InQuira Analytics Installation Guide

Installing and Configuring InQuira Analytics Applications

InQuira Version 8.2.3

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InQuira, Inc.

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Patents 7,668,850, 7,672,951, 7,747,601. Other patents pending.

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Preface About This Guide

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

This preface includes information on:

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

In This Guide

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

Chapter 1, InQuira Analytics Overview	This chapter describes the general installation process, lists hardware and software requirements and dependencies, and provides product packaging and distribution information.
Chapter 2, Installing InQuira Analytics	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.
Chapter 3, Creating the ODBC DSN	This chapter describes how to configure the ODBC DSNs used in InQuira Analytics.
Chapter 4, Creating the InQuira Analytics Metadata Database	This chapter describes how to create the metadata schema.
Chapter 5, Installing and Configuring the InQuira Analytics Report Server	This chapter describes using the packaged installation program to install and configure the MicroStrategy software that supports InQuira Analytics report creation and presentation.
Chapter 6, Configuring Report Generation	This chapter describes how configure InQuira Analytics to generate reports.

Contacting InQuira

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

Address:	InQuira, Inc. 900 Cherry Ave., 6th Floor San Bruno, CA 94066
Telephone:	(650) 246-5000
Fax:	(650) 264-5036
Email:	For sales information, send email to sales@inquira.com. For product support, send email to support@inquira.com.
World Wide Web:	Learn more about InQuira products, solutions, services, and support on the world wide web at: **www.inquira.com**.

InQuira Product Documentation

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/

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.

Detailed information about each product document set is available in:

- *Intelligent Search Documentation* on page 3
- *InQuira Analytics Documentation* on page 4
- *Information Manager Documentation* on page 5
- *iConnect Integration Documentation* on page 5

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

Intelligent Search is distributed with the following documentation.

Document	Number	Description
Intelligent Search Installation Guide	IS82-IG-00	This guide is intended for technical staff who are responsible for installing InQuira. It provides detailed information on installing InQuira and configuring the application on a single processor using the Installation Configuration Environment facility.
Intelligent Search Administration Guide	IS82-CA-00	This guide is intended for system and application administrators who need to configure an InQuira application in an enterprise environment. It describes InQuira integration, development, configuration, and maintenance processes and tasks.

Document (Continued)	Number	Description (Continued)
Intelligent Search Language Administration Guide	IS82-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 application using the System Manager. This book provides usage information about the System Manager, conceptual information about the InQuira language objects, and task information about the process of managing the user experience provided by the InQuira application.
Intelligent Search Language Tuning Guide	IS82-LD-00	This guide is intended for application developers who need to create and maintain advanced InQuira language-processing elements using the Dictionary and other InQuira Language Workbench applications.
Intelligent Search Optimization Guide	IS82-AG-00	This guide is intended for application developers who need to implement InQuira advanced features, including Personalized Navigation and Process Wizards.
Intelligent Search Application Development Guide	IS82-API-00	This guide provides information about integrating and customizing the InQuira Personalized Response User Interface.
Intelligent Search Language Reference	IS82-LRG-00	This guide is for language developers implementing InQuira 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 InQuira Match Language and Variable Instantiation Language.
Intelligent Search User Interface Guide	IS82-UI-00	This guide is intended for application developers who need to customize the InQuira 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.

InQuira Analytics Documentation

InQuira Analytics is distributed with the following documentation.

Document	Number	Description
InQuira Analytics Installation Guide	IA82-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Analytics. It provides detailed information on installing and configuring the InQuira Analytics product for use with an InQuira application.
Analytics User Guide	IA82-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 InQuira application performance.

Information Manager Documentation

InQuira Information Manager is distributed with the following documentation.

Document	Number	Description
Information Manager Installation Guide	IM82-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.
Information Manager Administration Guide	IM82-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 application. It also contains information for general business users who need to use the Information Manager to create and manage content.
Information Manager Content Authoring Guide	IM82-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.
Information Manager Developer's Guide	IM82-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.

iConnect Integration Documentation

The InQuira 8.2 iConnect products are distributed with the following documentation.

Document	Number	Description
iConnect Developers Guide	CA81-ID-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira iConnect with an InQuira application and a supported CRM application.
iConnect for Siebel Contact Center Integration Guide	CA81-IS-00	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira iConnect with an InQuira application and a supported Siebel application.
iConnect for Oracle CRM On Demand Integration Guide	CRMOD82-SG-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira iConnect with an InQuira application and a supported Oracle CRM On Demand application.
Self-Service Portal Integration Guide	CRMOD82-SS-01	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira iConnect with an InQuira application and a supported Oracle CRM On Demand self-service portal.

Document	Number	Description (Continued)
Self-Service Portal User Administration Guide	CRMOD82-SS-02	This guide is intended for systems administrators who need to plan for and administer the InQuira iConnect with an InQuira application and a supported Oracle CRM On Demand self-service portal.
Self-Service Portal User Guide	CRMOD82-SS-03	This guide is intended for systems administrators who need to plan for and administer the InQuira iConnect with an InQuira application and a supported Oracle CRM On Demand self-service portal.

Screen and Text Representations

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

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.

Chapter 1 InQuira Analytics Overview

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

You can use Intelligent Search Analytics to:

- Report on application performance, such as system response time
- Assess the quality of InQuira 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 InQuira Analytics Application* on page 8
- *InQuira Analytics Architecture* on page 8
- *The InQuira Analytics Reporting Process* on page 8
- *InQuira Analytics Server and Processor Deployment* on page 8
- *InQuira Analytics Requirements and Dependencies* on page 9

The InQuira Analytics Application

The InQuira Analytics application comprises the InQuira data warehouse, an ETL server, and a Report server, as described in *InQuira Analytics Architecture* on page 8. The requirements and dependencies of the servers and application components are described in *InQuira Analytics Requirements and Dependencies* on page 9.

InQuira Analytics Architecture

An InQuira 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 InQuira Analytics components include:

- The ETL server, which uses a configured InQuira 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 InQuira Analytics Report server, which hosts the report generation and presentation functions

The InQuira Analytics Reporting Process

The ETL process loads data from InQuira 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 InQuira Analytics user interface.

InQuira Analytics Server and Processor Deployment

If your InQuira application processes fewer than 3,000 questions per day, you can deploy InQuira 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.

InQuira Analytics Requirements and Dependencies

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

- *Data Warehouse Server Requirements* on page 9
- *ETL Server Requirements* on page 10
- *Report Server Requirements* on page 10
- *Report Client Requirements* on page 11

NOTE: The InQuira Analytics environment requires an installed and configured InQuira application. See the InQuira documentation as described in *InQuira Product Documentation* on page 3 for information on installing, configuring and deploying an InQuira application.

NOTE: See *InQuira Platform and Language Requirements* for complete information on supported platforms and databases. The document is available at: `https://documentation.inquira.com`.

Data Warehouse Server Requirements

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

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

NOTE: You can use the same database that you allocate for the InQuira Content Store as described in the section on *Databases* in the *Intelligent Search Installation Guide*.

Data Warehouse Server Hardware Requirements

The InQuira 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

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.

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

Report Server Requirements

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.

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

Windows Server 2003 Platform Requirements

- Windows Server 2003 Enterprise Edition
- Internet Explorer 7.x or 8.x

NOTE: MicroStrategy 8.1.1 requires Microsoft Internet Explorer 8 to be run with the compatibility mode in place.

NOTE: See *InQuira Platform and Language Requirements* for complete information on supported platforms and databases. The document is available at: `https://documentation.inquira.com`.

Report Client Requirements

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.

Requirement	Minimum Required	Recommended
Processor	450 MHz	1 GHz or higher
RAM	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 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 installed directory structure. The InQuira installation program installs and configures the Intelligent Search Analytics and Information Manager Analytics products.

IMPORTANT: If you encounter problems installing Analytics, see *Chapter 9, Troubleshooting Analytics* in the *Analytics Administration Guide* Guide.

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 product components separately from the configured product unless specifically instructed by InQuira technical staff.

Pre-Installation Checklist

ETL Data Loading

Data Archiving

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

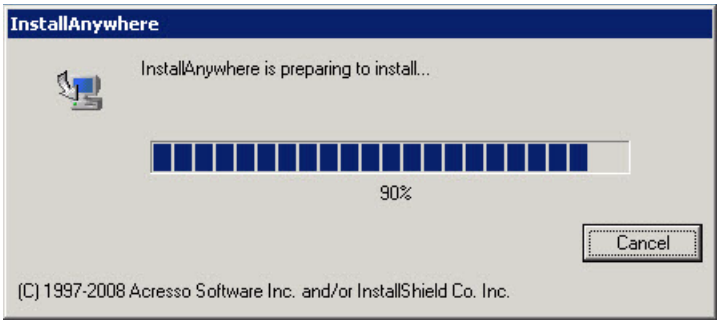
   To start the installation program in Microsoft Windows environments:

   Execute `install_analytics.exe`

   To start the installation program in Linux environments:

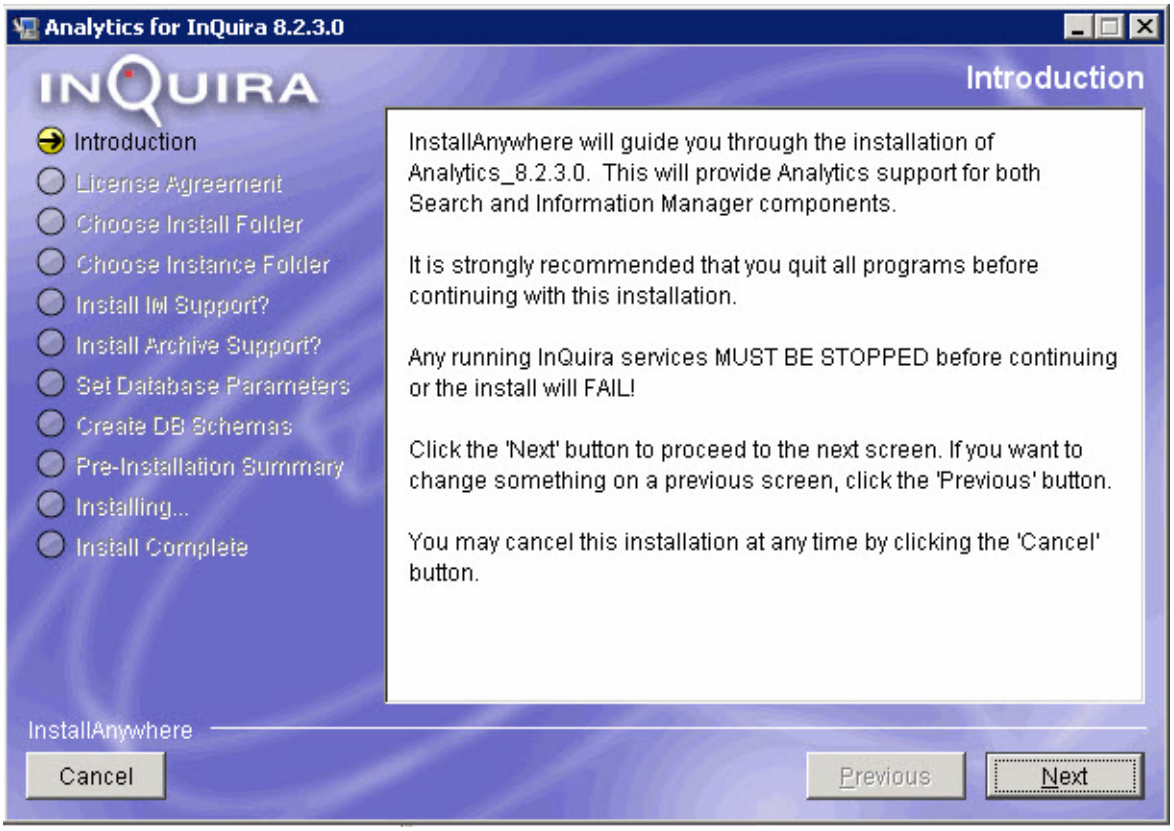
   Execute `install_analytics.bin`

   The installation program starts:



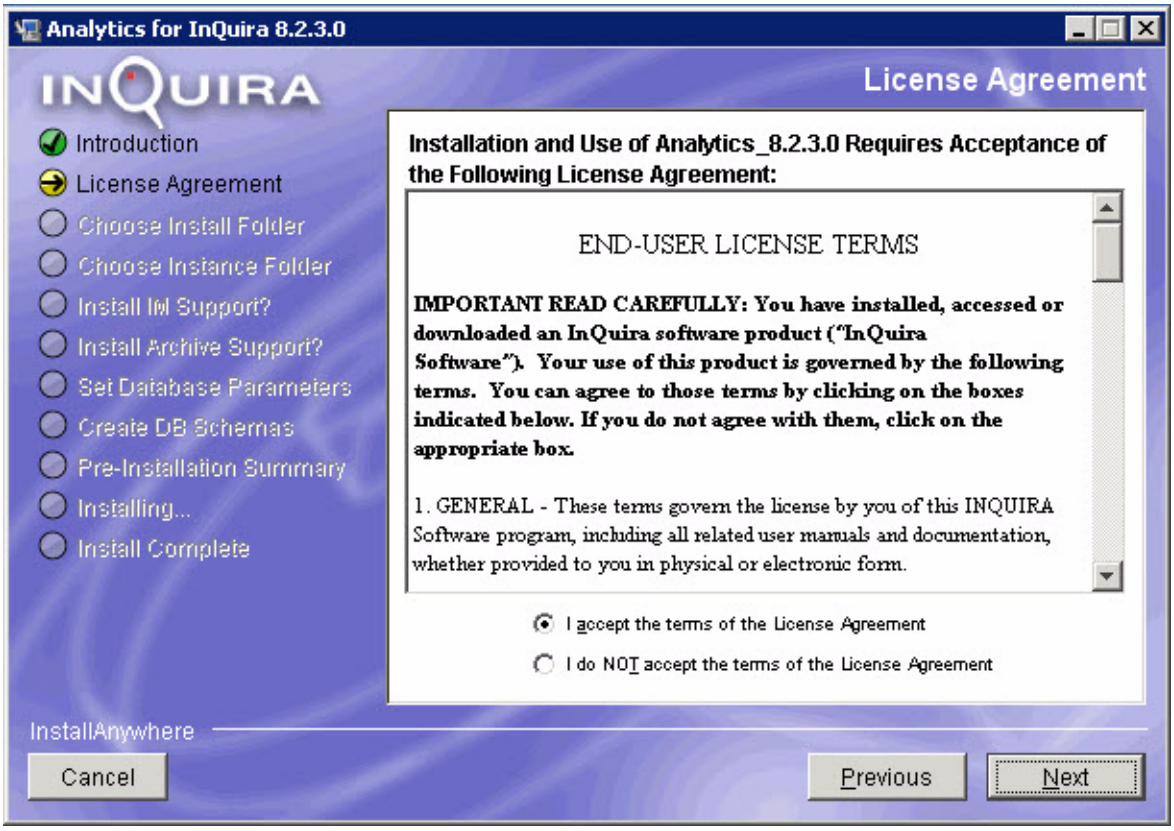
NOTE: Application screen shots used in this guide may reflect a different release number than the one being installed. Application screen content is compared for overall accuracy with screen shots in the guide prior to release. Updates are made where necessary.

2. The Introduction screen displays.



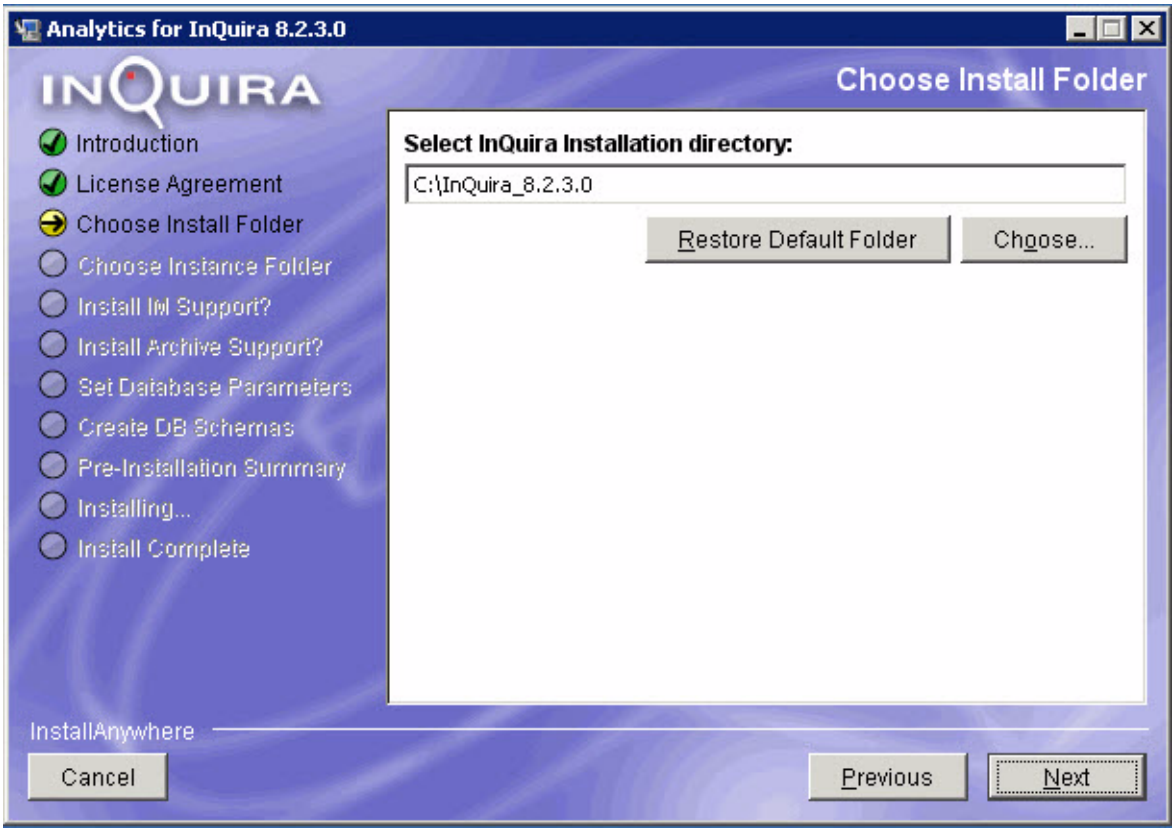
- It is strongly recommended that you quit all programs before continuing with the installation.
- Select **Next**.

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 InQuira installation into which you want to install InQuira Analytics. The installation program selects a default location:

  `C:\Inquira_[release]` in Windows environments or `<user_home>/InQuira_[release]` in Linux environments

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

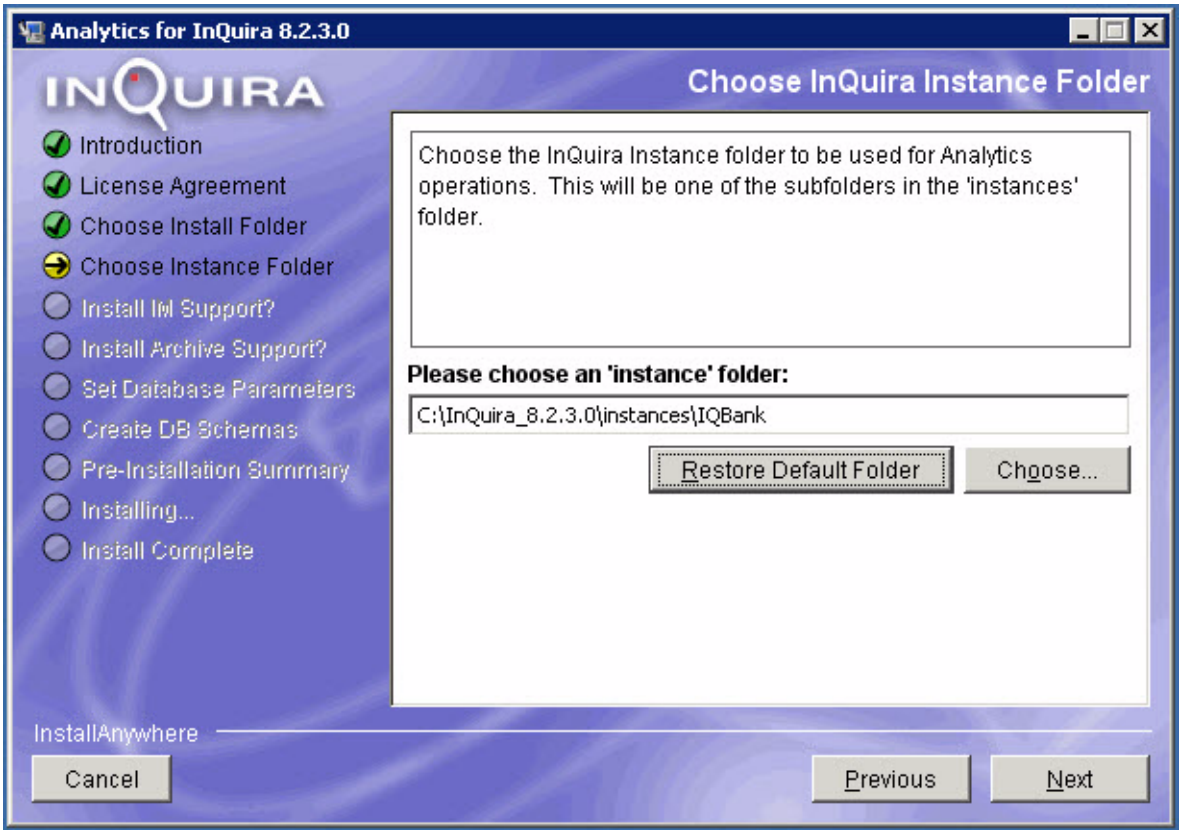
  Use the **Restore Default Folder** button to reset the default installation directory, if necessary.

- Select **Next**.

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

Choosing the InQuira Instance Folder

5. The Choose InQuira Instance Folder screen displays.



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

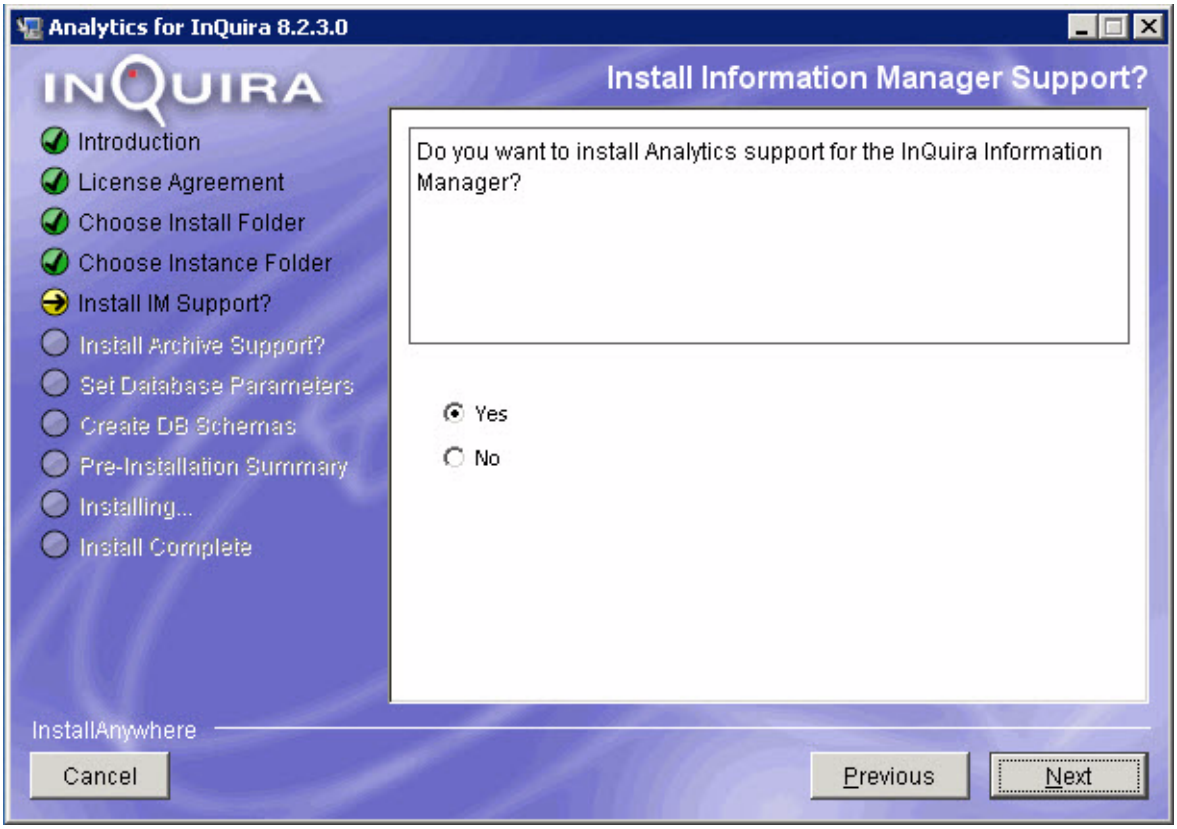
  `C:\Inquira_[release]\instances\` in Windows environments or `<user_home>/InQuira_[release]\instances` in Linux environments.

  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.

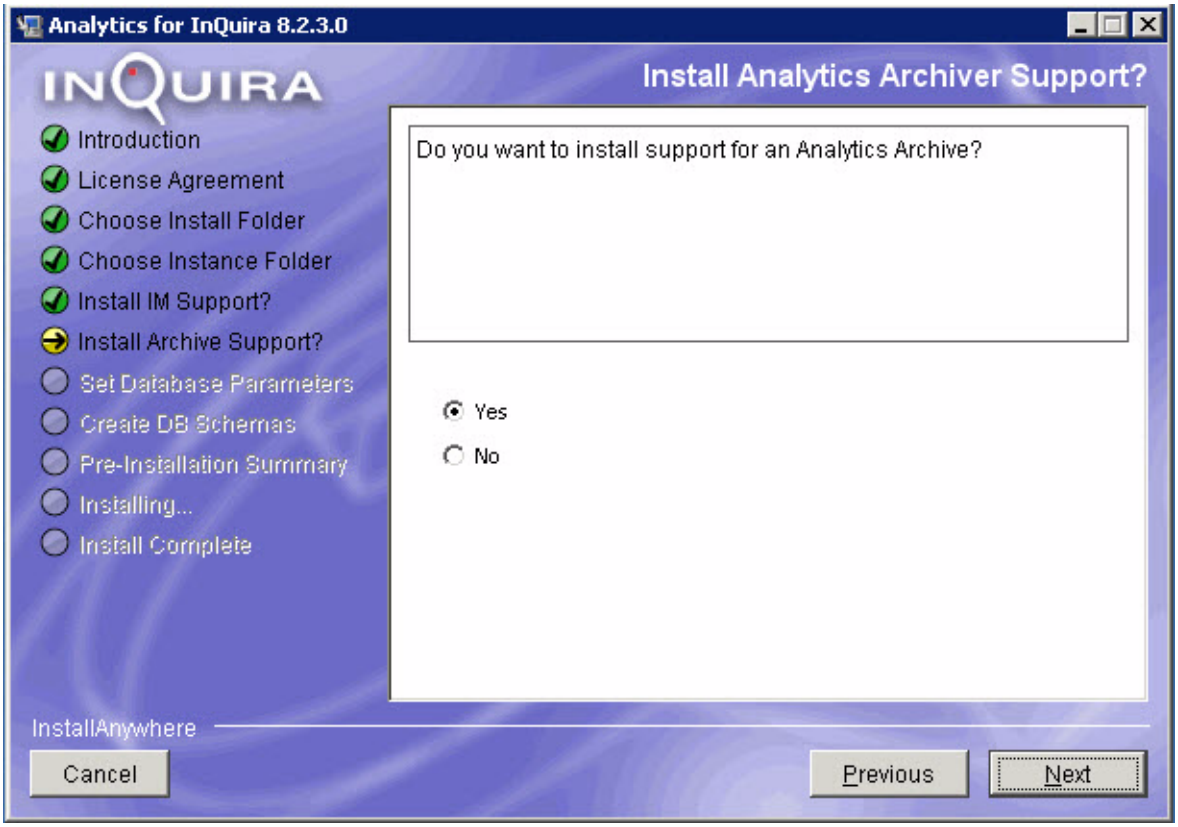


- Select **Yes** or **No**.

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

- Select **Next**.

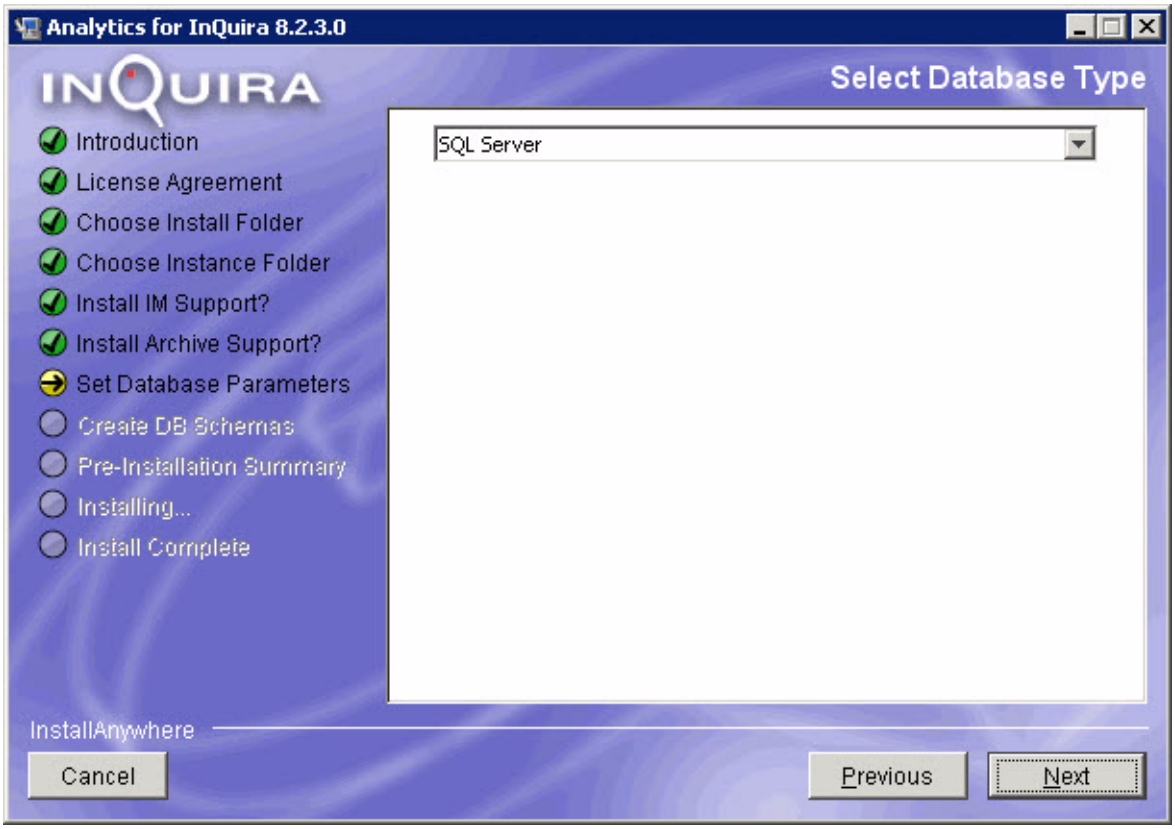
7. The Install Analytics Archiver Support screen displays.



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

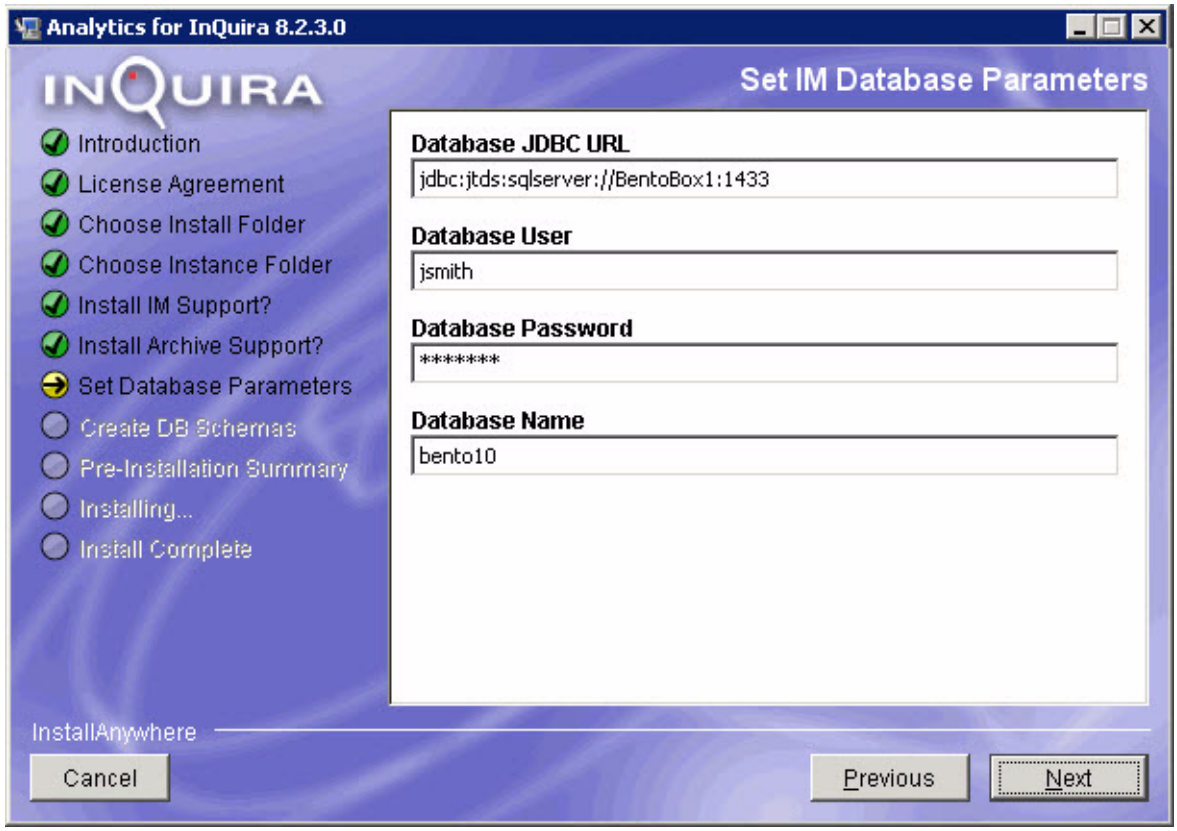
  Selecting **Yes** will install an Analytics Archive.
- Select **Next**.

8. The Set Database Parameters - Select Database Type screen displays.



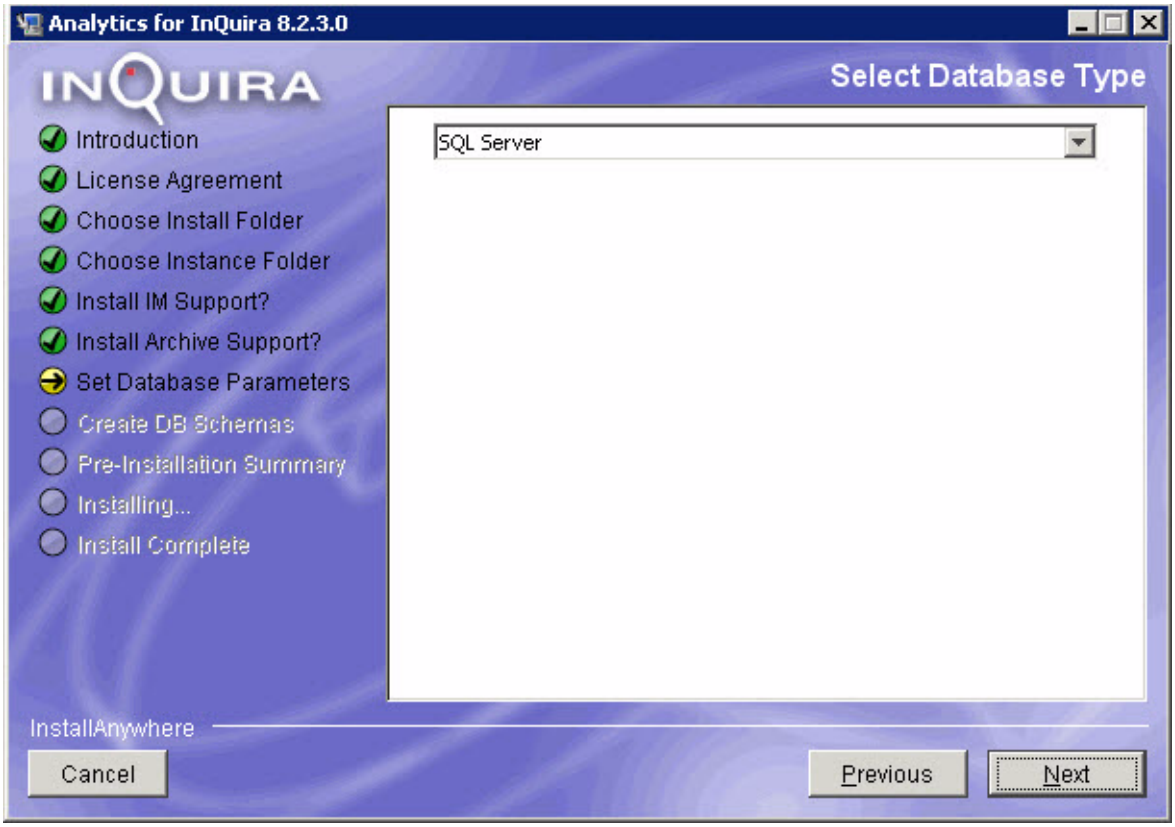
- Set the database parameters for the Information Manager database.
- Select **Next**.

  If you selected **Yes** on the Install Information Manager Support screen, the *Set IM Database Parameters* screen displays.



- Set the database parameters for the Information Manager database.
  - **Database JDBC URL** - The URL for the Information Manager database.
  - **Database User** - Database username login .
  - **Database Password** - Password associated with the username login above.
  - **Database Name** - Name of the database.
- Select Next.

9. The Set Database Parameters - Select Database Type screen displays.

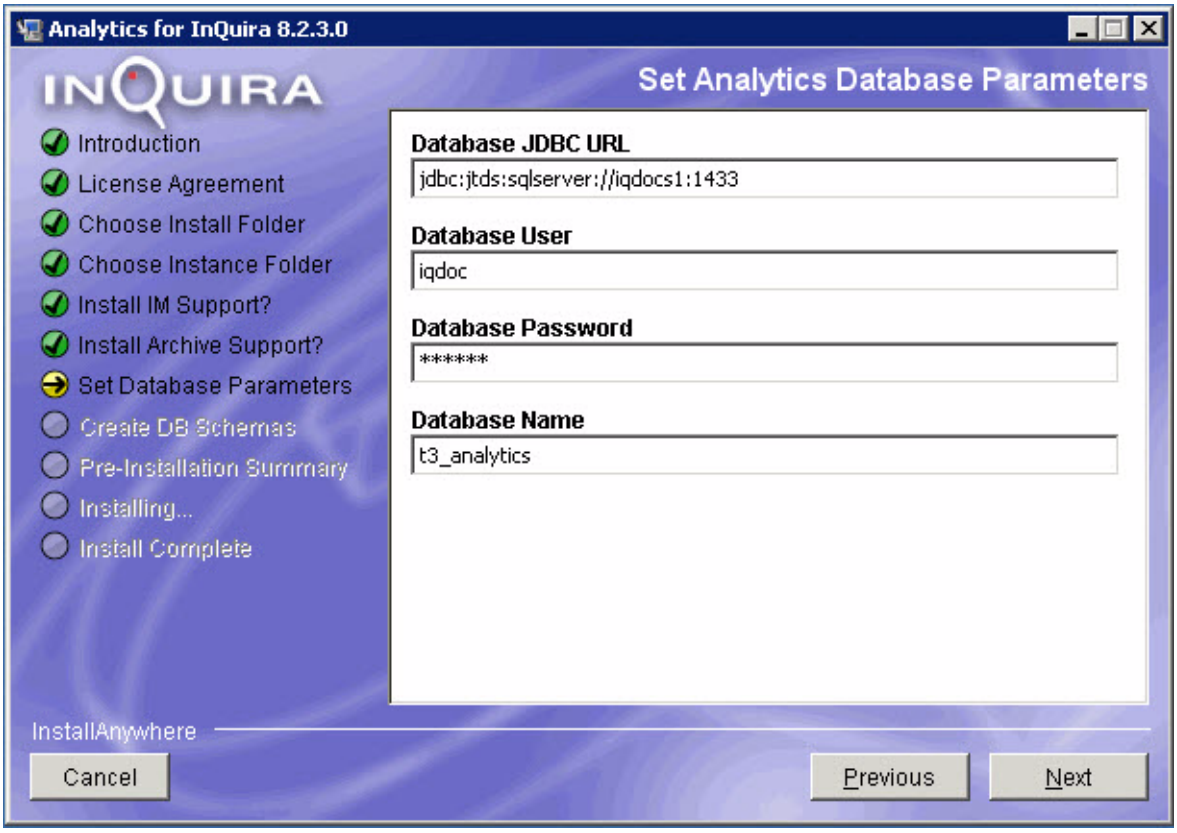


- Set the database parameters for the Analytics Database.

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

- Select **Next**.

10.The Set Analytics Database Parameters screen displays.



- Set the database parameters for the Analytics Database.
  - **Database JDBC URL** - The URL for the database analytics uses.
  - **Database User** - Database username login .
  - **Database Password** - Password associated with the username login above.
  - **Database Name** - Name of the database.

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

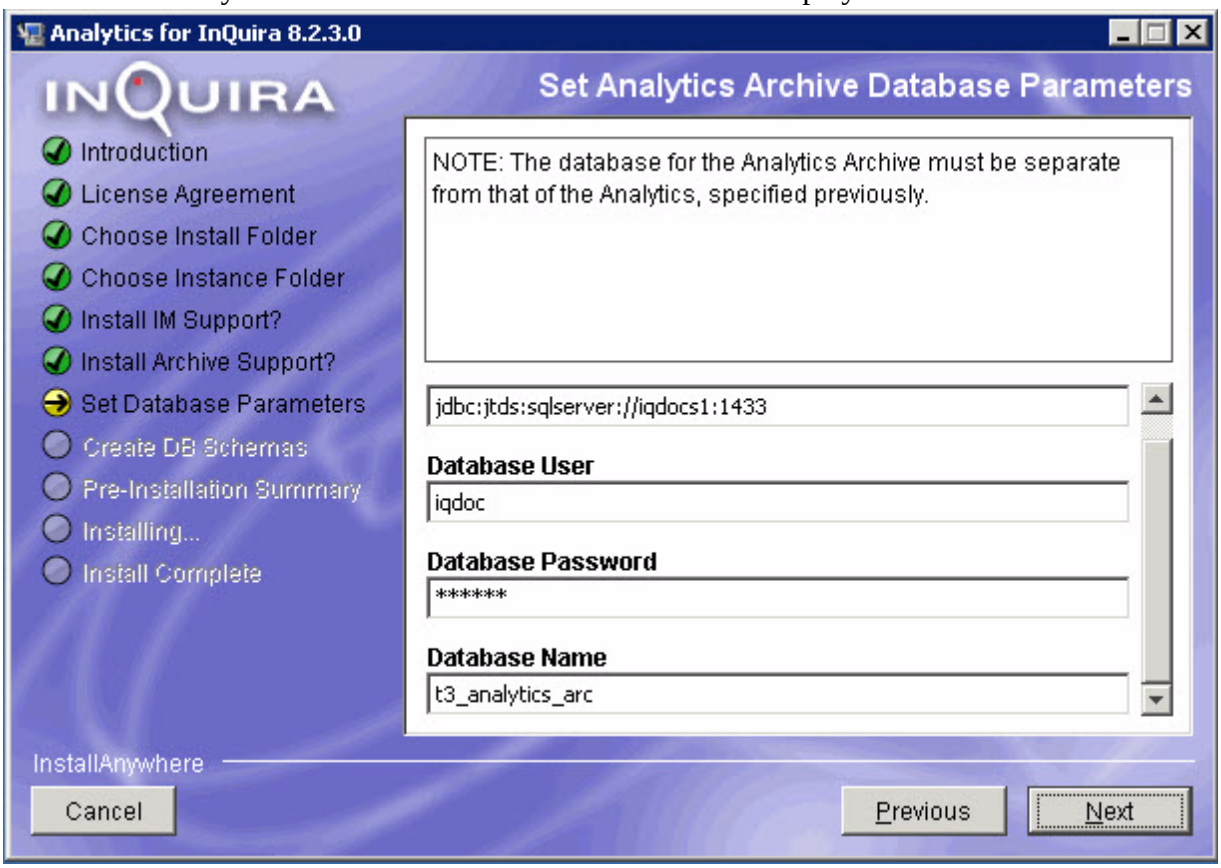
- Select Next.

  If you selected **Yes** on the Install Analytics Archive Support screen, the ***Set Analytics Archive Database Parameters*** screen displays. See *Setting InQuira Analytics Archive Database Parameters* on page 27 .

  If you selected **No** on the Install Analytics Archive Support screen the ***Create Analytics Database?*** screen displays. See *Creating InQuira Analytics Databases* on page 28.

Setting InQuira Analytics Archive Database Parameters

The Set Analytics Archive Database Parameters screen displays.



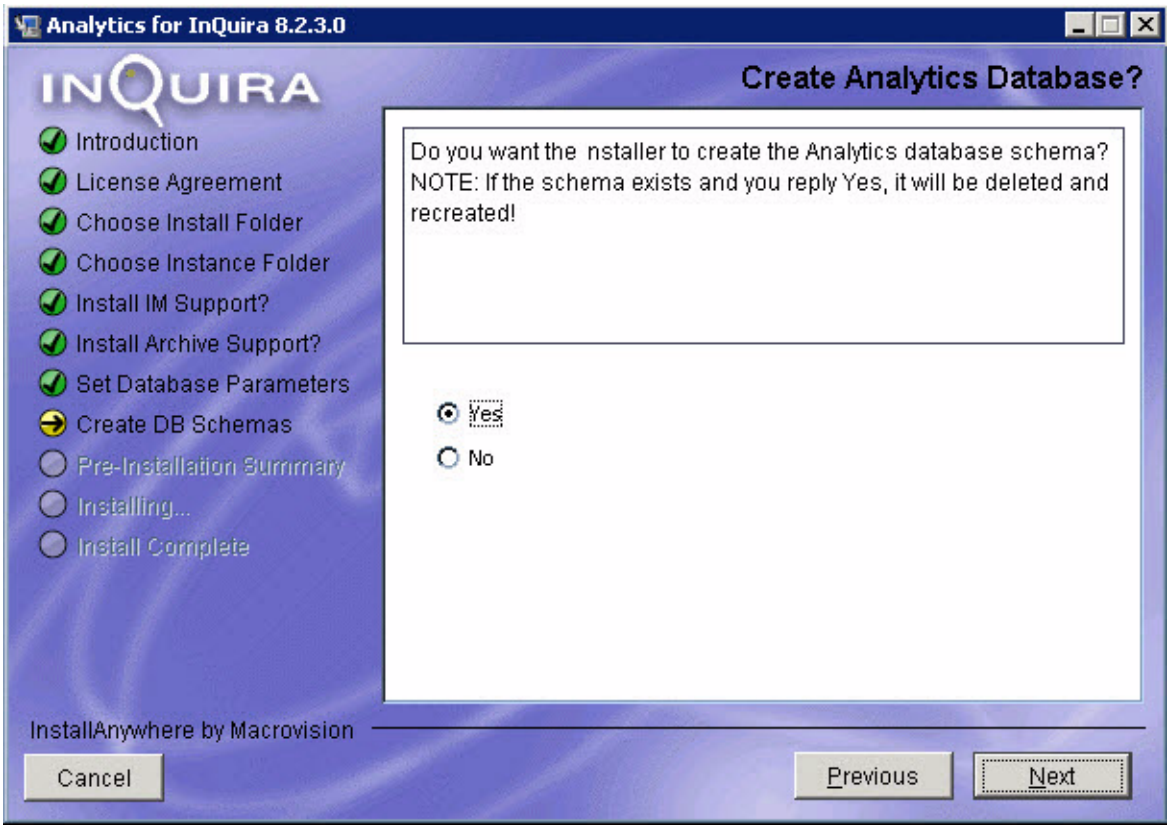
- Set the database parameters for the Analytics Archive Database.

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 28).

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.

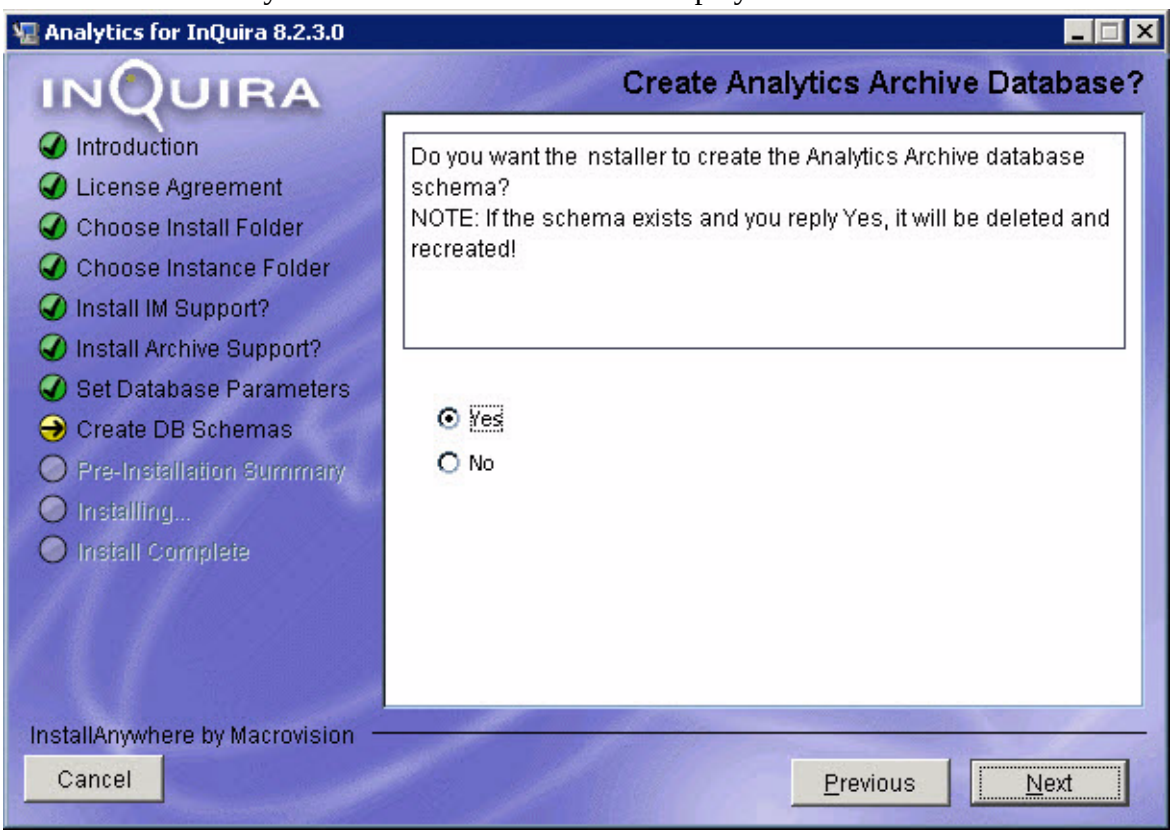
- Select **Next**.

If you selected Yes on the Install Analytics Archive Support screen the ***Create Analytics Archive Database*** see *Create InQuira Analytics Archive Database* on page 29 screen displays.

If you selected No on the Install Analytics Archive Support screen the ***Pre-Installation Summary*** see *The Pre-Installation Summary* on page 30 screen displays.

Create InQuira Analytics Archive Database

The Create Analytics Archive Database screen displays.



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

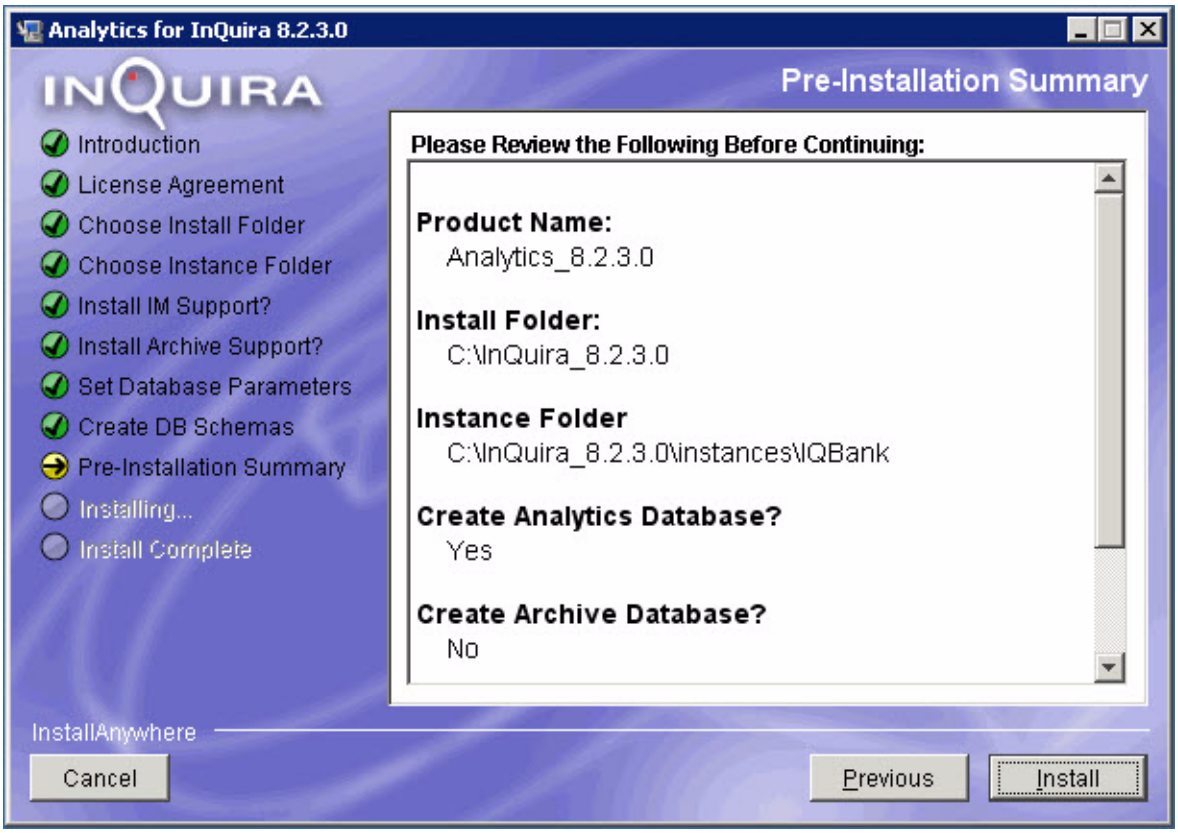
  If you select **Yes**, and a schema already exists it will be deleted and recreated.

- Select **Next**.

The ***Pre-Installation Summary*** see *The Pre-Installation Summary* on page 30 screen displays.

The Pre-Installation Summary

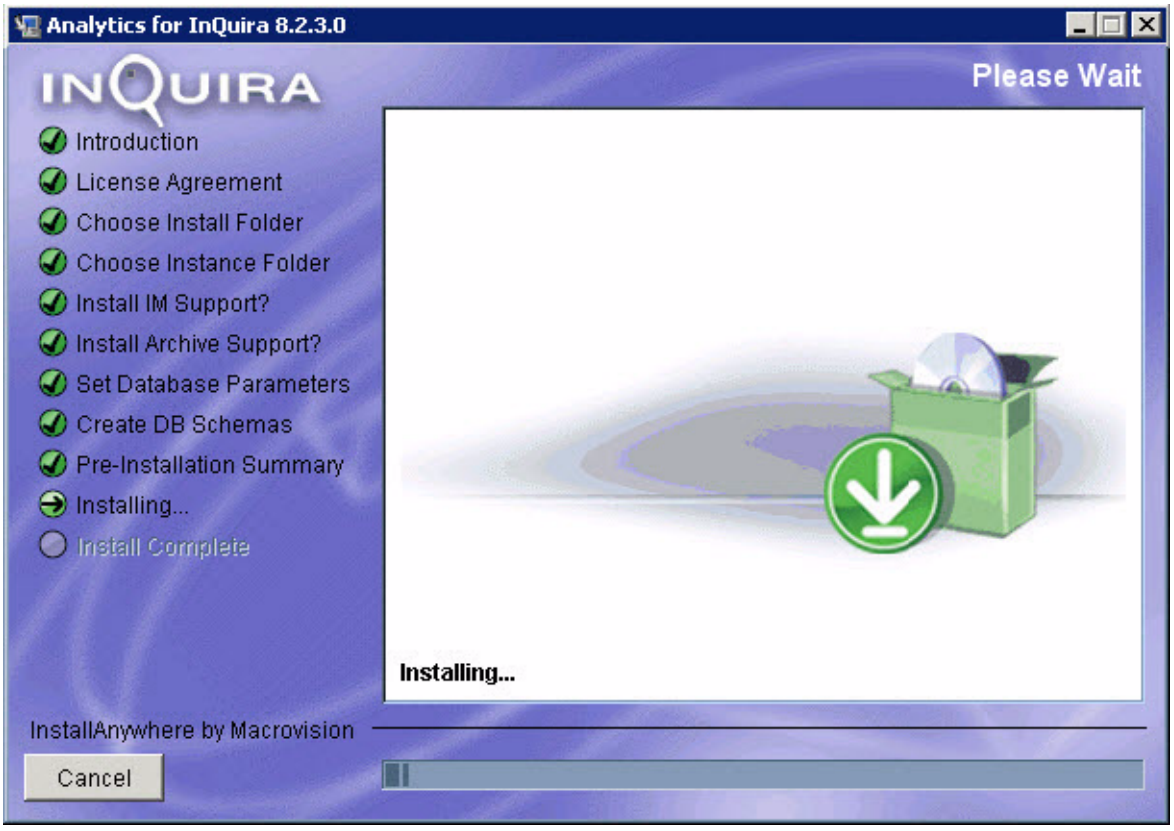
1. The pre-installation summary screen displays.



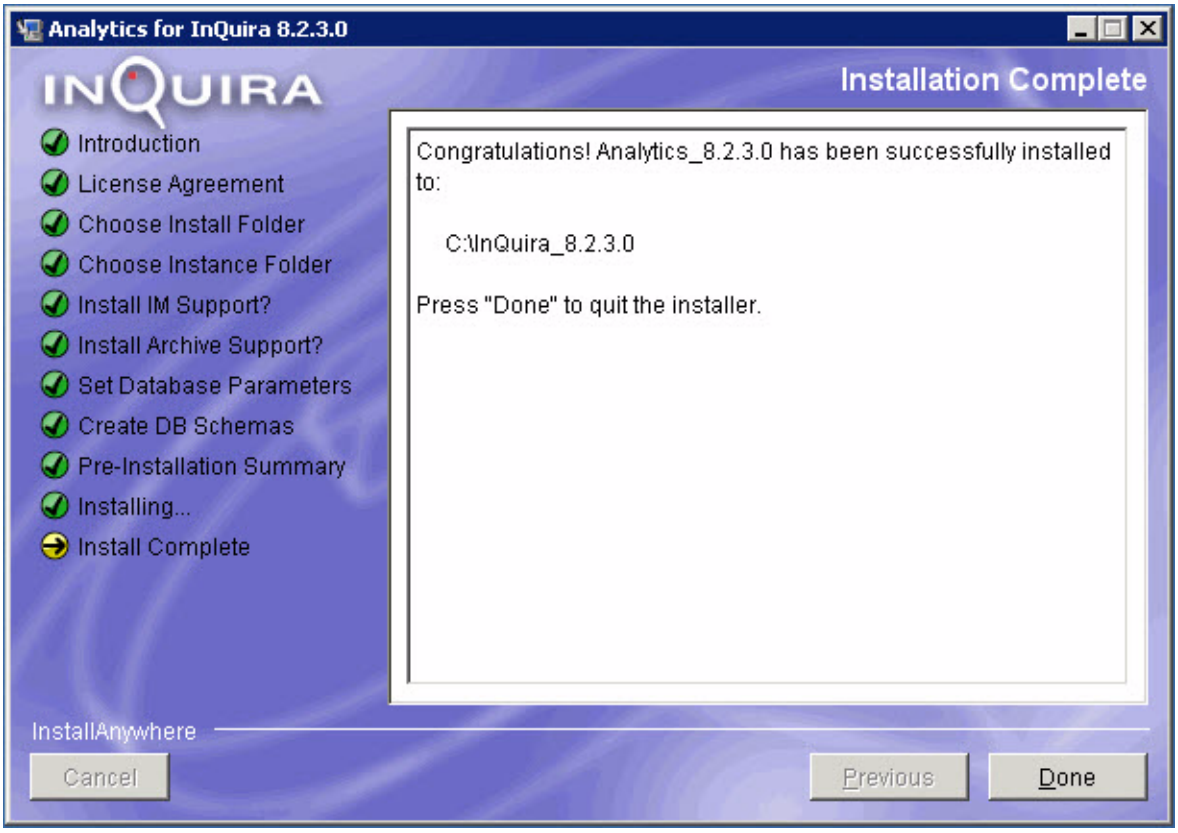
- Review your selections.
- Use the **Previous** button to make any corrections.
- Select **Install** to continue.

The installation program begins installing InQuira 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.

After completing the installation, open an ICE window and run the following command:

```
scheduler.sh|bat run DBInterface -u analytics
```

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:

- InQuira Analytics Database
- InQuira IM OLTP Database
- InQuira Search Archive Database

Creating an ODBC DSN

To create an ODBC DSN for the necessary InQuira 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 Analytics Database
- InQuira IM OLTP Database (the Information Manager and OLTP data sources are the same)
- InQuira 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.

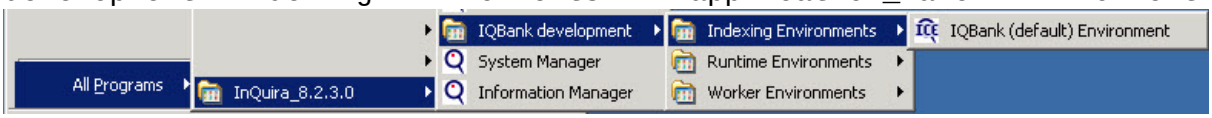
This metadata database schema is used to store information about report definitions and security.

Opening the Installation Configuration Environment

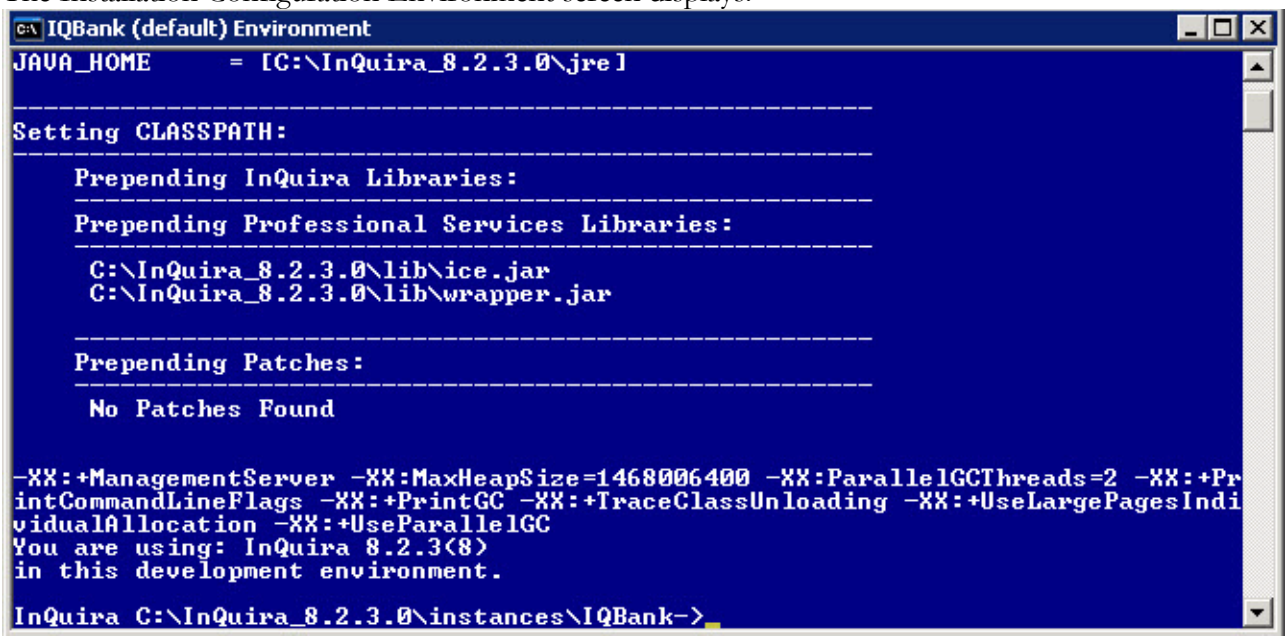
To start the Installation Configuration Environment:

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

```
Start => Programs => InQuira [release] => <application_name>
development=>Indexing Environments => <application_name> Environment
```



The Installation Configuration Environment screen displays.



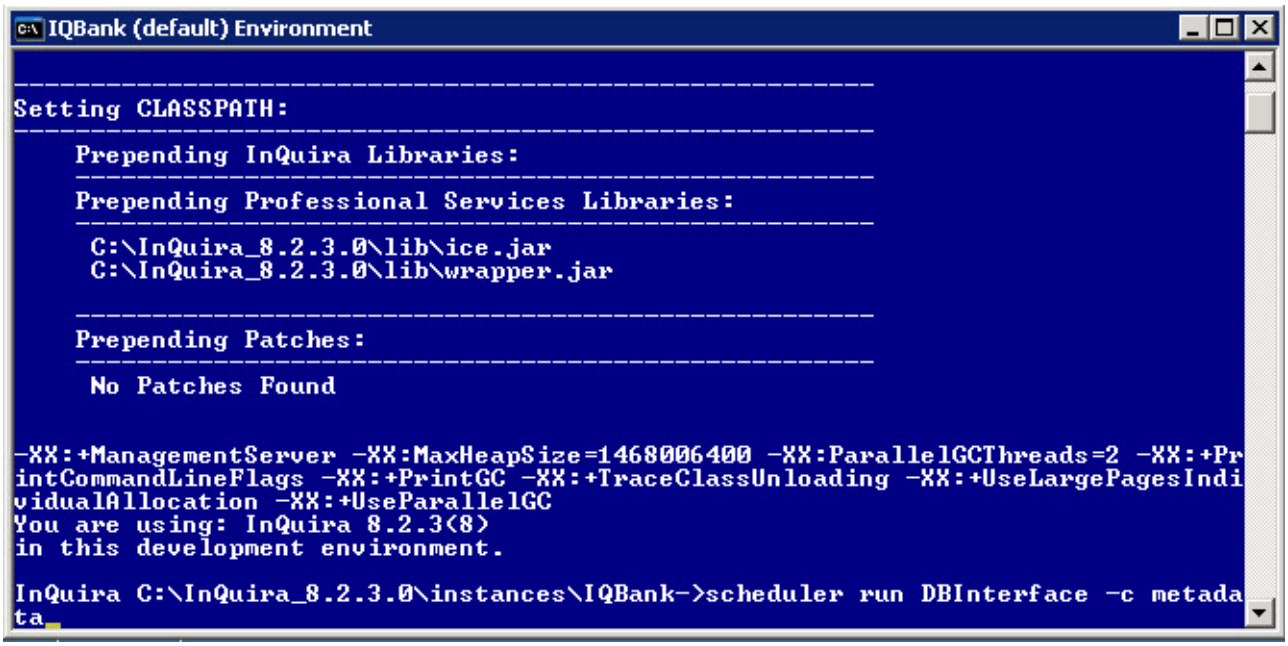
Running the Create Metadata Script

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

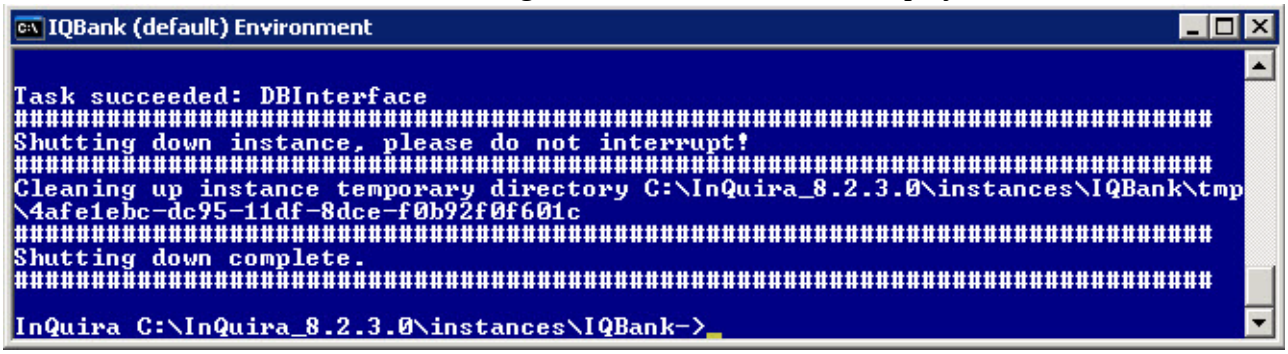
scheduler run DBInterface –c metadata

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

scheduler.sh run DBInterface –c metadata



When finished the Installation Configuration Environment will display:



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

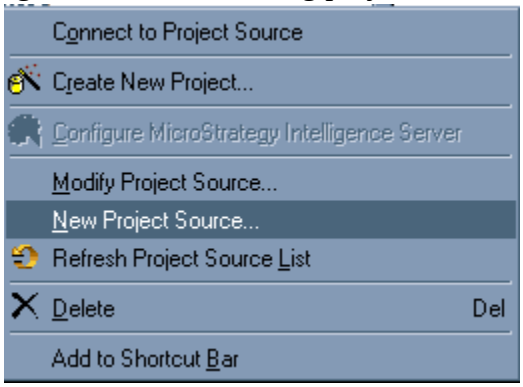
NOTE: The Configuration Wizard opens automatically upon restarting. Exit this program.

To create a new project source you:

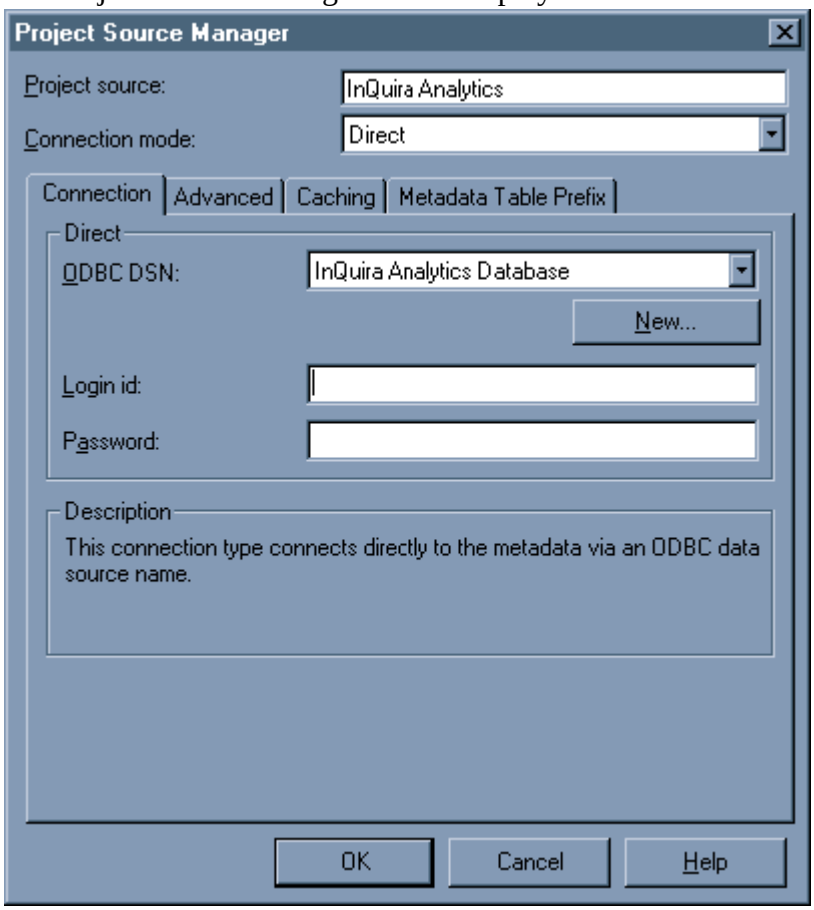
- Open the Microstrategy Desktop

  (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 InQuira Analytics Database as the ODBC DSN.
- Enter the Login id and password.
- Select **OK.**

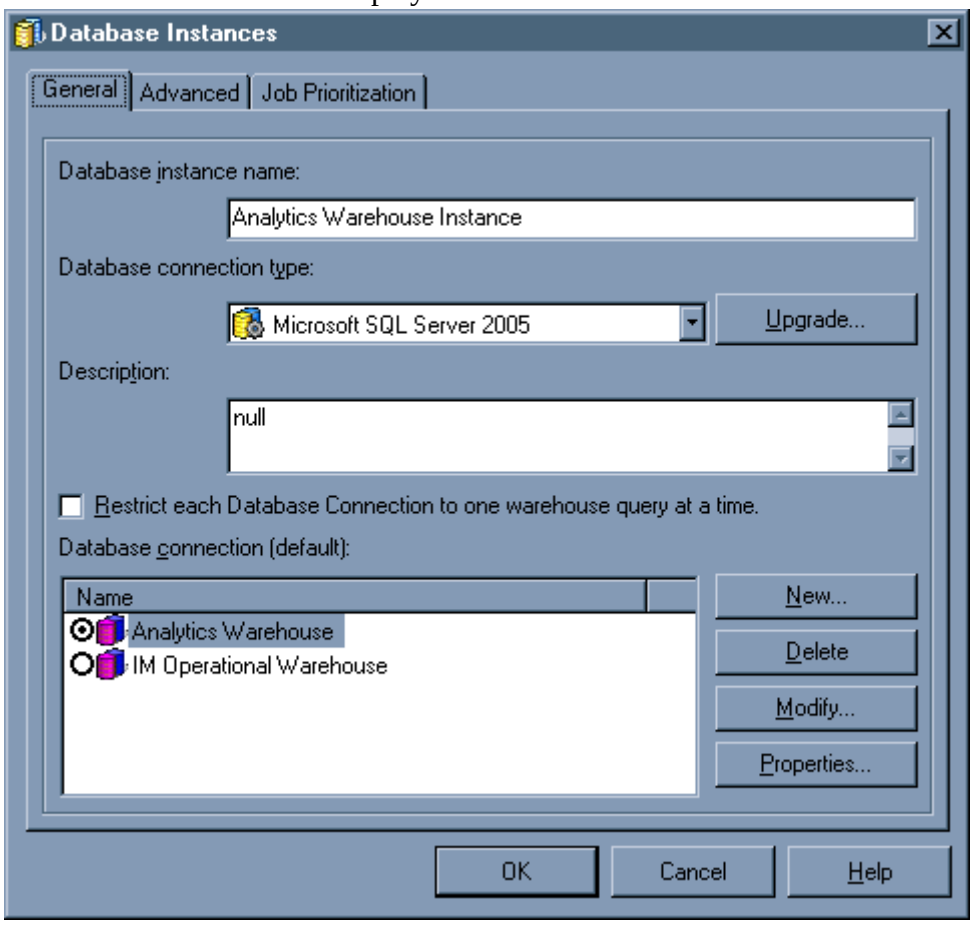
The newly created project source will appear on the Microstrategy Desktop screen.

Configuring the Analytics Warehouse Instance

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

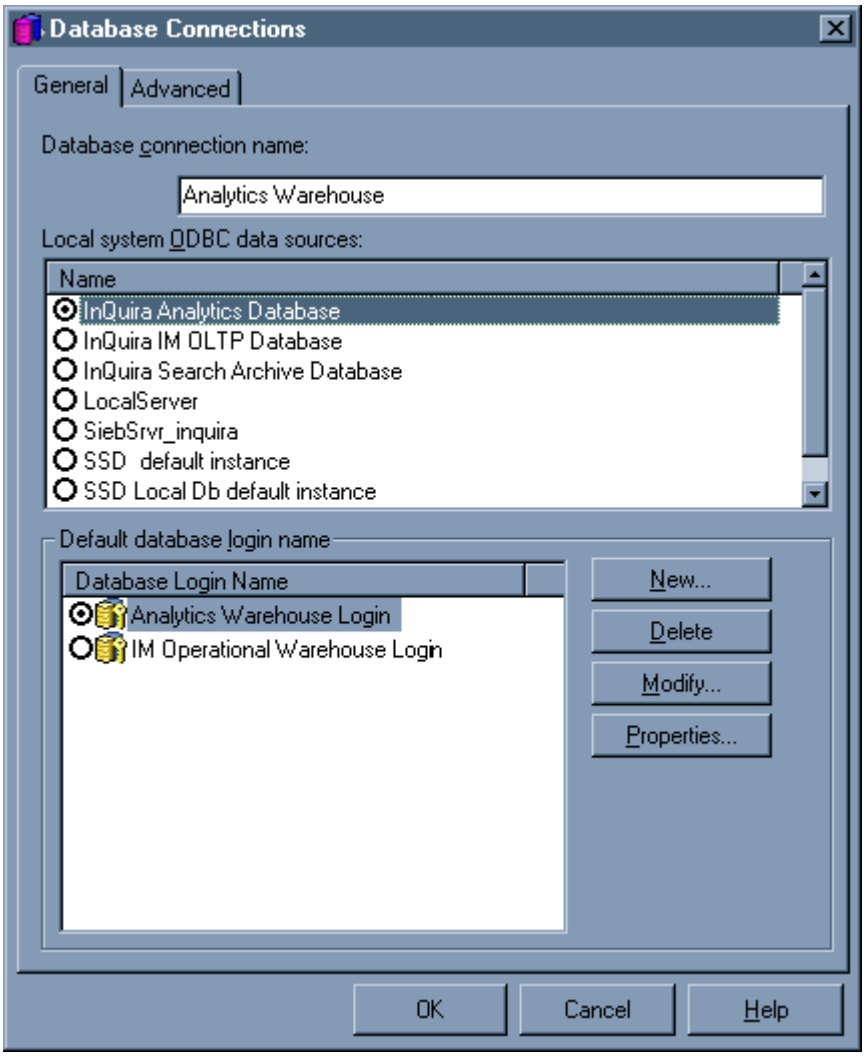
- Open the newly created Project source.
- Open Administration.
- Open the Database Instance Manager.

The Database Instance Screen displays.



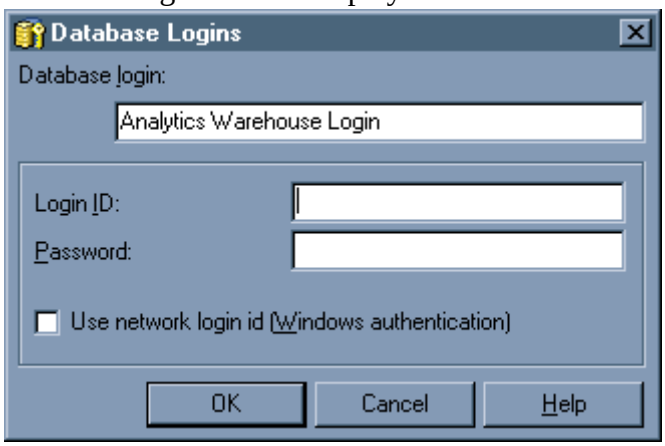
- Select Analytics Warehouse Instance.
- Select Modify

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 InQuira Analytics Database.
- Select OK.
- Select OK.
- Select OK.

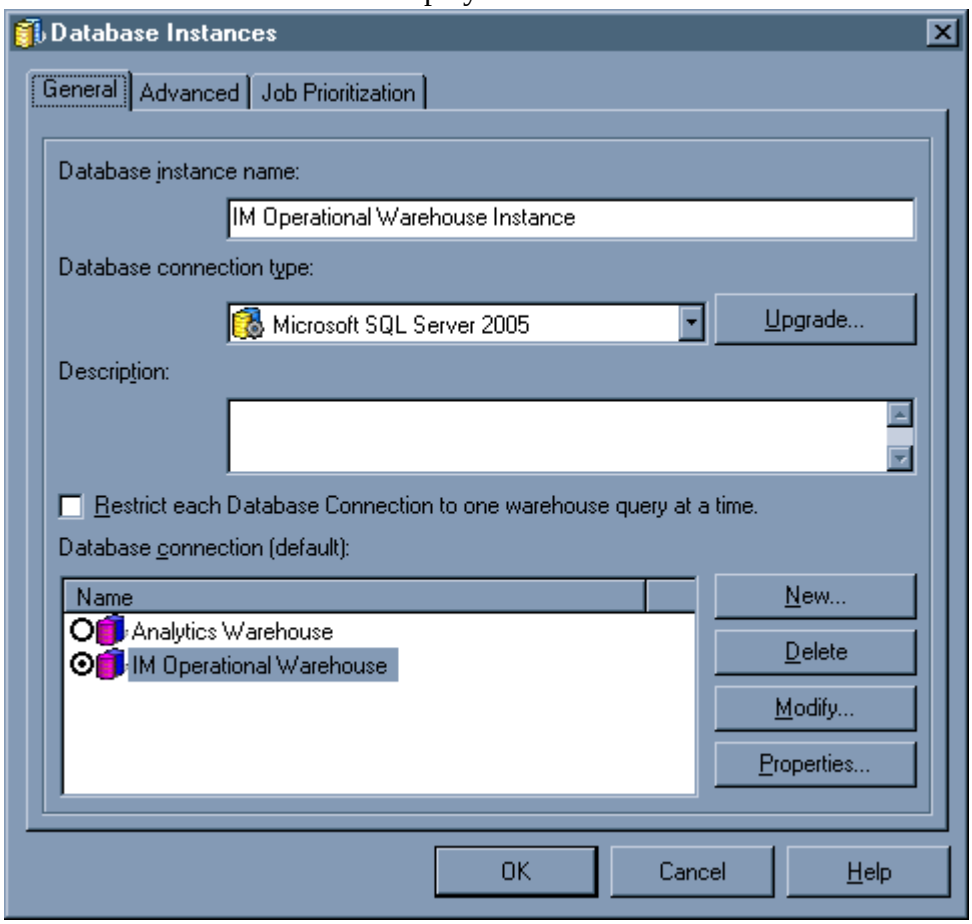
Repeat these steps to ***configure the IM Operational Warehouse***, as described in *Configuring the IM Operational Warehouse Instance* on page 49.

Configuring the IM Operational Warehouse Instance

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

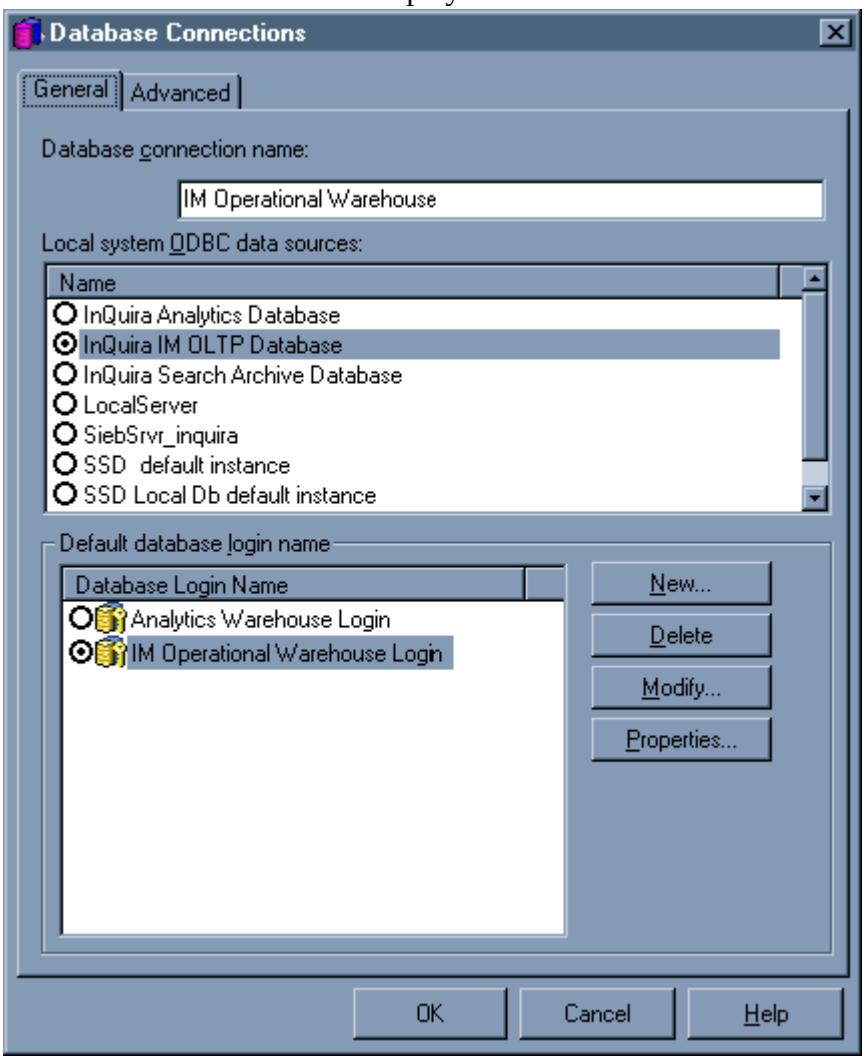
- Open the newly created Project source.
- Open Administration.
- Open the Database Instance Manager.
- Select IM Operational Warehouse Instance

The Database Instance Screen displays.



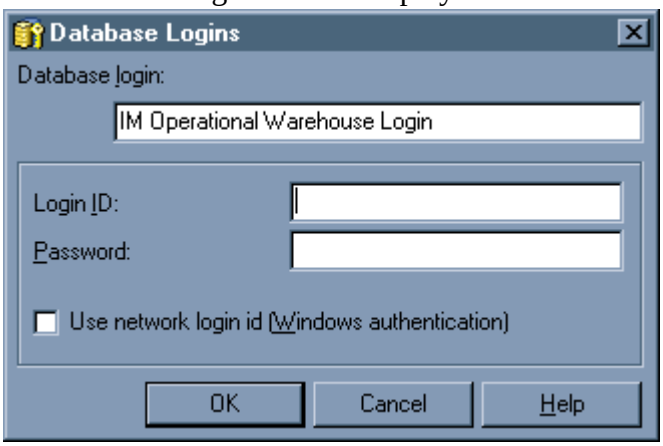
- Select IM Operational Warehouse Instance.
- Select Modify

The Database Connection screen displays.



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

The Database Logins screen displays.



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

The configuration of the new project source is now completed.

Configuring the Web-based InQuira Analytics User Interface

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

After installing the Analytics (MicroStrategy) application, you must modify the configuration by following these steps:

1. Prepare the header logo. The height of header logo should be 22px and partner should keep its original ratio. It should be transparent and its type should be GIF.
2. For .NET
    a) Copy `analytics\common\MSTR_UI\Dotnet` and `analytics\common\MSTR_UI\logo.txt` to MSTR machine.
    b.) Update the content of `analytics\common\MSTR_UI\logo.txt` with the actual logo file path.
    c.) Execute `InquiraBrand.bat` in `analytics\common\MSTR_UI\Dotnet` on MSTR machine.

3. For Tomcat

    a) Copy `MicroStrategy.war` from `<MicroStrategy home>\Web JSP` to InQuira machine `<inquira_install>\analytics\common\MSTR_UI\Java`.

    b.) Update the content of `<inquira_install>\analytics\common\MSTR_UI\logo.txt` with the actual partner's logo file path.

    c.) Execute `InquiraBrand.bat` in `<inquira_install>\analytics\common\MSTR_UI\Java`.

    d.) Copy `MicroStrategy_new.war` into MSTR machine: Tomcat `<Tomcat_install>\webapps`.

    e.) Rename the `MicroStrategy_new.war` to `MicroStrategy.war` under `<Tomcat_install>\webapps`.

    f.) If the directory `<Tomcat_install>\` contains a folder named `work` , delete it.

4. Start the Analytics server.

NOTE: When InQuira Analytics is upgraded, you must complete these four steps again to apply logos after finishing the upgrade.

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

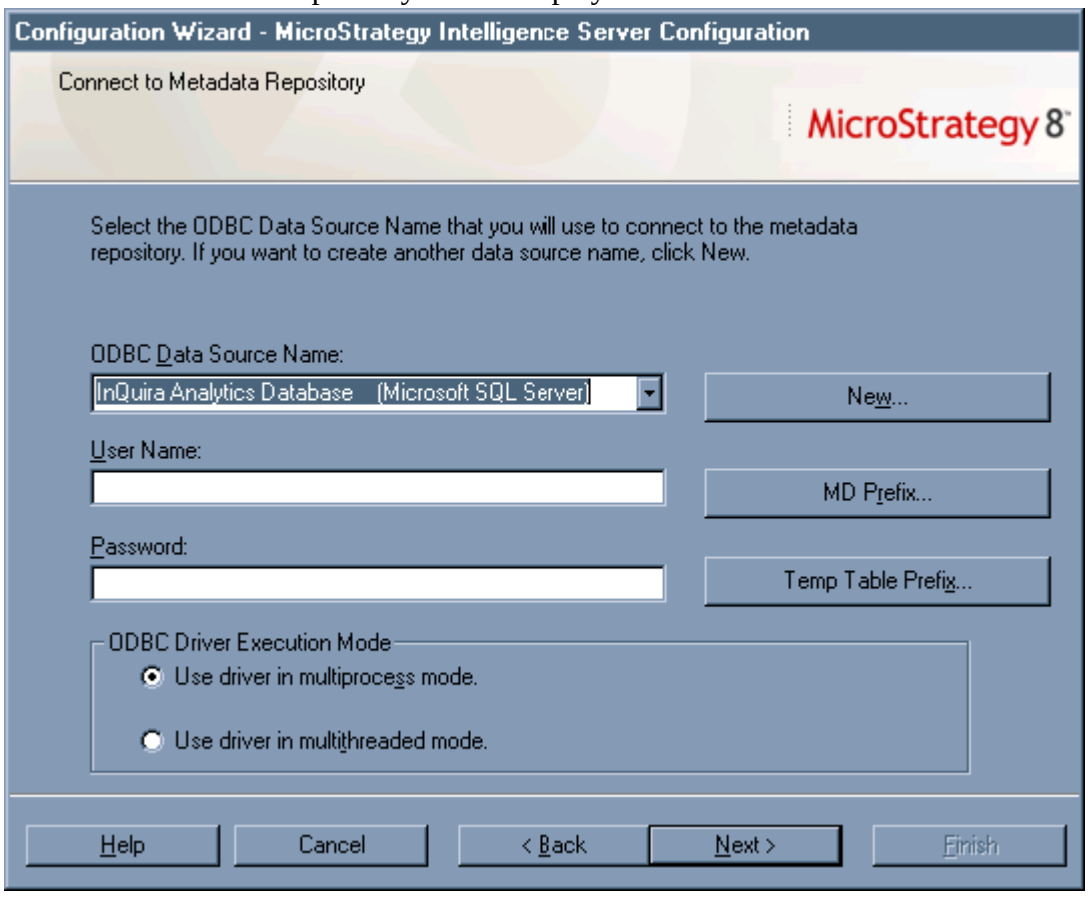
Starting the MicroStrategy Configuration Wizard

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.



- 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**.

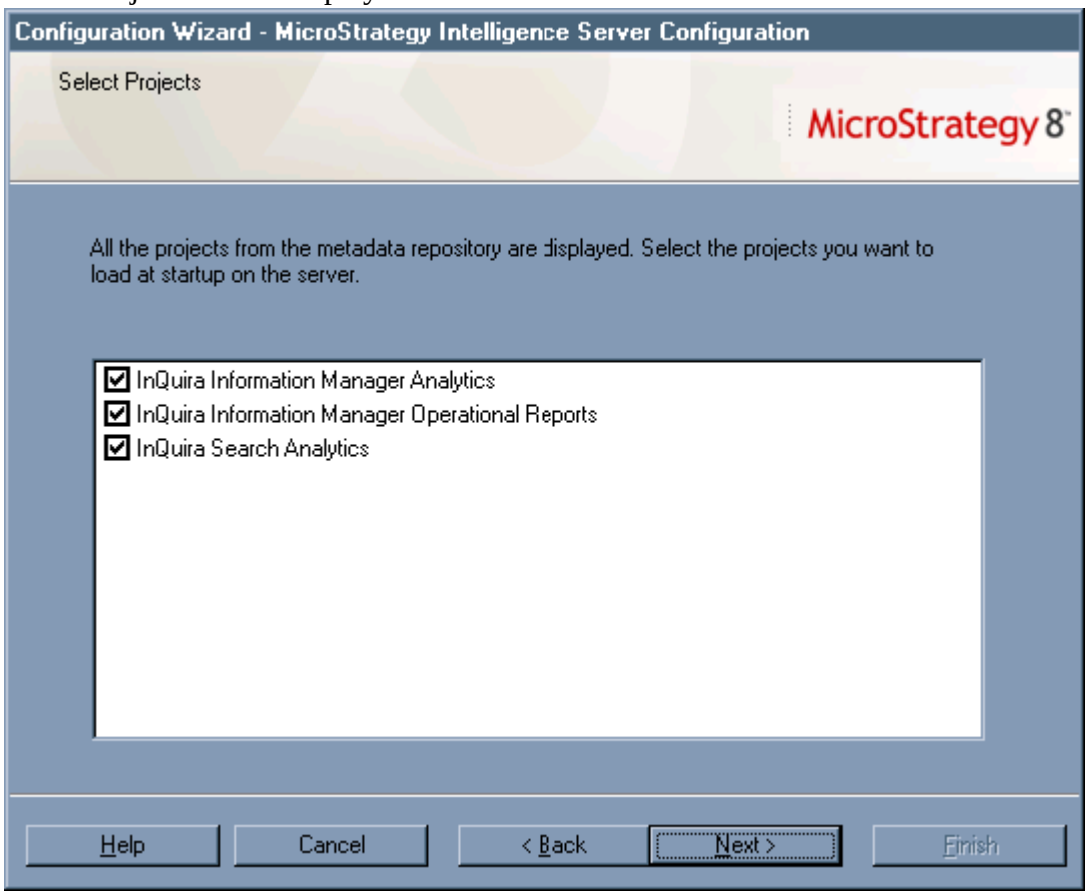
Specifying the Port Number

The Port Number screen displays.

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

Registering the InQuira 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.

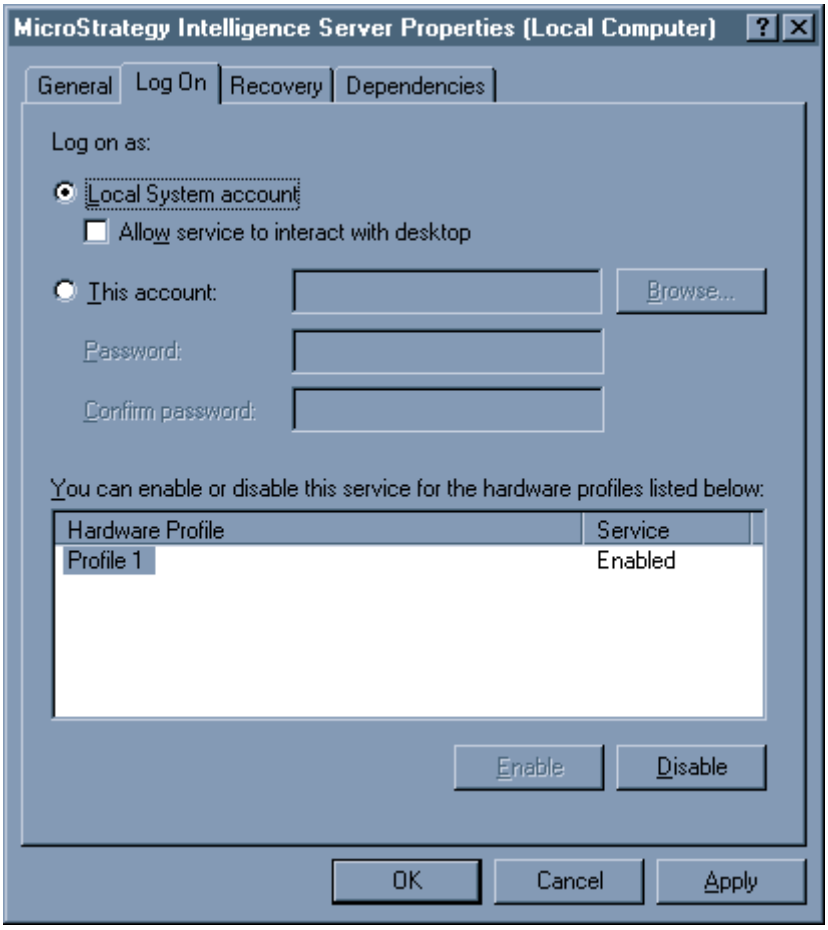
Restarting the MicroStrategy Intelligence Server

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 server'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.