



# InQira Analytics Installation Guide

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*Installing and Configuring InQira Analytics Applications*

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InQira Version 8.2

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**InQira, Inc.**

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This guide is intended for technical staff who are responsible for installing and configuring InQira Analytics to report on Intelligent Search and Information Manager applications. It provides detailed information on installing and configuring InQira Analytics components.

This preface includes information on:

- The general organization of this guide
- The support services available from InQira Customer Support
- The available product documentation

## In This Guide

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The *InQuira Analytics Installation Guide* is divided into the following sections:

<i>Chapter 1, InQuira Analytics Overview</i>	This chapter describes the general installation process, lists hardware and software requirements and dependencies, and provides product packaging and distribution information.
<i>Chapter 2, Installing InQuira Analytics</i>	This chapter describes the pre-installation checklist and how to use the automated installation program to install and configure either Intelligent Search Analytics, Information Manager Analytics, or both products.
<i>Chapter 3, Creating the ODBC DSN</i>	This chapter describes how to configure the ODBC DSNs used in InQuira Analytics.
<i>Chapter 4, Creating the InQuira Analytics Metadata Database</i>	This chapter describes how to create the metadata schema.
<i>Chapter 5, Installing and Configuring the InQuira Analytics Report Server</i>	This chapter describes using the packaged installation program to install and configure the MicroStrategy software that supports InQuira Analytics report creation and presentation.
<i>Chapter 6, Configuring Report Generation</i>	This chapter describes how to configure InQuira Analytics to generate reports.

## Contacting InQuira

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You can contact InQuira by mail, telephone, fax, and email.

<b>Address:</b>	851 Traeger Ave. Suite 125 San Bruno, CA 94066
<b>Telephone:</b>	(650) 246-5000
<b>Fax:</b>	(650) 264-5036
<b>Email:</b>	For sales information, send email to <a href="mailto:sales@inquira.com">sales@inquira.com</a> . For product support, send email to <a href="mailto:support@inquira.com">support@inquira.com</a> .
<b>World Wide Web:</b>	Learn more about InQuira products, solutions, services, and support on the world wide web at: <a href="http://www.inquira.com">www.inquira.com</a> .



# InQuira Product Documentation

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InQuira documentation is available only to licensed users of our software products and may not be redistributed in any form without express permission from InQuira, Inc.

The InQuira documentation is available in PDF format. Customers can download the PDF files from:

<http://documentation.inquira.com/>

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**NOTE:** You need a PDF reader application installed on each processor on which you plan to view the InQuira product documentation. The Adobe Acrobat reader is available from Adobe Systems at: <http://www.adobe.com>.

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Detailed information about each product document set is available in:

- [Intelligent Search Documentation on page 3](#)
- [InQuira Analytics Documentation on page 5](#)
- [Information Manager Documentation on page 6](#)
- [Contact Center Documentation on page 7](#)

If you encounter a problem, need help using the documentation, or want to report an error in the content, please contact InQuira Customer Support.

If you need help obtaining InQuira product documentation, or want to obtain permission to redistribute a portion of the contents, please contact your InQuira account representative.

## Intelligent Search Documentation

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Intelligent Search is distributed with the following documentation.

<b>Document</b>	<b>Number</b>	<b>Description</b>
<b>Intelligent Search Installation Guide</b>	IS80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira 8.1. It provides detailed information on installing InQuira 8.1 and configuring the application on a single processor using the Installation Configuration Environment facility.

<b>Intelligent Search Administration Guide</b>	IS80-CA-00	This guide is intended for system and application administrators who need to configure an InQuira 8.1 application in an enterprise environment. It describes InQuira 8.1 integration, development, configuration, and maintenance processes and tasks.
<b>Intelligent Search Language Administration Guide</b>	IS80-LA-00	This guide is intended for business users and subject matter experts who need to create and maintain the language processing elements of an InQuira 8.1 application using the System Manager. This book provides usage information about the System Manager, conceptual information about the InQuira 8.1 language objects, and task information about the process of managing the user experience provided by the InQuira 8.1 application.
<b>Intelligent Search Language Tuning Guide</b>	IS80-LD-00	This guide is intended for application developers who need to create and maintain advanced InQuira 8.1 language-processing elements using the Dictionary and other InQuira Language Workbench applications.
<b>Intelligent Search Optimization Guide</b>	IS80-AG-00	This guide is intended for application developers who need to implement InQuira 8.1 advanced features, including Personalized Navigation and Process Wizards.
<b>Intelligent Search Application Development Guide</b>	IS80-API-00	This guide provides information about integrating and customizing the InQuira 8.1 Personalized Response User Interface.

<b>Intelligent Search Language Reference</b>	IS80-LRG-00	This guide is for language developers implementing InQira 8.1 applications that utilize the intent libraries and advanced language processing functions. These guides are published as separate documents that provide reference information for each industry-specific intent library. Each reference also contains complete descriptions of InQira Match Language and Variable Instantiation Language.
<b>Intelligent Search User Interface Guide</b>	IS80-UI-00	This guide is intended for application developers who need to customize the InQira 8.1 Personalized Response User Interface, and integrate it with a production web application. It contains information about the elements and features of the User Interface, and provides guidelines for integrating it into an enterprise web architecture, customizing its appearance and functionality, and implementing various special features.

## InQira Analytics Documentation

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InQira Analytics is distributed with the following documentation.

<b>Document</b>	<b>Number</b>	<b>Description</b>
<b>InQira Analytics Installation Guide</b>	IA80-IG-00	This guide is intended for technical staff who are responsible for installing InQira Analytics. It provides detailed information on installing and configuring the InQira Analytics product for use with an InQira 8.1 application.
<b>Analytics User Guide</b>	IA80-CA-00	This guide is intended for systems and application administrators who need to configure the Intelligent Search and Information Manager Analytics components to report on InQira 8.1 application performance.

## Information Manager Documentation

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InQuira Information Manager is distributed with the following documentation.

<b>Document</b>	<b>Number</b>	<b>Description</b>
<b>Information Manager Installation Guide</b>	IM80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Information Manager. It provides detailed information on installing and configuring the Information Manager product.
<b>Information Manager Administration Guide</b>	IM80-CA-00	This guide is intended for systems and application administrators who need to configure and administer an InQuira Information Manager application, and integrate it with an InQuira 8.1 application. It also contains information for general business users who need to use the Information Manager to create and manage content.
<b>Information Manager Content Authoring Guide</b>	IM80-AG-00	This guide is intended for technical staff who are responsible for authoring content in InQuira Information Manager. It provides detailed information on creating content and managing workflow tasks in the Information Manager console.
<b>Information Manager Developer's Guide</b>	IM80-WSR-00	This guide is intended for application developers who need to integrate Information Manager content, content category, and user and security functions with external applications. It contains reference information and examples for all packages, classes, methods, and interfaces of the Information Manager Web Services API.

## Contact Center Documentation

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The InQuira 8.1 contact center products are distributed with the following documentation.

<b>Document</b>	<b>Number</b>	<b>Description</b>
<b>Contact Center Advisor Integration Guide</b>	CA80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira Contact Center Advisor with an InQuira application and a supported CRM application.
<b>Intelligent Search Siebel Integration Guide</b>	CAS80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate InQuira 8.1 with Siebel 7 Enterprise Applications using the Siebel Adapter for InQuira 8.1.

## Screen and Text Representations

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The product screens, screen text, and file contents depicted in the documentation are examples. We attempt to convey the product's appearance and functionality as accurately as possible; however, the actual product contents and displays may differ from the published examples.

## References to World Wide Web Resources

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For your convenience, we refer to Uniform Resource Locators (URLs) for resources published on the World Wide Web when appropriate. We attempt to provide accurate information; however, these resources are controlled by their respective owners and are therefore subject to change at any time.

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# Chapter 1 InQira Analytics Overview

InQira Analytics is a separate business intelligence application designed specifically to provide insight into the performance and use of both Intelligent Search and Information Manager.

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**NOTE:** InQira Analytics does not support Debian Linux or MySQL.

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You can use Intelligent Search Analytics to:

- Report on application performance, such as system response time
- Assess the quality of InQira 8.2 responses and whether users are finding the information they need
- Determine whether important information is missing from your application content
- Understand user behavior, such as why users visit your site, and what they try to achieve

You can use Information Manager Analytics to:

- Report on how Information Manager content is being used by end users
- Assess how content is being managed throughout the publishing lifecycle

This chapter describes:

- [The InQira Analytics Application on page 10](#)
- [InQira Analytics Architecture on page 10](#)
- [The InQira Analytics Reporting Process on page 10](#)
- [InQira Analytics Server and Processor Deployment on page 10](#)
- [InQira Analytics Requirements and Dependencies on page 11](#)

## The InQira Analytics Application

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The InQira Analytics application comprises the InQira 8.2 data warehouse, an ETL server, and a Report server, as described in [InQira Analytics Architecture on page 10](#). The requirements and dependencies of the servers and application components are described in [InQira Analytics Requirements and Dependencies on page 11](#).

## InQira Analytics Architecture

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An InQira Analytics application consists of multiple components configured to extract, store, and present data from one or more configured Intelligent Search and Information Manager instances. The InQira Analytics components include:

- The ETL server, which uses a configured InQira 8.2 instance to execute the data extraction and load (ETL) processes.
- The data warehouse, which stores the extracted Intelligent Search and Information Manager log and repository data and additional metadata used to create the reports
- The InQira Analytics Report server, which hosts the report generation and presentation functions

## The InQira Analytics Reporting Process

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The ETL process loads data from InQira 8.2 application log files to populate the data warehouse. The Report server uses that data to generate a set of standard reports that you can view, filter, print, and export using the web-based InQira Analytics user interface.

## InQira Analytics Server and Processor Deployment

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If your InQira 8.2 application processes fewer than 3,000 questions per day, you can deploy InQira Analytics on a single processor. For higher volume applications, we recommend separating the Report server from the server that hosts the database and ETL processes.

For applications processing over 30,000 questions per day, we recommend that the data warehouse, ETL, and Reports server be deployed on separate networked processors.



# InQira Analytics Requirements and Dependencies

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Hardware requirements for various InQira Analytics servers are detailed in the following sections:

- [Data Warehouse Server Requirements on page 11](#)
- [ETL Server Requirements on page 12](#)
- [Report Server Requirements on page 12](#)
- [Report Client Requirements on page 13](#)

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NOTE: The InQira Analytics environment requires an installed and configured InQira 8.2 application. See the InQira 8.2 documentation as described in [InQira Product Documentation on page 3](#) for information on installing, configuring and deploying an InQira 8.2 application.

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For platform, operating system, and database requirements, see the [Platform and Language Support Guide](#) posted on the InQira website.

## Data Warehouse Server Requirements

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This section describes the hardware and software requirements for the InQira Analytics data warehouse.

InQira Analytics requires a JDBC-compatible database for report data and report storage. The database must have a JDBC driver.

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NOTE: You can use the same database that you allocate for the InQira 8.2 Content Store as described in the section on [Databases](#) in the [Intelligent Search Installation Guide](#).

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### Data Warehouse Server Hardware Requirements

The InQira Analytics data warehouse requires the following levels of processor, memory, and storage.

Requirement	Minimum Required	Recommended
Processor	1 CPU at 600 MegaHertz (MHz)	1 CPU at 1 GigaHertz (GHz) or greater
RAM	2 gigabytes (GB)	2 GB or greater
Available disk storage	2 GB	Dependent on data quantity

## ETL Server Requirements

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This section describes the hardware and software requirements for the InQuira Analytics ETL server.

### ETL Server Hardware Requirements

The InQuira Analytics ETL server requires the following levels of processor, memory, and storage.

<b>Requirement</b>	<b>Minimum Required</b>	<b>Recommended</b>
<b>Processor</b>	1 CPU at 600 MHz or higher	1 CPU at 1 GHz or higher
<b>RAM</b>	512 MB	2 GB
<b>Available disk storage</b>	2 GB	Dependent on log data quantity.

## Report Server Requirements

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This section describes the hardware and software requirements for the InQuira Analytics Report server.

### Report Server Hardware Requirements

The InQuira Analytics Report server requires the following levels of processor, memory, and storage.

<b>Requirement</b>	<b>Minimum Required</b>	<b>Recommended</b>
<b>Server</b>	PC-compatible	PC-compatible
<b>Processor</b>	One Pentium-compatible CPU at 600 MHz or greater	One Pentium-compatible CPU at 1 GHz or higher
<b>RAM</b>	512 MB	2 GB
<b>Available hard drive space</b>	512 MB	2 GB

## ***Windows 2000 Platform Requirements***

- Windows 2000 Server SP3 or SP4
- Windows 2000 Advanced Server SP3 or SP4
- Internet Explorer 5.01 or higher

## ***Windows Server 2003 Platform Requirements***

- Windows Server 2003 Enterprise Edition
- Windows Server 2003 Standard Edition
- Internet Explorer 6.01 or higher

## **Report Client Requirements**

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This section describes the hardware and software requirements for client processors that access the InQuira Analytics Report server.

### **Report Client Hardware**

The InQuira Analytics Report client requires the following levels of processor and memory.

<b>Requirement</b>	<b>Minimum Required</b>	<b>Recommended</b>
<b>Processor</b>	450 MHz	1 GHz or higher
<b>RAM</b>	128 MB	512 MB or higher

### **Report Client Software**

The InQuira Analytics Report client requires the following software and capabilities.

- monitor resolution at 800 x 600 or higher, with 256 or greater color palette
- Microsoft Excel, or any spreadsheet application that supports the CSV file format
- Adobe Acrobat or a similar PDF creation and display program



## Chapter 2 Installing InQuira Analytics

You install the InQuira Analytics software on the processor that you have designated as the ETL server within your InQuira Analytics application. The ETL server must have an installed and configured InQuira 8.2 instance, including the Advanced Configuration Facility.

The InQuira Analytics installation process uses an automated installation program that copies the InQuira Analytics product files from the product distribution and installs InQuira Analytics into the existing InQuira 8.2 installed directory structure. The InQuira 8.2 installation program installs and configures the Intelligent Search Analytics and Information Manager Analytics products.

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**IMPORTANT:** If you encounter problems installing Analytics, see [Chapter 9, Troubleshooting Analytics](#) in the [Using InQuira Analytics](#) Guide.

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The InQuira Analytics installation and configuration process consists of the following steps:

- Ensure that the requirements and prerequisites described in [Chapter 1, InQuira Analytics Overview](#) are satisfied, and that appropriate personnel with access to the specified environments are available to perform the installation.
- Go through the pre-installation checklist and install the InQuira Analytics software, as described in this chapter.
- Establishing three separate ODBC DSNs, as described in [Chapter 3, Creating the ODBC DSN](#)
- Use the ICE prompt to create a metadata schema, as described in [Chapter 4, Creating the InQuira Analytics Metadata Database](#)
- Configure the report server on which you will run the InQuira Analytics reporting application, as described in [Chapter 5, Installing and Configuring the InQuira Analytics Report Server](#)

- Configure the log data extraction and load process, as described in *\*Populating the Reporting Databases*
- Configure the Intelligent Search and Information Manager instances that provide data to InQuira Analytics, as described in *\*Configuring the Intelligent Search and Information Manager Production Instances*

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**IMPORTANT:** The InQuira Analytics components are designed to operate only when the entire installation and configuration process is complete; do not install or use individual InQuira 8.2 product components separately from the configured product unless specifically instructed by InQuira technical staff.

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## Pre-Installation Checklist

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### ETL Data Loading

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#### **Data Archiving**

Create a datasource the archive database, as described in *Creating the Data Archive* in *Chapter 8, The Log Data Archive* of the *Using InQuira Analytics* Guide.

#### **Backup**

The system administrator or DBA should backup the data files on a regular basis to be able to recover the database in case of a disk crash, accidental deletion, or data corruption. If a backup of the database data files are used to recover the database, the IM and search logs that are not included in the backup can be re-loaded to recover the database up to the time of the disk crash or data corruption.

#### **Fault Tolerance**

A reliable and fault tolerant system should be used with the InQuira software.

The concept of mirroring and parity is available with RAID (Redundant Array of Independent Disks) drives.

At the hardware level, fault tolerance is achieved by duplexing each hardware component. Disks are mirrored and multiple processors are "lock-stepped" together and their outputs are compared for correctness. When an anomaly occurs, the faulty component is determined and taken out of service.

## Database Sizing and Performance Tuning

If the DBA creates an initial extent size large enough to store all of the records planned for a certain time period for each table, then database performance for log file loading and running reports will be better than a database with many table extents. For optimum database performance, it is best to have as few extents as possible.

The following tables are the ones that grow the fastest and should be monitored:

```
REP_SESS_CONCEPT_DIRECT_MATCH
REP_SESS_ACTIVITY
REP_SESS_QUESTION_ACTIVITY
REP_SESS_QUESTION
REP_SESSION
REP_SESS_CONCEPT_MATCH
REP_GLBL_SESS_TXT
REP_SESS_CLUSTERS
REP_GLBL_RESPONSE_TXT
MS_IM_ACCESS_ACTIVITY_FACT
REP_GLBL_CONCEPT_TXT
```

The following formulas will give an estimate of the space needed for the search log files and database space. Additional space will be required for Information Manager log loading.

# of questions per day / 175 = # of log files per day.

# of log files \* 2 mg = MB of database disk space growth on a daily basis.

---

**NOTE:** Each 5MB search log that is loaded into the database increases the database size (data and index space) from 1 - 2 MB.

---

For example, if a site processes 350,000 questions in a one-week period, it will generate about  $350,000 / 175 = 2000$  log files. If a site loads 2,000 (5MB) search log files, it will need at least 10 GB of disk space for the log files and 4 GB of database space.

## TEMP Space Sizing

It is important to watch the size of the tables because the TEMP space should be dependent on the amount of data in the database. The TEMP space is used when sorting records in a query (ORDER BY, GROUP BY) or doing a table hash join. TEMP space usage should be monitored by the DBA over various periods of time that reflect actual query usage. In general, you should have at least enough TEMP space to support the expected number of users generating large reports. If the performance degrades over time, the TEMP space usage can be evaluated and increased if needed.

# Running the Install Program

---

1. Start the installation program.

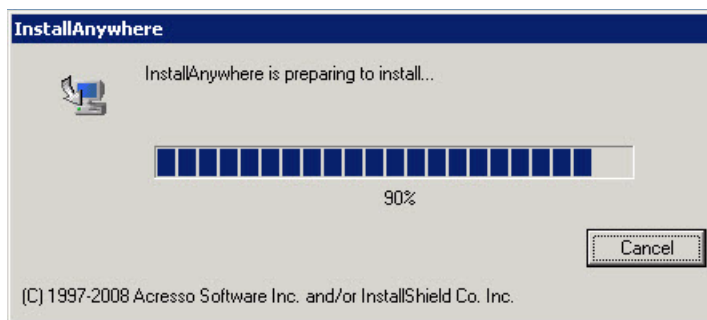
To start the installation program in Microsoft Windows environments:

Execute `install_analytics.exe`

To start the installation program in Solaris and Linux environments:

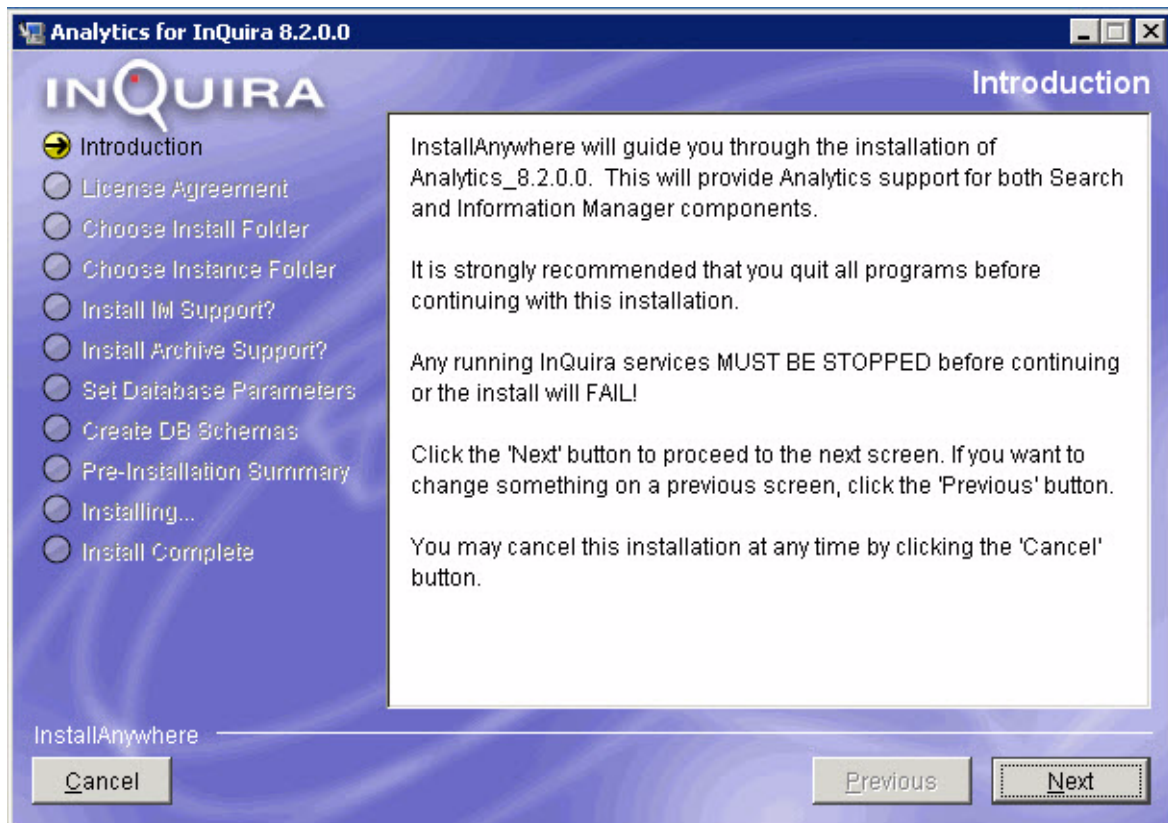
Execute `install_analytics.bin`

The installation program starts:



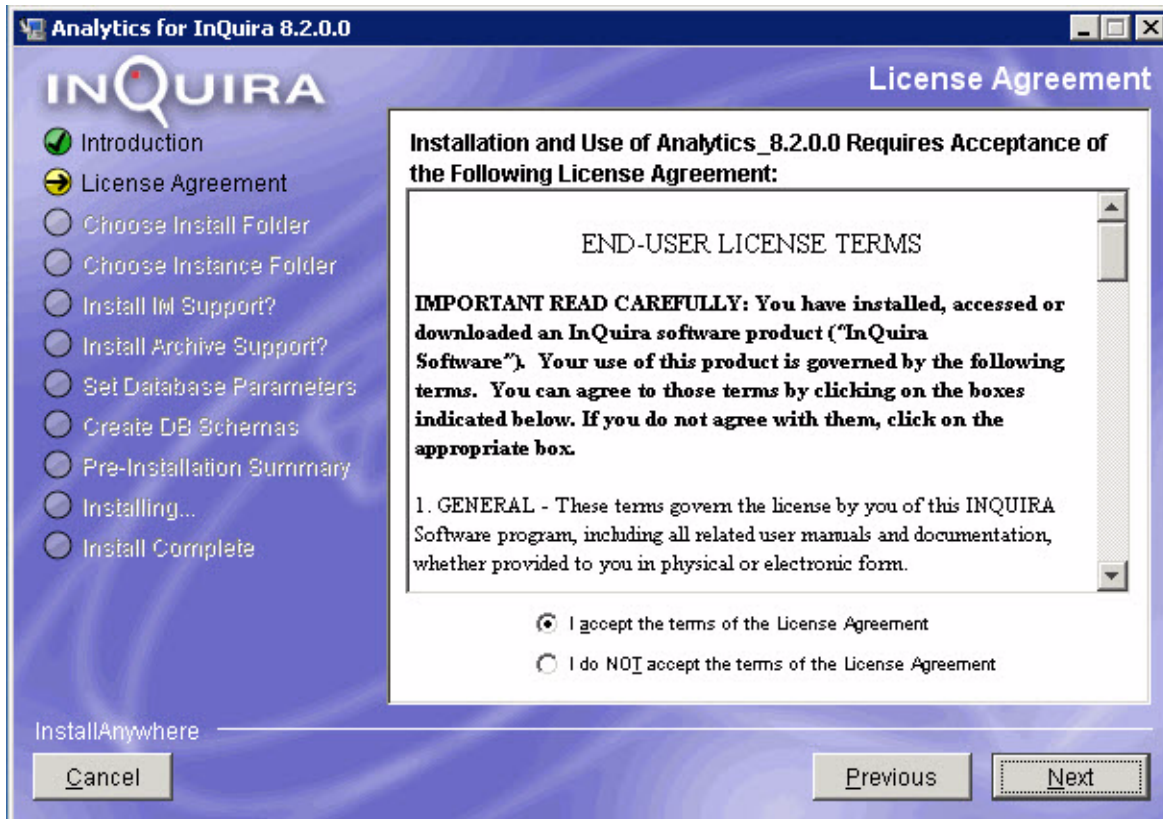


2. The Introduction screen displays.



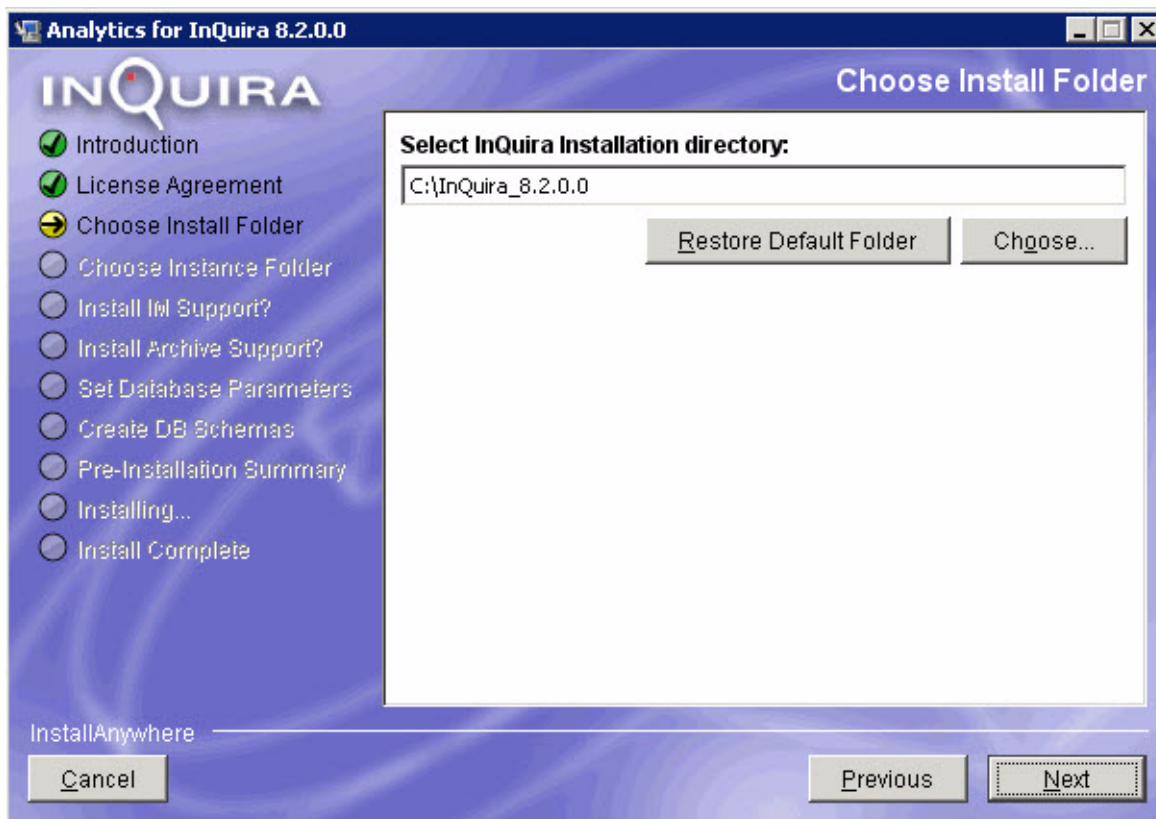
- It is strongly recommended that you quit all programs before continuing with the installation.
- Select **Next**.

3. The InQuira Analytics License Agreement screen displays.



- Read the license agreement carefully; by agreeing, you are legally bound to its terms and conditions.
- Select **I accept the terms of the License Agreement**.
- Select **Next**.

4. The **Choose Install Folder** screen displays.



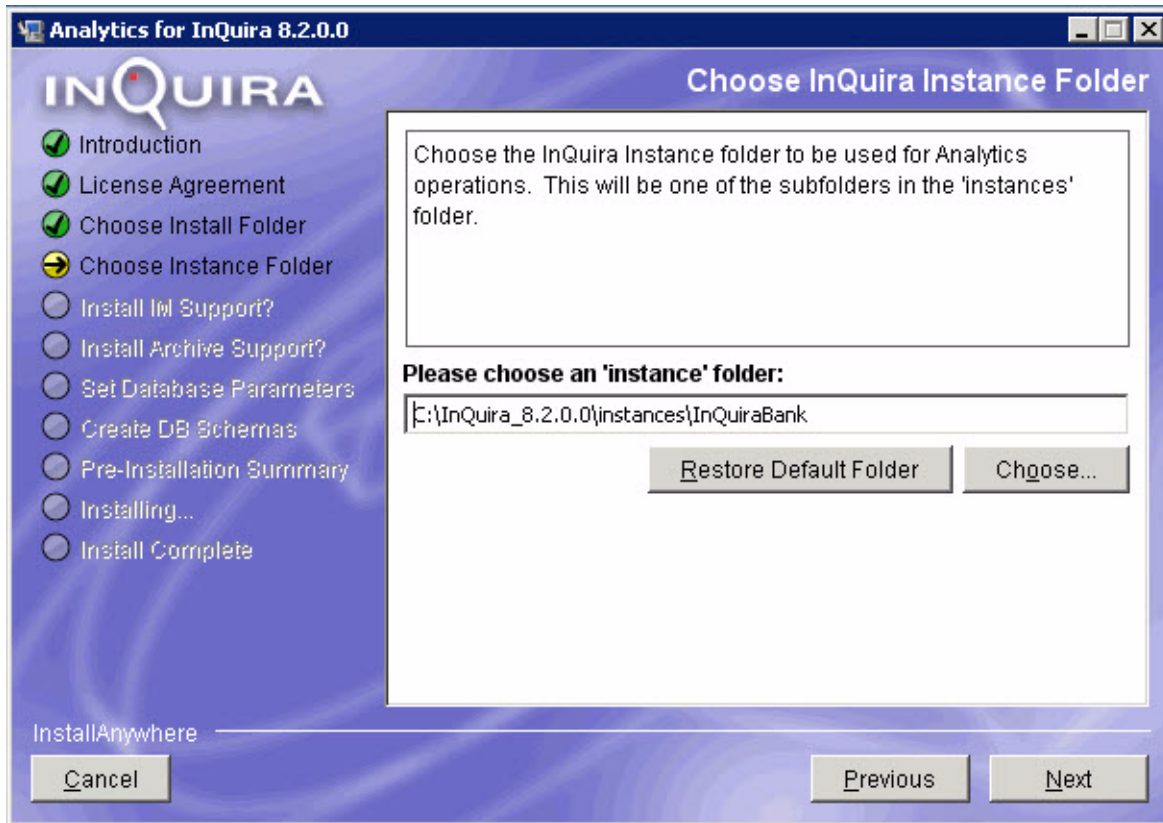
- Select the location of the InQira 8.2 installation into which you want to install InQira Analytics. The installation program selects a default location:  
C:\InQira\_8.2 in Windows environments or <user\_home>/InQira\_8.2 in Solaris and Linux environments  
You can use the **Choose...** button to open a file explorer and select an alternate location.  
Use the **Restore Default Folder** button to reset the default installation directory, if necessary.
- Select **Next**.

---

**NOTE:** The installation program checks to see that an InQira 8.2 instance has been properly installed. If it does not find the folders and files it is expecting, an error message is displayed.

---

5. The Choose InQira 8.2 Instance Folder screen displays.



- Select the location of the InQira 8.2 instance folder to be used for InQira Analytics. The location needs to be one of the subfolders in the instances folder. The installation program selects a default location:

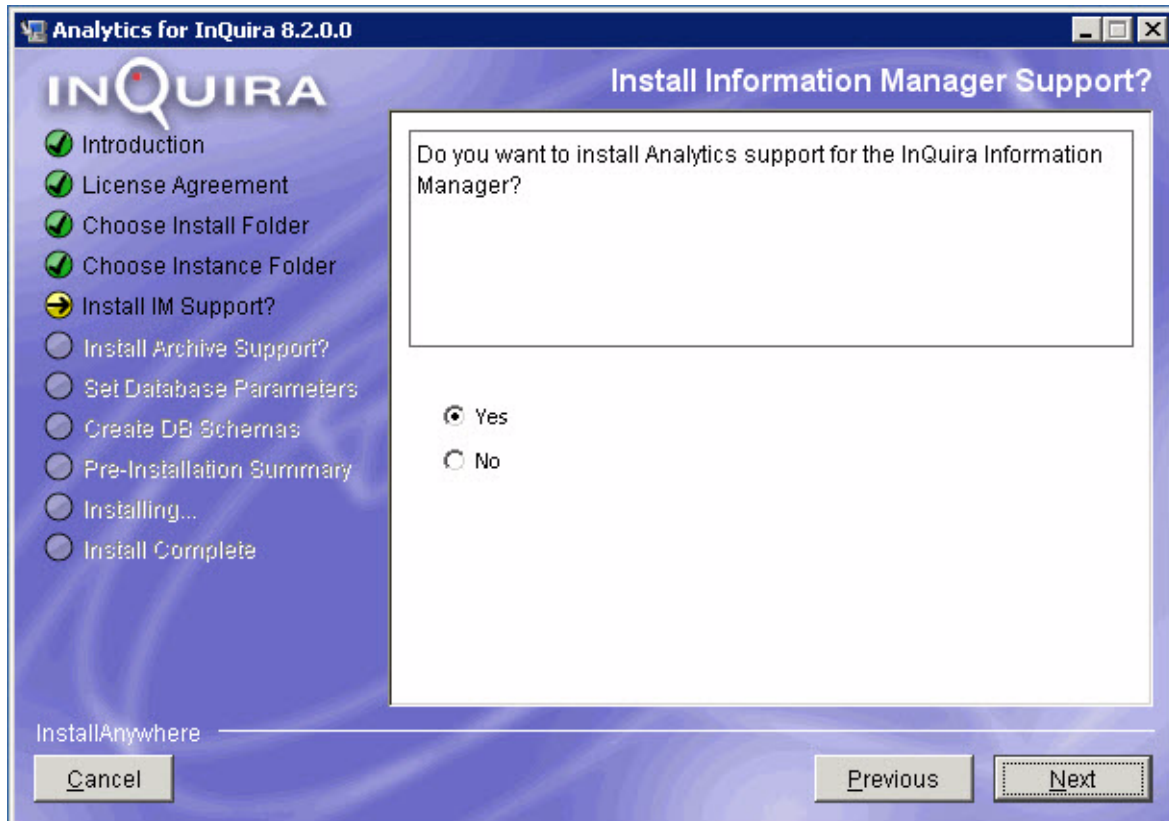
C:\InQira\_8.2\instances\ in Windows environments or <user\_home>/InQira\_8.2\instances in Solaris and Linux environments.

You can use the **Choose...** button to open a file explorer and select an alternate location.

Use the **Restore Default Folder** button to reset the default installation directory, if necessary.

- Select **Next**.

6. The Install Information Manager Support screen displays.

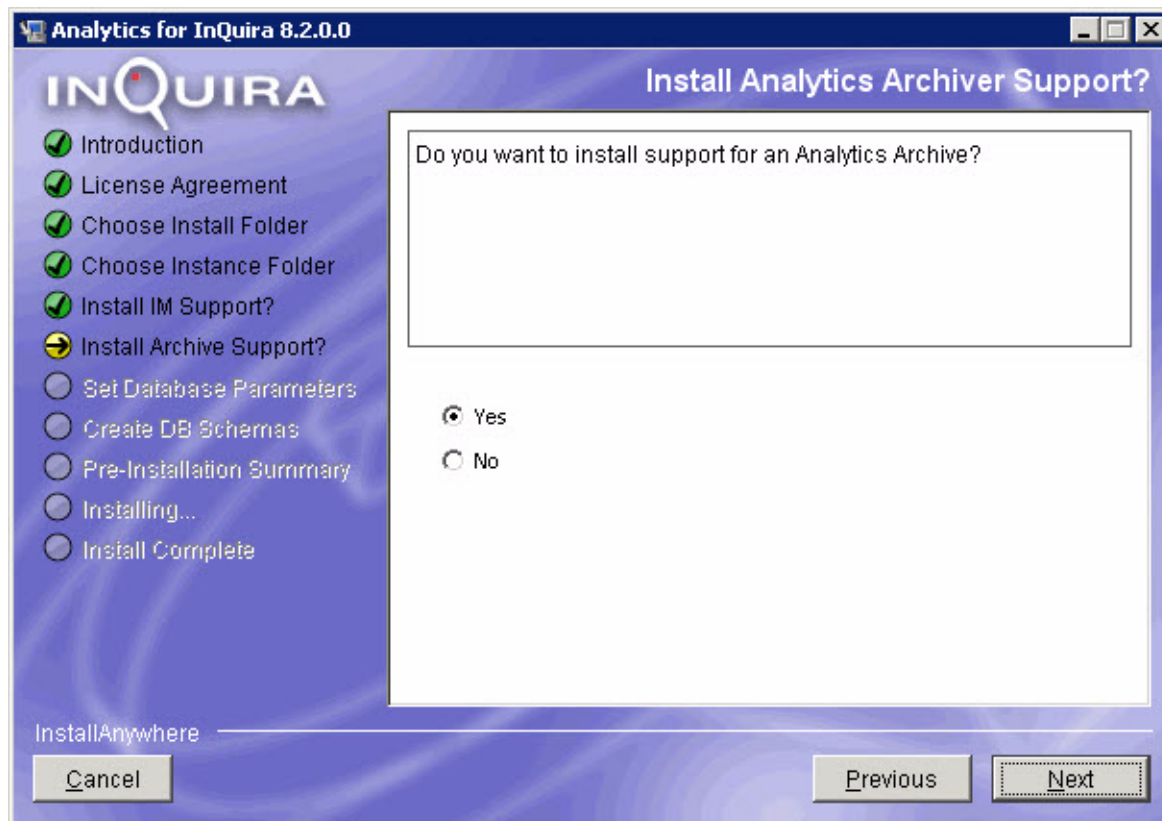


- Select **Yes** or **No**.

If you select Yes, Information Manager Analytics will be installed. You must have InQira Information Manager already installed before selecting yes.

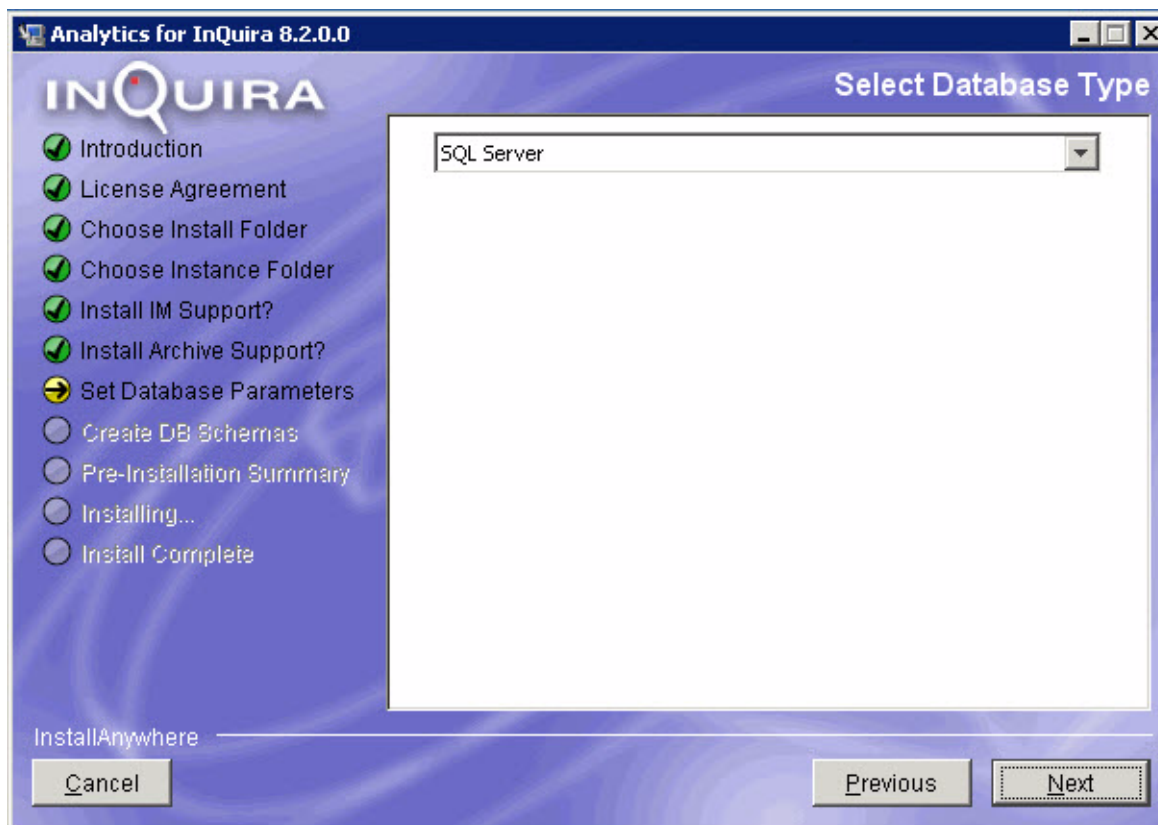
- Select **Next**.

7. The Install Analytics Archiver Support screen displays.



- Select **Yes** or **No**.  
Selecting Yes will install an Analytics Archive.
- Select **Next**.

8. The Set Analytics Database Parameters screen displays.



- Set the database parameters for the Analytics Database.

---

**NOTE:** The database for Analytics and the database for the Analytics Archive must be separate

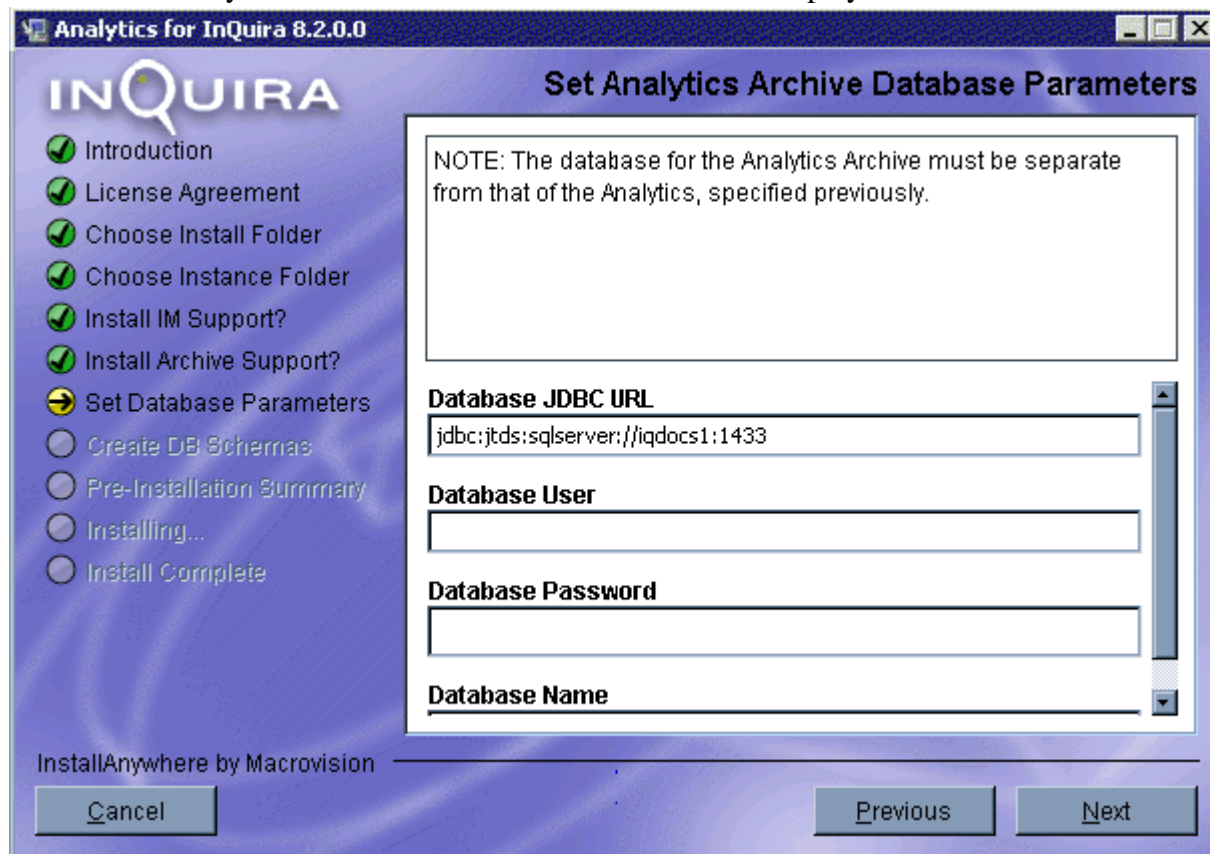
---

- Select **Next**.  
If you selected Yes on the Install Analytics Archive Support screen the *Set Analytics Archive Database Parameters* screen displays (see [Setting InQira Analytics Archive Database Parameters on page 26](#)).  
If you selected No on the Install Analytics Archive Support screen the *Create DB Schemas screen* displays (see [Creating InQira Analytics Databases on page 27](#)).

## Setting InQuira Analytics Archive Database Parameters

---

The Set Analytics Archive Database Parameters screen displays.



- Set the database parameters for the Analytics Archive Database.

---

**NOTE:** The database for Analytics and the database for the Analytics Archive must be separate

---

- Select **Next**.

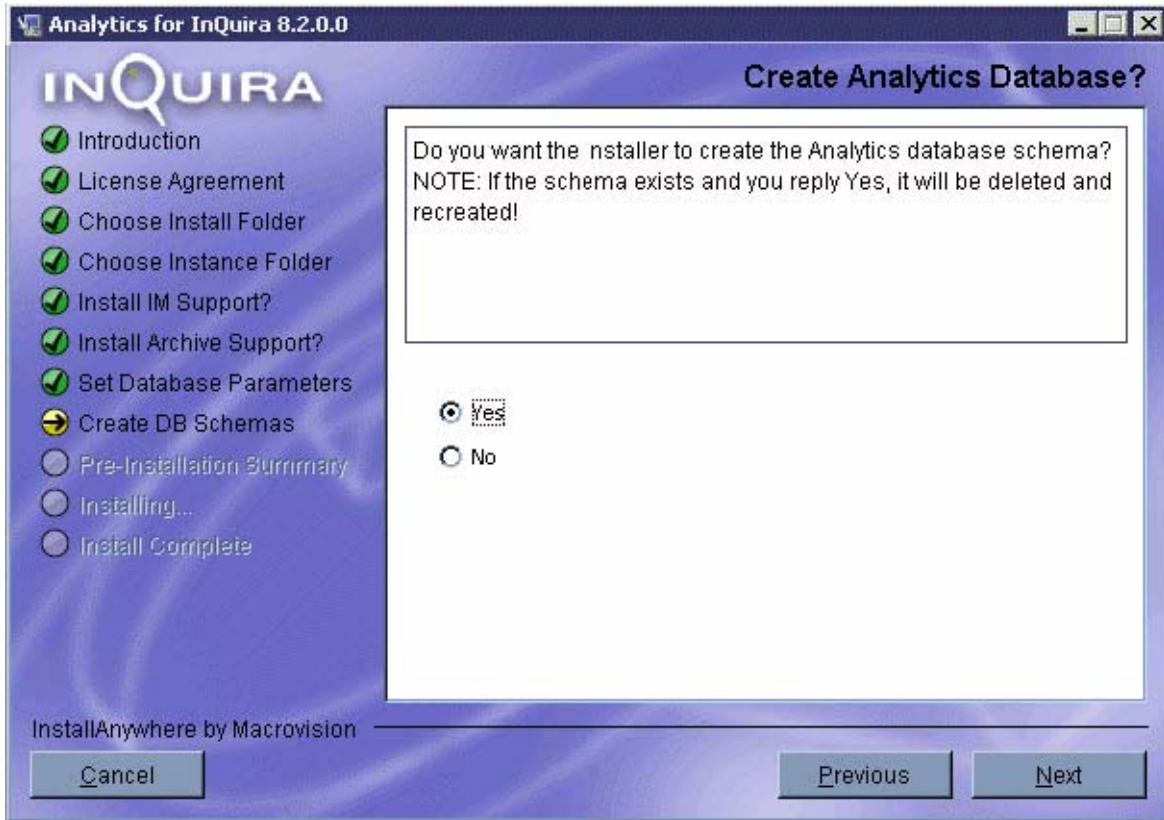
The *Create Analytics Database* on screen appears (see [Creating InQuira Analytics Databases on page 27](#)).



## Creating InQira Analytics Databases

---

The Create Analytics Database screen displays.



- Select **Yes** or **No**.

---

**NOTE:** If you select yes, and the schema already exists it will be deleted and recreated.

---

- Select **Next**.

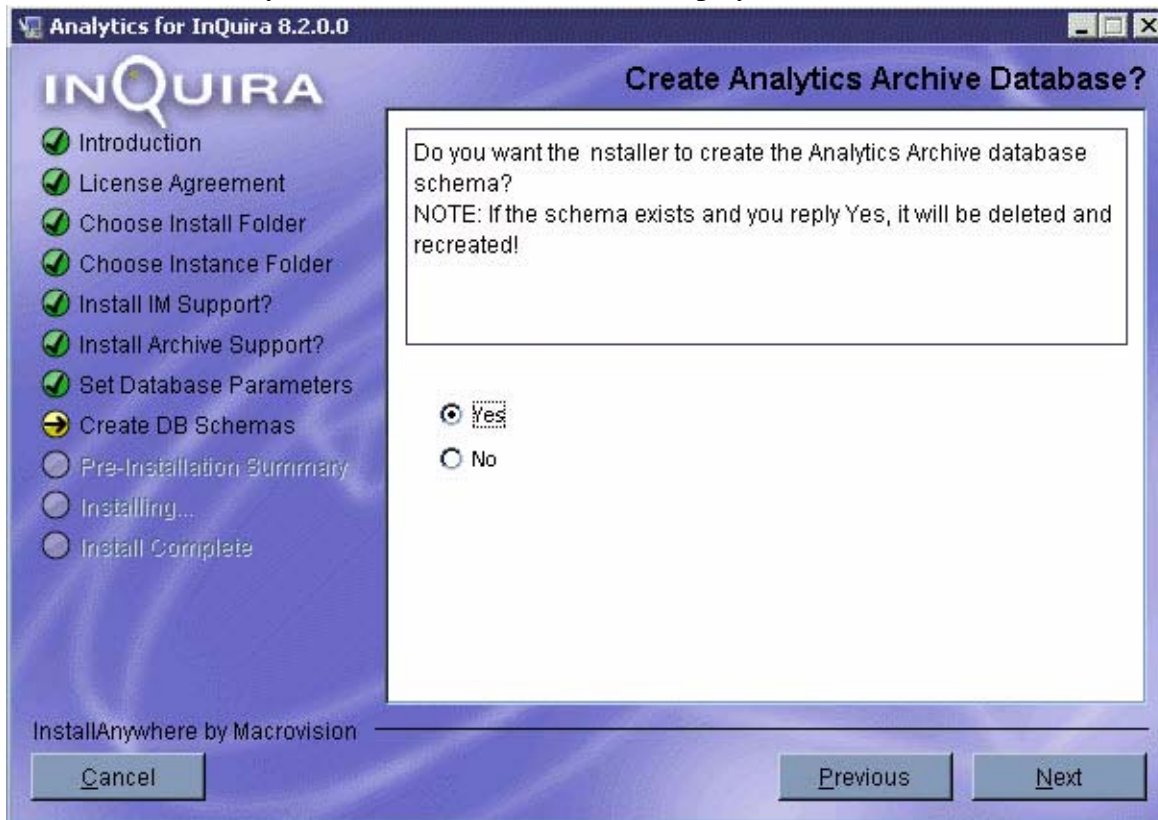
If you selected Yes on the Install Analytics Archive Support screen the *Create Analytics Archive Database* see [Create InQira Analytics Archive Database on page 28](#) screen displays.

If you selected No on the Install Analytics Archive Support screen the *Pre-Installation Summary* see [The Pre-Installation Summary on page 29](#) screen displays.

## Create InQuira Analytics Archive Database

---

The Create Analytics Archive Database screen displays.



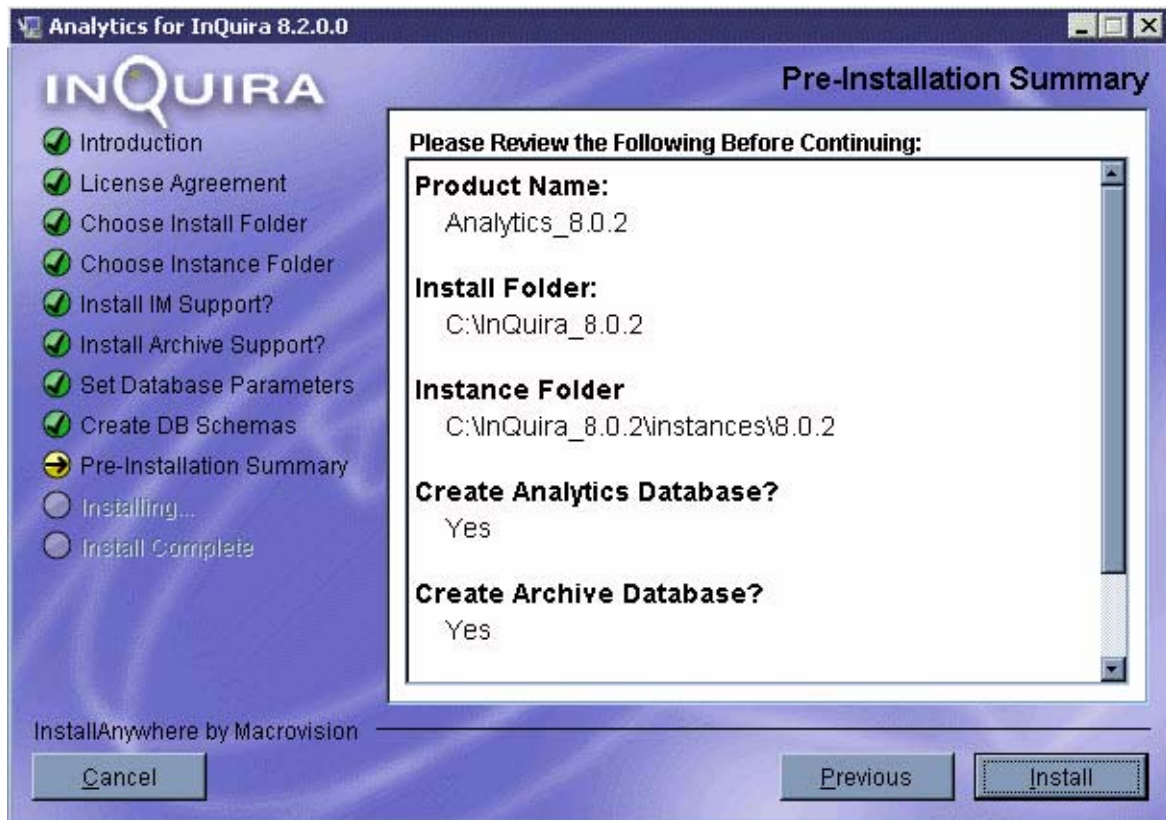
- Select **Yes** or **No**.  
If you select **Yes**, and a schema already exists it will be deleted and recreated.
- Select **Next**.

The *Pre-Installation Summary* see [The Pre-Installation Summary on page 29](#) screen displays.

## The Pre-Installation Summary

---

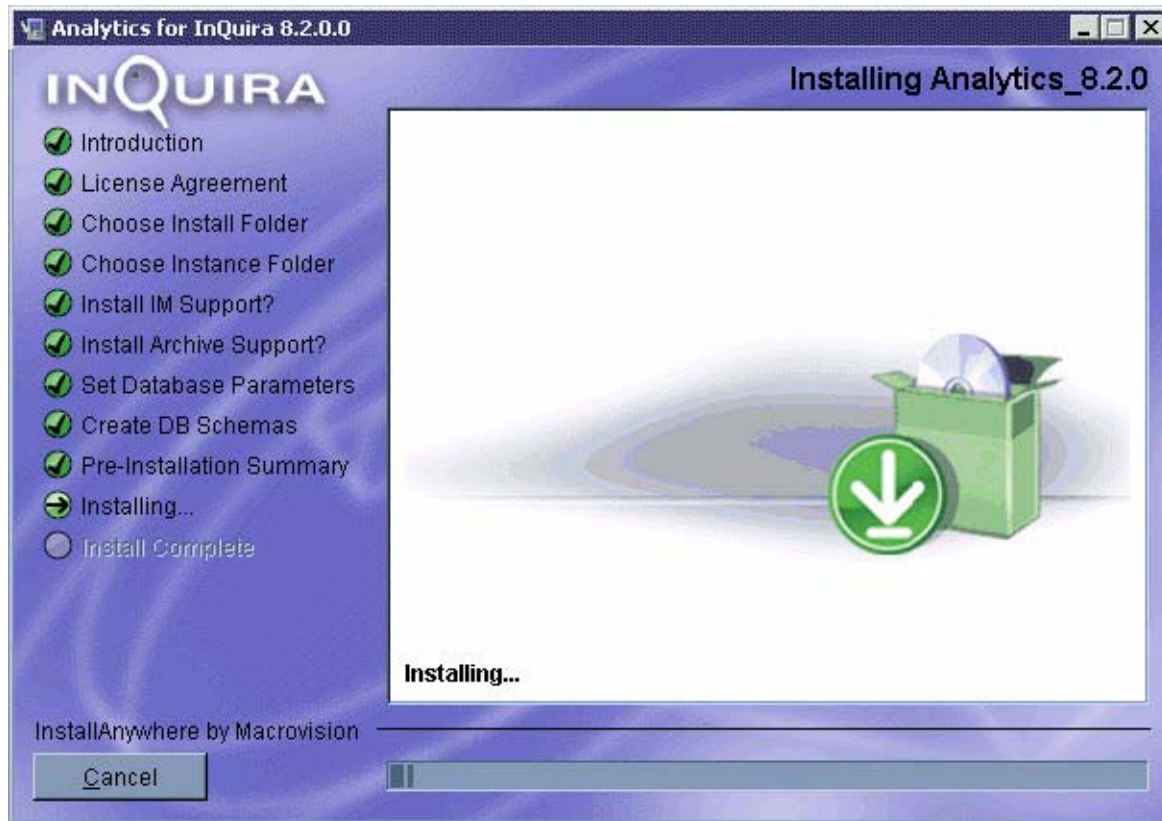
1. The pre-installation summary screen displays.



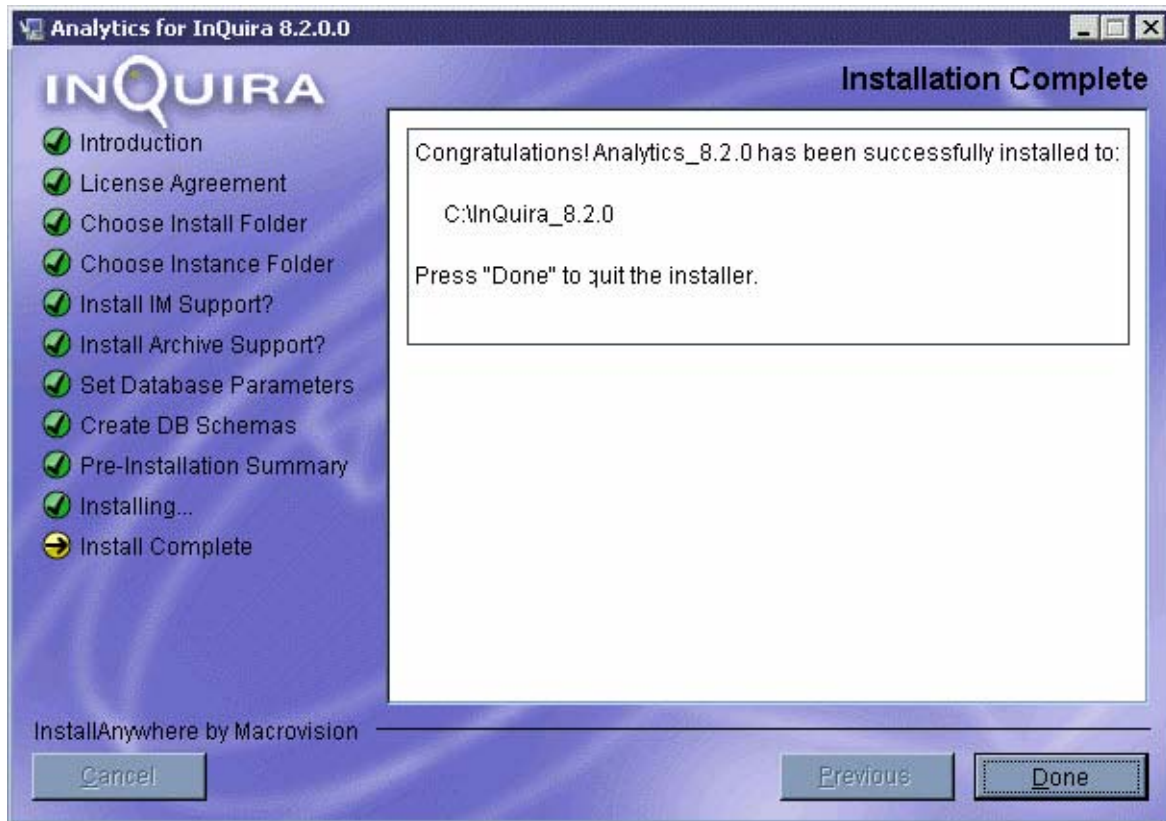
- Review your selections.
- Use the **Previous** button to make any corrections.
- Select **Install** to continue.

The installation program begins installing InQira Analytics in the specified location.

2. The installation program displays a progress screen during installation:



3. The completion screen summarizes the installation process. The InQuira Analytics component directories and files are now installed in the specified location.



- Select **Done** to exit the installation program.

The installation program executes its cleanup routines and terminates.



## Chapter 3      Creating the ODBC DSN

After the installation program completes, you must create three separate ODBC DSNs.

Create data sources for each of the following:

- InQira 8.2 Analytics Database
- InQira 8.2 IM OLTP Database
- InQira 8.2 Search Archive Database

### Creating an ODBC DSN

---

To create an ODBC DSN for the necessary InQira Analytics databases (three in total):

- Select **Data Sources (ODBC)** from the Start menu (Start > Programs > Administrative Tools > Data Sources)

The ODBC Data Source Administrator displays.

- Select the **System DSN** tab, and select **Add**

The Create New Data Source window prompts you to select a driver from the list.

- Select **SQL/Oracle Server** and select **Finish**
- If using Linux, select **MicroStrategy ODBC Driver for Oracle Wire Protocol** and select **Finish**

The Create New Data Source to SQL/Oracle Server prompts you to specify:

- Name
- Description
- Server

## Naming the data sources

---

Create separate data sources for each of the following:

- InQuira 8.2 Analytics Database
- InQuira 8.2 IM OLTP Database (the Information Manager and OLTP data sources are the same)
- InQuira 8.2 Search Archive Database



## Chapter 4      Creating the InQuira Analytics Metadata Database

After you complete the InQuira Analytics installation you must open the Installation Configuration Environment and run the following script to create a metadata database.

This metadata database schema is used to store information about report definitions and security.

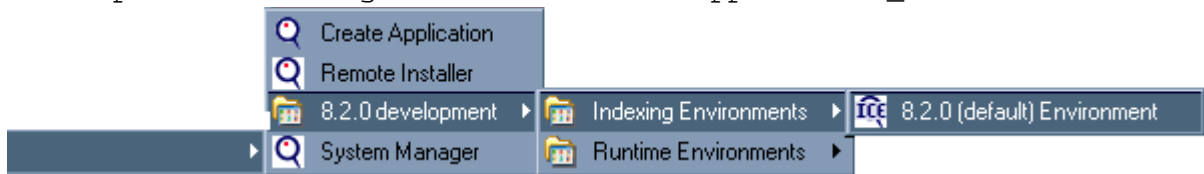
### Opening the Installation Configuration Environment

---

To start the Installation Configuration Environment:

- Select the Installation Configuration Environment item for the desired instance:

```
Start => Programs => InQuira 8.2 => <application_name>  
development=>Indexing Environments => <application_name> Environment
```



The Installation Configuration Environment screen displays.

```
C:\ 8.2.0 (default) Environment
APROOT      = [C:\InQuira_8.0.2\instances\8.0.2]
JAVA_HOME   = [C:\InQuira_8.0.2\jre]

-----
Setting CLASSPATH:
-----
Prepending InQuira Libraries:
-----
Prepending Professional Services Libraries:
-----
C:\InQuira_8.0.2\lib\ice.jar
C:\InQuira_8.0.2\lib\wrapper.jar
-----
Prepending Patches:
-----
No Patches Found

-XX:+ManagementServer -XX:MaxHeapSize=1468006400 -XX:+PrintCommandLineFlags -XX:
+PrintGC -XX:+TraceClassUnloading
You are using: InQuira 8.0 (T3) Build 8
in this development environment.

InQuira C:\InQuira_8.0.2\instances\8.0.2->
```

## Running the Create Metadata Script

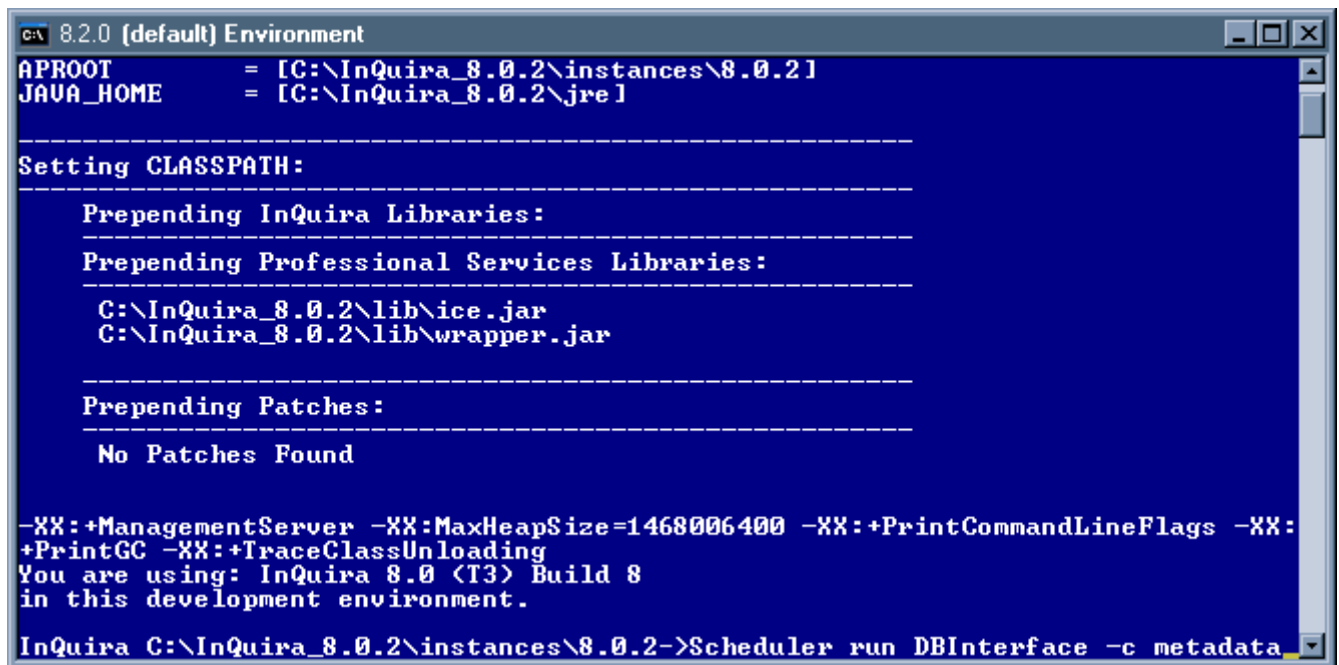
---

- In a Windows environments, execute the following command in the Installation Configuration Environment on the InQira Analytics server:

**scheduler run DBInterface -c metadata**

- In Solaris environments, execute the following command in the Installation Configuration Environment on the InQira Analytics server:

**scheduler.sh run DBInterface -c metadata**



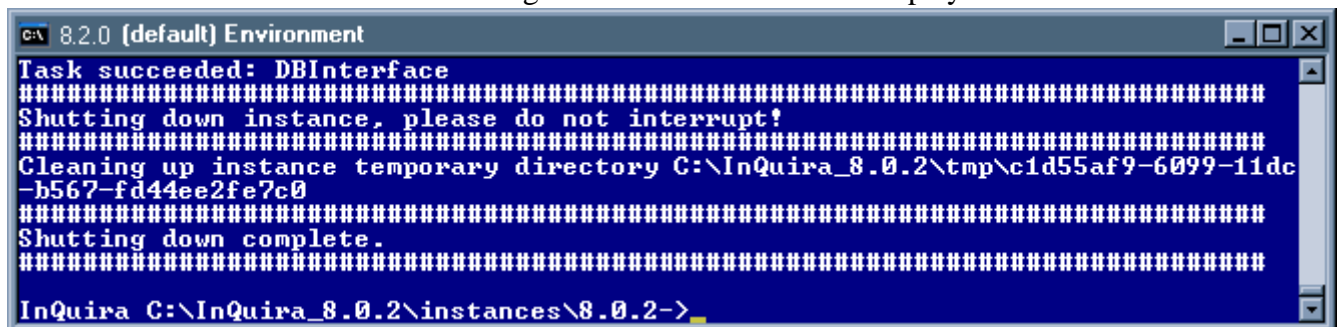
```
C:\> 8.2.0 (default) Environment
APROOT      = [C:\InQira_8.0.2\instances\8.0.2]
JAVA_HOME   = [C:\InQira_8.0.2\jre]

-----
Setting CLASSPATH:
-----
Prepending InQira Libraries:
-----
Prepending Professional Services Libraries:
-----
C:\InQira_8.0.2\lib\nice.jar
C:\InQira_8.0.2\lib\wrapper.jar
-----
Prepending Patches:
-----
No Patches Found

-XX:+ManagementServer -XX:MaxHeapSize=1468006400 -XX:+PrintCommandLineFlags -XX:
+PrintGC -XX:+TraceClassUnloading
You are using: InQira 8.0 (T3) Build 8
in this development environment.

InQira C:\InQira_8.0.2\instances\8.0.2->Scheduler run DBInterface -c metadata
```

When finished the Installation Configuration Environment will display:



```
C:\> 8.2.0 (default) Environment
Task succeeded: DBInterface
#####
Shutting down instance, please do not interrupt!
#####
Cleaning up instance temporary directory C:\InQira_8.0.2\tmp\c1d55af9-6099-11dc-
b567-fd44ee2fe7c0
#####
Shutting down complete.
#####

InQira C:\InQira_8.0.2\instances\8.0.2->
```



## Chapter 5 Installing and Configuring the InQuira Analytics Report Server

This section provides an overview of the MicroStrategy installation and configuration process to install and configure the MicroStrategy software that supports InQuira Analytics report creation and presentation.

Please consult the MicroStrategy installation and configuration documentation for more detailed information.

### Installing the MicroStrategy Components

---

To install the MicroStrategy components:

- Navigate to the InQuira Analytics installation location, and locate the MicroStrategy folder
- Execute the Setup program

After successful installation and reboot, MicroStrategy will automatically start the configuration process.

---

**NOTE:** If the configuration process does not start automatically, start it manually as described in [Configuring the MicroStrategy Components on page 44](#).

---

The MicroStrategy installation page displays.

- Select **Install Software** from the installation page options

The MicroStrategy product selection page displays.

## Selecting the Language for the Installation

---

The installation language selection dialog prompts you to select a language for the installation process. The default is English.

- Select the desired language

The *product installation program* starts, as described in [Installing the Selected Products on page 40](#).

## Installing the Selected Products

---

The product installation program informs you of the selected product. Verify that you are installing MicroStrategy 8.1.1.

- Select **Next**.

The *MicroStrategy license agreement* displays, as described in [Accepting the MicroStrategy License Agreement on page 40](#).

## Accepting the MicroStrategy License Agreement

---

The MicroStrategy license agreement specifies the legal terms of use. You must agree to these terms to install and use the software.

The installation program sets the license agreement to non-acceptance by default. To accept the license agreement and continue the installation:

- Select the accept option

The **Next >** button is now available.

- Select **Next >** to continue

The *Customer Information* screen displays, as described in [Specifying Customer Information on page 40](#).

## Specifying Customer Information

---

The Customer Information screen prompts you for the user information and a license key.

---

**NOTE:** Contact InQuira Customer Support for license key information.

---

- Enter the appropriate user and license information

- Select **Next**

The *installation type selection* screen displays, as described in [Selecting the Installation Type on page 41](#).

## Selecting the Installation Type

---

The installation type selection screen prompts you to select an installation. Typical is the default.

- Select **Typical**,
- Select **Next**

The *installation location selection* screen displays, as described in [Selecting the Installation Location on page 41](#).

## Selecting the Installation Location

---

The installation location selection screen prompts you to select an installation folder. The default is C:\Program Files\MicroStrategy.

- Select the appropriate folder
- Select **Next**.

The *component selection* screen displays, as described in [Selecting the Components to Install on page 41](#).

## Selecting the Components to Install

---

The component selection screen displays the available MicroStrategy products for installation.

- In order to use InQuira Analytics, you must install the following products:
  - MicroStrategy Desktop (Desktop Designer, MicroStrategy Server Administration)
  - Intelligence Server
  - Web (Web Professional)
- Select **Next**.

The *stop web server message* displays, as described in [Stopping Your Web Server on page 42](#).

## Stopping Your Web Server

---

The installation program displays a message stating that it will stop and re-start the web server as required for the installation.

- Select **Yes** to have the installation program stop and re-start the web server  
or
- Manually stop the web server
- Select **Next >** to continue

The *MicroStrategy Web (ASP.Net) Setting* screen displays, as described in [MicroStrategy Web \(ASP.Net\) Setting on page 42](#).

## MicroStrategy Web (ASP.Net) Setting

---

The MicroStrategy Web (ASP.net) setting screen displays.

- Specify the name of the virtual directory that will be used by MicroStrategy. This name will be a part of the URL used to access analytics reports through the web.
- Select **Next**.

The *Selecting the Program Folder* screen displays, as described in [Selecting the Program Folder on page 42](#).

## Selecting the Program Folder

---

The program folder selection screen prompts you to select the program folder. The default is MicroStrategy.

- Select an appropriate program folder
- Select **Next**.

The *MicroStrategy Intelligence Server Setting* screen displays, as described in [MicroStrategy Intelligence Server setting on page 42](#).

## MicroStrategy Intelligence Server setting

---

The MicroStrategy Intelligence Server setting screen displays.

- Fill in the Login and Password used to access the Windows account that MicroStrategy will use to log onto the system



- Select **Next**.

The Start *Copying the Select Component Files* summary screen displays, as described in [Copying the Selected Component Files on page 43](#).

## Copying the Selected Component Files

---

The installation program provides a summary of your installation selections prior to copying the program files.

- Review your selections
- Select **Install**.

The installation program copies the selected program files to the specified location.

## Installing MicroStrategy Files

---

The installation program displays the status of the installation process.

After the installation process is complete, you will be asked to *activate MicroStrategy*, as described in [Installing MicroStrategy Files on page 43](#).

## Activating MicroStrategy

---

After the installation process is complete, you will need to activate MicroStrategy.

The Server Activation screen displays.

- Fill out the required information
- Select **Next**.

The Installer's Information screen displays.

- Fill out required information.
- Select **Next**.

The Request Activation Code screen displays.

- Select to have activation code sent now, or later.
- Select **Next**.

When the installation is complete, the program prompts you to open the ReadMe file

- Select either option as desired

The *installation program completes*, as described in [Completing the Installation Process on page 44](#).

## Completing the Installation Process

---

The installation program prompts you to restart the computer prior to performing the configuration process.

- Remove any disks from their drives.
- Select **Finish** to complete the installation process.

---

**NOTE:** The MicroStrategy configuration process will start automatically when the computer re-starts. Follow the configuration steps, as described in [Configuring the MicroStrategy Components on page 44](#).

---

## Configuring the MicroStrategy Components

---

After Microstrategy is installed you must configure a new project source that will be used to access all InQuira Analytics reports stored in the databases configured in [Chapter 3, Creating the ODBC DSN](#).

## Creating a New Project Source

---

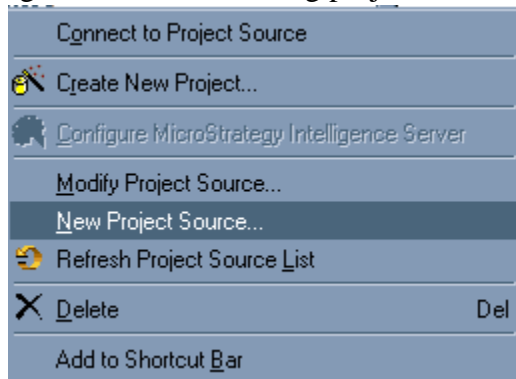
---

NOTE: The Configuration Wizard opens automatically upon restarting. Exit this program.

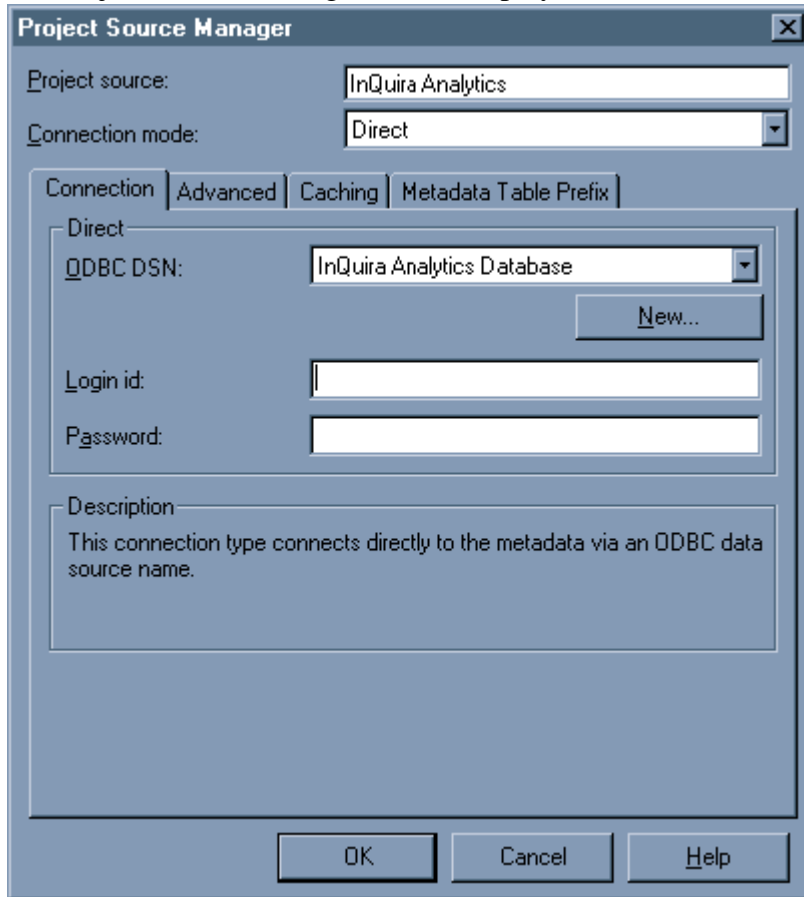
---

To create a new project source you:

- Open the Microstrategy Desktop  
(the default login is Administrator with no password)
- Right-click on an existing project and select **New Project Source...**



The Project Source Manager screen displays.



- Enter a new project source name in the Project Source field.
- Select **Direct** Connection mode.
- Select InQira Analytics Database as the ODBC DSN.
- Enter the Login id and password.
- Select **OK**.

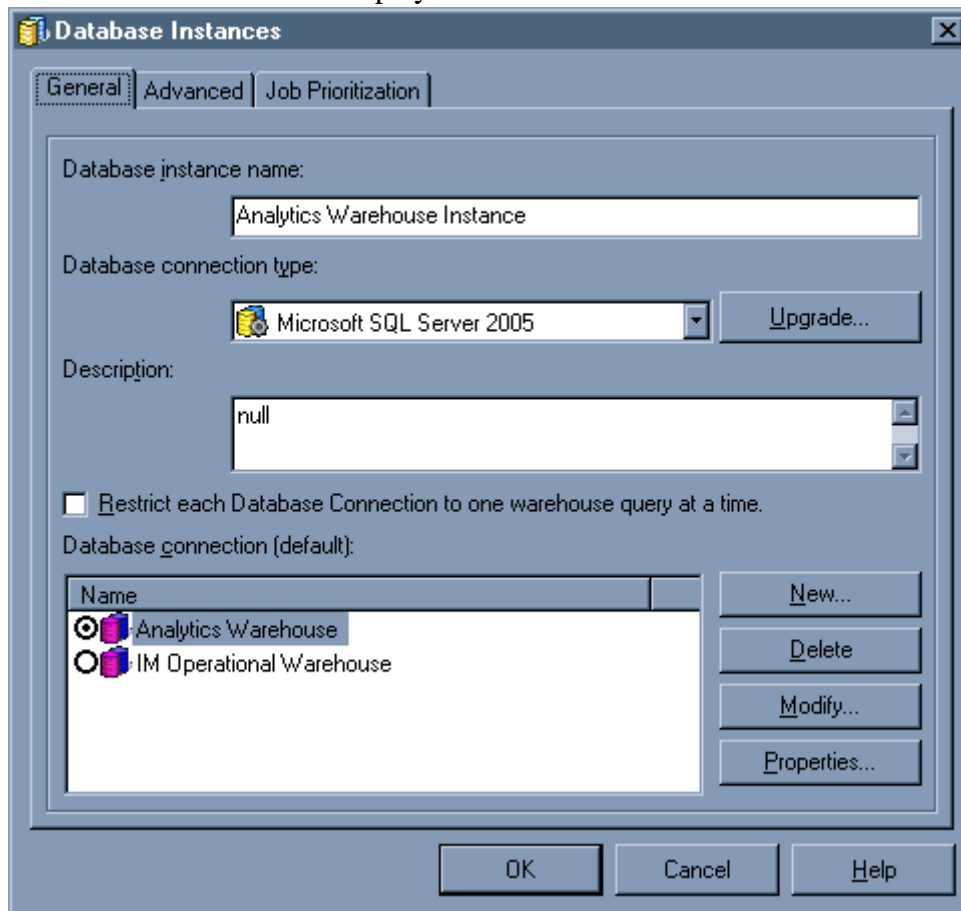
The newly created project source will appear on the Microstrategy Desktop screen.

## Configuring the Analytics Warehouse Instance

After creating a new project source you must configure the IM and Search Analytics datasource.

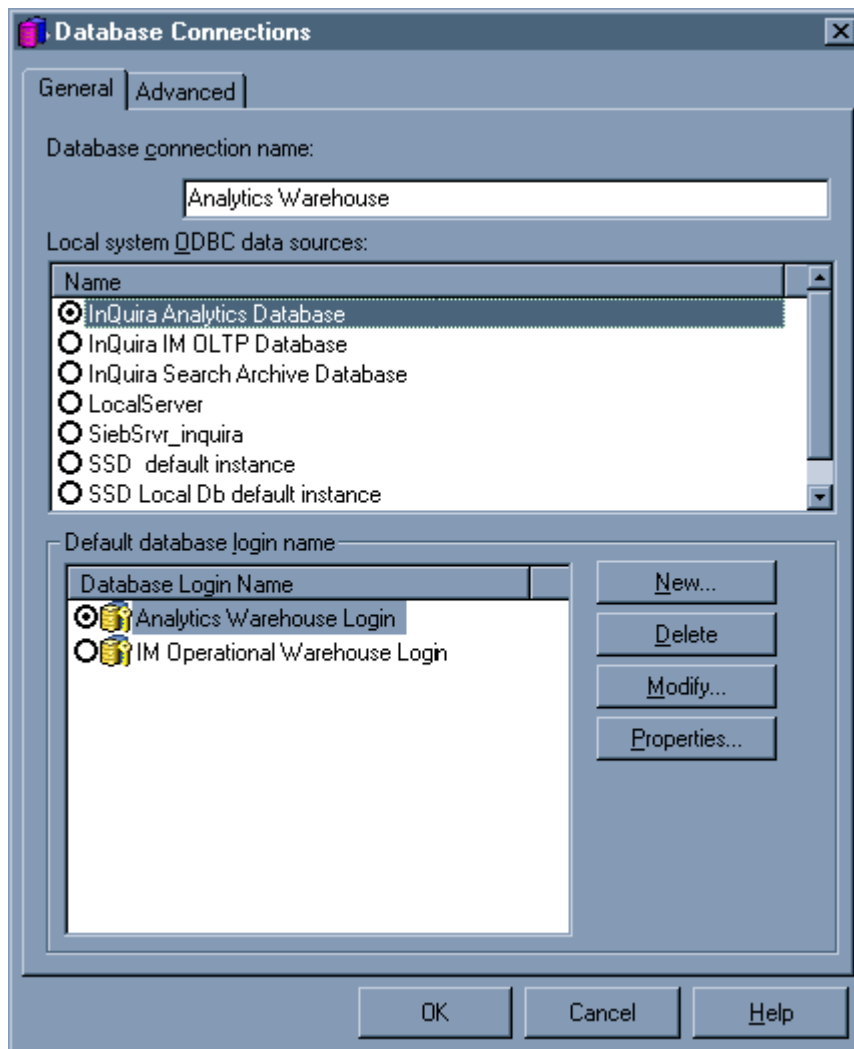
- Open the newly created Project source.
- Open Administration.
- Open the Database Instance Manager.

The Database Instance Screen displays.



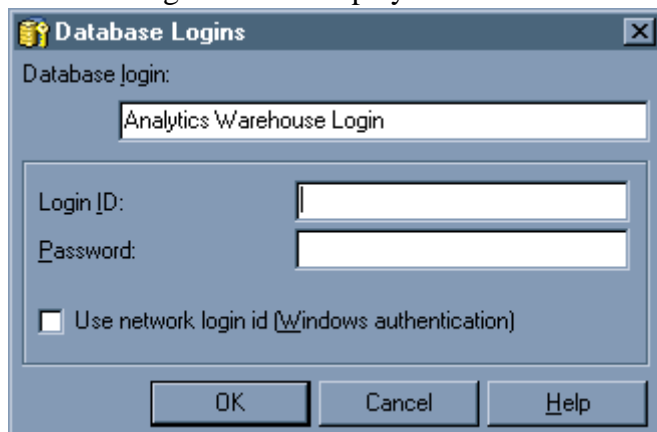
- Select Analytics Warehouse Instance.
- Select Modify

The Database Connection screen displays.



- Select Analytics Warehouse Instance
- Confirm the local system ODBC data source selected is the database created for InQuira Analytics Database
- Select Modify.

The Database Logins screen displays.



- Fill in the Login ID and password created for the InQira Analytics Database.
- Select OK.
- Select OK.
- Select OK.

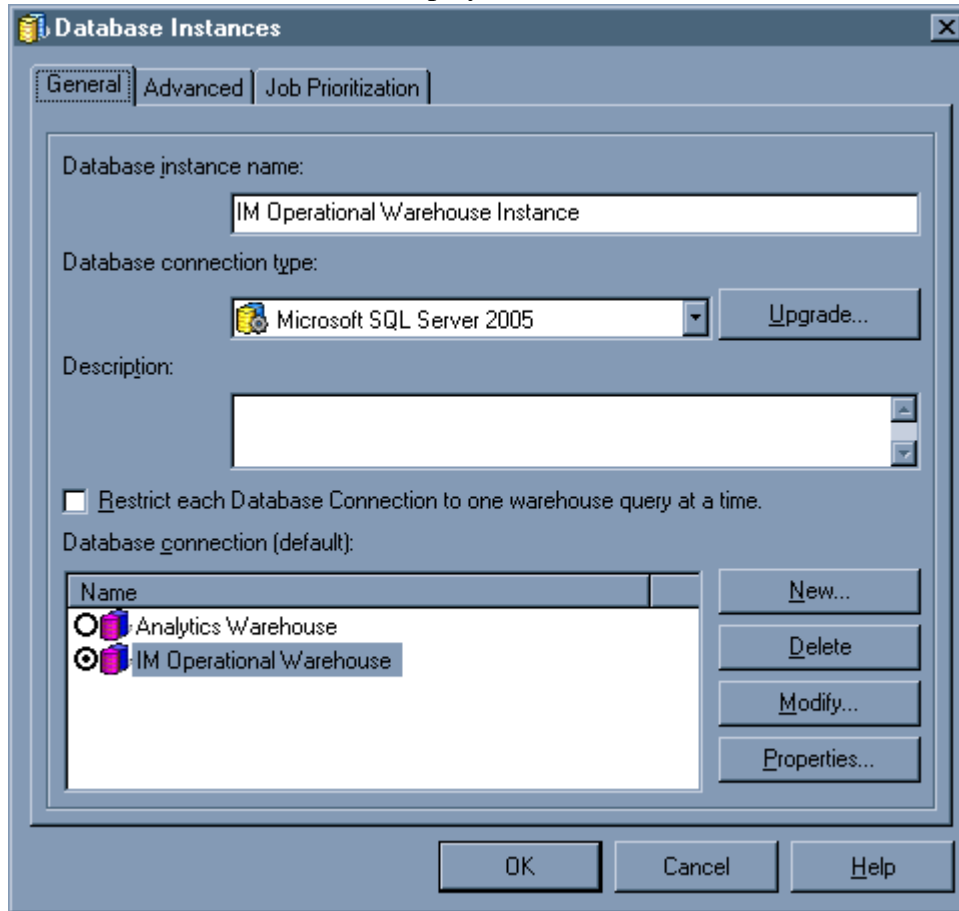
Repeat these steps to *configure the IM Operational Warehouse*, as described in [Configuring the IM Operational Warehouse Instance](#) on page 49.

## Configuring the IM Operational Warehouse Instance

After creating a new project source you must configure the IM Operationaldatasource.

- Open the newly created Project source.
- Open Administration.
- Open the Database Instance Manager.
- Select IM Operational Warehouse Instance

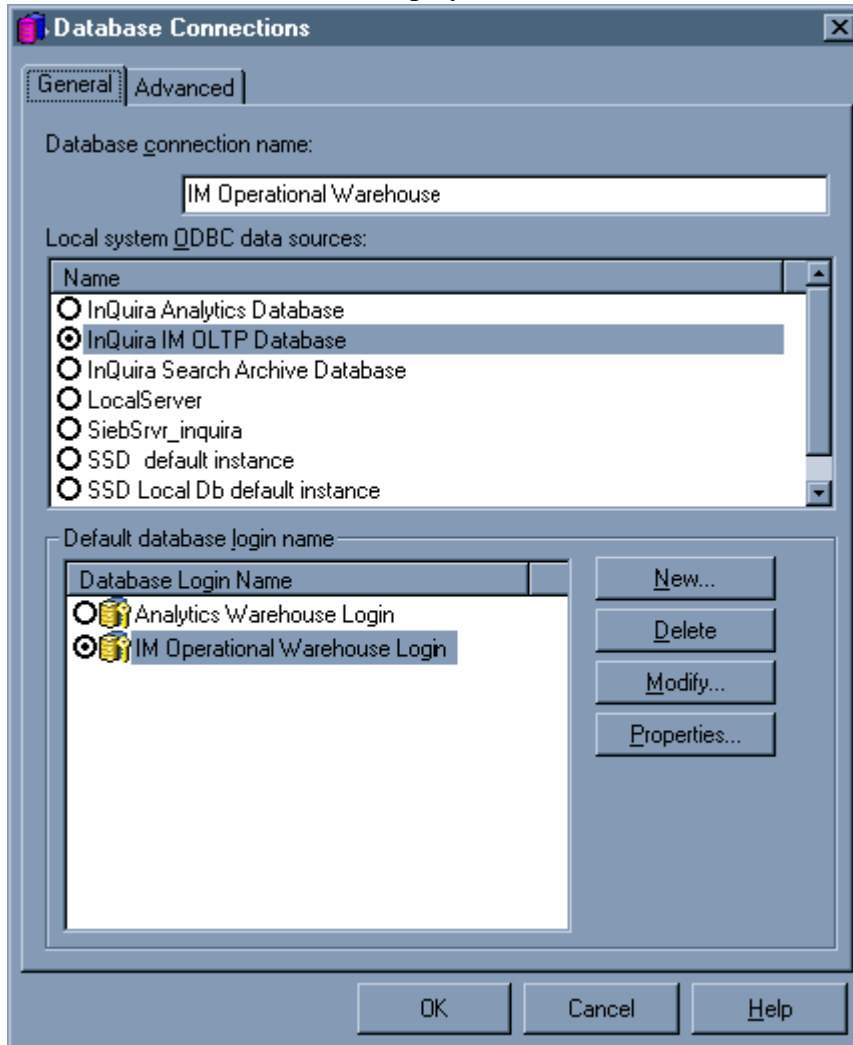
The Database Instance Screen displays.



- Select IM Operational Warehouse Instance.
- Select Modify

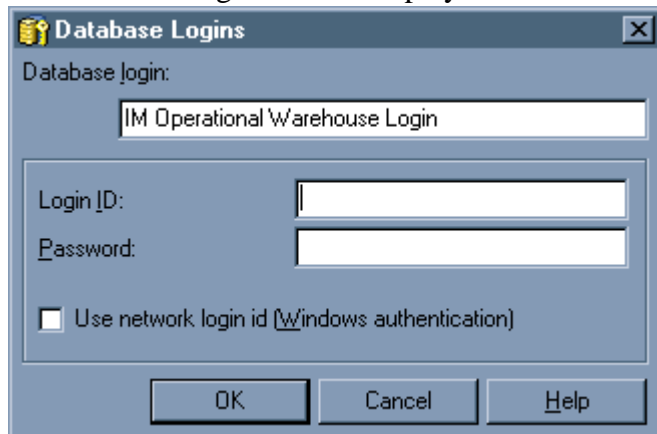


The Database Connection screen displays.



- Select IM Operational Warehouse Instance
- Confirm the local system ODBC data source selected is the database created for InQira IM OLTP Database
- Select Modify.

The Database Logins screen displays.



- Fill in the Login ID and password created for the InQira IM OLTP Database.
- Select OK.
- Select OK.
- Select OK.

The configuration of the new project source is now completed.

## Configuring the Web-based InQira Analytics User Interface

---

Execute the following to configure the web-based InQira Analytics user interface:

- Open the following directory:  
    <Instance\_Name>\analytics\common\MSTR\_UI\Dotnet
- Execute InQiraBrand.bat.

---

**NOTE:** If you installed InQira Analytics on a Linux server you may need to refer to your Customer Support. (s2060)

---

## Deploying the Project to the Web

---

The following steps will enable you to view InQira Analytics reports from the web at <http://localhost/MicroStrategy/asp> .

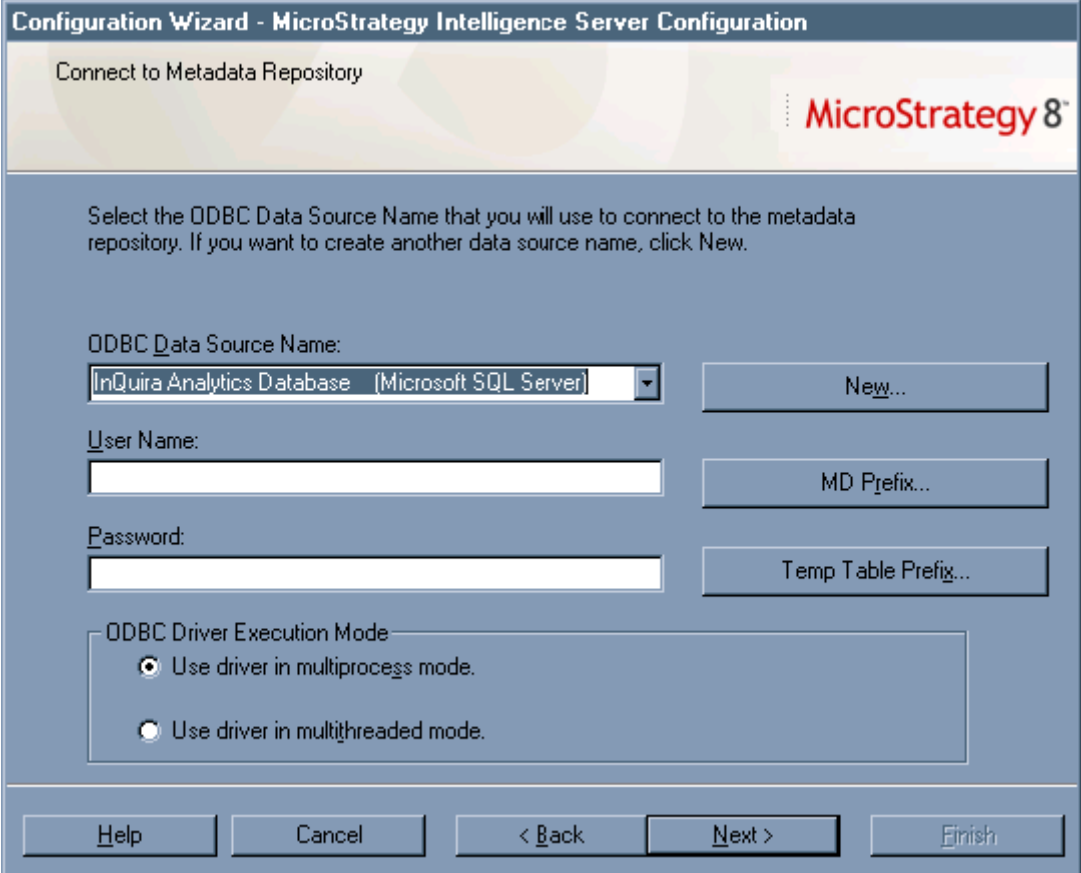
### Starting the MicroStrategy Configuration Wizard

To start the configuration process:

- Open MicroStrategy Configuration Wizard.
- Select **Set up MicroStrategy Intelligence Server**.
- Select **Next**.

### Specifying the Data Source for the Metadata Repository

The Connect to Metadata Repository screen displays.



The screenshot shows the 'Configuration Wizard - MicroStrategy Intelligence Server Configuration' dialog box. The title bar reads 'Configuration Wizard - MicroStrategy Intelligence Server Configuration'. The main window has a header with 'Connect to Metadata Repository' and the MicroStrategy 8 logo. Below the header, there is a text box that says: 'Select the ODBC Data Source Name that you will use to connect to the metadata repository. If you want to create another data source name, click New.' The form contains several fields and buttons: 'ODBC Data Source Name:' with a dropdown menu showing 'InQira Analytics Database (Microsoft SQL Server)' and a 'New...' button; 'User Name:' with a text input field and an 'MD Prefix...' button; 'Password:' with a text input field and a 'Temp Table Prefix...' button; and 'ODBC Driver Execution Mode' with two radio buttons: 'Use driver in multiprocess mode.' (selected) and 'Use driver in multithreaded mode.'. At the bottom, there are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

- Specify the configured ODBC Data Source Name from the drop list.
- Enter the User Name and Password as assigned in ODBC LINK

- Select **Next**.

### **The Database Driver Certification Message**

The Driver Certification Status for InQuira Analytics Database screen appears.

- Select **Close**.

### **Specifying User Information for the Metadata Repository**

The User Authentication screen displays.

- Enter the MicroStrategy administrator name.

The InQuira Analytics recommended default is **Administrator**, with no password.

- Select **Next**.

### **Specifying the Server Definition**

The create, link, or delete a server definition screen displays.

- Select the **Create a New Server Definition**.

- Enter a Server Definition Name

OR

- Select the **Use Selected Server Definition**.

- Select a server from the Existing Server Definition.

- Select **Next**.

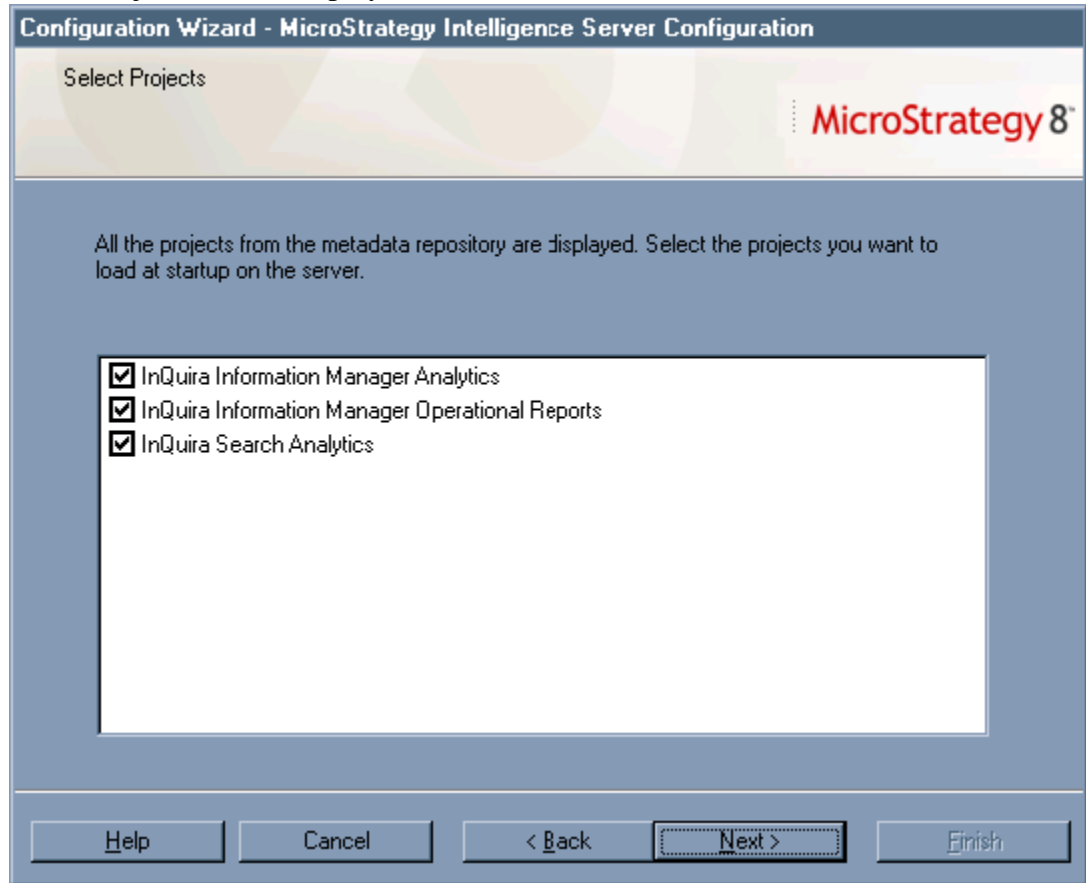
### **Specifying the Port Number**

The Port Number screen displays.

- Enter a port number to be used by MicroStrategy Intelligence Server.
- Select **Next**.

## Registering the InQira Analytics Project

The Select Projects screen displays.



- Select all three analytics projects.
- Select **Next**.

## Completing the Server Definition Process

The summary screen displays information about the server configuration.

- Select **Finish**.
- Select **Exit**.

You have now completed the MicroStrategy Configuration Process. In order to see the changes the Intelligence Server must restart.

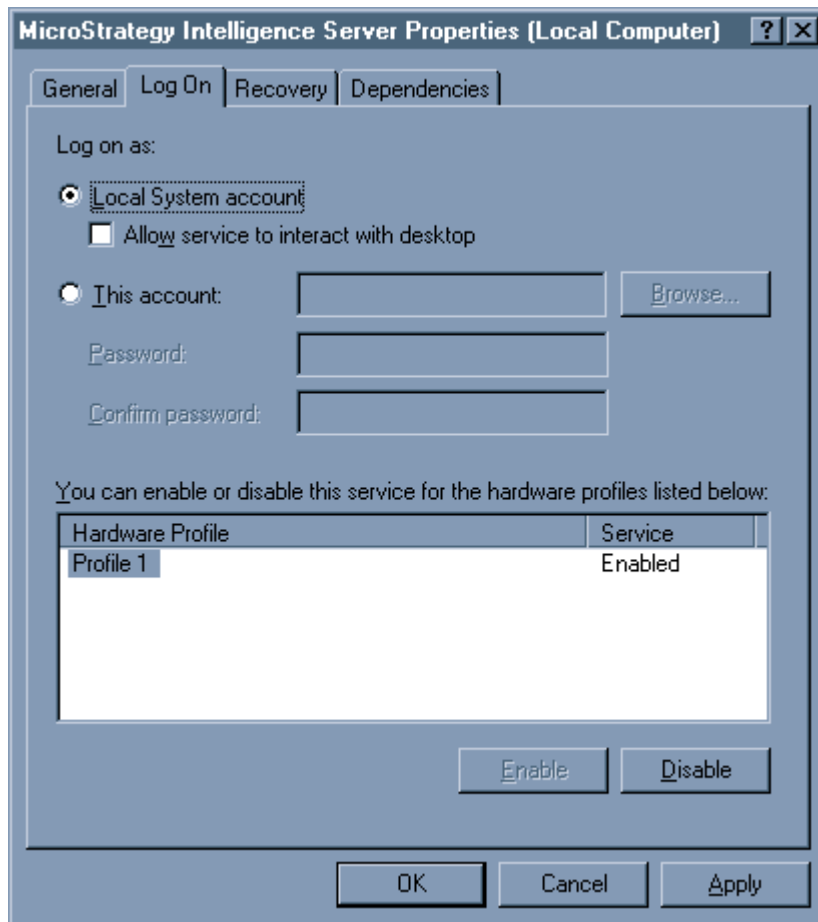
## Restarting the MicroStrategy Intelligence Server

In order for the configuration changes to take effect you must restart the MicroStrategy Intelligence Server.

You may choose to do this automatically or through Administrative Tools>Services.

If the MicroStrategy Intelligence Server returns an error and is unable to restart:

- In Administrative Tools>Services double click on MicroStrategy Intelligence Server.
- Select the Log on Tab.



- Select to log on as **Local System account**.
- Select **OK**.
- Start the Service.

## Chapter 6      Configuring Report Generation

After you have finished installing InQuira Analytics and configuring MicroStrategy you may access InQuira Analytics reports:

From the sever's Start menu:

Start->Programs->Microstrategy->Web

or direct a browser to:

`http://<servername>/Microstrategy/asp`

- Select the **Go to the Administrator Page** link
- Enter the name of server and select **Add**
- Select **Save** in the page that displays
- Select **Connect** next to the server name
- Select **Return to Microstrategy Home**
- Select **InQuira Analytics**
- Login as Administrator (the default password is blank)

You should see three folder names. Select one of the folders, then select a report. The report should run with no errors (the no data message is acceptable).

For more information on configuring and using InQuira Analytics see InQuira Analytics Configuration and User's Guide.

