

WebFOCUS

WebFOCUS and ReportCaster
Installation and Configuration
for UNIX
Release 8206

July 29, 2020

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Preface

This content describes how to install and configure WebFOCUS and WebFOCUS ReportCaster on machines running UNIX operating systems. This documentation is intended for system administrators with knowledge of UNIX operating systems.

How This Manual Is Organized

This manual includes the following chapters:

Chapter/Appendix	Contents
1 Introducing WebFOCUS and ReportCaster Installation	Provides an overview of WebFOCUS and ReportCaster, including how WebFOCUS and ReportCaster process report requests, and the available installation configurations.
2 WebFOCUS and ReportCaster Installation Requirements	Provides the necessary requirements for installing and configuring WebFOCUS and ReportCaster.
3 Installing the WebFOCUS Client	Describes how to install the WebFOCUS Client on UNIX.
4 Configuring Web and Application Servers	Contains instructions for configuring web and application servers to run WebFOCUS and ReportCaster.
5 Post-Installation Verification and Configuration	Describes how to configure WebFOCUS Client.
6 WebFOCUS ReportCaster Post-Installation Tasks	Describes ReportCaster post-installation tasks.
7 Business Intelligence Portal and Home Page Verification and Security	Provides instructions for verifying and setting up WebFOCUS Business Intelligence Portal.
8 Troubleshooting WebFOCUS and ReportCaster	Provides information for tracking errors and debugging WebFOCUS problems.
9 Solr Installation and Configuration	Describes how to configure Solr, an open-source, high-performance, full-featured enterprise-search platform.
A Magnify Configuration	Contains instructions to configure Magnify.

	Chapter/Appendix	Contents
B	Additional Graph Configuration Options	Explains how to configure WebFOCUS graphics options.
C	Additional WebFOCUS Repository Topics and Tasks	Provides additional information on the WebFOCUS Repository.

Conventions

The following table describes the conventions that are used in this manual.

Convention	Description
<p>THIS TYPEFACE</p> <p>or</p> <p>this typeface</p>	Denotes syntax that you must enter exactly as shown.
<i>this typeface</i>	Represents a placeholder (or variable) in syntax for a value that you or the system must supply.
<u>underscore</u>	Indicates a default setting.
<i>this typeface</i>	Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices. Type one of them, not the braces.
[]	Indicates a group of optional parameters. None are required, but you may select one of them. Type only the parameter in the brackets, not the brackets.
	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.

Convention	Description
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).
. . .	Indicates that there are (or could be) intervening or additional commands.

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To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

Information You Should Have

To help our consultants answer your questions effectively, be prepared to provide the following information when you call:

- Your six-digit site code (xxxx.xx).
- Your WebFOCUS configuration:
 - The front-end software you are using, including vendor and release.
 - The communications protocol (for example, TCP/IP or HLLAPI), including vendor and release.
 - The software release.
 - Your server version and release. You can find this information using the Version option in the Web Console.
- The stored procedure (preferably with line numbers) or SQL statements being used in server access.
- The Master File and Access File.
- The exact nature of the problem:
 - Are the results or the format incorrect? Are the text or calculations missing or misplaced?
 - Provide the error message and return code, if applicable.
 - Is this related to any other problem?
- Has the procedure or query ever worked in its present form? Has it been changed recently? How often does the problem occur?
- What release of the operating system are you using? Has it, your security system, communications protocol, or front-end software changed?
- Is this problem reproducible? If so, how?
- Have you tried to reproduce your problem in the simplest form possible? For example, if you are having problems joining two data sources, have you tried executing a query containing just the code to access the data source?
- Do you have a trace file?

- ❑ How is the problem affecting your business? Is it halting development or production? Do you just have questions about functionality or documentation?

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Thank you, in advance, for your comments.

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Introducing WebFOCUS and ReportCaster Installation

This chapter provides an overview of WebFOCUS and ReportCaster and their installation and configuration procedures. For detailed information on the capabilities and functions of these products, see the *ReportCaster* manual.

In this chapter:

- ❑ [About WebFOCUS and ReportCaster](#)
 - ❑ [WebFOCUS Installation Overview](#)
 - ❑ [ReportCaster Installation Overview](#)
 - ❑ [WebFOCUS and ReportCaster Installation and Configuration Steps](#)
 - ❑ [Application Server and Web Application Overview](#)
 - ❑ [Security and User IDs for WebFOCUS and ReportCaster](#)
-

About WebFOCUS and ReportCaster

WebFOCUS is a complete, web-ready data access and reporting system that connects users to data. WebFOCUS accesses and processes information located in any format on any platform and presents that information to users through a web browser or through formats, such as PDF, XLS, and XML. Using HTML and user friendly GUI tools, WebFOCUS developers can build powerful webpage interfaces that allow users to create and view reports.

WebFOCUS data access, network communications, and server operations are provided through WebFOCUS technology. WebFOCUS technology accesses data without concern for the complexities and incompatibilities of different operating systems, databases, file systems, file formats, and networks. You can access both local and remote data on over 35 platforms from more than 65 database formats, including SQL Server™, Oracle®, Ingres®, SAP®, and Db2®.

ReportCaster is an independent application that provides advanced scheduling and distribution capabilities for WebFOCUS reports, procedures, and alerts, as well as independent files and URLs. Using ReportCaster, reports and files are automatically distributed on a monthly, weekly, daily, or specific day basis.

WebFOCUS Installation Overview

This section briefly explains the different WebFOCUS installation components, as well as how those components interact and are configured.

WebFOCUS and Your Network

WebFOCUS seamlessly integrates into your existing network by connecting web servers and application servers to your data. End users, developers, and administrators then access WebFOCUS through a web browser.

The main requirements for installing WebFOCUS are:

- ❑ **Web Browser.** To access WebFOCUS applications, you need a web browser and a TCP/IP connection to a web server or application server.
- ❑ **Web Server and Application Server.** WebFOCUS runs in part through a web server or application server. WebFOCUS is flexible and offers several configuration options, so you can choose whether to use both a web server and an application server or just an application server. Apache Tomcat™ is provided and can be used as both a web server and application server.

Web servers handle requests by returning static files to a web browser or by executing processes that provide additional functionality. Application servers execute Java servlets or other processes that the web server does not handle.

WebFOCUS functionality can be implemented using Java servlets. Connecting with Java servlets is required for most advanced features. For Java servlets, an application server is required and you can use WebFOCUS with or without an external web server.

Note: Either an application server or a servlet container or engine can be used to process WebFOCUS Java requests. However, the term *application server* is used in this documentation unless referring to a specific third-party product.

- ❑ **Data.** WebFOCUS can access data from almost anywhere. To access data, you should know its location on your network and any necessary sign-in information.

A complete list of requirements is provided in [WebFOCUS and ReportCaster Installation Requirements](#) on page 29.

WebFOCUS Components

There are two main WebFOCUS components to install:

- ❑ **WebFOCUS Client.** The WebFOCUS Client runs as part of your application server and connects WebFOCUS to the web. When a user makes a request from a browser, the WebFOCUS Client receives and processes the request by passing it to the WebFOCUS Reporting Server. The WebFOCUS Client installation includes:
 - ❑ Java-based web connectivity components.
 - ❑ User interfaces, tools, and utilities.
- ❑ **WebFOCUS Reporting Server.** The WebFOCUS Reporting Server resides on machines that can access your data. The WebFOCUS Reporting Server provides data access, number crunching, and report generation functionality using WebFOCUS integration technology.

During the WebFOCUS Client and ReportCaster installation, your license determines the components you install. The following options are available:

- ❑ **Business Intelligence Portal (BI Portal).** BI Portal enables your organization to grant authorized users access to information they need while restricting unauthorized users from sensitive or confidential data.
 - ❑ **InfoAssist.** WebFOCUS InfoAssist extends the power of WebFOCUS Managed Reporting. InfoAssist provides business users with the most advanced, yet simple to use, ad hoc reporting features needed to create intricate reports and perform insightful analysis.
 - ❑ **Favorites.** Favorites are reports, graphs, hyperlinks, and any other item type, except Reporting Objects, that are added to the Favorites list of a Managed Reporting user. Adding items to the Favorites list enables you to display the items on mobile devices.
- ❑ **ReportCaster.** ReportCaster is an independent application that provides advanced scheduling and distribution capabilities for WebFOCUS reports, procedures, and alerts, as well as independent files and URLs.
- ❑ **Magnify.** Magnify is an enterprise search solution that allows you to search your structured and unstructured business content across multiple data sources and systems. The Magnify search page is an easy-to-use, interactive user interface that dynamically categorizes search results, allows you to sort results based on several criteria, and includes an option to present results in a tabular format. It can also offer you access to real-time data (for instance, by including links to WebFOCUS reports in the search results).
- ❑ **WebFOCUS Web Services.** WebFOCUS Web Services allow you to develop applications in the .NET or Java environments and perform WebFOCUS functionality from it.

The following WebFOCUS products can be purchased and installed separately:

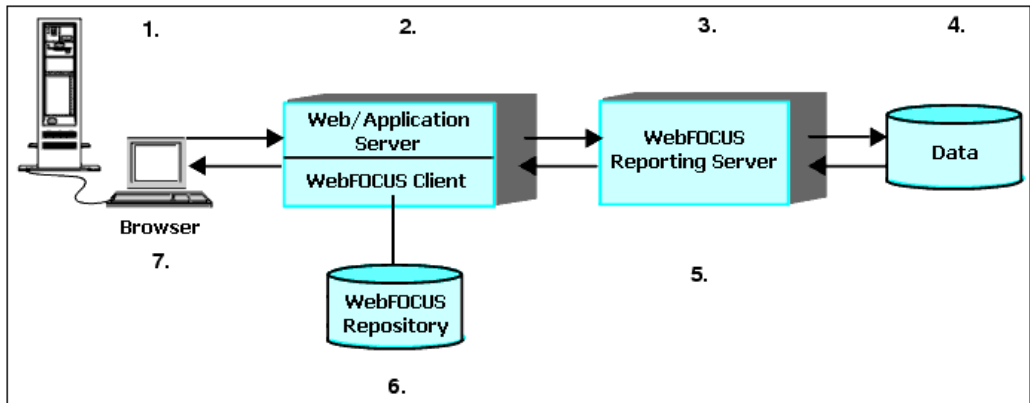
- ❑ **WebFOCUS App Studio.** App Studio can be installed on Windows and provides a development environment for WebFOCUS and Maintain applications. App Studio enables you to create advanced applications using a Windows GUI environment. For more information, see the App Studio documentation.
- ❑ **WebFOCUS RStat.** WebFOCUS RStat is a statistical modeling workbench. It allows you to perform common statistical, data mining tasks, and develop models that can be deployed as scoring applications on every platform. RStat enables data miners and Business Intelligence developers to collaborate with the same tools used to access, manipulate, or transform data, develop predictive models, and create and deploy scoring applications, as well as associated reports, to any worker within their organization.
- ❑ **WebFOCUS Quick Data.** WebFOCUS Quick Data is a Microsoft® Office® add-on that enables you to connect Microsoft Excel® directly to WebFOCUS reporting tools, where you can access and analyze all of your enterprise data.
- ❑ **WebFOCUS Performance Management Framework (PMF).** PMF is a WebFOCUS application template for tracking, storing, and aggregating metrics into scorecards to clearly evaluate goals. For more information, see the *WebFOCUS Performance Management Framework* manual.

WebFOCUS Processing

The following steps and figure describe how WebFOCUS processes WebFOCUS report requests:

1. A user requests a report and passes parameters by calling a WebFOCUS servlet through links and forms on a webpage.
2. The request and parameters come to the WebFOCUS Client on the web or application server, which processes the parameters and creates a request for the WebFOCUS Reporting Server.
3. The WebFOCUS Reporting Server receives the request, processes it, and accesses any needed data.
4. Data is retrieved from data sources to process the request.
5. The WebFOCUS Reporting Server processes the request of the user using the retrieved data.
6. The response is returned to the WebFOCUS Client on the web or application server.

7. The response is returned to the user in the appropriate format (for example, HTML, XML, PDF, Excel, and PNG).



WebFOCUS Configuration

WebFOCUS employs a distributed architecture. This means that the WebFOCUS Client, the WebFOCUS Reporting Server, and your data can be located on any platform, anywhere in your network. You can easily connect an Apache web server running on UNIX to SQL Server data on Windows or Db2 data on z/OS.

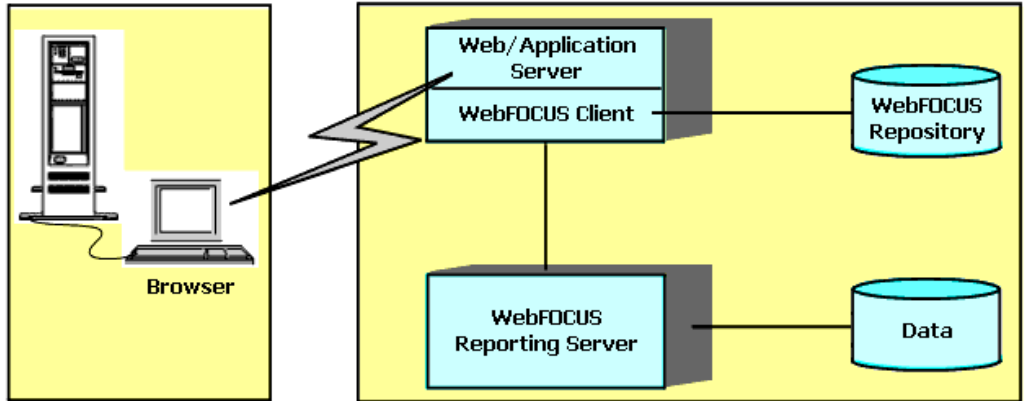
The configuration requirements are:

- The WebFOCUS Client must reside with the web and application servers.
- The WebFOCUS repository can reside on the same system or a different system.
- An instance of the WebFOCUS Reporting Server must be installed on machines with your data or machines that have access to your data. For example, if you are accessing Oracle, the WebFOCUS Reporting Server can be on the Oracle Server machine or on any machine with Oracle Client.

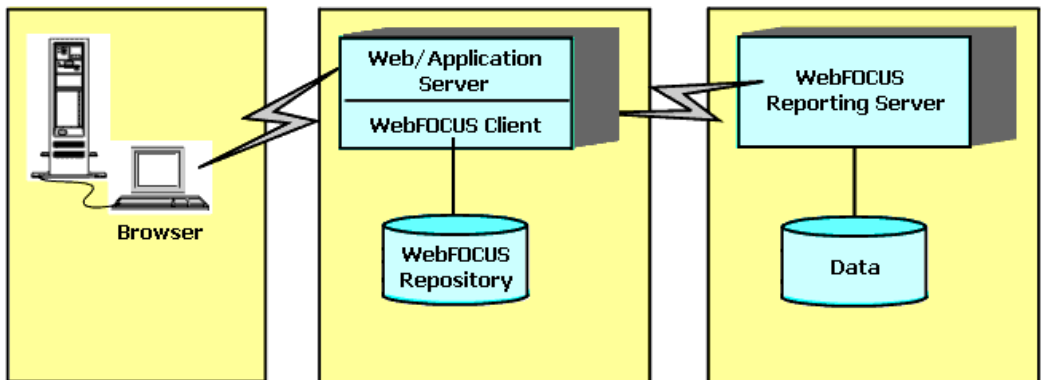
Note: All WebFOCUS components must be of the same release to communicate properly.

The following configurations are examples of how WebFOCUS could be distributed:

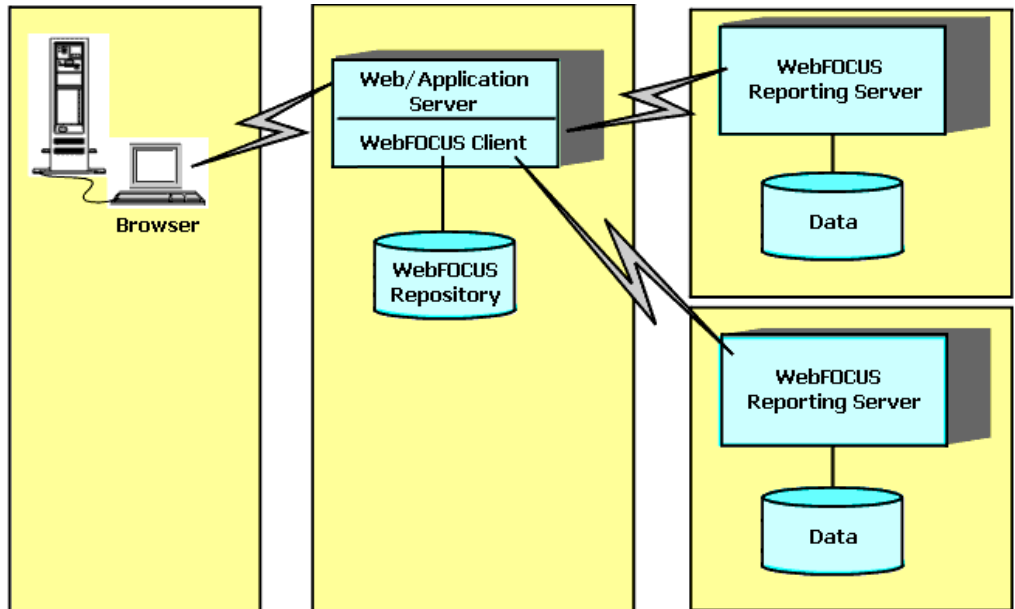
- ❑ **Stand-alone Configuration.** In a stand-alone configuration, the application server, WebFOCUS Client, WebFOCUS Reporting Server, and source data are all on the same machine.



- ❑ **Distributed Configuration.** In a distributed configuration, the WebFOCUS Client is installed on your web server, but the WebFOCUS Reporting Server and source data are on a different machine.



- Multiple Data Source Configuration.** If you have source data on several different machines, WebFOCUS can integrate that data into one reporting environment. To allow this, instances of the WebFOCUS Reporting Server should be installed on machines with access to your source data. WebFOCUS technology provides the data access and format conversion functionality. For more information on integrating data from multiple machines and platforms, refer to the server documentation.



Note: In the previous example, the WebFOCUS Client connects to multiple WebFOCUS Reporting Servers. In other configurations, you can connect the WebFOCUS Client to a single WebFOCUS Reporting Server and then connect that WebFOCUS Reporting Server to other WebFOCUS Reporting Servers (hub-sub). For some data sources, you may need to connect WebFOCUS Reporting Servers to each other to perform joins.

- Advanced Configuration Options.** WebFOCUS provides flexible options for more advanced configurations. You can run multiple instances of components and enable load balancing functionality. You can use the Cluster Manager to enable fail over and statistical analysis of the best WebFOCUS Reporting Server to use in a cluster. You can cluster your application servers, if you wish. You can use a web server only to forward requests to the application server through a firewall. For more information on advanced configuration options, see the *WebFOCUS Security and Administration* manual.

ReportCaster Installation Overview

This section briefly explains the different ReportCaster installation components, as well as how those components interact. If you are not using ReportCaster, proceed to [WebFOCUS and ReportCaster Installation and Configuration Steps](#) on page 24.

ReportCaster Components

ReportCaster enables you to schedule the delivery and automatic running of WebFOCUS reports and alerts, as well as independent files and URLs. ReportCaster distributes reports and files to individuals or lists through FTP, email, or a printer, and it can store reports in a Report Library.

There are three ReportCaster components:

- ❑ **ReportCaster Web Components.** ReportCaster web components are installed with the WebFOCUS Client as a J2EE web application. They include a user interface, an API, and connectivity components for managing delivery jobs and the Report Library.
- ❑ **ReportCaster Distribution Server.** The ReportCaster Distribution Server is a Java-based program that provides the back-end functionality to deliver reports and files. The Distribution Server can be installed with the WebFOCUS Client or installed on a separate machine.

Note: The ReportCaster Distribution Server is also referred to as the ReportCaster Server or the Distribution Server.

- ❑ **ReportCaster Tables.** The ReportCaster tables are part of the WebFOCUS repository, which ReportCaster uses for schedule, distribution, Report Library, and log information. You can store the WebFOCUS repository in a Derby™, Oracle, SQL Server, Db2, or any other supported JDBC™-compliant database.

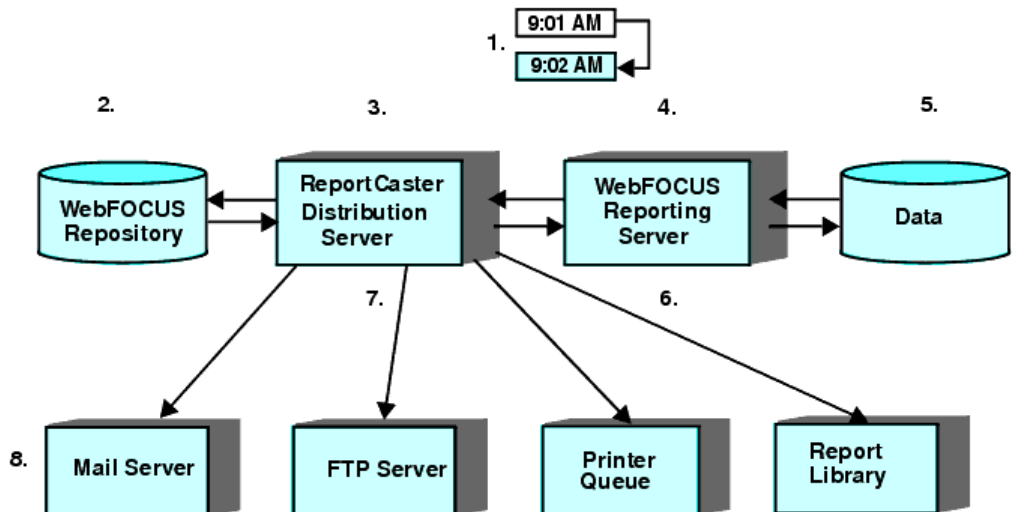
ReportCaster Processing

To schedule a delivery job, the ReportCaster Distribution Server is accessed through either a ReportCaster user interface or an external API. The ReportCaster API allows independent applications to schedule delivery jobs on the ReportCaster Distribution Server.

After jobs have been scheduled, the ReportCaster Distribution Server handles their execution and delivery. The following steps and figure describe how the Distribution Server processing identifies schedules to be run and distributes scheduled reports for scheduled WebFOCUS procedures (FEX).

1. The Distribution Server checks the repository every minute for jobs that are scheduled to run. You can change the default value of 1 minute within the ReportCaster configuration tool.

2. If jobs are found, the Distribution Server extracts the information from the WebFOCUS repository.
3. Each job is placed in a queue based on a priority setting found in the job description of the repository. Jobs in the queue are submitted to the WebFOCUS Reporting Server as resources become available.
4. The WebFOCUS Reporting Server receives each request, processes it, and accesses any needed data.
5. Data is retrieved from data sources to process the requests.
6. The WebFOCUS Reporting Server creates responses to the requests.
7. Responses are returned to the Distribution Server, which creates the addressing information necessary to send reports to their recipients. This includes any protocol-specific headers needed for email or FTP.
8. The Distribution Server sends files to the appropriate servers for delivery, such as a mail server for email or an FTP server for FTP. It can also place them in the Report Library.



ReportCaster Configuration

ReportCaster components can run on the same machine or be distributed across different machines. The ReportCaster web components are installed with the WebFOCUS Client and must reside on the application server. The ReportCaster Distribution Server can be installed on the same machine as other WebFOCUS components or on its own machine. The WebFOCUS repository, which contains ReportCaster tables, can be on the same machine as the Distribution Server or it can be on a separate machine.

WebFOCUS and ReportCaster Installation and Configuration Steps

There are several steps to the installation and configuration process:

1. **WebFOCUS and ReportCaster Introduction.** Review this section to ensure you understand the different components involved in the installation.
2. **Pre-Installation Tasks.** Before installing WebFOCUS and ReportCaster, review all the requirements.
3. **WebFOCUS Reporting Server Installation.** Install the WebFOCUS Reporting Server on machines with access to your source data. For more information, see the *Server Installation* manual.
4. **WebFOCUS Client and ReportCaster Installation.** Install the WebFOCUS Client and ReportCaster, as explained in *Installing the WebFOCUS Client* on page 47.
5. **Web Server or Application Server Configuration.** Configure your web server or application server, as explained in *Configuring Web and Application Servers* on page 87.

Important: For a split-tier environment, see *Configuring WebFOCUS in a Split Web-Tier and Application Server-Only Environment* on page 117.

6. **WebFOCUS Post-Installation Tasks.** Verify the WebFOCUS configuration and optionally change default settings, as explained in *WebFOCUS Post-Installation Tasks* on page 117.
7. **Post-Installation Data Access and Description.** Use the WebFOCUS Reporting Server Web Console and its Help system to configure adapters (data access) and create synonyms (data description) for your data sources. These steps are also documented in the *Server Administration* manual.

Review the *WebFOCUS Release Notes* document for information on known issues and documentation updates.

Application Server and Web Application Overview

This section provides some background information about third-party technologies used with WebFOCUS. It provides simplified overviews to assist those new to this technology.

Web Servers and Application Servers

The WebFOCUS Client and ReportCaster web components run as part of your application server.

- Web servers generally handle HTML, images (for example, PNG), and other traditional web content and processing. The terms web server and HTTP server are sometimes used interchangeably. Microsoft IIS and Apache HTTP Server are common web servers.

- ❑ Application servers (or servlet containers) generally handle Java and non-traditional processing. In WebFOCUS documentation, the term application server refers to an application server, servlet container, servlet engine, or J2EE engine. IBM® WebSphere®, Oracle® WebLogic®, Oracle Java® System Application Server, and Apache Tomcat™ are common application servers or servlet containers.

Some application servers have a robust web server (HTTP) component and do not require an external web server. For example, Apache Tomcat can be used both as a web server and application server. You use an application server for all WebFOCUS processing, but you can use a web server to forward requests through a firewall to the application server.

Web Applications

Some WebFOCUS and ReportCaster functionality is provided in J2EE web applications (webapps). A J2EE web application is a packaged collection of Java, text, graphic, and other files that function as an application or service. A web application is organized as a set of directories that can be placed into a Web Archive (.war) file. A WAR file is similar to a ZIP or TAR file in that it contains other files and preserves their directory structure.

A web application must follow certain conventions and always contains a WEB-INF directory. The WEB-INF directory must contain a web.xml file. The web.xml file is known as the deployment descriptor and contains configuration information. The WEB-INF directory usually has lib or class subdirectories containing its main Java code.

Running Web Applications

A web application runs inside an application server or servlet container. To run a web application, you deploy it to an application server, either as a WAR file or an EAR file. Theoretically, any web application could run in any application server on any platform, provided it is written to the Java Servlet API 3.0 specification. However, application servers vary and you should ensure your application server is supported with WebFOCUS. For more information on supported application servers, see [Web Server and Application Server Requirements](#) on page 35.

Accessing Web Applications

After it is deployed, the web application context root is used to access the application in a web browser. The context root is the directory name used to access a web application and is normally specified when you deploy a web application. A context root is sometimes referred to as a context path or a context.

For example, the default WebFOCUS context root is `/ibi_apps`. Therefore, you can access the web application using:

```
http://hostname:port/ibi_apps/signin
```

where:

```
hostname:port
```

Are the host name and HTTP port of the web server or application server. If you require SSL, use `https` instead of `http`.

A valid user name and password is required to access the WebFOCUS web application.

If your application server is separate from your web server, you must ensure that the web server can route requests to the application server. For example, when a request comes to the web server for `ibi_apps`, the web server must know to send the request to the application server. For some web and application server combinations, this occurs automatically, but others must be configured.

Security and User IDs for WebFOCUS and ReportCaster

This section provides a brief overview of default WebFOCUS security and authentication issues. These defaults can be changed using security exits and other features. In addition, your enterprise may require additional security and authentication for the web server, mail server, data sources, or other third-party components. For a complete discussion of WebFOCUS security, see the *WebFOCUS Security and Administration* manual.

By default, WebFOCUS uses two completely independent user ID types, although it is possible to synchronize them:

❑ **Managed Reporting and ReportCaster User IDs** (Front End)

All requests processed by the WebFOCUS Client require a user ID. For information on WebFOCUS security authentication and authorization, see the *WebFOCUS Security and Administration* manual.

❑ **WebFOCUS Reporting Server User IDs** (Back End)

The WebFOCUS Reporting Server has both user IDs to run reports and procedures (Execution IDs) and user IDs to administer and start the server (Administrator IDs). In addition, the WebFOCUS Reporting Server can run with different security providers.

Managed Reporting and ReportCaster IDs

A user has the same ID for Managed Reporting and ReportCaster. This ID determines which features, reports, and data are accessible through these products. By default, these IDs are created and maintained by a WebFOCUS administrator using the WebFOCUS Security Center.

When WebFOCUS is first installed, the default WebFOCUS administrator ID and password are both *admin*. After completely installing WebFOCUS and ReportCaster, an administrator should sign in as *admin*, update the password for the *admin* account, and create accounts for other users.

For information on integration with basic web server authentication or WebFOCUS Reporting Server security, see the *WebFOCUS Security and Administration* manual.

WebFOCUS Reporting Server Security Providers

Necessary IDs for the WebFOCUS Reporting Server depend on which security provider the server uses. Each time you start the WebFOCUS Reporting Server, you can specify a security provider that determines how authentication occurs when running reports and accessing the Web Console. The Web Console is a web-based tool for configuring and administering the WebFOCUS Reporting Server.

For more information, see the *Server Installation* manual.

You can run the server with:

Security ON

Security OFF

The following are the most common security providers, which are set through the Web Console:

OPSYS. Authentication is performed by the operating system of the WebFOCUS Reporting Server machine. Users are authenticated when running reports and when accessing the Web Console to configure the server.

PTH. Authentication is internal. User IDs and encrypted passwords are stored in a file created by the server:

```
/install_directory/ibi/profiles/admin.cfg
```

Users are authenticated only when accessing the Web Console to configure the server. Authentication is not required to run reports.

Security providers DBMS and LDAP are other options. For more information, see the *Server Administration* manual.

WebFOCUS Reporting Server User IDs

Regardless of security provider, there is a distinction between WebFOCUS Client execution IDs and server administrator IDs.

- ❑ **Execution IDs** are user IDs needed to run reports or applications. With security OFF or ON with provider PTH, no authentication is needed for these tasks. With security provider OPSYS, the authentication is performed by the operating system of the WebFOCUS Reporting Server machine. Since authentication is performed by the operating system, these IDs are not created, stored, or maintained through WebFOCUS.

With security provider OPSYS, when you run a report in a WebFOCUS application, the WebFOCUS Client must pass an execution ID to the server. End users can be prompted to provide this execution ID, or the WebFOCUS Client can automatically send a predetermined execution ID. For more information on configuring how the WebFOCUS Client provides execution IDs to the server, see [WebFOCUS Post-Installation Tasks](#) on page 117.

- ❑ **Server administrator IDs** are user IDs needed to start the server and access the Web Console. During the server installation, you are prompted for a PTH user ID and password to administer the server. After installation, you can change and add security providers and administrators through the Web Console. The server stores administrator IDs and encrypted passwords in:

`/install_directory/ibi/profiles/admin.cfg`

These server administrator user IDs and passwords are needed for the following:

- ❑ **Web Console Authentication.** With security providers OPSYS and PTH, only user IDs stored in the admin.cfg file can sign in to the Web Console as administrators. With security provider OPSYS, passwords are authenticated through the operating system. For security provider PTH, the server uses the passwords stored in the admin.cfg file.
- ❑ **Starting the Server.** With all security providers, only user IDs stored in the admin.cfg file have the authority to start the server. To start the server, a server administrator ID stored in admin.cfg must have the same name as an operating system user ID with full file permissions to the server directories.

Note: To access data sources needed for reports, the type of authentication is determined by how you configure the adapter for the data source, as explained in the *Server Administration* manual.



Chapter 2

WebFOCUS and ReportCaster Installation Requirements

This chapter lists requirements for installing and configuring WebFOCUS and ReportCaster on UNIX systems. If you are only installing WebFOCUS, the ReportCaster requirements are not needed.

Review the *WebFOCUS Release Notes* document for information on known issues and documentation updates.

In this chapter:

- [WebFOCUS and ReportCaster Installation Requirements](#)
 - [WebFOCUS Repository Setup](#)
 - [Database Collation Utility](#)
-

WebFOCUS and ReportCaster Installation Requirements

Release 8206 is a new feature release that supports new application development, includes incremental maintenance, and supports upgrade of content and applications.

Review the sections that follow to ensure that your machine or machines meet the necessary WebFOCUS and ReportCaster requirements.

JVM and J2SE Support Information

Release 8206 supports Java Virtual Machine (Java VM) Version 8 and Version 11 on the system that is hosting the application server where WebFOCUS and the ReportCaster Distribution Server are installed.

In addition, any supported portal server (for example, SAP Enterprise Portal Server, IBM WebSphere Portal Server, and so on) that is integrated with WebFOCUS Open Portal Services must be hosted on a system that is using Java VM Version 8 or Version 11.

Note: For information regarding WebFOCUS release support for the different Oracle JDK versions that WebFOCUS and ReportCaster web applications are installed, see *WebFOCUS Support Statement for Java 2 Platform, Standard Edition (J2SE)* at:

<https://kb.informationbuilders.com/topic/webfocus-support-statement-java-platform-standard-edition-java-se>

WebFOCUS and ReportCaster Machine Requirements

This table lists basic requirements for the machine or machines that run WebFOCUS and ReportCaster. Where necessary, these requirements are described in more detail later in this chapter. The minimum recommendations listed here are provided as a general guidance. Based on your business requirements, number of concurrent users, and resources used by your applications, you may choose to perform vertical, horizontal, or auto scaling to improve performance and ensure reliability. Contact Information Builders Customer Support for assistance with special configurations.

Item	Options or Requirements	Notes
Operating System	The WebFOCUS Client and ReportCaster are Java-based applications and supported on operating systems with Java Version 8 or Java Version 11 environments.	<p>The following are the operating systems on which the WebFOCUS Client and ReportCaster are certified and on which the WebFOCUS Reporting Server is supported and certified.</p> <ul style="list-style-type: none"> <input type="checkbox"/> IBM AIX 7 pSeries <input type="checkbox"/> HP-UX 11.31 IA64 <input type="checkbox"/> Linux Kernel-2.6.32 and 3.10.0 x86 <input type="checkbox"/> Linux Kernel-2.6.32 pSeries <input type="checkbox"/> Linux Kernel-3.0.101 and higher <input type="checkbox"/> Oracle Solaris 10 and 11 Sparc <input type="checkbox"/> Oracle Solaris 10 and 11 x86 <input type="checkbox"/> SUSE Linux Enterprise Server for IBM Z

Item	Options or Requirements	Notes
<p>Application Server/Servlet Container (WebFOCUS Client Machine)</p>	<p>Must meet both J2EE 6 web container and J2SE 7 specifications. This includes servlet API 3.0 specifications.</p> <p>Minimum heap size should be set to 2048.</p> <p>Maximum heap size can be set to 2048 or higher.</p> <p>The machine must have the available memory allocated through these settings.</p>	<p>In Release 8206, Apache Tomcat version 8.5.51 is provided and can be installed with WebFOCUS. For more information on Apache Tomcat™ and other supported application servers, see Web Server and Application Server Requirements on page 35.</p> <p>Note: In Release 8206, Tomcat 8 or higher is required.</p>
<p>Java (64-bit)</p>	<p>Java Version 8 or Java Version 11.</p>	<p>Note: Java Version 8 and Java Version 11 are supported.</p>
<p>Shell</p>	<p>Korn Shell (ksh).</p>	<p>WebFOCUS is tested and documented using ksh as the default sign in shell. WebFOCUS scripts require Korn Shell (ksh), which is not installed with Linux, by default.</p>
<p>Web Server (WebFOCUS Client Machine)</p>	<p>Must support aliasing.</p>	<p>See Web Server and Application Server Requirements on page 35 for certified web servers. If your application server has a robust HTTP component, the web server is optional.</p>

Item	Options or Requirements	Notes
WebFOCUS Repository	TCP/IP access to a Database Server. For JDBC drivers.	A WebFOCUS repository is required to store reports, scheduling, and all WebFOCUS data. You can use any supported database. For more information, see WebFOCUS Repository Setup on page 38.

Note:

- ❑ If you are using Tomcat included in the SUSE distribution, it is important to remove the log4j package that is automatically installed as a dependency with the Tomcat package, as this prevents the WebFOCUS web application (ibi_apps) from deploying. Run the following command to remove the log4j package:

```
rpm -e --nodeps $package
```

where:

```
$package
```

Is the name of the actual log4j package that is installed. The name can be determined by issuing the following command:

```
rpm -aq|grep log4j
```

- ❑ The installation program includes the following third-party components: Tomcat and Derby. Later versions or releases of these third-party components, which often contain fixes for security vulnerabilities, may exist at installation time. It is your responsibility to check the vendor sites listed below for updates to newer versions or releases of these third-party components if you intend to use them with WebFOCUS. Install the new updates or versions prior to proceeding with the WebFOCUS installation. If these components are installed through the WebFOCUS installation program, it is your responsibility to update these components after the installation is completed.
 - ❑ The latest version of Tomcat is available at <https://tomcat.apache.org>.
 - ❑ The latest version of Derby is available at <https://db.apache.org/derby>.

End User Machine Requirements

This section explains the desktop requirements for running WebFOCUS and ReportCaster.

Desktop Requirements

The following table lists requirements for machines from which end users or administrators can access WebFOCUS reports and applications. Not all requirements apply to all users and in many situations, only a web browser is required.

Item	Options or Requirements	Notes
Web Browser	Google Chrome™, Mozilla Firefox®, Microsoft Edge®, and Internet Explorer® 11 are supported.	For details on browser support, see the <i>WebFOCUS Release Guide</i> : https://techsupport.informationbuilders.com/tech/wbf/8206_relguide.pdf
Adobe Acrobat Reader	WebFOCUS 8.2 is certified with Adobe® Reader® X and Adobe Reader XI.	Acrobat is needed to view PDF reports generated by WebFOCUS.
Adobe Flash Player	WebFOCUS 8.2 is certified with Adobe® Flash® Player 10 and higher.	Required for the Active PDF report output format.

Disk Space Requirements

The following are disk space requirements for WebFOCUS components.

- Installation directory requires 10GB of free space.
- Temp directory requires 10GB of free space.

If the temp directory on the host does not meet the minimum size requirements, the InstallAnywhere environment variable IATEMPDIR can be set to use an alternate directory.

You may specify an alternate /tmp location by setting the following environment variable:

```
IATEMPDIR=/large_tmp
export IATEMPDIR
```

where:

`/large_tmp`

Is a user-defined path of a file system that has enough space.

System Resource Limits

The operating system provides ways of limiting the amount of resources that can be used. These limits can affect the installation process.

Use the `ulimit` command to set process memory-related resource limits for your session.

The WebFOCUS installation program requires `ulimit` to be set to 8192.

Limits can be *hard* or *soft*. Hard limits are set by the root user. Only the root user can increase hard limits, although other users can decrease them. Soft limits can be set and changed by other users, but they cannot exceed the hard limits. To view the current limits, enter the following command:

```
ulimit -a
```

Use the `/etc/security/limits.conf` file to store `ulimit` settings. Changes to this file should be made by a system administrator.

Communication Requirements

WebFOCUS uses TCP/IP for communications between components. During the installation, you choose which ports are used. Ensure that communications are possible on those ports.

Component	Number of Ports	Default Ports	Notes
WebFOCUS Reporting Server	4 consecutive ports	8120 (TCP) 8121 (HTTP) 8122 8123	When you install the WebFOCUS Reporting Server, you are prompted for the HTTP and TCP ports. The HTTP port is the first of three consecutive ports that the server uses. The TCP port is normally one less than the HTTP port.
WebFOCUS Client	Runs through web and application servers		For most features, the WebFOCUS Client does not require its own dedicated port and runs through the web and application servers. For Tomcat, ports 8080, 8009, and 8005 are used, by default.

Component	Number of Ports	Default Ports	Notes
ReportCaster Distribution Server	1 port	8200	When you install ReportCaster, you are prompted for this port. Additional ports may be needed when Workload Manager and/or Failover options are configured.

Web Server and Application Server Requirements

The following are the most common web and application servers certified with WebFOCUS and ReportCaster:

- IBM WebSphere application server.
- Oracle WebLogic 12c.
- Apache Tomcat 8.5.51.

Additional web and application servers are supported that meet the specifications described in [JVM and J2SE Support Information](#) on page 29. For additional support information, contact Customer Support.

Note: Depending on the level of usage, you may need to increase your application server Java memory options. See [Java Memory Issues](#) on page 151 for more information.

Information on configuring web and application servers appears in [Configuring Web and Application Servers](#) on page 87. Some installation information for Tomcat is also provided. For installation information on other application servers, refer to your application server documentation.

User ID Requirements for the WebFOCUS Reporting Server

If the WebFOCUS Reporting Server is not on UNIX, see the documentation for its platform and skip to [User ID Requirements for the WebFOCUS Client](#) on page 36.

The operating system user ID you use when installing the server will own the files and is the default server administrator. Server administrators are users that have permission to start and configure the server. You can create a new user ID to install and administer the server, or you can use any ordinary (non-superuser) ID. However, you should not install the server as root. Throughout this documentation, the name *admin* is used to refer to the server administrator ID and group, but you may use any name for this ID.

When running the server with security provider OPSYS, end users and applications are authenticated through the operating system when they need access to the server. Therefore, in addition to the *iadmin* ID, operating system IDs must be available for end users and applications to access the server. Server data access agents will impersonate these IDs before performing any file access on their behalf. For security purposes, you should not allow end users and applications to use the *iadmin* ID. The *iadmin* ID should be available only to users who require administrative privileges to the server.

User ID Requirements for the WebFOCUS Client

The WebFOCUS Client user ID and file permission requirements depend on your security needs, web server configuration, application server configuration, and the preferences of the system administrator.

Be aware that most WebFOCUS Client processing is done through the web and application servers. In addition, an ID (WebFOCUS ID) should be available to browse the file system, edit text files, and execute utilities. Therefore, you must determine which IDs are used for the following processes:

- Web Server ID.** ID that the web server uses when accessing static WebFOCUS files.
- WebFOCUS Client ID.** ID for installing WebFOCUS. This ID should not be root and will be known as `wf_user`.
- Application Server ID.** ID that the application server uses when running the WebFOCUS servlet. Often this is a single user ID.
- WebFOCUS ID.** ID that you will use to install WebFOCUS, browse the file system, edit text files, and execute utilities. This may be the same ID as the WebFOCUS Client ID (`wf_user`).

The simplest configuration uses the same ID for all of the above processes. To implement this, ensure web and application server processes use the same ID and then install the WebFOCUS Client using this ID. This ID should not be root.

In other configurations, multiple user IDs can be used. If you do not install using the same ID as the web and application server processes, after installation, you must set file permissions to ensure that these processes have access to the WebFOCUS Client directories. The easiest way to implement this is to create a group to own the WebFOCUS Client directories and add user IDs to this group. Then, after installation, change directory permissions to 775.

Note: Communication between the WebFOCUS Client and the WebFOCUS Reporting Server is through TCP/IP, not the file system. However, if the WebFOCUS Client and the WebFOCUS Reporting Server are installed on the same machine as the same user, they may share the same APPROOT directory, `/install_directory/ibi/apps`. If this is the case, both the WebFOCUS Client and Reporting Server processes require access to this directory.

User ID Requirements for the ReportCaster Distribution Server

The ReportCaster Distribution Server communicates with other WebFOCUS components using TCP/IP. Therefore, if you install the Distribution Server separately, you can use the same ID as other WebFOCUS components or a different ID entirely. Do not install or run the Distribution Server as root.

WebFOCUS and ReportCaster Machine Java Requirements

on the machine or machines that run the WebFOCUS Client and ReportCaster Distribution Server.

After the JDK is installed, the following directory must be in the PATH variable of any user IDs that run WebFOCUS components:

```
/java_home/bin
```

where:

```
java_home
```

Is the absolute path where the JDK is installed.

To test if Java is installed and in PATH, issue the following:

```
java -version
```

Information on the Java build should appear. For example:

```
java version "1.8.0_242"
Java(TM) SE Runtime Environment (build 1.8.0_242-b09)
Java HotSpot(TM) 64-Bit Server VM (build 25.45-b02, mixed mode)
```

To run the installation, the `jar` and `javac` commands must be in your search PATH. You can type the following to determine if they are found:

```
type jar
```

For IBM JDK, refer to your IBM documentation for additional information. The ReportCaster Distribution Server will use whichever Java VM is in its PATH variable. ReportCaster web components use the Java VM of the application server. Refer to your application server documentation if you need to update its Java VM.

Note: For most purposes, the terms JDK and SDK are synonymous. A JRE contains a subset of the JDK components.

ReportCaster Distribution Requirements

The following communication requirements are necessary to schedule and distribute reports:

- Email distribution requires TCP/IP communication to an SMTP-enabled mail server that supports base-64 encoding for MIME type attachments.
- FTP distribution requires TCP/IP communication to an FTP server.
- Printer distribution requires a networked printer accessible to the ReportCaster Distribution Server.
- Managed Reporting distribution requires TCP/IP communications to the WebFOCUS Client machine.

Note: The ReportCaster web components and the ReportCaster Distribution Server need a common time zone for proper operation. Therefore, if ReportCaster components run on different machines, all machines must be in the same time zone.

WebFOCUS Repository Setup

The ReportCaster repository structure has changed from previous 7.7.x releases and is now a part of the WebFOCUS repository. Therefore, you cannot use a repository from an early release without migrating its contents or creating a new repository. The ReportCaster tables in WebFOCUS 8.2 are now part of the WebFOCUS repository, and a database repository must store ReportCaster scheduling data. If you want to use the Report Library, the database can be any supported database with an available JDBC driver.

Depending on the platform used, the WebFOCUS Repository can be stored in a Derby, Microsoft SQL Server, Oracle, Db2, MySQL®, or PostgreSQL database. For more information, see *Installing the WebFOCUS Client* on page 47.

Repository Options

Review the information below and decide on the database server to use.

Note: Versions of supported databases and drivers certified are posted on:

<https://kb.informationbuilders.com/topic/supported-rdbms-and-drivers>

- Db2.** To use a Db2 repository, a Db2 JDBC driver must be on the machine or machines that run the WebFOCUS Client and the ReportCaster Distribution Server.

Note:

- ❑ The Db2 collation must be set to case sensitive for the WebFOCUS database. Case-insensitive collation is not supported.
- ❑ If you are using Db2 as the WebFOCUS Repository, the database needs to be created with a pagesize of 32K.

For more information on using a Db2 repository, see [Additional WebFOCUS Repository Topics and Tasks](#) on page 173.

- ❑ **Derby.** If you choose, Derby can be installed with WebFOCUS. If you are also installing Tomcat, the required JDBC driver (derbyclient.jar) will be added to the Tomcat configuration file.
- ❑ **Microsoft SQL Server.** To use SQL Server, the appropriate SQL Server JDBC driver must be on the machine or machines that run the WebFOCUS Client and the ReportCaster Distribution Server. You can download and install the specific driver from the Microsoft website.

If you are unfamiliar with the JDBC driver and its requirements, information is provided in [Additional WebFOCUS Repository Topics and Tasks](#) on page 173.

Requirements:

- ❑ The repository database must be created by a DBA prior to installing and configuring WebFOCUS.
- ❑ The database collation must be set to case sensitive. Case-insensitive collation is not supported.
- ❑ At installation, upgrade, or configuration time, the account used by the WebFOCUS installation process to connect to the repository database must be granted db_datawriter, db_datareader, and db_ddladmin roles on the repository database and schema. Alternatively, the object creation and initial data load may be run as a separate utility by a DBA.
- ❑ For normal run-time activity, the account used by WebFOCUS to connect to the repository database must be granted db_datawriter and db_datareader roles on the repository database and schema.
- ❑ **MySQL.** To use a MySQL Server repository, the MySQL driver should be installed on the machine or machines that run the WebFOCUS Client and the ReportCaster Distribution Server. This is typically named mysql-connector-java-*nn*-bin.jar, where *nn* is the version number. [MySQL Repository Set Up](#) on page 183 contains information on installing and configuring the MySQL database server and this driver.

Note:

- The collation for MySQL must be set to case sensitive for the WebFOCUS database. Case-insensitive collation is not supported.
- The default character set and collation for MySQL is latin1 and latin1_swedish_ci, so non-binary string comparisons are case insensitive, by default.
- For use with WebFOCUS, the collation needs to be set as latin1_general_cs or latin1_swedish_cs, depending on the character set required.
- WebFOCUS Release 8.2 does not support the MySQL utf8 encoding character set.
- Oracle™.** To use an Oracle repository, the Oracle JDBC™ Thin Client 9.0.1 driver must be on the machine or machines that run the WebFOCUS Client and the ReportCaster Distribution Server. This is typically named ojdbc7.jar depending on the Java release.

Note:

- The WebFOCUS repository requires character semantics. When creating a database for use with WebFOCUS, it needs to be done with CHAR semantics. This is applicable when using the following character sets:
 - UTF8
 - JA16SJISTILDE - Japanese
 - ZHS16CGB231280 - Simplified Chinese
 - ZHT16BIG5 - Traditional Chinese
 - KO16KSC5601 - Korean

This is not needed when using the following character sets:

- Western European: WE8ISO8859P15 or WE8MSWIN1252
- Eastern European: WE8ISO8859P2 or EE8MSWIN1250
- Oracle database blocks (db_block_size) require 8K or higher.
- The maximum number of open cursors (open_cursors) must be set to 500 or higher when all tables are created and inserted.
- Tablespace requirements depend on customer usage.
- WebFOCUS requires case-sensitive collation. For Oracle, string comparisons are case sensitive, by default.

- ❑ Comparison and sort can be configured through the sort system parameters NLS_COMP and NLS_SORT.
- ❑ The RDBMS user account privileges used by WebFOCUS need to have the ability to create tables, modify tables, execute queries, and insert and delete records.
- ❑ **PostgreSQL.** Requires the JDBC 4.2 driver. In the WebFOCUS install.cfg file, the IBI_REPOS_DB_URL setting, which contains the JDBC connection path for the database, should be modified and the *currentSchema* parameter should be added to the URL.

For example:

```
IBI_REPOS_DB_URL=jdbc:postgresql://localhost:5432/myDatabase
?currentSchema=mySchema
```

where:

mySchema

Is a string identifying the schema name for the specified database user.

The schema will be used to resolve the fully qualified name of the table provided by the JDBC driver for the specific connection.

- ❑ **Other JDBC-Compliant Databases.** To use other JDBC-compliant databases, you need their JDBC drivers. You must also know the JDBC Path to connect to the database.

For more information about repositories, see [Additional WebFOCUS Repository Topics and Tasks](#) on page 173.

WebFOCUS Repository Pre-Installation Tasks

During the WebFOCUS installation, you are prompted for information that WebFOCUS and ReportCaster need to access your repository. After WebFOCUS receives this information, you can use the WebFOCUS utilities to create repository tables and perform other repository-related tasks.

Additional information on ReportCaster repositories is available in [Additional WebFOCUS Repository Topics and Tasks](#) on page 173.

Procedure: How to Prepare for a WebFOCUS Repository

For additional background information and sizing guidelines for Db2 on z/OS, see [Additional WebFOCUS Repository Topics and Tasks](#) on page 173.

Ask your DBA to perform the following tasks:

1. Install the JDBC driver for your WebFOCUS repository database on the WebFOCUS Client and ReportCaster Distribution Server machine or machines. You will be prompted for the path to the driver during the WebFOCUS and ReportCaster installation.
2. Create or assign a user ID and password that will own the repository. You will be prompted for this information during the WebFOCUS and ReportCaster installation.
3. If applicable, create a database within your database server for the WebFOCUS repository and ensure the user ID you created is the database owner. You will need the name of this database during the ReportCaster installation.

You can optionally create tablespaces for the repository. For sizing guidelines, see [Sizing Guidelines](#) on page 181.

Note: Database collation must be case sensitive for WebFOCUS. The installation program and the database load utilities check for the database collation. For Microsoft SQL Server and MySQL, if a case-insensitive database is detected, the installation attempts to change the database collation to the best matched case sensitive (CS) collation. If the collation change fails, a message displays and the database creation does not take place. You can do either of the following:

- Continue with the installation and correct the database collation post-install. Then, run the WFRposUtilCMDLine.
- Exit the installation, correct the database collation, and rerun the installation.

Database Collation Utility

Starting with WebFOCUS Release 8.2 Version 02, the db_collation.sh script is available and located in the *install_directory/ibi/WebFOCUS82/utilities/dbupdate/collation/* directory.

This utility is supported with MS SQL Server and MySQL databases and enable you to change the database collation from case insensitive to case sensitive.

The script provides the available options:

check_cs_collation

- Checks if the database collation is case sensitive.
- Prompts the user to use the database configured in install.cfg (select Y) or use a different database instance (select N).

- Prompts for the database repository ID and password.
- Prompts for the connection information, if the database configured with the installation is not being used.

Output example:

```
[2017-11-21 17:08:53,729] INFO stdout - Starting
collation_tool(check_cs_collation) process ...
[2017-11-21 17:08:54,278] OFF stdout - Database collation is NOT case
sensitive or does not meet WebFOCUS requirements
Or
[2017-12-13 12:41:11,117] INFO stdout - Starting
collation_tool_install(check_cs_collation) process ...
[2017-12-13 12:41:11,831] OFF stdout - Database collation is case sensitive
[2017-12-13 12:41:11,831] INFO stdout - Done
Database IS case sensitive
```

collation change

- Changes the database collation to the best matched CS collation.
- Prompts the user to use the database configured in install.cfg (select Y) or use a different database instance (select N).
- Prompts for the database repository ID and password.
- Prompts for the connection information, if the database configured with the installation is not being used.

Output example:

```
[2017-12-05 13:26:53,714] INFO stdout - Starting
collation_tool_install(collation_change) process ...
[2017-12-05 13:26:55,081] OFF stdout - Collation changed.
```

get_current

- Retrieves database collation.
- Prompts the user to use the database configured in install.cfg (select Y) or use a different database instance (select N).
- Prompts for the database repository ID and password.
- Prompts for the connection information, if the database configured with the installation is not being used.

Output example:

```
[2017-11-21 09:53:58,559] INFO stdout - Starting
collation_tool_install(get_current) process ...
[2017-11-21 09:53:59,403] OFF stdout - Database collation:
'Latin1_General_CS_AS'
```

list_cs_collations

- Lists all case sensitive collations supported by the database.
- Prompts the user to use the database configured in install.cfg (select Y) or use a different database instance (select N).
- Prompts for the database repository ID and password.
- Prompts for the connection information, if the database configured with the installation is not being used.

Output example:

```
...
"SQL_Latin1_General_CP1251_CS_AS","Latin1-General, case-sensitive, accent-
sensitive, kanatype-insensitive, width-insensitive for Unicode Data, SQL
Server Sort Order 105
on Code Page 1251 for non-Unicode Data","1251"
"SQL_Latin1_General_CP1253_CS_AS","Latin1-General, case-sensitive, accent-
sensitive, kanatype-insensitive, width-insensitive for Unicode Data, SQL
Server Sort Order 113
on Code Page 1253 for non-Unicode Data","1253"
"SQL_Latin1_General_CP1254_CS_AS","Turkish, case-sensitive, accent-
sensitive, kanatype-insensitive, width-insensitive for Unicode Data, SQL
Server Sort Order 129
on Code Page 1254 for non-Unicode Data","1254"
"SQL_Latin1_General_CP1255_CS_AS","Latin1-General, case-sensitive, accent-
sensitive, kanatype-insensitive, width-insensitive
..."
```

list_cs_compatible_collations

- Retrieves the list of CS collations compatible with the specified collation.
- Prompts the user to use the database configured in install.cfg (select Y) or use a different database instance (select N).
- Prompts for the database repository ID and password.
- Prompts for the connection information, if the database configured with the installation is not being used.

Output example:

```
[2017-11-21 10:29:31,566] INFO stdout - Starting
collation_tool_install(list_cs_compatible_collations) process ...
COLLATION_NAME,COLLATION_DESCRIPTION,CHARACTER_SET/CODE_PAGE
-----
"Japanese_90_CS_AS_KS_WS_SC","Japanese-90, case-sensitive, accent-
sensitive, kanatype-sensitive, width-sensitive, supplementary
characters", "932"
```

Note: To run the utility on UNIX, open a UNIX shell, navigate to the directory with the script, run `db_collation.sh`, and enter a selection to proceed.

Possible Errors When Running Scripts

- Connection failure due to bad credentials:

```
...
[2017-11-21 09:55:16,837] OFF stdout - Tool
'collation_tool_install(check_cs_collation)' FAILED to connect to
database : ERROR_REPOSITORY_JDBC_AUTHENTICATION_FAILED .
...
Caused by: com.microsoft.sqlserver.jdbc.SQLServerException: Login failed
for user 'yyy'.
...
```

- Connection failure due to invalid JDBC driver info:

```
Caused by: com.ibi.dbtools.errors.DbException [FEATURE_NOT_IMPLEMENTED]:
No collation tool available for provider C:\ibi\jdbc\sqljdbc42.jar
```

- Connection failure due to bad credentials or connection info:

```
Caused by: com.ibi.dbmigration.errors.DbMigrationException
[GENERIC]: Cannot connect to database [sqlserver://
DP03423-1:1433;DatabaseName=ci_test]
using provided credentials and jdbc driver [C:\ibi\jdbc\sqljdbc42.jar]
```


Installing the WebFOCUS Client

This section describes how to install the WebFOCUS Client on UNIX.

In this chapter:

- [Installing the WebFOCUS Reporting Server](#)
 - [Installing the WebFOCUS Cluster Manager](#)
 - [Installing the WebFOCUS Client](#)
 - [Upgrading From an Earlier 8.2.x Release to Release 8206](#)
 - [Migrating Configuration Files from Release 8.1 Version 05M to Release 8206](#)
 - [Upgrading Content From Release 8.1.x or 8.0.x to Release 8206](#)
 - [Upgrading In Place from Release 8.1 Version 05M to Release 8206](#)
 - [Performing a New Release 8206 Installation Using an Existing 8.2.x WebFOCUS Repository](#)
 - [Creating the WebFOCUS UOA Repository](#)
 - [Configuring Web and Application Servers](#)
 - [WebFOCUS Client and ReportCaster Directory Structures](#)
 - [Uninstalling the WebFOCUS Client](#)
-

Installing the WebFOCUS Reporting Server

Note: WebFOCUS requires a WebFOCUS Reporting Server, which provides data access, translation, computation, formatting, and other back-end processes. For information on installing the WebFOCUS Reporting Server, see the *Server Installation* manual.

Installing the WebFOCUS Cluster Manager

Cluster Manager (CLM) does not have a separate installation. Instead, the Reporting Server installation is used to install a second instance of the Reporting Server, which is then enabled for CLM. Follow the documented installation instructions in the *Server Installation* manual to install both the Reporting Server and CLM.

Installing the WebFOCUS Client

This following procedure provides the steps for installing the WebFOCUS Client on UNIX.

Note: Before beginning the installation, verify that all prerequisites are met. In particular, this installation requires knowledge of the Primary ReportCaster Distribution Server machine name and port number.

Procedure: How to Install the WebFOCUS Client (Console Installation Mode)

This section describes how to install WebFOCUS Client on UNIX using the console installation mode. For demonstration purposes, a custom installation is performed using an Oracle 12c database for the repository. The web and application server being used is Apache Tomcat 8.5.51, which is packaged with the installation.

Note: Before you run the WebFOCUS Client installation, set the ulimit on the user ID that is going to run the installation program as follows:

```
ulimit=8192
```

1. Download the WebFOCUS 8.2 installation file for UNIX (installWebFOCUS8206.bin).
2. Change the permissions of the installer file (installWebFOCUS8206.bin) to read and execute with the following command:

```
chmod 755 installWebFOCUS8206.bin
```

3. Execute the installer file with the following command:

```
./installWebFOCUS8206.bin -i console
```

The Choose locale prompt displays.

4. Select the appropriate language for the installation.

The Welcome to WebFOCUS 8.2 message displays.

5. Press Enter to continue.

The License Agreement displays.

6. Press Enter to move through the license information.

7. At the DO YOU ACCEPT THE TERMS OF THIS LICENSE AGREEMENT prompt, type Y and press Enter.
8. At the *I agree to Information Builders, Inc. collecting usage metrics* prompt, type Y to enable Information Builders to receive usage metrics on the volume and use of features and functions to be analyzed through an analytics provider.

Note:

- Usage metrics are available to you upon making a request to Customer_Support@ibi.com.
 - You may opt out at a later time, by turning the Usage Analytics setting off from the WebFOCUS Administration Console.
9. Press Enter to continue.
The Choose Install Type prompt is displayed.
 10. Type one of the following:
 - 1 to update an existing Release 8.2.x installation available on your machine. After entering a valid installation location, you are prompted to provide WebFOCUS Administrator credentials. This is used to import new roles and new portal page templates into the WebFOCUS repository. For this to be successful, the database must be running. The installation validates the connection to the database and the credentials to ensure that they have permission to perform the import of the Change Management packages that load the roles and templates.
The Pre-Installation Summary displays. Continue to Step 27.
 - 2 for a full installation and press Enter. Continue to Step 11.
 11. At the WebFOCUS License Code prompt, type your license code and press Enter to continue.
 12. At the WebFOCUS Site Code prompt, type your site code and press Enter to continue.
The Choose Install Set prompt is displayed.
 13. Type 2 for a custom installation and press Enter.
The Choose Destination Locations prompt is displayed.
 14. Press Enter to accept the default destination directory, or type a custom destination directory and then press Enter.

Note: Do not include spaces in the path.

The Select Components to Install prompt is displayed.

15. To install a component, type *Y* or press Enter. To not install a component, type *N*.
 - a. Type *Y* to install WebFOCUS or *N* to cancel.

The destination directory prompt is displayed.
 - b. Press Enter to accept the default destination, or type a destination path and press Enter.

Note: The directory path cannot contain spaces.

The mail server host prompt is displayed.
 - c. Type the mail server host name and press Enter.

The Install ReportCaster Distribution Server prompt is displayed.
 - d. Type *Y* to install the ReportCaster Distribution Server the same machine, or *N* not to install it.

Note: If you plan to install the Distribution Server on a different machine, type *N*.

The Install and Configure Tomcat prompt is displayed.
 - e. Type *Y* to install Tomcat or *N* to skip it. If you install Tomcat, you will be prompted for a destination directory. Press Enter to accept the default destination, or type a destination path and press Enter.

The Install Derby prompt is displayed.
16. Type *Y* to install Derby or *N* to configure an existing database.

A list of supported databases is displayed.

Note:

 - ❑ If you want to use an existing WebFOCUS repository that already has tables defined, clear the *Create WebFOCUS Repository* option. After the installation is completed, you must drop and recreate the existing tables in the repository if you plan on working with a new WebFOCUS repository. Alternatively, you can run the `WFReposUtilCMDLine.sh` file with the `CREATE_INSERT` mode to update your database and create the required tables and columns.
 - ❑ If you select the *Create WebFOCUS Repository* option, you will be prompted for WebFOCUS administrator credentials. The credentials that you enter will become the WebFOCUS administrator credentials. During the database creation, the user name and password supports ASCII characters from 32 to 126 and cannot include the following characters: double quotation marks (") or dollar sign (\$). Refer to the ASCII character table to determine the characters to use for the WebFOCUS administrator credentials. For more information, see the following website:

[https://msdn.microsoft.com/en-us/library/60ecse8t\(v=vs.71\).aspx](https://msdn.microsoft.com/en-us/library/60ecse8t(v=vs.71).aspx)

The password for the user name must be between four and 20 characters. Leading blanks and trailing blanks will be removed. You will not be prompted for credentials if the *Create WebFOCUS Repository* option is not selected.

- If you select the *Create WebFOCUS Repository* option, the installation checks the database to see if it contains existing tables. If it contains tables, the *Create WebFOCUS Repository* option will not be performed and a message displays. In this case, you can:
 - Provide information for a new empty database.
 - Post-installation, create the tables using the `WFReposUtilCMDLine` WebFOCUS utility. For more information, see [WebFOCUS Repository Table Creation](#) on page 129.
 - In the case you are performing a new installation and pointing to a database created in an earlier 8.2.x release, follow the post-installation steps required to update the database to a Release 8206 level. For more information, see [Performing a New Release 8206 Installation Using an Existing 8.2.x WebFOCUS Repository](#) on page 76.
- If you want to use a web or application server other than Apache Tomcat, then uncheck the *Configure Apache Tomcat* option. The *Configure WebFOCUS Client* area will appear and you must enter the port number that is currently used by your web server in the corresponding field.

The database choices are:

- 1 - Apache Derby
 - 2 - DB2
 - 3 - MYSQL
 - 4 - Microsoft SQL Server
 - 5 - Oracle
 - 6 - Other DB
- a. Type the option number for your database (for example, 5 for Oracle). The prompt to create a WebFOCUS Repository is displayed.
 - b. Type *N* and press Enter.

17. For example, for prompts using an Oracle database, type values for the following parameters and press Enter, or press Enter to accept the default.
 - DB Server Node.** Type the name of the machine where the Oracle Database Server is running.
 - Port.** The default is 1521. Type the port number on which the Oracle Database Server is listening on.
 - User Id.** This is used to communicate to the UOA repository.
 - Password.** Type the password for the user ID.
 - ORASID.** Type the value for the Oracle SID.
 - JDBC Driver.** Accept the default value, oracle.jdbc.OracleDriver.
 - JDBC Path.** Type the fully qualified path to the Oracle JDBC driver, including the jar file name.
18. At the double colon prompt (::), press Enter to continue.

The Advanced Configuration prompts display.
19. At the WebFOCUS Application Context prompt, type a context root and press Enter, or press Enter to accept the default (ibi_apps).
20. At the WebFOCUS Help Context prompt, type a help context root and press Enter, or press Enter to accept the default (ibi_help).
21. At the WebFOCUS Reporting Server Host prompt, type a host name and press Enter, or press Enter to accept the default.
22. At the WebFOCUS Reporting Server Port prompt, type a server port and press Enter, or press Enter to accept the default (8120).
23. At the Distribution Server Host prompt, type a host name and press Enter, or press Enter to accept the default.
24. At the Distribution Server Port prompt, type a server port and press Enter, or press Enter to accept the default (8200).
25. Start Distribution Server (Y/N): N

This prompt will appear for license keys with ReportCaster, and if you chose to install ReportCaster on this machine.
26. Tomcat HTTP Port: (DEFAULT: 8080):

Tomcat Server Shutdown Port: (DEFAULT: 8009):

Tomcat AJP Port: (DEFAULT: 8005):

The Tomcat prompts will appear if you choose to install and configure Tomcat during installation.

The Pre-Installation Summary prompt for the Distribution Server, Reporting Server, Database, Tomcat, Context Roots and Alias, and Mail Host is displayed, as well as Disk Space information.

Note: If any of the Advanced Configuration parameters are incorrect, type *BACK* to reenter values for the settings.

27. Press Enter to complete the installation.

The Installation Complete prompt is displayed once the installation has finished.

28. Press Enter to exit from the installer.

Procedure: How to Install the WebFOCUS Client Using the GUI Installation Mode

This section describes how to perform an installation for the WebFOCUS Client on UNIX using the GUI installation mode.

To use the GUI installation, ensure that the installer has access to an X Windows Server, through the DISPLAY variable. If an X Windows Server is available, you must set a DISPLAY environment variable before you start the installer. For example:

```
DISPLAY=xserver_host:0.0
export DISPLAY
TERM=xterm
export TERM
```

where:

xserver_host

Is the host name or IP Address of a machine that is running an X Server.

1. Download and launch the WebFOCUS 8.2 installation file for UNIX (installWebFOCUS8206.bin).
2. Run the installation program using one of the following commands:

```
installWebFOCUS8206.bin -i gui
installWebFOCUS8206.bin -i swing
```

3. Follow the installation prompts presented in the installation program.

Installation options presented through the graphical mode installation are the same as the steps documented in [How to Install the WebFOCUS Client \(Console Installation Mode\)](#) on page 48.

Procedure: How to Install a Stand-Alone ReportCaster Distribution Server

Note: The WebFOCUS Client must be installed before running the stand-alone ReportCaster Distribution Server installation.

To install a stand-alone ReportCaster Distribution Server on a separate machine from the WebFOCUS Client:

1. Sign in to the machine from which the installation will be invoked.

Note: The installer file (installWebFOCUS8206.bin) must be accessible from this machine.

2. Create a work directory and change to that directory.
3. Execute the installer file, using the following command:

```
./installWebFOCUS8206.bin -i console
```

The installation will provide a series of command-line prompts.

4. Select the appropriate language for the installation.
The WebFOCUS License Agreement displays.
5. Press Enter to move through the license information.
6. At the DO YOU ACCEPT THE TERMS OF THIS LICENSE AGREEMENT prompt, type Y and press Enter.
7. At the *I agree to Information Builders, Inc. collecting usage metrics* prompt, type Y to enable Information Builders to receive usage metrics on the volume and use of features and functions to be analyzed through an analytics provider.

Note:

- Usage metrics are available to you upon making a request to Customer_Support@ibi.com.
- You may opt out at a later time, by turning the Usage Analytics setting off from the WebFOCUS Administration Console.

8. Press Enter to continue.
The Choose Install Type prompt is displayed.
9. At the Choose Install Type prompt, type 2 for Full Install and press Enter.
10. At the WebFOCUS License Code prompt, type in your license code and press Enter to continue.
11. At the WebFOCUS Site Code prompt, type in your site code and press Enter to continue.
12. At the Choose Install Set prompt, type 2 for a custom installation and press Enter.

13. At the Choose Destination Locations prompt, type a destination folder for the installation and press Enter, or press Enter to accept the default.

Note: Do not include spaces in the path.

14. At the Select Component to Install prompt, type *Y* or *N* and press Enter for each of the following components, or press Enter to accept the default (*Y*).

Install WebFOCUS. Type *N*.

Install ReportCaster Distribution Server. Type *Y*.

The installer will display the message:

You have chosen to install ReportCaster Distribution Server only, WebFOCUS will not be installed

Select an existing database from the list of databases provided. Select the same database which the WebFOCUS Client will be using.

In the Database Configuration pane, provide the necessary information for the existing database.

15. Press Enter to continue the installation.

The Advanced Configuration prompts display.

16. At the Distribution Server Host prompt, type a host name and press Enter, or press Enter to accept the default.
17. At the Distribution Server Port prompt, type a server port and press Enter, or press Enter to accept the default.
18. At the Start Distribution Server prompt, type *N* and press Enter.

The configurations for the Distribution Server and Database are displayed.

Note: If any of the Advanced Configuration parameters are incorrect, type *back* to reenter values for the settings.

19. Press Enter to complete the installation.

Procedure: How to Install WebFOCUS Client Using the Silent Install

To record a UNIX silent installation in GUI mode:

1. X WINDOW DISPLAY must be exported, pointing to a valid X WINDOW machine.

The installer GUI interface will open on the exported \$DISPLAY machine. If \$DISPLAY is not defined, the installation should default to Console mode.

2. Navigate to the location of the WebFOCUS installation file.

3. Run the following script:

```
./installWebFOCUS8206.bin -i swing -r absolute_path/name.properties
```

For example:

```
./installWebFOCUS8206.bin -i swing -r /home/myid/  
silent_install.properties
```

To record a UNIX silent installation in Console mode:

1. Navigate to the location of the WebFOCUS installation file.
2. Run the following script to enforce running in Console mode:

```
./installWebFOCUS8206.bin -i console -r absolute_path/name.properties
```

For example:

```
./installWebFOCUS8206.bin -i console -r /home/myid/  
silent_install.properties
```

To playback a UNIX silent installation:

1. Review the generated properties file before performing the silent installation to ensure that the properties are correct.
2. Navigate to the location of the WebFOCUS installation file.
3. Run the following script:

```
./installWebFOCUS8206.bin -i silent -f absolute_path/name.properties
```

For example:

```
./installWebFOCUS8206.bin -i silent -f /home/myid/  
silent_install.properties
```

Troubleshooting the Installation

If you experience issues during the installation, due to Java memory resources:

1. Set the following environment variable from the command line, or optionally, set it globally in a profile:

```
_JAVA_OPTIONS="-Xms1024m -Xmx2048m" ; export_JAVA_OPTIONS
```

The memory allocated through this command must be available on your system.

2. Run the installation program.

Upgrading From an Earlier 8.2.x Release to Release 8206

Due to changes in the WebFOCUS Release 8.2 repository database structure, a database update is required to enable you to use an existing Release 8.2.x database with Release 8206.

Upgrade Installation Steps

The database update is performed during the upgrade installation. The installation checks the database version used for the WebFOCUS repository to determine if a database update is required.

- ❑ If a database update is required, the `db_inplace_update.sh` utility runs, using the credentials configured with the installation.

If the database update was successful, the following information is entered in the installation log:

```
Update process SUCCEEDED
```

Note: Credentials used for the database update utility need privileges to allow table changes.

- ❑ If the database update fails, the WebFOCUS web application does not start and you are not able to connect to WebFOCUS. This can occur if the connection to the database is not available. In this case, you need to review the installation log and the WebFOCUS event log for more information, and manually run the `db_inplace_update` utility post-installation.

The following are examples of failures captured in the installation log file:

```
Version checker process FAILED to connect to database
ERROR:connecting to DB, DBCHECK:connect_error-not going to execute:
/home/user/ibi/WebFOCUS82/utilities/dbupdate/db_inplace_update.sh
```

The following is an example of a failure captured in the WebFOCUS event.log file:

```
ERROR_DB_NOT_UP_TO_DATE Database is not up to date. Please run the
update utility first.
```

For more information on how to manually run the `db_inplace_update` utility post-installation, see [How to Manually Run the Database Utility Post-Installation](#) on page 59.

- ❑ The `update_repos` utility runs automatically. This utility imports the following Change Management packages:
 - ❑ `managers_group_and_rules.zip`
 - ❑ `bip_page_templates_Vnn.zip`, where `nn` is the version of the package.

- ❑ roles.zip
- ❑ pgx_page_templates_Vnn.zip, where *nn* is the version of the package.
- ❑ themes_Vnn.zip, where *nn* is the version of the package.

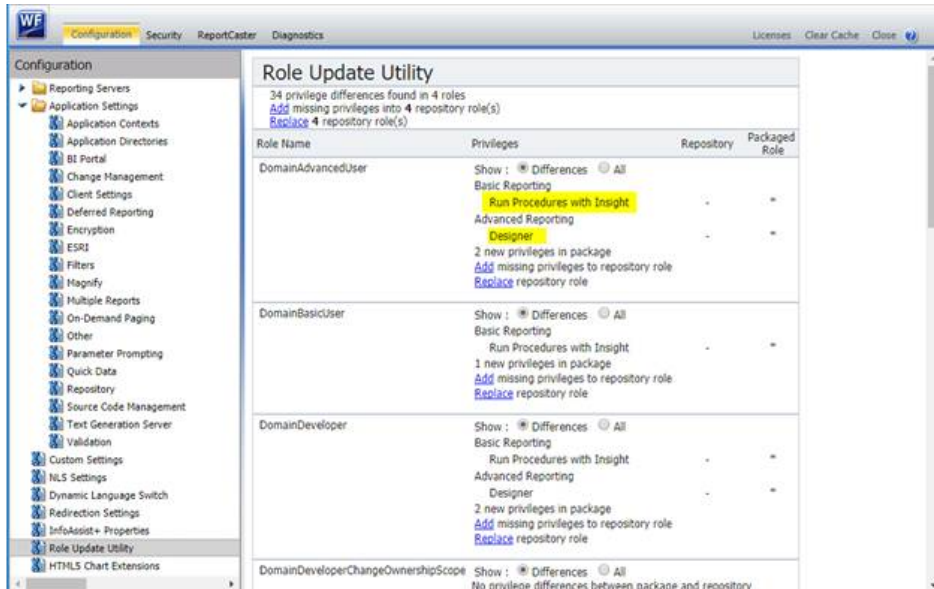
You are prompted for WebFOCUS Administrator credentials during the installation. If communication to the database is not available, or the provided credentials do not have permissions to import Change Management packages, you must manually run the `update_repos` utility post-installation. See step 6 in [How to Manually Run the Database Utility Post-Installation](#) on page 59.

Note: This step is required for all Release 8.2.x upgrades to Release 8206.

- ❑ Use the Role Update Utility available in the WebFOCUS Administration Console to update repository roles and privileges. The utility enables you to identify differences between roles and privileges available in your existing repository and the new roles and privileges provided with the new installation.

It is recommended that you replace your repository with new roles and privileges to use new functionality and features.

The following is an example using a WebFOCUS Release 8.2 Version 01M repository and upgrading to Release 8206. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access WebFOCUS Designer.



1. Sign in to WebFOCUS as an administrator.
2. Click the User menu in the upper-right corner, point to *Administration*, and then click *Administration Console*.
3. In the Configuration panel, click *Role Update Utility*.

At the top of the table, you will see a message that identifies new roles and high-level differences between your existing roles.

4. Examine the differences between the Repository and Packaged roles and privileges and apply the new roles and privileges to enable new functionality and features.

Procedure: How to Manually Run the Database Utility Post-Installation

1. Ensure that the database is running.
2. Run the `db_inplace_update.sh` utility. The `db_inplace_update` database utility is stored in the `/home/user/ibi/WebFOCUS82/utilities/dbupdate` folder.

Note: The application server should not be running when running the database update utility.

A Command window opens and is used to run the database update utility.

3. Type the database repository user name and password, when prompted.
Note: Credentials used for the database update utility need privileges to allow table changes.
4. After a successful database update, clear the application server cache and then start the application server.
5. Confirm that the connection to WebFOCUS is functional and that the content is correct.
6. Run the following utility to update roles and user groups, and include new templates that are available for portal development:

```
/home/user/ibi/WebFOCUS82/utilities/WFReposUtil/update_repos.sh
```

You will get prompted to provide WebFOCUS administrator credentials.

This utility imports the following Change Management packages:

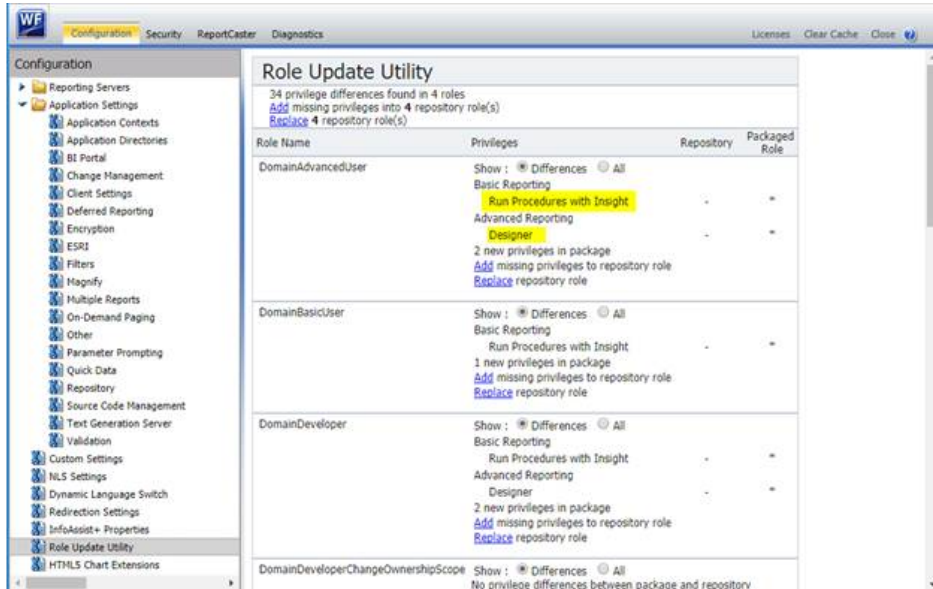
- /home/user/ibi/WebFOCUS82/features/bip/managers_group_and_rules.zip
- /home/user/ibi/WebFOCUS82/features/bip/bip_page_templates_Vnn.zip, where *nn* is the version of the package.
- /home/user/ibi/WebFOCUS82/features/bip/pgx_page_templates_Vnn.zip, where *nn* is the version of the package.
- /home/user/ibi/WebFOCUS82/features/bip/themes_Vnn.zip, where *nn* is the version of the package.
- /home/user/ibi/WebFOCUS82/features/roles/roles.zip.

Logs are created in the /home/user/ibi/WebFOCUS82/application_logs folder under the following names:

- cm_import_bip_page_templates_<date_time>.log
 - cm_import_managers_group_and_rules_<date_time>.log
 - cm_import_themes_Vnn_<date_time>.log
 - cm_import_pgx_page_templates_Vnn_<date_time>.log
 - cm_import_roles_<date_time>.log
 - cm_import_managers_group_and_rules_<date_time>.log
7. Use the Role Update Utility available in the WebFOCUS Administration Console to update repository roles and privileges. The utility enables you to identify differences between roles and privileges available in your existing repository and the new roles and privileges provided with the new installation.

It is recommended that you replace your repository with new roles and privileges to use new functionality and features.

The following is an example using a WebFOCUS Release 8.2 Version 01M repository and upgrading to Release 8206. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access WebFOCUS Designer.



- Sign in to WebFOCUS as an administrator.
- Click the User menu, point to *Administration*, and then click *Administration Console*.
- In the Configuration panel, click *Role Update Utility*.

At the top of the table, you will see a message that identifies new roles and high-level differences between your existing roles.

- Examine the differences between the Repository and Packaged roles and privileges and apply the new roles and privileges to enable new functionality and features.

Reference: Troubleshooting the Upgrade Installation

- ❑ If the database update fails, you must ensure that the database is running and that the db owner is allowed to make changes to the database tables.
- ❑ Run the `/home/user/ibi/WebFOCUS82/utilities/dbupdate/db_check_version.sh` utility to verify if the database was updated.

- ❑ In case the application server cannot load the WebFOCUS web application, review the application server logs and WebFOCUS logs, such as the event.log for errors.
- ❑ WebFOCUS system event logs are created in the /home/user/ibi/WebFOCUS82/logs folder.
- ❑ Log names for the dbupdate and dbcheck utilities are named db_inplace_update_<timestamp>.log and db_check_version__<timestamp>.log and are created in the /home/user/ibi/WebFOCUS82/application_logs folder.
- ❑ If the database update was successful, and the application server fails to start and db_check_version indicates that the database is not up to date, ensure that the application server cache is cleared and attempt to restart the application server and connect to WebFOCUS.

Note:

- ❑ Upgrades backup the entire existing installation in the following folder:
/home/user/ibi/WebFOCUS82/backup_files/

If multiple upgrades are performed, the latest existing backup is renamed, with the current date/time stamp appended to the folder name, for example:
/home/user/ibi/WebFOCUS82/backup_files_02.22.2020.13.46/
- ❑ During the upgrade installation, configuration changes are applied to the new installation while restoring files from the backup location or by merging configuration changes from the backup files to the files created by the new installation.
- ❑ If you made custom changes to files that are not restored during upgrades, restore the required files manually.

Migrating Configuration Files from Release 8.1 Version 05M to Release 8206

Due to architecture changes in WebFOCUS, the configuration of WebFOCUS has changed between Release 8.1.x and Release 8.2.x. If you are upgrading content from Release 8.1 Version 05M to Release 8206, use the configuration file migration utility to ensure that the configuration applied in the earlier release is properly migrated to the new installation.

Note: Run the configuration file migration utility before updating the WebFOCUS database repository.

Configuration File Migration Utility Implementation

The configuration file migration utility is implemented using Java. A supported version of Java is required to run the configuration file migration utility. You can perform the migration by running Java commands from the UNIX shell.

The following configuration files will be migrated:

- ❑ webconfig.xml and install.cfg

The install.cfg file in Release 8206 will be updated and the following settings will be added while moving entries from the install.cfg and webconfig.xml files from the earlier Release 8.1 Version 05M installation:

```
IBI_APPROOT_DIRECTORY
IBI_WEBAPP_CONTEXT_DEFAULT
IBI_WEBFOCUS_CONTEXT
IBI_STATIC_CONTENT_CONTEXT
IBI_HELP_CONTEXT
IBI_REPORTCASTER_CONTEXT
IBI_REPOS_DB_USER
IBI_REPOS_DB_PASSWORD
IBI_REPOS_DB_DRIVER
IBI_REPOS_DB_URL
```

After running the migration utility, check the updated install.cfg file to ensure it has the correct entries in the following settings related to database name and user:

```
IBI_REPOS_DB_USER
IBI_REPOS_DB_PASSWORD
IBI_REPOS_DB_DRIVER
IBI_REPOS_DB_URL
```

Note: Any additional updated settings found in the webconfig.xml file will be moved to the webfocus.cfg file.

The configuration file migration utility will not move the following settings. The Release 8206 defaults will be used for the following:

```
IBI_CSRF_ENFORCE
IBI_CM_RETAIN_HANDLES
IBI_CUSTOM_SECURITY_PARAMETER
IBI_CUSTOM_SECURITY_DRIVER
IBI_ENCRYPTION_PROVIDER
IBI_MOVE_CONFIRMATION_MESSAGE
IBI_REPOSITORY_SYNC_INTERVAL
IBI_REST_METHOD_ENFORCE
```

- ❑ languages.xml. Configuration entries in this file for Release 8.1 Version 05M will be combined with the entries in the Release 8206 version of the file.

- mime.wfs. Configuration entries in this file for Release 8.1 Version 05M will be combined with the entries in the Release 8206 version of the file.
- Security files:
 - securitysettings.xml
 - securitysettings-mobile.xml
 - securitysettings-portlet.xml
 - securitysettings-zone.xml

These security files will get copied from Release 8.1 Version 05M to Release 8206.

If you use SAML authentication, update the migrated securitysettings.xml file and ensure the path to the location of the SAML certificate is correct.

The default path for Release 8.1.05 is:

```
{IBI_CONFIGURATION_DIRECTORY}/was/saml/samlKeystore.jks
```

The default location for Release 8206 is:

```
{IBI_CONFIGURATION_DIRECTORY}/was/wfKeystore.jks
```

Note:

- The original files modified through the configuration file migration utility will be backed up in the following directory:

```
../ibi/WebFOCUS82/merge_files/
```

- The log file name and location is:

```
../ibi/WebFOCUS82/application_logs/configMigration.log
```

- To preserve additional customizations done in Release 8.1 Version 05M, it is recommended that you copy the following configuration files from your Release 8.1 Version 05M installation to the corresponding folder of your Release 8206 installation.

Prior to proceeding with the copy, ensure you have backed up the original files from Release 8206.

- ../ibi/WebFOCUS81/client/wfc/etc/odin.cfg

Reporting Servers specified in the odin.cfg file must meet requirements of WebFOCUS Release 8.2.x.

`../ibi/WebFOCUS81/client/wfc/etc/site.wfs`

Restore this file if it has been customized.

`../ibi/WebFOCUS81/config/license.cfg`

`../ibi/WebFOCUS81/config/wflicense.key`

`../ibi/WebFOCUS81/ibi_html/javaassist/ibi/html/olap/olapdefaults.js`

`../ibi/WebFOCUS81/config/caster/ApplicationPreferences.xml`

`../ibi/WebFOCUS81/ibi_html/javaassist/nls.txt`

`../ibi/WebFOCUS81/config/security_metadatasource.xml`

`../ibi/WebFOCUS81/ibi_html/javaassist/ibi/html/js/multidrill.css`

Restore this file if it has been customized.

`../ibi/WebFOCUS81/config/was/`

`../ibi/WebFOCUS81/config/web_resource/map/`

Ensure the JDBC driver configuration in the Release 8206 installation is correct and supports the database repository that is configured in the `install.cfg` file.

`../ibi/WebFOCUS82/utilities/setenv/utilusersvars.sh`

- The migration of other customized files needs to be manually applied to the new installation.

Procedure: How to Run the Configuration File Migration Utility

1. From the UNIX shell, navigate to the following directory:

```
../ibi/WebFOCUS82/utilities/lib/
```

2. Run the following command:

```
java -classpath IBFSCommands.jar
com.ibi.applications.config.WFMigrateConfig
oldDocumentRoot newDocumentRoot
```

where:

```
oldDocumentRoot
```

Is the root location of the Release 8.1 Version 05M installation.

newDocumentRoot

Is the location of the new installation directory.

For example:

```
java -classpath IBFSCommands.jar
com.ibi.applications.config.WFMigrateConfig
/home/ibi/WebFOCUS81 /home/ibi/WebFOCUS82
```

Note:

- ❑ A supported version of Java is required to run the configuration file migration utility.
- ❑ When running the Java command to migrate the configuration files, you can also specify the location of Java to be used.

For example:

```
/usr/java/jre1.8.0_242/bin/java -classpath IBFSCommands.jar
com.ibi.applications.config.WFMigrateConfig
/home/ibi/WebFOCUS81 /home/ibi/WebFOCUS82
```

Upgrading Content From Release 8.1.x or 8.0.x to Release 8206

The following procedure describes how to upgrade content and applications from WebFOCUS Release 8.1.x or 8.0.x to Release 8206.

Procedure: How to Upgrade Content From Release 8.1.x or 8.0.x to Release 8206

1. **Important:** Make a backup of your database repository, following your corporate best practices.
2. Ensure the collation of the database, including all tables and columns, is case sensitive.
3. Ensure the database is running.
4. Perform a new full installation of Release 8206.

Note: During the installation, you will point to the existing 8.1.x or 8.0.x database repository that you plan to use with Release 8206.

5. During the installation of Release 8206, specify the type of database repository, as well as the database repository information for the earlier database repository that you are using. Specifically, in the Select Components to install dialog box, under Configure pre-existing Database, select the type of database repository that you are using, such as Microsoft SQL Server or Oracle. In addition, ensure the *Create WebFOCUS Repository* option is not selected.
6. Next, type the database repository name, connection, and configuration information.

Note: The credentials you provide need privileges to create and edit database tables.

Once completed, the new installation of Release 8206 is available in the /home/user/ibi/WebFOCUS82 directory.

7. Stop your application server, for example, Apache Tomcat.
8. Ensure that your database repository, for example Microsoft SQL Server, where your WebFOCUS 8.0.x or 8.1.x database repository is stored, is running.
9. **Important:** Rename the /home/user/ibi/WebFOCUS82/utilities/lib/versions/8200/IBFSCommands.jar file.
10. Run the configuration file migration utility, as described in [Migrating Configuration Files from Release 8.1 Version 05M to Release 8206](#) on page 62.
11. Run the /home/user/ibi/WebFOCUS82/utilities/dbupdate/db_inplace_update utility.

Note:

- You will be prompted for database credentials. Ensure the user name provided is allowed to create and edit database tables.
- Important:** You will be prompted for the location of the IBFSCommands.jar file. Point to the IBFSCommands.jar file used in the release in which the WebFOCUS repository was created. For example, if you are using 8.1.x, point to the /home/user/ibi/WebFOCUS82/utilities/lib/ folder.

Note: If you install Release 8206 on a different machine, that does not have access to the earlier version of WebFOCUS, you must copy the IBFSCommands.jar file from the earlier version of WebFOCUS to the machine with Release 8206 in location /home/user/ibi/WebFOCUS82/utilities/lib/versions/8200/.

- After the script completes, you should receive an Update process SUCCEEDED message.
12. If you are updating an 8.0.x database for use with Release 8206, you need to run the following utilities after db_inplace_update:

```
/home/user/ibi/WebFOCUS82/utilities/bip/portalconversion.sh
```

```
/home/user/ibi/WebFOCUS82/utilities/bip/favoritesmigration.sh
```

Logs are created in the /home/user/ibi/WebFOCUS82/application_logs folder.

13. After a successful database update, clear the application server cache and then start the application server.
14. Confirm that the connection to WebFOCUS is functional and that the content is correct.
15. Run the following utility to load new roles and BI Portal page templates into the WebFOCUS repository:

```
/home/user/ibi/WebFOCUS82/utilities/WFReposUtil/update_repos.sh
```

You will be prompted to provide WebFOCUS administrator credentials.

This utility imports the following Change Management packages:

- ❑ /home/user/ibi/WebFOCUS82/features/bip/managers_group_and_rules.zip
- ❑ /home/user/ibi/WebFOCUS82/features/bip/bip_page_templates_Vnn.zip, where *nn* is the version of the package.
- ❑ /home/user/ibi/WebFOCUS82/features/bip/pgx_page_templates_Vnn.zip, where *nn* is the version of the package.
- ❑ /home/user/ibi/WebFOCUS82/features/bip/themes_Vnn.zip, where *nn* is the version of the package.
- ❑ /home/user/ibi/WebFOCUS82/features/roles/roles.zip.

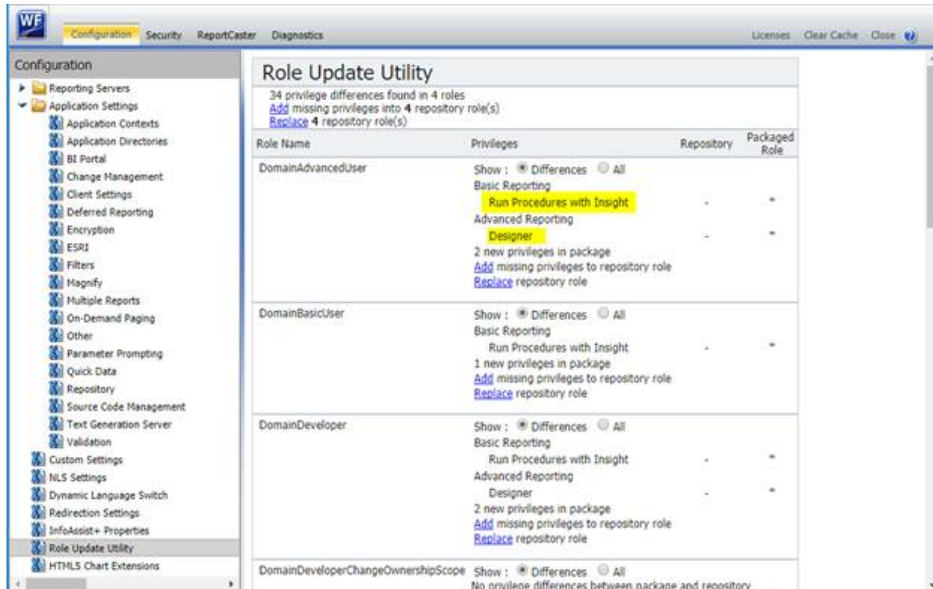
Logs are created in the /home/user/ibi/WebFOCUS82/application_logs folder under the following names:

- ❑ cm_import_bip_page_templates_<date_time>.log
- ❑ cm_import_managers_group_and_rules_<date_time>.log
- ❑ cm_import_themes_Vnn<date_time>.log
- ❑ cm_import_pgx_page_templates_Vnn<date_time>.log
- ❑ cm_import_roles_<date_time>.log
- ❑ cm_import_managers_group_and_rules_<date_time>.log

16. Use the Role Update Utility available in the WebFOCUS Administration Console to update repository roles and privileges. The utility enables you to identify differences between roles and privileges available in your existing repository and the new roles and privileges provided with the new installation.

It is recommended that you replace your repository with new roles and privileges to use new functionality and features.

The following is an example using a WebFOCUS Release 8.2 Version 01M repository and upgrading to Release 8206. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access WebFOCUS Designer.



- Sign in to WebFOCUS as an administrator.
- Click the User menu, point to *Administration*, and then click *Administration Console*.
- In the Configuration panel, click *Role Update Utility*.

At the top of the table, you will see a message that identifies new roles and high-level differences between your existing roles.

- Examine the differences between the Repository and Packaged roles and privileges and apply the new roles and privileges to enable new functionality and features.

17. Clear the application server cache.

18. Restart the application server.

19. Connect to WebFOCUS and ensure the database is working properly.

Note: If you did not specify the configuration information for your existing database repository during the installation, you must edit the `install.cfg` file. The `install.cfg` file is located in the `WebFOCUS82\config\` directory. Open the file and provide the necessary path information, host name, port, and database name for the JDBC driver connection string and the credentials for the database repository. The database user password is encrypted once the application server is restarted. Database credentials must allow database table creation and table edits.

Proceed with steps 7 through 18.

Troubleshooting

Review the following section if you encounter issues while performing your upgrade.

Issue 1: The database repository update fails immediately.

Solution: If the database repository update fails, ensure that the database repository is running, and the database owner is allowed to update the database repository. Meaning, the database owner can create and edit tables.

Note: The user ID must have db_owner rights to the repository database.

Issue 2: The application server fails to start.

Solution: Run the db_check_version.sh utility, which is available in the WebFOCUS82\utilities\dbupdate folder, to verify whether the database repository was updated, or needs to be updated.

Issue 3: The application server fails to start or the database repository update fails.

Solution: Use the WebFOCUS web application to review the application server logs and WebFOCUS logs, such as event.log, for errors. These logs are located in the following folders:

- WebFOCUS system event logs are created in the /home/user/ibi/WebFOCUS82/logs folder.
- Log names for the dbupdate and dbcheck utilities are named db_inplace_update_<timestamp>.log and db_check_version__<timestamp>.log and are created in the /home/user/ibi/WebFOCUS82/application_logs folder.

Upgrading In Place from Release 8.1 Version 05M to Release 8206

The following topic describes how to perform an upgrade in place of content from Release 8.1 Version 05M to Release 8206, while using the existing WebFOCUS 8.1 installation directory.

Note: The upgrade in place feature only applies to Release 8.1 Version 05M Gen 172 and higher. If you are using Release 8.1 Version 05M Gen 14, contact Customer Support Services.

Prerequisites for Upgrading In Place

The following are prerequisites for upgrading in place from Release 8.1 Version 05M to Release 8206:

- Ensure the database used for the WebFOCUS repository is backed up prior to proceeding with the upgrade installation.

This is required as the installation program performs database changes and a restore may be required in case of failures.

- For the installation that will be upgraded, it is recommended to back up the existing installation folder and files on disk.

The installation program backs up the entire directory prior to upgrading and will restore all files in case there are failures that do not allow the installation to proceed. This is a safety measure in case there are installation failures.

- Ensure the application server used by the Release 8.1 Version 05M installation meets the WebFOCUS Release 8206 requirements:
 - WebFOCUS is configured for a supported version of Java.
 - Application server supports the servlet API 3.0 specifications.
 - If using Tomcat, it is recommended that you use the latest 8.5.x version. Tomcat 8 or higher is supported.
 - You are using a supported database.
- Prior to running the upgrade installation, ensure the application server used by the existing WebFOCUS installation is stopped to ensure files are not locked and there is no product usage.

If Tomcat is used, the installation program attempts to stop the Apache Tomcat service.

- Ensure the ReportCaster service for the existing installation is stopped.

The installation program attempts to stop the ReportCaster service.

- To avoid files being locked, ensure files from the existing installation are not opened by UNIX Shell, or another application, such as an editor or browser.

- Ensure the connection to the database hosting the WebFOCUS repository is running.

The following are tasks performed by the installation after selecting to upgrade an existing Release 8.1 Version 05M to Release 8206 on Windows:

1. Check for existence of a supported version of Java.
2. Check for Tomcat and stop service.
3. Check for ReportCaster service and attempt to stop it.
4. Check database connection to run required database scripts.

This is done based on connection information available in the install.cfg file.

5. Upon successful connection, you are prompted to provide WebFOCUS administrator credentials to be used when the installation runs the `update_repos` script.
6. User authentication and authorization is performed to ensure the provided WebFOCUS account is valid and has privileges to perform import of Change Management packages.
7. Backup all files to the following folder:

`/install_directory/ibi/WebFOCUS81/backup_files/`

If the backup fails, for example, due to locked files, a message displays. The installation restores all backed up files and exits.

8. The new Release 8206 installation is performed in the same WebFOCUS Release 8.1.x folder and the installation properly applies required edits to configuration files, in addition to restoring files, as specified in step 9.
9. Files updated by the installation get backed up in the following folder:

`/install_directory/ibi/WebFOCUS81/update_files/`

The following files are restored and updated during installation:

- web.xml.** Updated during installation, using default values.
- odin.cfg.** Restored from backup.
- site.wfs.** Restored from backup.
- license.cfg.** Restored from backup.
- wflicense.key.** Restored from backup.
- olapdefaults.js.** Restored from backup.
- nls.txt.** Restored from backup.
- security_metadatasource.xml.** Restored from backup.
- multidrill.css.** Restored from backup.
- config/caster/ApplicationPreferences.xml.** Restored from backup.
- /config/was/.** Restored from backup.
- /config/web_resource/map/.** Restored from backup.
- nlscfg.err.** Language and code page will be updated, based on configuration of existing installation. If the WebFOCUS Client code page in the Release 8.1 Version 05M installation was configured as 137 or 437, the code page gets changed to 1252, which is the new replacement value for Release 8.2.x.

10. Migration of configuration files is performed.

Files updated by the migration utility are backed up in the following folder:

```
/install_directory/ibi/WebFOCUS81/merge_files/
```

❑ **webconfig.xml and install.cfg**

The install.cfg file in Release 8206 will be updated. The following settings will be added while moving entries from the install.cfg and webconfig.xml files from the earlier Release 8.1.x installation:

```
IBI_APPROOT_DIRECTORY IBI_WEBAPP_CONTEXT_DEFAULT
IBI_WEBFOCUS_CONTEXT IBI_STATIC_CONTENT_CONTEXT
IBI_HELP_CONTEXT IBI_REPORTCASTER_CONTEXT
IBI_REPOS_DB_USER IBI_REPOS_DB_PASSWORD
IBI_REPOS_DB_DRIVER IBI_REPOS_DB_URL
```

Note:

- ❑ Any additional updated settings found in the webconfig.xml file will be moved to the webfocus.cfg file.
- ❑ File types specified in the WebFOCUS Administration Console for inclusion in the Change Management export packages are preserved during upgrades and an entry with these values is added to the webfocus.cfg file. By default, 8.2.x releases support the following file types for exports created by the change management feature: acx, bmp, css, fex, gif, htm, html, ico, jpe, jpeg, jpg, js, mas, mnt, png, sty, and svg. The file type list can be adjusted from the WebFOCUS Administration Console.

The configuration file migration utility will not move the following settings. The Release 8206 defaults will be used for the following:

```
IBI_CSRF_ENFORCE IBI_CM_RETAIN_HANDLES
IBI_CUSTOM_SECURITY_PARAMETER IBI_CUSTOM_SECURITY_DRIVER
IBI_ENCRYPTION_PROVIDER IBI_MOVE_CONFIRMATION_MESSAGE
IBI_REPOSITORY_SYNC_INTERVAL IBI_REST_METHOD_ENFORCE
```

The IBI_WEBAPP_DEFAULT_URL setting is created in install.cfg and is used by the InfoSearch Dimension Index Loader. The default value is:

```
http://<hostname>:80
```

This can be configured through the WebFOCUS Administration Console to provide the proper WebFOCUS protocol, host name, and port.

- ❑ **mime.wfs.** Entries in this file for Release 8.1.x will be combined with the entries in the Release 8206 version of the file.

Security files:

- securitysettings.xml
- securitysettings-mobile.xml
- securitysettings-portlet.xml
- securitysettings-zone.xml

These security files will get copied from Release 8.1.x to Release 8206.

- languages.xml.** Entries in this file for Release 8.1.x will be combined with the entries in the Release 8206 version of the file.

- cgivars.wfs.** Settings stored in /client/wfc/etc/cgivars.wfs, such as Default Server Node, OLAP, and Parameter Prompting settings are not maintained during the migration process. These settings should be reapplied through the Administration Console. Changes to settings applied through the Administration Console are written to the /config/webfocus.cfg file, starting with Release 8.2.

11. Check database collation.

12. If the database is MS SQL Server or MySQL and collation is CI, the installation program changes the database collation to the best matched CS collation.

13. Run the database update.

14. Run the update_repos utility.

15. Tomcat cache is cleared.

16. Tomcat is restarted.

17. Installation completes by running the verification page.

Note: If you are using another application server, redeploy the WebFOCUS web application WAR or EAR file, clear cache manually, and restart the application server.

Note: If any of the database update tasks fail, for example due to connectivity issues or not having database or WebFOCUS account credentials, the database update tasks can be performed post installation.

Post-Installation Review for Upgrading In Place

1. Ensure all required services are running (application server, ReportCaster service).
2. Ensure the connection to the database is working.
3. Connect to WebFOCUS to ensure the product is working and content is accessible.

WebFOCUS uses the web application context that was configured in the earlier Release 8.1.x version.

4. If the web application fails to load:
 - a. Check the application logs and WebFOCUS event.log.
 - b. Ensure the product uses a valid license supported by Release 8206.
5. Ensure configuration file migration was successful by checking the existence of the following folder:

```
/install_directory/ibi/WebFOCUS81/merge_files/
```

6. Verify the contents of the install.cfg and webfocus.cfg files in the following folder:

```
/install_directory/ibi/WebFOCUS81/config/
```

7. Ensure the jdbc driver set in the following folder is correct, based on the database used as the WebFOCUS repository.

```
/install_directory/ibi/WebFOCUS81/utilities/setenv/utiluservars.sh
```

8. If collation check or change failed during the installation, the following needs to be performed post installation:

- a. Stop the application server.
- b. Ensure connection to the database is accessible and you have credentials that allow database changes (create/edit tables).
- c. Change database collation manually or using the tools available with the updated installation in the following folder:

```
/install_directory/ibi/WebFOCUS81/utilities/dbupdate/collation/
```

- d. Run the database update by opening a Command Window (or a UNIX shell) and navigating to the following folder:

```
/install_directory/ibi/WebFOCUS81/utilities/dbupdate/
```

- e. From this location, run:

```
db_inplace_update.sh USERNAME= PASSWORD=password  
SOURCE_CLASS_PATH=source_class_path
```

where:

```
username
```

Is a database user account with db_owner rights to the repository database.

```
password
```

Is the password of the database user account.

`source_class_path`

Points to the location of the IBFSCommands.jar file from the original installation that was upgraded. Do not include the file name.

This file is backed up in the following folder:

`/install_directory/ibi/WebFOCUS81/backup_files/utilities/lib/`

For example:

```
/install_directory/ibi/WebFOCUS81/utilities/dbupdate/  
db_inplace_update.sh USERNAME=sa PASSWORD=pswd  
SOURCE_CLASS_PATH=/install_directory/ibi/WebFOCUS81/backup_files/  
utilities/lib/
```

- f. Run the following to import the required Change Management packages.

```
/install_directory/ibi/WebFOCUS81/utilities/WFReposUtil/  
update_repos.sh
```

- g. Clear the application server cache.
- h. Restart the application server.

Performing a New Release 8206 Installation Using an Existing 8.2.x WebFOCUS Repository

The following procedure describes how to perform a new Release 8206 installation while using a WebFOCUS repository from an earlier 8.2.x installation.

Procedure: How to Perform a New Release 8206 Installation Using an Existing 8.2.x WebFOCUS Repository

1. Make a copy of your 8.2.x database to be used by the new Release 8206 installation.
2. Ensure the collation of the database, including all tables and columns, is case sensitive.
3. Ensure the database is running.
4. Perform a new full installation of Release 8206.

Note: During the installation, you will point to the copy of the 8.2.x database that you made in Step 1.

5. During the installation of Release 8206, specify the type of database repository, as well as the database repository information for the earlier database repository that you are using. Specifically, in the Select Components to install dialog box, under Configure pre-existing Database, select the type of database repository that you are using, such as Microsoft SQL Server or Oracle. In addition, ensure the *Create WebFOCUS Repository* option is not selected.

6. Next, type the database repository name, connection, and configuration information.

Note: The credentials you provide need privileges to create and edit database tables.

Once completed, the new installation of Release 8206 is available in the `/install_directory/ibi/WebFOCUS82` directory.

7. Stop your application server, for example, Apache Tomcat.
8. Ensure that your database repository, for example Microsoft SQL Server, where your WebFOCUS 8.2.x database repository is stored, is running.
9. Run the `/install_directory/ibi/WebFOCUS82/utilities/dbupdate/db_inplace_update` utility.

Note:

- You will be prompted for database credentials. Ensure the user name provided is allowed to create and edit database tables.
 - After the script completes, you should receive an Update process SUCCEEDED message.
10. After a successful database update, clear the application server cache and then start the application server.
 11. Confirm that the connection to WebFOCUS is functional and that the content is correct.
 12. Run the following utility to load new roles and BI Portal page templates into the WebFOCUS repository:

```
/install_directory/ibi/WebFOCUS82/utilities/WFReposUtil/update_repos.sh
```

You will be prompted to provide WebFOCUS administrator credentials.

This utility imports the following Change Management packages:

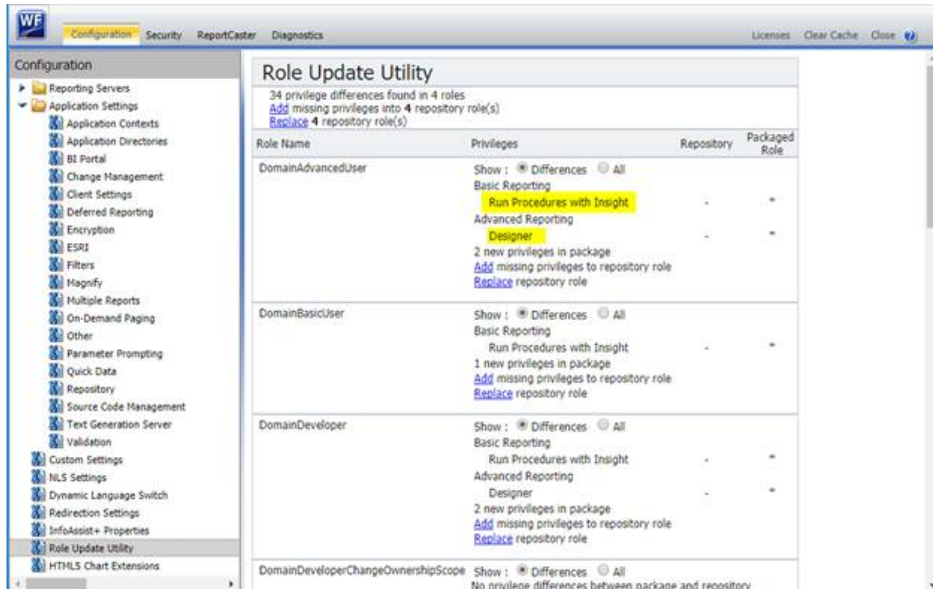
- `/install_directory/ibi/WebFOCUS82/features/bip/managers_group_and_rules.zip`
- `/install_directory/ibi/WebFOCUS82/features/bip/bip_page_templates_Vnn.zip`, where `nn` is the version of the package.
- `/install_directory/ibi/WebFOCUS82/features/bip/pgx_page_templates_Vnn.zip`, where `nn` is the version of the package.
- `/install_directory/ibi/WebFOCUS82/features/bip/themes_Vnn.zip`, where `nn` is the version of the package.
- `/install_directory/ibi/WebFOCUS82/features/roles/roles.zip`.

Logs are created in the *install_directory/ibi/WebFOCUS82/application_logs* folder under the following names:

- ❑ `cm_import_bip_page_templates_<date_time>.log`
 - ❑ `cm_import_managers_group_and_rules_<date_time>.log`
 - ❑ `cm_import_themes_Vnn<date_time>.log`
 - ❑ `cm_import_pgx_page_templates_Vnn<date_time>.log`
 - ❑ `cm_import_roles_<date_time>.log`
 - ❑ `cm_import_managers_group_and_rules_<date_time>.log`
13. Use the Role Update Utility available in the WebFOCUS Administration Console to update repository roles and privileges. The utility enables you to identify differences between roles and privileges available in your existing repository and the new roles and privileges provided with the new installation.

It is recommended that you replace your repository with new roles and privileges to use new functionality and features.

The following is an example using a WebFOCUS Release 8.2 Version 01M repository and upgrading to Release 8206. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access WebFOCUS Designer.



- Sign in to WebFOCUS as an administrator.
- Click the User menu, point to *Administration*, and then click *Administration Console*.
- In the Configuration panel, click *Role Update Utility*.

At the top of the table, you will see a message that identifies new roles and high-level differences between your existing roles.

- Examine the differences between the Repository and Packaged roles and privileges and apply the new roles and privileges to enable new functionality and features.

Creating the WebFOCUS UOA Repository

WebFOCUS 8.2 has a new architecture whereby all WebFOCUS web-tier content is stored in an RDBMS database. This database is referred to as the WebFOCUS UOA repository.

Procedure: How to Create the WebFOCUS UOA Repository

Note: To override the default tablespace when creating the Oracle UOA repository, follow these steps after the WebFOCUS Client and ReportCaster installations are complete.

1. Generate the Oracle DDL file as follows:
 - a. Run `install_directory/utilities/WFReposUtil/WFReposUtilCreateDDL.sh`.
This will create a file called `ddl-generation.sql` in the `install_directory/utilities/WFReposUtil` directory.
2. Update the `ddl-generation.sql` file:
 - a. For appropriate SQL statements, specify the Oracle tablespace in which the UOA repository tables are to be created and loaded.
3. Using an external tool, load the UOA repository tables to input SQL statements from the updated `ddl-generation.sql` file.
4. Run `install_directory/utilities/WFReposUtil/WFReposUtilLoad.sh` to load the required WebFOCUS UOA information into the UOA repository.
5. Verify that the UOA repository tables were created and loaded in the Oracle tablespace specified in the `ddl-generation.sql` file.

Configuring Web and Application Servers

The WebFOCUS environment will comprise a WebSphere Network Deployment that has a WebSphere cluster with two members. This means that when the WebFOCUS web applications are installed, they must be installed to the WebSphere cluster, not to the individual WebSphere application server instances.

Procedure: How to Configure Web and Application Servers

To configure web and application servers:

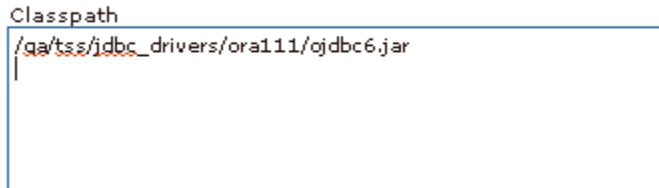
1. Verify that the WebSphere JPA 2.0 Feature Pack is installed from the WebSphere Admin Console for each of the two WebSphere application servers in the WebSphere cluster.

In the list of application servers, the version for each of the WebSphere application servers to be used for WebFOCUS should reflect that JPA 2.0 is installed, as shown in the following image.

Select	Name	Node	Host Name	Version	Cluster Name	Status
You can administer the following resources:						
<input type="checkbox"/>	vashti	hppa31Node01	hppa31.ibi.com	ND 7.0.0.17 JPA 2.0 Feature 1.0.0.0		?

2. From the WebSphere Admin Console, add the Oracle JDBC driver to the Java Setting of the WebSphere Application Server instance.
 - a. Navigate to *Application Servers, {Server Instance}, Server Infrastructure, Java and Process Management, Process Definition*, and then *Java Virtual Machine*.
 - b. Under *General Properties*, add the fully qualified path to the Oracle JDBC driver to Classpath, as shown in the following image.

General Properties



3. Install the WebFOCUS web applications packaged with WebFOCUS 8.2 to the WebSphere Network Deployment Cluster Node:


```
install_directory/webapps/webfocus.war (context root /ibi_apps)
install_directory/webapps/ibi_help.war (context root /ibi_help)
```
4. Generate and propagate the web server plug-in.
5. Start the WebFOCUS web applications and application server.

WebFOCUS Client and ReportCaster Directory Structures

After installation, the WebFOCUS Client and ReportCaster directory structures are created. The default location for WebFOCUS products is \$HOME/ibi.

WebFOCUS Client Directories

The following directory is installed in the ibi directory by default:

`apps`

Contains applications and data files. By default, this is the APPROOT directory where WebFOCUS looks for application files.

The default location for other directories is in the WebFOCUS82 directory. For example:

`install_directory/ibi/WebFOCUS82`

The WebFOCUS82 directory contains the following subdirectories:

`application_logs`

Contains log files generated from application utilities, such as change management imports or database updates.

`backup_files`

Upgrades backup the entire existing installation in the following folder:

`/WebFOCUS82/backup_files/`

If multiple upgrades are performed, the latest existing backup is renamed, with the current date/time stamp appended to the folder name, for example:

The restore of configuration files and changes to configuration files are performed at the end of the installation upgrade process and information is written to the following log file:

`WebFOCUS82_<date_time>.log`

`client`

Contains configuration files.

`cm`

Default location for Change Management import and export packages.

`config`

Contains additional configuration files and files for optional security configurations.

`features`

Contains templates for new portals and resources related to security configuration.

`ibi_html`

Contains Java tools, templates, and other files used by WebFOCUS.

`licenses`

Contains licenses for WebFOCUS and third-party software components.

`logs`

Contains space for log files of system events.

`magnify`

Contains Magnify product files.

`maptiles`

Legacy folder that contains local map tiles, which were used when rendering maps using OpenStreetMap® data.

`migration_import`

Location for migration packages created from an earlier release.

`ReportCaster`

Contains the ReportCaster Distribution Server directories and files.

`samples`

Contains sample WebFOCUS API applications and demos.

`temp`

Contains space used during internal processing.

`Uninstall_WebFOCUS82`

Contains files used by the uninstall program.

`utilities`

Contains tools for configuration, migration, and other tasks.

`webapps`

Contains the WebFOCUS and ReportCaster web applications.

ReportCaster Distribution Server Directories

The default directory for the Distribution Server is:

`install_directory/ibi/WebFOCUS82/ReportCaster`

The directory contains the following subdirectories:

`bin`

Contains application and other executable files.

`cfg`

Contains configuration and NLS resource files.

`lib`

Contains ReportCaster libraries.

`log`

Contains configuration and error messages.

`resources`

Contains resources.

`samples`

Contains sample API files.

`temp`

Contains space for internal processing.

`trc`

Contains the trace files.

Note: ReportCaster web components are installed with WebFOCUS Client.

File Permissions for WebFOCUS Client Directories

WebFOCUS sometimes runs as part of your web server and application server. Therefore, the web and application servers require full access to WebFOCUS directories.

Procedure: How to Configure File Permissions for WebFOCUS Client Directories

1. Determine which user IDs run web server and application server processes.
 - ❑ If you installed using the same ID that runs the web and application server processes, then file permissions should default correctly.
 - ❑ If web and application servers run as different user IDs, determine which user IDs run your web and application server processes.
2. Grant those IDs full access to WebFOCUS Client directories and their subdirectories:
 - `/install_directory/ibi/apps`
 - `/install_directory/ibi/WebFOCUS82`
 - ❑ If WebFOCUS Client directories are owned by a group whose only member is the owner of the files, then add the other IDs to this group and change permissions to 775.
 - ❑ If WebFOCUS Client directories are owned by a general group that has many members, change group ownership to a group containing only the necessary IDs and change permissions to 775.

Permissions can be further restricted to 770 for sensitive directories, like config.

Note: Communication between WebFOCUS Client and the WebFOCUS Reporting Server is through TCP/IP, not the file system. However, if WebFOCUS Client and the WebFOCUS Reporting Server are installed on the same machine as the same user, they may share the same approot directory, `/install_directory/ibi/apps` by default. If this is the case, both WebFOCUS Client and Reporting Server processes require access to this directory.

Uninstalling the WebFOCUS Client

Prior to uninstalling the WebFOCUS Client software, ensure that all related servers are stopped (for example, application server, HTTP server, and ReportCaster). You can use the following options to uninstall the WebFOCUS Client:

- ❑ Delete the `WebFOCUSnn` folder from the disk. This is the preferred method for uninstalling the software.
- ❑ The uninstall script, `Uninstall_WebFOCUS82`, located in the `usr/ibi/WebFOCUS82/Uninstall_WebFOCUS82/` directory. Note that this process is slower.
- ❑ A silent uninstall, using the command line, by adding the option `-i silent` after the uninstall executable file. For example:

```
usr/ibi/WebFOCUS82/Uninstall_WebFOCUS82/Uninstall_WebFOCUS82.sh -i silent
```




Chapter 4

Configuring Web and Application Servers

This chapter explains how to configure your web and/or application server for WebFOCUS.

The following abbreviation is used for the path to the ibi directory where you install WebFOCUS components on your system:

/install_directory/

Substitute the actual directory on your system when reviewing procedures and examples in this document.

The configuration is not difficult, but there are many options, so be sure to read this chapter carefully. Only subsections will apply to your environment, so you should be careful to determine which sections apply.

Note: The terms web server and HTTP server are used somewhat interchangeably in this section because Apache HTTP Server and IBM HTTP Server are web servers.

In this chapter:

- [Configuration Overview](#)
 - [Configuring IBM WebSphere](#)
 - [Configuring Oracle WebLogic](#)
 - [Manually Configuring Apache Tomcat With or Without Apache HTTP Server](#)
 - [Installing and Configuring JBoss EAP 6.0.x or 6.2.x](#)
-

Configuration Overview

You have several configuration options for WebFOCUS. This section addresses web server and application server deployment. When using file and folder names that use NLS characters, the application server and the operating system must be configured with the same language encoding.

Important: For a split-tier environment, see [Configuring WebFOCUS in a Split Web-Tier and Application Server-Only Environment](#) on page 117.

❑ **Web Server and Application Server.** (Aliases and web applications). In a standard configuration, you create aliases to traditional static web content in the WebFOCUS ibi/apps directory and deploy a web application on your application server (webfocus.war). This is supported when both a web (HTTP) server and an application server are used for WebFOCUS processing. It is also supported when using an application server like Apache Tomcat that can behave like a web server and serve content outside of web applications.

If your web server and application server are located on different machines, see [Configuring WebFOCUS in a Split Web-Tier and Application Server-Only Environment](#) on page 117.

❑ **Application Server Only.** (All web applications). In an application server only configuration, you deploy all WebFOCUS content through web applications (WAR files). In this configuration, you deploy approot.war in addition to webfocus.war and you do not create web server aliases.

For important information on configuring approot.war, see [Configuring WebFOCUS in a Split Web-Tier and Application Server-Only Environment](#) on page 117.

Procedure: How to Configure a Web Server and an Application Server for WebFOCUS

The following is an overview of the steps needed to configure the web or application server for WebFOCUS.

1. Ensure application server and web server components are installed and properly functioning. Refer to third-party documentation, if necessary.

If you do not have an application server, the WebFOCUS Client installation can install and configure Apache Tomcat for you.

2. Configure the application server to support WebFOCUS graphics. To do this, you must either set the DISPLAY variable to an X Windows Server or set the Java VM headless option (-Djava.awt.headless=true).

3. Add the WebFOCUS repository JDBC driver to your application server CLASSPATH.
4. Deploy the WebFOCUS web application on the application server.

WebFOCUS components are packaged as a J2EE web application. The web application is provided as the following WAR file:

`install_directory/ibi/WebFOCUS82/webapps/webfocus.war`

It is also provided as the following expanded directory:

`install_directory/ibi/WebFOCUS82/webapps/webfocus`

You can deploy either the WAR files or expanded directories, depending on your preference and the capabilities of your application server. Be aware that when applying a service pack, any changes made to the web applications must be in the expanded directories to be maintained.

The default deployment parameters for WebFOCUS are:

Context Root/ Path	Doc base or location
<code>/ibi_apps</code>	<code>install_directory/ibi/WebFOCUS82/webapps/webfocus.war</code>
<code>/ibi_help</code>	<code>install_directory/ibi/WebFOCUS82/webapps/ibi_help.war</code>
<code>/aproot</code>	<code>install_directory/ibi/WebFOCUS82/webapps/aproot.war</code>

5. Ensure your web server routes requests for the `/ibi_apps`, `/ibi_help`, and `/aproot` web application context roots to the application server.
6. Verify the configuration using the tools in the WebFOCUS Administration Console, as explained in *WebFOCUS Post-Installation Tasks* on page 117.

Note: If you are installing multiple instances, completely install and configure a single instance, and then refer to *Additional WebFOCUS Repository Topics and Tasks* on page 173 for instructions on configuring the second instance.

Documented Configurations

The following configurations are explained in this chapter:

- ❑ **IBM WebSphere** Application Server with or without IBM HTTP Server, see *Configuring IBM WebSphere* on page 90.

- ❑ **Oracle WebLogic 12c** with or without Apache HTTP Server, see [Configuring Oracle WebLogic](#) on page 99.
- ❑ **Apache Tomcat** with or without Apache HTTP Server, see [Manually Configuring Apache Tomcat With or Without Apache HTTP Server](#) on page 100.

For other web and/or application servers, review the information for the servers above and consult your third party documentation for the corresponding steps.

Note: If you changed the default names for the WebFOCUS context root (/ibi_apps), substitute accordingly.

Configuring IBM WebSphere

This topic explains how to modify the IBM WebSphere Application Server for use with WebFOCUS.

It is assumed that WebSphere components are installed and configured and that a WebSphere Application Server has been created for use with WebFOCUS.

The WebFOCUS web application (webfocus.war) requires a shared library in order to override certain libraries provided by WebSphere.

Procedure: How to Create the WebSphere Application Server Shared Library

1. Create a new directory to use for the shared library. This directory must be accessible by the WebSphere Application Server user. For example:

```
mkdir -p /home/ibi/shared
```

2. Copy the following files from the ../ibi/WebFOCUS82/webapps/webfocus/WEB-INF/lib/ directory to the directory created in step 1.

- ❑ jackson*.jar
- ❑ http*.jar
- ❑ javax.persistence*.jar
- ❑ eclipselink-*.jar
- ❑ commons-*.jar

For example:

```
cp /home/ibi/WebFOCUS82/webapps/webfocus/WEB-INF/lib/jackson*.jar /home/ibi/shared
```

3. Sign in to the WebSphere Console.

4. Expand *Environment* and then expand *Shared Libraries*, as shown in the following image.

Shared Libraries

Use this page to define a container-wide shared library that can be used by deployed applications.

Scope: Cell=unxrh6Cell03

Show scope selection drop-down list with the all scopes option

Scope specifies the level at which the resource definition is visible. For detailed information on what scope is and how it works, [see the scope settings help](#).

Cell=unxrh6Cell03

Preferences

New... Delete

Select Name Description

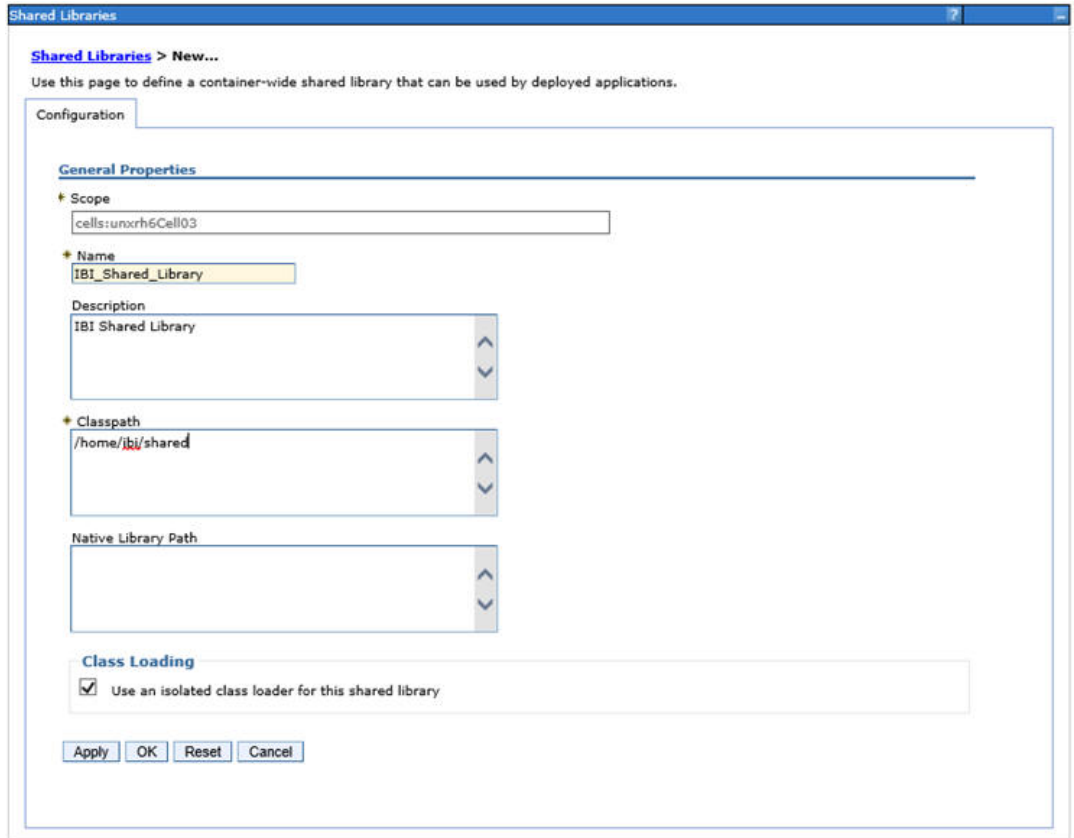
You can administer the following resources:

Select	Name	Description
<input type="checkbox"/>	IBI Jackson 1.9	Jackson 1.9 Library
<input type="checkbox"/>	IBI Shared_15215	
<input type="checkbox"/>	IBI Shared_383	Jackson.jar for confid 383
<input type="checkbox"/>	IBI Shared_408	Jackson.jar for confid=408
<input type="checkbox"/>	IBI Shared_414	Jackson.jar for confid=414
<input type="checkbox"/>	IBI Shared_512	
<input type="checkbox"/>	tiw57000_shared	

Total 7

5. From the Scope drop-down list, select the scope for your environment and then click *New*.

The Shared Libraries dialog box opens, as shown in the following image.



6. Provide the following values:
 - Name: IBI_Shared_Library
 - /home/ibi/shared
 - Select *Use an isolated class loader for this shared library*.
7. Click *OK* and then click *Save*.

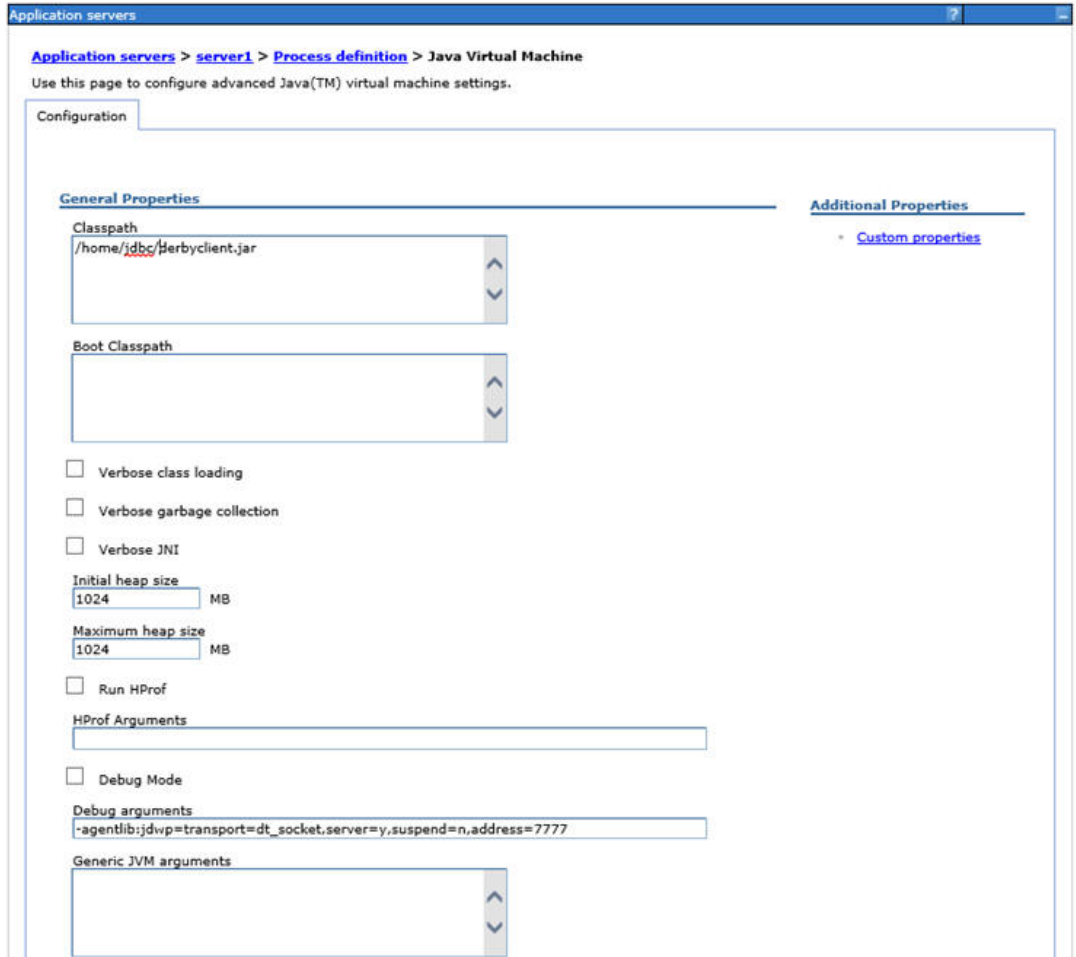
Procedure: How to Update the WebSphere Application Server Java Settings

The following additional settings are required by WebFOCUS.

1. Sign in to the WebSphere Console.

2. Expand Servers, Server Types, WebSphere application servers, your server, Server Infrastructure, Java and Process Management, Process definition, Additional Properties, and Java Virtual Machine.

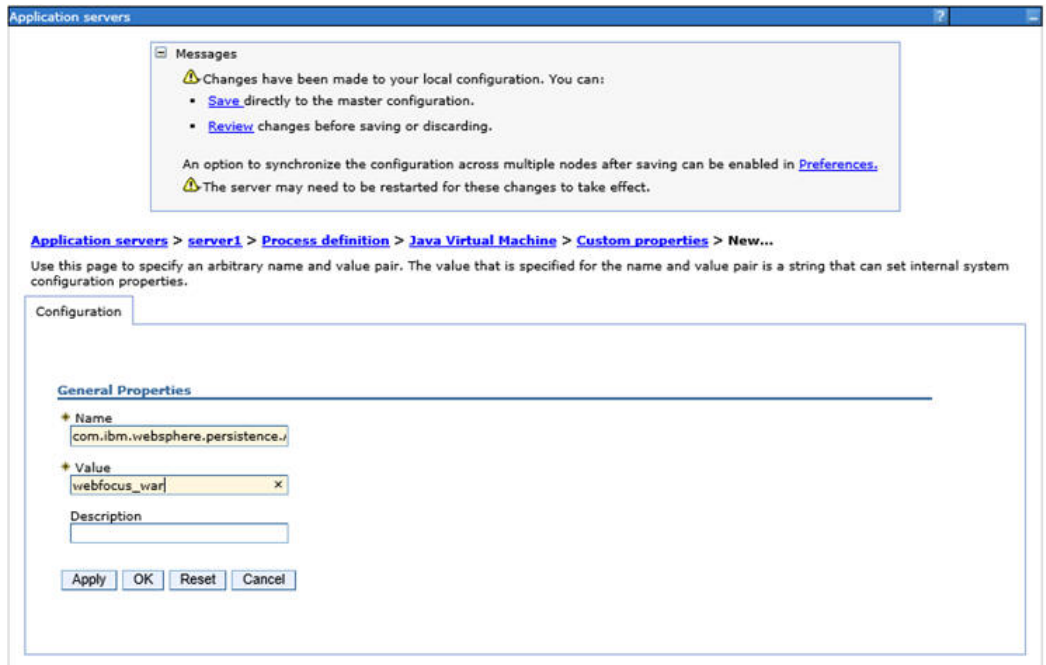
The Application servers Java Virtual Machine dialog box opens, as shown in the following image.



3. Update the following settings:
 - In the Classpath field, add the full path and name of the JDBC driver jar files required to access the WebFOCUS Repository database. If there is more than one, type one per line.
 - Change Initial Heap Size to at least 1024 (minimum, setting is in MB).

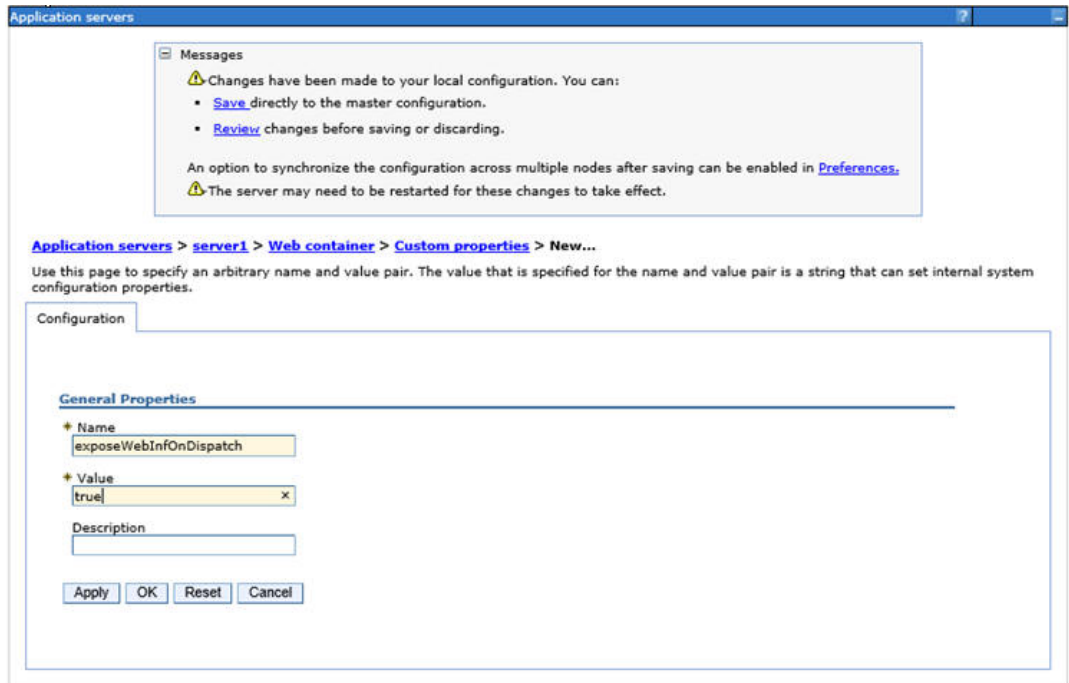
- Change Maximum Heap Size to at least 1024 (minimum, setting is in MB).
- 4. Click *OK*.
- 5. Expand *Servers, Server Types, WebSphere application servers, your server, Java and Process Management, Process definition, Java Virtual Machine, Custom properties, and New*.

The Application servers General Properties dialog box opens, as shown in the following image.



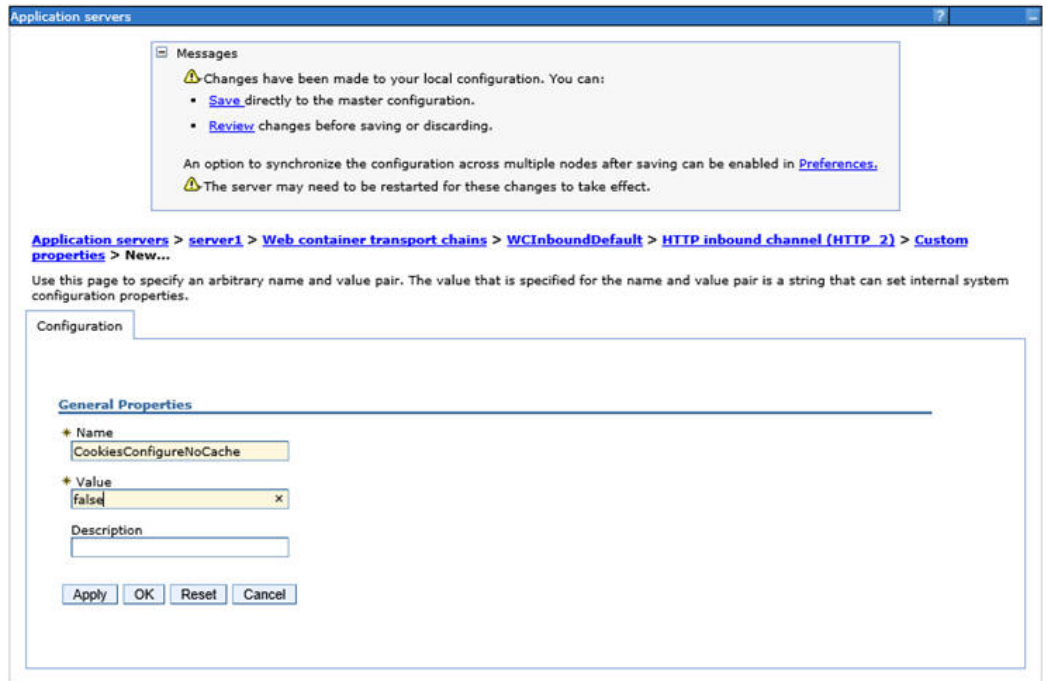
- 6. Update the following settings:
 - Name: com.ibm.websphere.persistence.ApplicationsExcludedFromJpaProcessing
 - Value: webfocus_war. This needs to match the name of the application when deployed. Modify this value to match the value you plan to use when deploying the webfocus.war web application.
- 7. Click *OK*.
- 8. Expand *Servers, Server Types, WebSphere application servers, your server, Container Settings, Web Container Settings, Web container, Custom properties, and New*.

The Application servers General Properties dialog box opens, as shown in the following image.



9. Update the following settings:
 - Name: exposeWebInfOnDispatch
 - Value: true
10. Click OK.
11. Expand Servers, Server Types, WebSphere application servers, your server, Container Settings, Web Container Settings, Web container transport chains, WCInboundDefault, HTTP inbound channel, Custom properties, and New.

The Application servers General Properties dialog box opens, as shown in the following image.



12. Update the following settings:

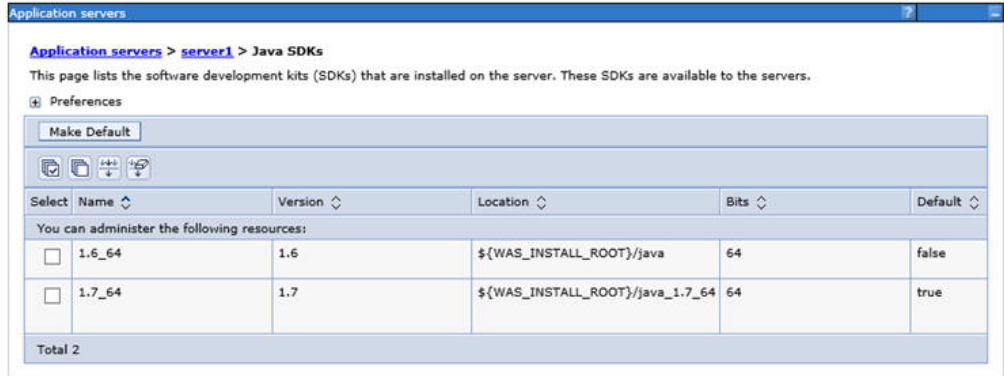
- Name: CookiesConfigureNoCache
- Value: false

13. Click *OK* and then click *Save*.

Procedure: How to Verify the WebSphere Application Server is Configured to Run Java 1.8

1. Sign in to the WebSphere Console.
2. Expand *Servers, Server Types, WebSphere application servers, your server, Server Infrastructure, and Java SDKs*.

The Application servers Java SDKs dialog box opens, as shown in the following image.

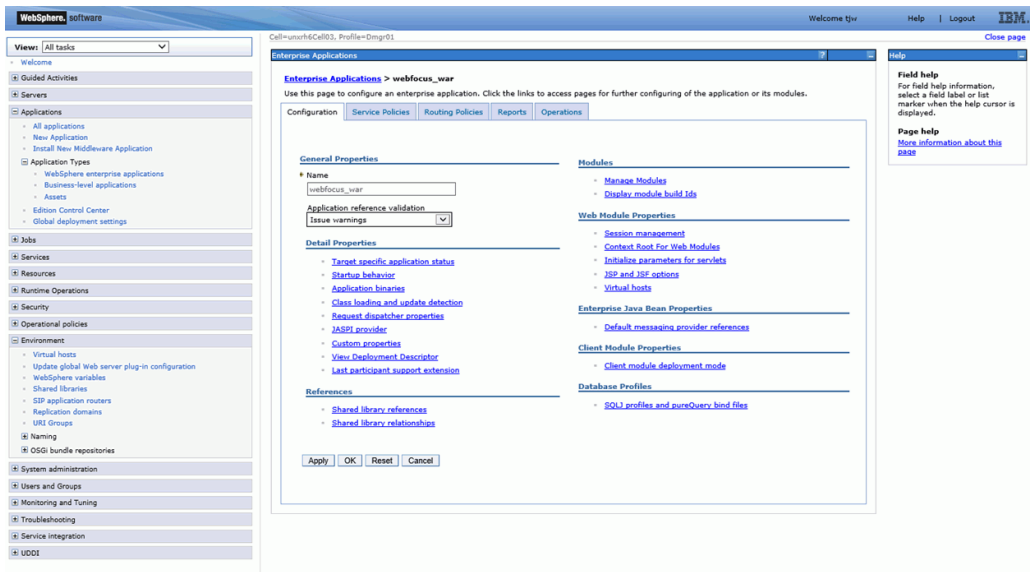


3. Verify that the Java 1.8 SDK, if present, is set to true. If not, contact your WebSphere Administrator and request your server be updated to utilize 1.8.

Procedure: How to Assign the IBI_Shared_Library to the WebFOCUS Web Application (webfocus.war)

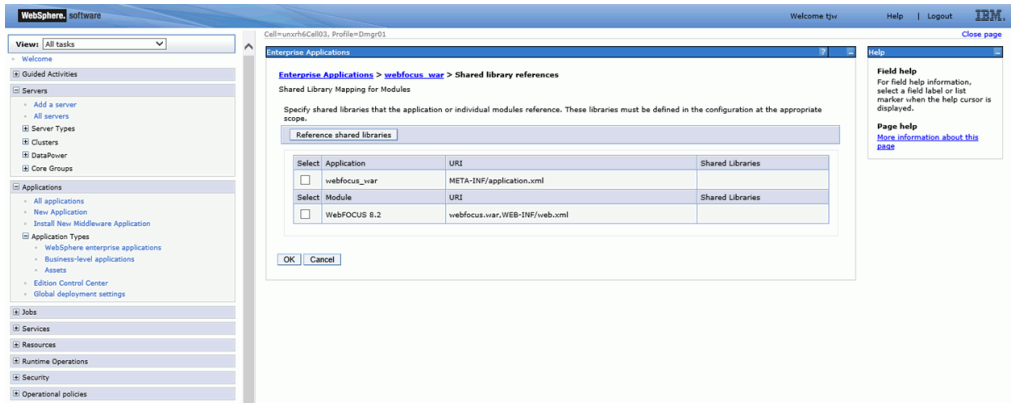
The following procedure assumes that the webfocus.war file has been deployed.

1. Sign in to the WebSphere Console.
2. Select *Applications, Application Types, WebSphere enterprise applications*, and your WebFOCUS web application, as shown in the following image.



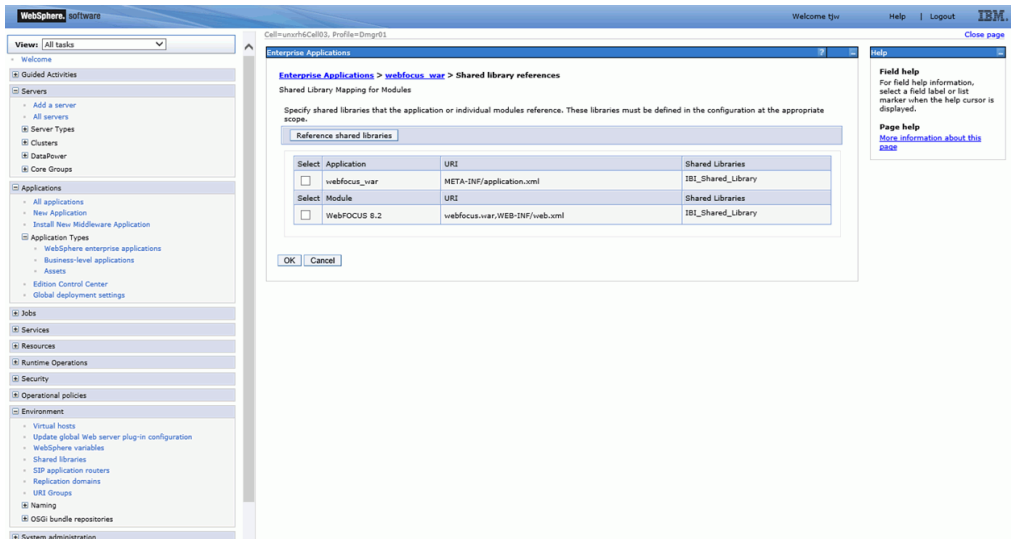
3. Select *Shared library references*.

The Shared library references panel displays, as shown in the following image.



4. Select one of the entries in the table and click *Reference shared libraries*.

Values populate in the Shared Libraries column, as shown in the following image.



5. From the Available list, select *IBI_Shared_Library*, click the right arrow, and then click *OK*. Repeat for the second entry.
6. Click *OK*, and then click *Save*.
7. Restart the WebSphere Application Server.

Note: It is not sufficient to only restart the WebFOCUS web application.

Configuring Oracle WebLogic

This section describes the pre-requisites and post-requisites for configuring the Oracle WebLogic® Application Server for use with WebFOCUS and ReportCaster. It is assumed that WebLogic components are installed and configured. For additional information, see the WebLogic documentation.

Java Version Requirement

In Release 8206, Java Version 8 is supported. The WebLogic server used to run the WebFOCUS Client must be configured to use a release of that is supported by the WebLogic version being used. Consult the WebLogic server documentation for supported Java releases and how to modify your Java version, if required.

Update Java Settings

Consult the WebLogic server documentation for instructions on where to place the updated settings in your environment.

- ❑ Java minimum memory settings: `-Xms1024m -Xmx1024m`
- ❑ Classpath: Add the full path and name of the JDBC driver jar files required to access the WebFOCUS Repository database.
- ❑ UNIX/Linux graphics: In order to display graphics, your DISPLAY variable must point to an available X server, or you can set the JAVA variable `-Djava.awt.headless=true`.
- ❑ Temp directory: To avoid potential conflicts, your Java temporary directory should point to a unique location. Create an empty directory on a local filesystem that is writeable to the user that the WebLogic Server is running as, and then set the following Java variable.

`-Djava.io.tmpdir=/fullpath/yourprivatetmpdir`

For example, if you are on a Linux system using a standalone WebLogic domain and the `startWebLogic.sh` script to start it, you could insert the following into the `bin/setDomainEnv.sh` script beginning on the second line:

```
USER_MEM_ARGS="-Xms1024m -Xmx1024m"
PRE_CLASSPATH="/path/ibi/derby/lib/derbyclient.jar"
DISPLAY=yourxserver:0.0
JAVA_OPTIONS="-Djava.io.tmpdir=/fullpath/yourprivatetmpdir"
```

WebLogic Post-Installation Step

Prior to deploying the webfocus.war web archive to WebLogic, you must perform the following steps.

1. Create a file called weblogic.xml in the ../ibi/WebFOCUS82/webapps/webfocus/WEB-INF directory with the following:

```
<?xml version="1.0" encoding="UTF-8"?>
<wls:weblogic-web-app
xmlns:wls="http://xmlns.oracle.com/weblogic/weblogic-web-app"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://java.sun.com/xml/ns/javaee
http://java.sun.com/xml/ns/javaee/ejb-jar_3_0.xsd
http://xmlns.oracle.com/weblogic/weblogic-web-app
http://xmlns.oracle.com/weblogic/weblogic-web-app/1.4/weblogic-web-
app.xsd">

  <wls:container-descriptor>
    <wls:prefer-application-packages>
      <wls:package-name>org.bouncycastle.util</wls:package-name>
      <wls:package-name>org.apache.commons</wls:package-name>
      <wls:package-name>org.opensaml</wls:package-name>
      <wls:package-name>org.eclipse.persistence</wls:package-name>
    </wls:prefer-application-packages>
  </wls:container-descriptor>
</wls:weblogic-web-app>
```

2. Recreate the webfocus.war web archive and call the new archive ibi_apps.war, the following assumes the jar command is in your path and that you want to use /ibi_apps as your WebFOCUS context root:
 - a. cd ../ibi/WebFOCUS82/webapps/webfocus
 - b. jar cf ../ibi_apps.war .
3. Deploy the ibi_apps.war archive in place of the webfocus.war.

Manually Configuring Apache Tomcat With or Without Apache HTTP Server

Note: If you chose the option for the WebFOCUS installation to install Tomcat, you can skip this chapter.

This section explains how to install and configure Apache Tomcat, with or without Apache HTTP web server. There are two configurations available when using Apache Tomcat:

- Tomcat can be used as both a web server and application server where all processing is done by Tomcat. This is referred to as a Tomcat stand-alone configuration.
- Tomcat can be used as an application server for Java processing, while Apache HTTP Server can handle the traditional static web content.

Note: You can also use Tomcat for all WebFOCUS processing and use the HTTP Server only to forward requests through a firewall. This is the recommended configuration.

This section contains information for installing and configuring Tomcat and setting up the connection between the HTTP and Tomcat Servers. If you are using the HTTP Server, it should already be installed. Apache HTTP Server 2 is recommended, but 1.3 should work.

Steps are the following:

1. If it is not installed, install Tomcat 8.
2. Set environment variables and create contexts to deploy WebFOCUS web applications, as explained in [Preparing Tomcat for WebFOCUS Configuration](#) on page 101.
3. If you are using Apache HTTP Server to serve WebFOCUS content, create aliases, as explained in [Configuring Apache HTTP Server](#) on page 105.
4. If you are using Apache HTTP Server, configure communications between Tomcat and the HTTP Server, as explained in [Connecting Apache HTTP and Tomcat Servers](#) on page 106.
5. Verify the configuration, as explained in [Verifying the WebFOCUS Configuration With Tomcat and Apache HTTP Server](#) on page 109.
6. When Apache Tomcat is configured to use Secure Sockets Layer (SSL), it is recommended for security reasons to allow communication only over the Transport Layer Security (TLS) 1.2 protocol.

To enable TLS 1.2 only, perform the following:

- a. Edit the \$CATALINA_BASE/conf/server.xml file.
- b. In the Connector port section add the following attribute:

```
sslEnabledProtocols="TLSv1.2"
```

- c. Save and close the file.
- d. Restart Apache Tomcat.

Preparing Tomcat for WebFOCUS Configuration

To prepare Tomcat for WebFOCUS, you need to choose how to create WebFOCUS graphs and add the ReportCaster JDBC driver.

Procedure: How to Configure Tomcat for WebFOCUS Graphs

To generate graphs, WebFOCUS Servlets either need access to an X Server or they can use the Java VM headless option. You can set either by editing the catalina.sh file.

- DISPLAY.** If an X Windows Server is available, you should set a DISPLAY environment variable.

Open the following file in a text editor:

```
/tomcat_home/bin/catalina.sh
```

Near the beginning of the file just after the commented section, add the appropriate DISPLAY definition. For example:

```
DISPLAY=xserver_host:0.0
export DISPLAY
TERM=xterm
export TERM
```

where:

```
xserver_host
```

Is the host name or IP Address of a machine that is running an X server.

Note: Graphs are not actually displayed on the machine you set to DISPLAY, but WebFOCUS Servlets must access this X Server to generate graphs. After finishing this chapter, be sure to review the tests to verify graphs in [Verifying and Troubleshooting Server Side Graphics \(PCHOLD\)](#) on page 127.

- ❑ **Headless.** If an X Windows Server is not available, you can set the headless Java VM option. However, be aware that headless does not support GIF files or the older WebFOCUS graph engine (GRAPH32). Open the following file in a text editor:

```
/tomcat_home/bin/catalina.sh
```

You can add the headless option by setting the \$JAVA_OPTS variable. Near the beginning of the file, just after the commented section, add the following line:

```
export JAVA_OPTS="${JAVA_OPTS} -Djava.awt.headless=true"
```

Procedure: How to Set the Tomcat CLASSPATH for the WebFOCUS Repository

Before a WebFOCUS application can connect to the WebFOCUS repository, you must first add the location of a JDBC driver to the CLASSPATH in setclasspath.sh.

1. Open the following file in a text editor:

```
/tomcat_home/bin/catalina.sh
```

2. Find the line that sets CLASSPATH. For example:

```
CLASSPATH=/home/oracle/oracle/ojdbc6.jar
```

Note: If there is more than one jar file, it should be appended, separated by a colon (:).

3. Append a colon followed by the path to the JDBC drivers for your repository. Include any ZIP or JAR files. For example:

```
CLASSPATH="$JAVA_HOME" /lib/tools.jar:/home/oracle/oracle/
ojdbc6.jar
```

Note: You must include the full path including the file name. Specifying a directory is not sufficient.

4. Save and close the editor.

Deploying WebFOCUS Web Applications With Tomcat

Configuring Tomcat mainly requires telling Tomcat where WebFOCUS files are located and the context roots in which to use them. For example, you must tell Tomcat to serve files from the WebFOCUS web application:

```
/install_directory/ibi/WebFOCUS82/webapps/webfocus
```

When it receives a request for the WebFOCUS context root:

```
http://TomcatHost:tomcatHTTPport/ibi_apps
```

By creating this context, you deploy the WebFOCUS web application.

- ❑ When using Tomcat as the application server and Apache HTTP Server as the web server, create only the following context on Tomcat:

Context (path): /ibi_apps

Directory (DocumentBase): /install_directory/ibi/WebFOCUS82/webapps/webfocus

The approot context is then created as aliases on the HTTP Server. The HTTP Server is then configured to send requests for ibi_apps to Tomcat. However, this assumes the HTTP Server handles some WebFOCUS content directly. If you want the HTTP Server to only forward requests through a firewall, do not create aliases on the HTTP Server, but instead configure Tomcat to handle all WebFOCUS content.

- ❑ When using Tomcat as both web and application server, the following contexts must be created:

Context (path)	Directory (DocumentBase)
/ibi_apps	/install_directory/ibi/WebFOCUS82/webapps/webfocus

Context (path)	Directory (DocumentBase)
<code>/ibi_help</code>	<code>/install_directory/ibi/WebFOCUS82/webapps/ibi_help</code>
<code>/approot</code>	<code>/install_directory/ibi/apps</code>

Tomcat can be used as both a web server and application server, so Tomcat can also serve files outside of a web application after it knows their location and context. On a traditional web server, you create aliases. With Tomcat, a traditional web server alias is treated like a context root, even when serving files outside of a web application.

Procedure: How to Create Contexts

There are several ways to create contexts:

- You can manually create individual XML files for each web application or context under `/tomcat_home/conf/Catalina/localhost`.
- You can edit `server.xml` to define contexts.
- You can copy `webfocus.war` to `/tomcat_home/webapps` and then rename it to `ibi_apps.war`.
- You can use the Tomcat web-based tools.

This procedure explains how to create contexts using the web-based tools. When you create a context for a web application, the web application is deployed.

To create contexts for Tomcat 8, Information Builders recommends creating or editing XML files in the following directory to define the contexts:

`/tomcat_home/conf/Catalina/localhost`

Reference: Reloading Web Applications

This is not a consideration if you just installed WebFOCUS for the first time, but you should be aware of it for when you install a service pack or new release. When you upgrade WebFOCUS or install a service pack, Tomcat must use the new web applications rather than cached copies of the old version.

- If you install a service pack in the same location and you had deployed the expanded directories, the new web applications should be used automatically, but you should remove the following work directories and then restart Tomcat.

`/tomcat_home/work/Catalina/localhost/ibi_apps`


```
/tomcat_home/work/Catalina/localhost/ibi_help
```

Note: The `redirect.war` file is available for redirecting custom applications with URLs containing `rcaster` as the ReportCaster context root. If you are planning to deploy this file, you should also remove the following work directory and then restart Tomcat:

```
/tomcat_home/work/Catalina/localhost/rcaster
```

- ❑ If you are installing in a different location or you deployed WAR files, you need to completely remove the existing WebFOCUS contexts and then recreate them. To remove contexts, you can use the Tomcat Manager Tool or remove the corresponding files and directories of the context. For example:

```
/tomcat_home/conf/Catalina/localhost/ibi_apps.xml
```

```
/tomcat_home/work/Catalina/localhost/ibi_apps
```

```
/tomcat_home/webapps/ibi_apps
```

Note: When you deploy WAR files, Tomcat expands them into its own directory structure and does not always know the original location.

Configuring Apache HTTP Server

Tomcat can be used with or without Apache HTTP Server.

- ❑ If you are using Tomcat without the HTTP Server, you should have created the `aproot` alias as a Tomcat context. If you are not using the HTTP Server, proceed to [Verifying the WebFOCUS Configuration With Tomcat and Apache HTTP Server](#) on page 109.
- ❑ If you are using Tomcat with the HTTP Server, you need to create aliases and configure communications between the HTTP Server and Tomcat.

To create aliases, edit the `httpd.conf` configuration file as explained below making sure to replace `install_directory` with the correct path on your machine. If you changed the default names for the WebFOCUS aliases and context root (`/ibi_apps`), substitute accordingly.

Procedure: How to Modify the Apache `httpd.conf` File

1. Using a text editor, open the `httpd.conf` file located in the `/apache_home/conf` directory.
2. Add the following lines in the Alias section making sure to use the correct `install_directory` on your machine:
 - ❑ Point an alias to the apps directory.

```
Alias /approot/ "/install_directory/ibi/apps/"
```

For example:

```
Alias /approot/ "/home/iadmin/ibi/apps/"  
Alias /icons/ "/usr/apache2/icons/"
```

3. Save and close the file.
4. Restart the HTTP Server.

Connecting Apache HTTP and Tomcat Servers

There are many different ways to connect from Apache HTTP Server to Tomcat. This section addresses JK1.2, `mod_jk`. If you wish to use another approach, such as ProxyPass or JK2, refer to Apache and Tomcat documentation.

The following files are needed for Apache to connect to Tomcat when using JK1.2:

`mod_jk.so`

Provides binary instructions for Apache to connect to Tomcat. See [How to Download or Build the mod_jk.so File](#) on page 106.

`workers.properties`

Provides configuration information needed by the `mod_jk.so` binary. See [How to Create the mod_jk.conf File](#) on page 108.

`mod_jk.conf`

Tells Apache to load the `mod_jk.so` binary and use settings in `workers.properties`. See [How to Create the workers.properties File](#) on page 107.

`httpd.conf`

Tells Apache to Include `mod_jk.conf`. See [How to Edit httpd.conf to Use JK1.2](#) on page 108.

Additional documentation on using the JK1.2 connector is available at:

<http://tomcat.apache.org/connectors-doc/index.html>

Procedure: How to Download or Build the `mod_jk.so` File

The `mod_jk.so` binary must be compiled specifically for your platform and Apache HTTP Server release (1.3 or 2.0). Binaries and source code can be downloaded from:

<http://jakarta.apache.org/tomcat/connectors-doc/index.html>

1. Test the WebFOCUS web application by going to the following URL in a browser:

http://TomcatHost:TomcatHTTPport/ibi_apps/diagnostics/about.jsp

A page should appear displaying information about the current build. For example:

`Version:WEB82`

If the page fails to load, restart Tomcat, and ensure it can compile JSP files. In some environments, the very first time a JSP file is compiled you might receive an error.

2. If you are using Tomcat as both web and application server, proceed to [Verifying the WebFOCUS Configuration With Tomcat and Apache HTTP Server](#) on page 109.

The binaries you download will have a long name indicating the platform and Apache release. You should rename this file to `mod_jk.so`.

If a binary is not available for your platform, you can download the source code and compile it. If you do an online search, you should be able to find information on compiling `mod_jk.so`. The compiled file may have a different name, such as `libmod_jk.so`.

The `mod_jk.so` file should be placed on your system in a directory to which the HTTP Server has at least read permissions.

Procedure: How to Create the `workers.properties` File

1. If the file does not exist, create the following file in a directory to which Apache HTTP Server has at least read permissions:

`workers.properties`

For example:

`/apache_home/conf/tomcat/workers.properties`

2. Open the file in a text editor to edit or add the following text to the file replacing text in italics with absolute paths:

```
workers.tomcat_home=tomcat_home
workers.java_home=java_homeps=/
worker.list=ajp13
worker.ajp13.port=8009
worker.ajp13.host=localhost
worker.ajp13.type=ajp13
```

where:

tomcat_home

Is the installation directory for Apache Tomcat. Use an absolute path.

java_home

Is the installation directory for the Java JDK. Use an absolute path.

8009

Is the Ajp13 port defined in server.xml. 8009 is the default, but if you changed this, provide the new value.

Procedure: How to Create the mod_jk.conf File

1. If the file does not exist, create the following file in a directory to which Apache HTTP Server has read access:

mod_jk.conf

For example:

/apache_home/conf/tomcat/mod_jk.conf

2. Open the file in a text editor to edit or add the following text to the file replacing *PATH_TO/* with absolute paths to the file in question:

```
<IfModule !mod_jk.c>
  LoadModule jk_module /PATH_TO/mod_jk.so
</IfModule>
JkWorkersFile "/PATH_TO/workers.properties"
JkLogFile "/PATH_TO/tomcat/jk1.2/mod_jk.log"
JkLogLevel emerg
JkMount /ibi_apps ajp13
JkMount /ibi_apps/* ajp13
```

Note: If you changed the default context roots, substitute accordingly.

Procedure: How to Edit httpd.conf to Use JK1.2

1. Using a text editor, open the httpd.conf file located in the */apache_home/conf* directory.
2. Add the following line to the end of the file specifying where the mod_jk.conf file is located on your system:

```
Include /PATH_TO/mod_jk.conf
```

Verifying the WebFOCUS Configuration With Tomcat and Apache HTTP Server

After finishing the configuration, run test calls to verify operability.

Procedure: How to Verify the WebFOCUS Configuration

1. If they are not started, start the following:

- Apache Tomcat
- WebFOCUS Reporting Server

2. Enter the following URL in your browser:

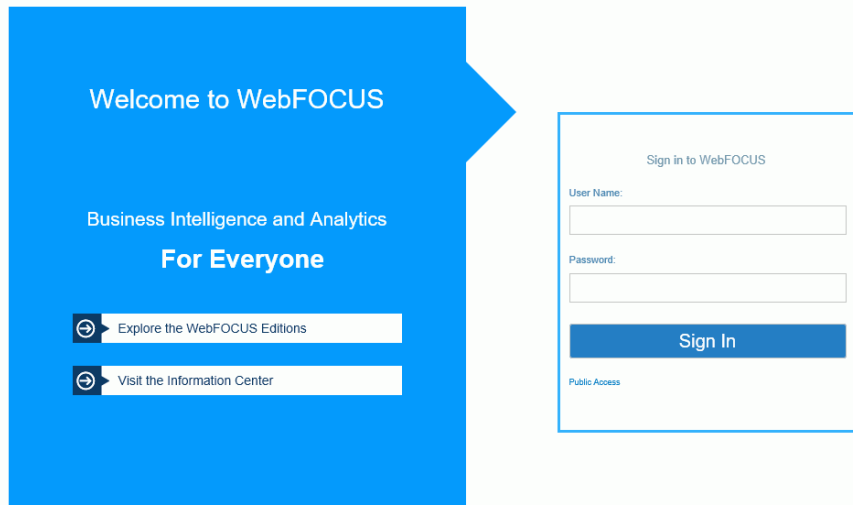
`http://hostname:port/ibi_apps`

where:

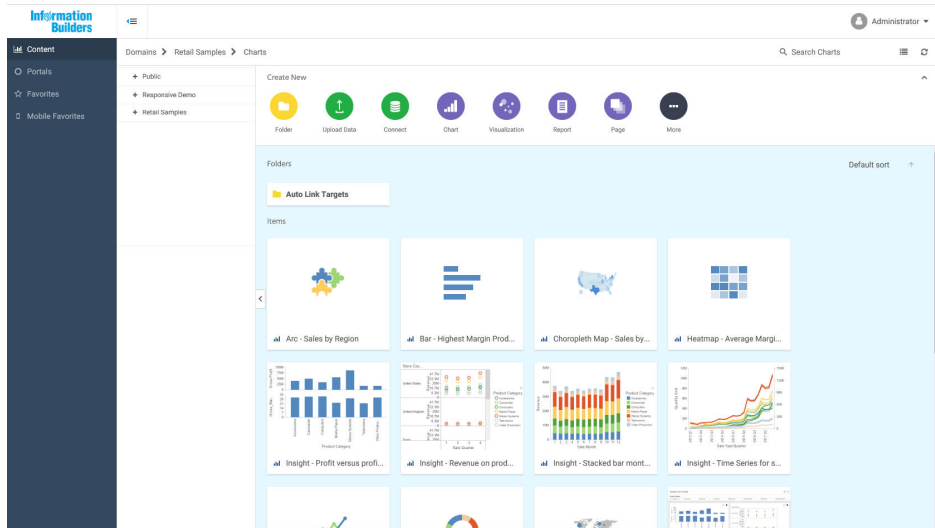
`hostname:port`

Are the host name and port of the web server. However, if you use an application server only configuration, then these are the host name and HTTP port of the application server. If you require SSL, use https instead of http.

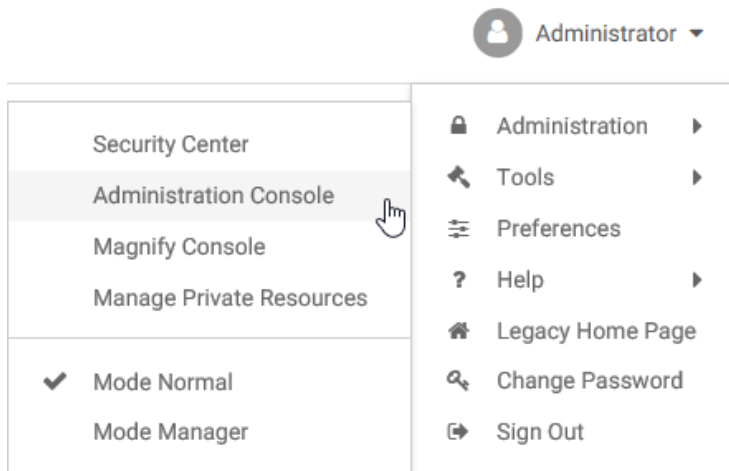
The WebFOCUS Sign In page opens, as shown in the following image.



3. Sign in as an administrator. The default user name and password is *admin* and *admin*. The WebFOCUS Home Page opens in your web browser.



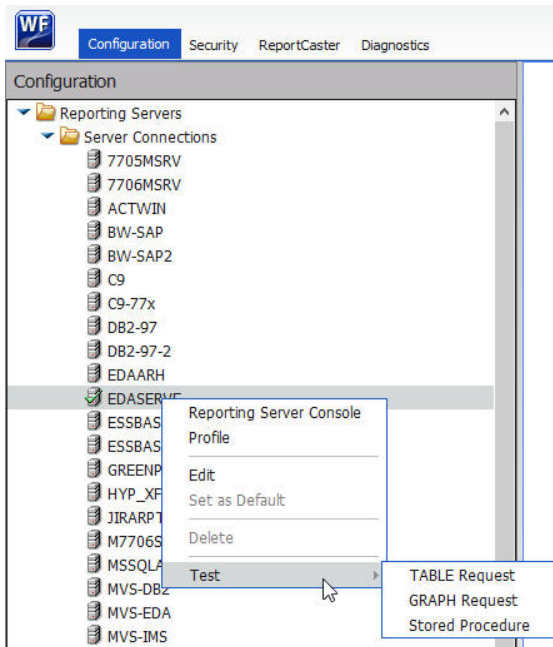
4. Click *Administrator* in the top pane, and then from the *Administration* menu, select *Administration Console*, as shown in the following image.



The WebFOCUS Administration Console opens.

5. Select the *Configuration* tab, expand *Reporting Servers*, and then expand *Server Connections*.

- Right-click a node, select *Test*, and then select *TABLE Request*, *GRAPH Request*, or *Stored Procedure*, as shown in the following image.



- Click *Run* to run the test procedure.

A procedure is normally launched using the WebFOCUS Servlet and a sample report should display. You can manually use a servlet to run a procedure, such as *carinst.fex*, using:

```
http://host:[port]/ibi_apps/WFServlet?IBIF_ex=carinst
```

- If you are using Tomcat stand-alone, proceed to [Post-Installation Verification and Configuration](#) on page 117.

Installing and Configuring JBoss EAP 6.0.x or 6.2.x

This topic describes how to install and configure JBoss EAP 6.0.x or EAP 6.2.x with WebFOCUS.

Procedure: How to Install and Configure JBoss

- To install JBoss from a zip file, unzip the file, as follows:

```
unzip jboss-eap-6.0.x.zip
```

This will create a subdirectory in the form *jboss-eap-6.0*.

2. Create an administration user, as follows:

```
cd install_dir/bin
./add-user.sh admin password
```

where *install_dir* refers to `/dir/jboss-eap-6.x/jboss-as`. This procedure assumes use of the standalone configuration.

3. If installing on a system that is running other JBoss instances or if the following ports are in use, edit the *install_dir*/standalone/configuration/standalone.xml file and change the following port assignments:

Note: There are additional ports listed in the standalone.xml file. If you are deploying WebFOCUS, only the services they support do not run and they are not used.

- 8080 - HTTP port
 - 8443 - HTTPS port
 - 8009 - AJP port
 - 4447 - Remote port
 - 9990 - Management HTTP port
 - 9999 - Management native port
4. If you are using Derby, the JBoss installation already contains the Derby JDBC driver. The default standalone configuration sets `java.awt.headless=true`. If you need to add another JDBC driver, change the headless setting, or change other JVM settings, edit the *install_dir*/bin/standalone.conf file. Search for JAVA_OPTS to headless setting or other JVM properties.
 5. Start JBoss so that all ports listen on all interfaces. Otherwise, by default, they will only listen on 127.0.0.1. As an alternative to all interfaces, you can specify a specific IP address to listen on, as follows.

```
cd install_dir/bin
./standalone.sh -b 0.0.0.0 -bmanagement=0.0.0.0
```

Note: To stop JBoss, press Ctrl+C.

Reconfigure the WebFOCUS Web Application Files

JBoss is delivered with log4j that is not compatible with WebFOCUS and conflicts with `ibi_help`. As a result, the WebFOCUS web applications need to be modified to use isolated class loaders and parent last class loading. The following modifications are required and assumes that you are in the `ibi/WebFOCUS82/webapps` directory. Note that the xml files created in each step are not identical.

APPROOT

```
mv approot.war approot-orig.war mkdir approot
cd approot
jar xf ../approot-orig.war cd WEB-INF
```

Create the `jboss-classloading.xml` file with the following:

```
<?xml version="1.0" encoding="UTF-8"?>
<classloading xmlns="urn:jboss:classloading:1.0" name="approot.war"
domain="approot.war" export-all="NON_EMPTY" import-all="true"
parent-first="false"
/>
```

```
cd ..
jar cf ../approot.war .
cd ..
```

IBI_HTML

```
mv ibi_html.war ibi_html-orig.war mkdir ibi_html
cd ibi_html
jar xf ../ibi_html-orig.war cd WEB-INF
```

Create the `jboss-classloading.xml` file with the following:

```
<?xml version="1.0" encoding="UTF-8"?>
<classloading xmlns="urn:jboss:classloading:1.0" name="ibi_html.war"
domain="ibi_html.war" export-all="NON_EMPTY" import-all="true"
parent-first="false"
/>
```

```
cd ..
jar cf ../ibi_html.war .
cd ..
```

IBI_HELP

```
mv ibi_help.war ibi_help-orig.war
cd ibi_help/WEB-INF (exploded directory already exists)
```

Create the `jboss-classloading.xml` file with the following:

```
<?xml version="1.0" encoding="UTF-8"?>
<classloading xmlns="urn:jboss:classloading:1.0" name="ibi_help.war"
domain="ibi_help.war" export-all="NON_EMPTY" import-all="true"
parent-first="false"
/>
```

```
cd ..
jar cf ../ibi_help.war .
cd ..
```

WebFOCUS will create the new war file as `ibi_apps.war` to pick up the correct context root, rather than add additional JBoss syntax to the xml files:

```
cd webfocus/WEB-INF (exploded directory already exists)
```

Create the `jboss-classloading.xml` file with the following:

```
<?xml version="1.0" encoding="UTF-8"?>
<classloading xmlns="urn:jboss:classloading:1.0" name="ibi_apps.war"
domain="ibi_apps.war" export-all="NON_EMPTY" import-all="true"
parent-first="false"
/>
```

Create the `WEB-INF/jboss-deployment-structure.xml` file with the following:

```
<jboss-deployment-structure>
  <deployment>
    <!-- Exclusions allow you to prevent the server from automatically
adding some dependencies -->
    <exclude-subsystems>
      <subsystem name="jpa" />
    </exclude-subsystems>
    <exclusions>
      <module name="org.apache.log4j" />
      <module name="org.apache.commons" />
      <module name="org.apache.http" />
      <module name="javaee.api" />
      <module name="javax.persistence.api" />
      <module name="org.hibernate" />
    </exclusions>
    <dependencies>
      <module name="javax.activation.api" export="true"/>
      <module name="javax.annotation.api" export="true"/>
      <module name="javax.ejb.api" export="true"/>
      <module name="javax.el.api" export="true"/>
      <module name="javax.enterprise.api" export="true"/>
      <module name="javax.enterprise.deploy.api" export="true"/>
      <module name="javax.inject.api" export="true"/>
      <module name="javax.interceptor.api" export="true"/>
      <module name="javax.jms.api" export="true"/>
      <module name="javax.jws.api" export="true"/>
      <module name="javax.mail.api" export="true"/>
      <module name="javax.management.j2ee.api" export="true"/>
      <module name="javax.resource.api" export="true"/>
      <module name="javax.rmi.api" export="true"/>
      <module name="javax.security.auth.message.api"
export="true"/>
    </dependencies>
  </deployment>
</jboss-deployment-structure>
```

```

        <module name="javax.security.jacc.api" export="true"/>
        <module name="javax.servlet.api" export="true"/>
        <module name="javax.servlet.jsp.api" export="true"/>
        <module name="javax.transaction.api" export="true"/>
        <module name="javax.validation.api" export="true"/>
        <module name="javax.ws.rs.api" export="true"
            services="export"/>
        <module name="javax.xml.bind.api" export="true"/>
        <module name="javax.xml.registry.api" export="true"/>
        <module name="javax.xml.soap.api" export="true"/>
        <module name="javax.xml.ws.api" export="true"/>
        <module name="javax.api" export="true"/>
    </dependencies>
</deployment>
</jboss-deployment-structure>

```

Edit the file `web.xml` and comment out the `distributable` tag by changing:

```
<distributable></distributable>
```

to the following:

```

<!-- <distributable></distributable> -->
cd ..
jar cf ../ibi_apps.war .
cd ..

```

Deploying and Undeploying the WebFOCUS Web Application Files

In JBoss EAP 6.0.x or 6.2.x, you can either use the Administration Console or the command line to deploy the WebFOCUS web application files. Using the Console requires transferring the war files to the system running the browser. The following demonstrates using the command line interface.

Deploy (the applications start as soon as they are deployed):

```

cd install_dir/bin
./jboss-cli.sh --connect --controller=localhost:9999 (or the new Management
native port if it was modified)
[standalone@localhost:9999 /] deploy
WF_install_dir/ibi/WebFOCUS82/webapps/approot.war
[standalone@localhost:9999 /] deploy
WF_install_dir/ibi/WebFOCUS82/webapps/ibi_html.war
[standalone@localhost:9999 /] deploy
WF_install_dir/ibi/WebFOCUS82/webapps/ibi_help.war
[standalone@localhost:9999 /] deploy
WF_install_dir/ibi/WebFOCUS82/webapps/ibi_apps.war
[standalone@localhost:9999 /] exit

```

Undeploy (the applications are stopped when they are undeployed):

```
cd install_dir/bin
[standalone@localhost:9999 /] undeploy approot.war
[standalone@localhost:9999 /] undeploy ibi_html.war
[standalone@localhost:9999 /] undeploy ibi_help.war
[standalone@localhost:9999 /] undeploy ibi_apps.war
[standalone@localhost:9999 /]
exit
```

Chapter 5

Post-Installation Verification and Configuration

This chapter explains verification and common configuration procedures.

In this chapter:

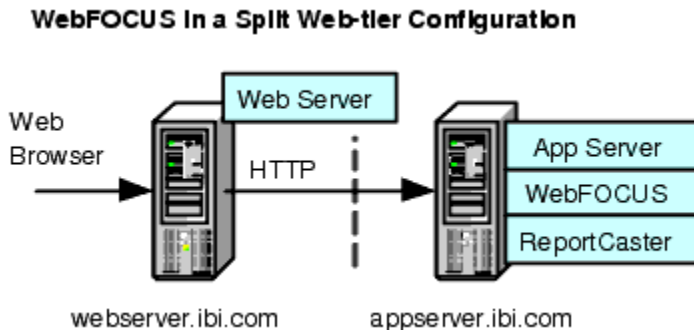
- ❑ [WebFOCUS Post-Installation Tasks](#)
- ❑ [WebFOCUS Repository Post-Installation Tasks](#)

WebFOCUS Post-Installation Tasks

This chapter explains verification and common configuration procedures for the WebFOCUS Client.

Configuring WebFOCUS in a Split Web-Tier and Application Server-Only Environment

In a split web-tier environment, all WebFOCUS web components run through the application server, and you should not create the `ibi_html` and `aproot` aliases on a web server. Instead, you can configure your application server to serve the content in the `install_directory/ibi/apps` directory.



The steps for configuring WebFOCUS to run only in an application server configuration is similar to split web-tier, in that you configure the application server to serve static content from the `ibi_html` and `apps` directories.

The one difference is where the ReportCaster Default Library URL is pointing. With split web-tier, this setting points to the web server. In an application server-only configuration, it points to the application server.

Using the Static Content Server Option

WebFOCUS installs a pair of web applications into the *install_directory/ibi/WebFOCUS82/webapps* directory, which are designed to serve static content from the file system to the browser:

- aproot.war*. Serves content from the *install_directory/ibi/apps* directory.
- ibi_html.war*. Serves content from the *install_directory/ibi/WebFOCUS82/ibi_html* directory.

Deploy one or both of these applications to address the following split web-tier and stand-alone application server configurations:

- The web server is unable to access the static content because it is located on the application server machine.
- There is no web server and you wish to use an application server by itself.

Note: Tomcat can be used by itself without these applications because it can map a directory on the file system to a context path.

Each application includes a deployment descriptor (*webconfig.xml*) that is used to locate the directory containing its configuration file. The context parameter *IBI_Configuration_Directory* in *webconfig.xml* is updated during installation to point to *install_directory/ibi/WebFOCUS82/config*, which contains the configuration file *aprootConfig.xml*. The configuration file is shared by both content server applications even though its name suggests it would be used by only one. The configuration file is used to maintain MIME mappings, the physical path of the directories being served, and the logging level.

The applications also include a Log4J property file (*log4j.xml*), which contains the path to the log file used by each application. The installation updates each *log4j.xml* file with the path to its own log file, *install_directory/ibi/WebFOCUS82/logs/wfaproot.log* and *install_directory/ibi/WebFOCUS82/logs/wfibihtml.log*, respectively.

The content server applications roll the log files over daily by appending the date to the log file and creating a new one (for example, *wfibihtml.log.2016-01-01*). You can increase the log level by editing *install_directory/ibi/WebFOCUS82/config/aprootConfig.xml* and changing the log level setting to *DEBUG*, *INFO*, *WARN*, *ERROR*, or *FATAL*, where *DEBUG* is the most verbose.

There are special considerations for using the content server option in a clustered web-tier environment.

Reference: Using the IBIARCFG and IBIARLOG –D Options With the Content Server Web Applications

Generally speaking, the approach of specifying a fully qualified path to the configuration file (aprootConfig.xml) in webconfig.xml and of specifying a fully qualified path to the log files in log4j.xml is sufficient for most installations. These paths are properly set during installation.

However, there is an option to pass the content servers these paths from the Java VM command line. To do this, complete the following steps:

1. Edit the WebFOCUS webconfig.xml file found inside both the aproot.war and ibi_html.war files. Replace the fully qualified path defined in the IBI_Configuration_Directory parameter with the notation shown below.

```
<context-param>
  <param-name>IBI_Configuration_Directory</param-name>
  <param-value>${IBIARCFG}</param-value>
</context-param>
```

2. Edit the WebFOCUS log4j.xml file located in the aproot.war file and replace the fully qualified path specified by the File parameter, as follows:

```
<param name="File" value="${IBIARLOG}/wfaproot.log"/>
```

3. Edit the WebFOCUS log4j.xml file located inside the ibi_html.war file and replace the fully qualified path specified by the File parameter, as follows:

```
<param name="File" value="${IBIARLOG}/wfibihtml.log"/>
```

4. Add the following –D options in the manner appropriate for the Java VM for your application server.

The settings below are slightly different in a clustered web-tier environment.

```
-DIBIARCFG=install_directory/ibi/WebFOCUS82/config
-DIBIARLOG=install_directory/ibi/WebFOCUS82/logs
```

WebFOCUS Client Verification and Configuration

To configure the WebFOCUS Client, edit files either through a text editor or the WebFOCUS Administration Console. The WebFOCUS Administration Console also provides tools to verify the installation.

For NLS configuration information, see the *WebFOCUS Security and Administration* manual.

Accessing the WebFOCUS Home Page

WebFOCUS 8.2 contains a Home Page from which you can access WebFOCUS interfaces, such as the WebFOCUS Administration Console.

Procedure: How to Access the WebFOCUS Home Page

1. Ensure that the web or application servers are started and configured.
2. Using a browser, navigate to the following page:

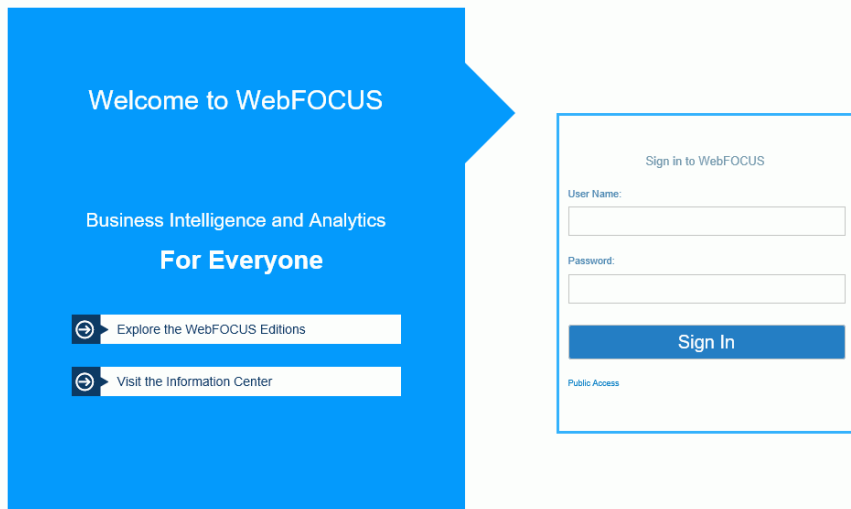
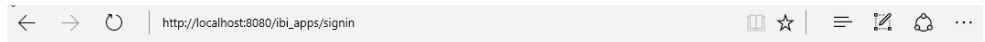
`http://hostname:port/ibi_apps/`

where:

`hostname:port`

Are the host name and HTTP port of the web server or application server. If you require SSL, use *https* instead of *http*.

The WebFOCUS Sign In page opens, as shown in the following image.



Note: If you receive a *page not found* error, ensure that your application server is started and that you have deployed the WebFOCUS application. For more information on configuring your application server, see [Installing the WebFOCUS Client](#) on page 47.

3. Enter the following default credentials:

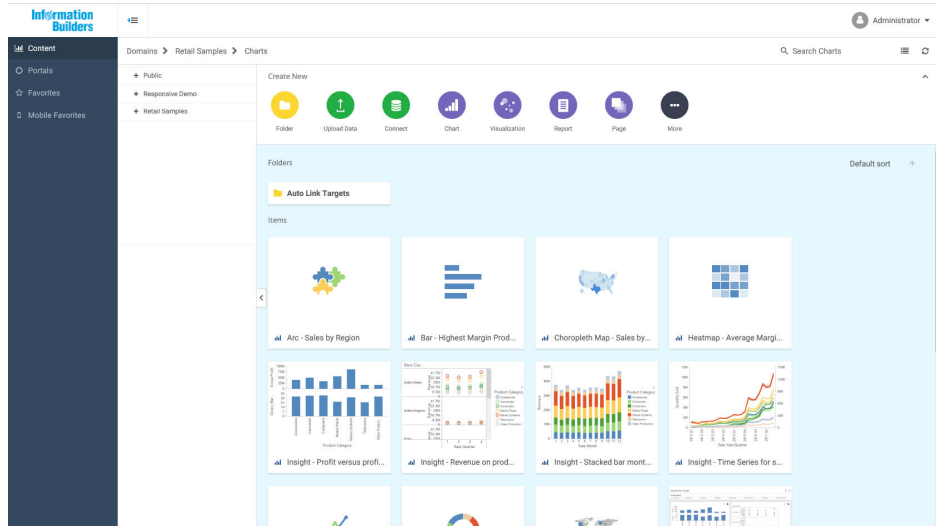
User Name: *admin*

Password: *admin*

Note: If you receive an *invalid user name or password* error, ensure that the WebFOCUS repository has been created and contains initial table data.

4. Click *Sign In*.

The WebFOCUS Home Page displays, as shown in the following image.



You can change the default credentials using the Security Center facility. Click *Administration* from the top menu, and then select *Security Center*. For more information, see the *WebFOCUS Security and Administration* manual.

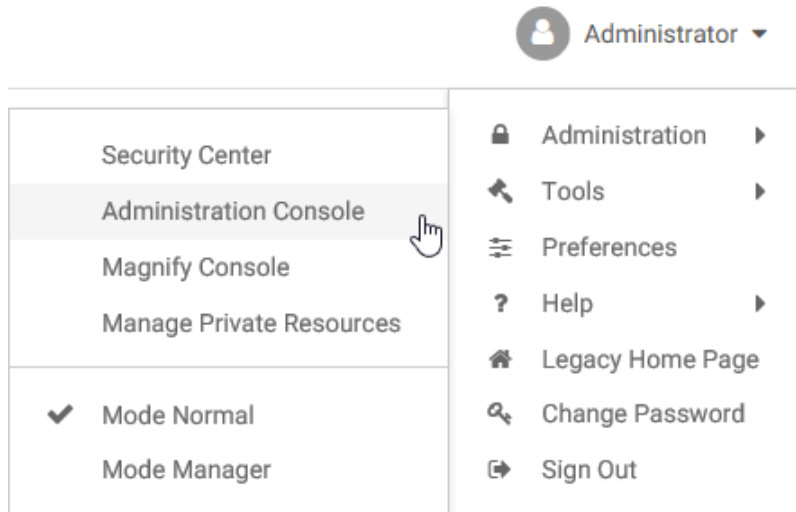
Accessing the WebFOCUS Administration Console

You can access the WebFOCUS Administration Console from the WebFOCUS Home Page, or you can access the WebFOCUS Administration Console directly from the browser by supplying its URL.

Procedure: How to Access the WebFOCUS Administration Console

1. Ensure that the web server and application server are started and configured.

2. Sign in to the WebFOCUS Home Page, click *Administration* from the top menu, and select *Administration Console*, as shown in the following image.



You can also manually enter the following URL in your browser:

[http\(s\)://machine:port/context/admin](http(s)://machine:port/context/admin)

where:

machine

Is the network ID of your computer.

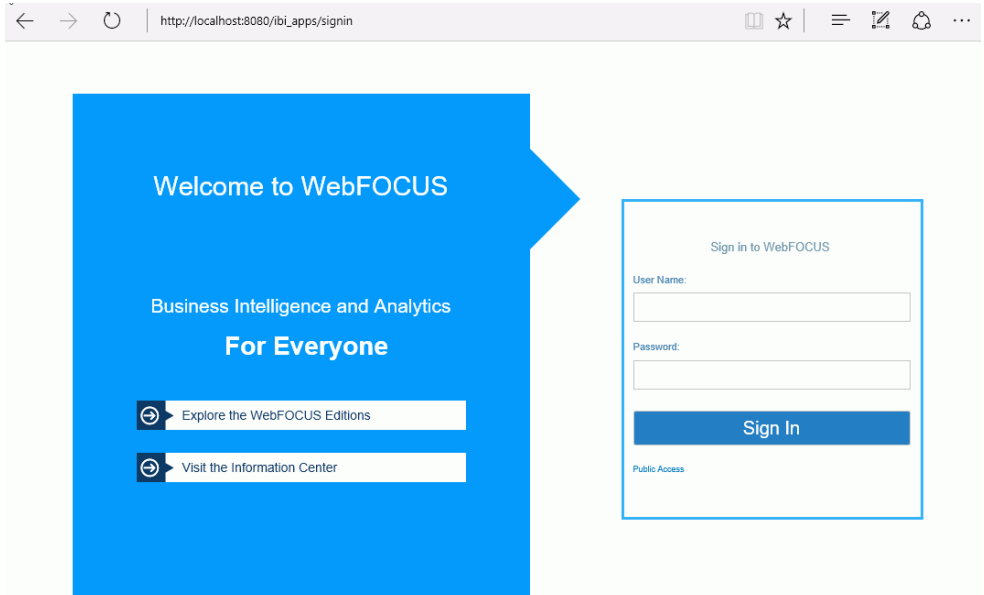
port

Is the number of the port that connects your computer to the server hosting WebFOCUS.

context

Is the local address for WebFOCUS. For example, *ibi_apps*.

The WebFOCUS Sign In page opens, as shown in the following image.

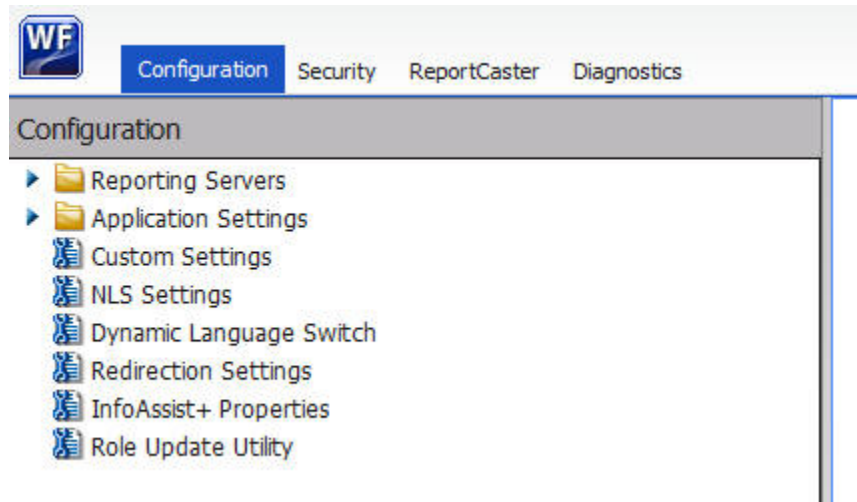


If a sign-in page does not appear, ensure that your web server and application server are started and configured.

3. Sign in using an administrator user ID. By default, *admin* is a valid administrator ID, and the password is *admin*.

Note: After you have verified the WebFOCUS Client configuration, change the password of the default administrator user ID, which is *admin*. For more information on WebFOCUS Client security, see the *WebFOCUS Security and Administration* manual.

The WebFOCUS Administration Console opens, as shown in the following image.



Using this console, you can edit the WebFOCUS Client communication and security settings. This console is documented in the *WebFOCUS Security and Administration* manual and relevant sections are available by clicking *Help*.

Running the Verification Tool

The WebFOCUS Administration Console contains a verification tool to further test the configuration.

Procedure: How to Run the Verification Tool

1. Select the *Diagnostics* tab.
2. Click *Client Verification*.
3. Review the test results and troubleshoot accordingly.

For troubleshooting assistance, see [Troubleshooting WebFOCUS and ReportCaster](#) on page 149.

Setting WebFOCUS Administration Console Authentication

It is a good idea to set authentication for the WebFOCUS Administration Console. The WebFOCUS Administration Console does not have its own authentication mechanism and by default, none is used.

If you wish to set authentication for the console, you can choose to do this through the WebFOCUS Reporting Server or the web server. For more information, see the *WebFOCUS Security and Administration* manual.

Defining Communications to WebFOCUS Reporting Servers

WebFOCUS Client communication settings are stored in the following file:

```
/install_directory/ibi/WebFOCUS82/client/wfc/etc/odin.cfg
```

This file contains node blocks defining WebFOCUS Reporting Servers that the client accesses. A node block is a set of parameters that define a server, listener, or other communication component.

When you installed the WebFOCUS Client, you specified a default WebFOCUS Reporting Server that the client accesses.

To change connection information for the default server or define additional servers, use the procedures that follow.

Procedure: How to Define WebFOCUS Reporting Servers

1. On the left pane of the WebFOCUS Administration Console, expand *Reporting Servers*.
2. Expand *Server Connections*.

The left pane displays all defined WebFOCUS Reporting Servers. To edit parameters of a defined WebFOCUS Reporting Server, right-click the node and select *Edit*.

3. To define an additional node, right-click *Server Connections* and select *New*.
4. Enter a unique name for the new node. Use this name when you wish to access the server.

This page lets you choose to define a single server (*Client*), *CLM Processing*, or a *Cluster* node. A cluster node is a node that consists of multiple servers. When the client accesses the cluster, it chooses one of the servers in that cluster. This is used for load balancing and failover. The best way to use clusters is through the Cluster Manager component that you can optionally add to your WebFOCUS environment.

5. Click *Next*.
6. Complete the HOST and PORT fields.

The remaining fields are optional in most environments.

Note: Setting the User ID and Password here is not recommended and may not have the desired result.

7. Click *Save*.
8. On the top of the page, click *Clear Cache* so your changes take effect.

Procedure: How to Set the Default WebFOCUS Reporting Server

When you make a connection from client to server without specifying a server, the default server is used. The default server and many other settings are set in the following file:

`/install_directory/ibi/WebFOCUS82/client/wfc/etc/cgivars.wfs`

1. From the Administration Console, select the *Configuration* tab, expand *Reporting Servers*, and then expand *Server Connections*.
2. Right-click the node name and select *Set as Default*.
3. On the Administration Console menu bar, click *Clear Cache*.

Enabling Active Technologies

Although most WebFOCUS Client features are configured through the WebFOCUS Administration Console, some features are enabled and configured through the WebFOCUS Reporting Server. If you license Active Technologies, you must provide the Active Technologies license code in the WebFOCUS Reporting Server Web Console.

Procedure: How to Enable Active Technologies

1. Sign in to the WebFOCUS Reporting Server Web Console.
2. Click the *Workspace* tab.
3. Click *License* on the ribbon.
4. Type your Active Technologies license in the *license_active_report* field, and click *Save and Restart Server*.

Active Technologies for Adobe Flex Consideration

The Flex Software Development Kit (SDK) is no longer shipped with the WebFOCUS Reporting Server.

If you use the FLEX or APDF output formats, you must download your own version of the Flex SDK from <http://flex.apache.org> and include *FlexSDK_download_location/lib/flex-compiler-om.jar* file in your CLASSPATH setting in *edaenv.cfg*. In addition, you must copy the *arFlexLib.swc* from *\$EDAHOME/etc* to the *FlexSDK_download_location/frameworks/libs* directory prior to server startup. For more information, contact your system administrator.

Setting Tomcat HTTP POST Maximum Size

As a default, Apache Tomcat sets the maximum size limit to 2097152 (2MB) limit for accepting HTTP POST requests. Since EXL07 MIME files can easily reach this limit, ExcelServlet will fail with a HTTP 400 error or produce a corrupted .XLSX file. To fix this problem, Tomcat needs to be configured by setting an attribute in the server.xml file.

In the `/tomcat_home/conf/server.xml` file, add the `maxPostSize` attribute and set it to `-1` to disable the limit check. The following example demonstrates this with the `<Connector port>` element block:

```
<Connector port="8080" protocol="HTTP/1.1"
connectionTimeout="20000"
redirectPort="8443" maxPostSize="-1" />
```

Verifying and Troubleshooting Server Side Graphics (PCHOLD)

This section explains how to verify and troubleshoot the most common type of graphs. By default, WebFOCUS graphs are generated through the web or application server using a Java-based graph engine installed with WebFOCUS Client. This is known as Server Side Graphics or PCHOLD. Using this approach, a complete graph file is created on the web or application server and then sent to a browser.

For the graph engine to create Server Side Graphics, you must configure your application server, as explained in [Configuring Web and Application Servers](#) on page 87. To do this, you either set the `DISPLAY` environment variable or use the headless Java VM option:

❑ DISPLAY

If an X Windows Server is available, set a `DISPLAY` variable to the X Windows Server and ensure the X Server accepts the connection. This supports all WebFOCUS graph options. For more information, see [How to Use Server Side Graphics by Settings DISPLAY](#) on page 127.

❑ Headless Java VM Option - GIF files are not supported.

See [How to Use Server Side Graphics With the Headless Java Option](#) on page 128 for more information.

Procedure: How to Use Server Side Graphics by Settings DISPLAY

The `DISPLAY` variable of your application server must be set to an X server. See [Configuring Web and Application Servers](#) on page 87 for information on setting `DISPLAY`. This can be set in the `.profile` of the user ID that runs the application server or the application server startup script.

For example:

```
export DISPLAY=xserverHostname:0.0
```

```
export TERM=xterm
```

If your UNIX machine does not have an X server, you can install an X Server on a Windows machine and set DISPLAY to that Windows machine.

In addition, the X Server must accept requests from the web and/or application server. On some UNIX platforms, the X Server is set by default to refuse connections, even when DISPLAY is set to localhost:0. On these machines, one solution is to sign in to the physical machine and start an X session. Then, open a shell and use the xhost command to specify hosts that will connect to the X server. For example:

```
xhost +localhost
```

The xhost command is installed with your X Windows environment and may not be in your PATH by default. After issuing the xhost command, leave this user logged on so that an X session remains running. To protect the machine, lock the display instead of logging off. If a different user needs to sign in to the physical machine or the machine is rebooted, the xhost command should be reissued on sign in and an X session left running.

Procedure: How to Use Server Side Graphics With the Headless Java Option

If an X Server is not available, the headless option can be set. This is a Java VM option and not a WebFOCUS specific feature. It is set at the application server level:

```
-Djava.awt.headless=true
```

Review your application server documentation and see [Configuring Web and Application Servers](#) on page 87. After setting Java options, completely restart your application server.

Note: If you change the default WebFOCUS Graph settings to use SSG_EXTERNAL=YES, then it should also be set through the WebFOCUS Administration Console under *Configuration* and *Graph* in the *IBJAVACMD* field.

Configuring a Reverse Proxy for Apache Tomcat

If you are planning to use a reverse proxy configuration with an Apache Tomcat application server, you must configure a setting in the server.xml file to ensure that all URL calls use the address of the web-facing proxy server as opposed to the internal server.

Procedure: How to Modify the Apache Tomcat Server.xml File

To modify the server.xml file:

1. Navigate to the following directory:

```
/tomcat_home/conf
```

where:

```
tomcat_home
```

Is the location on your system where Apache Tomcat is installed.

2. Edit the server.xml file.
3. Search for the Coyote/JK2 AJP 1.3 connector block.
4. Add the proxyName and proxyPort parameters, as shown in the following example:

```
<!-- Define a Coyote/JK2 AJP 1.3 Connector on port 8009 -->
<Connector port="8009" enableLookups="false" redirectPort="8443"
  debug="0" protocol="AJP/1.3" proxyName="WEB-FACING_PROXY_SERVER"
  proxyPort="WEB_FACING_PROXY_PORT" />
```

5. For the proxyName parameter value, specify the host name of the web-facing proxy server.
6. For the proxyPort parameter value, specify the port number of the web-facing proxy server.
7. Save the changes to the server.xml file.
8. Restart the Apache Tomcat application server.

WebFOCUS Repository Post-Installation Tasks

This section explains how to create the WebFOCUS Repository and verify the WebFOCUS Client configuration.

For NLS configuration information, review this section and consult the *WebFOCUS Security and Administration* manual.

WebFOCUS Repository Table Creation

This section explains how to create the WebFOCUS Repository.

The table creation utility creates or drops and creates all Repository tables. To drop and re-create only specific table groups, you can use utilities available with your database software. This is useful if you wish to remove all library data, but keep your schedules and address books.

Procedure: How to Create the WebFOCUS Repository Tables

To create the Repository tables:

1. Ensure that the database server is available and/or started.
2. From the Unix shell, navigate to the following WebFOCUS Utility directory:

```
install_directory/ibi/WebFOCUS82/Utilities/WFReposUtil
```

3. Execute the following command:

```
WFReposUtilCMDLine.sh
```

The following prompt is displayed:

```
Please select mode option for WFReposUtil:
1\) create           - create non-existing tables
2\) create_or_extend - create tables or add missing columns to tables
3\) insert           - insert data into tables
4\) create_insert    - combo of above
5\) update           - update table data
6\) drop             - drop tables
7\) extract          - export database data to xml files
8\) create_ddl       - generate SQL scripts but not execute them
Q\) Quit
  Enter selection [default=4] :
```

4. If this is a new installation and you need to create a new WebFOCUS Repository, press the Enter key to use the default option, 4 create_insert.

This option will create tables and load initial values into the WebFOCUS Repository, which are required to begin using the product.

5. If you typed option 3, insert, or option 4, create_insert:

- a. When you receive a prompt to enter the Database Repository Username, type the name of a valid user that has permission to create and alter tables in your Database Repository, and then press Enter.
- b. When you receive a prompt to enter the Database Repository Password, type the Password associated with the valid Database Repository user that you typed in sub-step a, and then press Enter.

These values give the utility the authority to open the Database Repository and execute the insert or create insert commands.

- c. When you receive a prompt to enter the WebFOCUS Administrator ID, type a new User ID, and then press Enter.
- d. When you receive a prompt to enter a Password for the ID entered, type a new Password, and then press Enter.

These values become the new WebFOCUS Administrator User ID and Password. Be sure to type a User Name and Password that you can refer to in future operations.

Note: The special characters " \$ are not permitted in the WebFOCUS Administrator User ID and Password during the create process.

6. If you typed any other option:
 - a. When you receive a prompt to enter the Database Repository Username, type the name of a valid Database Repository user that has permission to create and alter tables in your database, and then press Enter.
 - b. When you receive a prompt to enter the Database Repository Password, type the Password associated with the valid Database Repository user that you typed in sub-step a, and then press Enter.

These values give the utility the authority to open the Database Repository and execute the command you selected in step 6. Therefore, the User ID you type must have permission to create and alter tables in your database.

7. You are prompted to choose a logging level for the utility:

```
Please select logging level option for WfReposUtil:
1) off
2) severe
3) warning
4) info
5) config
6) fine
7) finer
8) finest
Q) To Quit
```

If selected, the log file named WfReposUtilCmdLine.log will be created in the following directory:

```
/install_directory/ibi/WebFOCUS82/Utilities/WfReposUtil
```

This utility uses the connection and sign-in information provided during the installation of WebFOCUS.

8. If you receive a message listing an error and stating that the creation of the WebFOCUS Repository failed, open the WfReposUtilCmdLine.log file and review the log to identify the specific error messages that occurred at the time the utility terminated.

Error messages can be generated by connection failures, the presentation of invalid database credentials, or failed attempts to connect to an inaccessible database.
9. If you receive a message stating that the creation of the WebFOCUS Repository completed successfully, you can type Exit to close the Unix shell.

Note:

- ❑ If the utility cannot connect to the database, ensure that the proper path to the JDBC driver appears in the following CLASSPATH value:

`/install_directory/ibi/WebFOCUS82/ReportCaster/bin/classpath`

- ❑ If the WebFOCUS installation program installed and configured Derby, this driver may be located as follows:

`/install_directory/ibi/derby/lib/derbyclient.jar`

If you are using a DB2 Repository, then an appropriate driver may be located as follows:

`/QIBM/ProdData/HTTP/Public/jt400/lib/jt400.jar`

Consult your database documentation for additional information.

- ❑ If you can connect to the database, but cannot create tables, ensure that the ID you typed for the database during the WebFOCUS installation has create permissions. You can change this User ID, as explained in [Post-Installation Verification and Configuration](#) on page 117.

WebFOCUS ReportCaster Post-Installation Tasks

This section explains ReportCaster post-installation tasks.

In this chapter:

- [ReportCaster Verification](#)
 - [Importing and Exporting the ReportCaster Configuration File](#)
 - [ReportCaster Configuration](#)
-

ReportCaster Verification

After the repository is created, you should test the WebFOCUS Client and the ReportCaster configuration.

If you have problems with the verification, see [Troubleshooting WebFOCUS and ReportCaster](#) on page 149.

Make sure you have carried out the procedures in the preceding chapters before starting the Distribution Server.

Before starting or testing the Distribution Server, components it communicates with must be started. These include the following:

- Web server
- Application server where the WebFOCUS web application is deployed
- WebFOCUS Reporting Server
- Database Server containing WebFOCUS Repository tables
- Mail Server
- FTP Server (if using FTP)

Testing the WebFOCUS Client

This section describes how to test the WebFOCUS Client.

Procedure: How to Test the WebFOCUS Client

1. Ensure the web and application servers are started and configured.
2. Go to the following page using a browser:

http://hostname:port/ibi_apps/

where:

hostname:port

Are the host name and HTTP port of the web server or application server. If you require SSL, use *https* instead of *http*.

The WebFOCUS Sign In page opens.

Note: If you receive a *page not found* error, ensure that your application server is started and that you have deployed the WebFOCUS application. For more information on configuring your application server, see [Installing the WebFOCUS Client](#) on page 47.

3. Enter the following default credentials:

User Name: *admin*

Password: *admin*

Note: If you receive an *invalid user name or password* error, ensure that the WebFOCUS repository has been created and contains initial table data.

4. Click *Sign In*.

The WebFOCUS Home page opens.

You can change the default credentials using the Security Center facility. To do this, click *Administration* from the top menu and then click *Security Center*. For more information, see the *WebFOCUS Security and Administration* manual.

Starting and Stopping the ReportCaster Distribution Server

This section describes how to start and stop the ReportCaster Distribution Server.

Procedure: How to Start the Distribution Server From the OMVS Shell

To start the Distribution Server, use the following procedure:

1. Navigate to the following directory:

/install_directory/ibi/WebFOCUS82/ReportCaster/bin

2. Type the following command and press Enter:

```
./schbkr &
```

When the Distribution Server starts, you receive output similar to the following, depending on which components you installed:

```
Console is listening on port: 8200
Reader ready
Dispatcher ready
Console ready
```

When the Console Ready line appears, the Distribution Server is started.

Note: The Distribution Server will start in Console mode if it cannot connect to the repository, or if your repository is for an earlier release. ReportCaster must use a valid 8.2 Repository.

Procedure: How to Stop the Distribution Server

To stop the Distribution Server, do the following:

1. Navigate to the following directory:

```
/install_directory/ibi/WebFOCUS82/ReportCaster/bin
```

2. Type the following command and press Enter:

```
./stopit
```

3. Wait a few minutes. It may take some time for the Distribution Server to stop. Then, issue the following to confirm the Distribution Server has stopped:

```
netstat -a | grep 8200
```

where:

```
8200
```

Is the port for the Distribution Server.

If you receive a response that says LISTEN:

```
tcp          0      0  *:8200        *:.*          LISTEN
```

Then the Distribution Server has not yet stopped. Wait a few minutes and try again. If it still has not stopped, you can manually kill the process. To do this, sign in as root and issue

```
netstat -nlp | grep 8200
```

Then, kill the process that appears at the end of the line.

Procedure: How to Start the Distribution Server for Production

When running the Distribution Server in production, you should start it using the nohup command. This ensures that the Distribution Server remains running if you close telnet or SSH sessions. To do this:

1. Navigate to the following directory:

```
/install_directory/ibi/WebFOCUS82/ReportCaster/bin
```

2. Type the following command and press Enter:

```
nohup ./schbkr &
```

Output is written to an nohup.out file.

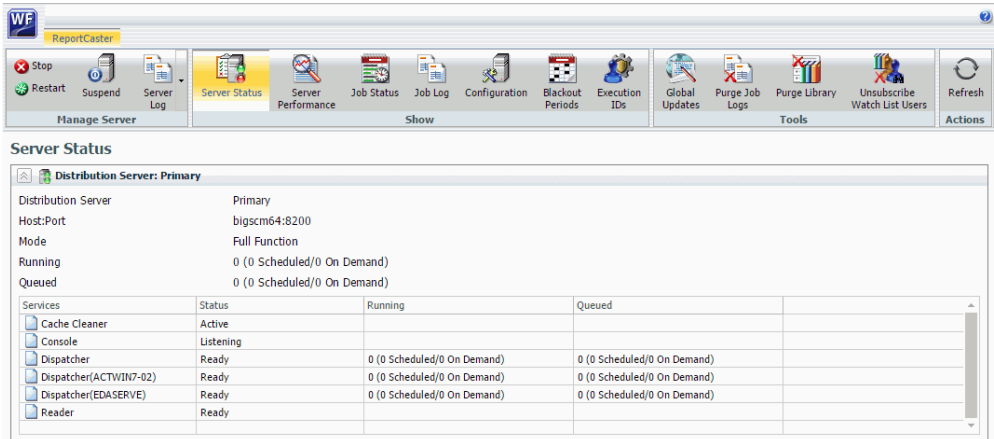
Verifying ReportCaster

After the ReportCaster Distribution Server is started, test the ReportCaster configuration by accessing ReportCaster interfaces.

Procedure: How to Verify ReportCaster Distribution Server Startup

1. Start the ReportCaster Distribution Server and all related components, if they are not started.
2. Sign in to the WebFOCUS Business Intelligence (BI) Portal, then select *ReportCaster Status* from the Tools menu.

The ReportCaster Console opens, as shown in the following image.



3. Verify that the Distribution Server is started on the host and port specified in your configuration.

Importing and Exporting the ReportCaster Configuration File

It is important to note that if you are installing a later version of WebFOCUS, but intend to use an existing repository from any earlier version of WebFOCUS 8.2, you may need to run the following utilities in order to update the `dserver.xml`, `rc_preference.xml`, and `sendmodes.xml` files:

- `exportcfg` and `importcfg`
- `exportrcpref` and `importrcpref`
- `exportsndmode` and `importsndmode`

Note: Each utility will create a `utility_name.log` file in the `...ibi/WebFOCUS82/ReportCaster/log` directory, where `utility_name` is the name of the utility.

dserver.xml

The ReportCaster configuration file (`dserver.xml`) is placed in a WebFOCUS repository table during installation. Changes to this file can be made using the ReportCaster Configuration tool and the WebFOCUS Administration Console. You can export the `dserver.xml` file from the WebFOCUS repository to your file system or import the `dserver.xml` file from your file system to the WebFOCUS repository.

To export the `dserver.xml` file to your file system, run the `exportcfg` utility, which is located in the following directory:

`ibi/WebFOCUS82/ReportCaster/bin`

The `dserver.xml` file will be exported to the following directory:

`ibi/WebFOCUS82/ReportCaster/cfg`

To import the `dserver.xml` file from your file system, copy the `dserver.xml` file to the following directory:

`ibi/WebFOCUS82/ReportCaster/cfg`

Run the `importcfg` utility, which is located in the following directory:

`ibi/WebFOCUS82/ReportCaster/bin`

rc_preference.xml

The ReportCaster user interface control file (`rc_preference.xml`) is placed in a WebFOCUS repository table during installation. You can export the `rc_preference.xml` file from the WebFOCUS repository to your file system or import the `rc_preference.xml` file from your file system to the WebFOCUS repository.

To export the `rc_preference.xml` file to your file system, run the `exportrcpref` utility, which is located in the following directory:

```
ibi/WebFOCUS82/ReportCaster/bin
```

The `rc_preference.xml` file will be exported to the following directory:

```
ibi/WebFOCUS82/ReportCaster/cfg
```

To import the `rc_preference.xml` file from your file system, copy the `rc_preference.xml` file to the following directory:

```
ibi/WebFOCUS82/ReportCaster/cfg
```

Run the `importrcpref` utility, which is located in the following directory:

```
ibi/WebFOCUS82/ReportCaster/bin
```

sendmodes.xml

The file that contains the list of ReportCaster formats and mime types (`sendmodes.xml`) is placed in a WebFOCUS repository table during installation. You can export the `sendmodes.xml` file from the WebFOCUS repository to your file system or import the `sendmodes.xml` file from your file system to the WebFOCUS repository.

To export the `sendmodes.xml` file to your file system, run the `exportsendmode` utility, which is located in the following directory:

```
ibi/WebFOCUS82/ReportCaster/bin
```

The `sendmodes.xml` file will be exported to the following directory:

```
ibi/WebFOCUS82/ReportCaster/cfg
```

To import the `sendmodes.xml` file from your file system, copy the `sendmodes.xml` file to the following directory:

```
ibi/WebFOCUS82/ReportCaster/cfg
```

Run the `importsendmode` utility, which is located in the following directory:

`ibi/WebFOCUS82/ReportCaster/bin`

ReportCaster Configuration

ReportCaster configuration parameters are managed within the ReportCaster Console Configuration tab. For additional ReportCaster configuration information, see the *ReportCaster* manual.

Configuring the Memory Available for the ReportCaster Log Report

The size of the ReportCaster log report is limited by the amount of memory available to the Java VM. When the memory of the Java VM is exceeded, a Java `OutOfMemoryException` error occurs.

To control the size of the log report, you can set the following ReportCaster Server Configuration tool parameters:

- In the Distribution Servers folder, Max Messages per Task from Data Server limits the number of messages written to the log file. The default value is 1000.
- In the Log Settings folder, Log Purge Period designates the number of days in which the logs will be purged. The default value is every 30 days.

Configuring the Heap Size for the ReportCaster Distribution Server

If the ReportCaster Distribution Server experiences a Java out of memory error, you must increase the amount of memory (heap size) available to Java on the Distribution Server. This is done by passing parameters on the Java command line, as follows:

```
java -Xms<initial heap size> -Xmx<maximum heap size>
```

For example,

```
java -Xms1024m -Xmx2048m
```

You must restart the Distribution Server to enable this change.

Configuring ReportCaster Failover and Workload Distribution

The Distribution Server Failover feature allows you to configure a backup Distribution Server that can resume ReportCaster operations when there is an interruption (planned or unplanned) in the primary Distribution Server service. The primary Distribution Server is monitored to verify that it is operational. If there is an interruption in service, the failover Distribution Server is triggered to take over the role of the primary server.

The Workload Distribution feature allows ReportCaster to distribute scheduled jobs across multiple Distribution Servers, providing an efficient and fast way to process large numbers of ReportCaster schedules. Multiple Distribution Servers can be installed on one or more hosts. One instance is designated as the Workload Manager, while the others are designated as Workers. The WebFOCUS Repository will be shared by the Workload Manager and the Workers. Workload Distribution is set up through the ReportCaster Configuration tool. All servers will share one set of configuration information, and the Workload Manager will push any configuration changes to the Workers.

For your application of ReportCaster, you can configure either Failover or Workload Distribution, or both at the same time. The following procedure includes instructions to configure both, but notes when to skip to the appropriate steps if you are only configuring one or the other.

***Procedure:* How to Configure Distribution Server Failover**

To configure distribution server failover:

1. Open the ReportCaster Console and click *Configuration* in the top pane.
2. Click the *Distribution Servers* folder in the left pane.
3. Click the button to the right of the Secondary Distribution Server field.

The Secondary Distribution Server dialog box opens.

4. Select the *Enabled* check box.
5. Enter the host name and port number of the Secondary server.
6. Click *OK*.
7. Click *Save* and then *OK* when you are prompted to save.
8. Install the Distribution Server on the specified host with the specified port number for that host.

***Procedure:* How to Configure Workload Distribution**

To configure workload distribution:

1. Open the ReportCaster Console and click *Configuration* in the top pane.
2. Click the *Distribution Servers* folder in the left pane.
3. Click the button to the right of the Workload Distribution field.

The Workload Distribution dialog box opens.

4. Select the *Enabled* check box.
5. Click *Add*.

6. Double-click the *Worker Name*, *Worker Distribution Server Host*, and *Worker Distribution Server Port* fields to add the new Worker Distribution Server.

Repeat this step for each Worker Distribution Server instance that you want to add.

7. Click *OK*.
8. Click *Save* and then *OK* when you are prompted to save.
9. Install the Distribution Server on each of the specified hosts with the specified port number for that host.

Adding Support for UTF-8 to the Distribution Server

Support for UTF-8 can be added to the Distribution Server by adding `-Dfile.encoding=UTF8` to the Distribution Server Java command. If the Distribution Server is being run from the command line, modify the `schbkr` script file and add `-Dfile.encoding=UTF8` to the Java command.

Important Configuration Considerations When the Distribution Server is Installed Separately From the WebFOCUS Client

When the ReportCaster Distribution Server is installed as a stand-alone server, on a machine that is separate from the WebFOCUS Client, you must perform additional manual steps to ensure that configuration changes made through the WebFOCUS Administration Console are available to ReportCaster. This is because the stand-alone Distribution Server does not have access to the WebFOCUS configuration files being updated by the console. This is especially important when configuring external security for WebFOCUS, since your ReportCaster jobs may not run properly if the Distribution Server is not using the same security settings as the WebFOCUS Client.

The recommended procedure is to make changes to WebFOCUS, as per the documentation, and then test them with a web browser. When the settings are verified, perform the following steps to ensure that the configuration is available to ReportCaster:

1. Copy the `webfocus.cfg` file and the `install.cfg` file from the `/ibi/WebFOCUS82/config` directory to the `/ibi/WebFOCUS82/config` directory on the stand-alone Distribution Server machine.
2. Copy the `odin.cfg` file from the `/ibi/WebFOCUS82/client/wfc/etc` directory to the `/ibi/WebFOCUS82/client/wfc/etc` directory on the stand-alone Distribution Server machine.
3. Copy the `cgivars1.wfs` file from the `/ibi/WebFOCUS82/client/wfc/etc` directory to the `/ibi/WebFOCUS82/client/wfc/etc` directory on the stand-alone Distribution Server machine.
4. Restart the Distribution Server and test the scheduled job behavior.

Configuring Secure Communications to the ReportCaster Distribution Server

ReportCaster encryption can be enabled to secure communications between the ReportCaster application and the ReportCaster Distribution Server. For more information, see *Distribution Server Settings* in the *ReportCaster* manual.

Configuring ReportCaster Web Services in an SSL Environment

By default, the Axis Servlet only accepts HTTP requests. If you use ReportCaster Web Services in an SSL environment, you will need to manually configure the Axis Servlet to accept HTTPS requests. To do so, add a second AxisServletListener with the name https to axis2.xml and specify the port parameter for both listeners. The axis2.xml file is located in the ibi/WebFOCUS82/webapps/webfocus/WEB-INF/conf folder.

The following code is an example of a second AxisServletListener.

```
<transportReceiver name="https"
class="org.apache_1_6_2.axis2.transport.http.AxisServletListener">
<parameter name="port">8443</parameter>
</transportReceiver>
```

For more information, see

<http://axis.apache.org/axis2/java/core/docs/servlet-transport.html>

Configuring ReportCaster for Graphs

In order for ReportCaster to distribute graphs, you must either set DISPLAY or use the headless option. This is similar to the Server Side Graphics configuration discussed in [Verifying and Troubleshooting Server Side Graphics \(PCHOLD\)](#) on page 127.

Procedure: How to Configure ReportCaster for Graphs

The procedure for distributing graphs will depend on whether you have an X Windows Server.

To distribute graphs, do one of the following:

- ❑ If you have an X Windows Server, you can set the DISPLAY variable to the X Server host name. Ensure that the X Server accepts the connection. You can set this by editing the following file:

```
/install_directory/ibi/WebFOCUS82/ReportCaster/bin/schbkr
```

Add a line to export the DISPLAY variable. For example:

```
#!/bin/ksh
export DISPLAY=localhost:0
CLASSPATH=/usr/local/drivers/ojdbc15.jar:
/home/wf82/ibi/WebFOCUS82/ReportCaster/lib/SCHScheduler.jar
export CLASSPATH
java ibi.broker.SCHScheduler /home/wf82/ibi/WebFOCUS82/ReportCaster
```

- ❑ If you do not have an X server, you can set the headless Java option when the Distribution Server starts. However, this does not support GIF graphs or the older GRAPH32 engine. To set this, edit the following file:

```
/install_directory/ibi/WebFOCUS82/ReportCaster/bin/schbkr
```

This is current file.

```
#!/bin/ksh
. /users/mktrgm/ibi/WebFOCUS82/ReportCaster/bin/classpath
"/users/mktrgm/installsoft/JavaJDKLinuxx64/jdk1.8.0_242/bin/java"
-Dreportcaster.home=$DSINSTALL -Dcaster.service=false
-DDSINSTALL_PROD=$DSINSTALL_PROD ibi.broker.SCHScheduler $DSINSTALL
$CMD_LINE_ARGS
```

Place the headless option after the java command as shown in the following example.

```
#!/bin/ksh
. /users/mktrgm/ibi/WebFOCUS82/ReportCaster/bin/classpath
"/users/mktrgm/installsoft/JavaJDKLinuxx64/jdk1.8.0_242/bin/java"
-Djava.awt.headless=true -Dreportcaster.home=$DSINSTALL
-Dcaster.service=false -DDSINSTALL_PROD=$DSINSTALL_PROD
ibi.broker.SCHScheduler $DSINSTALL $CMD_LINE_ARGS
```


Business Intelligence Portal and Home Page Verification and Security

This chapter explains how to verify and secure WebFOCUS Business Intelligence Portal.

If you do not use WebFOCUS Business Intelligence Portal, proceed to [Troubleshooting WebFOCUS and ReportCaster](#) on page 149.

In this chapter:

- ❑ [Verifying and Configuring WebFOCUS Business Intelligence Portal](#)
-

Verifying and Configuring WebFOCUS Business Intelligence Portal

WebFOCUS Business Intelligence Portal provides user interfaces that allow administrators, developers, and end users to access WebFOCUS through a web browser.

BI Portal enables you to build complete, modern websites with multi-levels of navigation. You can have as many levels as you like.

Content is dynamic and end users experience the click-and-drag behavior that they are familiar with in popular online portals. This is a key feature, as end users do not need to learn anything new.

While at work, people should have the same satisfying experiences that they have every day when reading news, reading email, and performing other activities. With BI Portal, the result is zero product training and a high usage rate.

With this product, a portal is easy to build. BI Portal uses the same familiar ribbon interface as the WebFOCUS InfoAssist report development tool. Building a portal is just a matter of a few clicks and click-and-drag actions. With BI Portal, anyone who can build a report using WebFOCUS InfoAssist can develop an impressive portal without any knowledge of web design. For more information on BI Portal, see the *Business Intelligence Portal* manual. For questions regarding licensing, contact your Information Builders branch representative.

If you installed the BI Portal with the WebFOCUS Client, you should verify that the interfaces are accessible, as explained below.

Caution: If you installed a pop-up blocker for your browser, you must disable it when accessing the BI Portal.

WebFOCUS Home Page Verification

It is recommended to access the WebFOCUS Home Page to confirm the installation and set the administrator password.

Procedure: How to Access the WebFOCUS Home Page

1. Confirm that the following are started:

- WebFOCUS Reporting Server
- Web Servers and Application Servers
- ReportCaster Distribution Server (when the WebFOCUS Client license includes ReportCaster)

2. Go to the following URL:

http://hostname:port/ibi_apps

where:

hostname:port

Are the host name and port of the web server. However, if you use an application server only configuration, then these are the host name and HTTP port of the application server. If you require SSL, use https instead of http.

The WebFOCUS Sign In page opens.

3. Sign in as an administrator. The default user name and password are *admin* and *admin*, respectively.

By default, BI Portal accounts are created and administered from within the Security Center interface and are not related to the accounts used for the WebFOCUS Reporting Server. This default sign-in behavior can be customized using the procedures and steps detailed in the *WebFOCUS Security and Administration* manual.

The WebFOCUS Home Page opens in your web browser.

Note: If the WebFOCUS Home Page does not appear, verify that your web server is running and that the proper aliases have been defined.

4. Set a new password and email address for the admin account as follows. If you use both Report Library and Managed Reporting, this is required.
 - a. Select *Security Center* from the Administration menu.
The Security Center opens.
 - b. Right-click a user name and select *Edit* from the context menu.

The Edit User dialog box opens, as shown in the following image.

- c. Enter an email address to use for the administrator in the EMail Address field.
- d. Click *Set Password*.

The Set Password dialog box opens.

- e. Set and confirm the password. If you use ReportCaster, this should match the password you set for the ReportCaster Administrator in [Verifying ReportCaster](#) on page 136.
 - f. Click *OK*.
You are returned to the Edit User dialog box.
 - g. Click *OK*.
You are returned to the Security Center dialog box.
 - h. Click *Close*.
5. Return to the WebFOCUS Home Page and optionally create a report using InfoAssist.
If you receive errors while using InfoAssist, your application server may not be properly compiling JSP files.

For details on resolving errors in compiling JSP files, refer to [How to Verify the WebSphere Application Server is Configured to Run Java 1.8](#) on page 96.

Troubleshooting WebFOCUS and ReportCaster

This chapter contains information for tracking errors and debugging problems.

Since much of WebFOCUS Client processing is done through your web and application servers, their configuration is a common cause of problems. If you run into any problems, carefully review the configuration information in [Configuring Web and Application Servers](#) on page 87.

If you encounter any problems with ReportCaster, read the entire [ReportCaster Troubleshooting Tips](#) on page 155 section to determine if your system is configured properly.

For additional assistance, call Information Builders Customer Support Services at (800) 736-6130 or (212) 736-6130, or call your local Information Builders representative.

In this chapter:

- [WebFOCUS Troubleshooting Tips](#)
 - [ReportCaster Troubleshooting Tips](#)
-

WebFOCUS Troubleshooting Tips

Troubleshooting WebFOCUS requires considering all the places where a problem can occur. These include the following:

- Web Browser and its Java Plug-In
- Web Server
- Application Server and its Java VM
- WebFOCUS Client Configuration Files
- X Windows Server when creating graphics by setting DISPLAY
- WebFOCUS Reporting Server
- ReportCaster Context Root

General Tips

Try some of these solutions when troubleshooting WebFOCUS problems:

1. Clear your web browser cache and close all browser instances. Often, even after you have taken steps to correct a problem, the page or pages that contained the original problem still reside in cache.
2. Ensure all components are started and listening on their expected ports. The WebFOCUS web application may take some time to load.
3. Ensure you typed the correct URL. WebFOCUS URLs are case-sensitive.
4. If your web server is not listening on port 80, make sure you are calling with the correct port in the URL.
5. Ensure that the correct application names are listed in your WebFOCUS Reporting Server APP PATH. This is defined in:

```
/install_directory/ibi/srv82/wfs/etc/edasprof.prf
```

This may be the problem if you receive a *Resource not found* message.

6. Turn on tracing through the WebFOCUS Administration Console.
7. Clear the cache in your application server after completing the upgrade installation. For example, if you are using Apache Tomcat, the cache can be cleared by manually deleting any subdirectories that correspond to the context roots that you deployed (for example, /ibi_apps, /ibi_html, and /ibi_help), which are located in the following directory:

```
/tomcat_home/work/Catalina/localhost
```
8. In the WebFOCUS Administration Console, click *Diagnostics* on the left and use the available options to troubleshoot.
9. Restart all components, especially your web and/or application servers.

Web Browser Issues

If you are planning to use WebFOCUS products, note that browsers released after the production date of a WebFOCUS version are subject to certification. Certification is done with the current release level of WebFOCUS and App Studio. For additional information, see *the WebFOCUS Release Guide*, which can be accessed by clicking on the following URL:

https://techsupport.informationbuilders.com/tech/wbf/8206_relguide.pdf

Note: Some browsers may function differently depending on the operating system. See the *WebFOCUS Release Notes* for detailed information on known issues related to browser version or configuration.

JVM Support Issue with IBM WebSphere Application Server

In Release 8206, Java VM Version 8 is supported on the system that is hosting the application server where the WebFOCUS Client web application is displayed and the ReportCaster Distribution Server is installed.

Procedure: How to Verify JVM Version

There are two methods for verifying the Java VM version installed on the machine where the WebFOCUS client is deployed.

❑ From the WebFOCUS Administration Console:

1. Sign in to WebFOCUS and select *Administration Console* from the Administration menu.
2. Select the *Diagnostics* tab.
3. Select *JVM Property Info*.

The version is listed under `java.runtime.version`.

❑ From a browser, type the following URL:

http://hostname:port/ibi_apps/diagnostics/properties.jsp

The version is listed under `java.vm.version`.

Web and Application Server Debugging

Ensure your web and application servers are configured as explained in [Configuring Web and Application Servers](#) on page 87.

Since WebFOCUS relies on processing by the Java VM, web server, and application server (or servlet container), their debugging tools and log files can help troubleshoot common WebFOCUS issues. Review the documentation for your web and application servers for information on their tracing and log files.

Java Memory Issues

Setting some Java VM options can improve performance and correct problems with the application server. The most common settings involve the size of the Java heap and stack, which determine memory availability for Java programs and the Java VM. Errors can occur if not enough memory is available, and the heap size impacts performance, since it determines how often garbage collection occurs.

If you run into performance problems or receive out of memory exceptions, you can adjust these sizes. The following are the most common Java VM options related to memory settings. Replace the ### with the size you wish to set:

-Xss####M

Sets the Java thread stack size.

-Xmx####M

Sets the maximum Java heap size.

-Xms####M

Sets the initial Java heap size. This should be at least 1024 MB (1 GB).

The size is normally set in Megabytes, for example:

-Xms1024M

-Xmx2048M

To view your current Java VM memory settings, access the WebFOCUS Administration Console. In the left pane of the console, select the *Diagnostics* tab and then select *JVM Property Info*.

The Java VM memory settings for your environment are displayed in the right pane, as shown in the following image.

[Memory Information \(K\)](#)

Type	Pool Name	Current Used	Peak Used	Initial	Committed	Maximum	Threshold Count
Heap	*	427,524	~	524,288	779,776	932,352	~
	PS Eden Space	241,433	290,816	131,584	254,976	283,136	n/a
	PS Survivor Space	16,209	44,534	21,504	33,792	33,792	n/a
	PS Old Gen	169,881	169,881	349,696	491,008	699,392	0
Non-Heap	*	171,193	~	2,496	175,680	0	~
	Code Cache	55,040	55,390	2,496	55,872	245,760	0
	Metaspace	104,448	104,448	0	107,520	0	0
	Compressed Class Space	11,704	11,704	0	12,288	1,048,576	0

Note: To set Initial Heap and Maximum Heap size, use the following JVM startup parameters:

- Xms256m will set the Initial Heap size to 256Mb
- Xmx256m will set the maximum Heap size to 256Mb
- XX:MaxPermSize=128m will set the maximum Perm Gen Size to 128Mb

Note: For Development environments, you can set Xms to a value less than Xmx, so memory is acquired dynamically. In a production environment, it is recommended that Xms be equivalent to Xmx, and that this value is 1/4 of available memory. If deploying multiple versions of WebFOCUS within the same JVM, MaxPermSize should be 128m, per deployed WebFOCUS application.

System Properties:

awt.toolkit	sun.awt.X11.XToolkit
catalina.base	/bigscm/592/lb/tomcat
catalina.home	/bigscm/592/lb/tomcat
catalina.useNaming	true
common.loader	"\${catalina.base}/lib","\${catalina.base}/lib/*.jar","\${catalina.home}/lib","\${catalina.home}/lib/*.jar"
file.encoding	ISO-8859-1

Optimum sizes vary depending on your total memory, the needs of your application, how many other processes require memory, the type of Java VM, and other considerations. A good starting place is to set the minimum to 1/8 of the total RAM and set the maximum to 1/4 of total RAM.

Where to set these and other Java VM options, depend on your application server.

Character Set Issues

WebFOCUS and ReportCaster expect an ISO8859-1 based character set. However, some systems may default to using Unicode (ISO 10646/UTF-8) instead. If this is the case, some characters, such as subscripts, may appear as a question mark (?) or other unexpected symbols in your reports. To correct this, set the LANG environment variable to specify the correct ISO8859-1 character set for your language. On Solaris systems, also set the LC_ALL environment variable to specify the correct ISO8859-1 character set. For example, English on Solaris is:

```
export LANG=en_US.ISO8859-1
export LC_ALL=en_US.ISO8859-1
```

Set the LANG and LC_ALL variables so they are available to the Java VM running your application server and Distribution Server. Where to set this varies depending on your application server, but you can normally export and set the variables in the application server startup script. For the Distribution Server, you can export and set this in schbkr script.

Using the jar Utility

A jar utility is installed with the Java JDK. It lets you create, extract, and edit the contents of JAR, WAR, EAR, ZIP, RAR, and other archive files. If you deploy the WebFOCUS web application as a WAR file, the jar utility lets you change the webfocus.war file contents.

Procedure: How to Edit the WebFOCUS Web Application

The WebFOCUS web application is provided as both an expanded directory and a WAR file:

```
/install_directory/ibi/WebFOCUS82/webapps/webfocus.war
```

```
/install_directory/ibi/WebFOCUS82/webapps/webfocus
```

The easiest way to edit the web application is the following:

1. Undeploy the webfocus.war file from your application server.
2. Rename the webfocus.war file to webfocus-old.war. This ensures you have a back up and can keep track of where the latest version resides.

3. Edit or add files to the expanded webfocus directory and subdirectories. You should do this even if you deploy the WAR file instead of the expanded directories. This ensures that service packs maintain your changes. When you apply a service pack, any changes must be in the expanded directories to be maintained.

4. Navigate to the webfocus directory. For example:

```
/install_directory/ibi/WebFOCUS82/webapps/webfocus
```

5. Use the jar command to create a new webfocus.war file that contains the contents of the webfocus directory and sub-directories. For example:

```
jar cvf ../webfocus.war *
```

This creates a webfocus.war file containing all files and subdirectories in your current directory. The webfocus.war file will be located one directory above your current location because you prefaced it with "../".

6. Redeploy the WebFOCUS web application to your application server.

You can edit the ReportCaster web application in the same fashion.

Procedure: How to Execute the jar Utility

The options for using the jar commands are useful to know.

- To create a new jar file:

```
jar cvf FileToCreate.war FileToAdd1 FileToAdd2
```

You can add all files and subdirectories using an *:

```
jar cvf FileToCreate.war *
```

- To extract the contents of an existing jar file:

```
jar xvf ExistingFile.war FileToExtract1 FileToExtract2
```

Files are extracted to your current location.

You can extract all files and subdirectories by not specifying any files to extract:

```
jar xvf ExistingFile.war
```

- To add or replace a file in an existing jar file:

```
jar uvf ExistingFile.war FileToAdd1
```

Silent Installation Path Issues

A path issue can generate an error during the silent installation of a distribution server.

When running the silent parameter file, you may see the following messages:

```
./install[924]: var_asgn_file: not found.
```

To solve this problem, you must add . (dot) to your UNIX PATH statement.

This is an example of the syntax:

```
export PATH=.:$PATH
```

Verifying the setting should show new path as:

```
.: /usr/java8/jre/bin:/usr/bin
```

You should then be able to run the silent installation.

ReportCaster Troubleshooting Tips

ReportCaster relies on communications between the following components:

- Web browser (for user interfaces)
- ReportCaster Web components
- ReportCaster Distribution Server
- Database server
- WebFOCUS Reporting Server
- Mail server
- FTP server (for FTP distribution)

If ReportCaster fails to perform properly, confirm that all components are installed, started, and listening on their expected ports. All components can run on one machine or components can be distributed across different machines running different operating systems. If components are distributed, ensure all machines are running and can communicate using the expected protocols.

The ReportCaster Distribution Server starts in Console mode if it cannot connect to the repository. The ReportCaster Distribution Server will also start in Console mode if it can connect to the repository but the tables are not created. The Scheduler log file indicates why the Distribution Server started in Console mode. If you need to change repository parameters, refer to [ReportCaster Configuration](#) on page 139.

Note: The ReportCaster web components, WebFOCUS Reporting Server, and ReportCaster Distribution Server must all be the same release number.

Distribution Server Traces

Normally, you should turn the Distribution Server traces on and off using the ReportCaster Server Configuration interface. However, if the interface is not available, you can execute the following utility:

```
/install_directory/ibi/WebFOCUS82/ReportCaster/bin/traces
```

The trace files appear in */install_directory/ibi/WebFOCUS82/ReportCaster/trc*. In addition, check the log files in */install_directory/ibi/WebFOCUS82/ReportCaster/log* for more information.

Remember to turn traces off after solving problems.

Troubleshooting Web Browser Errors

To use the ReportCaster Development and Administration interface, end users must have Java Version 8 or Java Version 11 installed on their machines. The web browser of the user must be configured to use this Java VM to process applets.

Be aware that when end users schedule reports, the default time they see is in part determined by the system time and Java VM on the end user machines. If this is incorrect, try updating the end-user Java VM plug-ins to Java 1.8.0_242. Earlier Java releases might not adjust for the recent changes in U.S. daylight savings time.

Troubleshooting ReportCaster Servlet Errors

Review the installation and configuration instructions in [Installing the WebFOCUS Client](#) on page 47 and [Configuring Web and Application Servers](#) on page 87.

- Ensure your web and application servers are running.
- Ensure the WebFOCUS web application is installed and configured. The ReportCaster components are part of the WebFOCUS web application installed with the WebFOCUS Client.

```
/install_directory/ibi/WebFOCUS82/webapps/webfocus
```

Troubleshooting ReportCaster Distribution Server Errors

Review the installation and configuration instructions in [Installing the WebFOCUS Client](#) on page 47, [WebFOCUS Repository Post-Installation Tasks](#) on page 129 and [WebFOCUS ReportCaster Post-Installation Tasks](#) on page 133.

- Ensure the ReportCaster Distribution Server is running.

- ❑ Ensure the WebFOCUS web application knows where the Distribution Server is. The AGENT_NODE and AGENT_PORT parameters specify the host name and TCP Port for the Distribution Server in files installed with WebFOCUS Client:

```
/install_directory/ibi/WebFOCUS82/client/wfc/etc/cgivars.wfs
```

```
/install_directory/ibi/WebFOCUS82/webapps/webfocus/WEB-INF/web.xml
```

If the parameters are incorrect in these files, correct them. If you deployed the expanded webfocus directory, redeploy the directory. If you deployed the webfocus.war file, use the jar command to place this web.xml file into the WEB-INF directory inside the webfocus.war file, and then redeploy the webfocus.war file. See *Using the jar Utility* on page 153 for more information.

- ❑ Ensure that a supported version of Java is properly installed and configured.
- ❑ Check the settings in the following file:

```
/install_directory/ibi/WebFOCUS82/ReportCaster/install.cfg
```

This file records the information provided when you installed the Distribution Server. To change this information, use the ReportCaster Server Configuration interface or the scripts described in *ReportCaster Configuration* on page 139.

Troubleshooting Repository Errors

Review the installation and configuration instructions in *Installing the WebFOCUS Client* on page 47 and *WebFOCUS ReportCaster Post-Installation Tasks* on page 133.

- ❑ Ensure the database server is running.
- ❑ Ensure the database and tables exist.
- ❑ Ensure that the Distribution Server machine contains the correct information to connect to the database. You can set this information using the ReportCaster Server Configuration interface.
- ❑ Ensure the JDBC driver is installed on the WebFOCUS Client and ReportCaster Distribution Server machines.
- ❑ Ensure your application server has the correct CLASSPATH to the JDBC driver. You can also add the driver files to the WEB-INF/lib directory for the ReportCaster web application. To do this, copy the files into:

```
/install_directory/ibi/WebFOCUS82/webapps/webfocus/WEB-INF/lib
```

If you deployed the expanded directory, redeploy it. If you deployed the webfocus.war file, use the jar command to insert the driver files or create a new web application as explained in *Using the jar Utility* on page 153. Then redeploy the WAR file.

- ❑ Ensure the Distribution Server has the correct CLASSPATH to the JDBC driver in:

`/install_directory/ibi/WebFOCUS82/ReportCaster/bin/classpath`

Troubleshooting ReportCaster Context Root

Applications containing a hardcoded reference to rcaster or a ReportCaster specific context root will encounter an error. There is a new war file for customers that will redirect to the new ibi_apps without having to change their code.

Redirecting Web Applications With the ReportCaster Context Root

In WebFOCUS 8.2, the WebFOCUS and ReportCaster web applications have been combined into one web application. In prior releases, the two applications were deployed separately with unique context roots whose default values were ibi_apps and rcaster. In WebFOCUS 8.2, there is only one context root for WebFOCUS and ReportCaster with a default value of ibi_apps.

However, customers who have web applications that contain hardcoded references to rcaster in the URL or a ReportCaster specific context root will be affected. To resolve this, deploy the redirect.war file to redirect URLs that reference rcaster or a ReportCaster specific context root to the single context root.

Troubleshooting Reporting or Delivery Errors

Review the WebFOCUS and ReportCaster documentation and the documentation for your Mail or FTP server.

- ❑ Ensure the WebFOCUS Reporting Server is running.
- ❑ Ensure the report, file, or URL is valid.
- ❑ Ensure the Mail or FTP server is running.
- ❑ Check the settings in the ReportCaster Server Configuration interface.

Solr Installation and Configuration

Solr is an open-source, high-performance, full-featured enterprise-search platform. Solr uses the Apache Lucene™ Java search library as its core for searching and indexing.

The following Information Builders features make use of the Solr platform:

- InfoSearch
- WebFOCUS Home Page
- Home Widget
- Navigation Widget

In this chapter:

- [Indexing Existing Content](#)
-

Indexing Existing Content

You can index existing content in a WebFOCUS repository, such as Titles, Tags, and Summaries.

Procedure: **How to Index Existing Content**

1. Sign in to your WebFOCUS instance.
2. Open a new browser tab for the web services page, for example:

http://localhost:8080/ibi_apps/rs?IBIRS_action=TEST

3. Click the *utils* button, and in the `indexRepository/IBIRS_path` field, type `/WFC/Repository`, as shown in the following image.

ibfs templates impex **utils** describe defer indexadmin

WebFOCUS utils Web Services

HELP [compactPolicy](#) [describeRepository](#) [expandPolicy](#) [indexRepository](#)

compactPolicy (GET)
IBIRS_action **IBIRS_policy**

compactPolicy

describeRepository (POST)
IBIRS_path **IBIRS_action** **IBIWF_SES_AUTH_TOKEN**

describeRepository 85a3014cf62df9e676955b0631e9

expandPolicy (GET)
IBIRS_action **IBIRS_base64Policy**

expandPolicy

indexRepository (POST)
IBIRS_path **IBIRS_action** **IBIWF_SES_AUTH_TOKEN**

/WFC/Repository x indexRepository 85a3014cf62df9e676955b0631e9

- Click `indexRepository` to complete the process.

A new window session opens with the execution results, as shown in the following code.

```
<?xml version="1.0" encoding="UTF-8"?>
<ibfsrpc language="en_US" type="simple" subreturncode="0"
returndesc="SUCCESS" returncode="10000"
name="indexRepository" _jt="IBFSResponseObject">
  <ibfsparams size="1">
    <entry value="/WFC/Repository" key="IBIRS_path"/>
  </ibfsparams>
  <rootObject _jt="string" value="Indexer Count of paths indexed:520"/>
</ibfsrpc>
```

- Click the `utils` button, and in the `describeRepository/IBIRS_path` field, type `/WFC/Repository`, as shown in the following image.

The screenshot shows the 'WebFOCUS utils Web Services' interface. At the top, there are navigation buttons: 'ibfs', 'templates', 'impex', 'utils' (highlighted), 'describe', 'defer', and 'indexadmin'. Below the buttons, there is a 'HELP' button and several links: 'compactPolicy', 'describeRepository', 'expandPolicy', and 'indexRepository'. The 'compactPolicy' section is expanded, showing a form with a 'compactPolicy' button and a large empty text area. Below that, the 'describeRepository' section is expanded, showing a form with three fields: 'IBIRS_path' (containing '/WFC/Repository'), 'IBIRS_action' (containing 'describeRepository'), and 'IBIWF_SES_AUTH_TOKEN' (containing '85a3014cf62df9e676955b0631e9'). Below that, the 'expandPolicy' section is expanded, showing a form with an 'expandPolicy' button and an empty text area. Finally, the 'indexRepository' section is expanded, showing a form with three fields: 'IBIRS_path' (empty), 'IBIRS_action' (containing 'indexRepository'), and 'IBIWF_SES_AUTH_TOKEN' (containing '85a3014cf62df9e676955b0631e9').

6. Click *describeRepository* to complete the process.

A new window session opens with execution results, as shown in the following code.

```
<?xml version="1.0" encoding="UTF-8"?>
<ibfsrpc _jt="IBFSresponseObject" language="en_US"
name="describeRepository"
returncode="10000" returndesc="SUCCESS" subreturncode="0" type="simple">
  <ibfsparams size="1">
    <entry key="IBIRS_path" value="/WFC/Repository"/>
  </ibfsparams>
<rootObject _jt="string" value="Processed count: 345. Described count:
310.
Have parameters count: 86. Non writable files skipped: 0"/>
</ibfsrpc>
```

7. From the WebFOCUS Administration Console menu bar, click *Clear Cache* and, when you receive a confirmation message, click *OK*.
8. Sign out of WebFOCUS and then sign back in to WebFOCUS.
9. Depending on the widget you want to use, navigate to *webfocus_instance/ibi_apps/home_widget* or *webfocus_instance/ibi_apps/navigation_widget*.

Magnify Configuration

This section describes how to configure Magnify.

In this appendix:

- [Installing Magnify on UNIX and z/OS](#)
 - [Prerequisites](#)
 - [Optimizing the Magnify Environment](#)
 - [Security](#)
-

Installing Magnify on UNIX and z/OS

The UNIX and z/OS installation is text-based, meaning you are prompted for various information on a text line as you move through the installation.

During the installation, after typing the WebFOCUS license code, you are prompted for the Magnify license code. Enter the license code and continue with the WebFOCUS installation as usual.

Once Magnify is installed, you are ready to perform the configuration tasks.

Prerequisites

Magnify requires an application server (for example, Tomcat or WebSphere) in order to read and write to index libraries. It can be installed on a Windows (64-bit preferred) or UNIX/Linux-based server, using the same language as the WebFOCUS Client.

Processing should be at least a dual-core machine. However, four CPUs are generally recommended. Moreover, a minimum of 8GB in memory is required, while 16GB is usually recommended. Depending on the size of the data, storage space should be anywhere between 250GB to 1TB or higher (it is usually estimated as three times the size of the expected data set).

Note: This all varies depending on the type of search-based application being proposed. Indexing frequency, volume of data, and concurrent usage affect how storage space and memory are allocated. Therefore, the use of a split-tier environment is recommended for a Magnify platform where the Reporting Server, Magnify, and each data source are each provided with their own dedicated resources. Magnify does scale in order to accommodate any environment.

The following are the prerequisites to configuring and using Magnify:

- WebFOCUS 8.2 Client (with a Magnify license)
- Application Server (for example, Tomcat or WebSphere)

Note: For more information, see the *WebFOCUS Security and Administration* manual.

- Java Development Kit (JDK) Version 8 or Version 11

Optimizing the Magnify Environment

When indexing large documents, we recommend that you change the application server limits for files that it accepts through an HTTP POST operation.

For example, in the Tomcat application server, the `maxPostSize` parameter can be updated in `/path/tomcat/conf/server.xml` to remove the limit, as follows:

```
<Connector port="8080"  
protocol="HTTP/1.1"connectionTimeout="20000"  
redirectPort="8443" maxPostSize="-1"
```

The default value for `maxPostSize` is 2097152 (2 megabytes). If this limit is exceeded, the following error is written in the Tomcat log:

```
java.lang.IllegalStateException: Post too large  
at org.apache.catalina.connector.Request.parseParameters(Request.java:2368)  
at org.apache.catalina.connector.Request.getParameter(Request.java:1005)
```

Security

Magnify integrates with most enterprise security frameworks to control accessibility to sensitive information. Security can be configured in many ways to address varied security strategies. Security plug-ins extend the ability of Magnify to authenticate users and authorize the data to which they can have access.

Magnify security is maintained through the WebFOCUS Client Security architecture. Accessing a secure report requires login credentials. When Magnify uses Lucene, security rules added to the indexed data trigger an external security program (security exit) that determines user authentication and data authorization.

Additional Graph Configuration Options

This appendix explains how to configure WebFOCUS graph options. For ReportCaster to distribute graphics in a PDF, you must review the HOLD options.

In this appendix:

- [Graph Options](#)
 - [Graph Invocation and Generation Options](#)
 - [PCHOLD \(Server Side\) Graphics Overview](#)
 - [Configurations for HOLD Graphics](#)
-

Graph Options

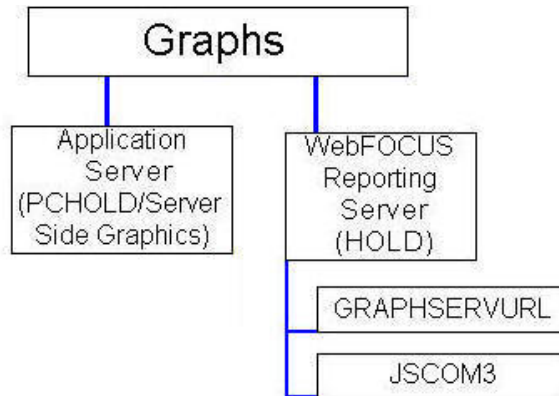
Server-side WebFOCUS graphs are generated by a Java-based graph engine installed with WebFOCUS components. GRAPH53 is the server-side WebFOCUS graph engine. It contains support for many different graph types and advanced 3D graph options. HTML5 graphs are also available. HTML5 graphs are created as Java code that runs directly in the browser,

Graph Invocation and Generation Options

There are several ways to create WebFOCUS graphs.

- Using FORMAT JSCHART to generate HTML5 graphs. HTML5 graphs are delivered to the browser as java code and run in the browser.
- On the web or application server (Server Side Graphics/PCHOLD), as explained in [PCHOLD \(Server Side\) Graphics Overview](#) on page 168.

- ❑ On the WebFOCUS Reporting Server (HOLD), as explained in [HOLD Graphs Overview](#) on page 169.



PCHOLD (Server Side) Graphics Overview

With Server Side Graphics, a servlet generates graphs on the web or application server and delivers them to the browser as bitmap images (such as .png, .gif, or .jpg) or in a vector format embedded in a PDF document.

In order for the application server to generate the graphs, you must configure the application server environment. You can set the DISPLAY environment variable to an X Windows Server or you can use set the Java VM headless option.

For information on DISPLAY versus headless and their configuration steps, see [Configuring Web and Application Servers](#) on page 87 and [Verifying and Troubleshooting Server Side Graphics \(PCHOLD\)](#) on page 127.

HOLD Graphs Overview

With HOLD graphs, the WebFOCUS Reporting Server uses the graph engine to create the graphs either locally or through an HTTP call to the application server. Graphs are then stored on the WebFOCUS Reporting Server. This is required when ReportCaster must distribute graphs in a PDF, but you may find other reasons to use it. The following options are available for HOLD graphs.

❑ **GRAPHSERVURL**

The WebFOCUS Reporting Server makes an HTTP call to the application server in order to generate the graphs. When the graph is created, it is stored in a directory on the WebFOCUS Reporting Server machine.

GRAPHSERVURL is enabled by default and normally requires no configuration.

❑ **JSCOM3** (thread-based)

The WebFOCUS Reporting Server uses its JSCOM3 service to generate graphs. JSCOM3 is a listener installed with the WebFOCUS Reporting Server and it handles the Java code needed to generate server-side graphs. Procedures run as threads of the JSCOM3 process.

JSCOM3 is used if GRAPHSERVURL is not set in `cgivars.wfs` or a procedure. It can also be used if GRAPHSERVURL is overridden in a procedure. It is not used if you set an `IBIJAVAPATH` environment variable.

Configurations for HOLD Graphics

When using PCHOLD, a procedure is invoked on the WebFOCUS Reporting Server and the server accesses data sources to determine values. These values are usually passed back to the WebFOCUS Client on the web or application server and the client uses the graph engine to create graphics.

When using HOLD, after a procedure is invoked and the values determined, the WebFOCUS Reporting Server uses the graph engine to create the graphics itself or makes an HTTP call to the web server.

Using a HOLD can be specified in a procedure, as shown in the following example.

Example: Creating a Sample Procedure for HOLD

To test whether HOLD works in your environment, create a procedure like the following:

```
APP HOLD BASEAPP
GRAPH FILE CAR
SUM SALES
BY COUNTRY
ON GRAPH HOLD AS HOLDTEST FORMAT PNG
END
```

Save this procedure in the `ibisamp` directory on the WebFOCUS Reporting Server machine. For example:

```
/install_directory/ibi/apps/ibisamp/cagrsvr.fex
```

This procedure creates a file called `holdtest.png` in `baseapp`. You can use the procedure to test the HOLD configurations that follow. If `GRAPHSERVURL` is set in `cgivars.wfs`, you can override it and use `JSCOM3` or `IBIJAVAPATH`, by adding the following as the second line of the sample procedure.

```
SET GRAPHSERVURL= " "
```

Configuring GRAPHSERVURL

No special configuration is needed to use `GRAPHSERVURL`, provided you have deployed the WebFOCUS web application to your application server. `GRAPHSERVURL` is set as the `IBIF_graphservurl` value in `cgivars.wfs`. The value in `cgivars.wfs` is passed to the WebFOCUS Reporting Server when you launch a procedure through a servlet call. The value can also be set or overridden in a procedure using:

```
SET GRAPHSERVURL=http://hostname:port/ibi_apps/IBIGraphServlet
```

where:

```
hostname:port
```

Are the host name and port of the web server or application server.

`GRAPHSERVURL` is not supported when used against a secured web server (SSL, Basic Authentication, or other third-party security), because there is no mechanism for supplying credentials.

If you are using a secured web server in front of your application server, you can reset this value to directly call the application server host and port instead of the web server. You can do this in `cgivars.wfs` through the WebFOCUS Administration Console.

For ReportCaster, this must be set in a procedure, since it is not inherited from `cgivars.wfs`. Otherwise, a procedure launched by ReportCaster makes use of `JSCOM3` or `IBIJAVAPATH`.

You can disable `GRAPHSERVURL` and use `JSCOM3` or `IBIJAVAPATH` for a specific procedure by setting `GRAPHSERVURL` to nothing:

```
SET GRAPHSEVURL= " "
```

Configuring for JSCOM3 HOLD

JSCOM3 is a listener installed with the WebFOCUS Reporting Server. It normally uses the fourth port used by the server. By default, this is port 8123. It is only used for HOLD graphics if GRAPHSEVURL and IBIJAVAPATH is not set.

To use JSCOM3, you must set the \$JDK_HOME variable to your Java JDK installation directory. JSCOM3 is configured to automatically use headless. If you wish to use DISPLAY, you need to disable headless for JSCOM3 and set the DISPLAY variable.

For more information, see the *Server Installation* manual.

Be aware that if you create graphs that use templates, JSCOM3 uses a different copy of the templates than the WebFOCUS Client. If you modify templates, be sure to modify both. One is installed with the server for JSCOM3 and one is installed with the WebFOCUS Client:

```
/install_directory/ibi/srv82/home/graph
```

```
/install_directory/ibi/WebFOCUS82/ibi_html/javaassist/images/tdg/template
```


This appendix optionally applies to WebFOCUS Managed Reporting and ReportCaster users. It contains:

- ❑ Reference information about repositories ([Repository JDBC Concepts](#) on page 173 and [Repository Connection Information](#) on page 176).
- ❑ Sizing information for creating tablespaces ([Sizing Guidelines](#) on page 181).
- ❑ MySQL database installation and configuration information ([MySQL Repository Set Up](#) on page 183).

In this appendix:

- ❑ [Repository JDBC Concepts](#)
 - ❑ [Repository Connection Information](#)
 - ❑ [Sizing Guidelines](#)
 - ❑ [MySQL Repository Set Up](#)
-

Repository JDBC Concepts

This section provides a brief overview of repository concepts related to the WebFOCUS Client and ReportCaster.

Repositories should be stored in a certified relational database management system (RDBMS), such as Derby, SQL Server, Oracle, MySQL, or Db2. WebFOCUS and ReportCaster communicates with an RDBMS using Java Database Connectivity (JDBC).

JDBC Overview

JDBC provides a way for Java programs to access databases and other data sources. Using JDBC, WebFOCUS and ReportCaster connects to your repository. It then creates and executes SQL statements to access and write repository information. In theory, JDBC provides a level of abstraction so that most SQL statements work on most databases. However, in practice, differences occur and you should ensure you choose a database and driver that are supported by WebFOCUS.

In order for the WebFOCUS Client to connect to a repository using JDBC, the following are required:

- User ID and Password
- JDBC Driver
- JDBC Path

User ID and Password

The credentials you provide to the database are critical, as they determine how you access the repository. Depending on the type of database, if you wish to maintain separate repositories for separate instances of WebFOCUS Client, you may need separate user IDs.

During the WebFOCUS Client installation, the credentials are set in the WebFOCUS configuration file, `install.cfg`. If you need to change these values, you can edit this file. The WebFOCUS Administration Console allows you to change the password.

JDBC Driver

The JDBC driver is a class name used to access the driver. This varies depending on the driver.

During the Distribution Server installation, this is determined and set.

- For Derby, Oracle, SQL Server, MySQL, and Db2, the installation automatically writes the JDBC driver class name for the standard driver.
- For other databases and drivers, you are prompted to provide the JDBC driver class name. This value is stored in the WebFOCUS configuration file, `install.cfg`. If you need to change this value, you can edit this file.

JDBC Path

A JDBC driver is usually packaged as one or more JAR or ZIP files. Each target data source has its own JDBC driver, so you would use the Oracle JDBC driver to access Oracle and the SQL Server JDBC driver to access SQL Server. Some vendors may also require different drivers for different database releases.

WebFOCUS uses a JDBC type 4 driver to connect to the database.

The JDBC driver must be installed on the machine or machines that run WebFOCUS Client and ReportCaster Distribution Server.

The JDBC driver is used by both the Distribution Server and the application server. For ReportCaster to find the driver, the JDBC driver must be included in their CLASSPATH variables.

- For the Distribution Server, you provide the location of the driver during the Distribution Server installation. The installation uses this information to add the location of the driver to the CLASSPATH variable used by ReportCaster scripts and utilities. This is set in the following file:

```
/install_directory/ibi/WebFOCUS82/ReportCaster/bin/classpath
```

- For the application server, you set your application server CLASSPATH variable to include the driver file or files.

Note: You can also copy driver files into the WEB-INF/lib directory located inside the webfocus.war file or WebFOCUS82 directory before you deploy the web application.

You must always specify the driver file or files, not just the directory containing the driver. You enter the JDBC driver file name in the JDBC Path field.

During the WebFOCUS and Distribution Server installation, this is created and set.

- Depending on the database selected, Oracle, SQL Server, and so on, you are prompted to provide the full path to the JDBC driver.
- For the WebFOCUS installation, the value for the JDBC path is set in the ../utilities/setenv/utiluservars.sh file and is used when running WebFOCUS utilities, such as create database tables, update a database, and so on. If you need to change the value, you can edit this file.

JDBC Class

The JDBC class is a value used to access the JDBC driver. The JDBC class value varies depending on the driver.

During the WebFOCUS Client installation, the JDBC class value is determined and set based on the database selection.

- For Oracle, SQL Server, MySQL, and Db2, the installation automatically writes the JDBC CLASS for the standard driver.
- For other databases and drivers, you are prompted to provide the JDBC CLASS.

The JDBC class value is stored in the WebFOCUS configuration file, `install.cfg`. You can edit this file if you need to alter the JDBC driver information and provide a different JDBC class value.

JDBC URL

The JDBC URL is a value used to access the driver and repository. This varies depending on the driver and other connection information.

During the WebFOCUS Client installation, the JDBC URL is set based on the selected database.

- For Oracle, SQL Server, MySQL, and Db2, you are prompted for specific information needed to access your repository. This varies depending on the type of database and may include the host name or port where your database resides. The installation uses this information to create the JDBC URL.
- For other databases and drivers, you must provide the JDBC URL.

The JDBC URL value is stored in the WebFOCUS configuration file, `install.cfg`. You can edit this file if you need to alter the JDBC driver information and provide a different JDBC URL value.

Repository Connection Information

The connection information varies depending on the type of driver and database.

- For Db2, see [Db2 Connection Information](#) on page 176.
- For Derby, see [Derby Connection Information](#) on page 177.
- For MySQL, see [MySQL Connection Information](#) on page 178.
- For Oracle, see [Oracle Connection Information](#) on page 179.
- For SQL Server, see [SQL Server Connection Information](#) on page 180.
- For other repositories, refer to the documentation for your JDBC driver.

Db2 Connection Information

When using a Db2 repository, the connection information varies depending on the operating systems and the driver. The most common Db2 JDBC driver is the Db2 Universal JDBC driver.

During the WebFOCUS Client installation, you are prompted for:

- Database Name.

- Database Server Node (host name).
- Location Name.
- Port (50000 by default).
- Credentials for the account that will own the repository.
- JDBC Driver (com.ibm.db2.jcc.DB2Driver).
- JDBC Path (db2jcc.jar and db2jcc_license_cisuz.jar).

Based on this information, the installation creates the connection information:

- CLASS:

`com.ibm.db2.jcc.DB2Driver`

- URL

- For Universal Db2 JDBC (UDB) Type 4 Driver:

`jdbc:db2://hostname:port/DBName`

where:

`DBName`

Is the database name for the repository.

`LOCName`

Is the Db2 location name.

`hostname`

Is the host name for the Db2 server.

`port`

Is the port for the Db2 server. The default is 324.

- For Universal Db2 JDBC (UDB) Type 2 Driver:

`jdbc:db2:DBName`

Derby Connection Information

In Derby, you create a database and user ID within a Derby Database Server.

During the WebFOCUS Client installation, you are prompted for:

- Database name for the repository (WebFOCUS82, by default).
- Database Server Node (*hostname*, by default).
- Port (1527, by default).
- Account to access the repository (webfocus, by default).
- Database password to access the repository (webfocus, by default).
- JDBC Driver (org.apache.derby.jdbc.ClientDriver).
- JDBC Path (derbyclient.jar).
- ClassName: org.apache.derby.jdbc.ClientDriverConnection URL:
jdbc:derby://<host>:<port>/<database>

Based on this information, the installation creates the connection information:

- CLASS:
`org.apache.derby.jdbc.ClientDriver`
- URL:
`jdbc:derby://<host>:<port>/<database>`

If you install multiple instances of the WebFOCUS Client, you need multiple repositories. To maintain multiple repositories in the same Derby Database Server, create a unique database for each instance.

MySQL Connection Information

In MySQL, you create a database and user ID within a MySQL Database Server. These steps are described in [MySQL Repository Set Up](#) on page 183.

During the WebFOCUS Client installation, you are prompted for:

- Database name for the repository.
- Database Server Node (host name).
- Port (3306, by default).
- Account and password to access the repository.

- ❑ JDBC Driver (`com.mysql.jdbc.Driver`).
- ❑ JDBC Path (`mysql-connector-java-nn-bin.jar` where *nn* is the version number).

Based on this information, the installation creates the connection information:

- ❑ CLASS:

```
com.mysql.jdbc.Driver
```

- ❑ URL:

```
jdbc:mysql://<server>:<port3306>/<database>
```

If you install multiple instances of the WebFOCUS Client, you need multiple repositories. To maintain multiple repositories in the same MySQL Database Server, create a unique database for each instance.

Oracle Connection Information

In Oracle, the account determines which tables and tablespaces are accessible within an Oracle Instance (ORASID). Your DBA should set up access to Oracle for you.

During the WebFOCUS Client installation, you are prompted for:

- ❑ Database Server Node (host name).
- ❑ Port (1521, by default).
- ❑ Credentials for the account that will own the repository.
- ❑ Oracle Instance (ORASID) for the repository.
- ❑ JDBC Driver (`oracle.jdbc.OracleDriver`).
- ❑ JDBC Path (`ojdbc8.jar`).

Based on this information, the installation creates the connection information:

- ❑ CLASS (Oracle 12c or higher):

```
oracle.jdbc.OracleDriver
```

- ❑ URL:

```
jdbc:oracle:thin:@hostname:port:orasic
```

If you install multiple instances of the WebFOCUS Client, you need multiple repositories. To maintain multiple repositories in the same Oracle Instance (ORASID), each repository must have a unique account (owner).

SQL Server Connection Information

In Microsoft SQL Server, you create a database and user ID within a SQL Server Database Server.

During the WebFOCUS Client installation, you are prompted for:

- Database name for the repository.
- Database Server Node (host name).
- Port (1433, by default).
- Account and password to access the repository. At installation, upgrade, or configuration time, the account used by the WebFOCUS installation process to connect to the repository database must be granted db_datawriter, db_datareader, and db_ddladmin roles on the repository database and schema. Alternatively, the object creation and initial data load may be run as a separate utility by a DBA.
- JDBC Driver (com.microsoft.sqlserver.jdbc.SQLServerDriver).
- JDBC Path (type the full path to the JDBC driver. Supported versions of JDBC drivers are posted at

<https://kb.informationbuilders.com/topic/supported-rdbms-and-drivers>

Based on this information, the installation creates the connection information:

- CLASS:

`com.microsoft.sqlserver.jdbc.SQLServerDriver`

- URL:

`jdbc:sqlserver://hostname:port;DatabaseName=databasename`

If you install multiple instances of the WebFOCUS Client, you need multiple repositories. To maintain multiple repositories in the same SQL Server Database Server, create a unique database for each instance. You can use the same user ID for each instance or create a new user ID for each instance.

Sizing Guidelines

You can optionally use the following information to set up your repository. The numbers below assume a maximum of 10,000 schedules will be created at this site. In addition, review the logic below to be sure it applies to your environment.

Reference: **ReportCaster Guidelines for Sizing the Relational Tablespaces**

Table Name	Rows	Max Rows Width (bytes)	Notes
BOTACCES (Report Library only)	2,000	292	One record per access list and 1:m with BOTLIST.
BOTADDR	2,000	101	One record per address list and 1:m with BOTDEST.
BOTCAT (Report Library only)	20,000	751	One record for each schedule in the library. If the schedule is burst, each burst report is a record.
BOTCDATE	20,000	807	Could have multiple records per record in the BOTSCIT file (an average number might be 20). Added for the custom scheduling interval feature.
BOTDEST	20,000	210	One record per destination.
BOTDIST			
BOTJOURN			
BOTLDATA (Report Library only)	10,000	NA	One record per report in the library (blob).
BOTLIB (Report Library only)	10,000	713	One record per report in the library (blob).
BOTLIST (Report Library only)	20,000	298	One record per destination.

Table Name	Rows	Max Rows Width (bytes)	Notes
BOTLOG	10,000	228	One record per job run and a 1:m with BOTLOG2.
BOTLOG2	100,000	361	One record per job message.
BOTPACK	10,000	124	One record per schedule.
BOTPARMS	5,000	369	One record per parameter per task.
BOTSBDS	500	625	One record per designated blackout day per group.
BOTSCHED	10,000	2252	One record per schedule.
BOTSCIT	10,000	590	Could have one record per record in the BOTSCHED file. Added for the custom scheduling interval feature.
BOTSIT			
BOTSTATE	1	256	Contains 1 record. Added for the Failover feature.
BOTTASK	15,000	928	One task per schedule (can have multiple tasks per schedule so 1:m relationship with BOTSCHED).
BOTTELL			
BOTTSKEX	15,000	324	One per task.
BOTWATCH	20,000	330	One record per record in the BOTCAT file. Added for the Library Watch List feature.

The following formula for allocating table space sizes is recommended:

Storage needed = number of bytes of user data x overhead factor

For simple tables (one per table space), an overhead factor of 1.75 is recommended.

Note: The BOTLDATA table uses the BLOB data type, so you should size accordingly.

MySQL Repository Set Up

MySQL is a free open source database server that you can use for the WebFOCUS Repository. Official information on MySQL is available at:

<http://www.mysql.com/>

This section is provided to help those less familiar with MySQL with the installation and configuration of MySQL for use with WebFOCUS.

Installing MySQL

You can install MySQL as follows:

1. Download the MySQL installation program from:

<http://www.mysql.com/>

The following page contains links to download MySQL:

<http://dev.mysql.com/downloads/mysql/5.0.html>

The standard download is sufficient.

The following page includes documentation on installing, configuring, administering, and using MySQL:

<http://dev.mysql.com/doc/mysql/en/index.html>

2. For most platforms, you can download a .tar.gz file and then decompress and extract it to a directory on your system. Then, you need to navigate to the MySQL directory you extracted and execute:

```
scripts/mysql_install_db --user=mysql
```

Be sure to set a password for the root account.

Refer to the MySQL documentation for assistance.

Increasing the max_allowed_packet Parameter Value

When you configure or migrate a MySQL repository for WebFOCUS 8.2, you must increase the size of the max_allowed_packet parameter. MySQL recommends that the value of the max_allowed_packet parameter for MySQL Client and MySQL Server should be increased for applications that use of binary large objects (BLOBs) and character large objects (CLOBs), such as WebFOCUS.

For more information on this topic and how to change the value of the `max_allowed_packet` parameter for MySQL Client and MySQL Server, see the following website:

<http://dev.mysql.com/doc/refman/5.1/en/packet-too-large.html>

Running MySQL

You can start the MySQL daemon as follows:

1. Navigate to the directory where you installed MySQL.
2. Type the following:

```
./bin/mysqld_safe &
```

You can stop MySQL by running the following:

```
./bin/mysqladmin -p -u root shutdown
```

Administering MySQL

You administer MySQL using a tool that you can launch from the shell:

1. Navigate to the MySQL bin directory.
2. Type the following:

```
mysql -h localhost -u root -p
```

3. Provide the password when prompted.

The following prompt should appear:

```
mysql>
```

From this prompt, you can execute SQL commands and administer the database server.

MySQL documentation is available online at the following website:

<http://dev.mysql.com/doc/mysql/en/index.html>

Creating the WebFOCUS Reporting Database and User

You can use the MySQL command line tool to create a database and user for ReportCaster.

Procedure: How to Create a MySQL Database and User

1. Open and sign in to the MySQL Command Line Tool.
2. At the `mysql>` prompt, type the following to create a new empty database for WebFOCUS:

```
CREATE DATABASE webfocus8;
```


where:

`webfocus8`

Is the name of the database you will use for WebFOCUS repository. This is case-sensitive.

You should receive a response like the following:

```
Query OK, 1 row affected (0.03 sec)
```

3. Optionally, confirm that the database was created by typing the following command at the `mysql>` prompt:

```
show databases;
```

You should receive a response that includes your new database. For example:

```
+-----+
| Database |
+-----+
| mysql    |
| webfocus8 |
| test     |
+-----+
3 rows in set (0.00 sec)
```

4. At the `mysql>` prompt, type the following to create a new MySQL user ID and grant it access to the WebFOCUS database:

```
GRANT ALL PRIVILEGES ON
  wf.* TO 'wfuser'@'%'
  IDENTIFIED BY 'wfpass';
```

where:

webfocus8

Is the name of the database you will use for WebFOCUS. This is case-sensitive in some environments.

%

Indicates that the database is accessible from any host. To limit which hosts can access the database, provide the host name or IP address of the machine running the WebFOCUS Client and the ReportCaster Distribution Server in place of `%`. If the application server is on a different machine, you will need to type the command twice to grant access from both hosts.

webfocus8

Is the user ID you are creating. This is case-sensitive in some environments. The user ID and password are part of MySQL and not the operating system.

rcpass

Is the password for the user ID. This is case-sensitive.

If you need to change your password, you can retype the GRANT command to provide the new password. The new values will overwrite any existing password.

5. Optionally, confirm that the user ID was added to the MySQL user table by typing the following command at the `mysql>` prompt:

```
use mysql
```

This selects the default `mysql` database within the MySQL Database Server.

Ensure that the user ID you created exists and is associated with your database by typing the following command at the `mysql>` prompt:

```
select user,host,db from db;
```

This query returns all user IDs and associated host names with the databases they can access. For example:

```
+-----+-----+-----+
| user   | host   | db     |
+-----+-----+-----+
| wfuser | %      | wf     |
+-----+-----+-----+
```

After making user ID changes, you can ensure they are refreshed by typing the following command at the `mysql>` prompt:

```
FLUSH PRIVILEGES;
```

- Optionally, specify the database you created for the repository by typing the following command at the `mysql>` prompt:

```
use wf
```

where:

```
wf
```

Is the name of the database you will use for WebFOCUS. This is case-sensitive in some environments.

- Optionally, confirm there are no tables in the database by typing the following command at the `mysql>` prompt:

```
show tables;
```

If you have not yet created tables, you should receive the following:

```
Empty set (0.00 sec)
```

After creating the repository tables, you can use this to confirm that the tables exist.

Installing the MySQL JDBC Driver

The MySQL JDBC driver is known as MySQL Connector/J 3.1.

1. Download the latest MySQL Connector/J 3.1 from:

<http://www.mysql.com/>

The following page contains links to download MySQL Connector/J 3.1:

<http://dev.mysql.com/downloads/connector/j/3.1.html>

Download the latest ZIP or .tar.gz file containing the source code and Java binary. For example:

`mysql-connector-java-3.1.14.zip`

MySQL has an aggressive release cycle, so the number in this file name may vary.

2. Place the .tar.gz or ZIP file on your UNIX system. If you use FTP, use binary mode.
3. Extract the MySQL JDBC driver JAR file. This file is located in the archive as:

`mysql-connector-java-3.1.14/mysql-connector-java-3.1.14-bin.jar`

The number in the directory and file name, will match the number in the name of the ZIP file you download. MySQL has an aggressive release cycle, so the number in this file name may vary.

If you downloaded a ZIP file, you can use the jar command to extract the JAR file. For example:

```
jar xvf mysql-connector-java-3.1.14.zip
mysql-connector-java-3.1.14/mysql-connector-java-3.1.14-bin.jar
```

4. Specify the path to and including this JAR file when prompted during the WebFOCUS Client and ReportCaster Distribution Server installation. The path to and including this JAR file must be in the CLASSPATH variable used by the WebFOCUS Client application server and by the ReportCaster Distribution Server. Specifying the directory containing the JAR file is not sufficient.

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WebFOCUS

WebFOCUS and ReportCaster
Installation and Configuration
for UNIX
Release 8206



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