ACTIVE Governance™

Installation Guide for Windows Platform

Software Version 7.1

LogicalApps®

Restricted Rights Legend

Logical Apps Provides on-site support as well as remote phone and web support to ensure quick and effective product implementation. To request support, to suggest product enhancements, or to comment on Logical Apps software or documentation, send email to support@logicalapps.com, or contact us at the address or phone number given below.

Document Version

8/10/06

Logical Apps
15420 Laguna Canyon, Suite 150
Irvine, CA 92618
949.453.9101

Contents

Preface

The ACTIVE Governance Installation Guide covers requirements and detailed instructions on the entire Installation Process for the ACTIVE Governance platform.

Intended Audience

This guide is intended for users who are comfortable running some system administration operations such as making OS level configuring changes, creating users and granting various permissions to the user and directories. In addition it may require installing operating system patches on the machine where ACTIVE Governance will be hosted.

Chapter 1

ACTIVE Governance Installation

Overview

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

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

Active Governance requires storage space on a relational database. In addition, Business Objects requires storage space on a relational database for storing its Content Management Store (CMS).

Installation Requirements

Supported Windows Versions

Supported operating systems include the following:

Windows Server 2000 family. Required minimum operating system install plus Service Pack 4 (SP4).

Windows Server 2003 family. Required minimum operating system install plus Service Pack 1 (SP1).

Minimum Hardware Requirements

Active Governance Application Server should have at least

- 32bit Intel/AMD Chipsets only
- 2 GB of RAM (4 GB recommended)
- Single Hyperthreaded CPU/Dual CPU (preferred) 2.5 GHz or faster
- 70 GB Hard Disk Space on mirrored SCSI disks, a minimum 8 GB should be reserved for the STAGE directory

Active Governance Platform requirements for database

- Database: 500 MB of storage for tables for ACTIVE Governance middleware solution. Note: This excludes the Oracle Embedded component requirements.
- 2 GB of disk space reserved for temporary data generated by SOD analytics

Minimum Software Requirements

- Databases for ACTIVE Governance should be one of the following
  - Oracle 9i – Preferred*
  - Oracle 8i – Supported
  - My SQL 4.1.10a – Supported
- Application Server
  - Apache Tomcat 5.0 (bundled with Install) - Preferred
  - Apache Tomcat 5.5 - Supported
  - OracleAS 10G rel 3 - Supported
  - JBoss 4.0 - Supported
- BO Content Management Database
  - Oracle 9i – Preferred*

- MSDE – (If Oracle 9i database is not available)

- Web Browser
  - Internet Explorer 6.0 – Preferred*
  - Internet Explorer 5.5 - Supported
- Utility Software
  - Database Connectivity: Oracle 9i Client Software(9.2 client)
  - Unzip utility: Software to unzip ".zip" and ".tar.gz" files (E.g. winrar)
  - Latest version of MDAC (available from the Microsoft download site)
- Oracle Applications Versions:
  - 11.5.3-11.5.7 - Supported
  - 11.5.8 – Preferred*
  - 11.5.9 – Preferred*
  - 11.5.10 – Preferred*

***Preferred** indicates that the product is developed and certified in this platform

Active Governance Architecture on Windows

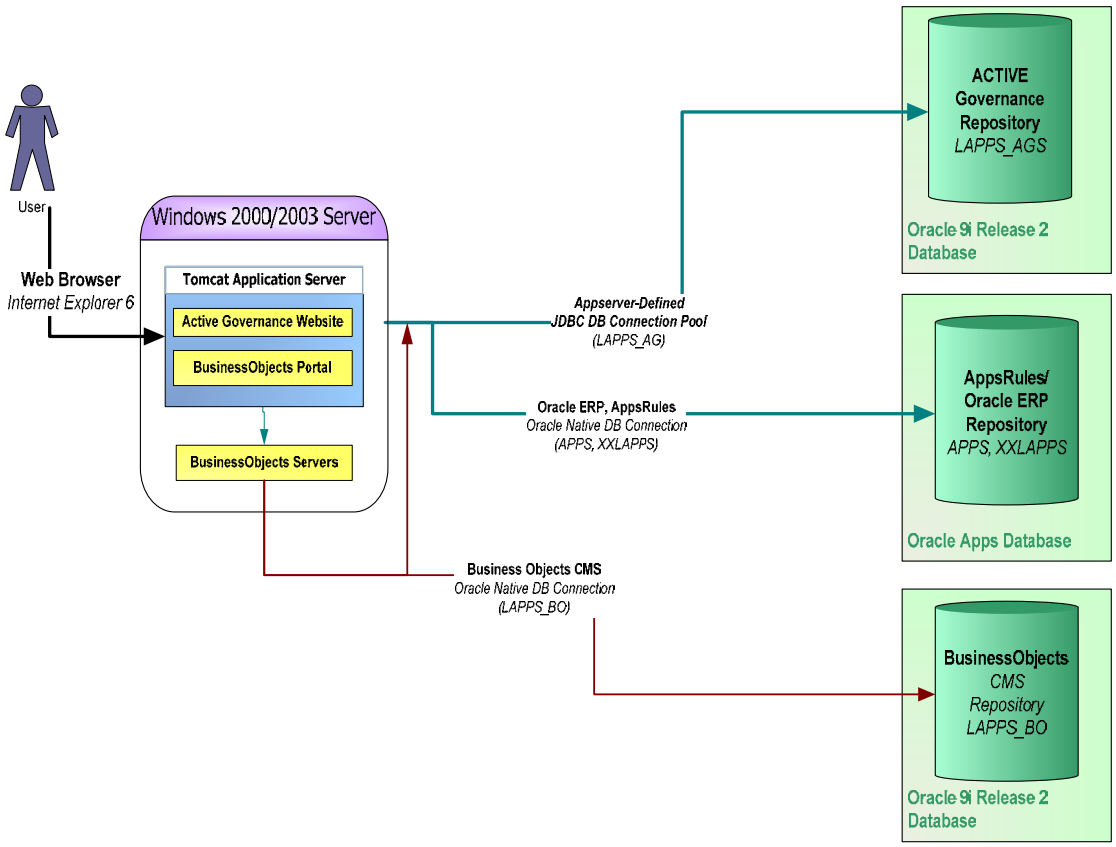
Deployment Configuration – Oracle Database as storage

This section details the Active Governance middleware architecture using the Oracle Database to store the Active Governance middleware repository (Oracle 8i or 9i database).

The Business Objects Content Management Store is also stored on an Oracle 9i database. If a Oracle 9i database is not available, the Business Objects data store will be stored in a MSDE database which can be installed using the Business Objects installer.

Architecture Diagram – AG and BO CMS DB on Oracle

Active Governence Middleware
Installation Option – Windows, Oracle



Preparing to Install

This section describes the pre-installation steps that need to be carried out before installing Active Governance

Install Pre-requisite

1. Procure a server that meets the minimum hardware requirements as described in the previous section. Ensure that the minimum RAM and Disk Space requirements have been met
2. Ensure that appropriate OS level configurations and minimum software requirements have been met as described in the previous section.
3. On the Windows Server, create a user for LogicalApps. It is recommended to create a user **'lapps'**. This user must be the local Windows Administrator on the machine. Once the user has been created, login as **lapps** to perform the rest of the installation tasks. Navigate to *Administrative Tools and choose Computer Management.* User the Users programs to create the user.
4. Ensure that this machine does not have Business Objects installed. LogicalApps installs the OEM version of Business Objects XI and requires a clean machine without any prior history of Business Objects installations.
5. LogicalApps software require the following ports:

   6400 – Business Objects

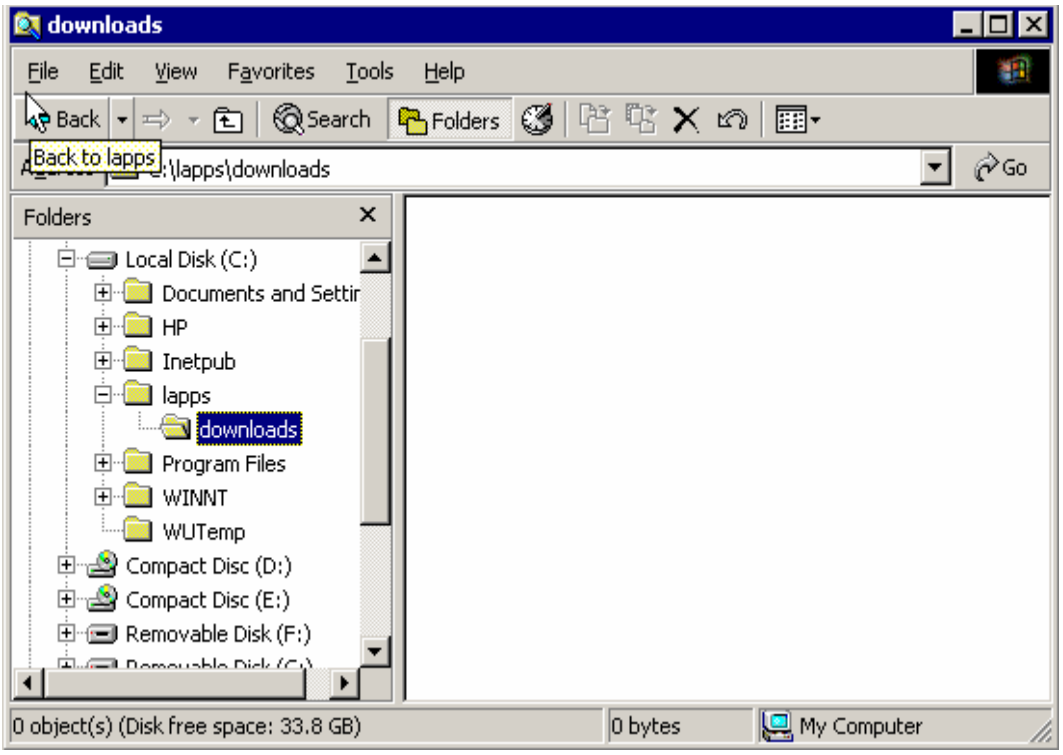
   8080 – Tomcat Web Server

   8005 – Tomcat Shutdown port

   8443 – SSL
6. Please have the SMTP Server details that are used by organization for sending emails. ACTIVE Governance needs this to send emails.
7. Oracle Data Governor must be installed on all the Production Oracle E-Business instances and the connection information must be available for every instance of Oracle Data Governor installed. Please refer to the Installation Guide for Oracle Data Governor for details.
8. Windows Server 2000 SP4 has Internet Explorer 5.0 installed by default. Please navigate to http://download.microsoft.com and download the Internet Explorer 6 browser. Please download the latest version of IE6.
9. Windows Server 2000 SP4 does not have any Unzip utility built into the Operating system. Please download winrar from www.rarlabs.com for use during the installation process.

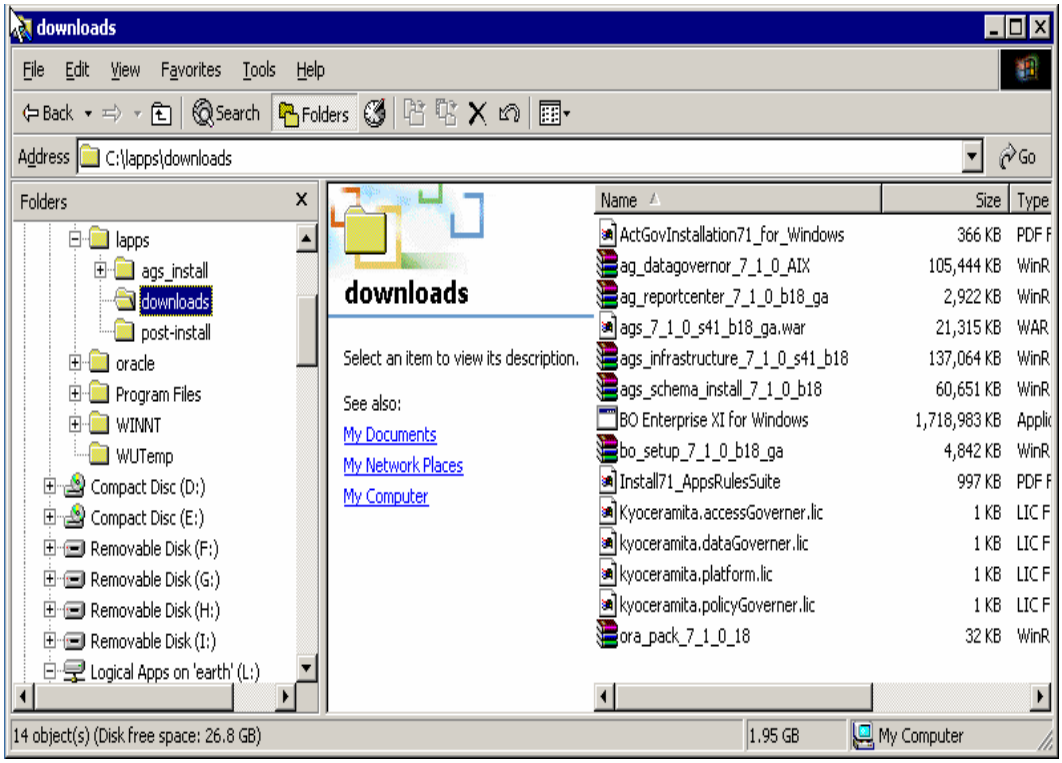
Stage the LogicalApps Distribution

1. Create a staging folder called C:\LAPPS. Navigate to that folder and create a folder called downloads.



2. Download the Business Objects installation files into this folder. Open Internet Explorer 6, type in the provided FTP URL's on the address bar. When prompted, Save the files to the C:\LAPPS\downloads folder.

3. Download the ACTIVE Governance platform installation packages to C:*LAPPS**downloads* folder. This will copy the following folders into the folder.



4. Navigate to *C:\LAPPS\downloads* folder and Extract the *ag_infrastructure_buildid.zip* to *C:\LAPPS* folder. The *C:\LAPPS\post-install* folder is created.
5. Navigate to *C:\LAPPS\downloads* folder and extract the *ags_schema_install_buildid.*zip to *C:\LAPPS* folder. *C:\LAPPS\ags_install* folder will be created and will contain all the maven and the schema creation scripts.
6. Copy the *C:\LAPPS\ags_<buildid>.war* file to *C:\LAPPS\ags.war.*

Install Oracle Client

Oracle Client needs to be installed on the server that hosts ACTIVE Governance in order for this application to connect to the various Oracle Databases. This includes the database that has the AG schema (assuming it is installed on Oracle) and the database that has the Oracle Data Governor schema. If one does not exist please install the Oracle Client. Please refer to Oracle Client Installation Guide for further details on installation.

The post-install directory under the STAGE directory contains a file called tnsnames.ora.

Edit this file and replace the value of host, dbport and dbsid with the appropriate values for connections to the ACTIVE Governance database and the Oracle Data Governor database. Copy the contents of that file and append it to the tnsnames.ora in your ORACLE_HOME.

Perform this step for Windows Server 2003 SP1 ONLY

Business Objects Services do not start after installation because Windows 2003 Service Pack 1 installs a new feature called Data Execution Prevention (DEP). DEP is a set of hardware

and software technologies that perform additional checks on memory to help prevent malicious code from running on a system.

To add services to the DEP feature:

1. Right-click 'My Computer' and click 'Properties'.

2. Under the 'Advanced' tab in the 'Performances' section, click 'Settings'.

3. Under the 'Data Execution Prevention' tab click the 'Add' button.

==========

NOTE:

You will not see the DEP tab if Service pack 1 is not installed.

==========

4. Add the name of the services executable file (EXE). Make sure the box is check marked.

Installing ACTIVE Governance – Oracle Database

Create Oracle Users

Ensure that the database SID information is entered in TNSNAMES.ORA file. This file is located in C:\ORACLE_CLIENT_HOME\network\admin folder. Two Oracle users have to be created in the Oracle database slotted for Active Governance platform.

Invoke SQL Plus and login to the database instance as SYSTEM. Create these two user-ids

LAPPS_AG – Schema for the Active Governance Content

LAPPS_BO – Schema for the Business Objects Content Management Store

Use these SQL Plus commands to create the users:

create user LAPPS_AG identified by LAPPS_AG;

create user LAPPS_BO identified by LAPPS_BO;

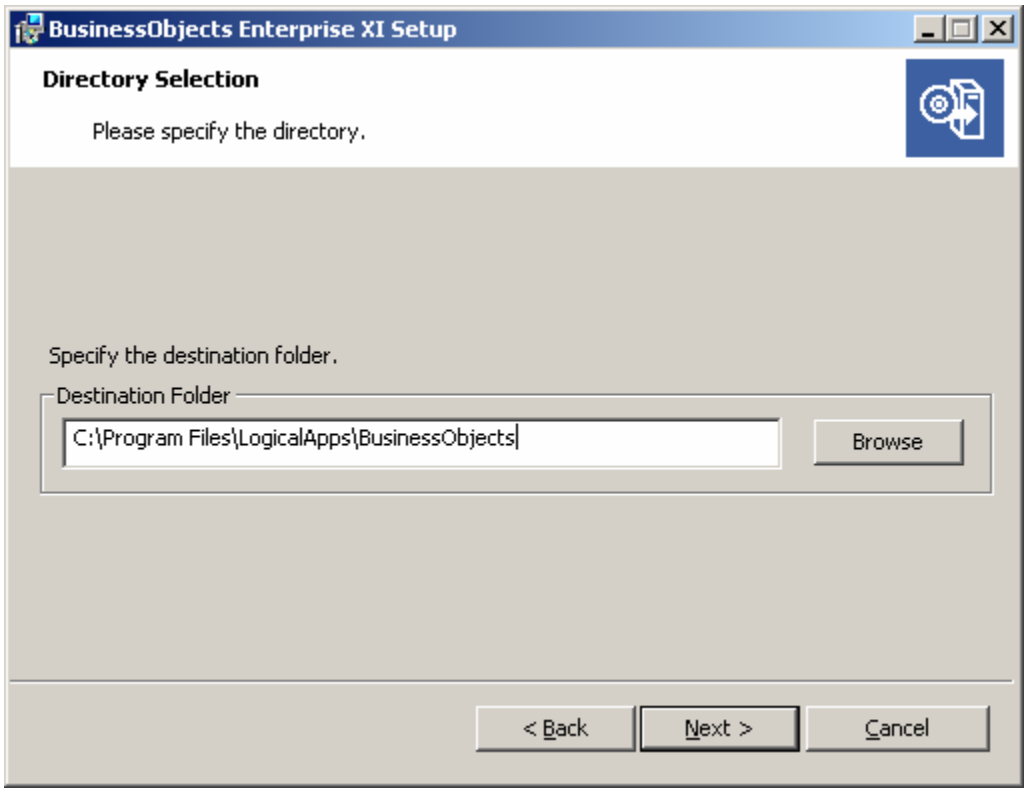
grant connect, resource to LAPPS_AG, LAPPS_BO;

Install Business Objects

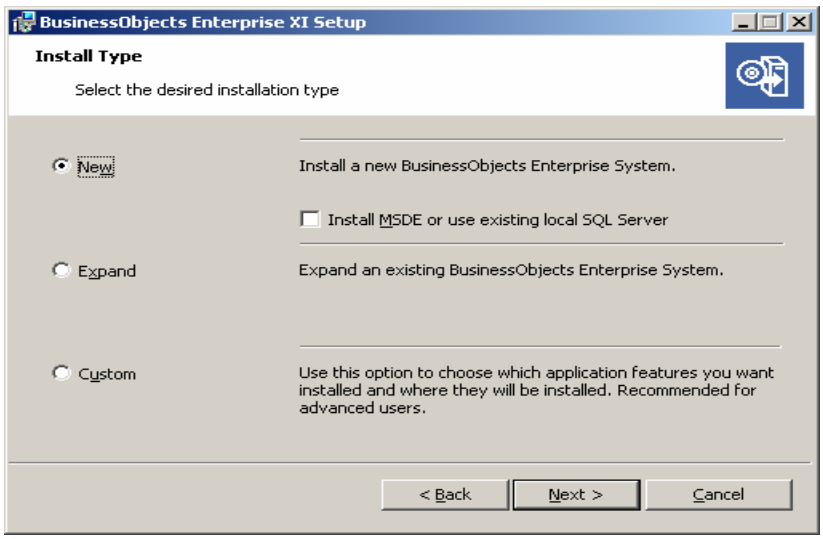
1. Reboot the Windows machine and login as **lapps.**
2. Create the C:\Program Files\LogicalApps\Tomcat folder.
3. Navigate to *C:\LAPPS\downloads* folder and extract the Business Objects installer by Invoking the *BOEXI_MLBCD1.zip, BOEXI_MLBCD2.zip and BOEXI_MLBCD3.zip*. When prompted for an unzip location, enter the folder *C:\LAPPS_STG\BOE-XI-MLB* on the prompt text box. This self-extracting installer will extract the install file to the *C:\LAPPS_STG\BOE-XI-MLB* folder. The Business Objects Setup.exe automatically launches after the unzip extraction is complete. NOTE: You can manually start the installation process by running setup.exe from the *C:\LAPPS_STG\BOE-XI-MLB\win32* folder.
4. When you start the installation, the Microsoft Windows Installer may need to be installed or upgraded on the local machine. If so, the Wise Installation Wizard performs the necessary modifications and prompts you when finished. Click Yes to restart the machine and resume the installation automatically.
5. In the Select Client or Server Installation dialog box, choose Perform Server Installation.
6. Proceed through the Setup program's dialog boxes and follow the instructions on the screen until you reach the License Key dialog. Please enter the name of your company and the License key provided along with the software.
7. Click Next to get to the Default Installation folder prompt screen of the installation. The folder specified here will be used for installing the Business Objects and the Tomcat servers. Please enter the location specified below:

   C:\Program Files\LogicalApps\Business Objects

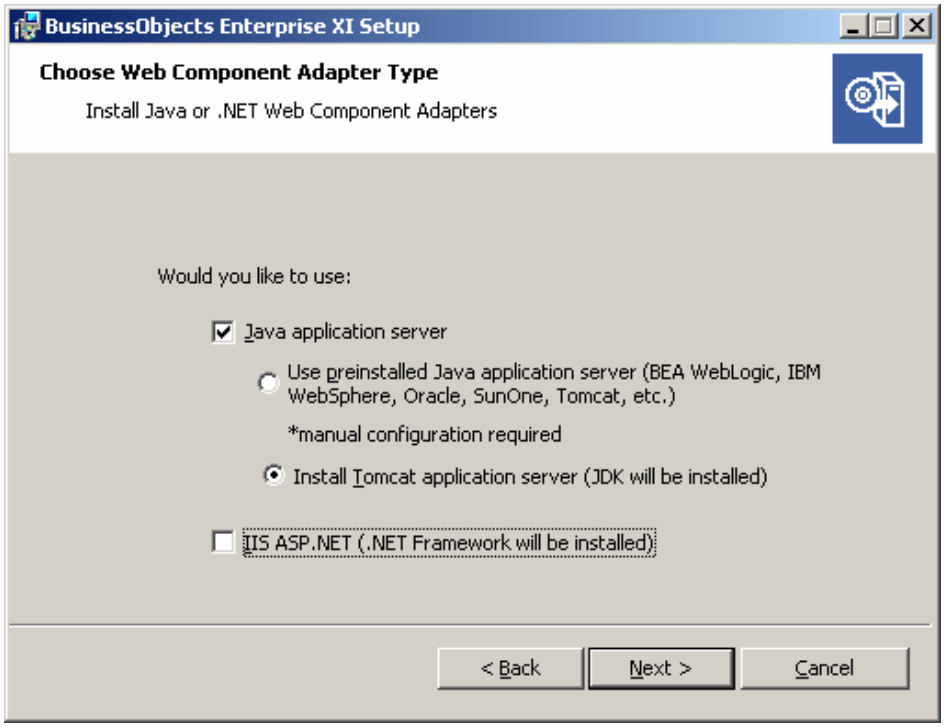
Although a different folder can be chosen, please use the convention mentioned in this document as this location serves as a central store for the entire LogicalApps Programs. Maintenance also becomes easier.



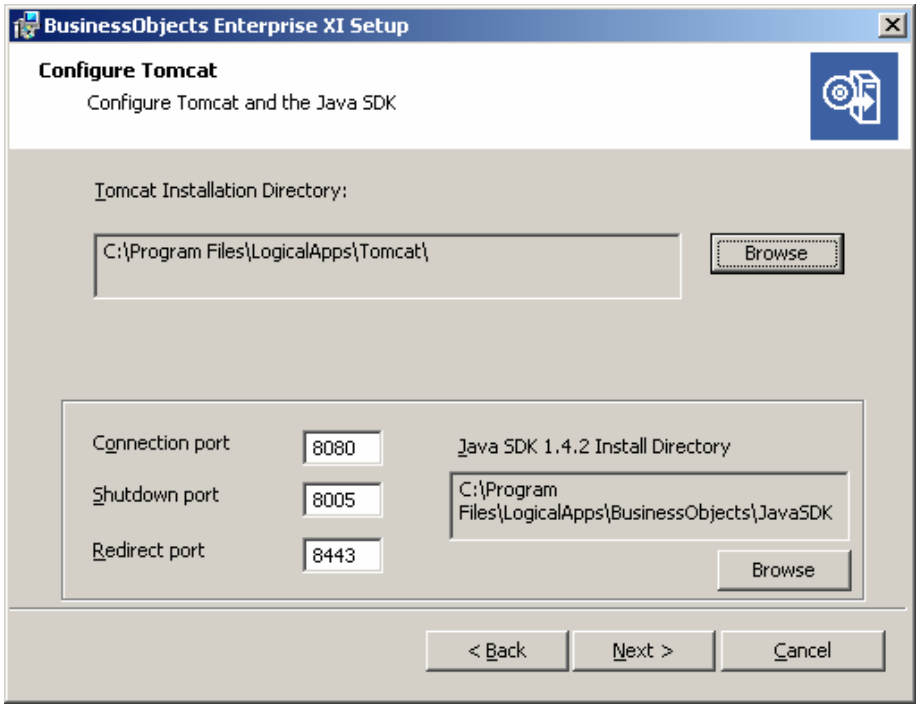
8. Clicking Next will display the prompt screen for storing the Common Files used by Business Objects. Please enter the folder *C:\Program Files\LogicalApps\Common Files\BusinessObjects\3.0*. These common files are also used by Business Objects products such as Crystal Reports or OLAP Intelligence.
9. The Setup program now proceeds to the Installation Type dialog box.
10. Click New. Ensure that the Checkbox for Install MSDE is unchecked.



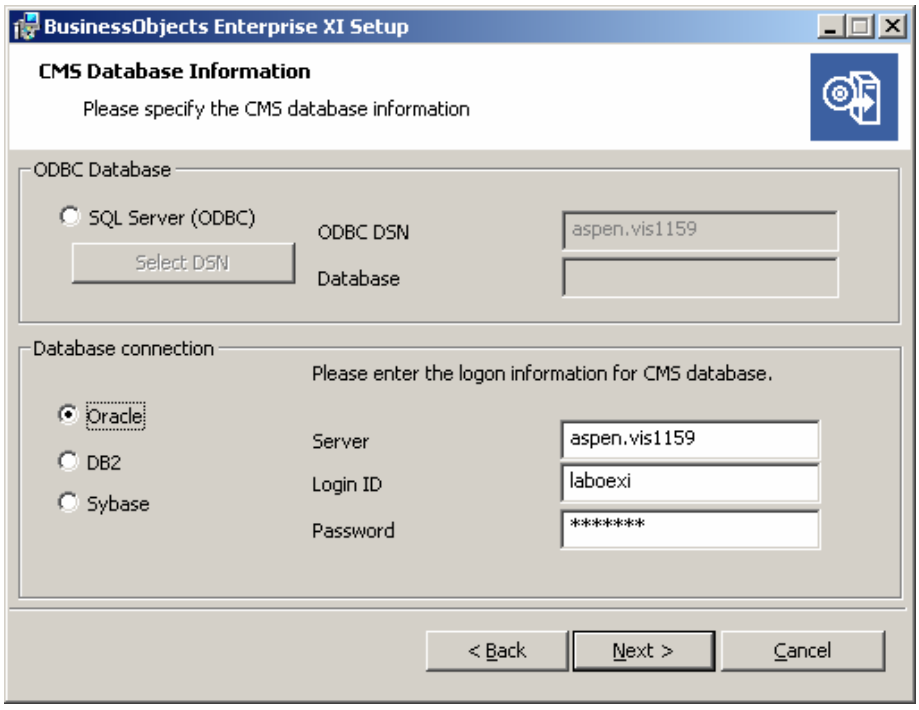
11. Click Next and In the Choose Web Component Adapter Type dialog box, select the *Java Application Server* and *the Install Tomcat Application Server*. Java SDK will also be installed when this option is chosen.



12. On clicking Next, the Configure Tomcat dialog box appears. Use the default numbers provided. Also change the Tomcat Installation directory to *C:\Program Files\LogicalApps\Tomcat* then click Next.



13. Clicking Next will display the Content Management Store (CMS) creation dialog box. Select Oracle as the database and enter the Oracle Database Service name (as entered in TNSNAMES.ORA). Enter the user name LAPPS_BO and password for this user. The CMS database will be created under the schema LAPPS_BO.



14. Click Next to continue installing the Business Objects software. After the installation is complete, the Registration dialog box will be displayed. Enter the Registration

number made available to you. Click on Finish to complete the Business Objects installation.

Configuring Tomcat for JAVA Heap sizes

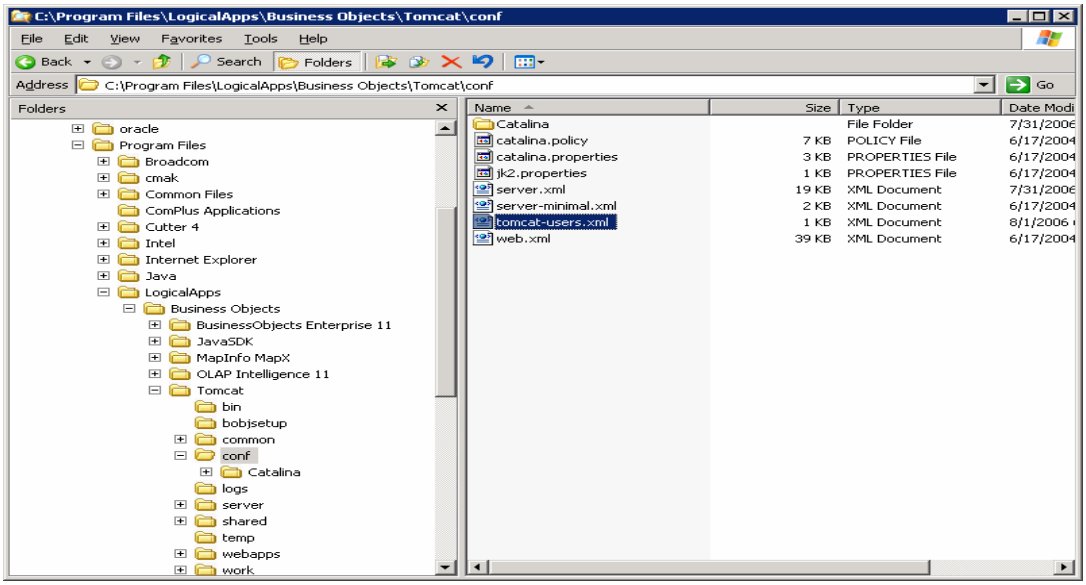
The Business Objects installer can install Tomcat as a Windows service. The installer does not, however, give you the option of setting the Java runtime options, and as noted above, the service is not started through the catalina.bat job, so the service runs with the default 64 MB heap allocation.

Perform the following steps to uninstall the Tomcat service and re-install the service with the desired JVM parameters.

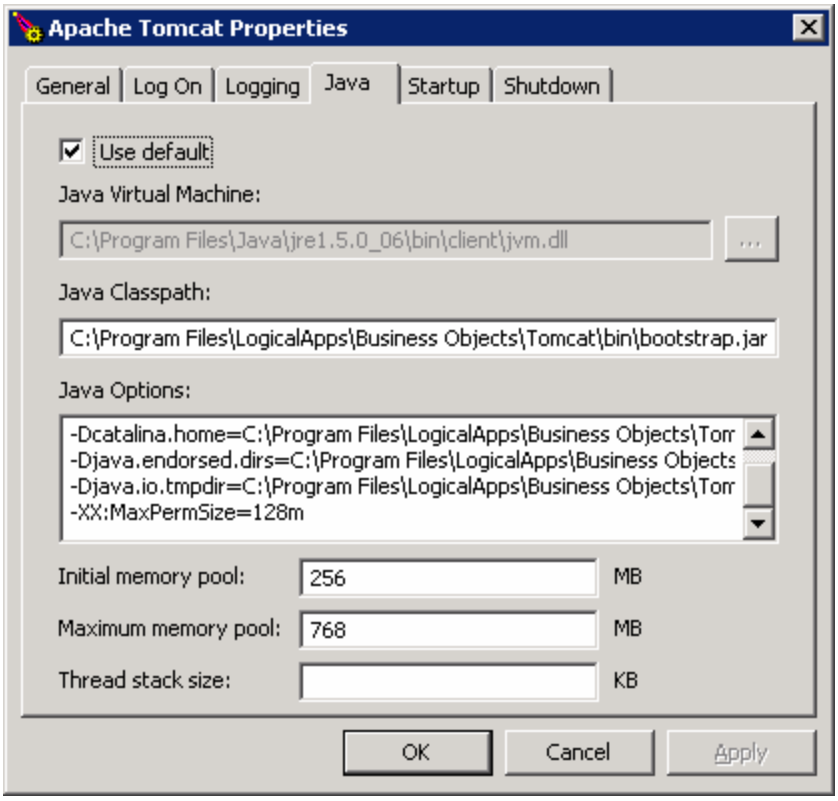
1. Replace the contents of the file C:\Program Files\LogicalApps\Tomcat\conf\tomcat-users.xml with the following content:

```
<?xml version='1.0' encoding='utf-8'?>
<tomcat-users>
  <role rolename="tomcat"/>
  <role rolename="role1"/>
  <role rolename="manager"/>
  <user username="tomcat" password="tomcat" roles="tomcat"/>
  <user username="both" password="tomcat" roles="tomcat,role1"/>
  <user username="role1" password="tomcat" roles="role1"/>
  <user username="admin" password="admin" roles="manager"/>
</tomcat-users>
```

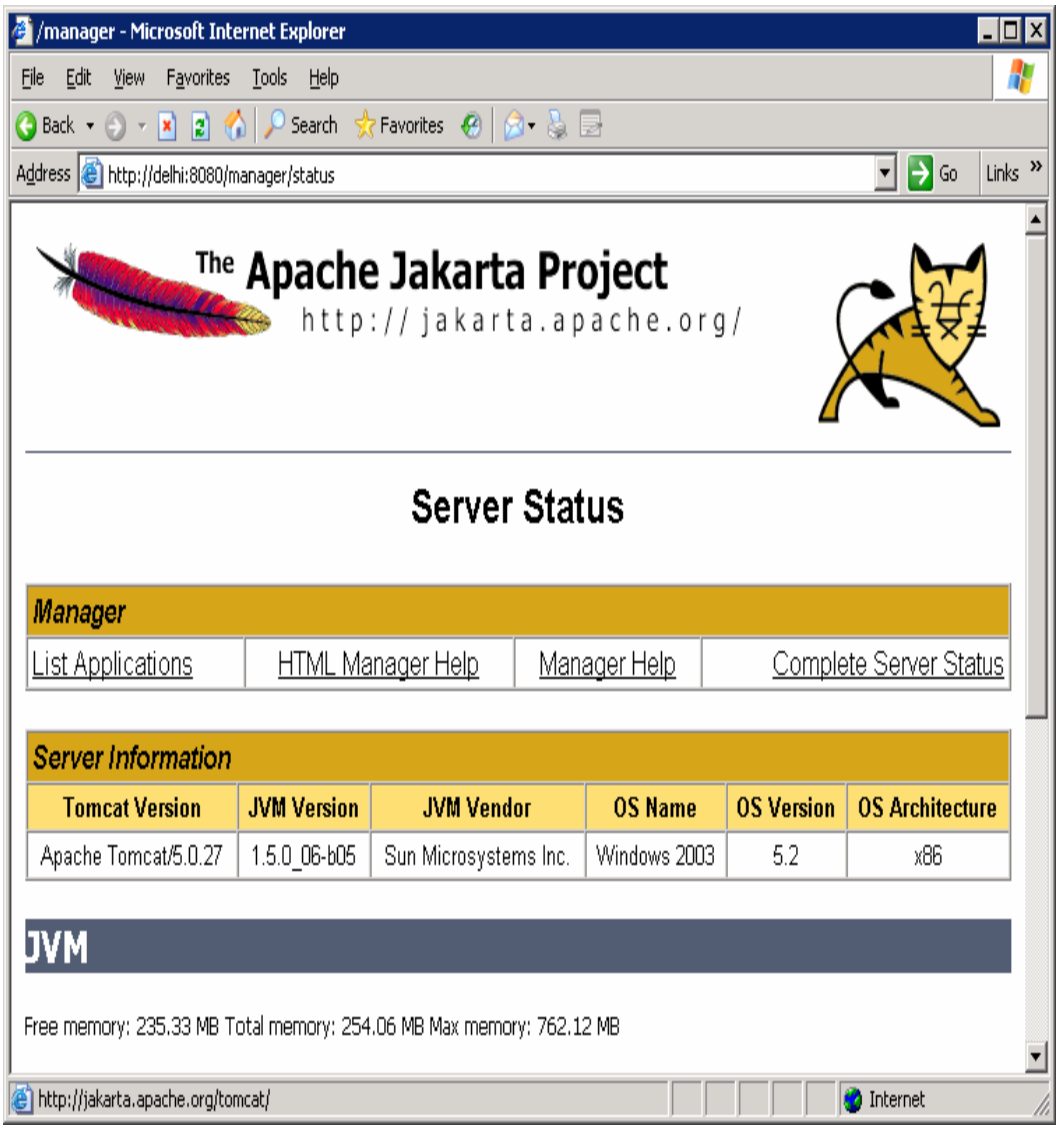
This will enable you to login into the Tomcat manager as admin/admin



2. Start – Programs – Tomcat – Tomcat Configuration: Add the Initial Memory Pool and the Maximum memory pool configuration on the text boxes: Also add the –XX:MaxPermSize=128m to the Java options text area.



3. To verify, open Internet Explorer and type in *http://<machinename>:8080*. This will display the Tomcat page. Click on Tomcat Manager Hyperlink and login as admin/admin. Click on the Server Status on the right of the page and verify the Memory settings in the JVM section of the page.



4. Shutdown tomcat.

   a. Open the Services Manager by Clicking on Start – Run – services.msc
   b. Click on the Service "Apache Tomcat 5.0.27" and click Stop

5. Startup tomcat.

   a. Open the Services Manager by Clicking on Start – Run – services.msc
   b. Click on the Service "Apache Tomcat 5.0.27" and click Start

Deploying InfoView

1. From the *C:\LAPPS\post-install* folder, uncompress the desktop.tar.gz and the adhoc.tar.gz into *c:\Program Files\LogicalApps\tomcat\webapps* folder
2. Open the file *C:\Program Files\LogicalApps\tomcat\webapps\desktop\WEB-INF\web.xml* in a text editor

Replace the <HOST> by the name of the server where the Business Objects was installed. Note that if you have chosen an alternate port for 6400 during the Business Objects Installation; change the value of the port number to reflect that

Save and exit the file

3. Open the file *C:\Program Files\LogicalApps\tomcat\webapps\adhoc\WEB-INF\adhoc-config.xml* in a text editor. This is for the adhoc reporting tool

   Replace the <HOST> by the name of the server where the Business Objects was installed. Note that if you have chosen an alternate port for 8080 during the Business Objects Installation, then change the value of the port number to reflect that

   Save and exit the file.

Deploying ACTIVE Governance middleware platform

1. Copy ags.xml from *C:\LAPPS\post-install* to *C:\Program Files\LogicalApps |tomcat\conf\Catalina\localhost* and modify the file:

   This file defines data connections to the AG schema and the Oracle Data Governor schemas

   Locate the tag <ResourceParams name="jdbc/onecenterDS">. This defines the Active Governance Database Credentials. Within that

   - If AGS is installed on Oracle
     - Locate the parameter driverClassName
     - Modify the value to oracle.jdbc.driver.OracleDriver
     - Locate the parameter url
     - Modify the value to

       <parameter>

       <name>url</name>

       <value>**jdbc:oracle:thin:@<HOST>:<PORT>:<SID>**</value>
       </parameter>

   Locate the username and password tag underneath it and modify it accordingly

   <parameter>
   <name>username</name>
   <value>**<LAPPS_AG_SCHEMA_NAME>**</value>
   </parameter>

   <parameter>
   <name>password</name>
   <value>**<LAPPS_AG_SCHEMA_PASSWORD>**</value>
   </parameter>

Locate the tag <ResourceParams name="jdbc/appsaccessDS">. This defines the Oracle Data Governor Database credentials. Within this tag

- Since Oracle Data Governor is installed on Oracle
  - Locate the parameter driverClassName
  - Modify the value to oracle.jdbc.driver.OracleDriver
  - Locate the parameter url
  - Modify the value to

```
<parameter>
    <name>url</name>
    <value>jdbc:oracle:thin:@<HOST>:<PORT>:<SID></val
    ue>
</parameter>
```

Locate the username and password tag underneath it and modify it accordingly

```
<parameter>
  <name>username</name>
  <value>apps</value>
</parameter>

<parameter>
  <name>password</name>
  <value><APPS_PASSWORD></value>
</parameter>
```

Save and exit the file

2. Copy ags.war file. *C:\LAPPS\ags.war* to *C:\Program Files\LogicalApps\Tomcat\webapps* folder
3. Copy the Active Governance JAR files to their appropriate directory. Copy *C:\LAPPS\postinstall*.jar* files to *C:\Program Files\LogicalApps\Tomcat\common\lib* folder.
4. Startup Tomcat
   a. Open the Services Manager by Clicking on Start – Run – services.msc
   b. Click on the Service "Apache Tomcat 5.0.27" and click Start

Configuring the Business Objects Server

1. Copy ojdbc14.jar file from *C:\LAPPS\post-install* to *C:\Program Files\LogicalApps\Common Files\Business Objects\3.0\java\lib*
2. Edit the file *C:\Program Files\LogicalApps\Common Files\Business Objects\3.0\java\CRConfig.xml* and add the following to the front of the <Classpath> element: *C:\Program Files\LogicalApps\Common Files\Business Objects\3.0\java\lib*
3. Change the database records setting for the Business Objects RAS server:

a. Log in to the Business Objects Enterprise Central Management Console, at the following URL. If you chose an alternate for port 8080 of the installation procedure, change the value *8080* in the following URL to the correct number for your alternate port.

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

b. Click on Servers in the home page.

c. Click on the RAS server.

d. Set DB Records to unlimited.

4. Configure InfoView. Log in to CMC and navigate to Home-->Business Objects Enterprise Applications-->InfoView

   a. Set the Viewer to Advanced DHTML by checking the option in Viewers and setting it to Advanced DHTML.

   b. Hide the Preferences by unchecking the Show "Preferences" button under the Display section.

   c. Hide filters tab on the schedule page by unchecking Show "Filters" tab.

5. Click Start – Programs – Business Objects XI – Business Objects Enterprise – Central Configuration Manager and Restart all the services

6. Personalize the Administrator password (Home-->Users-->Administrator).

Installation of AG Schema

Run the following commands to create AG schema objects and seeded data. This assumes that the Oracle Client has been installed and the appropriate tnsnames have been appended as outlined in the pre-requisites section.

1. Shutdown tomcat

   c. Open the Services Manager by Clicking on Start – Run – services.msc
   d. Click on the Service "Apache Tomcat 5.0.27" and click Stop

2. Create a custom properties file by making a copy of *C:\LAPPS\ags_install\config\filters-bundle-oracle.properties*

   > copy *filters-bundle-oracle.properties filters-<host>.properties*

3. Edit the custom properties file, filters-<host>.properties, by changing the following lines to the appropriate parameters,

   hibernate.connection.url=**jdbc:oracle:thin:@<host>:<post>:<sid>**
   hibernate.connection.username=**LAPPS_AG**
   hibernate.connection.password=**< LAPPS_AG password>**

   businessObjects.server=**<host>**
   businessObjects.serverPort=**6400**

businessObjects.username=**Administrator**

businessObjects.password=**<Administrator password>**
businessObjects.schema=**LAPPS_AG-DC**
businessObjects.appsRulesSchema=**XXLAAPPS-DC**
log4j.filepath=**C:\Program Files\LogicalApps\tomcat\logs\ags.log**
callbackhost=**http://<Host>:8080/ags**

4. Edit the build.properties, by changing the following lines to the appropriate parameters,

   cd ..

   In the build.properties file
   change line 1, config=**bundle** to config=**<host>**
   The <host> above must match the <host> in filters-<host>.properties filename

5. Execute the AG Installation Script to create the AG Schema and Environment. Open a DOS command Window and change the directory to *C:\LAPPS\ags_install* folder. Execute the batch file everything.bat.

6. Copy the AG LOG file to its appropriate directory. Copy *C:\LAPPS\log4j.properties* file to *C:\Program Files\LogicalApps\Tomcat\common\classes* folder.

7. Startup tomcat

   a. Open the Services Manager by Clicking on Start – Run – services.msc
   b. Click on the Service "Apache Tomcat 5.0.27" and click Start

Installing LogicalApps Business Views and Reports

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

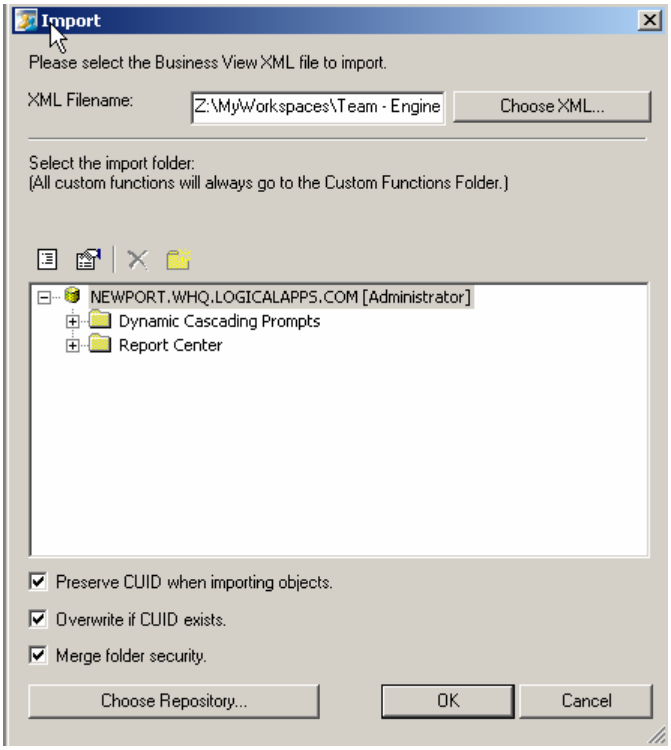
- Import XML files that support Logical Apps reports.
- Establish data connections and dynamic data connections between the client and the Logical Apps data source.
- Publish reports in the Business View Manager repository.

Importing XML Files (Business Views)

1. Customer Support ships the Reports in a separate zip file. Extract the contents of the zip file into an install directory (Where the Business Objects Client install resides) You should see a directory called Reports Center and a sub directory called Business Views.
2. Open Business View Manager.
   a. In Windows, click on Programs > Business Objects XI > Business Objects Enterprise

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

3. In Business View Manager, click on Tools in the menu bar and on Import in the Tools menu and then the Import dialog opens.



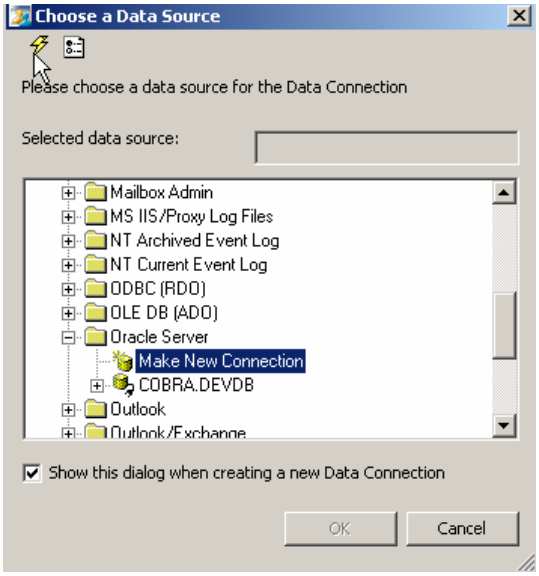
4. Ensure that the line displaying the host name and domain name for the business objects server is selected.
5. Click on the Choose XML button, navigate to the Reports Center/Business Views directory extracted above, and select one of the XML files in that directory. The name and path of the file should appear in the XML Filename field.
6. Ensure that the three checkboxes near the bottom of the form are selected. These are labeled "Preserve CUID when importing objects," "Overwrite if CUID exists," and "Merge folder security."
7. Click on the OK button. Choose to overwrite if there is any existing content.
8. For the initial import, a Reports Center directory will be created in the Repository Explorer.
9. Repeat Step 2 for all XML files located in the Report Center subdirectory.

Establishing Data Connections

As you establish data connections and dynamic data connections between the client and the Logical Apps data source, you can set up either Oracle or JDBC. For you to use Oracle, the

Oracle Client must be installed on your machine, and TNSNAMES in the Oracle Client must be configured with the same aliases configured on the server side.

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

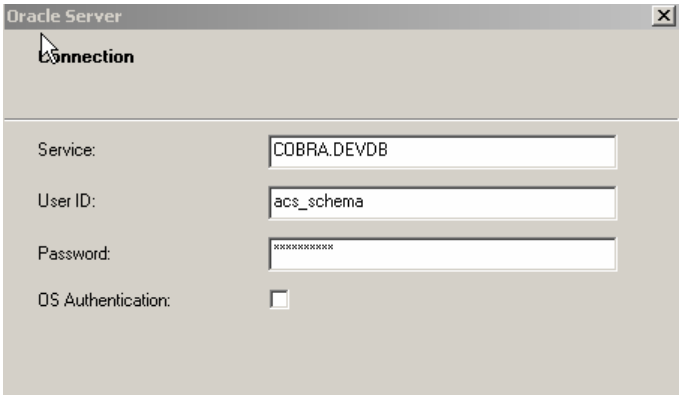


2. If you are setting up Oracle, click on the Oracle Server entry in the list. If you are setting up JDBC, click on the JDBC entry in the list.

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

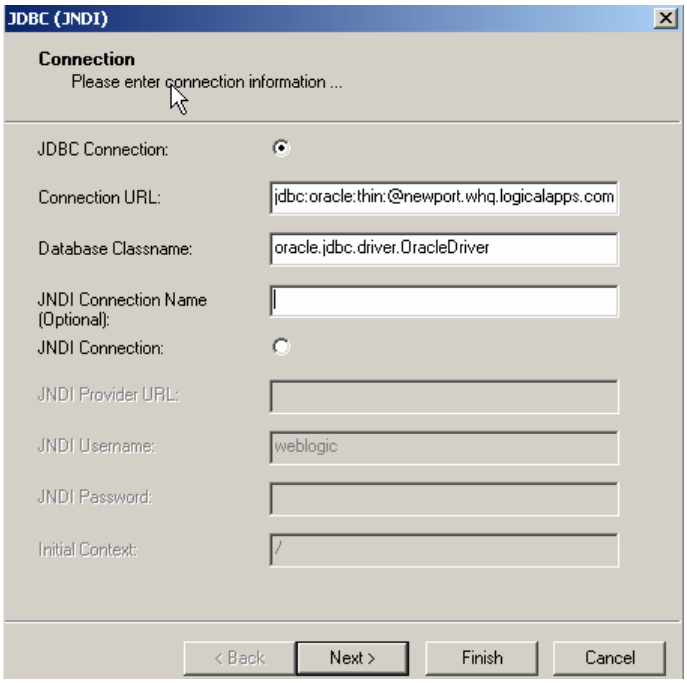
3. Complete fields in the Connection window.

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



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

   If you use JDBC, the window looks like this:



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

   You need to create at least 2 connections One to AG schema and at least one to AppsRules schema

   Hit Next

   Specify UserID and Password

   Make sure that the xxlaaps schema has been created.

Xxlaapps_ag / ag (AG achema)

Hit Finish

It will show the data source list connection

Hit OK

Set Data Connection Password dialog box appears. If this dialog box does not show up then click on the password in the Property Browser (if this doesn't appear choose it from the menu)

Enter the schema name and password (twice)

In the drop down choose "Never Prompt"

Make sure that single sign on is unchecked

Hit OK

Click on the Save Button to save Data Connection.

Choose an appropriate name for the data connection (for eg <HostName>_<DatabaseName>_<SchemaName>_<InstanceName>

For eg: Vmware_visdb_xxlaapps_ag_ag

Save it to ReportCenter->Data Connections

Click on Save

Repeat this for the other data sources (AppsRules DataSources)

Vmware_visdb_xxlaapps_xxlaapps

If choosing Oracle Server

Service: NEWPORT.QA

Xxlaapps/xxlaapps

4. In the Repository Explorer of Business View Manager, set up dynamic data connections (DDC).
   a Double click on AG Source Data (for connections to ACTIVE Governance source data).

   Delete all existing data connections

   Click on Add

   Choose the AG Source Data -> Click Add

   Close

   Click on Save

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

Delete all existing data connections

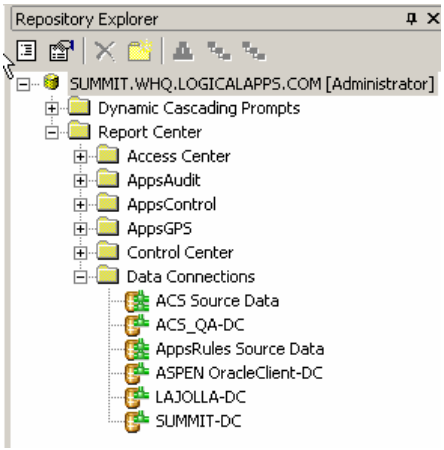
Click on Add

Choose the AG Source Data -> Click Add

Close

Click on Save

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



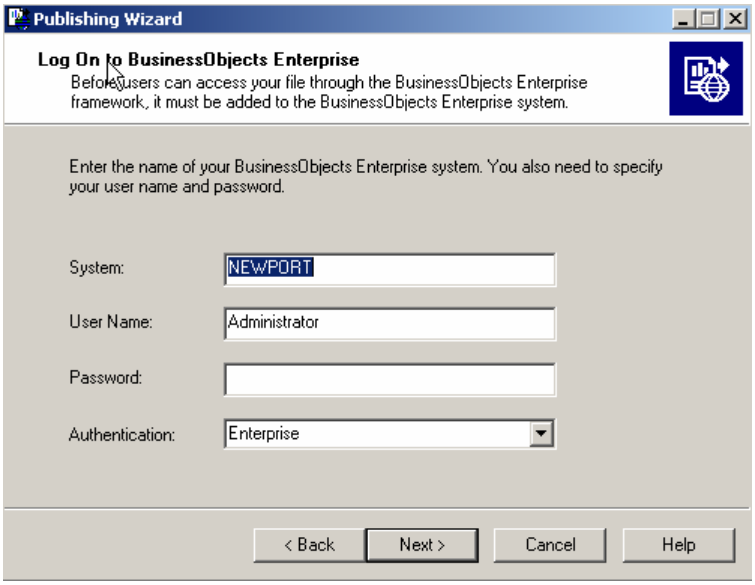
Publishing Reports

Ensure that no reports exist. Go to the desktop application and choose the Report Center folder and Delete it. Otherwise this process with create duplicate reports

Especially if you are doing a complete dump of reports

To publish LogicalApps reports in the Business View Manager repository:

1. Log on to the Publishing Wizard: in Windows, click on Programs > Business Objects XI > Publishing Wizard.
2. Press Next.
3. Complete fields in the Log On screen:

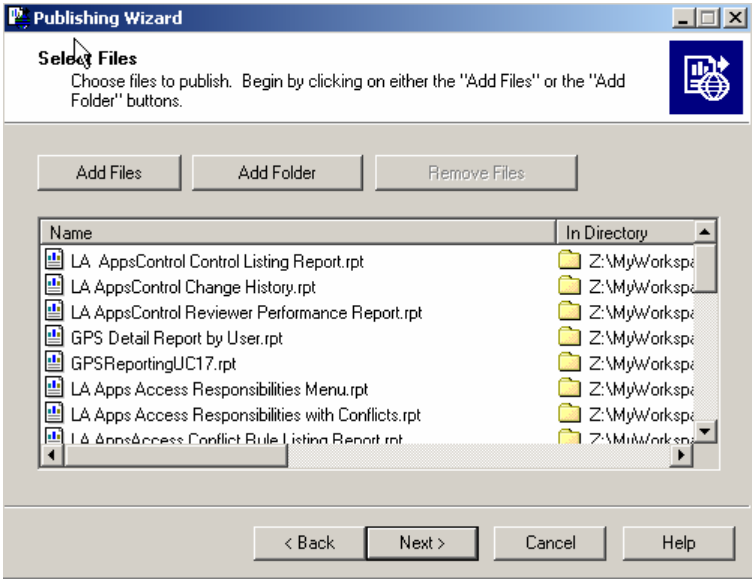


a. System is the host name of your Business Objects server, as well as its port number if that number is not 6400 (the default). If you need to include the port number use the format *Name:nnnn*.

b. Accept defaults for User Name and Password.

c. The value for Authentication is always Enterprise.

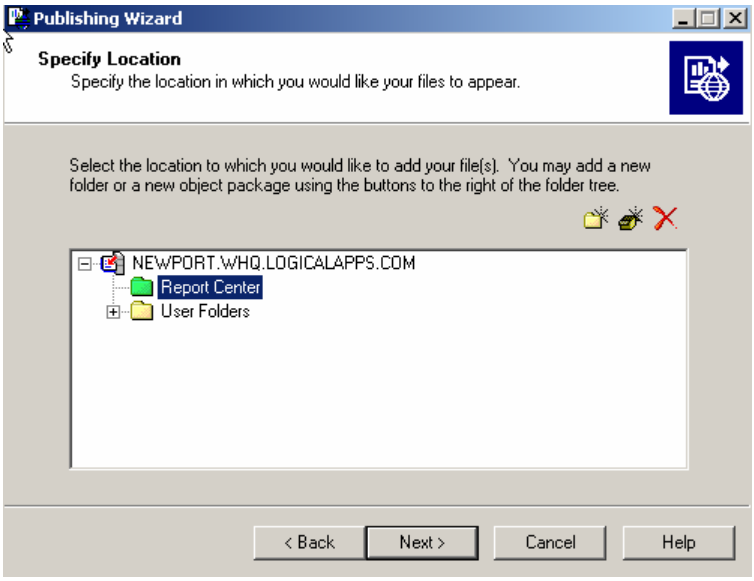
4. Click on the Next button. In the Select Files screen, click on the Add Folder button. Navigate to the ./ACS71/Report Center directory. Check the Include Subfolders option.



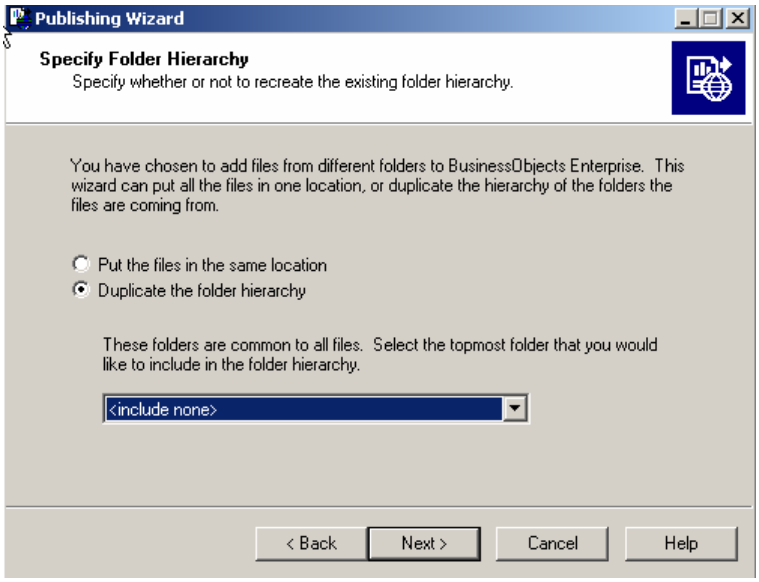
5. Click on the Next button. In a Specify Location screen, ensure that the line displaying the host name and domain name for the business objects server is selected. Click on the

create-folder icon (the leftmost of the three above the white text area) and name the folder Report Center.

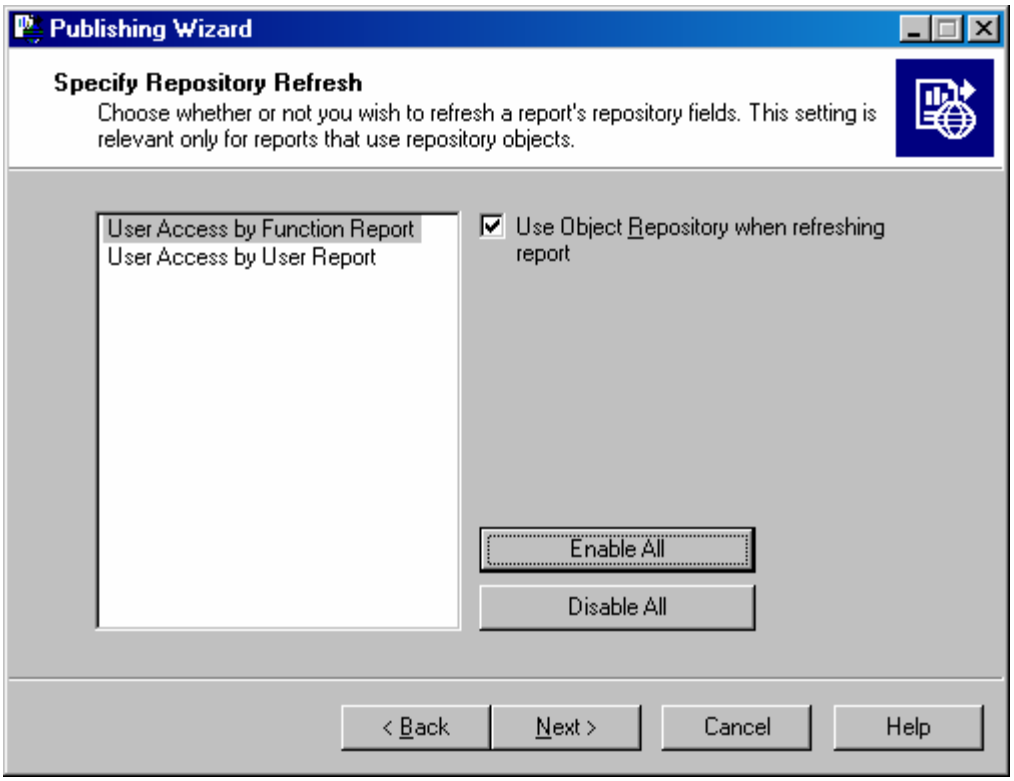
6. Click on the Next button. In a Specify Location screen, ensure that the line displaying the host name and domain name for the business objects server is selected. Click on the create-folder icon (the leftmost of the three above the white text area) and name the folder Report Center.



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



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



9. Click the Next button until you reach a Choose Default Values screen. In it, select the "Publish without modifying properties" option.
10. Click the Next button and accept defaults in any remaining screens until you can click the Finish button.
11. Close
12. Ensure that the reports center director is created in the InfoView application

Configure Licenses

BO Licenses

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

1. Log in to the Business Objects Enterprise Control Management Console, at the following URL. If you chose an alternate for port 8080 of the installation procedure, change the value *8080* in the following URL to the correct number for your alternate port.

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

2. Click on License Keys in the home page.
3. Add the Crystal Reports Explorer Add-On by entering its license code, as provided to you by LogicalApps.
4. Add the Dashboard Manager Add-On by entering its license code, as provided to you by LogicalApps.

AG Licenses

1. Log into the Active Governance Application

   http://<hostname>:8080/ags

2. Select the Administration Tab
3. Click on Manage Licenses
4. Type in Organization Name in the textbox.
5. Type or browser and select the 4 license file supplied to by LogicalApps.
   a. **ACTIVE Governance Platform** license file = platform.lic
   b. **ACTIVE Access Governor** license file = accessGovernor.lic
   c. **ACTIVE Data Governor** license file = dataGovernor.lic
   d. **ACTIVE Policy Governor** license file = policyGovernor.lic
6. Click on the Save button.

Configure ACTIVE Governance Control Monitors

The ACTIVE Governance Control Monitors supplied are in the ora_pack_ <version number>_<build number>.zip file. Please see the Policy Governor Online User Guide for procedures for importing Control Monitors.

Configure ACTIVE Governance Application

1. Log into the Active Governance Application

   http://<hostname>:8080/ags

2. Select the Administration Tab
3. Verify the version number in the lower right-hand corner.
4. Click on Manage Configuration Properties
5. Click on the key: businessObjects.server

   Change PropertyValue to <BusinessObjectsHostName>

   Eg (aspen.whq.logicalapps.com)

6. Click on the key: businessObjects.serverPort

   Change PropertyValue to <BusinessObjectsPort>

   Eg (default = 6400)

7. Click on the key: businessObjects.username

   Change the property value to Administrator

8. businessObjects.schema

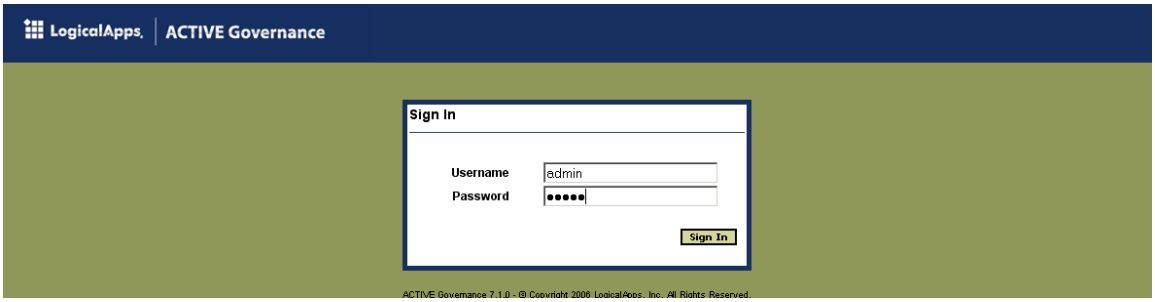
   This should be set to the exact (Case sensitive) name provided during the time of creating the data connection to Active Governance Schema in Step 3 of Establishing Data Connections

9. businessObjects.appsRulesSchema

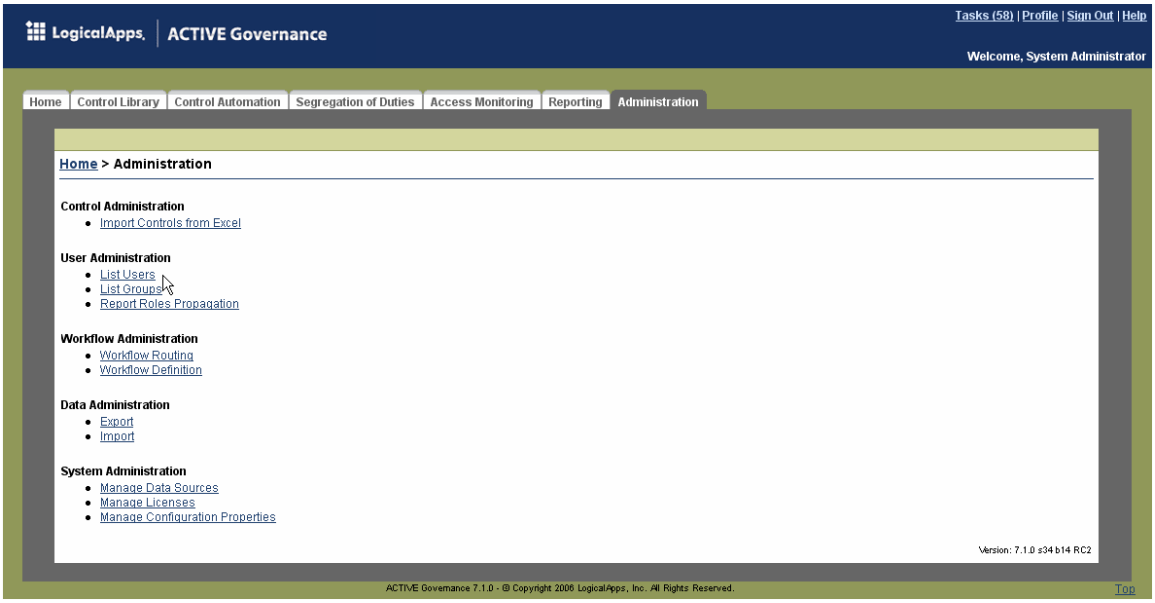
   This should be set to the exact (Case sensitive) name provided during the time of creating the data connection to the AppsRules Schema in Step 4 of Establishing Data Connections. This connection will reflect the default AppsRules connection for the Application. This will be the source for the Graphs and charts in the dashboard

Create AG Super User (Required for next step)

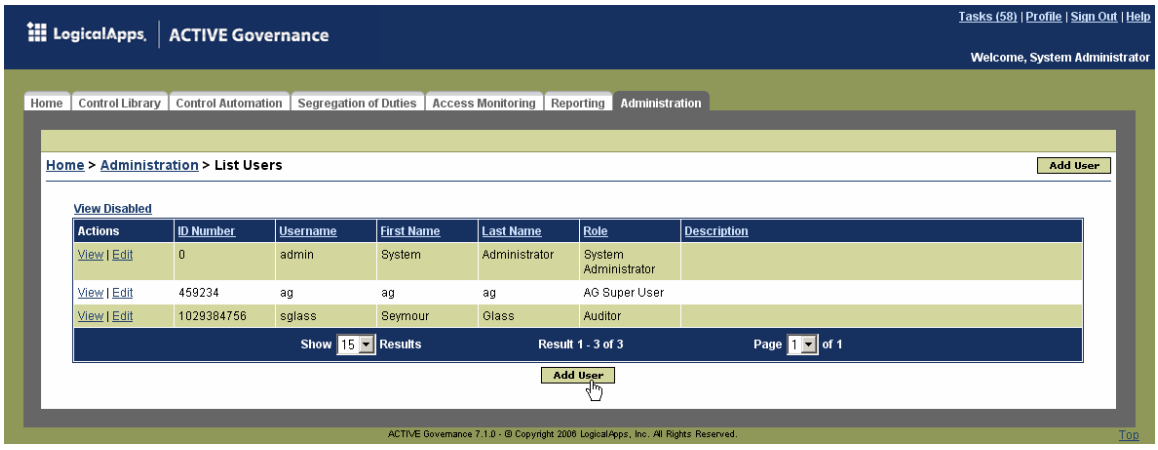
Login to the ACTIVE Governance website with user: admin and password: admin



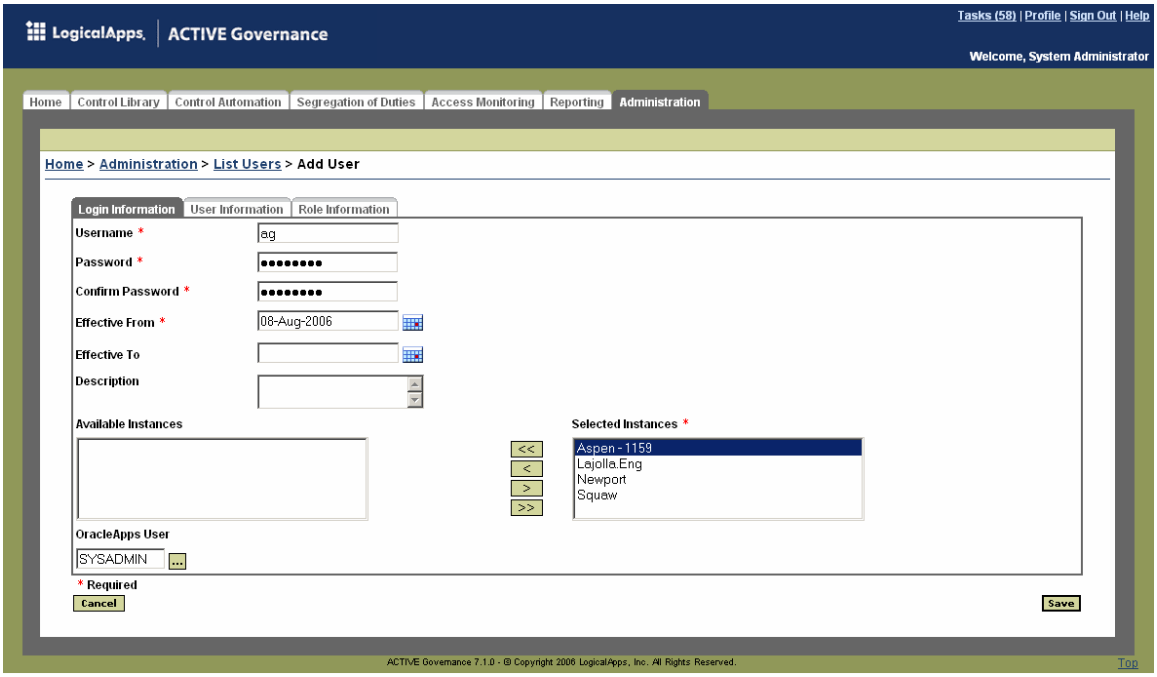
Navigate to the **Administration** tab and click on the **List Users** link



Click on the **Add Users** button at the bottom to add a new user.



Create a Super User called ag



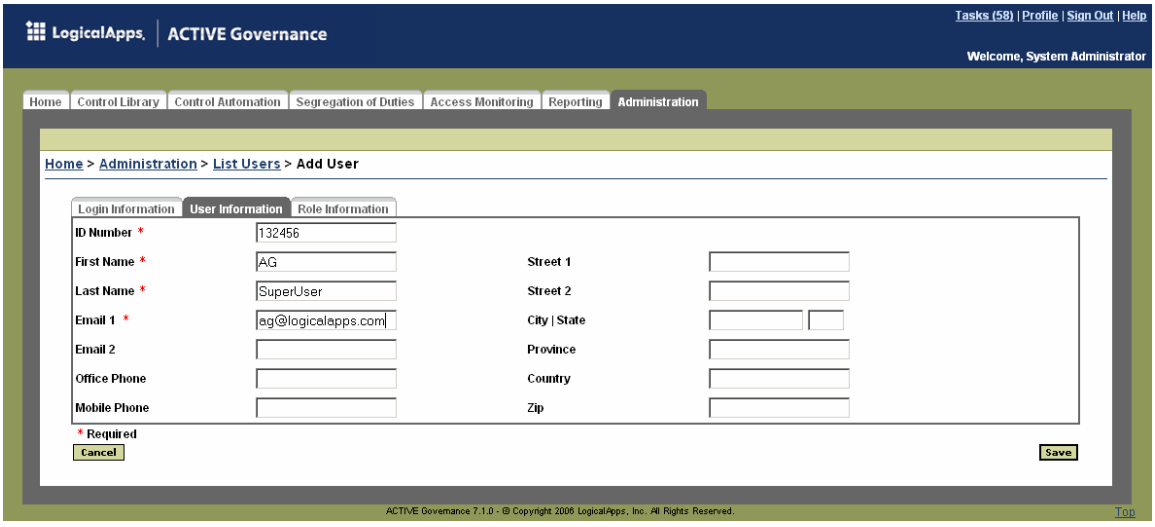
Username: ag

Password: Welcome1 (password should contain at least one uppercase and one numeric value and should be at least 8 characters long)

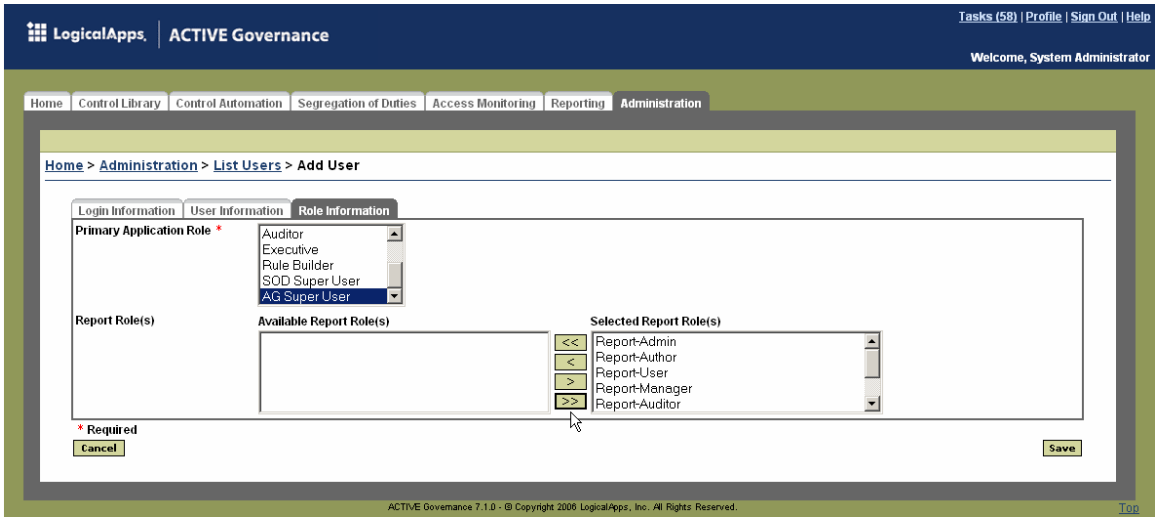
Instances: select an instance

OracleApps User: select an oracle instance user

Navigate to the **User Information** Tab and fill out the required fields.



Continue to the **Role Information** tab and select the AG Super User role and select all reporting roles



Click the **Save** button

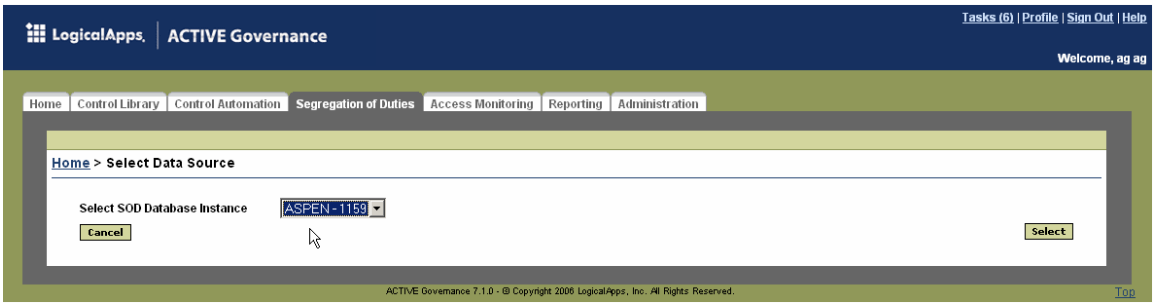
Log out, and then log in again as the ag user you just created. Ensure that you can access all the tabs in the application.

Run the Workflow population concurrent program

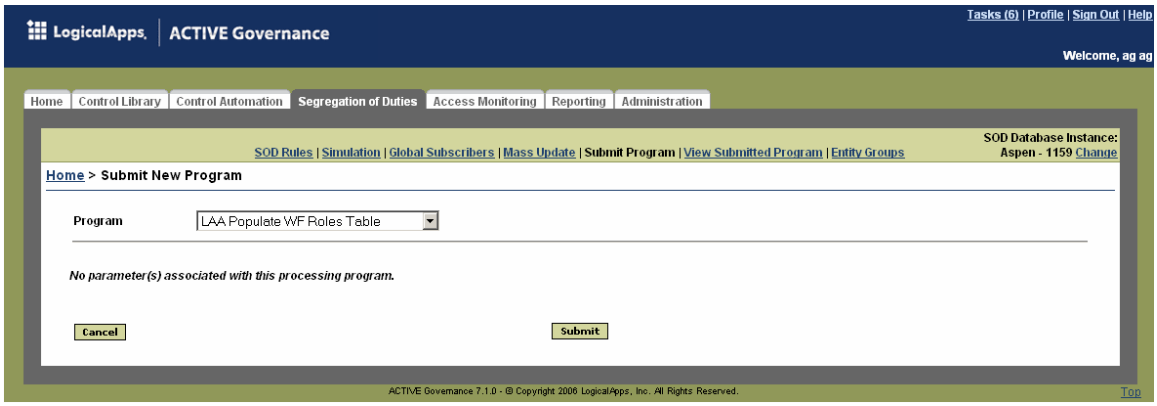
This concurrent program seeds the LA Workflow Roles table with the workflow role data.

Log in as the ag user.

Navigate to the **Segregation of Duties** tab and select the *SOD Database Instance*. Click the **Select** button.



Navigate to the **Submit Programs** link under the **Segregation of Duties** tab.



Appendix A – Change the Log Levels for Tomcat

Edit the *C:\Program Files\LogicalApps\Tomcat\common\classes\log4j.properties* file

Set the following property

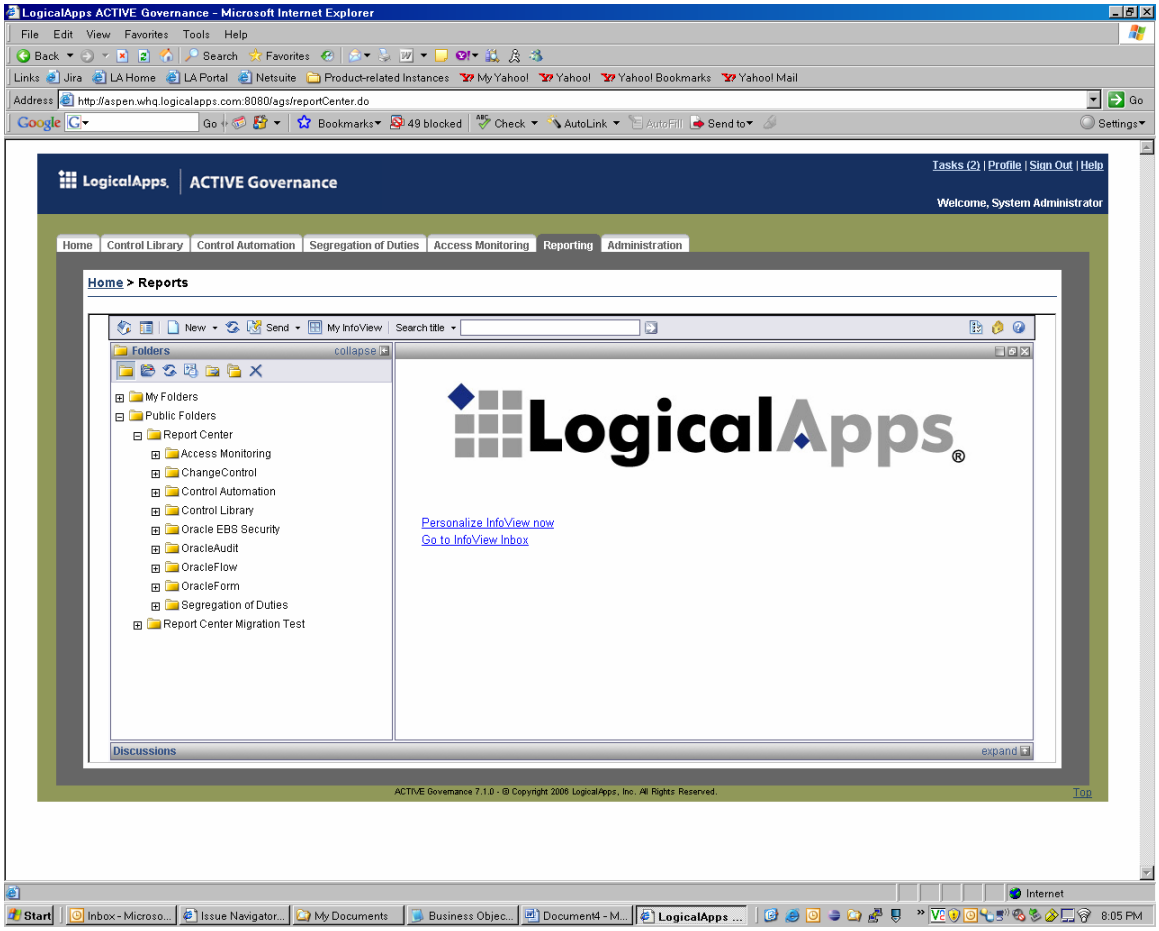
log4j.logger.com.logicalapps.onecenter=**INFO**, file (INFO = default)

There are 4 different filter values
less logging ←----------→ more logging
INFO > **WARN** > **ERROR** > **DEBUG**

Appendix B - AG Installation Validation

After an install (including post installation steps), the following steps need to be performed:

1. Login to ACTIVE Governance as admin/admin
2. Select the **Administration** tab and look for the release version at the bottom right of the screen. For 7.1 release, it should read 7.1.0 s41 b18, where s41 represents the schema version and b18 represents the build number. This information will need to be presented to support when issues arise.
3. Setup licenses
    a. Select Manage Licenses under the System Administration Header and enter the license information as provided by LogicalApps.
4. Create Data Sources to APPS instance(s)
    a. Select Manage Data Sources
    b. Click the *Add Data Source* button
    c. Enter the details of the data source and click the *Select* button.
    d. Click on "Test Data Source"
    e. If "Test is Successful" message is displayed on the screen then proceed further to step 5
5. Create User(s)
    a. Select *List User* under the User Administration header
    b. Click on *Add User* button
    c. Enter all required fields in the Login Information, User Information and Role Information tabs.
    d. Make sure to select an instance and Oracle Apps User
    e. Click on the *Save* button to create the user
6. Select Manage Configuration Properties under the System Administration header and validate all properties including the BO properties are set appropriately.
7. Select the **Reporting** tab and check to make sure that you can see all report folders as shown in the screenshot. Click on the report tab and make sure you see reports listed under each of the tabs.



Steps to view SOD Rules screen

1. Login as admin/admin
2. Create a data source to the APPS instance as documented in step 4 above
3. Create a user with SOD Super User role as documented in step 5
4. Logout of the application
5. Login as the SOD Super User created in the previous step
6. Click on the **Segregation of Duties** tab
7. Select the instance that you have mapped for the user.
8. Application will be redirected to the "View SOD Rules" screen

Appendix C - Business Objects Integration Troubleshooting Guide

BO Configuration Validation

1. businessobjects.username and businessobjects.username config properties must be a valid administrator account in Business Objects. Always check access to CMC or InfoView with these credentials before installing AGS. If this username/password won't let you access CMC or InfoView it won't work for AGS also.

2. Business Objects and Tomcat must be running during the AGS installation. Otherwise the Roles and Users won't be created in Business Objects.

3. If Business Objects Report Security configuration property is created and set to value "false", all AGS users will have access to BO using the same administrator account bypassing BO security for report access rights.

4. If all reports in Report Center show without hyperlinks most likely cause is that Access Rights were not loaded from security matrix. Go to CMC and check any report if it has FULL_ACCESS rights for some roles and NO_ACCESS to others. If no rights were set - run loadAccessRights.bat(.sh) script again.

5. When you click on Reporting tab you see BO login screen. Most likely the current user wasn't propagated to BO. Try to login to CMC with the same credentials. If it fails - go to AGS profile page and change your password (you can change it to the same value). Your account will be propagated.

Report Error Troubleshooting

Follow the steps below when you get “Failure to Process Prompting” message in theReporting tab and the case when a report parameter list is not populated with its List of Values.

1. Login into Business View Manager.
2. Click on Report Center, on the right hand side.
3. Click on the folder where the problem occurred. (ie Segregation of Duties)
4. Click on the folder of the particular report we have the problem with (ie SOD User Conflicts Summarized)
5. Find the prompt item that corresponds to the List of Values that is not populated in the report (i.e. Snapshot).
   In the case of Failure to Process Prompting, schedule all the prompt items.
6. Right click on that object and select Schedule List of Values from the menu.
7. Click ‘OK’ on the Schedule window that pops up.
8. Click on the ‘Parameters Values’ button on the next screen.
9. Select the appropriate data source ‘Value’.
10. Click ‘OK’.

11. Click 'OK'.
12. Now we want to login into AGS to check our report.
13. Navigate to the reports (Reporting | Report Center | Segregation of Duties | Conflict Summary Report)
14. Click on the report to validate that the List of Values were populated.
15. Once validated, return to the Business View Manager.
16. Navigate to the prompt item (i.e. Snapshot).
17. Right click on that object and select Edit List of Values
18. Click 'Clear Instance'
19. You are now set up for running the reports.