Oracle® Financial Analyzer

Installation and Upgrade Guide

Release 11*i*

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Oracle Financial Analyzer Installation and Upgrade Guide, Release 11*i*

Part No. A96137-01

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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

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

Preface

What this manual is about

The *Oracle Financial Analyzer Installation and Upgrade Guide* provides the information that you need to install Oracle® Financial Analyzer (hereinafter referred to as "Financial Analyzer") on an NT or Unix server and on client PCs.

Intended audience

This manual is intended for individuals who will install Financial Analyzer.

Financial Analyzer documentation set

This manual is part of a set of documentation, which also includes the following documents:

- *Oracle Financial Analyzer User's Guide* — Describes the Financial Analyzer user environment and provides detailed information about how to perform database maintenance and document customization tasks.

- Online Help — Provides essential procedural and reference information for both system administrators and users. You can access Help in the following ways:

    - By choosing an option from the Help menu.

    - By pressing F1.

    - By choosing a **Help** command button.

- Release Notes — Highlight information for this version of Financial Analyzer, including release history, new features, product-specific functions, and known problems.

Structure of this document

The *Oracle Financial Analyzer Installation and Upgrade Guide* is structured as follows:

- Chapter 1 describes the requirements for both server and client installations and lists additional software that you can install for use with Financial Analyzer. Read this chapter before you begin installing.

- Chapter 2 provides procedures for server and client installations and lists the directory structures and files that are installed for each workstation type. This chapter also provides procedures for configuring Financial Analyzer Web Publishing and for configuring the Task Processor to run in the background.

- Chapter 3 describes how to upgrade Financial Analyzer from previous versions.

- Chapter 4 provides information about the configuration files that are installed and details the settings that must be specified for each workstation type.

- Chapter 5 explains how to manually install Administrator and Super administrator workstations as thick clients and as thin clients that are part of a cluster configuration.

- Appendix A describes how to troubleshoot errors that may occur during initial startup of a workstation.

- Appendix B explains how to rename or change the location of a shared database.

- Appendix C describes how to reduce the number of code databases on a single server.

- Appendix D describes the post-installation set up tasks for the AS Portlets. It also describes other AS Portlet maintainance tasks

Conventions

Text conventions

You will find the following text conventions in this document.

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

Mouse usage

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

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

Formats for key combinations and sequences

Key combinations and key sequences appear in the following formats.

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

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1

Before You Begin

Chapter summary

This chapter describes the requirements for installing Oracle® Financial Analyzer (hereinafter referred to as "Financial Analyzer") on a server and on a client PC. The chapter also describes additional software that you can install to use with Financial Analyzer.

List of topics

This chapter includes the following topics:

- Server Requirements
- Client Requirements
- Additional Software to Install for Use with Financial Analyzer
- Installation Components and Workstation Types
- Client Modes
- Selecting a Client Mode

Server Requirements

Express Server installation

Before you install Financial Analyzer, you must install, configure, and start up the appropriate release of Oracle Express Server (hereinafter referred to as "Express Server"), running as a service on Windows NT or Unix. Refer to the current *Oracle Financial Analyzer 11i Release Notes* for release information.

Configuring Express Server

For optimal support of Financial Analyzer, follow these guidelines:

- In the New-Install/Upgrade Configuration dialog box, choose **Configure as SNAPI and XCA Server.**

- In the Optional Modules Configuration dialog box, select the following optional features:

  - Shell Command support.

  - File Authorization support (for Unix installations only).

  - SQL-OUT support. This feature is required if you intend to use the Oracle General Ledger Integration Module, or bring data into Financial Analyzer using SQL.

For more information about installing, configuring, and starting up Express Server, refer to the *Express Installation and Configuration Guide* and the Express Installation Help system.

Express Server client support files

You must install client support files from the Express Server CD-ROM.

Important: After installing the client support files, verify that the location of the client support files is included in the ServerDBPath in the Express Server Instance Manager. Refer to Appendix A for more information.

Express Server Administrative Tools

You must install the Express Server Administration Tools from the Express Server CD-ROM.

Server hardware requirements

Refer to the *Oracle Financial Analyzer 11i Release Notes* for hardware information.

Server disk space requirements

Disk space requirements for installing Financial Analyzer on the server are as follows.

Component	Disk Space Requirements
Code databases	35MB
Shared databases	13MB
Personal databases for thin client workstations Super administrator Administrator Budget Analyst Task Processor Shell EIF files	 4MB 4MB 4MB 3MB 1MB 1MB

Important: The disk space requirements for the personal and shared databases are minimum guidelines only. You must consider the additional disk space that you will need as you add database structures and financial data to the system.

Client Requirements

Hardware requirements

In order to install Financial Analyzer, a PC must meet the following hardware requirements:

- A minimum of 32MB extended memory

- A CD-ROM reader

- A Windows-compatible monitor, VGA or higher resolution

- A Windows-compatible mouse

Disk space requirements

The following table lists minimum disk space requirements for installing the Financial Analyzer software on client workstations.

Component	Thick Client	Thin Client
SNAPI	1.55MB	1.55MB
User Interface	15MB	15MB
Code components	12MB	
Personal databases Super administrator Administrator Budget	 3MB 3MB 3MB	

Important: The disk space requirements are minimum guidelines only. For thick client workstations, you must also consider the additional disk space that you will need as you add database structures and financial data to the system.

Software requirements

In order to install Financial Analyzer, a PC must meet the following software requirements:

- Microsoft Windows 95, Windows 98, Windows 2000, or Windows NT 4.0.

- To install a thick client workstation you must install Personal Express on the PC.

Communications requirements

You must install TCP/IP support on the PC. TCP/IP is the network protocol used to communicate with Personal Express.

In exceptional cases, there may be a problem connecting to Personal Express using a TCP/IP product. If you suspect that your TCP/IP installation is causing a connection problem, notify Oracle Server Technical Support.

Swap file requirement for Windows NT

A Windows NT workstation requires a 15MB permanent swap file.

Additional Software to Install for Use with Financial Analyzer

Why you need to install additional software

If you want to use the Oracle Express Spreadsheet Add-In (hereinafter referred to as "Express Spreadsheet Add-In") or allow users to access Financial Analyzer through the Web, you must install and configure additional software. If you think you will want to use these features at any time in the future, you should install the software listed in the following topics before you install Financial Analyzer. You can install the additional software after you install Financial Analyzer if you decide that you need it later, but the installation process will be easier if you install the additional software first.

Financial Analyzer Web access

Software requirements

If users will access Financial Analyzer through the Web, you must install the following components on the same network as Express Server:

- Oracle Express Web Agent (hereinafter referred to as "Express Web Agent") software. Install this software from the Express Server CD-ROM.

- Web listener software. Oracle Corporation recommends that you install Oracle Web Application Server, which has a Web listener plus additional features.

For detailed instructions on how to install and configure each of these components, see the documentation for each component.

For information about configuring Financial Analyzer for Web access once you have installed the required components, see "Configuring Financial Analyzer for Web Access" on page 2-37.

Browser requirements

Users who will access Financial Analyzer through the Web must have one of the following browsers installed on the PC:

- Netscape, version 4.7.4 or higher.

- Microsoft Internet Explorer, version 5.01 or 5.5, with Java Virtual Machine (JVM) 5.*x.*

Oracle Corporation recommends the following minimums for browser cache settings:

- Memory cache — 4MB (Netscape only).
- Disk cache — 5MB.

Oracle Express Administrator

You must install the correct release of Oracle Express Administrator (hereinafter referred to as "Administrator") if you want to use it in conjunction with Financial Analyzer. Install Administrator from the Express Client CD-ROM.

Refer to the current *Oracle Financial Analyzer 11i Release Note*s for release information.

For detailed instructions about installing and configuring Administrator, refer to the *Express Installation and Configuration Guide* and the Express Installation Help system.

Express Spreadsheet Add-In

You must install the Express Spreadsheet Add-In if you want to use it in conjunction with Financial Analyzer. For detailed installation instructions, refer to the *Oracle Express Spreadsheet Add-In User's Guide.*

As Portlets

The AS Portlets make data from Financial Analyzer available to users of Oracle Portal.

Requirements

The following are required for installing the AS Portlets and making them available to users:

- The correct release of Oracle Portal must be installed
- The Java Portlet framework must be installed.
- Cabo/UIX must be installed.
- Business Intelligence Beans must be installed.
- A database schema, for which you have a user ID and password, must be available for storing the AS_PORTAL_DATABASE_LIST table. This is the table

in which you will need to enter information about the databases that you want to make available to users.

- The Web Listener Files component of the installation must have access to one or more instances of Oracle Sales Analyzer, including all Web components.

Note: Java Portlet Framework, Cabo/UIX, and Business Intelligence Beans are available on `http://technet.oracle.com`.

Related information

For more information on installing AS Portlets, refer to the following:

- For current software release information, refer to the current *Oracle Financial Analyzer 11i Release Note*s.
- For detailed information about how to install this component, refer to the topic "Procedure: Completing the AS Portlets component installation" on page 2-17.
- For information on setting up and maintaining AS Portlets, refer to Appendix D.

Installation Components and Workstation Types

Installation components

Before you install Financial Analyzer, you should design your system configuration.

There are three server components available:

1. Super administrator Component —This component must be installed first. Selecting this component installs all the necessary files and directories including the personal database for the Super administrator workstation. All other users of this component will be created through the Super administrator workstation using the Manage Users option.

2. Administrator Component — Selecting this component installs all the necessary files and directories for an Administrator workstation. The Administrator workstation's personal database is not created during this installation but when an Administrator workstation user is created in the superior Administrator workstation.

3. Cluster Component — Installing this component installs all the necessary files and directories to support a cluster of Budget workstations. You install a cluster

component if a community of users is located on a different server from the Administrator's shared database, or if the community of users wants to use a different instance of Express Server.

These components can be installed on different NT or Unix servers. For example, you can install a Super administrator component on a Unix server and a cluster component on a NT server.

For more information about typical configurations and data distribution, see the *Oracle Financial Analyzer User's Guide.* For more information on creating users, refer to the topic "Creating Users" in the Financial Analyzer Help system.

Workstation types

Each component is made up of a number of workstations. You can install the following types of Financial Analyzer workstations.

Super administrator workstation

This workstation type enables the administrator at the highest level to perform the following functions:

- Define database structures and documents for system-wide use
- Control subordinate administrators' and users' access to financial data
- Process tasks submitted by users to update the Super administrator's shared database

Note: There can be only one Super administrator workstation for each Financial Analyzer installation.

Administrator workstation

This workstation type enables an administrator to perform the following functions:

- Define database structures and documents for users who report to the administrator
- Control users' access to financial data
- Process tasks submitted by users to update the administrator's shared database

In a multi-tiered installation, a Super administrator controls these administrators' access to financial data, and distributes structures and documents to them.

Task Processor workstation

This workstation type enables an administrator to monitor and control the transfer of data and structures between user workstations and the administrator's shared database.

A Task Processor workstation is automatically installed with each Administrator workstation. You can dedicate a client to running the Task Processor, which enables your system to process tasks without interruption, or you can launch the Task Processor as a background process on the server.

Budget workstation

This workstation type enables a user to prepare budgets and perform sophisticated financial analyses using models, worksheets, reports, and graphs.

Budget workstation users can accept slices of financial data from a shared database, work with the data locally in their personal database, and submit the changed data back to the shared database, where it can be accessed by other users. Each Budget workstation user keeps his or her personal database current by refreshing it periodically with data from the shared database.

Analyst workstation

This workstation type enables a user to create worksheets, reports, and graphs for analyzing and reporting financial data by working directly with the shared database. Although the primary purpose of an Analyst workstation is to analyze existing data rather than to contribute new data, an analyst is able to make ad hoc changes to data in the shared database using a worksheet.

Related information

For more information about workstation types and typical configurations, see the *Oracle Financial Analyzer User's Guide.*

Client Modes

Client configuration options

When you set up Oracle Financial Analyzer for a Super administrator, Administrator, or Budget workstation, you decide whether the user will access the server in *thin client* mode or *thick client* mode.

Note: The standard installation process allows you to install only a Budget workstation as a thick client. To manually configure Administrator or Super administrator workstations as thick clients, refer to Chapter 5.

Thick client mode: Description

When a workstation is set up as a thick client, the following components reside on the PC:

- The Financial Analyzer personal database for the workstation
- The Financial Analyzer code components
- The Personal Express Server software
- The Financial Analyzer client component

The shared databases and shared code components are located on a server. The majority of processing occurs on the PC. Connection to the server is made only when necessary, such as when data is refreshed or submitted.

When a connection between the PC and the server is not available, the user of a thick client workstation can work in a stand-alone session, disconnected from the server. Refer to the *Oracle Financial Analyzer User's Guide* for more information about stand-alone sessions.

Thick client mode: Illustration

The following figure illustrates a thick client configuration.
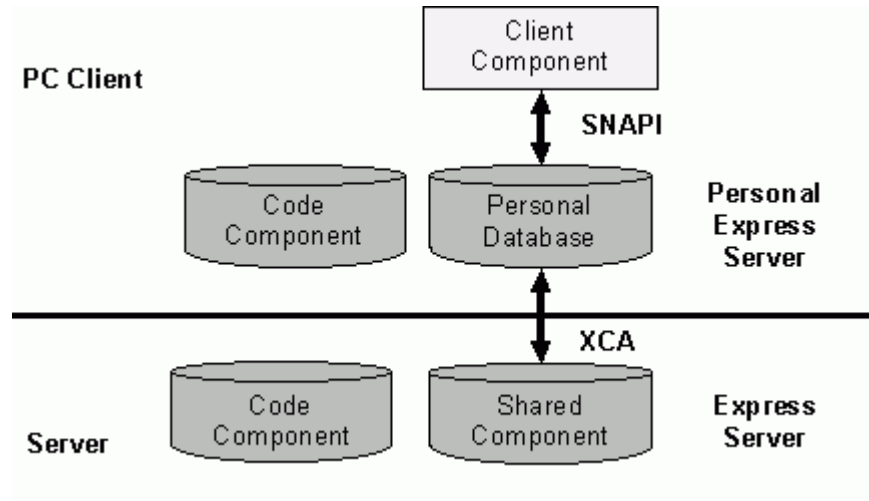
As shown in the figure, in thick client mode:

- The application programming interface (API) between the Financial Analyzer client component and the Financial Analyzer personal database using Personal Express on the PC is SNAPI (Structured N-Dimensional API).

- The interface between the Financial Analyzer personal database and the Financial Analyzer shared component using Express Server on the server is XCA (Express Communications Architecture).

Thin client mode: Description

When a workstation is set up as a thin client, only the Financial Analyzer client component resides on the PC. The personal database, Express Server software, and shared and code components reside on the server.

The majority of processing occurs on the server. A connection to the server is always necessary. If the connection cannot be made, the workstation cannot start up.

Thin client mode: Configuration options

There are two configuration options for thin client mode:

- The personal database resides on the same server as the shared component running under a common instance of Express Server.

- The personal database is associated with one instance of Express Server while the shared component is associated with a different instance of Express Server. This type of thin client configuration is called a *cluster.*

  In the cluster configuration, both instances of Express Server can be installed on the same physical server, or each instance can be installed on a different physical server.

Thin client mode: Illustration of personal database associated with the same instance of Express Server as the shared component

The following figure illustrates a thin client configuration in which the personal database and shared component are associated with the same instance of Express Server.
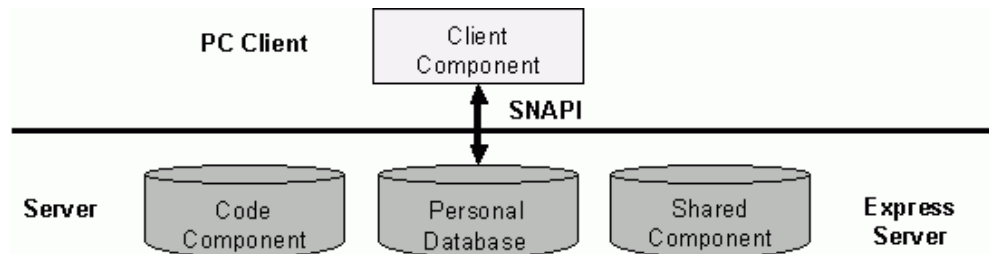
As shown in the figure, in this thin client configuration, the application programming interface (API) between the Financial Analyzer client component and the Financial Analyzer personal database using Express Server on the server is SNAPI (Structured N-Dimensional API).

Thin client mode: Illustration of personal database associated with a different Express Server instance than the shared component

The following figure illustrates a thin client configuration in which the personal database is associated with a different instance of Express Server than the shared component.
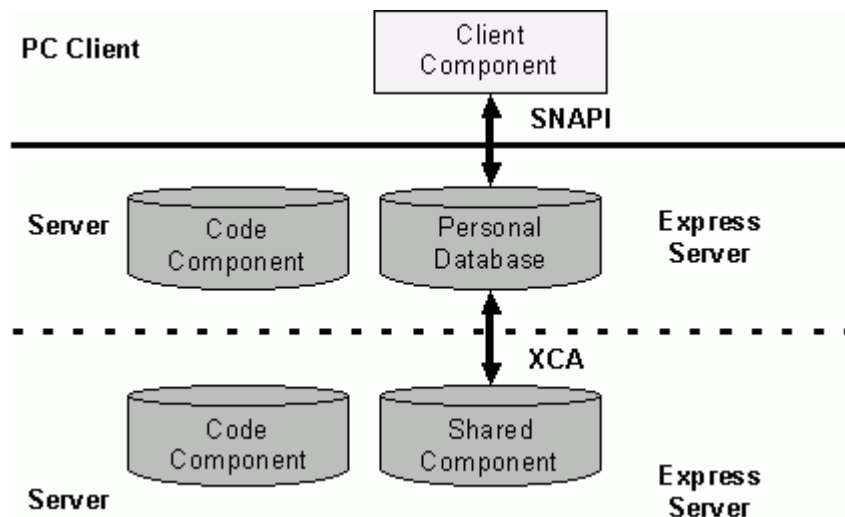
As shown in the figure, in this thin client configuration:

- The application programming interface (API) between the Financial Analyzer client component and the Financial Analyzer personal database using Express Server on the server is SNAPI (Structured N-Dimensional API).

- The interface between the Financial Analyzer personal database using Express Server on the workstation's server and the Financial Analyzer shared component using Express Server on the shared component server is XCA (Express Communications Architecture).

- The dashed line indicates that the personal and shared databases can be on two different physical servers, or they can be on the same physical server. In a typical cluster configuration the personal and shared databases are on two different physical servers, but this type of configuration is not required.

Selecting a Client Mode

Issues to consider

Whether a workstation should be set up in thin client mode or thick client mode depends on the workstation type and platform as well as on issues of mobility and performance.

Workstation type, platform, and client mode

All workstation types can be set up in thin client mode.

Note: Task Processor and Analyst workstations on all platforms *must* be set up in thin client mode.

When used in a cluster environment, the following types of workstations can be set up in thick or thin client mode:

- Super administrator workstation

- Administrator workstations

- Budget workstations

Note: You cannot use Oracle Universal Installer (hereinafter referred to as "Installer") or the Financial Analyzer Manager User option to set up Administrator and Super administrator workstations as thick client workstations in a cluster. Instead, you must set them up manually as described in Chapter 5.

Mobility and client mode

If the platform and workstation type support thick client access and the user requires the ability to work in a stand-alone session disconnected from the server, then the workstation should be set up as a thick client.

Performance and client mode

The following table compares performance issues for thick client and thin client modes.

Performance Issue	Thick Client	Thin Client	Thin Client in a Cluster
Network traffic	Infrequent but high volume when refreshing and submitting data.	Frequent but low volume.	Frequent but low volume to the local server. Infrequent but high volume to the shared server when refreshing and submitting.
Data distribution	Refreshing and submitting data is slower, because the personal and shared databases are not on the same server.	Refreshing and submitting data is faster, because the personal and shared databases are on the same server.	Refreshing and submitting data is slower, because the personal and shared databases are not on the same server.
Demands on remote system	Relatively low because most processing occurs on the PC.	Relatively high because most processing occurs on the server.	Low because processing occurs on the local server.
System performance	Can be improved for an individual workstation by upgrading the PC, because most processing occurs on the PC. However, this requires a high specification PC.	Can be improved for all users by upgrading the server, because most processing occurs on the server.	Can be improved for users of the cluster by upgrading the server, because most processing occurs on the server.

2

Installing the Software

Chapter summary

This chapter explains how to install the server and client components of Financial
Analyzer and set correct directory and file access. The chapter also provides
information about configuring Financial Analyzer for Web access and setting up the
Task Processor to run in the background.

List of topics

This chapter includes the following topics:

- Determining Which Server Component to Install

- Installing Financial Analyzer on the Server

- Understanding the Installed Server Directories and Files

- Installing Financial Analyzer on Client PCs

- Performing a Single-user Installation on a Client PC

- Performing a Shared Installation on a Client PC

- Understanding the Installed Client Directories and Files

- Setting Directory and File Access

- Financial Analyzer Database Security

- Configuring Financial Analyzer for Web Access

- Configuring the Task Processor to Run in the Background

- Starting Financial Analyzer for the First Time

Determining Which Server Component to Install

Introduction

Before you can create a user of any type, you must first use Installer to install an environment for that user. This environment, called a *component*, contains shell databases and configuration files for that user.

Your first task is to determine which component you will install. The following server components are available for Financial Analyzer:

- Super administrator
- Administrator
- Cluster
- Web
- Single Sign-On
- AS Portlets

Super administrator component

You must install a Super administrator component before installing any other component type.

After installing this component, all other users of this component will be created through the Super administrator workstation using the Users option from the Manage menu. For detailed information about how to perform this task, refer to the topic "Creating Users" in the Financial Analyzer Help system.

Administrator component

If you install an Administrator component you must create the personal database for that component by creating an Administrator workstation using the superior Administrator workstation. For detailed information about how to perform this task, refer to the topic "Creating Users" in the Financial Analyzer Help system.

Cluster component

If you have installed a cluster component you can install the Budget workstation personal databases for that component by creating Budget workstations in the

Administrator of that component. For detailed information about how to perform this task, refer to the topic "Creating Users" in the Financial Analyzer Help system.

Note: If you are installing more than one Administrator component that will use the same instance of Express Server, see Appendix B for information about renaming shared databases.

Web component

You should only install the Financial Analyzer Web component separately if you want to place the Web component on a different computer from the one that Express Server is running on.

Single Sign-On component

You should install Single Sign-On only if you plan to use this functionality with Oracle Applications for Financial Analyzer Web users. For detailed information about how to perform this task, refer to the topics "Implementing Single Sign-on" on page 2-40 and "Procedure: Completing the Single Sign-On component installation" on page 2-13.

AS Portlets component

The AS Portlets make data from Financial Analyzer available to users of Oracle Portal. For detailed information about how to install this component, refer to the topic "Procedure: Completing the AS Portlets component installation" on page 2-17. For information on setting up and maintaining AS Portlets, refer to Appendix D.

Installing Financial Analyzer on the Server

Introduction

The following procedures explain how to install a Financial Analyzer component on the server.

Procedure: Beginning the server installation

Follow these steps to begin installing Financial Analyzer on the server:

1. Ensure that Express Server is installed and configured on the server.

> **Note:** For Windows NT systems, make sure that the SecurityLevel setting in Configuration Manager is *not* set to DOMAIN.

2. Insert the Financial Analyzer Server CD-ROM into the CD-ROM drive and run `f:\setup.exe`, where "f" represents your CD-ROM drive.

3. In the Welcome dialog box, choose **Next**.

4. In the File Locations dialog box under **Destination**, specify the name and path of the Oracle Home that you want to use, then choose **Next**.

5. The Available Products dialog box appears. It provides the following list of installable components:

    - Super administrator

    - Administrator

    - Cluster

    - Web Listener Files

    - Single Sign-On

    - AS Portlets

    Select the component that you want to install; then choose **Next.**

6. Complete the installation of the component that you selected, as follows.

IF you chose . . .	THEN follow the instructions in . . .
Super administrator,	"Procedure: Completing the Super administrator component installation" on page 2-5
Administrator,	"Procedure: Completing the Administrator component installation" on page 2-8
Cluster,	"Procedure: Completing the Cluster component installation" on page 2-11
Web,	"Procedure: Completing the Web Listener Files component installation" on page 2-11
Single Sign-On,	"Procedure: Completing the Single Sign-On component installation" on page 2-13
AS Portlets	"Procedure: Completing the AS Portlets component installation" on page 2-17

Note: If more than one Super administrator, Administrator, or cluster component is installed on the same server, you must specify a unique Oracle Home for each component.

Procedure: Completing the Super administrator component installation

The following procedure describes the additional steps to follow if you are installing the Super administrator component.

Note: This procedure provides all of the steps for the Complete installation type (described below). If you choose the Typical installation type, which is composed of a subset of the steps in the Complete installation, skip the steps that are related to Financial Analyzer Web.

1. In the Installation Types dialog box, select the type of installation that you want to perform from the following choices:

   - Typical — This type of installation installs the Super administrator component only.

   - Complete — This type of installation installs both the Super administrator and Web components.

   When you have completed this task, choose **Next.**

   Result: The Component Location dialog box appears

2. In the Path box of the Component Location dialog box, specify the path for the location into which you want to install the Super administrator component.

   When you have completed this task, choose **Next.**

   Note: If you are installing on the Unix platform, do not use uppercase letters or spaces in the path. If you are installing on the Windows NT platform, do not use spaces in the path.

   Result: Depending on you Express Server installation, one of the following can occur:

   - If Installer cannot locate the Express Server home, the Express Server dialog box appears. Proceed to Step 3.

   - If Installer locates more than one Express Server home, the Express Server Instance dialog box appears. Proceed to Step 4.

   - If Installer locates the Express Server home, the Personal Database Information dialog box appears. Proceed to Step 5.

3. If Installer cannot locate the Express Server home, the Express Server dialog box appears. In the Path box of the Oracle Express Server dialog box, enter the path of the Express Server home. You can type the path into the box, or you can click the **Browse** button to access the Choose Directory dialog box, where you can navigate to the appropriate location.

   When you have completed this task, choose **Next.**

   Result: The Personal Database Information dialog box appears. Proceed to Step 5.

4. If Installer locates more than one Express Server home, the Express Server Instance dialog box appears. Select the Express Server instance that you would like to configure as a Financial Analyzer Express Server.

   When you have completed this task, choose **Next.**

   Result: The Personal Database Information dialog box appears. Proceed to Step 5.

5. In the Personal Database Information dialog box, specify the following information related to the personal database:

   - The name of the Super administrator's personal database

   - The server name

   - The port number for Express Server

   - The language in which information will be displayed to your Web users

   When you have completed this task, choose **Next.**

   Result: The JInitiator Use dialog box appears.

6. In the JInitiator Use dialog box, specify whether you want to use JInitiator when you run Financial Analyzer Web.

   Note: If you are using other Oracle products, it is recommended that you use JInitiator. If you do not use other Oracle products, you may choose not to use JInitiator because of its additional disk space requirements.

   When you have completed this task, choose **Next.**

   Result: The General Ledger Integration dialog box appears.

7. In the General Ledger Integration dialog box, specify whether you want to install the Oracle General Ledger integration module.

Note: The Oracle General Ledger integration module allows Financial Analyzer users to load data from Oracle General Ledger into Financial Analyzer for analysis purposes, and to write Financial Analyzer budget data back to Oracle General Ledger.

When you have completed this task, choose **Next.**

Result: The Web Listener Information dialog box appears.

8. In the Web Listener Information dialog box, specify the following information:

   - The Web listener name

   - The Web listener port number

   - A description of the shared database

   - The CGI-bin Alias, which is the name of the virtual directory that specifies the physical directory that contains the Oracle OLAP Web Agent executable file, OOWA.EXE

   When you have this task, choose **Next.**

   Result: The Web Access Method dialog box appears.

9. In the Web Access Method dialog box, select one of the following options to specify how your users' browsers will load the files that are needed to run Financial Analyzer Web:

   - **Load files from the network every time the user logs in** — Financial Analyzer. This option requires less storage on client PCs, but is slower.

   - **Load files from the network once; then store them on the client PC** — This option provides better performance, but requires more storage on the client PC.

   When you have completed this task, choose **Next.**

   Result: The Summary dialog box appears.

10. Review the information in the Summary dialog box to ensure that it is correct; then choose **Install.**

   Result: Installer installs the Super administrator component. When the installation is complete, the End of Installation dialog box appears.

11. If you chose the Complete installation type, then Installer automatically checks if Oracle WebServer IAS is installed on the machine where the application or component is currently being installed. .

If Installer detects Oracle WebServer IAS, then you are prompted to configure it automatically.

If you select **Yes**, then Installer configures Oracle WebServer IAS.

If you select **No** or if Installer does not detect the Oracle WebServer IAS on the machine where the application or component is being installed, then an End of Installation dialog box is displayed. Note the directory information that is displayed in the End of Installation dialog box. You will need to use this information when you add virtual directories to the Web listener, as described in the topic "Configuring Financial Analyzer for Web Access" on page 2-37

12. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Procedure: Completing the Administrator component installation

The following procedure describes the additional steps to follow if you are installing the Administrator component.

Note: This procedure provides all of the steps for the Complete installation type (described below). If you choose the Typical installation type, which is composed of a subset of the steps in the Complete installation, skip the steps that are related to Financial Analyzer Web.

1. In the Installation Types dialog box, select the type of installation that you want to perform from the following choices:

- Typical — This type of installation installs the Administrator component only.

- Complete — This type of installation installs both the Administrator and Web components.

Note: This procedure documents all of the steps that are part of a Complete installation. If you are performing a Typical installation, skip the steps that are related to Financial Analyzer Web.

When you have completed this task, choose **Next.**

Result: The Component Location dialog box appears

2. In the Path box of the Component Location dialog box, specify the path for the location into which you want to install the Super administrator component.

When you have completed this task, choose **Next.**

Note: If you are installing on the Unix platform, do not use uppercase letters or spaces in the path. If you are installing on the Windows NT platform, do not use spaces in the path.

Result: Installer searches for the Express Server home.

3. If Installer cannot locate the Express Server home, the Express Server dialog box appears. In the Path box of the Oracle Express Server dialog box, enter the path of the Express Server home. You can type the path into the box, or you can click the **Browse** button to access the Choose Directory dialog box, where you can navigate to the appropriate location.

When you have completed this task, choose **Next.**

Result: The Oracle Express Server Instance Name dialog box appears.

4. In the Oracle Express Server Instance Name dialog box, specify the name of the Express Server instance that you want to configure to support Financial Analyzer.

When you have completed this task, choose **Next.**

Result: The Specify Language dialog box appears.

5. In the Specify Language dialog box, select the language that will appear to your users in Financial Analyzer Web.

When you have completed this task, choose **Next.**

Result: The JInitiator Use dialog box appears.

6. In the JInitiator Use dialog box, specify whether you want to use JInitiator when you run Financial Analyzer Web.

When you have completed this task, choose **Next.**

Result: The Web Listener Information dialog box appears.

7. In the Web Listener Information dialog box, specify the following information:

   - The Web listener name

   - The Web listener port number

   - A description of the shared database

   - The CGI-bin Alias, which is the name of the virtual directory that specifies the physical directory that contains the Oracle OLAP Web Agent executable file, OOWA.EXE

   When you have this task, choose **Next.**

Result: The Web Access Method dialog box appears.

8. In the Web Access Method dialog box, select one of the following options to specify how your users' browsers will load the files that are needed to run Financial Analyzer Web:

    ■   **Load files from the network every time the user logs in** — Financial Analyzer. This option requires less storage on client PCs, but is slower.

    ■   **Load files from the network once; then store them on the client PC** — This option provides better performance, but requires more storage on the client PC.

    When you have completed this task, choose **Next.**

    Result: The Summary dialog box appears.

9. Review the information in the Summary dialog box to ensure that it is correct; then choose **Install.**

    Result: Installer installs the Administrator component. When the installation is complete, the End of Installation dialog box appears.

10. If you chose the Complete installation type, then Installer automatically checks if Oracle WebServer IAS is installed on the machine where the application or component is currently being installed. .

    If Installer detects Oracle WebServer IAS then you are prompted to configure it automatically.

    If you select **Yes**, then Installer configures Oracle WebServer IAS

    If you select **No** or if Installer does not detect the Oracle WebServer IAS on the machine where the application or component is being installed, then an End of Installation dialog box is displayed. Note the directory information that is displayed in the End of Installation dialog box. You will need to use this information when you add virtual directories to the Web listener, as described in the topic "Configuring Financial Analyzer for Web Access" on page 2-37

11. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Procedure: Completing the Cluster component installation

The following procedure describes the additional steps to follow if you are installing the Cluster component.

1. In the Path box of the Component Location dialog box, specify the path for the location into which you want to install the Cluster component.

    When you have completed this task, choose **Next.**

    Note: If you are installing on the Unix platform, do not use uppercase letters or spaces in the path. If you are installing on the Windows NT platform, do not use spaces in the path.

    Result: The Summary dialog box appears.

2. Review the information in the Summary dialog box to ensure that it is correct; then choose **Install.**

    Result: Installer installs the Cluster component. When the installation is complete, the End of Installation dialog box appears.

3. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Procedure: Completing the Web Listener Files component installation

The following procedure describes the additional steps to follow if you are installing the Web Listener Files.

1. In the Path box of the Directory of Shared Database dialog box, specify the location of the Financial Analyzer shared database.

    You can type the path into the box, or you can choose the **Browse** button to open the Choose Directory dialog box, in which you can choose the appropriate directory.

    When you have completed this task, choose **Next.**

    Result: The Web Listener Information dialog box appears.

2. In the Web Listener Information dialog box, specify the following information:

    - The Web listener name

    - The Web listener port number

    - A description of the shared database

- The CGI-bin Alias, which is the name of the virtual directory that specifies the physical directory that contains the Oracle OLAP Web Agent executable file, `OOWA.EXE`

When you have this task, choose **Next.**

Result: The Web Access Method dialog box appears.

3. In the Web Access Method dialog box, select one of the following options to specify how your users' browsers will load the files that are needed to run Financial Analyzer Web:

   - **Load files from the network every time the user logs in** — Financial Analyzer. This option requires less storage on client PCs, but is slower.

   - **Load files from the network once; then store them on the client PC** — This option provides better performance, but requires more storage on the client PC.

   When you have completed this task, choose **Next.**

   Result: The Summary dialog box appears.

4. Review the information in the Summary dialog box to ensure that it is correct; then choose **Install.**

   Result: Installer installs the Web component. When the installation is complete, the End of Installation dialog box appears.

5. Installer automatically checks if Oracle WebServer IAS is installed on the machine where the application or component is currently being installed. .

   If Installer detects Oracle WebServer IAS then you are prompted to configure it automatically.

   If you select **Yes**, then Installer configures Oracle WebServer IAS.

   If you select **No** or if Installer does not detect the Oracle WebServer IAS on the machine where the application or component is being installed, then an End of Installation dialog box is displayed. Note the directory information that is displayed in the End of Installation dialog box. You will need to use this information when you add virtual directories to the Web listener, as described in the topic "Configuring Financial Analyzer for Web Access" on page 2-37

6. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Procedure: Completing the Single Sign-On component installation

The following procedure describes the additional steps to follow if you are installing Single Sign-On.

1. If Installer cannot locate the Oracle Required Support Files, the Required Support Files dialog box appears.

    In the Path box, specify the Oracle home where the Oracle Required Support Files are located.

    You can type the path into the box, or you can click the **Browse** button to access the Choose Directory dialog box, where you can navigate to the appropriate location.

    When you have completed this task, click **Next**.

    Result: The FND_TOP Environment Variable dialog box appears.

2. In the Path box of the FND_TOP Environment Variable dialog box, specify the directory location to be stored in the FND_TOP environment variable.

    Note: This environment variable contains the root directory path for the /secure directory, where the appropriate database connection (.dbc) file currently resides, or where a new database connection file will be created. The information in this file is used by Single Sign-On to make a connection to Oracle Applications.

    You can type the full path into the box, or you can click the **Browse** button to access the Choose Directory dialog box, where you can navigate to the appropriate location.

    When you have completed this task, click **Next**.

    Results: Depending on whether Installer can locate a database connection (.dbc) file, one of the following results occurs:

    -   If the location that you specified in the FND_TOP Environment Variable dialog box contains one or more database connection files, the Oracle OLAP Single Sign-On dialog box appears and Installer prompts you to select the appropriate database connection file from a drop-down list of all of the connection files in the directory.

        Note that the first option in the list is <New .dbc>, which you can use to create a new database connection file, even if others exist.

- If there are no connection files in `$FND_TOP/secure`, the New Database Connection File Configuration Information dialog box appears immediately so that you can create one. Proceed to Step 4.

3. If the `.dbc` file that you need exists in `$FND_TOP/secure`, select it from the drop-down list in the Database Connection Files box of the Oracle OLAP Single Sign-On dialog box.

   When you have completed this task, click **Next.**

   Results: One of the following results occurs, depending on whether you are installing on Unix or NT.

   - If you are installing on Unix, the Remote Operation Connection Settings dialog box appears. Skip Steps 4 and 5, and follow the information in Step 6 that applies to Unix installations.

   - If you are installing on NT, the Communication Protocol dialog box appears. Go on to Step 5.

4. If there are no connection files in the directory, or if you select `<New.dbc>`, the New Database Connection File Configuration Information dialog box appears.

   Use this dialog box to specify the following connection configuration information:

   - File Name — Specify the name of the database connection file that you are creating.

     The default file name is `<machine_name>_<SID>.dbc`.

   - Connect String — Specify the SQL*Net name of the database. This name is also used as the label in the `tnsnames.ora` file, under which the information needed to connect to the RDBMS is to be stored.

     Note: The `TWO_TASK` environment variable contains this information.

   - FNDNAM — Specify the ID for the Application Objects Library (AOL) schema. This is also the Oracle User that will be used for connection to Oracle 8*i*.

     Note: The value for FNDNAM is usually `apps`.

   - GWYUID — Specify the Oracle User/Password combination of the public account to be used for the initial Oracle Applications connection to the Oracle 8*i* database.

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

- Server ID — If Application Server Security is enabled on this database, specify the ID of the Oracle Applications server.

  Note: If Application Server Security is not enabled, this field can be left blank.

- Guest Applications User — Specify the Applications User/Password of the Guest user.

  Note: The Guest Applications User is a public Applications user with no responsibilities assigned.

When you have completed this task, click **Next.**

Results: One of the following results occurs, depending on whether you are installing on NT or Unix.

- If you are installing on Unix, the Remote Operation Connection Settings dialog box appears. Skip Step 5 and follow the information in Step 6 that applies to Unix installations.

- If you are installing on NT, the Communication Protocol dialog box appears. Go on to Step 5.

5. For NT installations, in the Communication Protocol dialog box, specify the networking protocol that is appropriate to your network from the following choices:

   - MS-RPC (Remote Procedure Call) — Used for NT Web server to NT Express Server installations.

   - Remote Operations — Used for Unix Express Server to NT Web server installations.

When you have completed this task, click **Next.**

Result: Depending on the selection you made, one of the following results occurs:

- If you selected MS-RPC, the MS-RPC Connection Settings dialog box appears.

- If you selected Remote Operations, the Remote Operation Connection Settings dialog box appears.

6. In the MS-RPC or Remote Operation Connection Settings dialog box, specify the appropriate connection settings for the networking protocol that you selected, as follows:

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

    * Instance Name — Specify the name for the instance of Express Server to which you want to connect. You can find the instance name using the Express Instance Manager.

    * Host — Specify the host name or IP address for the remote system on which Express Server is running.

    * UUID — Specify the unique universal identifier (UUID) for a specific Express Server instance, if multiple instances of Express Server are running on the server.

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

    * Instance Name — Specify the name for the instance of Express Server to which you want to connect. You can find the instance name using the Express Instance Manager.

    * Host — Specify the host DNS name or IP address for the remote system on which Express Server is running.

    * RO Port — Specify the port number of the Remote Operations Listener.

      Note: This is the value of the `ROListenPort` parameter, which was set in the Express Instance Manager when you installed Express Server.

- For Unix installations, enter the following information:

    * Instance Name — Specify the name for the instance of Express Server to which you want to connect.

    * Host — Specify the host name or IP address for the remote system on which Express Server is running.

    * RO Port — Specify the port number of the Remote Operations Listener.

      Note: This is the value of `ROListenPort` parameter, which was set in the Express Instance Manager when you installed Express Server. For more information, refer to the Express Instance Manager online Help topics.

When you have completed this task, click **Next.**

Result: The Summary dialog box appears.

7. Review the information in the Summary dialog box to ensure that it is correct; then choose **Install.**

    Result: Installer installs the Single Sign-On component. When the installation is complete, the End of Installation dialog box appears.

8. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Procedure: Completing the AS Portlets component installation

Note: For a list of requirements for installing the AS Portlets and making them available to users, refer to "As Portlets" on page 1-18.

During the installation, you will need to specify the following information related to the host system on which the Oracle server is running:

- The TNS name (for UNIX installations only)
- The name of the host system
- The system ID (SID)
- The port number

The following procedure describes the additional steps to follow if you are installing AS.Portlets:

1. In the Installation Types dialog box, select the type of AS Portlet installation you want to perform and click **Next**:

    - **Single node** — You can install the AS Portlets Express Files component and the AS Portlets Web Listener Files component on the same server.

    - **Multi-node** — If you prefer, you can distribute the functionality of the AS Portlets across multiple servers by installing the AS Portlets Express Files component and the AS Portlets Web Listener Files component on different servers.

    Note: The following requirements apply for multi-node installations

    - You must install the Express files on *each* server on which there is a Financial Analyzer instance to which the portlets require access.

    - You must install the Web Listener files on the server where the Web Listener is running.

Result: Depending on the installation type you selected you should proceed as follows:

- If you select the **Multi Node** installation type, then proceed to Step 2.

- If you select the **Single Node** installation type, then proceed to Step 4.

2. If you selected **Multi Node** in Step 1, then the Available Product Components dialog box appears.

   The following table shows the numbers of the steps in this procedure that correspond to the product components that you select in this dialog box. After you select one or more components, click **Next** and proceed to the next step that applies to your selections.

Product Component	Relevant Steps
Java Runtime environment	3, 9, and 10
AS Portlets Express Files	4, 5, 9, and 10
AS Portlets Web Listener Files	6, 7, 8, 9, and 10

3. If you selected **Jave Runtime Environment** in Step 2, then the Component Location dialog box appears.

   You can select an alternative location for the Java Runtime Environment that will be installed. The list box shows the component or components for which the location may be changed.

   To show all components, select **Show all components to be installed**. For more information on a specific component, move the mouse cursor over the component in the list box and hold it there briefly to display a pop-up description.

   For components in which you can change location, selecting a component displays a **Destination Location** field that you can edit and a **Change Location** button to browse for alternative locations.

   The Destination Location field enables you to change the location of the component.

   The **Change Location** button allows you to browse for possible alternative locations for the components.

   Available Disk Space shows the available disk space. By default, the disk space is shown for the volume to which the files will be copied.

When you have completed this task, click **Next.**

Result: Depending on the installation type you selected you should proceed as follows:

- If you also selected **AS Portlets Express Files** in Step 2 or you selected the **Single Node** installation type in Step 1, then proceed to Step 4.or Step 5.

- If you also selected **AS Portlets Web Listener Files** in Step 2, then proceed to Step 6.

- If you did not select any other product components in Step 2, then proceed to Step 9.

4. If Installer cannot locate the Express Server home, the Express Server dialog box appears.

   If Installer locates one or more Express Server homes, the Express Server Instance dialog box appears. Proceed to Step 5.

   In the Path box of the Oracle Express Server dialog box, enter the path of the Express Server home. You can type the path into the box, or you can click the **Browse** button to access the Choose Directory dialog box, where you can navigate to the appropriate location.

   When you have completed this task, choose **Next.**

   Result: Depending on the installation type or pruct components you selected you should proceed as follows:

   - If you also selected **AS Portlets Web Listener Files** in Step 2 or you selected the **Single Node** installation type in Step 1, then proceed to Step 9.

   - If you did not select any other product components in Step 2, then proceed to Step 9.

5. If Installer locates more than one Express Server home, the Express Server Instance dialog box appears. Select the Express Server instance that you would like to configure as a Financial Analyzer Express Server.

   When you have completed this task, choose **Next.**

   Result: Depending on the installation type or product components you selected you should proceed as follows:

   - If you also selected **AS Portlets Web Listener Files** in Step 2 or you selected the **Single Node** installation type in Step 1, then proceed to Step 6.

- If you did not select any other product components in Step 2, then proceed to Step 9.

6. In the Oracle Apache Server Home dialog box, use the Path box specify the Apache Server Home (the Home for Oracle HTTP Server).

   Note: If Oracle HTTP Server is not already installed, exit from this installation, install Oracle HTTP Server, and then begin this installation again.

   You can type the path into the box, or you can click the **Browse** button to access the Choose Directory dialog box, where you can navigate to the appropriate location.

   When you have completed this task, click **Next**.

   Result: The Oracle Server Information dialog box appears.

7. In the Oracle Server Information dialog box, supply the following information information related to the Oracle server (the server on which the Oracle database resides).

   - TNS Name — Specify the name of the TNS variable (for Unix installations only)

   - Host Name — Specify the host name or IP address for the remote system on which the Oracle database resides.

   - SID — Specify the system ID

   - Port Number — Specify the port number.

   When you have completed this task, click **Next**.

   Result: The AS Portlets User Information dialog box appears.

8. In the AS Portlets User Information dialog box, specify the following infomration:

   - AS User ID — Specify your AS Portlets user ID. This is the user ID for the schema that contains the AS_PORTAL_DATABASE_LIST table, in which you will need to enter information about the databases that you want to make available to users.

   - AS User Password — Specify the password for your AS portlets user ID.

   When you have completed this task, click **Next**.

   Result: The Summary dialog box appears.

9. Review the information in the Summary dialog box to ensure that it is correct; then choose **Install.**

   Result: Installer installs the AS Portlets component. When the installation is complete, the End of Installation dialog box appears.

10. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products or product components.

Related information

For information on setting up and maintaining AS Portlets, refer to Appendix D.

Understanding the Installed Server Directories and Files

Default directory structure

When the installation process is complete, a default directory structure and set of files is set up for each component type. The following default directories are set up beneath the standard root directory for each component type:

- A CODE directory — Contains the code databases for the application.

- A SHARED directory — Contains the shared databases for the application and subdirectories that contain files for Financial Analyzer Web access.

- A TEMPORARY directory — The location for temporary files that are created by the system as it runs.

- A TASKFILE directory — The location for tasks that are created by users and processed by the system.

- A SHELLS directory — Contains a set of EIF files used by the system to create personal databases for user workstations.

- A USERS directory — For the Super administrator installation, contains the Super administrator personal database and a Task Processor personal database. (The Task Processor database is used only if the Task Processor is running in stand-alone mode.) This directory is created as a suggested location for personal databases.

Note: These default directories contain differing combinations of default installation files for each component type.

When Financial Analyzer Web is installed, either as part of a Super administrator or Administrator installation, or when the Web component is installed separately, then

the following default directories are set up in the `express_home\OLAP\OFAxxx` directory where *xxx* represents the current release of Financial Analyzer:

- An `OFAWEB` directory — Contains all of the files needed to run the Web interface.

- An `OFASTART` directory — Contains the `index.html` files for all Web users.

Note: During installation, the Express Server `SERVERDBPATH` parameter, which is used by Financial Analyzer Web, is updated with the path to the Super administrator's `CODE` directory. If you subsequently install one or more administrators that use the same instance of Express Server, the `SERVERDBPATH` parameter will continue to point to the `CODE` directory of the Super administrator, not to that of any newly installed administrator.

Super administrator component

The following table describes the files that are installed into the default directory structure when you install a Super administrator component.

Directory	Installed Files
CODE	ofaserve.db ofatools.db ofaupgr.db ofacdcf.db ofacdcf.cfg The installed files also include a set of language database files. There is one file for each supported language. The file names use the format ofa*xxx*.db, where xxx is a three-character identifier for a specific language.
SHARED	ofas.db ofastask.db ofasctl.db ofaslck.db ofasyscf.db ofasyscf.cfg ofabgrtk.cfg ofaweb.cfg **Note:** If you enable Web access to the Super administrator's shared database through Financial Analyzer, the following file is created in this directory: index.html

Directory	Installed Files
TEMPORARY	Empty
TASKFILE	Empty
SHELLS	insar.eif insbw.eif instpm.eif
USERS	*super_personal*.db *super_personal*.cfg tpm.db tpm.cfg

Administrator component

The following table describes the files that are installed into the default directory structure when you install an Administrator component.

Directory	Installed Files

CODE	`ofaserve.db`
	`ofatools.db`
	`ofaupgr.db`
	`ofacdcf.db`
	`ofacdcf.cfg`
	
	The installed files also include a set of language database files. There is one file for each supported language. The file names use the format `ofaxxx.db`, where xxx is a three-character identifier for a specific language.

SHARED	`ofas.db`
	`ofastask.db`
	`ofsctl.db`
	`ofaslck.db`
	`ofasyscf.db`
	`ofabgrtk.cfg`
	`ofaweb.cfg`
	
	Notes: When you complete this workstation's setup using the Maintain Users feature, the following file is set up in this directory:
	
	`ofasyscf.cfg`
	
	For detailed information about how to complete the workstation setup, refer to the topic "Creating Users" in the Financial Analyzer Help system.
	
	If you enable Web access to the Administrator's shared database through Financial Analyzer, the following file is created in this directory:
	
	`index.html`

TEMPORARY	Empty
TASKFILE	Empty

Directory	Installed Files

SHELLS	`insar.eif`
	`insbw.eif`
	`insdba.eif`
	`instpm.eif`

USERS	Empty
	
	Note: When you complete this workstation's setup using the Maintain Users feature and if you specified this suggested location, the following files are placed in this directory:
	
	`administrator_personal`.db
	`administrator_personal`.cfg
	`tpm.db`
	`tpm.cfg`
	
	For detailed information about how to complete the workstation setup, refer to the topic "Creating Users" in the Financial Analyzer Help system.

Cluster component

The following table describes the files that are installed into the default directory structure when you install a cluster component.

Directory	Installed Files

CODE	`ofaserve.db`
	`ofatools.db`
	`ofaupgr.db`
	`ofacdcf.db`
	`ofacdcf.cfg`
	
	The installed files also include a set of language database files. There is one file for each supported language. The file names use the format `ofaxxx.db`, where xxx is a three-character identifier for a specific language.

SHARED	`ofasyscf.db`
	
	Note: When you complete this workstation's setup using the Maintain Users feature, the following file is set up in this directory:
	
	`ofasyscf.cfg`
	
	For detailed information about how to complete the workstation setup, refer to the topic "Creating Users" in the Financial Analyzer Help system.

Directory	Installed Files
TEMPORARY	Empty
TASKFILE	Empty
SHELLS	`insbw.eif`
USERS	Empty **Note:** When you complete this workstation's setup using the Maintain Users feature and if you specified this suggested location, the following files are placed in this directory: *cluster_wks_personal*.db *cluster_wks_personal*.cfg For detailed information about how to complete the workstation setup, refer to the topic "Creating Users" in the Financial Analyzer Help system.

Installing Financial Analyzer on Client PCs

Client installation options

You have two options for installing Financial Analyzer on client PCs:

- You can install Financial Analyzer as a single-user installation.
- You can install Financial Analyzer as a shared installation.

Important Client Installation Information

If a previous release of the Financial Analyzer client software is already present on the PC where you are installing Financial Analyzer 11*i*, you must uninstall that previous release before installing the new release.

Single-user installations

Description: Single-user installation

In a single-user installation, users install Financial Analyzer directly from the CD-ROM. The single-user installation copies client files to the PC.

Configuration options: Single-user installation

A single-user installation offers two options for client mode: thin client or thick client. For a description of these modes, refer to "Client configuration options" on page 1-21.

Advantages: Single-user installation

A single-user installation offers the following advantages:

- Users are set up individually.
- The installation process is not affected by network traffic.

Shared installations

Description: Shared installation

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

For further information about setting up a shared OLAP home on the network, see "Procedure: Setting up a shared OLAP home on the network" on page 2-28.

Configuration options: Shared installation

A shared installation offers thin client mode and thick client mode. For a description of these modes, refer to "Client configuration options" on page 1-21. There is also a third option: a *thinner* thin client installation, referred to as a "thinner client installation," in which most of the client files are stored on the network rather than on the PC.

Advantages: Shared installation

A shared installation offers the following advantages:

- Users have access to the same standardized software from the network.
- If you choose the thinner client installation, the shared installation installs a minimum number of files on the PC, thereby requiring considerably less disk storage. Most of the client files reside on the server, which can be anywhere on the network.
- A shared installation is easy to update. Updates can be run from the shared OLAP home on the network.

Procedure: Setting up a shared OLAP home on the network

Follow these steps to set up a shared OLAP home as a staging area for a shared installation:

1. Insert the Oracle Financial Analyzer CD-ROM into the drive and run `setup.exe` from the `f:\lan client` directory, where "f" represents your CD-ROM drive.

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

3. In the File Locations dialog box, specify the Oracle Home that you want to use, then choose **Next**.

4. In the Shared OLAP Home Location dialog box, specify the location for the shared OLAP Home on the network. The drive that you specify must be a mapped drive. After you have specified the path information, choose **Next.**

5. In the Summary dialog box, make sure that all of the specifications for the installation are correct, then choose **Install.**

   Installer performs the installation on the network.

6. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

7. Notify your users of the shared OLAP home location on the network that contains the `setup.exe` file that they must run to perform the shared installation on client PCs.

Providing multiple shared installations

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

For each shared installation package that you want to create, follow the procedure in "Procedure: Setting up a shared OLAP home on the network" on page 2-28, with the following stipulations:

- In the File Locations dialog box, you must specify a unique Oracle Home for each shared installation package.

- In the Shared OLAP Home Location dialog box, you must specify a unique shared OLAP Home for each shared installation package.

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

Performing a Single-user Installation on a Client PC

Procedure: Beginning a single-user installation

Follow these steps to begin the installation of Financial Analyzer on a client PC using the client CD-ROM:

1. For a workstation that will access the server in thick client mode, ensure that Personal Express Server has been installed on the workstation.

2. Insert the Financial Analyzer Client CD-ROM into the drive and run `setup.exe` from the `f:\local client` directory, where "f" represents your CD-ROM drive.

3. In the Welcome dialog box, choose **Next**.

4. In the File Locations dialog box under **Destination**, specify the Oracle Home that you want to use, then choose **Next**.

5. The Available Products dialog box appears. This dialog box allows you to choose whether to perform a thin client or thick client installation. Select the desired client mode, then choose **Next**.

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

6. Depending on the client mode that you have chosen to install, do one of the following.

IF you chose the . . .	THEN follow the instructions in . . .
thin client installation,	"Procedure: Completing a thin client single-user installation" on page 2-30
thick client installation,	"Procedure: Completing a thick client single-user installation" on page 2-30

Procedure: Completing a thin client single-user installation

The following procedure describes the additional steps to follow if you are performing a thin client installation.

1. In the Thin Client Installation: Location dialog box, specify the path for the application initialization file (OFA.INI). You can use the default path, you can use the **Browse** button to choose a different path, or you can type a path name. After you have specified the path information, choose **Next.**

2. In the Thin Client Installation: Sever Type dialog box, select the operating system for the server where the personal database is to run, then choose **Next.**

3. In the Summary dialog box, make sure that all of the specifications for the installation are correct, then choose **Install.**

   Installer installs the products that you have selected.

4. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Procedure: Completing a thick client single-user installation

The following procedure describes the additional steps to follow if you are performing a thick client installation.

1. In the Thick Client Installation: Location dialog box, specify the path for the location of the Budget workstation personal database file. You can use the default path, you can use the **Browse** button to choose a different path, or you can type a path name. After you have specified the path information, choose **Next.**

2. In the Thick Client Installation: Shared Database Information dialog box, specify the following information for the shared database that the Budget workstation is to access on the server.

   - The path for the shared database

   - The server name

   - The Express Server port number

   After you have specified the above information, choose **Next.**

3. In the Thick Client Installation: Server Type dialog box, select the operating system for the server where Express Server is running.

4. In the Summary dialog box, make sure that all of the specifications for the installation are correct, then choose **Install.**

   Installer installs the products that you have selected.

5. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Performing a Shared Installation on a Client PC

Procedure: Beginning a shared installation

Follow these steps to begin the installation of Financial Analyzer on a client PC from a staging area on the network:

1. For a workstation that will access the server in thick client mode, ensure that Personal Express Server has been installed on the workstation.

2. Run the the setup.exe file that performs the shared installation, as instructed by your database administrator. The setup.exe file is located in the shared OLAP home on the network.

   Note: The shared OLAP home is the area on the network in which the staging area for the shared installation has been established, as described in .

3. In the Welcome dialog box, choose **Next**.

4. In the File Locations dialog box under **Destination**, specify the Oracle Home that you want to use, then choose **Next**.

5. The Available Products dialog box appears. This dialog box allows you to choose whether to perform a thinner client, thin client, or thick client installation. Select the desired client mode, then choose **Next**.

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

6. Depending on the client mode that you have chosen to install, do one of the following.

IF you chose the . . .	THEN follow the instructions in . . .
thinner client installation,	"Procedure: Completing a thinner client shared installation" on page 2-32
thin client installation,	"Procedure: Completing a thin client shared installation" on page 2-32
thick client installation,	"Procedure: Completing a thick client shared installation" on page 2-33

Procedure: Completing a thinner client shared installation

The following procedure describes the additional steps to follow if you are performing a thinner client installation.

1. In the Thinner Client Installation: Location dialog box, specify the path for the application initialization file (OFA.INI). You can use the default path, you can use the **Browse** button to choose a different path, or you can type a path name. After you have specified the path information, choose **Next.**

2. In the Thin Client Installation: Server Type dialog box, select the operating system for the server where the personal database is to run, then choose **Next.**

3. In the Summary dialog box, make sure that all of the specifications for the installation are correct, then choose **Install.**

   Installer installs the products that you have selected.

4. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Procedure: Completing a thin client shared installation

The following procedure describes the additional steps to follow if you are performing a thin client installation.

1. In the Thin Client Installation: Location dialog box, specify the path for the application initialization file (OFA.INI). You can use the default path, you can use the **Browse** button to choose a different path, or you can type a path name. After you have specified the path information, choose **Next.**

2. In the Thin Client Installation: Server Type dialog box, select the operating system for the server where the personal database is to run, then choose **Next.**

3. In the Summary dialog box, make sure that all of the specifications for the installation are correct, then choose **Install.**

   Installer installs the products that you have selected.

4. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Procedure: Completing a thick client shared installation

The following procedure describes the additional steps to follow if you are performing a thick client installation.

1. In the Thick Client Installation: Location dialog box, specify the path for the location of the Budget workstation personal database file. You can use the default path, you can use the **Browse** button to choose a different path, or you can type a path name. After you have specified the path information, choose **Next.**

2. In the Thick Client Installation: Shared Database Information dialog box, specify the following information for the shared database that the Budget workstation is to access on the server.

   ■ The path for the shared database

   ■ The server name

   ■ The Express port number

   After you have specified the above information, choose **Next.**

3. In the Thick Client Installation: Server Type dialog box, select the operating system for the server where Express Server is running.

4. In the Summary dialog box, make sure that all of the specifications for the installation are correct, then choose **Install.**

   Installer installs the products that you have selected.

5. In the End of Installation dialog box, choose **Exit** to close Installer or choose **Next Install** to install additional Oracle products.

Understanding the Installed Client Directories and Files

Thick client component

For a thick client installation, the following files are located in the `oracle_home\OLAP\OFAxxx\thickclient` directory (where *xxx* represents the current release of Financial Analyzer):

```
ofaserve.db
ofatools.db
ofaupgr.db
ofacdcf.db
ofacdcf.cfg
```

This directory also contains the Financial Analyzer application files.

The installed files also include a set of language database files. There is one file for each supported language. The file names use the format `ofaxxx.db`, where xxx is a three-character identifier for a specific language.

In addition, a thick client installation also includes the following directory:

```
oracle_home\OLAP\OFAxxx\thickclient\user
```

where:

- *xxx* represents the current release of Financial Analyzer and
- *user* is a directory name specified during the installation procedure.

The `oracle_home\OLAP\OFAxxx\thickclient\user` directory contains the following files:

```
personal_database.db
personal_database.cfg
ofasyscf.db
ofasyscf.cfg
ofa.ini
```

Thin client component

In a thin client installation, the following directory is created:

```
oracle_home\OLAP\OFAxxx\thinclient\user
```

where:

- *xxx* represents the current release of Financial Analyzer and
- *user* is the name of the directory on the PC for the application initialization file (`ofa.ini`), as specified during the installation procedure.

Thinner client component

In a thinner client installation, the following directory is created:

```
oracle_home\OLAP\OFAxxx\thinnerclient\user
```

where:

- *xxx* represents the current release of SNAPI and
- *user* is the name of the directory on the PC for the application initialization file (`ofa.ini`), as specified during the installation procedure.

Refer to the current *Oracle Financial Analyzer 11i Release Note*s for the correct software release information.

Additional client component information

The Financial Analyzer client installation process will also install SNAPI (Structured N-Dimensional API) in the following directory:

```
oracle_home/OLAP/OSNxxxx/
```

where *xxx* represents the current release of SNAPI.

This directory contains SNAPI files, which provide the application programming interface between the Financial Analyzer client component and the personal database using Express Server or Personal Express.

Setting Directory and File Access

Introduction

This topic explains how to set up the correct type of access to the installed directories and files, so that users have access to the information that they need.

Setting up rights access for NT servers

All users who need to connect to an NT server running Financial Analyzer must have the `Log on locally` right assigned to their network account. For more information about the `Log on locally` right, refer to the *Express Installation and Configuration Guide.*

Setting up access to directories

The following table provides information about the type of access that all users need to the directories that are set up during the installation process.

Directory	Type of Access Required	
CODE	Read-Only	
TEMPORARY	Read/Write	
TASKFILE	Read/Write	
SHELLS	Read-Only	
personal_database	Read/Write	
SHARED:	**Administrator and Task Processor**	**All Other Users**
OFAS	Read/Write	Read-Only
OFASTASK	Read/Write	Read/Write
OFASCTL	Read/Write	Read-Only
OFASLCK	Read/Write	Read-Only
OFASYSCF	Read/Write	Read-Only

Important: At installation time, when using the Manage User feature to set up users' workstations, administrators need full access to directories into which they will install users' personal databases.

Note: Databases that are created through Express Server have the same file access rights that are specified in Express. On Unix servers, to change file access rights of databases that are created through Express, you must use the `acls` command. Do not use the `chmod` command on these files.

Financial Analyzer Database Security

Shared Database

Access to a Financial Analyzer shared database ofas.db is controlled through the PERMIT_READ and PERMIT_WRITE functions of the Express Server PERMIT command.

To attach the shared database in read/write mode the connection to Express Server must be made using an operating system username that is associated with the Financial Analyzer Administrator workstation user for that shared database. Once attached in read/write mode, all the objects in the database are available to the user.

When you attach the shared database read-only the connection to Express Server must be made using an operating system username associated with a valid Financial Analyzer user who is defined by the Administrator for that shared database. The user will only be able to access the dimensions, dimension values, financial data items, hierarchies, and attributes that have been distributed to that Financial Analyzer user connected with that operating system username. If the operating system username is associated with more than one Financial Analyzer user then the database objects available to the user will be those distributed to the first instance of that Financial Analyzer user in the list of users.

Workstation personal database

Access to a workstation's personal database is controlled by the operating system username entered in the Connect to EXPRESS Session dialog box when starting Financial Analyzer. The operating system username must be associated with a Financial Analyzer user.

For detailed information about associating operating system usernames with Financial Analyzer users, refer to the topic "Creating Users" in the Financial Analyzer Help system.

Configuring Financial Analyzer for Web Access

Overview of configuration procedure

Follow these general steps to configure Financial Analyzer for Web access:

1. Ensure that you have installed all the necessary components that are required to run Financial Analyzer through the Web. These include:

- Express Web Agent
- Web listener software (Oracle Web Application Server is recommended)

2. Enable Web Agent security in Oracle Express Instance Manager, as described in "Procedure: Enabling Web Agent security" on page 2-38.

3. Modify the Web listener, as described in "Procedure: Adding virtual directories to the Web listener" on page 2-39.

4. Provide the URL for the shared database to the users who need Web access to that database, as described in "Providing the URL for a shared database to users" on page 2-39. By specifying this URL in their browsers, users will be able to see everything that the administrator has distributed to them.

Procedure: Enabling Web Agent security

Follow these steps to enable Web Agent security:

1. Start Oracle Express Instance Manager.

2. In the Web Agent tab, set the following setting:

   ```
   WebAuthenticationType=BASIC
   ```

   or

   ```
   WebAuthenticationType=FORM
   ```

   Leave all other settings as the default.

3. Choose **Set.**

4. In the Security tab, set the following setting:

   ```
   RequirePasswordEncryption=NO
   ```

   Leave all other settings as the default.

5. Choose **Set.**

6. Choose **OK.**

Note: After you complete the above procedure, you must restart Express Server to enable Web Agent security.

Procedure: Adding virtual directories to the Web listener

Follow these steps to modify the Web listener.

1. Start your Web browser.

2. Add the mappings for the two virtual directories that you noted from the End of Installation dialog box in the Super administrator and Administrator component installations into your Web listener.

   Important: You can change the name of the `ofastart` directory, but you cannot change the name of the `ofaweb` directory.

   Notes: If you an enabling more than one shared database for Web access with one Web listener you will need to specify unique `ofastart` virtual directories for each shared database.

   Unix is case sensitive, so you must use the correct case when you enter the virtual directories. NT is not case sensitive.

   The `virtdirs.txt` text file describes the virtual directory structures that you must create. It is located in the `ofaweb` directory on the Web Agent server.

3. Restart the Web listener. If you are using Oracle Web Server, you must restart the Web listener whenever you modify it.

   The Web listener checks that the directories that you entered exist. If any directories are not present, you receive an error message.

   Important: If you move or delete any of the files or directories on the server that are referenced in the Web listener directory mappings, you must update the mappings to refer to the new locations.

Providing the URL for a shared database to users

To complete the configuration of Financial Analyzer for Web access, provide users who are to have Web access to a shared database with a URL that consists of the name of the Web server and the name of the virtual directory for the shared database (`ofastart`).

For example, assume that the name of the Web server is `servername`. Users can access the shared database on the Web by specifying the following URL in their browsers:

```
http://servername/ofastart
```

Notify your users that they must accept cookies if they are prompted to do so. Also alert them that the Netscape browser will prompt them to download Java classes

the first time that they access Financial Analyzer on the Web. If they have chosen Smart Update, they will be asked to specify a location for downloading these files.

Implementing Single Sign-on

About Single Sign-On

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

Implementing Single Sign-On assumes that you have performed several preliminary installation and setup tasks.

Note: This feature is available only for Financial Analyzer Web users.

Requirements for implementing Single Sign-On

Install the Application Object Library (AOL) patch

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

Install Single Sign-On

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

Set up users and responsibilities in Oracle Applications

You must define each Financial Analyzer Web user in Oracle Applications and assign user responsibilities. You can associate a user with one or more of the following responsibilities:

- OFA Administrator

- OFA Budget

- OFA Analyst

- OFA External

Set up system profiles in Oracle Applications

You must also set up the following system profiles in Oracle Applications:

- **OFA Server Profile** —The Web listener host and, optionally, its port number, in the format host_name[:port]

- **OFA Web Agent profile** — The name and virtual path of your Single Sign-On Web Agent CGI program.

- **OFA Express Access Descriptor profile** — The service name of the instance to which you will connect.

- **OFA Installation Path profile** — The path to your Financial Analyzer root directory.

Set Up the Single Sign-On Web Agent in Express

To ensure that Single Sign-On users can connect to a Financial Analyzer session, in the Express Instance Manager, you must set the following properties to a value of **None:**

- Required Security Level

- Required Authentication Level

- Web Agent Web Authentication Type

Ongoing task: Import users into Financial Analyzer from Oracle Applications

As you create new users, you must import their user names from Oracle Applications. For details, refer to the topic called "Creating Users" in the Financial Analyzer Help system.

Configuring the Task Processor to Run in the Background

Overview

You can configure the Task Processor so that it runs as a background task on the server. When configured to run as a background task the Task Processor is not reliant on the Administrator or Task Processor workstation interface. When you use the background method you can control the Task Processor from outside of Financial Analyzer.

Procedure: Configuring the Task Processor to run in the background

Use the following procedure to configure the Task Processor to run in the background. Follow this procedure for each instance of Express Server for which you want to run a Task Processor in the background.

1. Start Oracle Express Instance Manager.

2. Select the Session tab.

3. In the Category box, select **Initial Session,** then specify the following settings:

    ```
    ShutDownSPLScript=oecnn/taskstop.inf
    SPLScriptLogging=NO
    StartupSPLScript=oecnn/taskini.inf
    WakeupMilliseconds=30000
    WakeupSPLScript=oecnn/taskrun.inf
    ```

    Note: The WakeupMilliseconds setting determines how often the server checks whether the `tkstop.flg` file is present in the `taskfile` directory. Oracle Corporation recommends a setting of 30000 milliseconds, which is equal to 10 seconds.

4. Choose **Set**.

5. Choose **OK**.

6. In the Express Server Client Support File directory, open the file `tkserver.ini` and add the location and name of the Task Processor initialization file (`ofabgrtk.cfg`) for each Administrator.

    Example:

    `oracle_home/olap/super/shared/ofabgrtk.cfg`

    or

    `oracle_home/olap/subdba/shared/ofabgrtk.cfg`

    Note: On NT, you must use forward slashes for drive paths.

7. Access the Administrator workstation and add the Persistent Session Initialize username as a valid administrator user.

    Notes: The default values for the Initialize user name are:

    ■   For the NT operating system: OESinit

    ■   For Unix operating system: oesinit

8. Run the Task Processor in the foreground to process the username change.

9. Ensure that the Persistent Session Initialize user name has write access to the Financial Analyzer shared directory.

10. Restart Express Server to activate these new settings.

   Once Express Server has been restarted, the Task Processor will initialize on the server in the background. Therefore, anything sent to the Task Processor in Financial Analyzer will be processed immediately.

Using the Task Processor directly on the server

You can start the Task Processor directly on the server by renaming or removing the `tkstop.flg` file in the `taskfile` directory. To stop the Task Processor directly on the server, put the `tkstop.flg` file back in place in the `taskfile` directory.

Related information

For information about running the Task Processor, refer to the topic "Running the Task Processor in Background Mode," in the Financial Analyzer Help system.

Starting Financial Analyzer for the First Time

Verifying the installation

A successful client installation creates an Oracle for Windows program group on the PC. To verify the installation, you start up the workstation by running Financial Analyzer from this program group. The Connect to EXPRESS Session dialog box appears, allowing you to connect to an Express Server session to start Financial Analyzer.

Note: When you log in for the first time, you must specify information that enables the user to connect to an Express Server session. This information is retained by the system. Only the password is needed to log into subsequent sessions.

Procedure: Logging into Express Server

Use the following procedure to log into Express Server.

1. Double-click on the Financial Analyzer icon.

2. Complete the fields as follows.

   - Username — Enter the workstation user's username for the operating system on which Express Server is running.

   - Password — Enter the user's password for the operating system on which Express Server is running.

   - Domain — If the user's workstation is connecting into an Express Server instance running on an NT domain server, enter the domain name.

   - Name — Enter the name of the user's personal database.

     Note: For certain installations, this information appears automatically.

   - Path — Enter the full path of the user's personal database.

     Important: When running on an NT server, you must use server drive letters rather than UNCs.

   - Server — Enter the name or IP address of the server where the instance of Express Server to which this workstation will connect is installed.

     Note: If the user's workstation is running as a thick client, you can leave this field blank.

   - EndPoint or UUID — If the Express Server instance is running on Unix, specify its EndPoint.

     If multiple instances of Express Server are running on an NT server, identify the Express Server instance to which this workstation will connect by entering its unique universal identifier (UUID).

3. Choose **OK**.

   If you are logging in on any type of workstation other than a Super administrator workstation, the Financial Analyzer main screen now appears.

   If you are logging in on a Super administrator workstation, you must complete these additional steps:

   a. You will be asked to select a language. The language that you select will be the system-wide language for entering object descriptions into Financial Analyzer. Select the desired language, then choose **OK.**

b. You will be asked to verify the language that you selected. Make sure that the selected language is the correct one, then choose **Yes.**

The Financial Analyzer main screen now appears.

3

Upgrading from a Previous Version

Chapter summary

This chapter describes how to upgrade from Financial Analyzer 6.0.1.*x* to Financial Analyzer 11i and from Financial Analyzer 6.2.*x* and higher to the current release of Financial Analyzer 11*i*.

List of topics

This chapter includes the following topics:

- Upgrading Financial Analyzer 6.0.1.x to Financial Analyzer 11i
- Upgrading Financial Analyzer 6.2 and Higher to the Current Release of Financial Analyzer 11i

Upgrading Financial Analyzer 6.0.1.*x* to Financial Analyzer 11*i*

Directory structures

Both Financial Analyzer release 6.0.1.*x* and release 11*i* use a standard directory structure for the CODE, SHARED, TASKFILE, TEMPORARY, and SHELLS directories for Super administrator and Administrator workstations, and for cluster configurations. It is recommended that you conform to this standard structure, because features in future releases will be based on it.

The Financial Analyzer 11*i* client component will be installed into a different directory than the directory that was used for Financial Analyzer 6.0.1.*x* off of your Oracle home directory.

Upgrade requirements

Before you upgrade your system, be sure to perform the following tasks:

- Back up your existing Financial Analyzer system.

- Run the Task Processor to ensure that all processes have been completed.

- Ensure that the correct release of Express Server is installed on all appropriate servers. Refer to the current *Oracle Financial Analyzer 11i Release Note*s for release information.

- For thick client workstations, ensure that the correct release of Personal Express Sever is installed on the client PC. Refer to the current *Oracle Financial Analyzer 11i Release Note*s for release information.

Upgrade sequence

The upgrade process must be completed in the order listed here to upgrade Financial Analyzer properly. You will follow a top-down order.

1. Upgrade the Super administrator workstation.
2. Upgrade workstations reporting to the Super administrator.
3. Upgrade the Administrator workstations.
4. Upgrade workstations reporting to subordinate administrators.

Procedure: Upgrading the Super administrator workstation

Follow these steps to upgrade a Super administrator workstation:

1. Remove (deselect) the Read-only attribute for all code database files that correspond to this workstation. See "Understanding the Installed Server Directories and Files" on page 2-21 for a list of the code database files; these are the files listed in the CODE directory that have .db file extensions.

2. Use Installer to install the server component of 11*i* in the same location as 6.0.1.*x*. When you are prompted for the name of the Super administrator personal database, use the same database name that was used in 6.0.1.*x*.

   Note: The existing personal and shared databases will *not* be overwritten.

3. Install the new 11*i* client component of the Super administrator workstation.

4. Start the Super administrator workstation from the newly created icon to upgrade the personal database and shared component.

5. Select **Users** from the Manage menu and select the Super administrator workstation user. The operating system username used to start up the Super administrator workstation for the first time is associated with the Super administrator workstation user.

   If more than one operating system user needs access to the Super administrator workstation, associate each operating system username with the Super administrator workstation user as necessary.

   Refer to "Creating Users" in the Financial Analyzer Help system for information on associating an operating system username with a Financial Analyzer user.

6. For every other Financial Analyzer user managed by the Super administrator, associate the appropriate operating system usernames.

   Refer to "Creating Users" in the Financial Analyzer Help system for information on associating an operating system username with a Financial Analyzer user.

7. Run the Task Processor to update the user task.

Procedure: Upgrading an Administrator workstation

Follow these steps to upgrade an Administrator workstation:

1. Remove (deselect) the Read-only attribute for all code database files that correspond to this workstation. See "Understanding the Installed Server Directories and Files" on page 2-21 for a list of the code database files; these are the files listed in the CODE directory that have .db file extensions.

2. Use Installer to install the server component of 11*i* in the same location as 6.0.1.*x*.

3. If the 6.0.1.*x* installation used UNC pathing, edit the [SUPER] section of the system configuration file to specify the appropriate path information (UNC pathing is not supported in 11*i*.).

   For detailed information about configuration files, see Chapter 4.

4. Install the new 11*i* client component of the Administrator workstation.

5. Start the Administrator workstation from the newly created icon to upgrade the personal database and shared component.

   Note: After the upgrade, but before the workstation starts, you might receive the message "You are not a valid Financial Analyzer user." This could mean

that the superior Administrator (the Administrator workstation that administers the workstation that you are upgrading) has not associated your operating system username with your workstation. To resolve this issue, start the superior Administrator workstation, associate appropriate operating system usernames for the Administrator workstation you are upgrading and for every other Financial Analyzer user managed by the superior Administrator, and run the task processor. After the task completes, you can start the upgraded workstation.

6. Select **Users** from the Manage menu and select the Administrator workstation user. The operating system username used to start up the Administrator workstation for the first time is associated with the Administrator workstation user.

   If more than one operating system user needs access to the Administrator workstation, associate each operating system username with the Administrator workstation user as necessary.

   Note: The usernames associated with the Administrator's own workstation are not automatically allowed access to the superior environment. Only the superior Administrator can control access to the superior tier.

   Refer to "Creating Users" in the Financial Analyzer Help system for information on associating an operating system username with a Financial Analyzer user.

7. For every other Financial Analyzer user managed by the Administrator, associate the appropriate operating system usernames.

   Refer to "Creating Users" in the Financial Analyzer Help system for information on associating an operating system username with a Financial Analyzer user.

8. Run the Task Processor to process the user update task.

Procedures: Upgrading Budget workstations

Follow these steps to upgrade a Budget workstation, depending on how it is configured.

Upgrading a thin client Budget workstation

Follow these steps to upgrade a thin client Budget workstation:

1. Install the new 11*i* thin client component for the Budget workstation.

2. If the 6.0.1.*x* installation used UNC pathing, edit the personal configuration file associated with the workstation and change the OFASYSCFGPATH setting to specify the appropriate path information (UNC pathing is not supported in 11*i*).

   For detailed information about configuration files, see Chapter 4.

3. Start the Budget workstation from the newly created icon to upgrade the personal database.

   Note: After the upgrade, but before the workstation starts, you might receive the message "You are not a valid Financial Analyzer user." This could mean that the Administrator has not associated your operating system username with your workstation. To resolve this issue, start the Administrator workstation, associate appropriate operating system usernames for the Budget workstation you are upgrading and for every other Financial Analyzer user managed by the Administrator, and run the task processor. After the task completes, you can start the upgraded workstation.

Upgrading a thick client Budget workstation

Follow these steps to upgrade a thick client Budget workstation:

1. Use Installer to install the thick client component of 11*i* for the Budget workstation. When you are prompted for the name of the personal database, use the same database name that was used in 6.0.1.*x*.

2. Move the personal database from the existing thick client directory into the newly installed one.

3. Start the thick client Budget workstation from the newly created icon to upgrade the personal database.

   Note: After the upgrade, but before the workstation starts, you might receive the message "You are not a valid Financial Analyzer user." This could mean that the Administrator has not associated your operating system username with your workstation. To resolve this issue, start the Administrator workstation, associate appropriate operating system usernames for the Budget workstation you are upgrading and for every other Financial Analyzer user managed by the Administrator, and run the task processor. After the task completes, you can start the upgraded workstation.

Upgrading a thin client Budget workstation that is part of a cluster

Follow these steps to upgrade a thin client Budget workstation that is part of a cluster:

1. Use Installer to install a new cluster component of 11*i* on the server in the same location where the 6.0.1.*x* cluster component was installed.

2. If the 6.0.1.*x* installation used UNC pathing, edit the personal configuration file associated with the workstation and change the OFASYSCFGPATH setting to specify the appropriate path information (UNC pathing is not supported in 6.3).

   For detailed information about configuration files, see Chapter 4.

3. Install the new 11*i* thin client component for the Budget workstation.

4. Start the Budget workstation from the newly created icon to upgrade the personal database.

   Note: After the upgrade, but before the workstation starts, you might receive the message "You are not a valid Financial Analyzer user." This could mean that the Administrator has not associated your operating system username with your workstation. To resolve this issue, start the Administrator workstation, associate appropriate operating system usernames for the Budget workstation you are upgrading and for every other Financial Analyzer user managed by the Administrator, and run the task processor. After the task completes, you can start the upgraded workstation.

Procedure: Upgrading an Analyst workstation

Follow these steps to upgrade an Analyst workstation:

1. Install the new 11*i* thin client component for the Analyst workstation.

2. If the 6.0.1.*x* installation used UNC pathing, edit the personal configuration file associated with the workstation and change the OFASYSCFGPATH setting to specify the appropriate path information (UNC pathing is not supported in 11*i*.).

   For detailed information about configuration files, see Chapter 4.

3. Start the Analyst workstation from the newly created icon to upgrade the personal database.

   Note: After the upgrade, but before the workstation starts, you might receive the message "You are not a valid Financial Analyzer user." This could mean that the Administrator has not associated your operating system username with

your workstation. To resolve this issue, start the Administrator workstation, associate appropriate operating system usernames for the Analyst workstation you are upgrading and for every other Financial Analyzer user managed by the Administrator, and run the task processor. After the task completes, you can start the upgraded workstation.

Upgrade tasks for Oracle General Ledger users

Financial Analyzer users who use the Oracle General Ledger integration module must perform the following tasks after completing the upgrade:

1. Run the segment value extraction program in General Ledger.

2. Run the calendar extraction program in General Ledger for each year of the accounting calendar present in Financial Analyzer.

3. Use the Submit Load feature in Financial Analyzer to load financial data.

4. After the load task has run successfully, the Super administrator must refresh structure to the personal database.

Upgrading Financial Analyzer 6.2 and Higher to the Current Release of Financial Analyzer 11*i*

Directory structures

Both Financial Analyzer release 11*i* and releases 6.2*x* use a standard directory structure for the CODE, SHARED, TASKFILE, TEMPORARY, and SHELLS directories for Super administrator and Administrator workstations, and for cluster configurations. It is recommended that you conform to this standard structure, because features in future releases will be based on it.

The Financial Analyzer 11*i* client component will be installed into a different directory than the directory that was used for Financial Analyzer 6.2.*x* off of your Oracle home directory.

Upgrade requirements

Before you upgrade your system, be sure to perform the following tasks:

■ Back up your existing Financial Analyzer system.

■ Run the Task Processor to ensure that all processes have been completed.

- Ensure that the correct release of Express Server is installed on all appropriate servers. Refer to the current *Oracle Financial Analyzer 11i Release Note*s for release information.

- For thick client workstations, ensure that the correct release of Personal Express Server is installed on the client PC. Refer to the current *Oracle Financial Analyzer 11i Release Note*s for release information.

- Uninstall all Financial Analyzer and Sales Analyzer 6.2.*x* client components.

Upgrade sequence

The upgrade process must be completed in the order listed here to upgrade Financial Analyzer properly. You will follow a top-down order.

1. Upgrade the Super administrator workstation.

2. Upgrade workstations reporting to the Super administrator.

3. Upgrade the Administrator workstations.

4. Upgrade workstations reporting to subordinate administrators.

Procedure: Upgrading the Super administrator workstation

Follow these steps to upgrade a Super administrator workstation:

1. Remove (deselect) the Read-only attribute for all code database files that correspond to this workstation. See "Understanding the Installed Server Directories and Files" on page 2-21 for a list of the code database files; these are the files listed in the CODE directory that have .db file extensions.

2. Use Installer to install the server component of 11*i* in the same location as 6.2.*x*. When you are prompted for the name of the Super administrator personal database, use the same database name that was used in 6.2.*x*.

   Note: The existing personal and shared databases will *not* be overwritten.

3. Install the new 11*i* client component of the Super administrator workstation.

4. Start the Super administrator workstation from the newly created icon to upgrade the personal database and shared component.

Procedure: Upgrading an Administrator workstation

Follow these steps to upgrade an Administrator workstation:

1. Remove (deselect) the Read-only attribute for all code database files that correspond to this workstation. See "Understanding the Installed Server Directories and Files" on page 2-21 for a list of the code database files; these are the files listed in the CODE directory that have .db file extensions.

2. Use Installer to install the server component of 11*i* in the same location as 6.2.*x*.

3. If you are upgrading a 6.2 installation that used UNC pathing, edit the [SUPER] section of the system configuration file to specify the appropriate path information (UNC pathing is not supported in 11*i*).

   For detailed information about configuration files, see Chapter 4.

4. Install the new 11*i* client component of the Administrator workstation.

5. Start the Administrator workstation from the newly created icon to upgrade the personal database and shared component.

Procedures: Upgrading Budget workstations

The following procedures describe the steps you follow to upgrade a Budget workstation, depending on how it is configured.

Upgrading a thin client Budget workstation

Follow these steps to upgrade a thin client Budget workstation:

1. Install the new 11*i* thin client component for the Budget workstation.

2. If you are upgrading a 6.2 installation that used UNC pathing, edit the personal configuration file associated with the workstation and change the OFASYSCFGPATH setting to specify the appropriate path information (UNC pathing is not supported in 11*i*).

   For detailed information about configuration files, see Chapter 4.

3. Start the Budget workstation from the newly created icon to upgrade the personal database.

Upgrading a thick client Budget workstation

Follow these steps to upgrade a thick client Budget workstation:

1. Use Installer to install the thick client component of 11*i* for the Budget workstation. When you are prompted for the name of the personal database, use the same database name that was used in 6.2.*x*.

2. Move the personal database from the existing thick client directory into the newly installed one.

3. Start the thick client Budget workstation from the newly created icon to upgrade the personal database.

Upgrading a thin client Budget workstation that is part of a cluster

Follow these steps to upgrade a thin client Budget workstation that is part of a cluster:

1. Use Installer to install a new cluster component of 11*i* on the server in the same location where the 6.2.*x* cluster component was installed.

2. If you are upgrading a 6.2 installation that used UNC pathing, edit the personal configuration file associated with the workstation and change the OFASYSCFGPATH setting to specify the appropriate path information (UNC pathing is not supported in 11*i*).

   For detailed information about configuration files, see Chapter 4.

3. Install the new 11*i* thin client component for the Budget workstation.

4. Start the Budget workstation from the newly created icon to upgrade the personal database.

Procedure: Upgrading an Analyst workstation

Follow these steps to upgrade an Analyst workstation:

1. Install the new 11*i* thin client component for the Analyst workstation.

2. If you are upgrading a 6.2 installation that used UNC pathing, edit the personal configuration file associated with the workstation and change the OFASYSCFGPATH setting to specify the appropriate path information (UNC pathing is not supported in 11*i*).

   For detailed information about configuration files, see Chapter 4.

3. Start the Analyst workstation from the newly created icon to upgrade the personal database.

4

Working with Configuration Files

Chapter summary

This chapter describes a set of configuration files that are installed as part of the Financial Analyzer software. You may need to create or edit one or more of these files as part of installing and configuring a particular type of workstation.

List of topics

This chapter includes the following topics:

Purpose and Types of Configuration Files

Purpose of configuration files

The Financial Analyzer configuration files control system communication in the following ways:

- They control how workstations communicate with their associated shared and code databases.

- They control how Administrator workstations communicate with superior or subordinate administrators.

Types of configuration files

The following configuration files will be discussed in this chapter:

- System configuration file: `ofasyscf.cfg`

- Code configuration file: `ofacdcf.cfg`

- Personal configuration file: `personal_database_name.cfg`

System Configuration File

Introduction

The system configuration file (`ofasyscf.cfg`) contains information that is used to populate the `ofasyscf.db` database at run time. The file contains three sections, which specify the following information:

- The location of the shared database associated with a workstation

- The location of the superior administrator's shared database

- The location of the `CODE`, `TEMPORARY`, and `TASKFILE` directories.

File locations

The system configuration file can be installed into the following locations:

- The `SHARED` directory of a Super administrator workstation

- The `SHARED` directory of an Administrator workstation

- The `SHARED` directory of a cluster

- The personal directory of a thick-client workstation

File contents

The system configuration file contains the following settings. These settings require different information to be entered depending on the file's location in your system.

The location of the file in your system indicates the type of workstation or configuration that is using the information in the file.

Setting	Required Information
[Shared]	
SHAREDACCESS	DIRECT (if the shared databases are on the same server as the workstations using this configuration file) *or* REMOTE (if the shared databases are on a different server as the workstations using this configuration file)
SHAREDCFGPATH	path of the shared configuration file or shared databases
SHAREDHOST	name of the server where the instance of Express Server associated with the shared databases is running
SHAREDPORT	the XCA port number for the instance of Express Server associated with the shared databases
SHAREDHOSTTYPE	NT *or* UNIX (the server type on which the shared databases are located)
[Super]	
SUPERACCESS	DIRECT (if the superior administrator's shared databases are on the same server as the subordinate administrator's shared databases) *or* REMOTE (if the superior administrator's shared databases are on a different server from the subordinate administrators shared databases)
SUPERCFGPATH	path of the superior administrator's shared configuration file
SUPERHOST	name of the server where the instance of Express Server associated with the superior administrator's shared databases is running
SUPERPORT	the XCA port number for the instance of Express Server associated with the shared databases of the superior administrator
SUPERHOSTTYPE	NT *or* UNIX (The server type on which the shared databases of the superior administrator are located)
[Path]	
CODECFGPATH	path of the code configuration file

Setting	Required Information
TMPFILEPATH	path of the TEMPORARY directory
TASKFILEPATH	path of the Task Processor file directory

Specifications for the ofasyscf.cfg file in the SHARED directory of a Super administrator workstation

Specify the following settings for the system configuration file located in the SHARED directory of a Super administrator workstation.

Setting	Required Information
[Shared]	
SHAREDACCESS	DIRECT
SHAREDCFGPATH	path of the shared directory of the Super administrator
SHAREDHOST	name of the server where the instance of Express Server associated with the shared databases of the Super administrator is running
SHAREDPORT	XCA port number for the instance of Express Server associated with the Super administrators shared databases
SHAREDHOSTTYPE	the server type on which the shared databases of the Super administrator are located
[Super]	
SUPERACCESS	
SUPERCFGPATH	
SUPERHOST	
SUPERPORT	
SUPERHOSTTYPE	
[Path]	
CODECFGPATH	path of the CODE directory of the Super administrator
TMPFILEPATH	path of the TEMPORARY directory of the Super administrator
TASKFILEPATH	path of the TASKFILE directory of the Super administrator

Specifications for the ofasyscf.cfg file in the SHARED directory of an Administrator workstation

Specify the following settings for the system configuration file located in the SHARED directory of an Administrator workstation.

Setting	Required Information
[Shared]	
SHAREDACCESS	DIRECT
SHAREDCFGPATH	path of the shared directory of the Administrator
SHAREDHOST	name of the server where the instance of Express Server associated with the shared databases of the Administrator is running
SHAREDPORT	XCA port number for the instance of Express Server associated with the administrator's shared databases
SHAREDHOSTTYPE	the server type on which the shared databases of the administrator are located
[Super]	
SUPERACCESS	DIRECT *or* REMOTE
SUPERCFGPATH	path of the SHARED directory of the superior administrator
SUPERHOST	name of the server where the instance of Express Server associated with the shared databases of the superior administrator is running
SUPERPORT	XCA port number for the instance of Express Server associated with the superior administrator's shared databases
SUPERHOSTTYPE	the server type on which the shared databases of the superior administrator are located
[Path]	
CODECFGPATH	path of the CODE directory of the Administrator
TMPFILEPATH	path of the TEMPORARY directory of the Administrator
TASKFILEPATH	path of the TASKFILE directory of the Administrator

Specifications for the ofasyscf.cfg file in the SHARED directory of a cluster

Specify the following settings for the system configuration file located in the SHARED directory of a cluster.

Setting	Required Information
[Shared]	
SHAREDACCESS	REMOTE
SHAREDCFGPATH	path of the shared directory of the Administrator into which the cluster reports
SHAREDHOST	name of the server where the instance of Express Server associated with the shared databases of the Administrator into which the cluster reports is running
SHAREDPORT	XCA port number for the instance of Express Server associated with the shared databases of the administrator into which the cluster reports
SHAREDHOSTTYPE	the server type on which the shared databases of the Administrator into which the cluster reports are located
[Super]	
SUPERACCESS	
SUPERCFGPATH	
SUPERHOST	
SUPERPORT	
SUPERHOSTTYPE	
[Path]	
CODECFGPATH	path of the CODE directory of the cluster workstations
TMPFILEPATH	path of the TEMPORARY directory of the cluster workstations
TASKFILEPATH	

Specifications for the ofasyscf.cfg file in the personal directory of a thick-client workstation

Specify the following settings for the system configuration file located in the personal directory of a thick-client workstation.

Setting	Required Information
[Shared]	
SHAREDACCESS	REMOTE
SHAREDCFGPATH	path of the shared directory of the Administrator into which the thick client reports
SHAREDHOST	name of the server where the instance of Express Server associated with the shared databases of the administrator into which the thick client reports is running
SHAREDPORT	XCA port number for the instance of Express Server associated with the shared databases of the administrator into which the thick client reports
SHAREDHOSTTYPE	the server type on which the shared databases of the administrator into which the thick client reports are located
[Super]	
SUPERACCESS	
SUPERCFGPATH	
SUPERHOST	
SUPERPORT	
SUPERHOSTTYPE	
[Path]	
CODECFGPATH	path of the code directory of the thick-client workstation, such as *oracle_home*/olap/ofa*xxx*/client/
TMPFILEPATH	path of the temporary directory of the thick-client workstation, such as *oracle_home*/olap/ofa*xxx*/client/thick/*database_name*/ where *database_name* is the name of the thick-client workstation
TASKFILEPATH	

Code Configuration File

Introduction

The code configuration file (`ofacdcf.cfg`) contains information about the location of the code databases and allows the declaration of a primary custom database. It also contains information that is used to populate the `ofacdcf.db` database at run time.

File contents

The code configuration file contains the following settings.

Setting	Required Information
[Code Databases Path]	
OFACODEPATH	location of the CODE directory
[Primary Custom Database]	
OFALCNAME	name of the primary custom database, which should be located in the CODE directory (required only if you have a custom database to attach)

Personal Configuration File

Introduction

A personal configuration file (`database_name.cfg`) exists for each personal database in a Financial Analyzer system. It contains information about the location of the system configuration file that is used by that workstation. The personal configuration file for a Super administrator workstation also specifies whether the Oracle General Ledger Integration Module is installed.

File contents

The personal configuration file contains the following settings.

Setting	Required Information
OFASYSCFPATH	path to the ofasyscf.cfg file used by the workstation. (For a thin-client workstation, it references the ofasyscf.cfg file located in the SHARED directory of the administrator to which the workstation reports. For a thin-client workstation in a cluster, it references the ofasyscf.cfg file in the SHARED directory of the cluster. For a thick-client workstation, it points to the ofasyscf.cfg file in the personal directory of the client.)
USEORAGL	YES (for a Super administrator workstation with the Oracle General Ledger Integration Module installed) *or* NO (for all other workstations and for a Super administrator workstation that does not have the Oracle General Ledger Integration Module installed)

5

Manual Installations

Chapter summary

You can manually configure Administrator and Super administrator workstations as thick or thin clients.

List of topics

This chapter includes the following topics:

- Creating a Thick-Client Administrator or Super Administrator on a PC
- Creating a Thin Client Administrator or Super Administrator as Part of a Cluster

Creating a Thick-Client Administrator or Super Administrator on a PC

Introduction

This topic describes how to create a thick client or Super administrator workstation on a PC.

Procedure: Setting up an Administrator or Super administrator workstation

Follow these steps to set up an Administrator or Super administrator workstation on a PC:

1. Use Installer to install the client and server components of a Super administrator workstation.

> **Note:** This installation creates a directory structure, a set of configuration files, a set of shell databases, and a Super administrator personal database for use by the Super administrator.

2. Start the system using thin client mode.

3. If you are configuring a thick-client Administrator workstation, use Installer and the Financial Analyzer User Maintenance features to install and set up an Administrator workstation.

4. Install a thick-client Budget workstation on the PC, naming the new personal database the same name as the personal database that you are moving.

   Performing this step places a code database, which is necessary for a thick-client installation, on the PC. It also installs a system configuration file in the same directory.

5. Move the personal database that you created in Step 1 to the directory where the personal database for the thick-client Budget workstation is located.

6. If configuring an Administrator workstation, edit the `ofasyscf.cfg` file on the PC and update the `[Super]` section with the information contained in the `[Super]` section of the corresponding `ofasyscf.cfg` file in the shared directory of the Administrator component.

Creating a Thin Client Administrator or Super Administrator as Part of a Cluster

Introduction

This topic describes how to create a thin client or Super administrator workstation as part of a cluster.

Procedure: Setting up an Administrator or Super administrator workstation on an existing cluster

Follow these steps to set up an Administrator or Super administrator workstation as part of an existing cluster on a Unix or NT server:

1. Install and start up an Administrator or Super administrator workstation.

2. If you have not installed the cluster where this Administrator or Super administrator workstation will be located, install it.

The Administrator or Super administrator workstation will use the code database that is created as part of the cluster installation.

3. Move the personal database and personal configuration file for the Administrator or Super administrator workstation from its installed location to the new location in the cluster.

4. Edit the personal configuration file and set the SHAREDCFGPATH setting to the SHARED directory for the cluster.

5. If the system configuration file (ofasyscf.cfg) does not exist in the SHARED directory of the cluster, create it.

   For information about how to create this file, refer to Chapter 4.

6. If configuring an Administrator workstation, edit the ofasyscf.cfg file in the shared directory of the cluster and update the [Super] section with the information contained in the [Super] section of the corresponding ofasyscf.cfg file in the shared directory of the Administrator component.

A

Troubleshooting the Initial Startup Process

Appendix summary

This appendix provides information about the most common types of errors and the corresponding error messages that you may encounter as you start Financial Analyzer for the first time or use Financial Analyzer after upgrading.

List of topics

This appendix includes the following topics:

- Error in connecting to Express
- Error in attaching to the personal database
- Error in starting up a workstation

Error in connecting to Express

Message text

If there is an error in connecting to Express, you may receive the following message: "Cannot connect to Express."

Reasons for the error

The message "Cannot connect to Express" indicates that you are not able to make a connection to an Express Server session for one of the following reasons:

- You have provided incorrect login information. Verify all login information that you provided when logging into Express Server, which includes:

  Username

  Password

  Domain, if required

  Server, if required

  UUID or EndPoint, if required

- The necessary TCP/IP software may not be installed on the client. Check with your network administrator.

- The Express Server service may not be running. Check the Express Service manager for the instance of Express Server that you are using.

- The Express Server client support files have not been installed or cannot be found. Verify whether the xpdb.db file is located in the oracle_home/OLAP/OES630/SERVICE/OEC630 directory. If the directory and file do not exist, they have not been installed. Install them. If the file exists, check the File I/O option in the Express Service Configuration Manager to verify that the ServerDBPath setting contains the oracle_home/OLAP/OES630/SERVICE/OEC630 directory. If it does not, edit the setting.

- For NT installations the network ID that you are using to log into Financial Analyzer requires the Log on locally right. Check with your network administrator to verify that this right has been set for the network ID.

Error in attaching to the personal database

Message text

If there is an error in attaching to the personal database specified in the Express Server Login, you may receive the following message: "Cannot attach to personal database because it cannot be found or it is already attached by another user."

Reasons for the error

The message "Cannot attach to personal database because it cannot be found or it is already attached by another user" indicates that you cannot attach to the personal database specified in the Express Server Login for one of the following reasons:

- An incorrect personal database name or path has been supplied. Verify that you have entered the correct name and path.

- The Personal Database may already be in use. You cannot connect to this database until the person currently attached to the database finishes their session.

- You do not have read/write access to the personal database. Check with your system administrator.

- You may have re-booted your PC and the Express Server session you were originally working in may not have correctly terminated. Ask your system administrator to terminate your previous session using the Express Server Session Manager.

Error in starting up a workstation

Message text

If there is an error in starting up a workstation, you may receive the one of the following messages: "Cannot attach the OFAS database" or "You are not a valid Oracle Financial Analyzer user."

Reasons for error

The messages "Cannot attach the OFAS database" and "You are not a valid Oracle Financial Analyzer user" indicate that an error has occurred for one of the following reasons:

- There is no operating system username associated with the Financial Analyzer user for this workstation.

- The change to the user specification has not been run through the Task Processor.

B

Renaming or Changing the Location of Shared Databases

Appendix summary

This appendix provides information about how you can change the default names of the Financial Analyzer shared databases after installation. It also explains how to change the location of individual shared databases from the default locations into which they are installed.

List of topics

This appendix includes the following topics:

- Changing the Default Name of a Shared Database
- Modifying the Configuration File

Changing the Default Name of a Shared Database

Introduction

This topic discusses the shared databases that are created when you install a Financial Analyzer workstation and provides the default names given to each database.

Shared databases and their default names

When you install Financial Analyzer, a set of databases with the following default names is installed in the SHARED directory:

- ofas.db

- ofastask.db

- ofasctl.db

- ofaslck.db

In some circumstances you may wish to change the name of these databases. You can rename all or any number of them.

Moving a Shared Database from Its Default Location

The set of shared databases discussed previously is installed by default into the SHARED directory. Under some circumstances you may want to move some of these files into different directory locations.

Modifying the Configuration File

Introduction

If you rename or move a shared database file, you must edit the system configuration file, ofasyscf.cfg, to reflect the changes you have made. This topic describes the changes that you need to make to the settings in this file.

System configuration file

The [Shared] section of the system configuration file (ofasyscf.cfg)contains the following settings:

```
[Shared]
SHAREDACCESS= . . .
SHAREDCFGPATH= . . .
SHAREDHOST= . . .
SHAREDPORT= . . .
SHAREDHOSTTYPE= . . .
```

If you rename or move the shared database files, you need to add settings to this file so that the system can find and access the files under their new names or in their new locations.

Settings to add

The following table lists the settings to add to the ofasyscf.cfg file if you rename or move the shared database files.

Note: When you add settings to the ofasyscf.cfg file, you must match the capitalization exactly as it is shown in this table.

IF you . . .	THEN add this line to the configuration file . . .
rename the ofas database file,	OFASNAME=*new name of the ofas database.*
move the ofas database from the default SHARED directory,	OFASPATH=*new location of the ofas database.*
rename the ofastask database file,	OFASTASKNAME=*new name of the ofastask database.*
move the ofastask database from the default SHARED directory,	OFASTASKPATH=*new location of the ofastask database.*
rename the ofasctl database file,	OFASCTLNAME=*new name of the ofasctl database.*
move the ofasctl database from the default SHARED directory,	OFASCTLPATH=*new location of the ofasctl database.*
rename the ofaslck database file,	OFASLCKNAME=*new name of the ofaslck database.*
move the ofaslck database from the default SHARED directory,	OFASLCKPATH=*new location of the ofaslck database.*

Example: Renaming the ofas.db database

Configuration that requires the database to be renamed

If your system is configured so that a single instance of Express Server is associated with two or more Administrator workstations (one of which may be a Super administrator workstation), you need to rename the ofas.db database of one of the administrators so that each is known to the Express Server instance by a unique name.

Why a unique database name is required

When the ofas.db database reaches a maximum size of 2GB, Express Server creates an extension file and names it using the shared database name. The default name for this extension file would be ofas.001.

Note: Express Server automatically places the extension file in the directory that you specified in the `ExtensionFilePath` setting of the File I/O option in the Express Configuration Manager.

If you do not rename one of the `ofas.db` database files, conflicts can occur within Express Server if extension files become necessary.

Sample procedure: Renaming the ofas.db file

The following sample procedure describes renaming a database file:

1. Rename the appropriate shared database file.

2. Edit the appropriate system configuration file and add an `OFASNAME` setting in the `[Shared]` section of the file, as shown in the following example.

```
[Shared]
SHAREDACCESS= . . .
SHAREDCFGPATH= . . .
SHAREDHOST= . . .
SHAREDPORT= . . .
SHAREDHOSTTYPE= . . .
OFASNAME=ofas1
```

For detailed information about editing configuration files, refer to Chapter 4.

C

Reducing the Number of Code Databases on a Server

Appendix summary

If you have installed multiple workstations that have a separate copy of the code databases on a single server, you can set up your system to eliminate the redundant instances. Reducing the number of code databases on the server can make maintaining your system more efficient.

List of topics

This appendix contains the following topics:

- Configurations That Produce Multiple Instances of the Code Database
- Reducing the Number of Code Databases on a Server

Configurations That Produce Multiple Instances of the Code Database

Introduction

This topic describes configurations that produce multiple instances of the code database when they are installed on a single server.

List of configurations

The following configurations provide multiple copies of the code database when they are installed on a single server:

- A Super administrator workstation and a cluster
- An Administrator workstation and a cluster
- A Super administrator and a subordinate administrator workstation
- A combination of the above configurations

Reducing the Number of Code Databases on a Server

Introduction

This topic describes how to reduce the number of code databases on a single server.

Procedure: Reducing the number of code databases on a server

The following procedure explains how to reduce the number of code databases on a single server:

1. Decide which code database you want to use for all workstations on the server.

2. Edit the `ofasyscf.cfg` file associated with the shared database of each workstation or cluster so that the `CODECFGPATH` entry references that code database.

3. Delete the unused copies of the code database from the server, if you like.

   Note: You can retain the unused copies of the code database, but they will not be accessed when you use your Financial Analyzer system.

D

Setting Up and Maintaining the AS Portlets

Appendix summary

This appendix describes the post-installation set up tasks for the AS Portlets. It also describes other AS Portlet maintainance tasks. .

List of topics

This appendix contains the following topics:

- Registering the AS Portlet Provider
- Adding Databases to the AS_PORTAL_DATABASE_LIST Table
- Removing Databases from the AS_PORTAL_DATABASE_LIST Table
- Clearing the AS Portlets Cache
- Troubleshooting Potential Problems

Registering the AS Portlet Provider

Verifying that you are ready to perform the registration

After you have completed the installation, you should be ready to register the AS Portlet provider with Oracle Portal. It is a good idea, however, to verify that this is the case before proceeding.

To check that you are ready to register the portlet provider, enter the following URL in your Web browser:

```
http://apache.server.location/servlet/asportlets
```

The browser should display a page that informs you that you have successfully reached your portlet provider's test page, which indicates that you are ready to register the provider.

If you receive a message that indicates that access is forbidden, you must add the following line to the zone.properties file:

```
servlet.asportlets.initArgs=debuglevel=1
```

Procedure: Registering the portlet provider

Use the following procedure to register the AS Portlet provider:

1. Log in to Oracle Portal

2. Choose the Administer tab

3. Select **Add a Portlet Provider**

4. In the Implementation Style box, select **Web**

5. In the URL box, enter the URL for the portlet provider:

   ```
   http://apache.server.location/servlet/asportlets
   ```

6. Choose **OK**.

The AS Portlet provider will now be available, along with the other providers.

Adding Databases to the AS_PORTAL_DATABASE_LIST Table

Introduction

To make an Express database available to Oracle Portal users, you must add the necessary information about the database to the AS_PORTAL_DATABASE_LIST table.

Using DBA Studio to add databases

Oracle Corporation recommends that you use Oracle Enterprise Manager DBA Studio to add databases to the AS_PORTAL_DATABASE_LIST table. Specify the

indicated information in the columns in the AS_PORTAL_DATABASE_LIST table, as follows:

Column Name	Information to Specify
DATABASE_KEY	The primary key for the database
SERV_URL	The URL that points to the Express Web Agent CGI executable and the Express instance
SERV_DESC	A text description for the Express Web Agent CGI executable and Express instance pointed to by express_server_url. The description must be a continuous string; you can use underscores to separate words, but you cannot use spaces.
DB	The name of the Express database. For Financial Analyzer databases, express_db is the path name for the database, not including the name of the file. For example: d:/orant/olap/ofa*xxx*/ where *xxx* represents the current release of Financial Analyzer.
DB_DESC	A text description for the database. The description must be a continuous string; you can use underscores to separate words, but you cannot use spaces.
APP_TYPE	Specify OFA for Financial Analyzer databases
TIMESTAMP	The time and date of the update to the table
SYSTEM_OS	One of the following values, depending on the operating system for the database ■ Specify WIN for Windows operating systems ■ Specify UNIX for Unix operating systems
SINGLE_SIGN_ON	One of the following values, depending on whether the database is a single sign-on database: ■ Specify YES if the database is single sign-on ■ Specify NO if the database is not single sign-on

Using the AddExpressEntry script to add databases

As an alternative to using DBA Studio, you can use the AddExpressEntry script to populate the AS_PORTAL_DATABASE_LIST table with the necessary information about the Express database. Following the installation, the files for the AddExpressEntry script will be in the PTL*xxx*/PTLWEB/SQL directory under the Oracle Home where *xxx* represents the current release of Financial Analyzer. For

Windows systems, run the `AddExpressEntry.cmd` script; for Unix systems, run the `AddExpressEntry` script.

The syntax and parameters are the same for both the Windows and Unix versions of the script, with the exception of the name of the script itself. Each invocation of the script adds one Express database to the table, so you must run the script once for each database that you want to add.

Syntax for AddExpressEntry

The syntax for the Windows version of the AddExpressEntry script is as follows:

```
addexpressentry.cmd -s express_server_url
-sd express_server_desc -db express_db -dbd express_db_desc
-a app_type -os sys_os -sso single_sign_on
-as as_portlet_user -asp as_portlet_pwd -c connect_string
```

Note: The syntax for the Unix version is identical, except that the name of the script is `addexpressentry` instead of `addexpressentry.cmd`.

Parameters for AddExpressEntry

The parameters for the `AddExpressEntry` script are as follows:

s *express_server_url*

express_server_url is the URL that points to the Express Web Agent CGI executable and the Express instance.

-sd *express_server_desc*

express_server_desc is a text description for the Express Web Agent CGI executable and Express instance pointed to by *express_server_url*. The description must be a continuous string; you can use underscores to separate words, but you cannot use spaces.

-db *express_db*

express_db is the name of the Express database. For Financial Analyzer databases, *express_db* is the path name for the database, not including the name of the file. For example

```
d:/orant/olap/ofaxxx/
```

where *xxx* represents the current release of Financial Analyzer.

-dbd *express_db_desc*

express_db_desc is a text description for the database. The description must be a continuous string; you can use underscores to separate words, but you cannot use spaces.

-a *app_type*

app_type indicates the application under which the database was created.

Use OFA to indicate that the database was created under Financial Analyzer

-os *sys_os*

sys_os indicates the operating system for the database. Specify one of the following values for *sys_os*:

- WIN -- Indicates that the operating system is Windows

- UNIX -- Indicates that the operating system is Unix

-sso s*ingle_sign_on*

single_sign_on indicates whether the database is a single sign-on database. Specify one of the following values for *single_sign_on*:

- YES -- Indicates that the database is a single sign-on database

- NO -- Indicates that the database is not a single sign-on database

-as *as_portlet_user*

as_portlet_user is the user ID for the schema that contains the AS_PORTAL_DATABASE_LIST table.

-asp *as_portlet_pwd*

as_portlet_pwd is the password associated with the *as_portlet_user* user ID.

-c *connect_string*

connect_string is the name of the entry in the TNS names file that specifies the connection to a remote database. This parameter is required only if the database is a remote database. If the database is a local database, omit this parameter entirely.

AddExpressEntry example

The following example shows how to specify the parameters for the AddExpressEntry script for a local Financial Analyzer single sign-on database named test.db, where the URL for the Express Web Agent CGI executable and Express instance is www.test.com, the operating system is Windows, and the user ID and password for the schema that contains the AS_PORTAL_DATABASE_LIST table are both asportlet:

```
addexpressentry.cmd -s http://www.test.com
-sd express_server -db test.db -dbd test_database -a osa
-os win -sso yes -as asportlet -asp asportlet
```

Removing Databases from the AS_PORTAL_DATABASE_LIST Table

Introduction

To remove users' access to a database, you must remove the entry that pertains to that database from the AS_PORTAL_DATABASE_LIST table.

Using DBA Studio to remove databases

Oracle Corporation recommends that you use Oracle Enterprise Manager DBA Studio to remove an Express database from the AS_PORTAL_DATABASE_LIST table. In DBA Studio, delete the entry for any database to which you no longer want users to have access.

Using the DeleteExpressEntry script to remove databases

As an alternative to using DBA Studio, you can use the DeleteExpressEntry script to remove a database from the table. Following the installation, the files for the DeleteExpressEntry script will be in the PTL*xxx*/PTLWEB/SQL directory under the Oracle Home where *xxx* represents the current release of Financial Analyzer. For Windows systems, run the DeleteExpressEntry.cmd script; for Unix systems, run the DeleteExpressEntry script.

Each invocation of the script removes one Express database from the table, so you must run the script once for each database that you want to remove.

Syntax for DeleteExpressEntry

The syntax for the Windows version of the DeleteExpressEntry script is as follows:

```
deleteexpressentry.cmd -s express_server_url
-db express_db -as as_portlet_user -asp as_portlet_pwd
-c connect_string
```

Note: The syntax for the Unix version is identical, except that the name of the script is deleteexpressentry instead of deleteexpressentry.cmd.

Parameters for DeleteExpressEntry

The parameters for the DeleteExpressEntry script are as follows:

-s *express_server_url*

express_server_url is the URL that points to the Express Web Agent CGI executable and the Express instance.

db *express_db*

express_db is the name of the Express database.

For Financial Analyzer databases, express_db is the path name for the database, not including the name of the file. For example:

```
d:/orant/olap/ofaxxx/
```

where *xxx* represents the current release of Financial Analyzer.

as *as_portlet_user*

as_portlet_user is the user ID for the schema that contains the AS_PORTAL_DATABASE_LIST table.

-asp *as_portlet_pwd*

as_portlet_pwd is the password associated with the as_portlet_user user ID.

-c *connect_string*

connect_string is the name of the entry in the TNS names file that specifies the connection to a remote database. This parameter is required only if the database is a remote database. If the database is a local database, omit this parameter entirely.

DeleteExpressEntry Example

The following example shows how to specify the parameters for the DeleteExpressEntry script for a local Financial Analyzer database named test.db, where the URL for the Express Web Agent CGI executable and Express instance is `www.test.com` and the user ID and password for the schema that contains the `AS_PORTAL_DATABASE_LIST` table are both asportlet:

```
deleteexpressentry.cmd -s http://www.test.com -db test.db
-as asportlet -asp asportlet
```

Clearing the AS Portlets Cache

Introduction

If Express data has changed, and you want users to be able to view the new data without having to refresh data themselves, you need to clear the AS portlets cache.

Using DBA Studio to clear the cache

Oracle Corporation recommends that you use Oracle Enterprise Manager DBA Studio to clear the cache by removing entries from the `AS_PORTAL_CACHE` table. In DBA Studio, delete the entries for any users for whom you want to clear the cache.

Using the ClearCache script to clear the cache

As an alternative to using DBA Studio, you can use the `ClearCache` script to clear the cache. You can clear the cache for all users at once, or for a single user.

Following the installation, the files for the `ClearCache` script will be in the `PTLxxx/PTLWEB/SQL` directory under the Oracle Home where *xxx* represents the current release of Financial Analyzer. For Windows systems, run the ClearCache.cmd script; for Unix systems, run the `ClearCache` script. The syntax and parameters are the same for both the Windows and Unix versions of the script, with the exception of the name of the script itself.

Syntax for ClearCache

The syntax for the Windows version of the `ClearCache` script is as follows:

```
clearcache.cmd -u user -as as_portlet_user
-asp as_portlet_pwd -c connect_string
```

> **Note:** The syntax for the Unix version is identical, except that the name of the script is `clearcache` instead of `clearcache.cmd`.

Parameters for ClearCache

The parameters for the `ClearCache` script are as follows:

-u *user*

user is the Portal user or users for whom you want to clear the cache. Specify `ALL` to clear the cache for all users or specify the user ID to clear the cache for a single user.

-as *as_portlet_user*

as_portlet_user is the user ID for the schema that contains the `AS_PORTAL_DATABASE_LIST` table.

-asp *as_portlet_pwd*

as_portlet_pwd is the password associated with the as_portlet_user user ID.

-c *connect_string*

connect_string is the name of the entry in the TNS names file that specifies the connection to a remote database. This parameter is required only if the database is a remote database. If the database is a local database, omit this parameter entirely.

ClearCache Example

The following example shows how to specify the parameters for the `ClearCache` script for all AS Portlets users named `test.db`, where the user ID and password for the schema that contains the `AS_PORTAL_DATABASE_LIST` table are both asportlet:

```
deleteexpressentry.cmd -s http://www.test.com -db test.db
-as asportlet -asp asportlet
```

Troubleshooting Potential Problems

Version of the xmlparserv2.jar file

You must have a current version of the `xmlparserv2.jar` file. You probably have an old version of the file if you find an error such as the following in the jserv.log file:

```
[07/11/2001 15:49:15:812] (ERROR) ajp12: Servlet Error:
java.lang.NoClassDefFoundError: org/xml/sax/XMLReader:
org/xml/sax/XMLReader
```

You can obtain a new version of the file through `http://technet.oracle.com`. You must reference this `.jar` file in your jserv.properties file. Also, be sure that you do not have any references to any other `xmlparserv2.jar` file.

Loading sequence for the cryptix32.jar file

The `cryptix32.jar` file must be loaded first. If it is not, you may find an error such as the following in the jserv.log file:

```
[10/12/2001 16:55:51:836 EST] java.lang.NoSuchMethodError:
netscape.security.PrivilegeManager: method
revertPrivilege(Lnetscape/security/Target;)V not found
```

If this error occurs, move the entry in the `jserv.properties` file that refers to the `cryptix32.jar` file so that it is the first file to be loaded.

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