valid Windows user account with the identifier PLANNINGADMIN and with a password that never expires.</td>
<td>“Appendix C: System-Generated Users and Groups” in the Administrator’s Guide</td>
</tr>
<tr>
<td>2. Run Site Assistant.</td>
<td>“Installing a site on an SQL Server Database” on page 35</td>
</tr>
<tr>
<td><strong>On an Oracle database</strong></td>
<td></td>
</tr>
<tr>
<td>1. Create a dedicated Windows account to act as the Core user account. This account will be the administrative owner of the BusinessObjects Planning site. For example, you could create a valid Windows user account with the identifier PLANNINGADMIN and with a password that never expires.</td>
<td>“Appendix C: System-Generated Users and Groups” in the Administrator’s Guide</td>
</tr>
<tr>
<td>2. Establish a connection between the Oracle client and the Oracle service using a Service ID (SID) or Service Name. The SID or Service Name identifies the location of the server on the network. Both names may be found either locally in the TNSNames.ora file or in a centralized location on the name server, depending on your configuration.</td>
<td>“Creating the database tables” on page 51</td>
</tr>
<tr>
<td>3. Create the database tables. The installer cannot create these tables.</td>
<td>“Optimizing an Oracle 10g database” on page 53</td>
</tr>
<tr>
<td>4. If you are installing a BusinessObjects Planning site on an Oracle 10g database, optimize the database to increase BusinessObjects Planning performance.</td>
<td></td>
</tr>
<tr>
<td>5. Run Site Assistant.</td>
<td>“Running the BusinessObjects Planning Site Setup program” on page 54</td>
</tr>
</tbody>
</table>
### Checklist for installing BusinessObjects Planning

**Installing a BusinessObjects Planning site**

**Step 2- Configure a BusinessObjects Planning Site**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Configure shared folder access.</td>
<td>“Configuring shared folder access” on page 66</td>
</tr>
</tbody>
</table>

**Step 3- Modify Site Configuration**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Run site assistant. Select second option.</td>
</tr>
</tbody>
</table>

**Step 4- Back Up, Restore and Migrate Sites**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Back up the BusinessObjects Planning shared folder. The database and the shared folder must be backed up at the same time, otherwise they are not synchronized.</td>
<td>“Backing up the BusinessObjects Planning shared folder” on page 73</td>
</tr>
<tr>
<td>2.</td>
<td>Restore the BusinessObjects Planning shared folder.</td>
<td>“Restoring the BusinessObjects Planning shared folder” on page 73</td>
</tr>
<tr>
<td>3.</td>
<td>Back up the SQL database.</td>
<td>“Backing up an SQL database” on page 74</td>
</tr>
<tr>
<td>4.</td>
<td>Restore the SQL database.</td>
<td>“Restoring a database” on page 76</td>
</tr>
<tr>
<td>5.</td>
<td>Migrate the site.</td>
<td>“Migrating a site” on page 79</td>
</tr>
</tbody>
</table>
Installing a BusinessObjects Planning server

<table>
<thead>
<tr>
<th>Step 1 - Install a BusinessObjects Planning server</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. .Net 2.0 framework must be present on the machine.</td>
<td>For more information, see...</td>
</tr>
<tr>
<td>2. Set up one or more user accounts for the server.</td>
<td>“Installing BusinessObjects Planning Server” on page 93</td>
</tr>
<tr>
<td>3. Install and configure a TCP/IP protocol.</td>
<td>“Starting BusinessObjects Planning Server” on page 98</td>
</tr>
</tbody>
</table>
# Installing a BusinessObjects Planning web site and gateway

## Step 1 - Install a BusinessObjects Planning web site and gateway

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Install IIS (Internet Information Services). This is a prerequisite to installing the web site.</td>
<td>&quot;Installing a BusinessObjects Planning site&quot; on page 19 and &quot;Installing a BusinessObjects Planning server&quot; on page 21</td>
</tr>
<tr>
<td>2.</td>
<td>Install BusinessObjects Planning site, server, Administrator (or BusinessObjects Planning Analyst Pro).</td>
<td>&quot;Installing the BusinessObjects Planning Web site and Gateway on one machine&quot; on page 100</td>
</tr>
<tr>
<td>3.</td>
<td>Install BusinessObjects Planning web server and web gate on the same machine.</td>
<td>&quot;Installing the BusinessObjects Planning Web site and Gateway on two machines&quot; on page 112</td>
</tr>
<tr>
<td>4.</td>
<td>Install BusinessObjects Planning web server and web gate on two different machines.</td>
<td>the Configuring Security Guide</td>
</tr>
<tr>
<td>5.</td>
<td>If installed on Windows 2003 Server, customize security settings.</td>
<td></td>
</tr>
</tbody>
</table>
## Testing the web site, gateway, server and site installation

<table>
<thead>
<tr>
<th>Step 1 - Test the installation</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Test the installation of the BusinessObjects Planning site, application server, web server and gateway</td>
<td>“Testing the installation” on page 187</td>
</tr>
</tbody>
</table>
Installing BusinessObjects Planning Scheduler

Step 1 - Install BusinessObjects Planning Scheduler

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Install and configure a planning site.</td>
<td>&quot;Installing a BusinessObjects Planning site&quot; on page 19</td>
</tr>
<tr>
<td>2.</td>
<td>Set up a domain user account.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>If installed on Windows 2003 Server, customize security settings.</td>
<td>the Configuring Security Guide</td>
</tr>
</tbody>
</table>
## Installing BusinessObjects Planning Web Redirector

<table>
<thead>
<tr>
<th>Step 1 - Install BusinessObjects Planning Web Redirector</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Determine the URL of the central BusinessObjects Planning web site.</td>
<td></td>
</tr>
<tr>
<td>2. Install and configure a local BusinessObjects Planning web site.</td>
<td></td>
</tr>
<tr>
<td>4. Configure Internet Information Services (IIS) authentication.</td>
<td>“Configuring Internet Information Services (IIS) authentication” on page 183</td>
</tr>
</tbody>
</table>
Installing BusinessObjects Planning client application

<table>
<thead>
<tr>
<th>Step 1 - Install BusinessObjects Planning client application</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. .Net 2.0 framework must be present on the machine.</td>
<td>“Installing BusinessObjects Planning client applications” on page 143</td>
</tr>
<tr>
<td>2. Install BusinessObjects Planning client.</td>
<td></td>
</tr>
</tbody>
</table>
### Installing BusinessObjects Planning Excel Analyst

<table>
<thead>
<tr>
<th>Step 1 - Install BusinessObjects Planning Excel Analyst</th>
<th>For more information, see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>This stand alone installation installs Excel XLA, SOAP toolkit and the multi-language help files.</td>
<td></td>
</tr>
<tr>
<td><strong>Tip:</strong> You must first have installed Microsoft Office before proceeding to the installation of BusinessObjects Planning Excel Analyst.</td>
<td></td>
</tr>
</tbody>
</table>
## Testing the application installation

<table>
<thead>
<tr>
<th>Step 1 - Test BusinessObjects Planning Excel Analyst</th>
<th>For more information, see...</th>
</tr>
</thead>
</table>
Chapter 3

Installation Prerequisites
Overview

• “Installing BusinessObjects Planning Server prerequisites” on page 31
• “Installing the BusinessObjects Planning Web site and Gateway prerequisites” on page 31
• “Installing BusinessObjects Planning Scheduler prerequisites” on page 32
• “Installing BusinessObjects Planning Web Redirector prerequisites” on page 32
Installing BusinessObjects Planning Server prerequisites

Before running the BusinessObjects Planning Server setup, you should:

• Install and configure a BusinessObjects Planning Site.
  For information on installing and configuring a BusinessObjects Planning Site, “Installing sites” on page 33.

• Set up one or more domain user accounts for BusinessObjects Planning Server, BusinessObjects Planning Scheduler, and BusinessObjects Planning Server Monitor usage. By default, BusinessObjects Planning Server, BusinessObjects Planning Scheduler, and BusinessObjects Planning Server Monitor use the same user account. Any created account must have local administrator or power user rights and privileges and this account must have access to the BusinessObjects Planning site shared folder.

• Install and configure a TCP/IP protocol

Installing the BusinessObjects Planning Web site and Gateway prerequisites

Before running the BusinessObjects Planning Gateway and Web applications setup, you should:

• Install a BusinessObjects Planning Site
  For information on installing a BusinessObjects Planning Site, “Installing sites” on page 33.

• Install BusinessObjects Planning Server

• Install BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro
  For information on installing BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro, “Installing workstation applications” on page 141.

BusinessObjects Planning Web application users access BusinessObjects Planning reports through their Favorites folder, which is set up in BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro. To ensure that Web application users have full
access to BusinessObjects Planning reports, do the following in BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro:

- Set up the appropriate users and groups
- Assign the appropriate rights to groups or individual users
- Create a Favorites folder for each group or user, and add the reports to these folders. (For more information on setting up users and groups, assigning rights, and creating Favorites, see the Administrator’s Guide.)

Installing BusinessObjects Planning Scheduler prerequisites

Before running the BusinessObjects Planning Scheduler setup, you should:

- Install and configure a BusinessObjects Planning Site
  For information on installing and configuring a BusinessObjects Planning Site, "Installing sites" on page 33.
- Set up a domain use account for BusinessObjects Planning Scheduler usage. This account cannot be a Local System account; the service account must be a valid Windows domain account that has access rights to the BusinessObjects Planning site shared folder.

Installing BusinessObjects Planning Web Redirector prerequisites

Before running the BusinessObjects Planning Web Redirector setup, you should:

- Know the URL of the central BusinessObjects Planning Web site.
  For information on installing and configuring a BusinessObjects Planning Web site, “Installing the BusinessObjects Planning Web site and Gateway” on page 100.

Warning: The versions of the BusinessObjects Planning Web sites at both the local and central sites must always be the same. If one is updated, the other also must be updated.
Installing sites
Overview

- “Installing a site on an SQL Server Database” on page 35
- “Installing a site on an Oracle database” on page 50
- “Configuring a BusinessObjects Planning site” on page 65
- “Modifying site configuration” on page 67
- “Backing up, restoring and migrating sites” on page 72
- “Using the LoadValues utility” on page 83
- “ODBC data sources, drivers and connection string parameters” on page 84
Installing a site on an SQL Server Database

This section provides instructions on installing a BusinessObjects Planning site on an SQL Server database. For information on hardware and software requirements, see the Architecture Guide.

When installing a site on an SQL Server database, keep in mind the following requirements:

- You must have administrative rights on the selected database.
- You must have administrative rights to set up new software and new users.
- You should use Mix Mode authentication when installing SQL server.
- You should assign a user to act as the Core user. This user will be the administrative owner of the BusinessObjects Planning site. For more information on the Core user, see "Appendix C: System-Generated Users and Groups" in the Administrator’s Guide.
- The successful installation of a BusinessObjects Planning site requires an SQL Server database that uses case-insensitive collation. During the installation process, if BusinessObjects Planning detects that your database uses case-sensitive collation or binary collation, it will alter your database to use case-insensitive collation (Latin1_General_CI_AS).

Note: This installation process may involve overwriting registry settings. Verify that registry settings can be overwritten before beginning the installation.

To install a BusinessObjects Planning site:

1. From the designated file server, expand the Site folder on the BusinessObjects Planning installation CD.

2. Run SiteAssistant.exe.
   
   Note: If you encounter problems running the Site Assistant, you can run the file vcredist_x86.exe found in the Redistribute directory on your installation CD.

3. In the Site Assistant welcome dialog box, click Next.
4. In the Site Assistant options dialog box, select **Create and configure a new site**.

5. Click **Next**.
6. In the Site creation settings dialog box, in the Site name text box, type a name for the site.

7. In the Enterprise name text box, type a name for the enterprise.

8. In the Enterprise ID text box, type the number of your enterprise. (Your BusinessObjects Planning support representative provides you with this number, which must be the same for all sites that are installed in your enterprise.)

9. Click Next.
10. In the Database type selection dialog box, select SQL Server.

11. Click Next.
12. In the Site database settings dialog box, in the Database server text box, type the name of the computer on which your database server is installed.

13. In the Database text box, type the name of the database.

14. Select the Create this database check box.

    Note: You can also create the database tables by running the Planning.SQL file in SQL analyzer. In this case you must not check the Create this database check box.

15. Click Next.

16. In the SQL Server data file location dialog box, in the Location text box, type the path to where you want to store the database files, or click Browse to search for a location.
Installing sites
Installing a site on an SQL Server Database

**Note:** The database files can be stored in any location, but the specified folder must exist on the database server. If the folder does not exist, the installer will exit.

17. In the **User** text box, type the name of a database account that has administrative rights to the database server.

18. In the **Password** text box, type the account’s password.

19. In the **Confirm password** text box, retype the account’s password.

20. Select the **Use the same credentials to create the database objects** check box to use the same database account for the rest of the database-related actions during the installation. Click **Next**. Go to step 21.

OR
Click **Next**. In the Database objects creation dialog box, type the name and password of a database account that has administrative rights to the database server.

Click **Next**.
21. In the Database connection settings dialog box, in the Datasource text box, type a name for the data source. This name is used to identify the ODBC data source on machines where BusinessObjects Planning applications are installed.

22. In the User name text box, type the name for the account that will own the BusinessObjects Planning database and manage its data. Do not use the database administrator account name, as best practice is to keep a dedicated account available for BusinessObjects Planning usage. Record the name of the new account and its password for future reference.

23. In the Password text box, create a password for the account you specified in the User name text box.

24. In the Confirm password text box, retype the password.

25. Make sure the Create this account check box is selected.

26. Select the Use previously entered database credentials check box to use the previously entered database administrative account for the creation of this user. Click Next. Go to step 27.

OR
Click **Next**. In the Database account creation dialog box, type the name and password of a database account that has administrative rights to the database server.

![Database account creation dialog box]

Click **Next**.

**27.** In the Shared folder location dialog box, type the path to where you want to save the BusinessObjects Planning site shared files, or click **Browse** to specify a location.
Installing a site on an SQL Server Database

Note: The setup program will create the folder if the folder does not exist.

28. Click Next.

29. In the Core user setup dialog box, in the User name text box, type the name of your Core user.
Note: This user must be an existing user in the domain. This user is the administrative user for all BusinessObjects Planning client applications. It is recommended that a dedicated Windows account be created and used for this purpose. For information on the Core user, see Appendix C of the Administrator’s Guide.

30. In the Domain name text box, specify the network domain to which the Core user belongs.

31. Click Next.
32. In the Site ODBC data source definition dialog box, under ODBC drivers with predefined data sources, click **Add**.

33. In the Add an ODBC driver dialog box, select **Use one of the drivers installed on this machine**, and select the appropriate SQL Server driver from the list.

OR

Select **Use a driver other than the ones installed on this machine**, and type the specific name of a driver in the driver text box.

34. Click **OK**.

35. Select the driver you have just added.

36. If you want to specify the parameters for the driver using a registered template, click **Load Parameter Names Template**. In the Load Parameters From a Template dialog box, select the driver template that matches your current driver and click **OK**.

OR

If you want to specify the parameters for the driver using a previously-saved INI file, click **Load Predefined Parameter Names and Values**. In the Load Parameters From a File dialog box, select the file that contains the configuration information for your current driver and click **OK**.
37. In the Parameters for the selected driver list, select a parameter and click **Modify**.

38. In the Modify a Parameter dialog box, in the Parameter value text box, type the value for the selected parameter.

39. Click **OK**.

40. Repeat steps 37-39 for all the parameters.

   **Note:** You can add additional parameters manually by clicking **Add** and then typing the parameter’s name and value in the Add a Parameter dialog box.

41. Click **Next**.
42. In the INI settings dialog box, select each ini setting in the Select an INI setting list and verify that the setting is suitable for your installation. To change a setting, type the value in the Specify a value for the selected INI setting text box.

43. Click Next.

44. In the Languages dialog box, select the check boxes of the application and working languages that you want to activate for your site. To select working languages that are not displayed in the current dialog box, click More languages, and in the Working Languages dialog box, select the
check boxes of the desired languages and click **OK**. You can also select the default site language, default application language, and default working language.

**Site Assistant**

![Site Assistant](Image)

45. Select **Update the database schema with the necessary modifications** to automatically update the site’s database schema to support the selected language settings, and click **Next**.

OR

Select **Generate SQL script; I will run the script manually** to create a SQL script that will update the database schema to support the selected language settings, and click **Next**. If you choose this option, you must save the SQL script file and run the script on the site’s database before continuing with the site installation. If you are unable to run the script on the database during the site installation, you must cancel the installation, run the script on the site’s database, launch the installation again, select the same options that you set in the Languages dialog box when you created the SQL script, select **The database schema has already been updated**, and click **Next**.
46. In the Site installation settings dialog box, review the settings for your installation. If you want to change any of the settings, click Back to return to any of the previous screens.

![Site Assistant Settings Dialog]

47. Click Process.

48. In the Site Assistant log file dialog box, review the log of the installation and click Done.

49. Click Finish.

Installing a site on an Oracle database

This section provides instructions on installing a BusinessObjects Planning site on an Oracle database. For information on hardware and software requirements, see the Architecture Guide.

Installing a BusinessObjects Planning site on an Oracle database involves two steps, which must be done in the following order:

1. Create the database tables. For more information, “Creating the database tables” on page 51.
2. If you are installing a BusinessObjects Planning site on an Oracle 10g database, optimize the database to increase BusinessObjects Planning performance. For more information, "Optimizing an Oracle 10g database" on page 53.

3. Run the BusinessObjects Planning Site Setup program. For more information, "Running the BusinessObjects Planning Site Setup program" on page 54.

Failure to follow the steps in the listed order will result in a failed installation.

Creating the database tables

The installer cannot create Oracle database tables during the installation process. Therefore, the tables must be created manually by running database scripts before you can install a BusinessObjects Planning site.

Before running the scripts and creating the database tables, a database administrator must have already performed the following tasks:

- Created a database to contain the BusinessObjects Planning data
- Created a BusinessObjects Planning application account
- Configured the database according to any in-house policies

Warning: Do not attempt to create the database tables until these tasks have been completed.

Keep in mind the following points about the database scripts and tables for Oracle:

- The recommended characters sets are AL32UTF8 for the database character set and AL16UTF16 for the national character set.
- The scripts assume that the database objects will be created for the currently logged on database user. If this assumption is not valid, the DBA will have to make the appropriate modifications to the scripts.
- If the owner of the database objects is different from the account that will be used as the BusinessObjects Planning application account, the DBA will have to ensure that the objects are accessible for the application account without explicitly specified ownership. For example, BusinessObjects Planning applications execute SQL statements such as the following, where the referenced database objects are specified with implicit ownership:

```sql
SELECT LID,FID FROM SCENARIOATTRIBUTESWTEMPLATES WHERE UPPER(IDENTIFIER) = UPPER('2000AM');
SELECT NAME,IDENTIFIER FROM GOIDFILEDATA WHERE FID=100 AND LID=2000;
```
If the installation and upgrade scripts are to be edited with the purpose of adding the owner to the object names, keep in mind the following:

- The scripts create and/or update database tables and indexes.
- The scripts create and/or update triggers on some tables.
- The scripts create a few sequences that are used by the triggers.
- The scripts create and/or update some views.
- The scripts create and/or update a number of functions and procedures.
- The scripts create and/or update a Java source used by one of the functions.

One of the functions is CtpGetOwner, which returns the name of the database schema owner. By default, this function returns the name of the currently logged on user. The return value is used by the rest of the functions and procedures for the purpose of constructing dynamic SQL statements. If the real owner is different from the currently logged on user, the DBA will have to modify CtpGetOwner to make it return the name of the real database schema owner. The functions and procedures assume that all names are located within the same schema.

**Note:** These functions and procedures are used by the installation and upgrade scripts only. They are never called from within BusinessObjects Planning applications.

- The installation and upgrade scripts also contain plain SQL statements, such as CREATE TABLE NLS_LANGUAGES, CREATE INDEX ON TABLE, and CREATE FUNCTION. These statements do not specify the explicit owner.
- Two stored procedures, CtpChangeLanguage and CtpFixLanguage, are used every time a BusinessObjects Planning site administrator uses Site Assistant to make changes to the site configuration. Site Assistant generates a SQL script that should be manually executed when the national language support is re-configured.

**Note:** Site Assistant only generates such scripts; it does not execute them. These scripts must be reviewed by a DBA and executed manually.

### To create the database tables:

1. Expand the **Site**, **DatabaseScripts**, and **Install** folders on the BusinessObjects Planning installation CD.
2. Open the PlanningOracle.sql file. This file contains the SQL scripts needed to create the BusinessObjects Planning tables.
3. Using either a command line or a GUI, run the scripts in this file to create the BusinessObjects Planning tables in Oracle.
Optimizing an Oracle 10g database

If you are running a BusinessObjects Planning site on an Oracle 10g database, you can optimize the database to increase BusinessObjects Planning performance. Optimization consists of modifying particular indexes in the ScenarioData tables of the database.

By default, indexes in the ScenarioData tables are created with 15 columns, as outlined below:

```
CREATE INDEX DataYY{A|F|P}{D|M|Q|H|Y}1SK2 ON ScenarioDataYY{A|F|P}{D|M|Q|H|Y}1
  (SCENARIO_LID,
   SCENARIO_FID,
   ACCOUNT_LID,
   ACCOUNT_FID,
   CURRENCY_LID,
   CURRENCY_FID,
   BALTYPE_LID,
   BALTYPE_FID,
   CHANNEL_LID,
   CUSTOMER_LID,
   PRODUCT_LID,
   PRODUCT_FID,
   PROJECT_LID,
   TRANSACTION_LID,
   POST_LID);
```

To optimize an Oracle 10g database:

1. Drop all DataYY{A|F|P}{D|M|Q|H|Y}1SK2 indexes in all ScenarioDataYY{A|F|P}{D|M|Q|H|Y}1 tables.

2. Recreate the indexes in the following manner:

```
CREATE INDEX DataYY{A|F|P}{D|M|Q|H|Y}1SK2 ON ScenarioDataYY{A|F|P}{D|M|Q|H|Y}1
  (SCENARIO_LID,
   SCENARIO_FID,
   ACCOUNT_LID,
   ACCOUNT_FID,
   CURRENCY_LID,
   CURRENCY_FID,
   BALTYPE_LID,
   BALTYPE_FID,
   CHANNEL_LID,
   CUSTOMER_LID,
   PRODUCT_LID,
   PRODUCT_FID,
   PROJECT_LID,
   TRANSACTION_LID,
   POST_LID);
```
Installing a site on an Oracle database

```sql
SCENARIO_FID,
ACCOUNT_LID,
CUSTOMER_LID,
PRODUCT_LID,
CURRENCY_LID,
BALTYPE_LID
);
```

**Note:** If your site’s business models contain dimensions other than Unit, Line, Customer, Product, Currency, and Balance Type that store large amounts of data (for example, Channel), you should add a LID column (for example, CHANNEL_LID) for those dimensions during the index recreation.

### Running the BusinessObjects Planning Site Setup program

After creating the database tables, the next step is to run the BusinessObjects Planning Site Setup program.

When installing a site on an Oracle database, keep in mind the following requirements:

- You must have administrative rights on the selected database.
- You must have administrative rights to set up new software and new users.
- You must establish a connection between the Oracle client and the Oracle service using a Service ID (SID) or Service Name. The SID or Service Name identifies the location of the server on the network. Both names may be found either locally in the TNSNames.ora file or in a centralized location on the name server, depending on your configuration.
- If your file server is not the same machine as your Oracle server, the file server must be running an Oracle client. It is recommended that you run the same version of the Oracle client as the version on the database server.
- You should assign a user to act as the Core user. This user will be the administrative owner of the BusinessObjects Planning site. For more information on the Core user, see “Appendix C: System-Generated Users and Groups” in the *Administrator’s Guide*. 

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4 Installing sites

**Installing a site on an Oracle database**

- SCENARIO_FID,
- ACCOUNT_LID,
- CUSTOMER_LID,
- PRODUCT_LID,
- CURRENCY_LID,
- BALTYPE_LID

);

**Note:** If your site’s business models contain dimensions other than Unit, Line, Customer, Product, Currency, and Balance Type that store large amounts of data (for example, Channel), you should add a LID column (for example, CHANNEL_LID) for those dimensions during the index recreation.

### Running the BusinessObjects Planning Site Setup program

After creating the database tables, the next step is to run the BusinessObjects Planning Site Setup program.

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- You must have administrative rights on the selected database.
- You must have administrative rights to set up new software and new users.
- You must establish a connection between the Oracle client and the Oracle service using a Service ID (SID) or Service Name. The SID or Service Name identifies the location of the server on the network. Both names may be found either locally in the TNSNames.ora file or in a centralized location on the name server, depending on your configuration.
- If your file server is not the same machine as your Oracle server, the file server must be running an Oracle client. It is recommended that you run the same version of the Oracle client as the version on the database server.
- You should assign a user to act as the Core user. This user will be the administrative owner of the BusinessObjects Planning site. For more information on the Core user, see “Appendix C: System-Generated Users and Groups” in the *Administrator’s Guide*. 

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Note: This installation process may involve overwriting registry settings. Verify that registry settings can be overwritten before beginning the installation.

➢ To install a BusinessObjects Planning site:
1. From the designated file server, expand the Site folder on the BusinessObjects Planning installation CD.
2. Run SiteAssistant.exe.
   Note: If you encounter problems running the Site Assistant, you can run the file vcredist_x86.exe found in the Redistribute directory on your installation CD.
3. In the Site Assistant welcome dialog box, click Next.
4. In the Site Assistant options dialog box, select Create and configure a new site.
5. Click Next.
6. In the Site creation settings dialog box, in the Site name text box, type a name for the site.

7. In the Enterprise name text box, type a name for the enterprise.

8. In the Enterprise ID text box type the number of your enterprise. (Your BusinessObjects Planning support representative provides you with this number, which must be the same for all sites that are installed in your enterprise.)

9. Click Next.
10. In the Database type selection dialog box, select **Oracle**.

11. Click **Next**.
12. In the Database connection settings dialog box, in the Datasource text box, type a name for the data source. This name is used to identify the ODBC data source on machines where BusinessObjects Planning applications are installed. All BusinessObjects Planning applications will use a data source with this name to access the database server.

13. In the User name text box, type the name of the login account that is used for the data source you specified in the Datasource text box. All BusinessObjects Planning applications will use the data source with this account to access the database server.

14. In the Password text box, type the password for the account you specified in the User name text box.

15. In the Confirm password text box, retype the password.

16. Click Next.

17. In the Shared folder location dialog box, type the path to where you want to save the BusinessObjects Planning site shared files, or click Browse to specify a location.
Note: The setup program will create the folder if the folder does not exist.

18. Click **Next**.

19. In the Core user setup dialog box, in the User name text box, type the name of your Core user.
Note: This user must be an existing user in the domain. This user is the administrative user for all BusinessObjects Planning client applications. It is recommended that a dedicated Windows account be created and used for this purpose. For information on the Core user, see Appendix C of the Administrator’s Guide.

20. In the Domain name text box, specify the network domain to which the Core user belongs.

21. Click Next.
22. In the Site ODBC data source definition dialog box, under ODBC drivers with predefined data sources, click Add.

23. In the Select an ODBC driver dialog box, select **Use one of the drivers installed on this machine**, and select the appropriate Oracle driver from the list.

   OR

   Select **Use a driver other than the ones installed on this machine**, and type the name of a driver in the driver text box. You may want to use this option if the ODBC driver of choice has different names on client workstations, which is often the case with Oracle ODBC drivers. In this case, you should use a name that is generic enough to represent all possible Oracle drivers (for example, Oracle 9i/10g ODBC Driver).

   **Tip:** To make the configuration of the ODBC data source easier, you may want to ensure that the ODBC driver has the same name on all workstations (by configuring the workstations from a central point, for example). If you do this, you should use a driver name that is present in the list of drivers installed on your machine. For more information on ODBC data sources and drivers, “ODBC data sources, drivers and connection string parameters” on page 84.

24. Click OK.
25. Select the driver you have just added.

26. If you want to specify the parameters for the driver using a registered template, click **Load Parameter Name Template**. In the Load Parameters From a Template dialog box, select the driver template that matches your current driver and click **OK**.

OR

If you want to specify the parameters for the driver using a previously-saved INI file, click **Load Predefined Parameter Names and Values**. In the Load Parameters From a File dialog box, select the file that contains the configuration information for your current driver and click **OK**.

**Note:** The parameters that you specify in this step are ODBC connection string parameters and are specific to each ODBC driver. The templates that accompany Site Assistant include the minimum required parameters only, such as the location of the database server. For a list of ODBC connection string parameters for the most commonly used drivers, "ODBC data sources, drivers and connection string parameters" on page 84. For a full list of valid parameters specific to your ODBC driver, refer to your ODBC driver documentation.

27. In the Parameters for the selected driver list, select a parameter and click **Modify**.

28. In the Modify a Parameter dialog box, in the Parameter value text box, type the value for the selected parameter.

29. Click **OK**.

30. Repeat steps 27-29 for all the parameters.

**Note:** You can add additional parameters manually by clicking **Add** and typing in the parameter’s name and value in the Add a Parameter dialog box.
31. Click Next.

32. In the INI settings dialog box, select each ini setting in the Select an INI setting list and verify that the setting is suitable for your installation. To change a setting, type the value in the Specify a value for the selected INI setting text box.

33. Click Next.

34. In the Languages dialog box, select the check boxes of the application and working languages that you want to activate for your site. To select working languages that are not displayed in the current dialog box, click More languages, and in the Working Languages dialog box, select the
check boxes of the desired languages and click OK. You can also select the default site language, default application language, and default working language.

35. If you enabled English only as the application and working language of your site, select **The database schema has already been updated** and click **Next**.

OR

If you enabled languages other than English as application and working languages of your site, select **Generate SQL script; I will run the script manually** to create a SQL script that will update the database schema to support the selected language settings, and click **Next**. After you click Next, you must save the SQL script file and run the script on the site’s database before continuing with the site installation.

If you are unable to run the script on the database during the site installation, you should deselect all application and working languages other than English, select **The database schema has already been updated**, click **Next**, and complete the site installation. After completing the site installation, you can run the script on the site’s database, launch
Site Assistant again, select the same options that you set in the Languages dialog box when you created the SQL script, select The database schema has already been updated, and click Next.

36. In the Site installation settings dialog box, review the settings for your installation. If you want to change any of the settings, click Back to return to any of the previous screens.

37. Click Process.

38. In the Site Assistant log file dialog box, review the log of the installation and click Done.

39. Click Finish.

Configuring a BusinessObjects Planning site

This section provides the instructions that you need to follow after successful installation of a BusinessObjects Planning site.

This section provides information on the following topics:

- “Configuring shared folder access” on page 66
- “Installing other BusinessObjects Planning products” on page 66
Configuring shared folder access

The BusinessObjects Planning shared folder contains shared files for BusinessObjects Planning objects such as business models, scripts, reports, and templates. You must perform the following actions on the shared folder:

1. Share the folder so that it is visible to all users on the network.
2. Assign rights and permissions to users or user groups to the various sub-folders in the BusinessObjects Planning shared folder

For information on configuring shared folder access, refer to the Configuring Security guide.

Installing other BusinessObjects Planning products

This section describes what to do next after installing and configuring a BusinessObjects Planning site. The following topics are discussed:

• Recommended product installation
• Optional product installation

Recommended product installation

Once you have installed a BusinessObjects Planning site, it is recommended that you install BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro on a client machine. BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro are used to provide administrative access to a BusinessObjects Planning site and for the creation of business models, scenarios, and other important components. BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro are also used to enrol users in BusinessObjects Planning, define BusinessObjects Planning roles and BusinessObjects Planning groups, and to perform other site administration tasks.

For information on installing BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro, “Installing workstation applications” on page 141.

Optional product installation

Once you have created a business model and defined users, you should install the following products, depending on the type of site configuration that your organization is using:
Local configuration
BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro on client workstations.

Intranet configuration
• BusinessObjects Planning Application Server on a dedicated server
• BusinessObjects Planning Gateway either on a dedicated server or with a Web server (depending on the expected number of users)
• BusinessObjects Planning Analyst on a Web server
• BusinessObjects Planning Excel Analyst on client machines
  For instructions on installing the BusinessObjects Planning Excel Analyst “Installing workstation applications” on page 141.
  For instructions on installing BusinessObjects Planning Application Server, BusinessObjects Planning Gateway, and BusinessObjects Planning Analyst “Installing Web applications and servers” on page 91.

Global configuration
• Individual Local or intranet configurations for each site

Modifying site configuration
This section provides the instructions that you need to change the configuration of a BusinessObjects Planning site.
This section provides information on the following topics:
• “Modifying site configuration” on page 67

Modifying site configuration
This section provides information on modifying the configuration of a BusinessObjects Planning site.

To modify site configuration:
1. Expand the Site folder on the installation folder and run SiteAssistant.exe.
   Note: If you encounter problems running the Site Assistant, you can run the file vcredist_x86.exe found in the Redistribute directory on your installation CD.
2. In the Site Assistant welcome dialog box, click Next.
3. In the Site Assistant options dialog box, select **Reconfigure an existing site**.

4. Click **Next**.
5. In the Shared folder location dialog box, type the path to the BusinessObjects Planning Site shared folder, or click Browse to specify the location.

6. Click Next.
7. In the Site ODBC data source definition dialog box, view the ODBC drivers in the ODBC drivers with predefined data sources list.

8. To add a driver configuration to the site, click Add and follow the procedure for adding a driver configuration. (For information on adding a driver, “Installing a site on an SQL Server Database” on page 35, or “Installing a site on an Oracle database” on page 50.)

9. To remove a driver configuration from the site, select the driver and click Delete.

10. To modify a driver configuration, select the driver to modify. In the Parameters for the selected driver list, select a parameter and click Modify. Type the parameter’s new value and click OK. Repeat this step for all the parameters you want to modify.

   Note: You can add additional parameters manually by clicking Add and typing in the parameter’s name and value in the Add a Parameter dialog box.

11. Click Next.
12. In the INI settings dialog box, select each ini setting in the Select an INI setting list and verify that the setting is suitable for your installation. To change a value, type the value in the Specify a value for the selected INI setting text box.

13. Click **Next**.
14. In the Site installation settings dialog box, review the settings for your installation. If you want to change any of the settings, click **Back** to return to any of the previous screens.

15. Click **Process**.

16. Click **OK**.

17. In the Site Assistant log file dialog box, review the log of the installation and click **Done**.

18. Click **Finish**.

### Backing up, restoring and migrating sites

This section provides an overview of backing up, restoring, and migrating BusinessObjects Planning sites. Specifically, this section discusses:

- “Backing up the BusinessObjects Planning shared folder” on page 73
- “Restoring the BusinessObjects Planning shared folder” on page 73
- “Backing up an SQL database” on page 74
- “Restoring a database” on page 76
- “Migrating a site” on page 79
Backing up the BusinessObjects Planning shared folder

The BusinessObjects Planning shared folder stores all publicly-owned models, scenarios, reports, scripts, configuration information, and log files. This information should be backed up regularly for security purposes. This backup copy can also be used to transfer a full site to another location.

**Note:** The database and the shared folder should be backed up at the same time. Failure to do so can result in data being out of sync when the database and shared folder are restored.

When backing up the shared folder:

- Copy the entire shared folder, not just selected subfolders or files
- When backing up the shared folder to a CD, the preferred method is to archive the shared folder to a .zip file and then copy the .zip file to a CD. If the shared folder is copied to CD without archiving, then all the files that are stored on the CD become read-only when restored and their properties must be changed in order for the files to become writable.

**To back up the BusinessObjects Planning shared folder:**

1. In Windows Explorer, select the BusinessObjects Planning shared folder (or the .zip file that contains a copy of the BusinessObjects Planning shared folder).
2. Copy the BusinessObjects Planning shared folder to the destination drive or media. The backup location should be on removable media such as a CD or on a machine that is separate from the machine that hosts the shared folder.

Restoring the BusinessObjects Planning shared folder

You can use a restored copy of the BusinessObjects Planning shared folder to replace a corrupted shared folder or to create a duplicate site for testing or other purposes.

**To restore the BusinessObjects Planning shared folder:**

1. Copy the complete contents of the BusinessObjects Planning shared folder from the backup location. (If the backup has been saved as a .zip file, first extract the files from the .zip file to a temporary location, and then copy them.)
2. Paste the backup files over the destination files.
Warning: After restoring the BusinessObjects Planning shared folder, clear out the Private/Model folder on all machines that are running BusinessObjects Planning client applications against this share. This ensures that any private model information that might be out of sync with the restored version does not corrupt any model files.

Backing up an SQL database

The BusinessObjects Planning data repository stores configuration information, user and group information, and scenario data. The BusinessObjects Planning data repository should be backed up regularly for security purposes. This backup copy can also be used to make a duplicate of a site. For information on backing up an Oracle database, refer to Oracle documentation.

Note: The database and the shared folder should be backed up at the same time. Failure to do so can result in data being out of sync when the database and shared folder are restored.

To back up the BusinessObjects Planning data repository on a SQL database:

1. Open SQL Enterprise Manager.
2. Right-click the BusinessObjects Planning database and select All Tasks and Backup Database.
3. In the SQL Server Backup window, select **Database - complete**.

4. Click **Add**.

5. In the File name box, type the destination file for the backup and click **OK**.

6. Click the **Options** tab.
7. On the Options page, select **Check media set name and backup set expiration**.

8. Click **OK**. The backup is created.

9. In the SQL Server Enterprise Manager dialog box click **OK**.

**Restoring a database**

You can use a restored copy of the BusinessObjects Planning data repository to overwrite a corrupt database with saved data, or to overwrite a newly-created database to create a duplicate of a site. For information on restoring an Oracle database, refer to Oracle documentation.

**Note:** All connections to the database must be closed before attempting to restore data. If BusinessObjects Planning Server or BusinessObjects Planning Scheduler is running and using the database, then they must be shut down.

► **To restore the BusinessObjects Planning data repository on a SQL database:**

1. Open SQL Enterprise Manager.

2. Right-click the target database and select **All Tasks** and **Restore Database**.
3. Select From device and click Select Devices.

4. Click Add.
5. In the Choose Restore Destination dialog box, type the name of the saved backup file in the File name box.

6. Click **OK** twice to exit out of this sequence.

7. Click the **Options** tab.

8. On the Options page, in the Move to physical file name list, type the correct paths and file names for the target database's data and log files.

9. Make sure **Force restore over existing database** is selected.

10. Click **OK**.
Migrating a site

When migrating a site, such as from a development site to a production site, the following steps must be followed to minimize any chance of a BusinessObjects Planning user gaining access to the incorrect site.

1. Install a new site.
2. Restore the backups of the BusinessObjects Planning database and shared folder.
3. Modify the second site’s database.
4. Create new connections to the second site.
5. Change the name of the second site in BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro.

Installing a new site

The first step in migrating is to install a new site. For information on installing a site, “Installing a site on an SQL Server Database” on page 35. When creating a new site for migration purposes:

- Make sure that the version of the site that you are installing is the same version as the site that was backed up
- Install the shared folder in a separate location from any other site shared folders
- Use a name for the database that is distinctly different from any other site databases
- Use an Enterprise ID that is different from the numbers used for any other sites. A site’s Enterprise ID is a master identifier that identifies the group that a site belongs to. An enterprise can have numerous sites in it, with each site having their own site ID. When creating a duplicate of a site, you should always use a separate Enterprise ID for the duplicate site to ensure that the duplicate site does not get confused with the original site.

Restoring the BusinessObjects Planning database and shared folder

After installing a new site, continue the migration process by restoring the backup database and shared folder to the newly-created database and shared folder. For information on restoring a database, “Restoring a database” on page 76 and for information on restoring a shared folder, “Restoring the BusinessObjects Planning shared folder” on page 73.

When restoring the shared folder:

- Do not copy the backup copies of the log files if you do not want the new site to have a history of all errors that have occurred on the original site.
• Do not copy the backup copy of the Planning.ini file to the new site

Modifying the database

When migrating a site, the data in the new site must be modified or removed so that the new site does not have the old site’s information. The following changes must occur in the new database:
• Delete legacy data
• Change the Enterprise ID
• Change the database owner
• Change the Core user

Deleting legacy data

Legacy data from the old site must be removed from the database of the new site. Failure to remove legacy data will result in errors.

▲ To remove legacy data from the new database:
1. Open SQL Enterprise Manager.
2. Select the new database.
3. From the Tools menu, select SQL Query Analyzer.
4. In the Query window type the following query statements:
   delete from Applications  
   delete from Servers  
   delete from Job_Log  
   delete from Job_Queue  
   delete from GoidLinks
5. Run the query.
6. Exit SQL Query Analyzer.

Changing the Enterprise ID

You must change the site’s Enterprise ID in the database so that it matches the Enterprise ID of the newly-installed site.

▲ To update the Enterprise ID in the database:
1. Open SQL Enterprise Manager.
2. Select the new database.
3. From the Tools menu, select SQL Query Analyzer.
4. In the Query window type the following query statement:
   update currentsite set enterprise_id = <new_id>
Installing sites

Backing up, restoring and migrating sites

4

5. Run the query.
6. Exit SQL Query Analyzer.

Changing the database owner
You must change the database owner of the new site database to the owner that was created during the installation of the new site.

To change the database owner:
1. Open SQL Enterprise Manager.
2. Select the new database.
3. From the Tools menu, select SQL Query Analyzer.
4. In the Query window type the following query statement:
   sp_changeDBOwner '<db_owner>'
   Note: <db_owner> must be the name of the database owner that was created during the site installation.
5. Run the query.
6. Exit SQL Query Analyzer.

Changing the Core user
You must change the Core user information in the database of the new site to the Core user that was created during the installation of the new site. For information on the Core user, refer to the “System-generated users” section in the Administrator’s Guide.

To change the Core user:
1. Open SQL Enterprise Manager.
2. Select the new database.
3. From the Tools menu, select SQL Query Analyzer.
4. In the Query window type the following query statement:
   update Principals set name='<full name>', identifier='<username>' where lid=1
   update Users set domain_name='<domain>' where lid=1
   Note: <full name> is the full name of the user, <username> is the username of the Core user, and <domain> is the network domain that this user belongs to.
5. Run the query.
6. Exit SQL Query Analyzer.

Creating a new connection

All client machines that use both the old and new sites must have ODBC connections and registry settings that point to both sites. For information on creating a connection to a new site, refer to the Using the Configuration Assistant guide.

Changing the site name in BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro

Once the second site has been properly configured and client applications can successfully gain access to the site, you can optionally change the second site’s name.

► To change the second site’s name:
1. Launch BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro with a user ID that has Core impersonation rights.
2. Expand the Administration, Sites folder and select the site.
3. In the General dialog box, type the new site name in the Name text box.
4. Click Apply. The new site name is reflected in the status bar found at the bottom right hand of the screen.
Using the LoadValues utility

The BusinessObjects Planning LoadValues utility is used to update the BusinessObjects Planning Site database when any changes that affect the database have occurred. LoadValues re-populates database tables related to the following:

- System-defined user rights and privileges
- System-defined groups and hierarchies of system-defined groups
- BusinessObjects Planning object types (for example, scenarios, reports, favorites, and so on) and hierarchies of object types
- BusinessObjects Planning operation codes and names
- Distribution packet types

LoadValues does not delete any existing tables, create any new tables, or delete any records added by users to these tables.

This section provides information about:

- “Changes that require LoadValues to be run” on page 83
- “Running LoadValues” on page 83

Changes that require LoadValues to be run

LoadValues must be run whenever any of the following occur:

- A new site is installed (the site installer invokes LoadValues automatically).
- A site is upgraded to a newer version of BusinessObjects Planning.
- The ServiceAccount parameter in the [Planning] section of the Planning.ini file is changed.
- The AllowSiteAdministratorsToGrantImpersonationRights parameter in the [Impersonation] section of the Planning.ini file is changed.

Running LoadValues

The LoadValues utility is found by expanding the Site and Tools folders on the BusinessObjects Planning installation CD.

To run LoadValues without verifying that you are connecting to the correct site, at a command line, type the following and press ENTER:

```
loadvalues -skipsitecheck
```

OR
To run LoadValues while verifying that you are connecting to the correct site, at a command line, type the following and press **ENTER**:

```
loadValues -EnterpriseId=<EnterpriseID> -SiteNumber=<SiteNumber>
```

Where EnterpriseID is the Enterprise ID for the site, and SiteNumber is the site number for the site.

**ODBC data sources, drivers and connection string parameters**

This section provides technical information on setting up and configuring ODBC data sources and drivers that are used for the proper operation of BusinessObjects Planning.

**About ODBC data sources and drivers**

BusinessObjects Planning applications use ODBC for establishing connections to the database server. The name of the ODBC data source is defined in the [Planning] section of the shared Planning.ini file. For example:

```ini
[Planning]
DataSourceName=CtpPlanning
```

The names of supported ODBC drivers are also defined in the [Planning] section of the shared Planning.ini file. For example:

```ini
[Planning]
ODBCDriverName=Oracle ODBC 10g, Oracle ODBC 9i,
DataDirect 5.0 Oracle Wire Protocol
```

Using Site Assistant, you can automatically create the ordered list of ODBC drivers that are supported on your BusinessObjects Planning site. BusinessObjects Planning applications will use this list of ODBC drivers to automatically create the ODBC data source during application installation. The list of ODBC drivers is ordered by priority; that is, the first ODBC driver on the list that is found installed on the workstation is used for ODBC data source creation. Therefore, you should put the most desirable ODBC drivers in front of the list.

For each ODBC driver on the list, you can define ODBC connection string parameters that are specific to each driver (for information on commonly used ODBC connection string parameters, “**ODBC Connection String Parameters**” on page 86). If one of the listed drivers is found on the target machine, and the driver’s name has the list of predefined parameters associated with it, BusinessObjects Planning configuration programs will be able to create the corresponding ODBC data source automatically.
If you define connection string parameters for one or more ODBC drivers, Site Assistant will create (and BusinessObjects Planning configuration programs will use) a number of sections in the shared Planning.ini file with the following pattern:

\[DSN:{{ODBC data source name},Driver:{{ODBC driver name}}}\]
\{name\}={value}
\{name\}={value}

where \{name\} is a parameter name which is specific for the ODBC driver \{{ODBC driver name}\} and \{value\} is its value. For example, with SQL Server Native Client, one of the valid name-value pairs could be Encrypt=Yes.

For these examples of ODBC data source and driver names, the full set of INI settings might look as follows:

\[Planning\]
\ DataSourceName=CtpPlanning
\ ODBCDriverName=DataDirect 5.0 Oracle Wire Protocol, Oracle ODBC 10g, Oracle ODBC 9i
\[DSN:CtpPlanning,Driver:Oracle ODBC 10g]\n\ DBQ=STB-on-db-ux
\ LOB=T
\[DSN:CtpPlanning,Driver:Oracle ODBC 9i]\n\ DBQ=STB-on-db-ux
\ LOB=T
\ DBA=W
\ APA=T
\[DSN:CtpPlanning,Driver:DataDirect 5.0 Oracle Wire Protocol]\n\ Port=1521
\ Host=db-ux
\ SID=STB

If certain machines, such as the machine used to host the BusinessObjects Planning Application Server, had DataDirect 5.0 ODBC drivers installed on them, the configuration program would automatically select the DataDirect 5.0 ODBC driver for the silent creation of the ODBC data source. On other machines, if Oracle Client 9i or 10g was installed, the configuration program would automatically use Oracle ODBC 9i or Oracle ODBC 10g respectively.

The BusinessObjects Planning Configuration Assistant is the configuration program that takes care of the automatic ODBC data source creation and is installed with every BusinessObjects Planning application that requires a connection to a database server. The Configuration Assistant is silently launched at the end of the installation process for every BusinessObjects Planning application with the purpose of establishing a connection to a BusinessObjects Planning site. The BusinessObjects Planning Configuration Assistant is not installed on users' desktop, but it can be launched from the following installation directory: Planning\Programs\Setup\CtpConfigAsst.exe.
If the Configuration Assistant is unable to find an exact match between any ODBC diver listed in the shared Planning.ini file and the ODBC drivers installed on the local machine, it will display two lists of ODBC drivers: a list of the drivers declared in the Planning.ini file and a list of drivers installed on the machine. If the user can select a driver from each list to create a reasonably matching pair, the Configuration Assistant will proceed with the creation of the data source. For example, the Planning.ini file may refer to Oracle ODBC 10g, but the name of the actual ODBC driver installed on the machine is Oracle in OraHome10g. Since these two driver names essentially refer to the same ODBC driver, they can make a matching pair.

If the user cannot find a reasonable match, the best choice would be to select the **Launch ODBC Administrator and configure the data source manually** option in the Configuration Assistant. This option will launch Microsoft ODBC Administrator.

### ODBC Connection String Parameters

The following tables contain OBDC connection string parameters for the most commonly used SQL and Oracle ODBC drivers. You can use these parameters to configure the ODBC driver specified for your site using Site Assistant.

ODBC connection string parameters are specific to each ODBC driver. This appendix lists the parameters for the most commonly used ODBC drivers only. For a full list of valid parameters specific to your ODBC driver, refer to your ODBC driver documentation.

#### SQL Native Client ODBC Driver (SQL Server 2005)

The following table lists OBDC connection string parameters and their descriptions for SQL Native Client ODBC Driver (SQL Server 2005).

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>The network address of the server running an instance of SQL Server.</td>
</tr>
<tr>
<td>AnsINPW</td>
<td>When &quot;yes&quot;, the driver uses ANSI-defined behaviors for handling NULL comparisons, character data padding, warnings, and NULL concatenation. When &quot;no&quot;, ANSI defined behaviors are not exposed.</td>
</tr>
<tr>
<td>AutoTranslate</td>
<td>When &quot;yes,&quot; ANSI character strings sent between the client and server are translated by converting through Unicode to minimize problems in matching extended characters between the code pages on the client and the server. When &quot;no,&quot; character translation is not performed.</td>
</tr>
</tbody>
</table>
ODBC data sources, drivers and connection string parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database</td>
<td>Name of the default SQL Server database for the connection. If this parameter is not specified, the default database defined for the login is used. The default database from the ODBC data source overrides the default database defined for the login.</td>
</tr>
<tr>
<td>Driver</td>
<td>Name of the driver as returned by SQLDrivers. The keyword value for the SQL Native Client ODBC driver is &quot;{SQL Native Client}&quot;.</td>
</tr>
<tr>
<td>Encrypt</td>
<td>Specifies whether data should be encrypted before sending it over the network. Possible values are &quot;yes&quot; and &quot;no&quot;. The default value is &quot;no&quot;.</td>
</tr>
<tr>
<td>Failover_Partner</td>
<td>Name of the failover partner server to be used if a connection cannot be made to the primary server.</td>
</tr>
<tr>
<td>Language</td>
<td>SQL Server language name (optional). If connecting to a SQL Server with multiple languages, Language specifies which set of messages are used for the connection.</td>
</tr>
<tr>
<td>MARS_Connection</td>
<td>Enables or disables multiple active result sets (MARS) on the connection if the server is SQL Server 2005 or later. Possible values are &quot;yes&quot; and &quot;no&quot;. The default is &quot;no&quot;.</td>
</tr>
<tr>
<td>QuotedId</td>
<td>When &quot;yes,&quot; QUOTED_IDENTIFIERS is set ON for the connection, SQL Server uses the SQL-92 rules regarding the use of quotation marks in SQL statements. When &quot;no&quot;, QUOTED_IDENTIFIERS is set OFF for the connection. SQL Server then follows the legacy Transact-SQL rules regarding the use of quotation marks in SQL statements.</td>
</tr>
<tr>
<td>Regional</td>
<td>When &quot;yes,&quot; the SQL Native Client ODBC driver uses client settings when converting currency, date, and time data to character data. When &quot;no,&quot; the driver uses ODBC standard strings to represent currency, date, and time data that is converted to character data.</td>
</tr>
<tr>
<td>Server</td>
<td>The name of an instance of SQL Server to connect to. The value must be either the name of a server on the network, or the name of a SQL Server Configuration Manager advanced server entry.</td>
</tr>
<tr>
<td>Trusted_Connection</td>
<td>When &quot;yes,&quot; instructs the SQL Native Client ODBC driver to use Windows Authentication Mode for login validation. Otherwise, instructs the SQL Native Client ODBC driver to use a SQL Server user name and password for login validation.</td>
</tr>
<tr>
<td>TrustServerCertificate</td>
<td>When used with the Encrypt parameter, enables encryption using a self-signed server certificate.</td>
</tr>
</tbody>
</table>

**SQL Server ODBC Driver (SQL Server 2000)**

The following table lists OBDC connection string parameters and their descriptions for SQL Server ODBC Driver (SQL Server 2000).
Installing sites

ODBC data sources, drivers and connection string parameters

## Oracle 9i/10g ODBC Driver

The following table lists ODBC connection string parameters and their descriptions for Oracle 9i/10g ODBC Driver.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>DSN</td>
<td>ODBC Data Source Name</td>
<td>User-supplied name</td>
</tr>
<tr>
<td>DBQ</td>
<td>TNS Service Name</td>
<td>User-supplied name</td>
</tr>
<tr>
<td>UID</td>
<td>User ID or User Name</td>
<td>User-supplied name</td>
</tr>
<tr>
<td>PWD</td>
<td>Password</td>
<td>User-supplied password</td>
</tr>
<tr>
<td>DBA</td>
<td>Database Attribute</td>
<td>( W ) = Write access (default) \n( R ) = Read-only access</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>AnsINPW</td>
<td>Determines whether to use ANSI null padding and warnings. If &quot;yes&quot; and you have character data of size 10 (not varchar) in your SQL Server, and you select that data, it returns all 10 characters. If the data only has 2 characters (&quot;AA&quot;, for example), you will get AA with 8 blank spaces padded at the end. Default value is &quot;yes&quot;.</td>
<td></td>
</tr>
<tr>
<td>AutoTranslate</td>
<td>Determines whether binary data is treated like character data. Possible values are &quot;yes&quot; and &quot;no&quot;; default value is &quot;yes&quot;.</td>
<td></td>
</tr>
<tr>
<td>Database</td>
<td>Name of the default SQL Server database for the connection.</td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td>SQL Server language name. If connecting to a SQL Server with multiple languages, Language specifies which set of messages are used for the connection. Default value is &quot;us_english&quot;.</td>
<td></td>
</tr>
<tr>
<td>QuotedId</td>
<td>Determines whether to use quoted identifier (for example, a double quote around the table name). Possible values are &quot;yes&quot; and &quot;no&quot;; default value is &quot;yes&quot;.</td>
<td></td>
</tr>
<tr>
<td>Regional</td>
<td>When &quot;yes,&quot; the SQL Server ODBC driver uses client settings when converting currency, date, and time data to character data. When &quot;no,&quot; the driver uses ODBC standard strings to represent currency, date, and time data that is converted to character data.</td>
<td></td>
</tr>
<tr>
<td>Server</td>
<td>The name of an instance of SQL Server to connect to.</td>
<td></td>
</tr>
<tr>
<td>Trusted_Connection</td>
<td>Determines whether to use SQL Server Authentication or Windows Authentication for login validation. &quot;No&quot; indicates that you want to use SQL Authentication; &quot;yes&quot; indicates that you want to use Windows Authentication.</td>
<td></td>
</tr>
</tbody>
</table>
### Parameter Description Values

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Values</th>
</tr>
</thead>
</table>
| APA       | Applications Attributes                          | T = Thread safety enabled (default)  
                                                            F = Thread safety disabled |
| RST       | Result Sets                                      | T = Result sets enabled (default)  
                                                            F = Result sets disabled |
| QTO       | Query Timeout Option                             | T = Query timeout enabled (default)  
                                                            F = Query timeout disabled |
| CSR       | Close Cursor Enabled                             | T = Close cursor enabled  
                                                            F = Close cursor disabled (default) |
| BAM       | Batch Autocommit Mode                            | IfAllSuccessful = Commit only if all statements are successful (default)  
                                                                  UpToFirstFailure = Commit up to first failing statement (V7 ODBC behavior)  
                                                                  AllSuccessful = Commit all successful statements (only when connected to an Oracle 8 database; against other databases, same behavior as V7) |
| PFC       | Prefetch Count                                   | User-supplied numeric value (0 or greater). Default is 10. |
| FEN       | Failover Enabled                                  | T = Failover enabled (default)  
                                                            F = Failover disabled |
| FRC       | Failover Retry Count                             | User-supplied numeric value. Default is 10. |
| FDL       | Failover Delay                                   | User-supplied numeric value. Default is 10. |
| LOB       | LOB Writes Enabled                               | T = LOBs enabled (default)  
                                                            F = LOBs disabled |
| FRL       | Force Retrieval of Oracle Long Column            | T = Forced long reads enabled  
                                                            F = Forced long reads disabled (default) |
| MTS       | Microsoft Transaction Server Support             | T = Disabled  
                                                            F = Enabled (default) |
| FWC       | Force SQL_WCHAR Support                         | T = Force SQL_WCHAR enabled  
                                                            F = Force SQL_WCHAR disabled (default) |
| EXC       | EXEC Syntax Enabled                              | T = EXEC syntax enabled  
                                                            F = EXEC syntax disabled (default) |
### Installing sites

**ODBC data sources, drivers and connection string parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>XSM</td>
<td>Schema Field</td>
<td><strong>Default</strong> = Default (default)</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Database</strong> = Database name</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Owner</strong> = Owner name</td>
</tr>
<tr>
<td>TLO</td>
<td>Translation Option</td>
<td>User-supplied numeric value. Default is 0.</td>
</tr>
<tr>
<td>TLL</td>
<td>Translation Library Name</td>
<td>User-supplied name</td>
</tr>
</tbody>
</table>
Installing Web applications and servers
Overview

- “Installing BusinessObjects Planning Server” on page 93
- “Installing the BusinessObjects Planning Web site and Gateway” on page 100
Installing BusinessObjects Planning Server

The BusinessObjects Planning Server processes the rules that govern the BusinessObjects Planning Web applications, such as the business logic and calculation engine operations. Along with a BusinessObjects Planning Site, it is the core part of the back end system that provides the information for Internet-based BusinessObjects Planning users.

This section provides the information necessary to install the BusinessObjects Planning Server. Specifically, this section provides information about:

- “Installing BusinessObjects Planning Server” on page 93
- “Starting BusinessObjects Planning Server” on page 98

Installing BusinessObjects Planning Server

This section explains how to install BusinessObjects Planning Server. For information on hardware and software requirements, see the Architecture Guide.

If you are installing BusinessObjects Planning Server on Windows Server 2003, you must customize certain security settings after completing the installation process to allow for the proper operation of BusinessObjects Planning Server. For more information on customizing these settings, refer to the Configuring Security guide.

**Note:** BusinessObjects Planning Server requires a minimum Microsoft Data Access Components (MDAC) version of 2.1.2. MDAC is not installed with BusinessObjects Planning Server automatically. For information on customizing your installation, including automating the installation of MDAC or changing the minimum MDAC version, “Customizing installations” on page 157.

**Note:** By default, the BusinessObjects Planning Scheduler service is installed with BusinessObjects Planning Server.

**To install BusinessObjects Planning Server:**
1. From the designated BusinessObjects Planning Server machine, expand the AppServer folder on the BusinessObjects Planning installation CD or network share and run CartesisPlanningServer.msi.

**Warning:** You cannot install from a mapped network drive if you are using Microsoft Terminal Services on Windows 2000 or earlier operating systems. You must either copy the installation package to the Terminal
Services computer and run the installation from this location, or you must use the full universal naming convention (UNC) path to the installation package.

2. In the Welcome dialog box, click **Next**.

3. In the Destination Folder dialog box, accept the default installation path, or click **Change** to specify the path to where you want the BusinessObjects Planning Server to be installed.

**Note:** You cannot change the installation path if you already have a BusinessObjects Planning application installed on the machine.

4. Click **Next**.
5. In the Logon information dialog box, in the Domain text box, type the name of the domain to which the BusinessObjects Planning Server account belongs.

6. In the User text box, type the name of the BusinessObjects Planning Server account.

7. In the Password text box, type the account's password.

8. In the Confirm Password text box, retype the account's password.

9. Click Next.

10. In the Ready to Install the Program dialog box, click Install.

11. In the Folder locations dialog box, in the Path to the local folder text box, type the path to your local folder or click Browse to specify a location.
In the Path to the site’s shared folder text box, type the path to the BusinessObjects Planning shared folder or click **Browse** to specify a location.

**Configuration Assistant**

**Folder locations**

Specify the location of the site’s shared and local folders

- **Path to the local folder:**
  - [%ProgramFiles%]
  - [%ProgramFiles%]BusinessObjectsPlanning
- **Path to the site’s shared folder:**
  - //spa100/Cartesia/StateBank

- **This is a multi-user environment:**
  - Select the multi-user environment option only if the computer hosts multi-user sessions (for example, if this is a Windows Terminal Services Server or Citrix WinFrame Server)
  - Skip the verification of folders (not recommended)

**OR**

Select the **This is a multi-user environment** check box if you are connected to a multi-user environment such as Citrix or Microsoft Terminal Services.

**Configuration Assistant**

**Folder locations**

Specify the location of the site’s shared and local folders

- **Path to the local machine folder:**
  - [%ProgramFiles%]
  - [%ProgramFiles%]BusinessObjectsPlanning
- **Path to the local user folder:**
  - [%ProgramFiles%]BusinessObjectsPlanning
- **Path to the site’s shared folder:**
  - //spa100/Cartesia/StateBank

- **This is a multi-user environment:**
  - Select the multi-user environment option only if the computer hosts multi-user sessions (for example, if this is a Windows Terminal Services Server or Citrix WinFrame Server)
  - Skip the verification of folders (not recommended)

In the Path to the local machine folder text box, type the path to the local machine directory or click **Browse** to specify a location.
Note: The local machine folder is the directory on multi-user machines such as Citrix or Microsoft Terminal Services where the business model files and Planning.ini file are stored. All other files are stored in the local user folder.

In the Path to the local user folder text box, type the path to your local folder or click Browse to specify a location.

In the Path to the site’s shared folder text box, type the path to the BusinessObjects Planning shared folder or click Browse to specify a location.

12. Select **Skip the verification of directories** if you don’t want the installer to verify that these folders exist.

**Note:** It is recommended that you do not select the option **Skip the verification of directories**.

**Warning:** If these folders don’t exist, the installer will not create them for you.

13. Click Next.

14. In the ODBC Configuration dialog box, select **Use the existing data source** if you already have a data source configured on your machine.

**Note:** This option is not available if there are no data sources configured on your machine.

OR

Select **Configure the data source for an installed ODBC driver on your local machine** if you want to configure the data source by choosing from the drivers that are configured for the site. From the Installed ODBC driver list, select the ODBC driver that is installed locally on your computer and most closely matches the ODBC driver configured on the site. From the ODBC driver with predefined data sources list, select an ODBC driver from the list of drivers configured on the site.

OR

Select **Launch ODBC Administrator and configure the data source manually** if you want to configure the data source manually. Click **Next**. Configure your ODBC driver manually.

OR
Installing Web applications and servers

Installing BusinessObjects Planning Server

Select the **Skip the data source configuration** check box if you want to configure the data source at a later time.

15. Select the **Skip the data source verification** check box if you do not want to verify your connection to the data source once you have configured it.

   **Note:** It is recommended that you do not select the option **Skip the data source verification**.

16. Click **Next**.

   **Note:** The folder location information and the ODBC connection information can be changed if your settings or site changes. For detailed information on how to change any of your settings, see the Using the Configuration Assistant guide.

17. Click **Finish**.

Starting BusinessObjects Planning Server

After installing BusinessObjects Planning Server, you must manually start the server using Windows Services.

To start the server using Windows Services, you must be a member of the Windows Administrator group.

**Note:** The BusinessObjects Planning Server Monitor service (CtpSvrMonitor) is started with BusinessObjects Planning Server (CtpServer) automatically. The BusinessObjects Planning Integrated Scheduler service (CtpSchedSvcInt) must be started on its own.
Installing Web applications and servers

Installing BusinessObjects Planning Server

To start a BusinessObjects Planning Server (Windows 2000):

1. From the Start menu, select Settings and Control Panel.
2. In the Control Panel, double-click Administrative Tools and double-click Services.
3. In the Services dialog box, right-click BusinessObjects Planning Server and click Start.

A message is displayed indicating that the Service is attempting to start the BusinessObjects Planning Server.

Note: If the BusinessObjects Planning Server does not start, or an error message is displayed, ensure your Windows Password is correct. To do this, right-click BusinessObjects Planning Server, and select Properties. In the BusinessObjects Planning Server Properties dialog box, click the Log On tab. Re-enter and re-confirm your password, click OK, and repeat step 3.

To start a BusinessObjects Planning Server (Windows 2003):

1. From the Start menu, select Administrative Tools and Services.
2. In the Services dialog box, right-click BusinessObjects Planning Server and click Start.

A message is displayed indicating that the Service is attempting to start the BusinessObjects Planning Server service.
Installing Web applications and servers

Installing the BusinessObjects Planning Web site and Gateway

Note: If the BusinessObjects Planning Server service does not start, or an error message is displayed, ensure your Windows Password is correct. To do this, right-click BusinessObjects Planning Server, and select Properties. In the BusinessObjects Planning Server Properties dialog box, click the Log On tab. Re-enter and re-confirm your password, and click OK and repeat step 2.

Installing the BusinessObjects Planning Web site and Gateway

The BusinessObjects Planning Web site provides the presentation framework for BusinessObjects Planning Web applications. Internet-based users request information from the Web site and have their requests sent by the BusinessObjects Planning Gateway to the BusinessObjects Planning Server. The request is then acted upon by the BusinessObjects Planning Server, and returned back through the BusinessObjects Planning Gateway to the users.

This section provides information about installing the BusinessObjects Planning Web site and the BusinessObjects Planning Gateway. Specifically, this section provides information about:

• “Installing the BusinessObjects Planning Web site and Gateway on one machine” on page 100
• “Installing the BusinessObjects Planning Web site and Gateway on two machines” on page 112

Installing the BusinessObjects Planning Web site and Gateway on one machine

The following steps assume that you are installing the BusinessObjects Planning Web site and the BusinessObjects Planning Gateway on the same machine. For information on how to install on separate machines, “Installing the BusinessObjects Planning Web site and Gateway on two machines” on page 112. For information on hardware and software requirements, see the Architecture Guide.

If you are installing the BusinessObjects Planning Web site and the BusinessObjects Planning Gateway on Windows Server 2003, you must customize certain security settings after completing the installation process to allow for the proper operation of BusinessObjects Planning applications. For more information on customizing these settings, refer to the Configuring Security guide.
Installing Web applications and servers
Installing the BusinessObjects Planning Web site and Gateway

Note: For information on customizing your installation, “Customizing installations” on page 157.

To install the BusinessObjects Planning Web components:
1. From the designated Web server, expand the WebServer folder on the BusinessObjects Planning installation CD or network share and run CartesisPlanningWebServer.msi.

   Warning: You cannot install from a mapped network drive if you are using Microsoft Terminal Services on Windows 2000 or earlier operating systems. You must either copy the installation package to the Terminal Services computer and run the installation from this location, or you must use the full universal naming convention (UNC) path to the installation package.

2. In the Welcome dialog box, click Next.
3. In the Destination Folder dialog box, accept the default installation path, or click Change to specify the path to where you want the BusinessObjects Planning Gateway and Web sites to be installed.

   Note: You cannot change the installation path if you already have a BusinessObjects Planning application installed on the machine.

4. Click Next.
5. In the Custom Setup dialog box, select **BusinessObjects Planning Gateway** and **BusinessObjects Planning Web site** from the list of applications and features.

![Custom Setup dialog box](image)

6. Click **Next**.

7. In the Web site type dialog box, select **Stand alone web site** if the BusinessObjects Planning Analyst site is going to be installed as a stand alone Web site. Go to step 11.

OR
Select **Virtual web site** if the BusinessObjects Planning Analyst site is going to be installed as a virtual Web site.

8. Click **Next**.

9. In the Virtual web site settings dialog box, select the name of the root Web site.

10. Click **Next**. Go to step 14.
11. In the Stand alone web site settings dialog box, in the IP Address text box, enter the IP address of the Web server.

12. In the Port number text box, type the port to which the Web server listens.

13. Click Next.

14. In the Web site name dialog box, type the name of the BusinessObjects Planning Analyst site in the Web site name text box, and click Next.

15. In the JNLP Settings dialog box, specify the location of the Java Network Launching Protocol (JNLP) file that will be used to deploy the Workforce Planning Configuration Editor, and click Next.
Installing Web applications and servers

Installing the BusinessObjects Planning Web site and Gateway

Note: You can accept the default value or change the location. This value will be written to the files wp_configeditor.jnlp <field name=codebase> and wp_configeditor.html <field name=app>. If you change the JNLP settings after installation, you must manually update these two files.

16. In the Ready to Install the Program dialog box, click Install.

The installation wizard copies program files to your system and registers the product. Once the files are installed, you must configure the communication layer between the BusinessObjects Planning Analyst site and the BusinessObjects Planning Gateway.

Note: If you receive any messages warning of the necessity to write registry settings, click Yes.

17. In the BusinessObjects Planning WebServers - Installation Wizard confirmation box, click OK.
18. In the Distributed COM Configuration Properties dialog box, select **CtpWebGate** from the list, and click **Properties**.

![Distributed COM Configuration Properties dialog box]

19. On the General page, select **None** from the Authentication Level list.

![CtpWebGate Properties dialog box]

20. Click the **Location** tab.
21. On the Location page, select the **Run application on this computer** check box.

22. Click the **Security** tab.
23. On the Security page, select the **Use custom access permissions** option. Click **Edit** to customize the users and groups that have access to the BusinessObjects Planning Gateway.

24. In the Registry Value Permissions dialog box, click **Add**.

25. In the Add Users and Groups dialog box, select the **CartesisPlanning** and **System** groups from the Names list, and click **Add**.
26. From the Type of Access list, select **Allow Access**, and click **OK**.

![Add Users and Groups dialog box](image)

27. In the Registry Value Permissions dialog box, click **OK**.

28. On the Security page, select the **Use custom launch permissions** option. Click **Edit** to customize the users and groups that can launch the BusinessObjects Planning Gateway.

29. In the Registry Value Permissions dialog box, click **Add**. Grant the following rights:

<table>
<thead>
<tr>
<th>Group</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone</td>
<td>Allow Launch</td>
</tr>
<tr>
<td>SYSTEM</td>
<td>Allow Launch</td>
</tr>
</tbody>
</table>

30. Click **OK**.

31. On the Security page, select the **Use custom configuration permissions** option. Click **Edit** to customize the users and groups that can change the BusinessObjects Planning Gateway registry key values.
32. In the Registry Key Permissions dialog box, verify that the Everyone group is listed and that its access type is Read. Verify that the SYSTEM group is listed and that its access type is Full Control. If both groups are listed with the proper access type, click OK; otherwise, click Add to add the missing groups.

33. On the CtpWebGate Properties page, click the Identity tab.

34. On the Identity page, select the This user option to add the default user account under which the Gateway will run.

You must select a user that:

- Is a member of the network domain
- Is a BusinessObjectsPlanning user
- Has the following specific administrative rights on the local machine: logs on locally, and logs on as a batch job

35. In the User text box, type the user’s domain and name, or click Browse to select a user from the network domain.

36. In the Password text box, type the user’s password.

37. In the Confirm Password text box, retype the password.
Note: This password must be updated every time the default user updates his or her main intranet account password. If the password is not updated, the Gateway application will not run.

38. Click **OK**.

39. If you are installing the Gateway Server on a machine that is running Windows 2000 Server, in the Distributed COM Configuration Properties dialog box, click **Default Properties**.

   OR
Installing Web applications and servers

Installing the BusinessObjects Planning Web site and Gateway

If you are installing on a machine that is running something other than Windows 2000 Server, continue on to step 40.

40. In the Default Authentication Level list, select [None].

41. Click OK to close the Distributed COM Configuration Properties dialog box.

Note: To access the CtpWebGate properties outside of the installation wizard, run \dcomcnfg.exe from a command prompt. Always recycle the Web server after changing the CtpWebGate properties.

42. In the BusinessObjects Planning Installation Wizard Complete dialog box, click Finish.

43. If you are prompted to restart the computer, wait until Windows is completely initialized, and then click Yes to restart the computer.

Installing the BusinessObjects Planning Web site and Gateway on two machines

The following steps assume that you are installing the BusinessObjects Planning Web site on one machine and the BusinessObjects Planning Gateway on a different machine. If you are installing all the components on the same machine, “Installing the BusinessObjects Planning Web site and Gateway on one machine” on page 100 for more information.
If you are installing the BusinessObjects Planning Web site and the BusinessObjects Planning Gateway on Windows Server 2003, you must customize certain security settings after completing the installation process to allow for the proper operation of BusinessObjects Planning applications. For more information on customizing these settings, refer to the Configuring Security guide.

**Note:** For information on customizing your installation, “Customizing installations” on page 157.

### Installing BusinessObjects Planning Gateway

This section describes how to install the BusinessObjects Planning Gateway.

1. **To install the BusinessObjects Planning Gateway:**
   - From the designated gateway server, expand the **WebServer** folder on the BusinessObjects Planning installation CD or network share and run CartesisPlanningWebServer.msi.
     - **Warning:** You cannot install from a mapped network drive if you are using Microsoft Terminal Services on Windows 2000 or earlier operating systems. You must either copy the installation package to the Terminal Services computer and run the installation from this location, or you must use the full universal naming convention (UNC) path to the installation package.
   - In the Welcome dialog box, click **Next**.
   - In the Destination Folder dialog box, accept the default installation path, or click **Change** to specify the path to where you want the BusinessObjects Planning Gateway to be installed.
Installing Web applications and servers

Installing the BusinessObjects Planning Web site and Gateway

**Note:** You cannot change the installation path if you already have a BusinessObjects Planning application installed on the machine.

4. Click **Next**.

5. In the Custom Setup dialog box, select **BusinessObjects Planning Gateway** from the list of applications and features, and deselect the BusinessObjects Planning Analyst site.

6. Click **Next**.

7. In the Ready to Install the Program dialog box, click **Install**.
The installation wizard copies program files to your system and registers the product. Once the files are installed, you must configure the communication layer between the BusinessObjects Planning Analyst site and the BusinessObjects Planning Gateway Server.

**Note:** If you receive any messages warning of the necessity to write registry settings, click **Yes**.

8. In the BusinessObjects Planning Installation Wizard confirmation box, click **OK**.

9. In the Distributed COM Configuration Properties dialog box, select **CtpWebGate** from the list, and click **Properties**.
10. On the General page, select **None** from the Authentication Level list.

11. Click the **Location** tab.

12. On the Location page, select the **Run application on this computer** check box.
13. Click the **Security** tab.

14. On the Security page, select the **Use custom access permissions** option. Click **Edit** to customize the users and groups that have access to the BusinessObjects Planning Gateway.

15. In the Registry Value Permissions dialog box, click **Add**.

16. In the Add Users and Groups dialog box, select the **CartesisPlanning** and **System** groups from the Names list, and click **Add**.
17. From the Type of Access list, select Allow Access, and click OK.

18. In the Registry Value Permissions dialog box, click OK.

19. On the Security page, select the Use custom launch permissions option. Click Edit to customize the users and groups that can launch the BusinessObjects Planning Gateway.

20. In the Registry Value Permissions dialog box, click Add. Grant the following rights:

<table>
<thead>
<tr>
<th>Group</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone</td>
<td>Allow Launch</td>
</tr>
<tr>
<td>SYSTEM</td>
<td>Allow Launch</td>
</tr>
</tbody>
</table>

21. Click OK.

22. On the Security page, select the Use custom configuration permissions option. Click Edit to customize the users and groups that can change the BusinessObjects Planning Gateway registry key values.
23. In the Registry Key Permissions dialog box, verify that the Everyone group is listed and that its access type is Read. Verify that the SYSTEM group is listed and that its access type is Full Control. If both groups are listed with the proper access type, click OK; otherwise, click Add to add the missing groups.

24. On the CtpWebGate Properties page, click the Identity tab.

25. On the Identity page, select the This user option to add the default user account under which the Gateway will run.

   You must select a user that:
   • Is a member of the network domain
   • Is a BusinessObjectsPlanning user
   • Has the following specific administrative rights on the local machine: logs on locally, and logs on as a batch job

26. In the User text box, type the user’s domain and name, or click Browse to select a user from the network domain.

27. In the Password text box, type the user’s password.

28. In the Confirm Password text box, retype the password.
Installing Web applications and servers

Installing the BusinessObjects Planning Web site and Gateway

**Note:** This password must be updated every time the default user updates his or her main intranet account password. If the password is not updated, the Gateway application will not run.

29. Click **OK**.

30. If you are installing the Gateway Server on a machine that is running Windows 2000 Server, in the Distributed COM Configuration Properties dialog box, click **Default Properties**.

OR
Installing Web applications and servers

Installing the BusinessObjects Planning Web site and Gateway

If you are installing on a machine that is running something other than Windows 2000 Server, continue on to step 32.

31. In the Default Authentication Level list, select [None].
32. Click OK to close the Distributed COM Configuration Properties dialog box.
   
   **Note:** To access the CtpWebGateServer properties outside of the installation wizard, run `dcomcnfg.exe` from a command prompt. Always recycle the Web server after changing the CtpWebGateServer properties.

33. In the BusinessObjects Planning Installation Wizard Complete dialog box, Click Finish.

34. If you are prompted to restart the computer, wait until Windows is completely initialized, and then click Yes to restart the computer.

**Installing the BusinessObjects Planning Web site**

This section describes how to install the BusinessObjects Planning Web site.

- **To install the BusinessObjects Planning Web site:**
  1. From the designated Web server, expand the WebServer folder on the BusinessObjects Planning installation CD or network share and run `CartesisPlanningWebServer.msi`.

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Installing Web applications and servers

Installing the BusinessObjects Planning Web site and Gateway

Warning: You cannot install from a mapped network drive if you are using Microsoft Terminal Services on Windows 2000 or earlier operating systems. You must either copy the installation package to the Terminal Services computer and run the installation from this location, or you must use the full universal naming convention (UNC) path to the installation package.

2. In the Welcome dialog box, click Next.

3. In the Destination Folder dialog box, accept the default installation path, or click Change to specify the path to where you want the BusinessObjects Planning Web sites to be installed.

Note: You cannot change the installation path if you already have a BusinessObjects Planning application installed on the machine.

4. Click Next.
5. In the Custom Setup dialog box, select **BusinessObjects Planning Analyst site** from the list of applications and features.

6. Click **Next**.

7. In the Web site type dialog box, select **Stand alone web site** if the BusinessObjects Planning Analyst site is going to be installed as a stand alone Web site. Go to step 11.

   OR

   Select **Virtual web site** if the BusinessObjects Planning Analyst site is going to be installed as a virtual Web site.
8. Click **Next**.

9. In the Virtual web site settings dialog box, select the name of the root Web site.

10. Click **Next**. Go to step 14.

11. In the Stand alone web site settings dialog box, in the IP Address text box, type the IP adress of the Web server or select it from the drop down list.

12. In the Port number text box, type the port to which the Web server listens.

13. Click **Next**.
14. In the Web site name dialog box, type the name of the BusinessObjects Planning Analyst site in the Web site name text box, and click Next.

15. In the JNLP Settings dialog box, specify the location of the Java Network Launching Protocol (JNLP) file that will be used to deploy the Workforce Planning Configuration Editor, and click Next.

**Note:** You can accept the default value or change the location. This value will be written to the files wp_configeditor.jnlp <field name=codebase> and wp_configeditor.html <field name=app>. If you change the JNLP settings after installation, you must manually update these two files.
16. In the Ready to Install the Program dialog box, click **Install**.

The installation wizard copies program files to your system and registers the product. Once the files are installed, you must configure the communication layer between the BusinessObjects Planning Analyst site and the BusinessObjects Planning Gateway.

**Note:** If you receive any messages warning of the necessity to write registry settings, click **Yes**.

17. In the BusinessObjects Planning Installation Wizard confirmation box, click **OK**.

18. In the Distributed COM Configuration Properties dialog box, select **CtpWebGate** from the list, and click **Properties**.
19. On the General page, select **None** from the Authentication Level list.

![Image of CplWebGate Properties window]

20. Click the **Location** tab.

21. On the Location page, select the **Run application on the following computer** check box.

22. In the text box, type the name of the computer that is designated as the BusinessObjects Planning Gateway.

OR
Click **Browse**. Locate and select the computer that is designated as the BusinessObjects Planning Gateway from the computers listed on your network.

23. Click **OK**.

24. Click **OK** again to close the Distributed COM Configuration Properties dialog box.

   **Note:** To access the CtpWebGateServer properties outside of the installation wizard, run `dcomcnfg.exe` from a command prompt. Always recycle the Web server after changing the CtpWebGateServer properties.

25. In the BusinessObjects Planning Installation Wizard Complete dialog box, click **Finish**.

26. If you are prompted to restart the computer, wait until Windows is completely initialized, and then click **Yes** to restart the computer.
Installing BusinessObjects Planning Scheduler
Overview

- "Installing BusinessObjects Planning Scheduler" on page 131
- “Starting BusinessObjects Planning Scheduler” on page 136
- “Using BusinessObjects Planning Script Executor” on page 137
Installing BusinessObjects Planning Scheduler

This installation package installs BusinessObjects Planning Scheduler as a Windows service, and BusinessObjects Planning Script Executor. For information on hardware and software requirements, see the Architecture Guide.

Note: BusinessObjects Planning Scheduler requires a minimum Microsoft Data Access Components (MDAC) version of 2.1.2. MDAC is not automatically installed with BusinessObjects Planning Scheduler. For information on customizing your installation, including automating the installation of MDAC or changing the minimum MDAC version, “Customizing installations” on page 157.

To install BusinessObjects Planning Scheduler:
1. Expand the Scheduler folder on the installation CD or network share and run CartesisPlanningScheduler.msi.
   Warning: You cannot install from a mapped network drive if you are using Microsoft Terminal Services on Windows 2000 or earlier operating systems. You must either copy the installation package to the Terminal Services computer and run the installation from this location, or you must use the full universal naming convention (UNC) path to the installation package.
2. In the Welcome dialog box, click Next.
3. In the Destination Folder dialog box, accept the default installation path, or click Change to specify the path to where you want BusinessObjects Planning Scheduler to be installed.
**Note:** You cannot change the installation path if you already have a BusinessObjects Planning application installed on the machine.

4. **Click Next.**

5. In the Logon information dialog box, in the Domain text box, type the name of the domain to which the BusinessObjects Planning Scheduler account belongs.
6. In the User text box, type the name of the BusinessObjects Planning Scheduler account.
7. In the Password text box, type the account's password.
8. In the Confirm Password text box, retype the account's password.
9. Click **Next**.
10. In the Ready to Install the Program dialog box, click **Install**.
11. In the Folder locations dialog box, in the Path to BusinessObjects Planning local folder text box, type the path to your local folder or click **Browse** to specify a location.
   In the Path to BusinessObjects Planning Site’s shared folder text box, type the path to the BusinessObjects Planning shared folder or click **Browse** to specify a location.

OR
Select the **This is a multi-user environment** check box if you are connected to a multi-user environment such as Citrix or Microsoft Terminal Services.

In the Path to the BusinessObjects Planning local machine folder text box, type the path to the local machine directory or click **Browse** to specify a location.

**Note:** The local machine folder is the directory on multi-user machines such as Citrix or Microsoft Terminal Services where the business model files and INEAFinance.ini file are stored. All other files are stored in the local user folder.

In the Path to the BusinessObjects Planning local user folder text box, type the path to your local folder or click **Browse** to specify a location.

In the Path to the BusinessObjects Planning Site’s shared folder text box, type the path to the BusinessObjects Planning shared folder or click **Browse** to specify a location.

12. Select **Skip the verification of BusinessObjects Planning directories** if you don’t want the installer to verify that these folders exist.

**Warning:** If these folders don’t exist, the installer will not create them for you.

13. Click **Next**.

14. In the ODBC Configuration dialog box, select **Use the existing data source** if you already have a data source configured on your machine.

**Note:** This option is not available if there are no data sources configured on your machine.
OR

Select **Configure the data source for an installed ODBC driver on your local machine** if you want to configure the data source by choosing from the drivers that are configured for the site. From the Installed ODBC driver list, select the ODBC driver that is installed locally on your computer and most closely matches the ODBC driver configured on the site. From the ODBC driver with predefined data sources list, select an ODBC driver from the list of drivers configured on the site.

OR

Select **Launch ODBC Administrator and configure the data source manually** if you want to configure the data source manually. Click **Next**. Configure your ODBC driver manually.

OR

Select the **Skip the data source configuration** check box if you want to configure the data source at a later time.

15. Select the **Skip the data source verification** check box if you don’t want to verify your connection to the data source once you have configured it.

16. Click **Next**.

   **Note:** The folder location information and the ODBC connection information can be changed if your settings or site changes. For detailed information on how to change any of your settings, see the Using the Configuration Assistant guide.

17. Click **Finish**.
Starting BusinessObjects Planning Scheduler

After installing BusinessObjects Planning Scheduler, you must start it manually using Windows Services.

To start the service manually using Windows Services, you must be a member of the Windows Administrator group.

To start a BusinessObjects Planning Scheduler (Windows 2000):
1. From the Start menu, select Settings and Control Panel.
2. In the Control Panel, double-click Administrative Tools and double-click Services.
3. In the Services dialog box, right-click BusinessObjects Planning Scheduler and click Start.

A message is displayed indicating that the Service is attempting to start the BusinessObjects Planning Scheduler service.

**Note:** If the BusinessObjects Planning Scheduler service does not start, or an error message is displayed, ensure your Windows Password is correct. To do this, right-click BusinessObjects Planning Scheduler, and select Properties. In the BusinessObjects Planning Scheduler Properties dialog box, click the Log On tab. Re-enter and re-confirm your password, and click OK and repeat step 3.

To start a BusinessObjects Planning Scheduler (Windows 2003):
1. From the Start menu, select Administrative Tools and Services.
2. In the Services dialog box, right-click BusinessObjects Planning Scheduler and click Start.
A message is displayed indicating that the Service is attempting to start the BusinessObjects Planning Scheduler service.

**Note:** If the BusinessObjects Planning Scheduler service does not start, or an error message is displayed, ensure your Windows Password is correct. To do this, right-click **BusinessObjects Planning Scheduler**, and select **Properties**. In the BusinessObjects Planning Scheduler Properties dialog box, click the Log On tab. Re-enter and re-confirm your password, and click **OK** and repeat step 2.

**Using BusinessObjects Planning Script Executor**

BusinessObjects Planning Script Executor is the utility that executes BusinessObjects Planning scripts. BusinessObjects Planning Script Executor can be run using:

- BusinessObjects Planning Scheduler
- Command-line arguments
- Third-party schedulers

This section provides information about:

- “Installing BusinessObjects Planning Script Executor” on page 137
- “BusinessObjects Planning Script Executor command line syntax” on page 138

**Installing BusinessObjects Planning Script Executor**

BusinessObjects Planning Script Executor is installed by the following installation packages:

- BusinessObjects Planning Scheduler
Installing BusinessObjects Planning Scheduler

Using BusinessObjects Planning Script Executor

- BusinessObjects Planning Client
- BusinessObjects Planning Application Server

A BusinessObjects Planning Script Executor standalone executable (CtpScrExec.exe) can also be found by expanding the Site and Tools folder on the installation CD.

**BusinessObjects Planning Script Executor command line syntax**

When running BusinessObjects Planning Script Executor, commands must have the following syntax.

```
CtpScrExec.exe {options}
```

**Warning:** The machine that invokes BusinessObjects Planning Script Executor must have a BusinessObjects Planning local directory and a BusinessObjects Planning shared directory specified in either its registry or as environment variables. The name of the environment variables are: CTP_LOCALDIRECTORY and CTP_SHAREDDIRECTORY.
The minimum set of command line options for the standalone executor is:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| -@     | Specifies the name of an INI file to use in place of the other command-line options. The INI file must have the following structure:  

```
[INEAScript]
Model=
User= 
Script= 
Trigger= 
Comment= 
LogFile= 
```

Each keyword corresponds to the respective command line option. If the same option is specified in both command line and INI file, then the command line option takes precedence. The keywords are not case sensitive. |
| -M     | Specifies the business model. The identifier can be in any of the following forms:  

- Base36 string  
- FID:LID  
- Identifier  
- Full BusinessObjects Planning path |
| -U     | Specifies the user ID. It can be either of the following:  

- FID:LID  
- “identifier[@site]”  

If the user’s identity is not specified in the parameters, then the current user’s identity will be used. If it is specified, the current user must have rights to impersonate the specified user. |
| -S     | Specifies the script to execute. The identifier can be in any of the following forms:  

- Base36 string  
- FID:LID  
- Identifier  
- Full BusinessObjects Planning path  
- Full file system path |
| -T     | Specifies the name of a trigger file. |
| -C     | Specifies a comment to add to the scheduled execution. |
| -O     | Specifies the full path to the supplementary script job log file. This log file will be created in addition to the normal job log. |

**Examples**

The following examples use a sample INI file called revenue.ini. This INI file contains the following information:
Installing BusinessObjects Planning Scheduler

Using BusinessObjects Planning Script Executor

{d:\Cartesis\Planning\Scheduler\revenue.ini}
[INEAScript]
Model=100:45678
User=100:100
Script=\nts\Cartesis\site\public\scripts\ty65ds33.scp
Comment=Intermediate consolidation
LogFile=c:\tmp\scriptlog.txt

The following example demonstrates how to run BusinessObjects Planning Script Executor with parameters supplied by the revenue.ini file.

CtpScrExec.exe
   -@d:\Cartesis\Planning\Scheduler\revenue.ini

The following example demonstrates how to run BusinessObjects Planning Script Executor with most of the parameters supplied by the revenue.ini file, but as a different user and with a trigger file specified.

CtpScrExec.exe
   -@d:\Cartesis\Planning\Scheduler\revenue.ini
   -uandre@cartesis -mSPR_DPR
   -t"d:\Cartesis\Planning\ad hoc logs\Complete.txt"

The following example demonstrates how to run BusinessObjects Planning Script Executor with all of the parameters specified at the command line.

CtpScrExec.exe
   -mSPR_DPR
   -uabul@qa
   -s"Public\QA Scripts\Beta Testing\Revenue"
Installing workstation applications
Overview

- “Installing BusinessObjects Planning client applications” on page 143
- “Post-installation options” on page 151
Installing BusinessObjects Planning client applications

This section describes how to install BusinessObjects Planning client applications on a client workstation.

This section provides information about:
- “Installing BusinessObjects Planning client applications” on page 143
- “Installing the BusinessObjects Planning Excel Analyst” on page 148
- “Testing the installations” on page 149

Installing BusinessObjects Planning client applications

This section explains how to install BusinessObjects Planning client applications. For information on hardware and software requirements, see the Architecture Guide.

Note: BusinessObjects Planning client applications require a minimum Microsoft Data Access Components (MDAC) version of 2.1.2. MDAC is not installed with BusinessObjects Planning client applications automatically. For information on customizing your installation, including automating the installation of MDAC or changing the minimum MDAC version, “Customizing installations” on page 157.

To install BusinessObjects Planning applications on a client workstation:
1. Expand the Client folder on the installation CD or network share and run CartesisPlanningClient.msi.

   Warning: You cannot install from a mapped network drive if you are using Microsoft Terminal Services on Windows 2000 or earlier operating systems. You must either copy the installation package to the Terminal Services computer and run the installation from this location, or you must use the full universal naming convention (UNC) path to the installation package.

2. In the Welcome dialog box, click Next.
3. In the Destination Folder dialog box, accept the default installation path, or click Change to specify the path to where you want the BusinessObjects Planning client applications to be installed.
Installing workstation applications

Installing BusinessObjects Planning client applications

**Note:** You cannot change the installation path if you already have a BusinessObjects Planning application installed on the machine.

4. Click **Next**.
5. In the Custom Setup dialog box, select the BusinessObjects Planning client applications that you want to install.

6. Click **Next**.
7. Click **Install**.
8. In the Folder locations dialog box, in the Path to the local folder text box, type the path to your local folder or click **Browse** to specify a location.

   In the Path to the site's shared folder text box, type the path to the BusinessObjects Planning shared folder or click **Browse** to specify a location.

   ![Configuration Assistant dialog box](image)

   OR

   ![Configuration Assistant dialog box](image)
Installing workstation applications

Installing BusinessObjects Planning client applications

Select the **This is a multi-user environment** check box if you are connected to a multi-user environment such as Citrix or Microsoft Terminal Services.

In the Path to the local machine folder text box, type the path to the local machine directory or click **Browse** to specify a location.

**Note:** The local machine folder is the directory on multi-user machines such as Citrix or Microsoft Terminal Services where the business model files and Planning.ini file are stored. All other files are stored in the local user folder.

In the Path to the local user folder text box, type the path to your local folder or click **Browse** to specify a location.

In the Path to the site’s shared folder text box, type the path to the BusinessObjects Planning shared folder or click **Browse** to specify a location.

9. Select **Skip the verification of directories** if you do not want the installer to verify that these folder exist.

   **Warning:** If these folders do not exist, the installer will not create them for you.

10. Click **Next**.

11. In the ODBC Configuration dialog box, select **Use the existing data source** if you already have a data source configured on your machine.

   **Note:** This option is not available if there are no data sources configured on your machine.
Installing workstation applications

Installing BusinessObjects Planning client applications

OR

Select **Configure the data source for an installed ODBC driver on your local machine** if you want to configure the data source by choosing from the drivers that are configured for the site. From the Installed ODBC driver list, select the ODBC driver that is installed locally on your computer and most closely matches the ODBC driver configured on the site. From the ODBC driver with predefined data sources list, select an ODBC driver from the list of drivers configured on the site.

OR

Select **Launch ODBC Administrator and configure the data source manually** if you want to configure the data source manually. Click **Next**. Configure your ODBC driver manually.

OR

Select the **Skip the data source configuration** check box if you want to configure the data source at a later point.

12. Select the **Skip the data source verification** check box if you do not want to verify your connection to the data source once you have configured it.

13. Click **Next**.

**Note:** The folder location information and the ODBC connection information can be changed if your settings or site changes. For detailed information on how to change any of your settings, see the Using the Configuration Assistant guide.
Installing workstation applications

Installing BusinessObjects Planning client applications

14. Click Finish.

Installing the BusinessObjects Planning Excel Analyst

This stand-alone installation installs the SOAP toolkit, the BusinessObjects Planning Excel Analyst XLA files, and all relevant help files.

Note: For information on customizing your installation, “Customizing installations” on page 157.

To install the BusinessObjects Planning Excel Analyst:

1. Expand the ExcelAddIn folder on the installation CD or network share and run CartesisPlanningExcelAddIn.msi. (There may be a waiting period while the BusinessObjects Planning Installation Wizard performs a search on installed applications.)

   Warning: You cannot install from a mapped network drive if you are using Microsoft Terminal Services on Windows 2000 or earlier operating systems. You must either copy the installation package to the Terminal Services computer and run the installation from this location, or you must use the full universal naming convention (UNC) path to the installation package.

2. In the Welcome dialog box, click Next.

3. In the Destination Folder dialog box, accept the default installation path, or click Change to specify the path to where you want the BusinessObjects Planning Excel Analyst to be installed.
Installing workstation applications

Installing BusinessObjects Planning client applications

Note: You cannot change the installation path if you already have a BusinessObjects Planning application installed on the machine.

4. Click Next.
5. In the Ready to Install the Program dialog box, click Install.
6. Click Finish.

Testing the installations

Once you install BusinessObjects Planning applications on a client workstation, you should verify that the client has access to the data source.

Testing the BusinessObjects Planning Administrator and BusinessObjects Planning Analyst Pro installation

If BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro does not open properly, check your ODBC connections.

To check that the installation was successful:
1. Double-click the BusinessObjects Planning folder on your desktop.
2. In the BusinessObjects Planning window, double-click the BusinessObjects Planning Administrator or BusinessObjects Planning Analyst Pro icon.
Installing workstation applications

Installing BusinessObjects Planning client applications

Testing the BusinessObjects Planning Excel Analyst installation

After the BusinessObjects Planning Excel Analyst has been installed, open Microsoft Excel to ensure that the BusinessObjects Planning Excel Analyst has been installed correctly. If successful, the Excel interface has new toolbar items.

If the toolbar items are not visible, you must add them manually; "Troubleshooting the BusinessObjects Planning Excel Analyst" on page 151 for more information.
Troubleshooting the BusinessObjects Planning Excel Analyst

If you have followed the installation steps in this chapter, and the BusinessObjects Planning Excel Analyst components do not appear in the Excel interface, you must load the BusinessObjects Planning Excel Analyst into Excel manually.

To load the BusinessObjects Planning Excel Analyst:

1. Run Microsoft Excel.
2. From the Tools menu, select Add-Ins.
3. In the Add-Ins dialog box, click Browse to locate the folder where the BusinessObjects Planning Excel Analyst files were installed, and select INEAExcelAddIn.xla.
4. Click OK.
5. Click OK. The new toolbars and menus are incorporated into the Excel interface.

Post-installation options

This section provides information on the options available after an application has been installed. Specifically, this section provides information about:

- “Updating an application” on page 152
- “Modifying, repairing, and removing BusinessObjects Planning applications” on page 152
Updating an application

BusinessObjects Planning applications can be updated by using the Update utility. This utility launches the corresponding installation package to update the files without requiring you to reconfigure the installed features or products.

Note: You can only use the Update utility to update Release 4.5 or higher applications to a greater version.

Note: You cannot update an application by executing a higher version’s MSI file.

To update an application:
1. On the installation CD or network share, locate the folder that contains the BusinessObjects Planning Application you want to update.
2. Double-click CtpUpdate.exe.
3. In the Updating <Application> dialog box, click Next.
4. Click Finish.

Modifying, repairing, and removing BusinessObjects Planning applications

You can modify or repair a BusinessObjects Planning application using the installation wizard. When you rerun the installation wizard, it recognizes that a BusinessObjects Planning application is installed on your computer and directs you to the modify, repair, and remove section of the wizard.

Modifying a BusinessObjects Planning application

After installation, you can modify the BusinessObjects Planning applications and features installed on your computer.

Note: The Modify option is not available for all installation packages.

To modify a BusinessObjects Planning application:
1. Go to the Add/Remove Programs section of the Control Panel.
2. Select the BusinessObjects Planning application you want to modify and click Change.
3. In the Welcome dialog, click Next.
4. In the Program Maintenance dialog box, select **Modify**.

5. Click **Next**.

6. Navigate through the application’s installation screens and perform your modifications.

7. Click **Finish**.

**Repairing a BusinessObjects Planning application**

You can repair missing files, corrupt files, shortcuts, and registry entries for a malfunctioning BusinessObjects Planning application.

- **To repair a BusinessObjects Planning application:**
  1. Go to the Add/Remove Programs section of the Control Panel.
  2. Select the BusinessObjects Planning application you want to repair and click **Change**.
  3. In the Welcome dialog, click **Next**.
4. In the Program Maintenance dialog box, select **Repair**.

5. Click **Next**.

6. In the Ready to Repair the Program dialog box, click **Install**.

7. Click **Finish**.

**Removing a BusinessObjects Planning application**

After installation, you can remove BusinessObjects Planning applications installed on your computer.

- To remove a BusinessObjects Planning application:
  1. Go to the Add/Remove Programs section of the Control Panel.
  2. Select the BusinessObjects Planning application you want to modify and click **Remove**.
  3. In the Welcome dialog, click **Next**.
4. In the Program Maintenance dialog box, select **Remove**.

5. Click **Next**.

6. In the Remove the Program dialog box, click **Remove**.

7. Click **Finish**.
Installing workstation applications

Post-installation options
Customizing installations
Customizing installations

Overview

This section is intended for administrators who will be performing custom installations of BusinessObjects Planning applications for their organization. It assumes that you are familiar with the BusinessObjects Planning product, as well as multi-machine deployments of software.

This section provides information on the different installation modes and the customization options available. Specifically, this section provides information about:

• “Best practices for installation and customization” on page 158
• “Installation modes” on page 159
• “MSI properties” on page 160
• “The CtpSetup.ini configuration file” on page 172

Best practices for installation and customization

The following are considered best practices to follow when installing and customizing BusinessObjects Planning applications:

• Copy the contents of the install CD into a subfolder of the BusinessObjects Planning site’s shared folder so it is accessible to all users.

• When using Microsoft® SMS or similar means to deploy applications automatically, edit the customizable properties of the single MSI packages. For information about the customizable properties in the MSI packages, “MSI properties” on page 160.

• When deploying applications singly, use the shared configuration file for defining the installation parameters that may affect every user and/or computer on the network. For information about the configuration file, “The CtpSetup.ini configuration file” on page 172.

Order of operations

When an installation package starts execution, it begins by searching for a configuration file.

The following rules determine how the installation locates a configuration file:

1. If the INITINEASETUPFILENAME MSI property was edited to point to a configuration file, and the file is found, this file is used.

Note: A sample setup configuration file is found in the Site, INIFiles folder on the installation CD.
2. Otherwise, if the same property was set at run-time using the command-line option, and the file is found, this file is used.

   **Note:** The command-line parameters are the same as the editable properties of the individual MSI files. For example, to specify the name of the setup file for a BusinessObjects Planning Server installation, type:

   `CartesisPlanningServer.msi INITINEASETUPINIFILENAME=c:\setup\config.ini`

3. Otherwise, if the CtpSetup.ini file is found in the same folder where the MSI package is located, this file is used.

4. Otherwise, no setup configuration file is used.

   Regardless of whether or not the installation package uses a configuration file, the following rules, arranged according to priority, specify how configurable property values are used:

   1. If the setting is defined in the Registry, and its value is not empty, the registry value is used. This rule applies only to the Program Files folder setting.

   2. If a customizable setting has a valid value in the MSI database, the MSI value is used.

   3. If a customizable setting has a valid value in the configuration file, the file value is used.

   4. If the user can provide a value for the customizable setting, and the corresponding dialog box is not disabled, the installation prompts the user to provide the value.

   5. Otherwise, the installation package uses '0' for all values other than the installation directory, which by default is `c:\Cartesis\Planning\Programs`.

**Installation modes**

A BusinessObjects Planning installation package can be launched in one of the following modes:

- **Interactive mode**—In interactive mode the installation must at a minimum display:
  - The Welcome page
  - The Ready to Install page
  - The Completed page

  Interactive mode is the default for all BusinessObjects Planning installation packages.

- **Silent mode**—All user dialog boxes are disabled. The following packages can be launched in silent mode:
• Client
• BusinessObjects Planning Excel Analyst

You can invoke silent mode by executing the installation package from the command line with the /qn or the /qn+ parameters. For example, CartesisPlanningClient.msi /qn or CartesisPlanningClient.msi /qn+

The /qn parameter provides a completely silent installation. The qn+ parameter presents a brief text message at the end of the installation.

The mode you choose depends on your individual needs and configuration.

### MSI properties

MSI properties are the properties within each BusinessObjects Planning installation file that can be modified to allow a level of customization of installations. To modify an MSI property, open the MSI file with an MSI editor (such as Orca, which is available with the Microsoft Installer SDK), edit the property to use a specific value, and save and close the file.

The following BusinessObjects Planning application packages contain configurable installation properties:

• BusinessObjects Planning Server
• BusinessObjects Planning Login Server
• BusinessObjects Planning Scheduler
• BusinessObjects Planning Web Redirector
• BusinessObjects Planning Web Server
• BusinessObjects Planning Client
• BusinessObjects Planning Excel Analyst
• BusinessObjects Planning ODBO Provider
• BusinessObjects Planning Test Harness

**Warning:** Do not modify any properties other than the ones listed in the following tables. Modification to other properties can result in failed installations.

The following sections define configurable properties that can be used to customize your BusinessObjects Planning installations.

**Note:** Not all of the properties may be found in the corresponding MSI file. If the property is listed in the table but not found in the MSI file, you can add the property to the MSI file.
### The BusinessObjects Planning Server

The following table lists the configurable installation-related properties of the CartesisPlanningServer.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAACCOUNT</td>
<td>Specifies a system login account (including domain) to use to start the BusinessObjects Planning Server service.</td>
</tr>
<tr>
<td>INITINEAACCOUNT2</td>
<td>Specifies the encrypted password for the account.</td>
</tr>
<tr>
<td>INITINEASKIPFEATURES</td>
<td>Specifies a list of features to not install. The only feature that can be specified using this parameter is BusinessObjects Planning Scheduler.</td>
</tr>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning Server.</td>
</tr>
<tr>
<td>INITINEAMDACMINIMUMVERSION</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re-installed by the BusinessObjects Planning installation package.</td>
</tr>
<tr>
<td>INITINEAMDACPACKAGE</td>
<td>Specifies the fully-qualified path to the MDAC installation package (including file name). This path must be accessible to the target machine.</td>
</tr>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
<tr>
<td>INITINEASKIPDIALOGS</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. Applicable dialog box names are:</td>
</tr>
<tr>
<td></td>
<td>• DestinationDialog</td>
</tr>
<tr>
<td></td>
<td>• UserAccountDialog</td>
</tr>
</tbody>
</table>

The following table lists the configurable site-related properties of the CartesisPlanningServer.msi file.
Customizing installations

Overview

The following table lists the configurable properties of the CartesisPlanningLoginServer.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEASILENTCONFIG</td>
<td>Specifies whether or not to display any of the configuration screens during installation. 1=do not display any screens.</td>
</tr>
<tr>
<td>INITINEASKIPFOLDERS</td>
<td>Specifies whether or not to perform the folder configuration. 1=skip folder configuration.</td>
</tr>
<tr>
<td>INITINEALOCALDIRECTORY</td>
<td>Specifies the path to where local copies of BusinessObjects Planning files are stored.</td>
</tr>
<tr>
<td>INITINEALOCALMACINATEDIRECTORY</td>
<td>On multi-user machines such as Citrix® or Microsoft Terminal Services, specifies the path where the business model files and Planning.ini file are stored. All other files are stored in the local directory.</td>
</tr>
<tr>
<td>INITINEASHAREDDIRECTORY</td>
<td>Specifies the path to the BusinessObjects Planning site’s shared directory. The path may include the trailing back slash ().</td>
</tr>
<tr>
<td>INITINEASKIPVERIFYSHAREDANDER FOLDER</td>
<td>Specifies whether or not to verify the connection to the BusinessObjects Planning shared folder. 1=skip folder verification.</td>
</tr>
<tr>
<td>INITINEAOBDCCDASOURCESCNAME</td>
<td>Specifies the name of the ODBC data source.</td>
</tr>
<tr>
<td>INITINEAOBDCCDRIVERNAME</td>
<td>Specifies the name of the ODBC driver to use.</td>
</tr>
<tr>
<td>INITINEAOBDCTEMPLATE</td>
<td>Specifies the connection string parameters to use to connect to the database.</td>
</tr>
<tr>
<td>INITINEASKIPCREATEDSN</td>
<td>Specifies whether or not to skip the creation of a DSN. 1=skip DSN creation.</td>
</tr>
<tr>
<td>INITINEASKIPVERIFYDSN</td>
<td>Specifies whether or not to skip the verification of the DSN. 1=skip DSN verification.</td>
</tr>
</tbody>
</table>

BusinessObjects Planning Login Server

The following table lists the configurable properties of the CartesisPlanningLoginServer.msi file.
### Customizing installations

#### Overview

The following table lists the configurable installation-related properties of the CartesisPlanningScheduler.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEASILENTCONFIG</td>
<td>Specifies whether or not to display any of the configuration screens during installation. 1=do not display any screens.</td>
</tr>
<tr>
<td>INITINEASKIPFOLDERS</td>
<td>Specifies whether or not to perform the folder configuration. 1=skip folder configuration.</td>
</tr>
<tr>
<td>INITINEALOCALDIRECTORY</td>
<td>Specifies the path to where local copies of BusinessObjects Planning files are stored.</td>
</tr>
<tr>
<td>INITINEALOCALMACHINEDIRECTORY</td>
<td>On multi-user machines such as Citrix or Microsoft Terminal Services, specifies the path where the business model files and Planning.ini file are stored. All other files are stored in the local directory.</td>
</tr>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning Login Server.</td>
</tr>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
<tr>
<td>INITINEASKIPDIALOGS</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
<tr>
<td>INITINEAACCOUNT</td>
<td>Specifies a system login account (including domain) to use to start the BusinessObjects Planning Scheduler service.</td>
</tr>
<tr>
<td>INITINEAACCOUNT2</td>
<td>Specifies the encrypted password for the account.</td>
</tr>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning Server.</td>
</tr>
<tr>
<td>INITINEAMDACMINIMUMVERSION</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re-installed by the BusinessObjects Planning installation package.</td>
</tr>
</tbody>
</table>

#### BusinessObjects Planning Scheduler

The following table lists the configurable installation-related properties of the CartesisPlanningScheduler.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAACCOUNT</td>
<td>Specifies a system login account (including domain) to use to start the BusinessObjects Planning Scheduler service.</td>
</tr>
<tr>
<td>INITINEAACCOUNT2</td>
<td>Specifies the encrypted password for the account.</td>
</tr>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning Server.</td>
</tr>
<tr>
<td>INITINEAMDACMINIMUMVERSION</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re-installed by the BusinessObjects Planning installation package.</td>
</tr>
</tbody>
</table>
### Customizing installations

#### Overview

The following table lists the configurable site-related properties of the CartesisPlanningScheduler.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAMDACPACKAGE</td>
<td>Specifies the fully-qualified path to the MDAC installation package (including file name). This path must be accessible to the target machine.</td>
</tr>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
</tbody>
</table>
| INITINEASKIPDIALOGS             | Specifies a comma-separated list of dialog boxes to exclude from the installation. Applicable dialog box names are:  
  - DestinationDialog  
  - UserAccountDialog |
| INITINEASILENTCONFIG            | Specifies whether or not to display any of the configuration screens during installation. 1=do not display any screens. |
| INITINEASKIPFOLDERS             | Specifies whether or not to perform the folder configuration. 1=skip folder configuration. |
| INITINEALOCALDIRECTORY          | Specifies the path to where local copies of BusinessObjects Planning files are stored.    |
| INITINEALOCALMACHINEDIRECTORY   | On multi-user machines such as Citrix or Microsoft Terminal Services, specifies the path where the business model files and Planning.ini file are stored. All other files are stored in the local directory. |
| INITINEASHAREDDIRECTORY         | Specifies the path to the BusinessObjects Planning site’s shared directory. The path may include the trailing back slash (\). |
| INITINEASKIPVERIFYSHAREDFOLDER  | Specifies whether or not to verify the connection to the BusinessObjects Planning shared folder. 1=skip folder verification. |
| INITINEAODBCDATASOURCENAME      | Specifies the name of the ODBC data source.                                                |
| INITINEAODBCDRIVERNAME          | Specifies the name of the ODBC driver to use.                                               |
Customizing installations

Overview

The following table lists the configurable properties of the CartesisPlanningWebRedirector.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAODBCTEMPLATE</td>
<td>Specifies the connection string parameters to use to connect to the database.</td>
</tr>
<tr>
<td>INITINEASKIPCREATEDSN</td>
<td>Specifies whether or not to skip the creation of a DSN. 1=skip DSN creation.</td>
</tr>
<tr>
<td>INITINEASKIPVERIFYDSN</td>
<td>Specifies whether or not to skip the verification of the DSN. 1=skip DSN verification.</td>
</tr>
</tbody>
</table>

**BusinessObjects Planning Web Redirector**

The following table lists the configurable properties of the CartesisPlanningWebRedirector.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning Web Redirector.</td>
</tr>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
<tr>
<td>INITINEASKIPDIALOGS</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
</tbody>
</table>

**BusinessObjects Planning Web Server**

The following table lists the configurable installation-related properties of the CartesisPlanningWebServer.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
</table>
### Customizing installations

#### Overview

The following table lists the configurable site-related properties of the CartesisPlanningWebServer.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEASKIPFEATURES</td>
<td>Specifies a comma-separated list of feature names. The following notations should be followed:</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is in the list, it is not available to be installed.</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is prefixed with a minus sign, the feature is present but not selected in the Custom dialog box.</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is not present in the list:</td>
</tr>
<tr>
<td></td>
<td>• If the installation is running in interactive mode, users can install and/or uninstall the feature at their discretion.</td>
</tr>
<tr>
<td></td>
<td>• If the installation is running in silent mode, the feature is installed.</td>
</tr>
<tr>
<td></td>
<td>The features that can be specified using this parameter are:</td>
</tr>
<tr>
<td></td>
<td>• WebSite</td>
</tr>
<tr>
<td></td>
<td>• WebGate</td>
</tr>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning Web Server applications.</td>
</tr>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
</tbody>
</table>

The following table lists the configurable site-related properties of the CartesisPlanningWebServer.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEASILENTCONFIG</td>
<td>Specifies whether or not to display any of the configuration screens during installation. 1=do not display any screens.</td>
</tr>
<tr>
<td>INITINEASKIPFOLDERS</td>
<td>Specifies whether or not to perform the folder configuration. 1=skip folder configuration.</td>
</tr>
<tr>
<td>INITINEALOCALDIRECTORY</td>
<td>Specifies the path to where local copies of BusinessObjects Planning files are stored.</td>
</tr>
<tr>
<td>Parameter Name</td>
<td>Details</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>INITINEALOCALMACHINEDIRECTORY</td>
<td>On multi-user machines such as Citrix or Microsoft Terminal Services, specifies the path where the business model files and Planning.ini file are stored. All other files are stored in the local directory.</td>
</tr>
<tr>
<td>INITINEASHAREDDIRECTORY</td>
<td>Specifies the path to the BusinessObjects Planning site’s shared directory. The path may include the trailing back slash ().</td>
</tr>
<tr>
<td>INITINEASKIPVERIFYSHARED_FOLDER</td>
<td>Specifies whether or not to verify the connection to the BusinessObjects Planning shared folder. 1=skip folder verification.</td>
</tr>
</tbody>
</table>

**BusinessObjects Planning Client**

The following table lists the configurable installation-related properties of the CartesisPlanningClient.msi file.
<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEASKIPFEATURES</td>
<td>Specifies a comma-separated list of feature names. The following notation should be followed:</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is in the list, it is not available to be installed.</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is prefixed with a minus sign, the feature is present but not selected in the Custom dialog box.</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is not present in the list:</td>
</tr>
<tr>
<td></td>
<td>• If the installation is running in interactive mode, users can install and/or uninstall the feature at their discretion.</td>
</tr>
<tr>
<td></td>
<td>• If the installation is running in silent mode, the feature is installed.</td>
</tr>
<tr>
<td></td>
<td>The features that can be specified using this parameter are:</td>
</tr>
<tr>
<td></td>
<td>• Administrator</td>
</tr>
<tr>
<td></td>
<td>• BusinessObjects Planning Analyst Pro</td>
</tr>
<tr>
<td></td>
<td>• Scheduler</td>
</tr>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning client applications.</td>
</tr>
<tr>
<td>INITINEAMDACMINIMUMVERSION</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re-installed by the</td>
</tr>
<tr>
<td></td>
<td>BusinessObjects Planning installation package.</td>
</tr>
<tr>
<td>INITINEAMDACPACKAGE</td>
<td>Specifies the fully-qualified path to the MDAC installation package (including file name). This path must be accessible to the target machine.</td>
</tr>
</tbody>
</table>
### Customizing installations

#### Overview

The following table lists the configurable site-related properties of the CartesisPlanningClient.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
<tr>
<td>INITINEASKIPDIALOGS</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. Applicable dialog box names are:</td>
</tr>
<tr>
<td></td>
<td>• DestinationDialog</td>
</tr>
<tr>
<td></td>
<td>• CustomDialog</td>
</tr>
<tr>
<td>INITINEAICONSDisable</td>
<td>Specifies whether or not to disable Start menu icons for BusinessObjects Planning client applications. 1=disable icons.</td>
</tr>
<tr>
<td>INITINEASILENTCONFIG</td>
<td>Specifies whether or not to display any of the configuration screens during installation. 1=do not display any screens.</td>
</tr>
<tr>
<td>INITINEASKIPFOLDERS</td>
<td>Specifies whether or not to perform the folder configuration. 1=skip folder configuration.</td>
</tr>
<tr>
<td>INITINEALOCALDIRECTORY</td>
<td>Specifies the path to where local copies of BusinessObjects Planning files are stored.</td>
</tr>
<tr>
<td>INITINEALOCALMACHINEDIRECTORY</td>
<td>On multi-user machines such as Citrix or Microsoft Terminal Services, specifies the path where the business model files and Planning.ini file are stored. All other files are stored in the local directory.</td>
</tr>
<tr>
<td>INITINEASHAREDDIRECTORY</td>
<td>Specifies the path to the BusinessObjects Planning site’s shared directory. The path may include the trailing back slash ().</td>
</tr>
<tr>
<td>INITINEASKIPVERIFYSHAREDDIRECTORY</td>
<td>Specifies whether or not to verify the connection to the BusinessObjects Planning shared folder. 1=skip folder verification.</td>
</tr>
<tr>
<td>INITINEAODBCDATASOURCENAME</td>
<td>Specifies the name of the ODBC data source.</td>
</tr>
<tr>
<td>INITINEAODBCDRIVERNAME</td>
<td>Specifies the name of the ODBC driver to use.</td>
</tr>
</tbody>
</table>
## Customizing installations

### Overview

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAOBCTEMPLATE</td>
<td>Specifies the connection string parameters to use to connect to the database.</td>
</tr>
<tr>
<td>INITINEASKIPCREATEDSN</td>
<td>Specifies whether or not to skip the creation of a DSN. 1=skip DSN creation.</td>
</tr>
<tr>
<td>INITINEASKIPVERIFYDSN</td>
<td>Specifies whether or not to skip the verification of the DSN. 1=skip DSN verification.</td>
</tr>
</tbody>
</table>

**BusinessObjects Planning Excel Analyst**

The following table lists the configurable properties of the CartesisPlanningExcelAddIn.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning Excel Analyst.</td>
</tr>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
<tr>
<td>INITINEASKIPDIALOGS</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
</tbody>
</table>

**BusinessObjects Planning ODBO Provider**

The following table lists the configurable properties of the CartesisPlanningODBOProvider.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning ODBO Provider.</td>
</tr>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
</tbody>
</table>
### Customizing installations

#### Overview

**A**

The following table lists the configurable properties of the CartesisPlanningTestHarness.msi file.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>INITINEAMDACMINIMUMVERSION</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re-installed by the BusinessObjects Planning installation package.</td>
</tr>
<tr>
<td>INITINEAMDACPACKAGE</td>
<td>Specifies the fully-qualified path to the MDAC installation package (including file name). This path must be accessible to the target machine.</td>
</tr>
<tr>
<td>INITINEASKIPDIALOGS</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
<tr>
<td>INITINEAPROGRAMFILESDIRECTORY</td>
<td>Specifies where on the current machine to install BusinessObjects Planning Test Harness.</td>
</tr>
<tr>
<td>INITINEASETUPINIFILENAME</td>
<td>Specifies the path to the BusinessObjects Planning setup file.</td>
</tr>
<tr>
<td>INITINEASKIPDIALOGS</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
<tr>
<td>INITINEASILENTCONFIG</td>
<td>Specifies whether or not to display any of the configuration screens during installation. 1=do not display any screens.</td>
</tr>
<tr>
<td>INITINEASKIPFOLDERS</td>
<td>Specifies whether or not to perform the folder configuration. 1=skip folder configuration.</td>
</tr>
<tr>
<td>INITINEALOCALDIRECTORY</td>
<td>Specifies the path to where local copies of BusinessObjects Planning files are stored.</td>
</tr>
<tr>
<td>INITINEALOCALMACHINEDIRECTORY</td>
<td>On multi-user machines such as Citrix or Microsoft Terminal Services, specifies the path where the business model files and Planning.ini file are stored. All other files are stored in the local directory.</td>
</tr>
</tbody>
</table>
The CtpSetup.ini configuration file

The CtpSetup.ini file is the default configuration file for BusinessObjects Planning installations. The sample setup configuration file is found in the Site, INIFiles folder on the installation CD. You should copy this file to a location that is accessible to all your BusinessObjects Planning installation programs.

The following is a sample of what the CtpSetup.ini file looks like. Your actual file may be different depending on your configuration.

```
[Planning]
ProgramFiles=c:\Cartesis\Planning\Programs
LocalDirectory=c:\Cartesis
SharedDirectory=\Cartesis\CartesisShare
LocalMachineDirectory=
SkipFolders=
SkipVerifySharedFolder=

DataSourceName=StateBank
ODBCDriverName=SQL Server
SkipCreateDSN=
SkipVerifyDSN=

SilentConfig=

[Account:ServerAccount]
Account=core
Account2=

[Package:ExcelAddIn]
SkipDialogs=

[Package:Client]
SkipDialogs=DestinationDialog
SkipFeatures=Scheduler,-Web
IconsDisable=
MDACMinimumVersion=
MDACPackage=

[Package:Server]
Account=ServerAccount
SkipDialogs=
SkipFeatures=
MDACMinimumVersion=
MDACPackage=

[Package:Scheduler]
Account=
SkipDialogs=
MDACMinimumVersion=
MDACPackage=

[Package:WebServer]
SkipFeatures=
```
The CtpSetup.ini file has the following sections and parameters:

**Section [Planning]**

This section consists of configuration settings shared among all the installation packages and individual applications.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ProgramFiles</td>
<td>Specifies where BusinessObjects Planning applications are to be installed on client machines.</td>
</tr>
<tr>
<td>LocalDirectory</td>
<td>Specifies the path to where local copies of BusinessObjects Planning files are stored.</td>
</tr>
<tr>
<td>SharedDirectory</td>
<td>Specifies the path to the BusinessObjects Planning site’s shared directory. The path may include the trailing back slash ().</td>
</tr>
<tr>
<td>LocalMachineDirectory</td>
<td>On multi-user machines such as Citrix or Microsoft Terminal Services, specifies the path where the business model files and Planning.ini file are stored. All other files are stored in the local directory.</td>
</tr>
<tr>
<td>SkipFolders</td>
<td>Specifies whether or not to perform the folder configuration. 1=skip folder configuration.</td>
</tr>
<tr>
<td>SkipVerifySharedFolder</td>
<td>Specifies whether or not to verify the connection to the BusinessObjects Planning shared folder. 1=skip folder verification.</td>
</tr>
<tr>
<td>DataSourceName</td>
<td>Specifies the name for the BusinessObjects Planning data source. This name is used in the creation of ODBC connections. The details for the data source can be found in the [DSN:{DSN name}] section of the setup file.</td>
</tr>
</tbody>
</table>
Customizing installations

Overview

Section [Action:{account name}]

These sections consist of user account settings used to launch different BusinessObjects Planning applications as services. Each account section has a unique account name, which can be referenced by a BusinessObjects Planning installation package.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Specifies a user account to use to start the service. The value must be a user identifier and an optional domain name. The notation follows the [domain]identifier pattern.</td>
</tr>
<tr>
<td>Account2</td>
<td>Specifies the encrypted password for the account.</td>
</tr>
</tbody>
</table>

Package sections

The package sections consist of configuration settings that are relevant for the specific installation package. The following installation packages have configurable settings:

- BusinessObjects Planning Excel Analyst
- BusinessObjects Planning Client
- BusinessObjects Planning Server
- BusinessObjects Planning Scheduler (standalone version)
- BusinessObjects Planning Web Server
- BusinessObjects Planning Web Redirector
- BusinessObjects Planning Login Server
- BusinessObjects Planning ODBO Provider

Parameter Description

- ODBCDriverName Specifies an ordered comma-separated list of ODBC driver names. If the DSN has to be created (or re-created), the configuration utility will use this list to find the most appropriate ODBC driver installed on the workstation. The drivers listed first take precedence.
- SkipCreateDSN Specifies whether or not to skip the creation of a DSN. 1=skip DSN creation.
- SkipVerifyDSN Specifies whether or not to skip the verification of the DSN. 1=skip DSN verification.
- SilentConfig Specifies whether or not to display any of the configuration screens during installation. 1=do not display any screens.
ExcelAddIn

This section consists of configuration settings that are relevant for the BusinessObjects Planning Excel Analyst installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SkipDialogs</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
</tbody>
</table>

Client

This section consists of configuration settings that are relevant for the BusinessObjects Planning Client installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SkipDialogs</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. Applicable dialog box names are:</td>
</tr>
<tr>
<td></td>
<td>• DestinationDialog</td>
</tr>
<tr>
<td></td>
<td>• CustomDialog</td>
</tr>
<tr>
<td>SkipFeatures</td>
<td>Specifies a comma-separated list of feature names. The following notation should be followed:</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is in the list, it is visible in the Custom dialog but and not selected.</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is prefixed with a minus sign, the feature is not visible in the Custom dialog box and not selected.</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is not present in the list:</td>
</tr>
<tr>
<td></td>
<td>• If the installation is running in interactive mode, users can install and/or uninstall the feature at their discretion.</td>
</tr>
<tr>
<td></td>
<td>• If the installation is running in silent mode, the feature is selected.</td>
</tr>
<tr>
<td></td>
<td>The features that can be specified using this parameter are:</td>
</tr>
<tr>
<td></td>
<td>• BusinessObjects Planning Administrator</td>
</tr>
<tr>
<td></td>
<td>• BusinessObjects Planning Analyst Pro</td>
</tr>
<tr>
<td></td>
<td>• BusinessObjects Planning Scheduler</td>
</tr>
</tbody>
</table>
## Customizing installations

### Overview

This section consists of configuration settings that are relevant for the BusinessObjects Planning Server installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IconDisable</td>
<td>Specifies whether or not to disable Start menu icons for BusinessObjects Planning client applications. 1=disable icons.</td>
</tr>
<tr>
<td>MDACMinimumVersion</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re-installed by the BusinessObjects Planning installation package.</td>
</tr>
<tr>
<td>MDACPackage</td>
<td>Specifies the fully-qualified path to the MDAC installation package (including file name). This path must be accessible to the target machine.</td>
</tr>
</tbody>
</table>

### Server

This section consists of configuration settings that are relevant for the BusinessObjects Planning Server installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Specifies an account alias from the [Account:&lt;account name&gt;] section.</td>
</tr>
<tr>
<td>SkipDialogs</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. Applicable dialog box names are:</td>
</tr>
<tr>
<td>SkipFeatures</td>
<td>Specifies a list of features to not install. The only feature that can be specified using this parameter is BusinessObjects Planning Scheduler.</td>
</tr>
<tr>
<td>MDACMinimumVersion</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re-installed by the BusinessObjects Planning installation package.</td>
</tr>
<tr>
<td>MDACPackage</td>
<td>Specifies the fully-qualified path to the MDAC installation package (including file name). This path must be accessible to the target machine.</td>
</tr>
</tbody>
</table>

### Scheduler

This section consists of configuration settings that are relevant for the BusinessObjects Planning Standalone Scheduler installation package. The following configuration settings can be modified:
Customizing installations

Overview

Installations Guide 177

WebServer

This section consists of configuration settings that are relevant for the BusinessObjects Planning Web Server installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SkipFeatures</td>
<td>Specifies a comma-separated list of feature names. The following notations should be followed:</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is in the list, it is visible in the Custom dialog but not selected.</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is prefixed with a minus sign, the feature is not visible in the Custom dialog box and not selected.</td>
</tr>
<tr>
<td></td>
<td>• If the feature’s name is not present in the list:</td>
</tr>
<tr>
<td></td>
<td>• If the installation is running in interactive mode, users can install and/or uninstall the feature at their discretion.</td>
</tr>
<tr>
<td></td>
<td>• If the installation is running in silent mode, the feature is selected.</td>
</tr>
<tr>
<td></td>
<td>The features that can be specified using this parameter are: Adam/Website, WebGate</td>
</tr>
</tbody>
</table>

Web Redirector

This section consists of configuration settings that are relevant for the BusinessObjects Planning Web Redirector installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SkipDialogs</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. Applicable dialog box names are:</td>
</tr>
<tr>
<td></td>
<td>• DestinationDialog</td>
</tr>
<tr>
<td></td>
<td>• UserAccountDialog</td>
</tr>
<tr>
<td>Account</td>
<td>Specifies an account alias from the [Account:&lt;account name&gt;] section.</td>
</tr>
<tr>
<td>MDACMinimumVersion</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re- installed by the BusinessObjects Planning installation package.</td>
</tr>
<tr>
<td>MDACPackage</td>
<td>Specifies the fully-qualified path to the MDAC installation package (including file name). This path must be accessible to the target machine.</td>
</tr>
</tbody>
</table>
Overview

A section consists of configuration settings that are relevant for the BusinessObjects Planning Login Server installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SkipDialogs</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
</tbody>
</table>

**LoginServer**

This section consists of configuration settings that are relevant for the BusinessObjects Planning Login Server installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SkipDialogs</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
</tbody>
</table>

**ODBO Provider**

This section consists of configuration settings that are relevant for the BusinessObjects Planning ODBO Provider installation package. The following configuration settings can be modified:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SkipDialogs</td>
<td>Specifies a comma-separated list of dialog boxes to exclude from the installation. The only applicable dialog box name is DestinationDialog.</td>
</tr>
<tr>
<td>MDACMinimumVersion</td>
<td>Specifies the minimum version of MDAC. If the currently installed MDAC has a version lower than specified, MDAC will be re-installed by the BusinessObjects Planning installation package.</td>
</tr>
<tr>
<td>MDACPackage</td>
<td>Specifies the fully-qualified path to the MDAC installation package (including file name). This path must be accessible to the target machine.</td>
</tr>
</tbody>
</table>

**Section [DSN:....]**

This section consists of settings that are relevant for ODBC driver configuration and DSN creation. There can be multiple DSN sections, with each section name using the following syntax:

[DSN: <DSN_Name>, Driver: <driver_name>]

where <DSN_Name> is the name of the data source to connect to and <driver_name> is the name of the corresponding ODBC driver. (For example, [DSN: StateBank, Driver: Microsoft ODBC for Oracle] and [DSN: StateBank, Driver: Oracle ODBC Driver].) Each section must contain the
name-value pairs that are necessary to create the DSN connection to the data source when using the specified driver. You must assign the correct parameters for the driver to these sections.

Examples:

[DSN:StateBank,Driver:Oracle ODBC Driver]
ServerName=CtpServer
ResultSet=T
CloseCursor=F
LOBS=T

[DSN:StateBank,Driver:DataDirect for Oracle 4.2]
SID=INSRVR
PortNumber=1521
ArraySize=60000
UseCurrentSchema=1
Installing BusinessObjects Planning Web Redirector
Overview

BusinessObjects Planning Web Redirector is a component that is installed on top of a local BusinessObjects Planning Web site that handles all applet access locally, but redirects all authentication and business traffic to a central BusinessObjects Planning Web site.

BusinessObjects Planning Web Redirector is ideal for distributed locales that:

• Have a slow internet connection to the central site and don’t want the connection to be used up downloading applets or images.
• Don’t want a BusinessObjects Planning Gateway at their local site.
• Want authentication to be performed using the central Web site, thereby reducing additional administration and policy maintenance.
• Want a local Web site with minimal processing and maintenance requirements.

This section provides the information necessary to install BusinessObjects Planning Web Redirector. Specifically, this section provides information about:

• “Installing BusinessObjects Planning Web Redirector” on page 182
• “Configuring Internet Information Services (IIS) authentication” on page 183
• “Configuring BusinessObjects Planning Web Redirector” on page 184

Installing BusinessObjects Planning Web Redirector

This section explains how to install BusinessObjects Planning Web Redirector.

Note: For information on customizing your installation, “Customizing installations” on page 157.

To install BusinessObjects Planning Web Redirector:

1. Expand the WebRedirector folder on the installation CD or network share and run CartesisPlanningWebRedirector.msi.

   Warning: You cannot install from a mapped network drive if you are using Microsoft Terminal Services on Windows 2000 or earlier operating systems. You must either copy the installation package to the Terminal Services computer and run the installation from this location, or you must use the full universal naming convention (UNC) path to the installation package.

2. In the Welcome dialog box, click Next.
3. In the Destination Folder dialog box, accept the default installation path, or click Change to specify the path to where you want the BusinessObjects Planning Web Redirector to be installed.

**Note:** You cannot change the installation path if you already have a BusinessObjects Planning application installed on the machine.

4. In the Remote Website text box, type the URL of the BusinessObjects Planning central Web site.

5. Click Next.

6. In the Ready to Install the Program dialog box, click Install.

**Note:** If you receive any messages warning of the necessity to restart the World Wide Web Publishing Service, click Yes.

7. Click Finish.

**Configuring Internet Information Services (IIS) authentication**

Authentication through BusinessObjects Planning Web Redirector is configured through the Internet Information Service tool. The following authentication should be configured on each BusinessObjects Planning Web site:

- Local BusinessObjects Planning Web site—Anonymous authentication
- Central BusinessObjects Planning Web site—Basic authentication
Installing BusinessObjects Planning Web Redirector

Overview

**Note**: For information on configuring authentication in IIS, refer to the Microsoft IIS documentation.

**Warning**: “Basic Authentication” is used for Central authentication. Therefore it is recommended that Web site connection be secured using HTTPS.

For Web sites configured in this manner, when the first request is made to the central Web site using BusinessObjects Planning Web Redirector, it prompts for the user’s credentials. This information is entered by the user, passed to the local Web site, and then passed through to the central Web site which verifies the credentials. If the authentication succeeds, all incoming requests for the local BusinessObjects Planning Web site are forwarded to the central BusinessObjects Planning Web site.

**Note**: Authenticated user sessions should be cached to improve the performance of the authentication process; “Configuring BusinessObjects Planning Web Redirector” on page 184 for more information.

Configuring BusinessObjects Planning Web Redirector

The settings in the CtpWebConfig.ini file configure the BusinessObjects Planning Web Redirector. This file is created by the installation process and is in the `<install_dir>` folder.

You must configure the following settings in the [AuthenticationRedirect] section:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ProtectedResource</td>
<td>Identifies the local BusinessObjects Planning Web site. This must be specified using the local Windows path, for example, <code>c:\Cartesis\Planning\Programs\Webserver\Web</code>.</td>
</tr>
</tbody>
</table>
CacheCapacity Specifies the maximum number of authenticated user sessions that can be in the authentication cache. If the cache is greater than this value the expired items are deleted. If, after deletion, the cache value is still exceeded, no new user sessions will be created. The default value is 200. A value less than or equal to zero disables caching. Disabling caching will result in performance degradation.

CacheItemTimeout Specifies the time-out in minutes for items in the authentication cache. The default value is 20 minutes. A value less than or equal to zero disables caching. Disabling caching will result in performance degradation.

HTTPRequestTimeout Specifies the HTTP time-out in minutes. If a HTTP request exceeds the specified value, then the HTTP request fails with a time-out error. The default value is 60 minutes.
Testing the installation
You should test the installation to ensure that the BusinessObjects Planning Web site, BusinessObjects Planning Gateway, BusinessObjects Planning Application Server, and BusinessObjects Planning site can communicate with each other.

To test the installation:

1. From a workstation, open Internet Explorer 5.5 or greater.

2. Make sure that Sun® J2SE Runtime Environment 5.0 Update 9 is your default Java runtime environment. To do this, select Internet Options from the Tools menu and click the Advanced tab.

   **Note:** BusinessObjects Planning supports Sun J2SE Runtime Environment 5.0. To install Sun JRE, expand the Redistribute and JRE folders on the installation CD and follow the instructions in the readme.txt file. You cannot use BusinessObjects Planning Web applications while running Microsoft JVM.

3. Under the Java (Sun) heading, make sure that the **Use JRE 2 1.5.0_09 for <applet>** check box is selected.

4. Click OK.

5. Go to the following URLs:

   For BusinessObjects Planning Analyst:
Testing the installation

http://<CartesisPlanningWeb>/index.html
Replace <CartesisPlanningWeb> with the name of your Web site.
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