

# Oracle® Sales Analyzer

Installation and Upgrade Guide

Release 11*i*

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## Oracle Sales Analyzer Installation and Upgrade Guide, Release 11*i*

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Waltham, MA 02451-8720  
USA

If you would like a reply, please give your name, address, and telephone number below.

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If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

## What this manual is about

The *Installation and Upgrade Guide* describes how to install Oracle® Sales Analyzer (hereinafter referred to as “Analyzer”) on a server and set up a database on client PCs.

## Intended audience

This manual is intended for individuals who will be installing and working with Analyzer.

## Before you begin

Before you can use Analyzer, you must install the following:

- Microsoft Windows 95, Windows 98, or Windows NT 4.0 — See your Windows documentation for installation information.
- Express — This can be Oracle Express Server (hereinafter referred to as Express Server) release 6.3.2 or Personal Express release 6.3.2

For information about installing Express, see the appropriate version of the *Express Installation and Configuration Guide*.

## Related documentation

Other documentation related to Analyzer includes the following.

<b>Document</b>	<b>Description</b>
<i>Oracle Sales Analyzer Administrator's Guide</i>	Provides information for database administrators (DBAs) on how to install Analyzer on a remote platform, set up the databases, establish user access, and perform customizations.
<i>Oracle Sales Analyzer User's Guide</i>	Familiarizes users of Analyzer with its capabilities as a reporting and analysis system for on-line analytical processing (OLAP).
<i>Oracle Sales Analyzer Data Loader Guide</i>	Provides comprehensive information about the data loader program, and instructions for building an Analyzer database from data that is stored in flat files.
<i>Oracle Express Relational Access Manager User's Guide</i>	Provides instructions for using Relational Access Manager to create a data warehouse schema that is based on tables in a relational database management system. Also explains fundamental concepts pertaining to data warehouse design and optimization.
<i>Oracle Express Programmer's Guide to the Express Language</i>	Explains the Express programming environment and illustrates programming strategies for accessing and analyzing data.
<i>Oracle Express Language Reference Manual</i>	Explains the syntax and usage of the commands, functions, and options that make up the Express language.
<i>Express Installation and Configuration Guide</i>	Explains how to install and configure Oracle Express Server.
<i>Oracle Express SNAPI Guide</i>	Explains how to use SNAPI to create client applications that interact with an Express process running as a server.
<i>Oracle Express Database Administration Guide</i>	Explains how to configure existing Express databases for optimal use with Express Client products, and how to create new databases.

Document	Description
Help systems	Describe in a procedure-oriented format, most of the activities a user needs to perform. You can access Help in the following ways: <ul style="list-style-type: none"> <li>■ By choosing an option from the Help menu</li> <li>■ By pressing F1</li> <li>■ By choosing a <b>Help</b> command button</li> </ul>
Release Notes	Highlight information for this version of Analyzer, including release history, upgrade information, new features, product-specific functions, and known problems.

## Structure of this document

The *Installation and Upgrade Guide* is structured as follows:

- Chapter 1 details how to install the Analyzer server on a Windows NT or Unix platform and discusses the various methods you can use to provide Analyzer to users .
- Chapter 2 lists the software and hardware requirements for your PC and explains the choices that you will make as you run Oracle Universal Installer (hereinafter referred to as “Installer”). It then explains the installation procedure, describes how to create a database setup that allows you to access an Analyzer database, and discusses how to maintain an installation.
- Chapter 3 explains how to upgrade your installation of Analyzer from a previous version.

# Conventions

## Text conventions

You will find the following text conventions in this document.

Convention	Usage
<b>Boldface</b> text	Indicates menu items, command buttons, options, field names, and hyperlinks. Bold text is also used for notes and other secondary information in tables (for example, <b>Result</b> ).
Fixed-width text	Indicates folder names, file names, operating system commands, and URLs. Also indicates examples and anything that you must type exactly as it appears. <b>For example:</b> If you are asked to type <code>show eversion</code> , you would type all the characters exactly as shown in the fixed-width font.
<i>Italic</i> text	Indicates variables, including variable text. Variable text is used when dialog boxes or their components are unlabeled or have labels that change dynamically based on their current context. The wording of variable text does not exactly match what you see on your screen. Italic type is also used for emphasis, for new terms, and for titles of documents.
UPPERCASE text	Indicates Express commands and objects and acronyms.

## Mouse usage

Always use the left mouse button unless you are specifically instructed to use the right mouse button.

The term “left mouse button” refers to the dominant button. If you have reconfigured your mouse to reverse the functions of the left and right buttons, then you will need to use the reverse button when you follow the procedures in this manual.

## Formats for key combinations and sequences

Key combinations and key sequences appear in the following formats.

IF you see the format . . .	THEN . . .
Key1+Key2,	press and hold down the first key while you press the second key. <b>For example:</b> “Press Alt+Tab” means to press and hold down the Alt key while you press the Tab key.
Key1, Key2,	press and release the keys one after the other. <b>For example:</b> “Press Alt, F, O” means to press and release the Alt key, press and release the F key, then press and release the O key.

## Documentation Accessibility

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# Installing Analyzer on the Server

## Chapter summary

This chapter describes how to install Analyzer software on a Windows NT or Unix platform. The chapter also provides information about options for installing the Analyzer client on a LAN.

## List of topics

This chapter includes the following topics:

- Preparing to Install Analyzer on the Server
- Installing Analyzer on the Server
- Post-Installation Server Tasks
- Providing the Analyzer Client to Users

## Preparing to Install Analyzer on the Server

### Installing Express Server

Before installing Analyzer server software, you must install and configure Express Server running as a service on Windows NT or Unix.

During the installation of Express, you are asked to specify an Express Server DBA account, which includes a password (by default, OESDBA).

## Configuring one or more instances of Express Server

You can configure a single instance or multiple instances of Express from a single installation of Express. You can determine whether configuring a single instance or multiple instances best serves your objectives.

You may find that one instance of Express meets all of the needs of your site. For example, you might configure a single instance of Express for thin client access (via SNAPI), thick client access (via XCA), and Web server access (via Web Agent).

Alternatively, you might choose to configure multiple instances of Express, with a separate instance configured for a particular use. For example, you might configure a separate instance for Web server access, which is configured to allow a certain number of user sessions. Or, you might configure separate instances for thin client, thick client, and Web server access, in order to address varying degrees of user authentication and methods for establishing a Windows NT or Unix identity when connecting to Express.

When setting up a connection to a new instance of Express, be sure to verify that the database search path being used by this instance includes the locations of all databases required by Analyzer. You can edit the database search path by modifying the value of the ServerDBPath setting in the Express Configuration Manager. Or, within a given session, a user can override the ServerDBPath setting with the Express language option DBSEARCHPATH.

## Recommended and required configuration settings for Express Server

Various configuration settings for Express Server are required or recommended in order to provide optimal support of Analyzer. The following rules or guidelines apply:

- Express must be configured with the Persistent Session and Shell Command support modules.
- For access to a relational manager, Express must be configured with the SQL support module. When prompted to choose which relational system access options you want to use, choose ODBC, OCI, or both.
- For batch processing, Express must be configured for both SNAPI and XCA protocols.
- For access by thin client mode, Express must be configured as a SNAPI server (which provides RPC support).
- For access by thick client mode, Express must be configured as an XCA server.

- For access by a Web server, you must specify a value of NO for the RequirePasswordEncryption setting in Express Configuration Manager if you specify a Web security level value other than NONE for the RequiredSecurityLevel setting.
- The most stringent security measures can only be implemented for access by thin client mode; moderate security measures can be implemented for access by thin and thick client modes.
- For access by Web server, Express must be configured to support Express Web Agent. Express Web Agent and a Web listener (e.g., Apache Web Listener) must be installed.

## Establishing user access

You must ensure that Analyzer users have read-only access to all directories on the server where Express will create files. Administrative users require read/write access.

Users also require read/write access to unique user home directories. The user home directory contains the personal database that Analyzer creates to hold personal objects. The standard setup is to have a single user home for each user. Alternatively, you can use the .RDC file for a database to specify a root directory for user home directories. As described in the *Oracle Sales Analyzer Administrator's Guide*, individual user homes for the database then become subdirectories of the root.

**Important:** User IDs must be unique, and users should use their own IDs when logging into the database. Shared IDs or IDs that are not unique can cause problems with private objects.

## Related information

For detailed information about installing and configuring Express Server and Web Agent, as well as starting up Express Server, refer to the *Express Installation and Configuration Guide* for your operating system and the *Oracle Express Web Products Installation Guide*. The *Express Installation and Configuration Guide* also details issues related to user security and defining multiple instances of Express Server.

For detailed information about adjusting configuration settings for Express Server, refer to the Express Configuration Manager Help system.

For information about managing user environments in Windows NT, refer to the *Windows NT Server Concepts and Planning Guide*. For information about managing Unix user environments, see the documentation for your Unix system.

## Splitting an Analyzer Installation

### About split installations

You can distribute the functionality of Oracle Sales Analyzer server across more than one machine by installing the Oracle Sales Analyzer Server — Express Files component on one server and the Oracle Sales Analyzer Server — Web Files component on a different server.

### Requirements for splitting an Analyzer installations

The Oracle Sales Analyzer Server — Web Files component must be installed on the server where the Web listener is running.

After following the appropriate Analyzer installation procedure, follow the instructions in “Completing a Split Analyzer Installation” on page 1-15.

## Installing Single Sign-On

### About Single Sign-On

Single Sign-On is a CGI program that allows authenticated Oracle Self Service Application users to access Analyzer without additional security challenges.

### Requirements for installing single sign on

#### Install the Application Objects Library (AOL) patch

You must install a special Application Objects Library (AOL) patch for Analyzer. The patch will update Oracle Applications with Analyzer Single Sign-On metadata (roles, menus, functions, and so forth).

#### Single Sign-On location

During installation, you must select the Custom option on the Installation Types screen to install Single Sign-On.

You must be sure to install Single Sign-On on the same machine on which the Web server is installed.

### Implementing Single Sign-On

Single Sign-On requires that you also perform several implementation and setup tasks. These tasks include:

- Setting up users and responsibilities in Oracle Applications
- Setting up profiles in Oracle Applications
- Modifying the RDC file
- For a RAM database, configuring Relational Access Manager

### Related information

Refer to the *Oracle Sales Analyzer Administrator's Guide* for detailed information on implementing Single Sign-On for Analyzer.

## Installing Analyzer on the Server

### Using Installer

You use Oracle Universal Installer (hereinafter referred to as “Installer”) to install Analyzer server components and related products from a CD-ROM to a Windows NT or Unix platform. Following installation, you can use Installer for system maintenance, such as adding and removing Analyzer components.

### Procedure: Installing Analyzer on an NT server

To install and start Analyzer server software on an NT platform, follow these steps:

1. Insert the server installation CD-ROM into a CD-ROM drive.
2. Run Installer from `f:\setup.exe`, where “f” represents your CD-ROM drive.
3. On the Welcome screen, choose **Next**.
4. On the File Locations screen under **Destination**, enter or select the appropriate Oracle Home name and its full path, then choose **Next**.

**Note:** If you install multiple Analyzer installations on the same server, you must specify a unique Oracle Home for each installation.

5. On the Installation Types screen, specify the type of installation that you want to perform.
  - Typical option — Select this option to perform a typical installation, which consists of the Oracle Sales Analyzer server Express files and Web files on a single server
  - Custom option — Select this option if you intend to split this installation of Oracle Sales Analyzer server and/or you want to install Oracle OLAP Single Sign-On.

If you select the Typical option, proceed to Step 7.

6. If you selected the Custom option, use the Available Product Components screen to specify the components for this installation of Oracle Sales Analyzer server. The choices are:
  - Oracle Sales Analyzer Server — Express Files
  - Oracle Sales Analyzer Server — Web Files
  - Oracle OLAP Single Sign-On

**Important:** If you are performing a split installation of Analyzer, the Oracle Sales Analyzer — Web files component must be installed on the server where the Web server is installed.

**Important:** If you are performing a split installation of Analyzer, you must install Oracle OLAP Single Sign-On on the machine on which the Web server is installed.

7. If you selected the Oracle Sales Analyzer Server — Express Files component, Installer tries to determine if Oracle Express Server is installed. If Installer cannot find Express Server, it displays the Cannot Locate Oracle Express Server Installation screen.

If Oracle Express Server is installed, use the Path box to specify the full path of the Oracle Home under which Express Server is installed or use the **Browse** button to open the Choose Directory dialog box and choose the appropriate directory, then choose **Next** to continue. If Express Server is not installed, you must exit the installation and install Express Server before proceeding.

8. If you selected the Oracle Sales Analyzer Server — Web Files component, Installer displays the Oracle Express Web Agent Information screen. Use this screen to specify the name of the virtual directory that identifies the physical directory that contains the Express Web Agent executable file `OWWA.EXE`, then choose **Next**.

**Note:** If you are performing a split installation of Analyzer, replace the default `OWS-BIN` with the appropriate virtual directory (usually `CGI-BIN`).

9. If you selected the Oracle Sales Analyzer Server — Web Files component, Installer displays the Oracle Express Server Instance screen, specify the name of the instance of Express Server that you want to use, then choose **Next**.
10. If you selected the Oracle OLAP Single Sign-On component, Installer displays the CGI-Bin Virtual Directory screen. Use this screen to specify the location where the Oracle Express Web Agent Single Sign-On program is to be installed. This is the same path that is mapped to the CGI-Bin virtual directory in your listener configuration. Enter the full path of the location or use the **Browse** button to open the Choose Directory dialog box, in which you can choose the appropriate directory. When you are finished choose **Next**.
11. If you selected the Oracle OLAP Single Sign-On component, Installer displays the Specify FND\_TOP Path screen. Use this screen to specify the location of the FND\_TOP environment variable. This environment variable contains information about the directory where the appropriate database connection (.dbc) file currently resides or where a new database connection file will be created. Enter the full path of the location of the FND\_TOP environment variable in the Path box or use the **Browse** button to open the Choose Directory dialog box, in which you can choose the appropriate directory. When you are finished choose **Next**.
12. If one or more database connection (.dbc) files exist in the path specified in FND\_TOP, Installer prompts you to select an appropriate database connection file from a drop-down list or choose **new.dbc** to create a new file. When you are finished choose **Next**.
13. If you are creating a new database connection (.dbc) file, Installer prompts you for connection configuration information. This information includes:
  - **File Name** — Use this box to specify the name of the database connection file that you are creating.
  - **Connect String** — Use this box to specify the label in the tnsnames.ora file under which the information needed to connect to the RDBMS is to be stored (typically `TWO_TASK`).
  - **FNDNAM** — Use this box to specify the ID for the Application Objects Library (AOL) schema (typically `apps`).
  - **GWYUID** — Use this box to specify the Oracle User/Password combination of the public account to be used for initial Oracle Applications connection.

The GWYUID Oracle User must have Oracle Applications privilege level `Public`.

- **Server ID** — Use this box to specify the ID of the Applications server if Applications Server Security is enabled on this database. If Application Server Security is not enabled, this ID can be left blank.
  - **Guest Applications User** — Use this box to specify the Guest Applications User. The Guest Applications User is a public Applications user with no responsibilities assigned.
14. If you selected the Oracle OLAP Single Sign-On component, Installer displays the Applications Configuration screen. Use this screen to specify a networking protocol that is appropriate to your network. Your choices are:
- **MS-RPC** — (Remote Procedure Call) Used for NT-to-NT installations
  - **Remote Operations** — Used for Unix-to-NT installations
15. After selecting the appropriate protocol for your network, Installer prompts for connection settings.

If you selected MS-RPC as your protocol, enter the following information:

- **Service Name** — Use this box to specify the global database name for the instance of Express Server to which you want to connect.
- **Host** -- Use this box to specify the host DNS name or IP address for the remote system.
- **UUID** -- Use this box to specify the unique universal identifier (UUID) for a specific Express Server session if multiple instances of Express Server are running on the server.

If you selected Remote Operations as your protocol, enter the following information:

- **Service Name** — Use this box to specify the global database name for the instance of Express Server to which you want to connect.
  - **Host** — Use this box to specify the host DNS name or IP address for the remote system.
  - **RO Port** — Use this box to specify the port number of the Remote Operations Listener.
16. On the Summary screen, make sure that all of the specifications for the installation are correct, then choose **Install**.

Installer installs the products that you have selected.

17. On the End of Installation screen, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

## Procedure: Installing Analyzer on a Unix server

To install and start Analyzer server software on a Unix platform, follow these steps:

1. Log in as `oracle` or whatever user name owns the Oracle Home.
2. Insert the server installation CD-ROM into the CD-ROM drive.
3. To locate Installer, go to the installation directory and enter the following command at the command line:

```
./runInstaller /m
```

**Important:** You may need to set the environment variable `TERM` to `sun` in Solaris installations.

4. Make the `runInstaller` directory on the CD your current working directory.
5. Start Oracle Installer.

```
.x/runInstaller /m
```

6. On the Welcome screen, choose **Next**.
7. On the File Locations screen under **Destination**, specify the Oracle Home that you want to use, then choose **Next**.

**Note:** If you install multiple Analyzer installations on the same server, you must specify a unique Oracle Home for each installation.

8. On the Installation Types screen, specify the type of installation that you want to perform.
  - Typical option — Select this option to perform a typical installation, which consists of the Oracle Sales Analyzer server Express files and Web files on a single server
  - Custom option — Select this option if you intend to split this installation of Oracle Sales Analyzer server and/or you want to install Oracle OLAP Single Sign-On.

If you select the Typical option, proceed to Step 7.

9. If you selected the Custom option, use the Available Product Components screen to specify the components for this installation of Oracle Sales Analyzer server. The choices are:

- Oracle Sales Analyzer Server — Express Files
- Oracle Sales Analyzer Server — Web Files
- Oracle OLAP Single Sign-On

**Important:** If you are performing a split installation of Analyzer, the Oracle Sales Analyzer — Web files component must be installed on the server where the Web server is installed.

**Important:** If you are performing a split installation of Analyzer, you must install Oracle OLAP Single Sign-On on the machine on which the Web server is installed.

10. If you selected the Oracle Sales Analyzer Server — Express files component, Installer tries to determine if Oracle Express Server is installed. If Installer cannot find Express Server, it displays the Cannot Locate Oracle Express Server Installation screen.

If Oracle Express Server is installed, use the Path box to specify the full path of the Oracle Home under which Express Server is installed or use the **Browse** button to open the Choose Directory dialog box and choose the appropriate directory, then choose **Next** to continue. If Express Server is not installed, you must exit the installation and install Express Server before proceeding.

11. If you selected the Oracle Sales Analyzer Server — Web Files component, Installer displays the Oracle Express Web Agent Information screen. Use this screen to specify the name of the virtual directory that identifies the physical directory that contains the Express Web Agent executable file `OOWA.EXE`, then choose **Next**.

**Note:** If you are performing a split installation of Analyzer, replace the default `OWS-BIN` with the appropriate virtual directory (usually `CGI-BIN`).

12. If you selected the Oracle Sales Analyzer Server — Web Files component, Installer displays the Oracle Express Server Instance screen, specify the name of the instance of Express Server that you want to use, then choose **Next**.
13. If you selected the Oracle OLAP Single Sign-On component, Installer displays the CGI-Bin Virtual Directory screen. Use this screen to specify the location where the Oracle Express Web Agent Single Sign-On program is to be installed. This is the same path that is mapped to the CGI-Bin virtual directory in your listener configuration. Enter the full path of the location or use the **Browse**

button to open the Choose Directory dialog box, in which you can choose the appropriate directory. When you are finished choose **Next**.

14. If you selected the Oracle OLAP Single Sign-On component, Installer displays the Specify FND\_TOP Path screen. Use this screen to specify the location of the FND\_TOP environment variable. This environment variable contains information about the directory where the appropriate database connection (.dbc) file currently resides or where a new database connection file will be created. Enter the full path of the location of the FND\_TOP environment variable in the Path box or use the **Browse** button to open the Choose Directory dialog box, in which you can choose the appropriate directory. When you are finished choose **Next**.
15. If one or more database connection (.dbc) files exist in the path specified in FND\_TOP, Installer prompts you to select an appropriate database connection file from a drop-down list or choose **new.dbc** to create a new file. When you are finished choose **Next**.
16. If you are creating a new database connection (.dbc) file, Installer prompts you for connection configuration information. This information includes:
  - **File Name** — Use this box to specify the name of the database connection file that you are creating.
  - **Connect String** — Use this box to specify the label in the tnsnames.ora file under which the information needed to connect to the RDBMS is to be stored (typically TWO\_TASK).
  - **FNDNAM** — Use this box to specify the ID for the Application Objects Library (AOL) schema (typically apps).
  - **GWYUID** — Use this box to specify the Oracle User/Password combination of the public account to be used for initial Oracle Applications connection. The GWYUID Oracle User must have Oracle Applications privilege level `Public`.
  - **Server ID** — Use this box to specify the ID of the Applications server if Applications Server Security is enabled on this database. If Application Server Security is not enabled, this ID can be left blank.
  - **Guest Applications User** — Use this box to specify the Guest Applications User. The Guest Applications User is a public Applications user with no responsibilities assigned.

17. If you selected the Oracle OLAP Single Sign-On component, Installer displays the Applications Configuration screen. Use this screen to specify a networking protocol that is appropriate to your network. Your choices are:
  - MS-RPC — (Remote Procedure Call) Used for NT-to-NT installations
  - Remote Operations — Used for Unix-to-NT installations
18. After selecting the appropriate protocol for your network, Installer prompts for connection settings.

If you selected MS-RPC as your protocol, enter the following information:

- Service Name — Use this box to specify the global database name for the instance of Express Server to which you want to connect.
- Host -- Use this box to specify the host DNS name or IP address for the remote system.
- UUID -- Use this box to specify the unique universal identifier (UUID) for a specific Express Server session if multiple instances of Express Server are running on the server.

If you selected Remote Operations as your protocol, enter the following information:

- Service Name — Use this box to specify the global database name for the instance of Express Server to which you want to connect.
  - Host — Use this box to specify the host DNS name or IP address for the remote system.
  - RO Port — Use this box to specify the port number of the Remote Operations Listener.
19. On the Summary screen, make sure that all of the specifications for the installation are correct, then choose **Install**.

Installer installs the products that you have selected.

20. On the End of Installation screen, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

## Results of server installation

As a result of installing Analyzer server software, Express settings are modified as follows:

- The Express Server database path points to the Analyzer code databases.

- The `DSPRLOAD . INF` startup script is a preload file that resides in the `oracle_home\OLAP\xserver\COMMON` directory, where `oracle_home` is the Oracle Home directory and `xserver` is the Express Server directory (e.g., OES632). This file attaches relevant databases and loads database objects from disk into memory, thereby improving performance. `DSPRLOAD . INF` controls database preloading as follows:
  - If you have not installed a Web server, or if you have installed Analyzer more recently than Oracle Application Server, `DSPRLOAD . INF` controls the preloading of the Analyzer code databases.
  - If you have installed a Web server, and you have not installed Analyzer more recently than the Web server, `DSPRLOAD . INF` controls the preloading of both Web-related databases and the Analyzer code databases.

## Post-Installation Server Tasks

### Setting up Batch Manager for multiple instances of Express Server

Batch Manager is included in the typical installation of Express. If you have configured more than one instance of Express Server, you will want to set up Batch Manager to run with multiple Express instances.

The following procedure explains how to set up Batch Manager for an additional instance of Express Server.

1. Create a directory to hold a copy of the `BTM632` directory. For example, you could name the directory `BTM632_3`.
2. Copy the contents of the `BTM632` directory, including its subdirectories, to the new directory.
3. Locate the `DSBATCH . inf` and `DSBATCH . ini` files in the `SERVICE` subdirectory of your new directory.
4. Edit the `DSBATCH . inf` and `DSBATCH . ini` files in the new directory so that they refer to your new directory (for example, `BTM632_3`) instead of to the `BTM632` directory.
5. Using Oracle Express Configuration Manager, edit the following Initial Session parameters:
  - Set **WakeUpMilliseconds** to 1000.

- Set **WakeupSPLScript** to point to the `BATCH.inf` file in the new directory (for example, `BTM632_3/SERVICE/DSBATCH.inf`).
6. Restart the appropriate instance of Express Server.

## Creating the Analyzer databases

Once Express and Analyzer have been installed, then you can create a multi-dimensional OLAP database.

There are two options for defining a database:

- **Relational Access Manager** — Uses data that is stored permanently in an RDBMS defined through SQL. The RDBMS is accessed through a schema that you define through Relational Access Administrator, the graphical user interface to Relational Access Manager. Alternatively, you can use Relational Access Manager to create a hybrid database in which specific data is available on a permanent basis. For more information, see the *Oracle Express Relational Access Manager User's Guide*.
- **Data loader** — Loads data from flat files into variables that are stored permanently in Express. You set up files that describe your flat files and special programs to run. There is no graphical user interface. For more information, see the *Oracle Sales Analyzer Data Loader Guide*.

## Preloading databases to improve performance

Once you have built an Analyzer database, you can preload your remote Express databases (catalog, server, and public) from disk into memory, as follows.

IF you have configured . . .	THEN . . .
a single instance of Express for a single Analyzer database (e.g., “coffee”),	you can modify the script by adding commands to attach the remote Express databases before calling DS.PRELOAD.
multiple instances of Express for multiple Analyzer databases (e.g., “coffee” and “tea”),	you can copy an existing preload file (DSPRLOAD.INF or DSPLWEB.INF) and place a separate copy of the file in each database directory. Add your databases to the list in the file, making sure to insert the ATTACH statements for any databases that are to be attached read-only before the call to DS.PRELOAD. Then, point to the preload file for each instance of Express by specifying the path name in Express Configuration Manager (on the Session tab in the <b>Initial Session</b> category).

## Completing a Split Analyzer Installation

If you split this instance of Oracle Sales Analyzer server by installing the Oracle Sales Analyzer Server — Express Files component on one server and the Oracle Sales Analyzer Server — Web Files component on a different server, you must also complete the following tasks:

1. Copy the Express Web Agent executable file (OOWA.EXE for Windows NT installations or OOWARO for Unix installations) and configuration file (OOWA.CFG for Windows NT and OOWARO.CFG for Unix installations) from the Express OSA Server subdirectory labeled TOOLS to the physical directory specified by the CGI-BIN virtual directory.
2. Edit the copy of the Express Web Agent configuration file (OOWA.CFG for Windows NT and OOWRO.CFG for Unix installations) and replace the dummy entry at the end of the file with a line composed of the following elements:
  - Service name — The service name is typically the registered service name for an instance of Express Server, such as `EXPsrV632`.

- **Binding string** — The binding string uniquely identifies a service. It has the following format, although some parts might be omitted:

```
uid@transport:hostname[ endpoint]
```

For more information on the binding string and the Express Web Agent configuration file, refer to the *Oracle Express Web Products Installation Guide*.

3. You must define three virtual directories in your Web listener and map these to corresponding physical directories:

- **Directory for Analyzer Web Administrator** — Define the virtual directory **osadba** and map it to the appropriate physical directory, for example:

```
f:\orant\olap\osa631\dba
```

- **Directory for Analyzer user functions (Home page)** — Define the virtual directory **osaweb** and map it to the appropriate physical directory, for example:

```
f:\orant\olap\osa631\osaweb
```

- **Directory for Oracle Express Web Agent** — Define the virtual directory **oew-install** and map it to the appropriate physical directory, for example:

```
f:\orant\olap\oes631\owa631
```

For more information on configuring your Web listener, refer to the *Oracle Express Web Products Installation Guide* and your Web listener's documentation.

## Providing the Analyzer Client to Users

### Single-user installation

In a single-user installation, most of the files that Analyzer needs to run are installed on the user's PC.

There are two ways that users can install a single-user installation:

- Users can install Analyzer directly from the CD-ROM
- You can copy the contents of the CD-ROM to a directory on your LAN, and users can then run the installation from that LAN directory.

### Related information

For detailed information about using Installer for single-user client installations, refer to Chapter 2.

## Shared installations

With a shared installation, most of the files required by Analyzer reside on the network; only a minimal amount of storage on the user's PC is required.

In a shared installation, you install a set of Analyzer installation components to a common staging area on the network. This area is referred to as a *shared OLAP home*. Users can then access the shared OLAP home to install Analyzer on their PCs.

### Related information

For detailed information about using Installer for shared client installations, refer to Chapter 2.

## Procedure: Making a shared installation available to users

The following procedure describes how to make a shared installation available to users:

1. Insert the client installation CD-ROM into the CD-ROM drive, and start Installer by running `setup.exe` from the `f:\lan client` directory, where "f" represents the CD-ROM drive.
2. On the Welcome screen, choose **Next**.
3. On the File Locations screen under **Destination**, specify the Oracle Home that you want to use, then choose **Next**.
4. On the Available Product Components screen, select the product components that you want to make available to shared installation users, then choose **Next**.
5. On the Shared OLAP Home Location screen, specify the location on the network that you want to use as the shared OLAP home, then choose **Next**.

**Note:** The drive for the shared OLAP Home must be a mapped drive.

6. Depending on whether you selected Application Manager as one of the components to be included in the shared installation, do one of the following.

IF . . .	THEN . . .
you selected Application Manager,	proceed to Step 7.
you did not select Application Manager,	proceed to Step 9.

7. On the Application Manager Features screen, select any features that you want to enable for user installations. The features are as follows:

- **Permit access to databases on remote Express Server hosts** — Displays communications setups and allow them to be defined. If you do not select this feature, communications setups are not visible or available and the Remote Program field is not available in the Edit Configuration File dialog box.

**Note:** This option is equivalent to the AllowCommunications option in the APPMGR.INI file.

- **Permit editing of database configuration files** — Allows access to the Edit Configuration File dialog box from the Select Database Configuration dialog box. If you do not select this feature, access to the Edit Configuration File dialog box from the Select Database Configuration dialog box is not allowed.

**Note:** This feature is equivalent to the AllowConfigEdit option in the APPMGR.INI file.

- **Permit creation and updating of local slice databases** — Makes application-specific DBA menu options available through the Tools menu in Application Manager. If you do not select this feature, the application-specific DBA options are hidden.

**Note:** This feature is equivalent to the DisableDBA option in the APPMGR.INI file.

- **Permit saving of Express Server login user name and password** — Enables entry and saving of the user name and password in the Database Setup dialog box. If you do not select this feature, entry and saving of the user name and password in the Database Setup dialog box are disabled, and users are always required to enter login information at the time of login.

**Note:** This feature is equivalent to the LoginLogout option in the APPMGR.INI file.

8. On the General Application Features screen, select any features that you want to enable for user installations. The features are as follows:
  - **Permit access to the Express command window** — Displays the Express Monitor menu item under the Help menu, which allows Express to be accessed through a window. If you do not select this feature, the Express Monitor menu item is not displayed.

**Note:** This feature is equivalent to the PCXWindow option in the APPMGR . INI file.
  - **Prompt user for database user name** — The application will prompt the user for the database user name at startup. If you do not select this feature, the application will not prompt the user for the database user name.

**Note:** This feature is equivalent to the PromptForUID option in the APPMGR . INI file.

**Note:** The use of an Oracle Sales Analyzer user ID is being phased out. It is recommended that this feature not be selected.
  - **Hide typed text of database user name** — Conceals the typed user name with X's in the dialog for entering the database user name; this adds a level of security in controlling access to shared objects. If you do not select this feature, the typed user name is visible.

**Note:** This feature is equivalent to the HideUID option in the APPMGR . INI file.
9. On the Summary screen, make sure that all of the specifications for the installation are correct, then choose **Install**.

Installer performs the installation on the network.
10. The End of Installation screen appears. This screen informs displays the following information:
  - The file name and path information for the program that users must run when they perform the installation on their PCs.
  - The names of the text file in which Installer has saved the file name and path information for the installation program.

Note the file name and path information or the name of the installation summary text file (DBAMSG . TXT), because you will need to notify your users about the location of the installation program. Then choose **Exit** to close Installer.

## Providing multiple shared installations

When you provide shared installations for users, you have the option to provide different installation packages (that is, different product and component configurations) for different sets of users. You can specify a unique set of products and components for each installation package.

For each shared installation package that you want to create, follow the procedure in “Procedure: Making a shared installation available to users” on page 1-17, with the following stipulations:

- On the File Locations screen, you must specify a unique Oracle Home for each shared installation package.
- On the Shared OLAP Home Location screen, you must specify a unique shared OLAP Home for each shared installation package.

**Note:** For each installation package that you set up, users must install the entire set of products that you have specified for that package; they cannot choose individual products from the set that you have provided.

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# Installing Analyzer on the Client

## Chapter summary

This chapter describes the procedures you follow to install Analyzer software components on your PC, establish access to an Analyzer database, and maintain the installation.

## List of topics

This chapter includes the following topics:

- Comparison of Single-user and Shared Installations
- System Requirements
- Installation Options
- Installing the Software for a Single-user Installation
- Installing the Software for a Shared Installation
- Establishing Database Access
- Maintaining a Single-user Installation

## Comparison of Single-user and Shared Installations

### Single-user installation

In a single-user installation, Oracle Universal Installer (hereinafter referred to as “Installer”) copies files for the software applications that you choose to install from the CD-ROM into an `o1ap\osa631` subdirectory under your Oracle Home on your PC.

### Shared installation

In a shared installation, the database administrator (DBA) sets up an Oracle shared installation directory for Analyzer on the network and specifies the software applications and features that reside in this directory. Then, you use Installer to copy files containing Analyzer user settings to your PC or to your personal Oracle Home directory on the network. The icons map to the applications that the DBA has set up in the shared installation directory.

## System Requirements

### PC requirements

Your PC must meet the following requirements:

- Microsoft Windows 95, Windows 98, or Windows NT 4.0
- A CD-ROM reader
- A Windows-compatible monitor, VGA or higher resolution
- A Windows-compatible mouse

**Note:** Since Analyzer applications send output to the printer that you set up in Windows, consult your Windows documentation for specifics about printer setup.

### Communications requirements

The Analyzer installation on the PC communicates with Oracle Express Server (hereinafter referred to as “Express Server”) via SNAPI (Structured N-Dimensional Application Programming Interface). SNAPI uses Remote Procedure Calls (RPCs) to support client/server interaction.

If the workstation will access a server database, you must install TCP/IP support on the PC. TCP/IP is the network protocol used by SNAPI to communicate with Express Server. TCP/IP implementations are widely available.

## Thick client installation requirement

In thick client mode, Analyzer uses Personal Express Server on the PC to access metadata, fetch data from Express Server on the remote system, cache data locally on the PC, integrate catalogs in the public and personal databases, and perform many data calculations. Therefore, if you plan to run Analyzer in thick client mode, you must install Personal Express Server.

If you choose to install the files which are required for a thick client installation, Installer checks to see whether Personal Express Server is installed; if it is not installed, Installer issues a prompt that reminds you to install Personal Express Server.

## Web page access requirements

To access an Analyzer Web page, the PC must have one of the following browsers installed:

- Netscape Communicator, version 4.61 through 4.7.4. For version 4.61, SmartUpdate must be turned on.
- Microsoft Internet Explorer, version 4.01 through 5.0, with JVM 5.x.

The amount of disk cache that you specify for your browser can affect performance. A disk cache value equal to two percent of the capacity of the hard disk on your PC is recommended.

If your browser allows you to set a memory cache value, the settings shown in the following table are recommended.

IF your PC has . . .	THEN set the memory cache value to . . .
32MB or less RAM,	2MB
64MB RAM,	5MB
greater than 64MB RAM,	10MB

## Disk space requirements for a single-user installation

Before you install Analyzer, you should check to ensure that you have the required hard disk space available on the drive where your Oracle Home directory is located. If you do not have sufficient space to install the software components you want, you should make additional room on the installation drive before starting the installation.

The following table lists the approximate disk space requirements for the different installation types.

<b>Installation Types (with Included Software Components)</b>	<b>Required Disk Space (approximate)</b>
Typical Installation (includes Analyzer, Application Manager, SNAPI, and Oracle Universal Installer)	45MB
Complete Installation (includes Analyzer, Application Manager, Database Manager, thick client files, Global sample database, SNAPI, and Oracle Universal Installer)	115MB
Custom installation components:	
Analyzer	11MB
Application Manager	22MB
Database Manager	6MB
Global sample database	48MB
Thick client files	12MB
SNAPI (automatically included with Analyzer)	2MB

## Disk space requirements for a shared installation

In a shared installation, the Oracle shared installation directory for Analyzer is on the network. Installer copies files containing Analyzer user settings to the Oracle Home directory on your PC or to your personal Oracle Home directory on the network. A shared installation requires only 2MB on your PC.

## Installation Options

### Installation directory

Installer copies Analyzer files into an `olap\osa631` subdirectory under your Oracle Home. This subdirectory is referred to as the *installation directory*.

## Software application options for a single-user installation

During installation, Installer prompts you to select the software application options that you want to install. You can choose from three different types of installations, as described in the following table.

Installation Type	Software Installed
Typical	<p>This type of installation consists of the following components:</p> <ul style="list-style-type: none"> <li>■ Analyzer</li> <li>■ Oracle Sales Analyzer Application Manager — A utility for setting up databases</li> </ul> <p><b>Note:</b> SNAPI and Oracle Universal Installer are automatically included with the installation.</p>
Complete	<p>This type of installation consists of the following components:</p> <ul style="list-style-type: none"> <li>■ Analyzer</li> <li>■ Oracle Sales Analyzer Application Manager — A utility for setting up databases</li> <li>■ Oracle Sales Analyzer Database Manager — A utility for maintaining and customizing databases</li> <li>■ Thick client files — The files required for a thick client installation</li> <li>■ Global Electronics Sample Database — A sample sales database</li> </ul> <p><b>Note:</b> SNAPI and Oracle Universal Installer are automatically included with the installation.</p>
Custom	<p>This type of installation allows you to choose which of the following components you want to install:</p> <ul style="list-style-type: none"> <li>■ Analyzer</li> <li>■ Oracle Sales Analyzer Application Manager</li> <li>■ Oracle Sales Analyzer Database Manager</li> <li>■ Thick client files</li> <li>■ Global Electronics Sample Database</li> </ul> <p><b>Note:</b> SNAPI and Oracle Universal Installer are automatically included with the installation.</p>

## Software applications for a shared installation

When you perform a shared installation, Installer installs the software applications that the DBA has chosen for your installation.

## Language for the installation

You can install Analyzer in English or in any other language that is represented on the installation CD. To specify languages for the installation, choose Custom for the installation type and choose Product Languages on the Available Product Components page in Installer.

## Note: Web applications

Installer does *not* copy any special software to the PC for the Analyzer Web page. Access to the Analyzer Web page is established through the server as described in the *Oracle Sales Analyzer Administrator's Guide*. An individual user only needs to know the location (URL) of the Analyzer Web page and to have a supported Web browser.

# Installing the Software for a Single-user Installation

## Description of the installation process

Installer copies files for the software components that you want to install from the CD-ROM into an `olap\osa631` subdirectory under your Oracle Home on your PC.

The software components are accompanied by the following:

- Analyzer documentation in Adobe Acrobat Portable Document Format (.PDF)
- The Adobe Acrobat Reader installation program

As files are transferred from the CD-ROM to the disk, you will see a graphical representation of progress. As a result of the client installation, an Oracle Sales Analyzer program group is created in Windows.

## Preparing for installation

Before you run Installer, read “PC requirements” on page 2-2 to ensure that your PC meets the requirements for installing Analyzer.

Also ensure that you are ready to respond to the prompts for Oracle Home directory and software application options that Installer presents.

## Procedure: Performing a single-user installation

Use the following procedure to install Analyzer and related software applications:

1. Start Windows 95, Windows 98, or Windows NT. Ensure that no other applications are running.
2. Insert the client installation CD-ROM into the CD-ROM drive and start Installer by running `setup.exe` from the `f:\local client` directory, where “f” represents your CD-ROM drive.
3. On the Welcome screen, choose **Next**.
4. On the File Locations screen under **Destination**, specify the Oracle Home that you want to use, then choose **Next**.
5. On the Installation Types screen, select the type of installation you want to perform, then choose **Next**.
6. Depending on the installation type that you have chosen, do one of the following.

IF you chose . . .	THEN . . .
<b>Typical</b>	proceed to Step 8.
<b>Complete</b>	proceed to Step 8. <b>Note:</b> If you have not yet installed Personal Express, Installer issues a prompt that reminds you to install Personal Express after you have completed the Analyzer installation. Choose <b>Next</b> on the prompt screen to continue with the Analyzer installation.
<b>Custom</b>	proceed to Step 7.

7. If you selected **Custom** for the installation type, Installer displays the Available Product Components screen. Select the product components that you want to install from the list of components. Note that previously-installed components appeared as checked (selected) in the list; do *not* deselect these components unless you want to deinstall them.

The following requirements apply:

- Both Analyzer and Oracle Sales Analyzer – Database Manager require Oracle Application Manager (you cannot install Analyzer or Oracle Sales Analyzer – Database Manager without installing Oracle Application Manager).
- The sample Global database requires the thick client files (you cannot install the sample database without installing the thick client files).

If you want to specify the languages in which the installed products are to run, choose Product Languages to display the Language Selection screen, choose the languages for the installation, then choose **OK**. See “Language for the installation” on page 2-7 for further information about how to specify product languages.

After you have completed your selections on the Available Product Components screen, choose **Next**.

**Note:** If you choose to install the thick client files and you have not yet installed Personal Express, Installer issues a prompt that reminds you to install Personal Express after you have completed the Analyzer installation. Choose **Next** on the prompt screen to continue with the Analyzer installation.

8. On the Summary screen, make sure that the all of the specifications for the installation are correct, then choose **Install**.

Installer installs the products that you have selected.

9. On the End of Installation screen, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

## Checking the installation

After a successful installation, Installer creates a Windows icon for the installed Analyzer software applications. There may be icons for:

- Oracle Sales Analyzer
- Application Manager
- Database Manager
- Installing Adobe Acrobat Reader

Installer also creates icons that allow you to access online manuals that are associated with the applications that you installed. For example, if you installed Analyzer, there will be an icon for the *Oracle Sales Analyzer User’s Guide*.

## Related information

For information on installing Analyzer on the server, see Chapter 1.

# Installing the Software for a Shared Installation

## Description of the installation process

Installer copies Analyzer system files from the shared installation directory on the network to your personal Oracle Home directory on your PC or on the network.

As files are transferred from the shared Oracle Home directory to your personal Oracle Home directory, you will see a graphical representation of progress. As a result of the client installation, an Oracle Sales Analyzer program group is created in Windows.

## Preparing for installation

Before you run Installer, read “Shared installation” on page 2-2 to ensure that your PC meets the requirements for installing Analyzer.

## Procedure: Performing a shared installation

The following procedure describes the steps you follow to install Analyzer.

1. Start Windows 95, Windows 98, or Windows NT. Ensure that no other applications are running.
2. Map any available drive letter to the location of the `setup.exe` file that performs the shared installation.
3. Run the `setup.exe` file that performs the shared installation, as instructed by your database administrator.
4. On the Welcome screen, choose **Next**.
5. On the File Locations screen under **Destination**, specify the Oracle Home that you want to use, then choose **Next**.
6. On the Summary screen, choose **Install**.  
Installer performs the shared installation.
7. On the End of Installation screen, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

## Installing Adobe Acrobat Reader

The DBA can install Analyzer documentation in the Adobe Acrobat Portable Document Format (.pdf) in the `doc` subdirectory of the `osa` directory. To read this documentation, you must install Adobe Acrobat Reader on your PC.

You can install Adobe Acrobat Reader using the icon that has been created on your PC as part of the Analyzer installation.

## Checking the installation

After a successful installation, Installer creates a Windows icon for the installed Analyzer software applications. There may be icons for:

- Oracle Sales Analyzer
- Application Manager
- Database Manager
- Installing Adobe Acrobat Reader
- Related documentation

## Related information

This document describes the client installation only. For information on installing Analyzer on the server, see Chapter 1.

## Establishing Database Access

### General information

In order to use Analyzer, you must have access to an Analyzer database. You must also have a valid database setup.

### Analyzer database access

You may be using an Analyzer database that is on a remote server or on the PC. If the database is remote, you need system-level access rights to the database, and you must have either a user account on the server (with appropriate access rights) or a user account within a valid domain. Express Server and Analyzer must also be installed on the server.

### Definition: Database setup

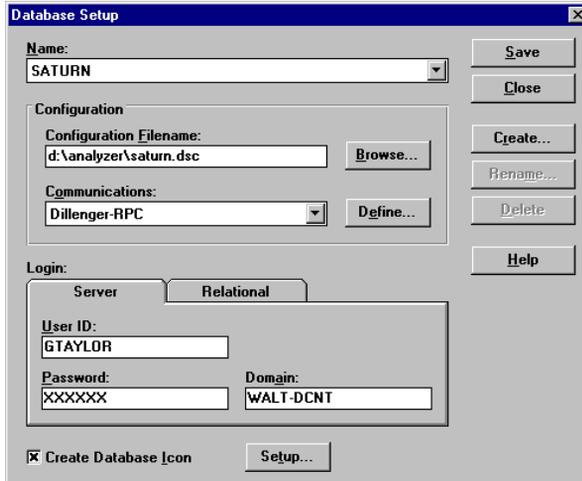
A *database setup* provides the information that the Analyzer client needs in order to locate and access files or data sets and open the database.

A database setup is a unique combination of components:

- A database configuration file
- For a remote database, a communications setup that identifies the communications path and type
- For a remote database, logins to remote systems
- A database icon specification (optional)

## Example: Database setup

You use Application Manager to create a database setup. The following figure shows a sample Database Setup dialog box for a remote database with login to the remote server.



## Procedure: Creating a database setup

The following procedure describes how to create a database setup.

1. In Windows, start Application Manager.
2. From the File menu, choose **Database Setup**.  
Result: The Database Setup dialog box appears.
3. Choose **Create** to define a new setup.  
Result: The Enter a New Database name dialog box appears.
4. Type a name for the database (up to 40 characters) and choose **OK**.  
Result: This returns you to the Database Setup dialog box, which now displays the name you entered.
5. In the Configuration box, choose **Browse** to select a configuration (.dsc) file that will allow you to access the database. If your database administrator has not

provided a configuration file, you must create one. See the *Oracle Sales Analyzer Administrator's Guide* for information about creating configuration files.

**Result:** The Select Database Configuration File dialog box appears listing the available database configuration files. If you installed the sample Global slice database, `globe.dsc` appears on the list. The other items in the list are configuration files that you have defined, or `.dsc` files that have been provided by the DBA.

6. If the database is remote, the Communications box is active. Select a communications setup from the list of available setups or choose **Define** to define a new communications setup.

**Note:** The available communications setups are setups that you have defined or setups that have been provided by the DBA.

7. For a remote database, you can specify information such as a password and ID, which may be required for login to the remote server or remote RDBMS. To do this, complete the active Login tabs.

**Note:** If you do not enter login information on the enabled tabs, you will be prompted for the required logins each time you open the database.

8. You can create a database icon that starts a specified application (for example, Analyzer or Database Manager) and opens the database automatically. Do one of the following.

IF . . .	THEN . . .
you want to create a database icon that starts Analyzer,	choose Setup and complete the fields in the Create Database Icon dialog box. Select Analyzer as the application to start.
you want to create a database icon that starts Database Manager,	choose Setup and complete the fields in the Create Database Manager Icon dialog box. Select Database Manager as the application to start.  Note: In this case, the communications type specified in the Communications Setup dialog box must be Thin Client.
you do not want to create a database icon,	clear the Create Database icon checkbox.

**Note:** If you installed Analyzer through a shared installation, your database administrator might have restricted your ability to perform some of the above tasks.

9. Choose **Save** to save the database setup.

## Procedure: Validating a database setup

The following procedure describes how to validate a new database setup for Analyzer:

1. In Windows, start Application Manager.
2. From the File menu, choose **Open**.

Result: The Open Database dialog box appears. It includes the database name you entered when you created the database setup.

3. Select the database and choose **OK**. If prompted for a user ID and password, enter the user ID and password for this database (as provided by your database administrator).

Result: The database opens successfully. You are now ready to use Analyzer.

## Related information

If you are a DBA or group leader, you require detailed information on establishing database access and creating database setups. See the *Oracle Sales Analyzer Administrator's Guide* for more information.

Also see the following topics in the Application Manager Help system:

- “Creating Configuration Files”
- “Creating Database Icons”
- “Defining Communications Setups for Thick Client Mode and a Network Connection”
- “Defining Communications Setups for Thin Client Mode and an RPC Connection”
- “Defining Database Setups”
- “Editing Configuration Files”

## Maintaining a Single-user Installation

### Installer maintenance functions

You can use Installer to perform the following maintenance functions for a single-user installation:

- Remove installed applications
- Add software applications

### Procedure: Removing software applications

The following procedure describes how to remove Analyzer applications from an existing single-user installation. The instructions assume that you already know how to start Installer:

1. Start Installer.
2. On the Welcome screen, choose **Deinstall Products** to display the Inventory screen.
3. The Inventory screen lists all products that are currently installed. If you need to expand an entry in the list, you can do so by clicking on the drill icon to the left of the product name.

To select a product for deinstallation, click on the box next to the product name. When you click on the box, a check mark appears in the box, indicating that the product is selected for deinstallation.

4. After you have selected any products that you want to deinstall, choose **Remove**.

Installer displays the Confirmation screen, which lists all of the products that you have chosen for deinstallation. If you do not want to deinstall the listed products, choose **No** to cancel the deinstallation; otherwise, choose **Yes** to deinstall the products.

After you choose **Yes**, Installer deinstalls the selected products and displays the Inventory screen again. You can select other products for deinstallation at this point, or you can choose **Close** to exit from the Inventory screen.

## Procedure: Adding software applications

The following procedure describes how to add Analyzer applications to an existing single-user installation. The instructions assume that you already know how to start Installer:

1. Start Installer.
2. On the Welcome screen, choose **Next**.
3. On the File Locations screen under **Destination**, specify the Oracle home where you want to add software applications, then choose **Next**.
4. On the Installation Type screen, select **Custom**, then choose **Next**.
5. Installer displays the Available Product Components screen. Select the product components that you want to install from the list of components.

The following requirements apply:

- Both Analyzer and Oracle Sales Analyzer – Database Manager require Oracle Application Manager (you cannot install Analyzer or Oracle Sales Analyzer – Database Manager without installing Oracle Application Manager).
- The sample Global database requires the thick client files (you cannot install the sample database without installing the thick client files).

After you have completed your selections on the Available Product Components screen, choose **Next**.

**Note:** If you choose to install the thick client files and you have not yet installed Personal Express, Installer issues a prompt that reminds you to install Personal Express after you have completed the Analyzer installation. Choose **Next** on the prompt screen to continue with the Analyzer installation.

6. On the Summary screen, make sure that the all of the specifications for the installation are correct, then choose **Install**.

Installer installs the products that you have selected.

7. On the End of Installation screen, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

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# Upgrading Analyzer

## Chapter summary

This chapter describes how to upgrade from earlier versions of Oracle Sales Analyzer to Oracle Sales Analyzer 11*i*

## List of topics

This chapter includes the following topics:

- Upgrading Software
- Converting Databases

## Upgrading Software

### Upgrading software on the PC

Analyzer 11*i* is installed by the Oracle Universal Installer program that installs Analyzer on the PC as part of an integrated suite of Oracle products.

If you are installing an Oracle product for the first time on your PC, you can choose any drive and directory for your “Oracle home” directory.

Analyzer, and other Oracle products you install on your PC will be installed into this Oracle home directory. Existing releases of Analyzer 1.2 through 1.7.*x* may be left on your PC and remain usable after having installed Analyzer 11*i*.

The Oracle Universal Installer program will not recognize an existing release of Analyzer releases 1.2 through 1.5.*x* and therefore cannot be used to remove those releases of Analyzer. If you want to remove those releases of Analyzer, you must do so manually by deleting the files and directories after backing up your personal

databases. The Oracle Universal Installer program will recognize installations subsequent to 1.5.x but will not remove them. If you want to remove those releases of Analyzer, you should do so by using the older Oracle Installer program (not to be confused with Oracle Universal Installer program) after backing up your personal databases.

It is advisable that you backup \*.INI, \*.DSC, and \*.DB files prior to installing a newer version of Analyzer.

### Procedure: Using Netscape SmartUpdate during an upgrade from Analyzer 6.2.1

The following procedure should be used when performing a Netscape SmartUpdate if you are currently using Analyzer 6.2.1 on the Web and are updating to Analyzer 11i.

1. Close all Netscape Communicator pages
2. Backup your copy of NSREG.DAT located in your Windows install directory.
3. Start Netscape
4. Uninstall Analyzer 6.3 using the SmartUpdate section in the Advanced category of the Preferences dialog in the Edit menu of Netscape.
5. Clear both the Memory Cache and Disk Cache using the Cache section in the Advanced category of the Preferences dialog in the Edit menu of Netscape.
6. Enter the URL for the Analyzer 11i user page and press **Enter**. When the user home page appears, press **Start Analyzer** for the desired database, and follow the onscreen directions for the SmartUpdate

### Procedure: Using Netscape SmartUpdate during an upgrade from Analyzer 6.3

The following procedure should be used when performing a Netscape SmartUpdate if you are currently using Analyzer 6.3 on the Web and are updating to Analyzer 11i.

1. Close all Netscape Communicator pages
2. Start Netscape
3. Enter the URL for the Analyzer 11i user page and press **Enter**. When the user home page appears, press **Start Analyzer** for the desired database, and follow the onscreen directions for the SmartUpdate

## Upgrading software on the server

Analyzer 11*i* is installed by the Oracle Universal Installer program which installs Analyzer on the server as part of an integrated suite of Oracle products. If you are installing an Oracle product for the first time on your server, you can choose any drive and directory for your “Oracle home” directory. Analyzer, and other Oracle products you install on your server will be installed into this Oracle home directory. Existing releases of Analyzer 1.2 through 1.7.*x* may be left on your server and remain usable after having installed Analyzer 11*i*.

The Oracle Universal Installer program will not recognize an existing release of Analyzer releases 1.2 through 1.5.*x* and therefore cannot be used to remove those releases of Analyzer. However the older Oracle Installer program (not to be confused with Oracle Universal Installer program) should still be on your machine and can be used to remove those releases of Analyzer.

The Oracle Universal Installer program will recognize installations subsequent to 1.5.*x* that were installed by Oracle Universal Installer but will not be able to remove them. If you want to remove those releases of Analyzer, you should do so by using the Oracle Universal Installer after backing up your databases.

It is advisable that you backup all \*.DB and \*.RDC files prior to installing a newer version of Analyzer.

## Converting Databases

### Procedure: Upgrading PC stand-alone (“slice”) mode databases

Analyzer 11*i* uses the new Personal Express Server (PEX) 6.3.2, which is not compatible with those earlier versions of Personal Express.

To upgrade slice databases that were created under Personal Express 5.0.3 or earlier, follow these steps:

1. Export the slice database and any personal databases to EIF files
2. Using Personal Express 6.3.2, import these EIF files into Personal Express 6.3.2 databases that have the same names.
3. Using Application Manager for Analyzer 11*i*, create a Database Setup for the newly imported Personal Express 6.3.2 slice database where the Access Mode for the slice database in the Configuration File is set to “Slice read/write.”
4. Start up Analyzer against the existing slice database. Analyzer converts the database to release 11*i*.

To upgrade slice databases created under versions of Personal Express after 5.0.3 but prior to 6.3.2, follow these steps:

1. Using Application Manager for Analyzer 11*i*, create a Database Setup for the newly imported Personal Express 6.3.2 slice database where the Access Mode for the slice database in the Configuration File is set to “Slice read/write.”
2. Start up Analyzer against the existing slice database. Analyzer converts the database to release 11*i*.

**Note:** To maintain the connection between the pre-converted slice database and the remote database from which it was created, you must copy the dbsetup.ini and comsetup.ini files from their location in the earlier Analyzer installation to the appropriate location in the Analyzer 11*i* installation.

## LAN mode databases

LAN mode databases are no longer supported in Analyzer 11*i*. A technical note is available from support that explains how to convert a LAN database to a server database.

## Server mode databases

Databases used with Analyzer 1.2.1 and later can be upgraded for use with Analyzer 11*i*. The migration from releases prior to Analyzer 1.6 on the server is different from previous upgrades in that databases created for Analyzer using releases of Express prior to 6.3.2 cannot be directly accessed with Express Server 6.3.2. In order to use existing Express 4.x and 5.x databases with Express Server 6.3.2, it is necessary to export the database objects into EIF files (Express Interchange Format) and to then import them into a database created with Express Server 6.3.2. For thick client connections, the shell database should not be converted. It will be recreated automatically under Analyzer 11*i*.

## Upgrading data loader databases from Analyzer 1.6.x and later

We recommend server databases from Analyzer release 1.6 to 6.3.x be converted by running your normal data update procedure with the Analyzer 11*i* code. If converting outside of your normal update cycle, you can run the conversion by performing the update without a reference to data files in the metafile and format file.

Note that for data loaded databases, the Express option `_UPDATEOLDVERS` must be set to `YES` during the conversion update. This option can be set using an Express `INFILE` to run the update.

### **Procedure: Upgrading data loader databases from Analyzer 1.5.x**

Follow the steps in this table to upgrade a database from Oracle Sales Analyzer 1.5.x.

1. Back up all databases.
2. Export each of the Express 5.0.x server databases (including personal DBs) to EIF files
3. Using Express Server 6.3.2, recreate the databases (including personal DBs), using the same names, on the server and import the contents of each of the EIF files. The personal databases on the server need to be located in the user's home directory
4. Convert up by running your normal data update procedure with the Analyzer 11i code. If converting outside of your normal update cycle, you can run the conversion by performing the update without a reference to data files in the metafile and format file.

### **Procedures: Upgrading data loader databases from Analyzer 1.3.x and prior**

Follow this procedure to upgrade a data database from Analyzer 1.3.x and prior.

1. Export each of the Express 4.x.x or 5.x.x server databases to EIF files.
2. Using Express Server 6.3.2, create databases with the same names, in the appropriate location on the server and import the contents of each of the EIF files
3. Convert up by running your normal data update procedure with the Analyzer 11i code. If converting outside of your normal update cycle, you can run the conversion by performing the update without a reference to data files in the metafile and format file.

Follow the steps in this table to upgrade the users' personal databases from Analyzer 1.3.x and prior.

1. Delete each user's personal database on the server. These personal databases are incomplete copies of the user's personal database on the PC and do not need to be backed up

2. Using Personal Express 4.x.x or 5.x.x, export each user's personal database on their PC from their Analyzer 1.x.x user directory to an EIF file
3. Using Personal Express Server, create personal databases with the same name in their [Oracle home directory]\OLAP\OSA631 directory. Import the contents of the personal EIF file into this database.
4. Each user should initially open the server database in thick client mode in order to create a new personal database in their user directory on the server. This personal database will be automatically converted up when it is opened. The database may be opened in thin client mode in later sessions

## Upgrading Relational Access Manager databases

An upgrade procedure must be performed on a Relational Access Manager database when that database is to be used with a newer version of any application such as Analyzer. This upgrade can be submitted through a maintenance procedure in Oracle Express Relational Access Administrator. A Relational Access Manager build, using the latest code, must be run against the earlier databases in order to upgrade them properly. Refer to the *Oracle Express Relational Access Manager User's Guide* for more information.

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