

# TIBCO WebFOCUS®

## Installation and Configuration for Windows

*Release 8207*

*June 2021*

*DN4501632.0621*





# Contents

---

<b>1. Introducing TIBCO WebFOCUS® Installation</b> .....	<b>9</b>
About TIBCO WebFOCUS® .....	9
TIBCO WebFOCUS® Installation Overview .....	9
TIBCO WebFOCUS® and Your Network.....	10
TIBCO WebFOCUS® Components.....	10
TIBCO WebFOCUS® Processing.....	11
TIBCO WebFOCUS® Configuration.....	12
ReportCaster Installation Overview .....	15
ReportCaster Components.....	15
ReportCaster Processing.....	15
ReportCaster Configuration.....	16
TIBCO WebFOCUS® Installation and Configuration Steps .....	17
Application Server and Web Application Overview .....	17
Web Servers and Application Servers.....	17
Web Applications.....	18
Running Web Applications.....	18
Accessing Web Applications.....	18
Security and User IDs for TIBCO WebFOCUS® .....	19
Managed Reporting and ReportCaster IDs.....	20
TIBCO WebFOCUS® Reporting Server Security Providers.....	20
TIBCO WebFOCUS® Reporting Server User IDs.....	21
<b>2. TIBCO WebFOCUS® Installation Requirements</b> .....	<b>23</b>
TIBCO WebFOCUS® Installation Requirements .....	23
JVM and J2SE Support Information.....	23
TIBCO WebFOCUS® Machine Requirements.....	24
End User Machine Requirements.....	27
Desktop Requirements.....	28
Communication Requirements.....	28
Web Server and Application Server Requirements.....	29
TIBCO WebFOCUS® Java Requirements.....	30
ReportCaster Distribution Requirements.....	30
TIBCO WebFOCUS® Repository Setup .....	30

Repository Options.....	31
TIBCO WebFOCUS® Repository Pre-Installation Tasks.....	34
Database Collation Utilities .....	35
Possible Errors When Running Scripts.....	39
<b>3. Installing the TIBCO WebFOCUS® Client .....</b>	<b>41</b>
Installing the TIBCO WebFOCUS® Client .....	41
Troubleshooting the Installation.....	57
Upgrading From an Earlier 8.2.x Release to Release 8207 .....	58
Upgrade Installation Steps.....	58
TIBCO WebFOCUS® Search Feature.....	64
Migrating Configuration Files from Release 8.1 Version 05M to Release 8207 .....	64
Configuration File Migration Utility Implementation.....	65
Upgrading In Place from Release 8.1 Version 05M to Release 8207 .....	68
Prerequisites for Upgrading In Place.....	68
Post-Installation Review for Upgrading In Place.....	73
Performing a New Release 8207 Installation Using an Existing 8.2.x TIBCO WebFOCUS®	
Repository .....	74
TIBCO WebFOCUS® Client and ReportCaster Directory Structures .....	77
WebFOCUS Client Directories.....	77
ReportCaster Distribution Server Directories.....	79
File Permissions for TIBCO WebFOCUS® Client Directories.....	80
Uninstalling the TIBCO WebFOCUS® Client .....	81
<b>4. Configuring Web and Application Servers .....</b>	<b>83</b>
Configuration Overview and Options .....	84
Configuration Steps Overview.....	84
Configuring Apache Tomcat .....	87
Java Memory Requirement.....	87
Preparing Tomcat for WebFOCUS.....	88
Creating TIBCO WebFOCUS® Contexts for Tomcat.....	90
Accessing the Shortcut to the Apache Tomcat Properties Window.....	94
Accessing the Tomcat Manager Application.....	95
Verifying the TIBCO WebFOCUS® Configuration With Apache Tomcat.....	95

Configuring Microsoft IIS Version 7.x .....	98
Manually Configuring Microsoft IIS Version 7.x .....	99
Configuring IBM WebSphere .....	107
Configuring Oracle WebLogic .....	118
Java Version Requirement .....	118
Update Java Settings .....	119
WebLogic Post-Installation Step .....	120
<b>5. Post-Installation Verification and Configuration .....</b>	<b>121</b>
TIBCO WebFOCUS® Client Post-Installation Tasks .....	121
Configuring TIBCO WebFOCUS® in a Split Web-Tier and Application Server-Only Environment .....	121
Using the Static Content Server Option .....	122
TIBCO WebFOCUS® Client Verification and Configuration .....	123
Accessing the TIBCO WebFOCUS® Home Page .....	124
Accessing the WebFOCUS Administration Console .....	126
Running the Verification Tool .....	128
Setting WebFOCUS Administration Console Authentication .....	128
Defining Communications to WebFOCUS Reporting Servers .....	129
Setting Tomcat HTTP POST Maximum Size .....	130
TIBCO WebFOCUS® Repository Post-Installation Tasks .....	130
TIBCO WebFOCUS® WebFOCUS Repository Table Creation .....	130
<b>6. ReportCaster Post-Installation Tasks .....</b>	<b>133</b>
ReportCaster Verification .....	133
Testing the TIBCO WebFOCUS® Client .....	133
Starting and Stopping the ReportCaster Distribution Server .....	134
Verifying ReportCaster .....	135
Importing and Exporting the ReportCaster Configuration File .....	136
ReportCaster Configuration .....	138
Configuring the Memory Available for the ReportCaster Log Report .....	138
Configuring the Heap Size for the ReportCaster Distribution Server .....	138
Configuring ReportCaster Failover and Workload Distribution .....	139
Adding Support for UTF-8 to the Distribution Server .....	140

Important Configuration Considerations When the Distribution Server is Installed Separately From the TIBCO WebFOCUS® Client. . . . .	141
Configuring Secure Communications to the ReportCaster Distribution Server. . . . .	141
Configuring ReportCaster Web Services in an SSL Environment. . . . .	141
Using the ReportCaster SFTP Key Generation Utility. . . . .	142
<b>7. Business Intelligence Portal and Home Page Verification and Security . . . . .</b>	<b>143</b>
Verifying and Configuring WebFOCUS Business Intelligence Portal . . . . .	143
WebFOCUS Home Page Verification. . . . .	144
<b>8. Troubleshooting TIBCO WebFOCUS® and ReportCaster . . . . .</b>	<b>147</b>
TIBCO WebFOCUS® Troubleshooting Tips . . . . .	147
General Tips. . . . .	147
HTTP 500 Internal Server Message. . . . .	148
Web Browser Issues. . . . .	148
JVM Support Issue with IBM WebSphere Application Server. . . . .	149
Web and Application Server Debugging. . . . .	149
Java Memory Issues. . . . .	150
Graphics Issues. . . . .	151
TIBCO WebFOCUS® Web Server Host Name and Port Settings. . . . .	152
Using the jar Utility. . . . .	152
TIBCO WebFOCUS® File Extensions. . . . .	154
Missing Tomcat Context Definition Files. . . . .	155
ReportCaster Troubleshooting Tips . . . . .	156
Troubleshooting Web and Application Server Errors. . . . .	157
Troubleshooting Java Errors. . . . .	157
Troubleshooting ReportCaster Distribution Server Errors. . . . .	158
Troubleshooting Repository Errors. . . . .	158
Troubleshooting Reporting or Delivery Errors. . . . .	159
Turning Distribution Server Traces ON/OFF. . . . .	160
<b>9. Solr Installation and Configuration . . . . .</b>	<b>161</b>
Indexing Existing Content . . . . .	161
<b>A. Configuring TIBCO WebFOCUS® Help . . . . .</b>	<b>165</b>
Deploying TIBCO WebFOCUS® Online Help On-Premise . . . . .	165

Requirements .....	166
Verifying the TIBCO WebFOCUS® Online Help Download File .....	166
Deploying the TIBCO WebFOCUS® Online Help Web Application Using a Context File in Tomcat .....	168
Configuring TIBCO WebFOCUS® to Point to the Help on the Remote Server .....	169
<b>B. Additional Graph Configuration Options .....</b>	<b>171</b>
Graph Options .....	171
Graph Invocation and Generation Options .....	171
PCHOLD (Server Side) Graphics Overview .....	172
HOLD Graphs Overview .....	172
Configurations for HOLD Graphics .....	173
Configuring GRAPHSEVURL .....	174
Configuring for JSCOM3 HOLD .....	174
<b>C. Additional TIBCO WebFOCUS® Repository Topics and Tasks .....</b>	<b>177</b>
Repository JDBC Concepts .....	177
JDBC Overview .....	178
User ID and Password .....	178
JDBC Driver .....	178
JDBC Path .....	179
JDBC Class .....	180
JDBC URL .....	180
Repository Connection Information .....	180
Db2 Connection Information .....	181
Derby Connection Information .....	182
MySQL Connection Information .....	183
Oracle Connection Information .....	183
SQL Server Connection Information .....	184
Sizing Guidelines .....	185
Other TIBCO WebFOCUS® Repository Utilities and Tasks .....	187
TIBCO WebFOCUS® Repository Table Creation .....	187
Changing the TIBCO WebFOCUS® Repository .....	187
SQL Server Pre-Installation Steps .....	190

MySQL Repository Set Up .....	193
Installing MySQL.....	194
Increasing the max_allowed_packet Parameter Value.....	194
Running MySQL.....	194
Administering MySQL.....	195
Creating the TIBCO WebFOCUS® Reporting Database and User.....	195
Installing the MySQL JDBC Driver.....	198
<b>D. Additional TIBCO WebFOCUS® Configuration Options .....</b>	<b>199</b>
Installing Multiple TIBCO WebFOCUS® Instances on the Same Machine .....	199
Installing Additional TIBCO WebFOCUS® Instances.....	199
Configuring Multiple Web and Application Servers.....	201
Tomcat Security Tips .....	202
Tomcat User ID and NTFS Permissions.....	202
<b>Legal and Third-Party Notices .....</b>	<b>205</b>



# Introducing TIBCO WebFOCUS® Installation

---

This chapter provides an overview of the WebFOCUS® installation and configuration procedures.

**In this chapter:**

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

## About TIBCO WebFOCUS®

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®.

## TIBCO WebFOCUS® Installation Overview

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

## TIBCO 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 [TIBCO WebFOCUS® Installation Requirements](#) on page 23.

## TIBCO WebFOCUS® Components

There are two main WebFOCUS components to install:

- ❑ **TIBCO 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 TIBCO WebFOCUS® Reporting Server. The WebFOCUS Client installation includes:

- ❑ Java-based web connectivity components.

- ❑ User interfaces, tools, and utilities.

The following tools are available:

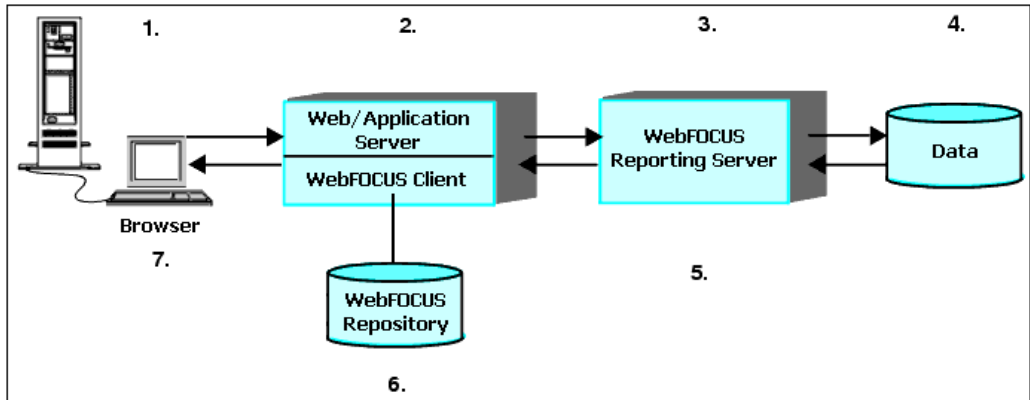
- ❑ **BI Portal.** Enables your organization to grant authorized users access to information they need while restricting unauthorized users from sensitive or confidential data.
- ❑ **Designer.** Enables you to create interactive, responsive pages and meaningful InfoApps, using content that you or other members of your organization create.
- ❑ **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.
- ❑ **ReportCaster.** Provides advanced scheduling and distribution capabilities for WebFOCUS reports, procedures, and alerts, as well as independent files and URLs.
- ❑ **Web Services.** Allows you to develop applications in the .NET or Java environments and perform WebFOCUS functionality from it.
- ❑ **Quick Data.** 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.
- ❑ **Open Portal Services.** Provides seamless integration to Enterprise Information Portals (EIPs) through a Single Sign On enabling you to consume and interact with WebFOCUS content in an easy and secure way.
- ❑ **WebFOCUS® Reporting Server.** The WebFOCUS Reporting Server resides on machines that can access your data. The Reporting Server provides data access, number crunching, and report generation functionality using WebFOCUS integration technology.

## TIBCO 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).



## TIBCO 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.

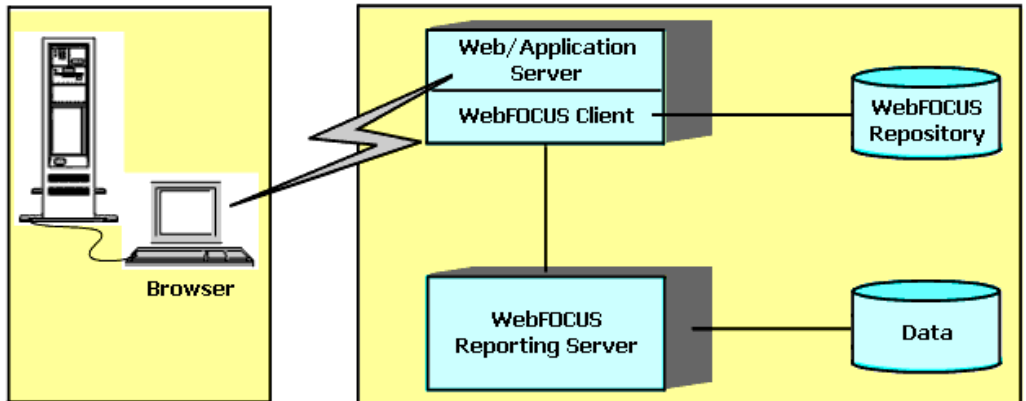
The configuration requirements are:

- 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.

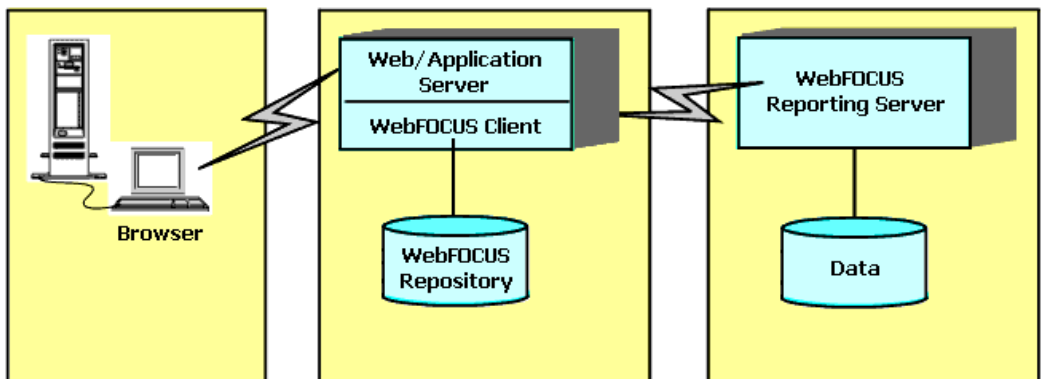
**Note:** All WebFOCUS components must be of the same release to communicate properly.

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

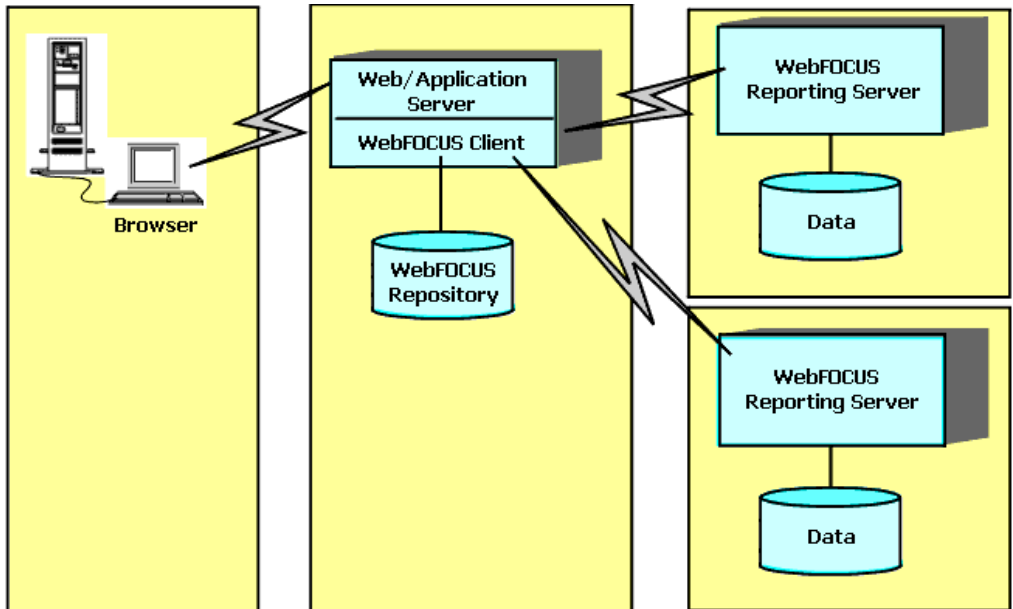
- ❑ **Stand-alone Configuration.** In a stand-alone configuration, the application server, WebFOCUS Client, WebFOCUS Reporting Server, and source data are all on the same machine.



- ❑ **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 *TIBCO 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 [TIBCO WebFOCUS® Installation and Configuration Steps](#) on page 17.

## 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.

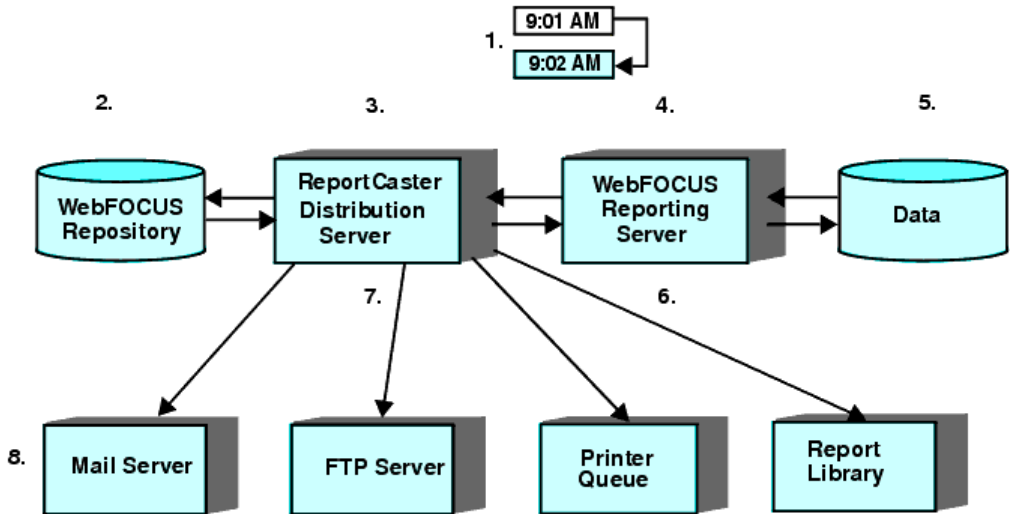
## ReportCaster Processing

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.



## TIBCO WebFOCUS® Installation and Configuration Steps

There are several steps to the installation and configuration process:

1. **WebFOCUS Introduction.** Review this section to ensure you understand the different components involved in the installation.
2. **Pre-Installation Tasks.** Before installing WebFOCUS, 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 *TIBCO WebFOCUS® Reporting Server Installation* manual.
4. **WebFOCUS Client Installation.** Install the WebFOCUS Client, as explained in *Installing the TIBCO WebFOCUS® Client* on page 41.
5. **Web Server or Application Server Configuration.** Configure your web server or application server, as explained in *Configuring Web and Application Servers* on page 83.

**Important:** For a split-tier environment, see *TIBCO WebFOCUS® Client Post-Installation Tasks* on page 121.

6. **WebFOCUS Post-Installation Tasks.** Verify the WebFOCUS configuration and optionally change default settings, as explained in *TIBCO WebFOCUS® Client Post-Installation Tasks* on page 121.
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 *TIBCO WebFOCUS® Reporting Server Administration* manual.

Review the *TIBCO 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 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 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 [TIBCO WebFOCUS® Installation Requirements](#) on page 23.

### 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 are 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 TIBCO WebFOCUS®

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 *TIBCO 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 *TIBCO 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, 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 *TIBCO WebFOCUS® Security and Administration* manual.

## TIBCO 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 *TIBCO WebFOCUS® Reporting 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:

`drive:\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 *TIBCO WebFOCUS® Reporting Server Administration* manual.

## TIBCO 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 [TIBCO WebFOCUS® Client Post-Installation Tasks](#) on page 121.

- ❑ **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:

`drive:\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.

To run with security provider OPSYS on Windows, both the user ID and password stored in admin.cfg must match the Windows user ID and password of the user starting the server. If your operating system password changes or you did not provide the correct password during installation, you must update the password stored by the server through the Web Console. The user ID and password stored by the server in admin.cfg must be kept in sync with the operating system (or domain).

**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 *TIBCO WebFOCUS® Reporting Server Administration* manual.

# Chapter 2

## TIBCO WebFOCUS® Installation Requirements

---

This chapter lists requirements for installing and configuring WebFOCUS on Windows systems.

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

### In this chapter:

- [TIBCO WebFOCUS® Installation Requirements](#)
  - [TIBCO WebFOCUS® Repository Setup](#)
  - [Database Collation Utilities](#)
- 

### TIBCO WebFOCUS® Installation Requirements

Release 8207 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 requirements.

#### JVM and J2SE Support Information

Release 8207 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>

## TIBCO WebFOCUS® Machine Requirements

This table lists basic requirements for the machine or machines that run WebFOCUS. 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 Customer Support for assistance with special configurations.

Item	Options or Requirements	Notes
<b>Operating System</b>	Microsoft® Windows® Server 2019, 2016, 2012, 2012 R2  64-bit (x64)	Microsoft Windows 10 can be used in development environments only.
<b>Memory (RAM)</b>	16 GB or higher.	Refer to any requirements for your application server.
<b>Processor Speed</b>	2 cores, 2.5 GHz or faster.	Refer to any requirements for your application server.
<b>Disk Space</b>	10 GB	Approximately, double this space should be available during the installation process. Additional space is needed for your application servers.



Item	Options or Requirements	Notes
<p><b>Application Server/Servlet Container</b> (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 8207, Tomcat 8.5.x and 9.0.x are supported.</p> <p><b>Note:</b> Apache Tomcat version 9.0.39 is provided as an optional component in the installation package.</p>
<p><b>Java (64-bit)</b></p>	<p>Java Version 8 or Java Version 11</p>	<p>In Release 8207, Java Version 8 and Java Version 11 are supported.</p> <p><b>Note:</b> Oracle JRE 18.0_241 is provided and automatically installs with Release 8207.</p>
<p><b>WebFOCUS Repository</b></p>	<p>TCP/IP access to a Database Server.</p> <p>For JDBC drivers.</p>	<p>A WebFOCUS repository is required to store reports, scheduling, and all WebFOCUS data. You can use any supported database. For more information, see <a href="#">TIBCO WebFOCUS® Repository Setup</a> on page 30.</p> <p><b>Note:</b> Apache Derby version 10.14.2.0 is provided as an optional component in the installation package.</p>

Item	Options or Requirements	Notes
<p><b>Web Server</b> (WebFOCUS Client Machine)</p>	<p>Must support aliasing.</p>	<p>If you choose to use a web server, you have two ways to use it:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> For WebFOCUS processing of aliases.</li> <li><input type="checkbox"/> Only for forwarding requests through a firewall to an application server.</li> </ul> <p>Apache Tomcat is provided and can be used as both a web server and application server. Microsoft IIS and other web servers can be used along with Tomcat or other application servers, if you require. For more information, see <a href="#">Web Server and Application Server Requirements</a> on page 29.</p>
<p><b>Microsoft .NET Framework</b></p>	<p>Version 2.0 or higher.</p>	<p>On Windows AMD 64-bit machines, the Microsoft .NET Framework is required for the Tomcat Connector plug-in to function correctly. It can be downloaded from the Microsoft website and must exist on the machine prior to the WebFOCUS installation. If the Tomcat Connector plug-in will not be configured, Microsoft .NET is not required.</p>

Item	Options or Requirements	Notes
<b>User ID</b>	You must install as an administrator to the Windows machine.	

**Note:**

- ❑ The installation program includes the following third-party components: Tomcat, Oracle JRE, 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 versions of Oracle JRE is available at <https://www.oracle.com/java/technologies/javase-jre8-downloads.html>
- ❑ The latest version of Derby is available at <https://db.apache.org/derby>.

**Note:** Solr Version 8.5.1 is included with each WebFOCUS installation. 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.

## End User Machine Requirements

This section explains the desktop requirements for running WebFOCUS.

## 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
<b>Web Browser</b>	Google Chrome™, Mozilla Firefox®, Microsoft Edge®, and Internet Explorer® 11 are supported.	For more details on browser support, access the following support website: <a href="https://kb.informationbuilders.com/topic/webfocus-8207-browser-information">https://kb.informationbuilders.com/topic/webfocus-8207-browser-information</a>
<b>Adobe Acrobat Reader</b>	WebFOCUS 8.2 is certified with Adobe® Reader® X and Adobe Reader XI.	Acrobat is needed to view PDF reports generated by WebFOCUS.
<b>Adobe Flash Player</b>	WebFOCUS 8.2 is certified with Adobe® Flash® Player 10 and higher.	Required for the Active PDF report output format.

## 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

Apache Tomcat is provided and can be installed with WebFOCUS, so you do not have to install and configure your own web server or application server for WebFOCUS. There are two supported Tomcat options that the WebFOCUS installation can configure for you:

- Tomcat can be used as both an application server and a web server. This is referred to as a Tomcat stand-alone configuration. All processing is done by Tomcat.
- Microsoft IIS can be used as the web server and Tomcat can be used as the application server. This is referred to as a Tomcat with IIS configuration. Static content is served by IIS and dynamic Java content is served by Tomcat.

**Note:** It is also possible to have Tomcat perform all processing and use IIS on a separate machine only to forward requests through a firewall to Tomcat. For that environment, you use a Tomcat stand-alone configuration for WebFOCUS and then configure IIS manually on a separate machine.

Using Apache Tomcat is not required. You can use any application server, servlet container, or servlet engine that meets the specifications described in [JVM and J2SE Support Information](#) on page 23. Other application servers that are commonly used for WebFOCUS are IBM WebSphere or Oracle WebLogic. For additional application server support, contact Customer Support. For background information about web and application servers, see [Application Server and Web Application Overview](#) on page 17.

In this document, the term application server refers to J2EE-compliant application servers, servlet containers, or servlet engines. Technically, Tomcat is a servlet container, but the term application server is used for simplicity.

**Note:** Depending on the level of usage, you may need to increase your application server Java memory options, especially if you use InfoAssist. This is done for you if the WebFOCUS 8.2 installation configures Tomcat. For other application servers, see [Java Memory Issues](#) on page 150.

## TIBCO WebFOCUS® Java Requirements

Java Version 8 is the minimum version required for the WebFOCUS and ReportCaster application servers, as well as the Distribution Server. The WebFOCUS Client installation installs JRE 8 for you. We recommend installing the JDK on a WebFOCUS Reporting Server machine.

A JRE contains a subset of JDK features and both the JRE and JDK are needed. When you install the JDK, a JRE is also installed, by default. Accept default settings when you install the JDK.

### **Note:**

- Java SDK and JDK are synonymous.
- Some application servers require a specific release of the JDK. If you are not using Tomcat, review the documentation for your application server to determine the JDK requirements.

## 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.

## TIBCO 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 TIBCO WebFOCUS® Client](#) on page 41.

## 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 TIBCO WebFOCUS® Repository Topics and Tasks](#) on page 177.

- 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 TIBCO WebFOCUS® Repository Topics and Tasks](#) on page 177.

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 193 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.

### TIBCO 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.

#### **Procedure: How to Prepare for a TIBCO WebFOCUS® Repository**

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.

For SQL Server, the database must use SQL Server authentication rather than Windows authentication, and the user ID must have db\_owner rights to the repository database.

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.

**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-installation. Then, run the WFRPosUtilCMDLine.
- Exit the installation, correct the database collation, and rerun the installation.

## Database Collation Utilities

WebFOCUS includes utilities that enable you to check and change the database collation to ensure it meets WebFOCUS requirements. Databases used as the WebFOCUS repository must be case sensitive.

These utilities are supported with Microsoft SQL Server and MySQL databases and enable you to change the database collation from case insensitive to case sensitive.

The following is a list and description of the available utilities. The utilities are located in the *drive:\jbi\WebFOCUS82\utilities\dbupdate\collation\* folder.

### **check\_db\_collation.bat**

- 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
```

### **check\_install\_db\_collation.bat**

- Checks if the database collation is case sensitive.
- Prompts for the database repository ID and password.

Output example:

```
[2017-11-21 09:54:23,996] INFO stdout - Starting
collation_tool_install(check_cs_collation) process ...
[2017-11-21 09:54:24,384] OFF stdout - Database collation is case
sensitivedb_help.bat
```

### **change\_db\_collation.bat**

- 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.
```

### **change\_install\_db\_collation.bat**

- Changes the database collation to the best matched CS collation.
- Prompts for the database repository ID and password.

Output example:

```
[2017-11-21 09:56:18,174] INFO stdout - Starting
collation_tool_install(collation_change) process ...
[2017-11-21 09:56:19,616] OFF stdout - Collation changed.
```

### **get\_db\_collation.bat**

- 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'
```

#### **get\_install\_db\_collation.bat**

- Retrieves database collation.
- Prompts for the database repository ID and password.

Output example:

```
[2017-12-05 13:24:41,121] INFO stdout - Starting
collation_tool_install(get_current) process ...
[2017-12-05 13:24:41,481] OFF stdout - Database collation:
'Japanese_90_CI_AS_WS_SC'
```

#### **list\_db\_CS\_collations.bat**

- 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\_install\_db\_CS\_collations.bat**

- Lists all case sensitive collations supported by the database.
- Prompts for the database repository ID and password.

Output example:

```
"Japanese_CS_AI","Japanese, case-sensitive, accent-insensitive, kanatype-insensitive, width-insensitive", "932"
"Japanese_CS_AI_WS","Japanese, case-sensitive, accent-insensitive, kanatype-insensitive, width-sensitive", "932"
"Japanese_CS_AI_KS","Japanese, case-sensitive, accent-insensitive, kanatype-sensitive, width-insensitive", "932"
"Japanese_CS_AI_KS_WS","Japanese, case-sensitive, accent-insensitive, kanatype-sensitive, width-sensitive", "932"
```

### **list\_db\_CS\_compatible\_collations.bat**

- 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"
```

### **list\_install\_db\_CS\_compatible\_collations.bat**

- Retrieves the list of CS collations compatible with the specified collation.
- Prompts for the database repository ID and password.

Output example:

```
[2017-12-05 13:42:14,867] 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"
```

### db\_collation.bat

Called by all collation scripts.

**Note:** To run the utilities on Windows, open the Command Prompt with the Run as administrator option and enter the name of the script.

Scripts generate logs in the ..\WebFOCUS82\application\_logs folder, using naming convention script name followed by date/time, for example, check\_db\_collation\_2017-12-13\_12-41-07.log.

When running the scripts against a new database (not using the database specified in install.cfg), the tools prompt for:

1. Database connection URL, for example:

```
jdbc:sqlserver://host_machine_name:
1433;DatabaseName=WebFOCUS8205WebFOCUS8206WebFOCUS8207
```

2. JDBC driver class, for example:

```
com.microsoft.sqlserver.jdbc.SQLServerDriver
```

3. Database Repository User Name
4. Database Password

## 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]
```



This topic provides details about installing the WebFOCUS Client.

**In this chapter:**

- [Installing the TIBCO WebFOCUS® Client](#)
  - [Upgrading From an Earlier 8.2.x Release to Release 8207](#)
  - [Migrating Configuration Files from Release 8.1 Version 05M to Release 8207](#)
  - [Upgrading In Place from Release 8.1 Version 05M to Release 8207](#)
  - [Performing a New Release 8207 Installation Using an Existing 8.2.x TIBCO WebFOCUS® Repository](#)
  - [TIBCO WebFOCUS® Client and ReportCaster Directory Structures](#)
  - [Uninstalling the TIBCO WebFOCUS® Client](#)
- 

### Installing the TIBCO WebFOCUS® Client

The following procedures describe how to install the WebFOCUS Client.

**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 *TIBCO WebFOCUS® Reporting Server Installation* manual.

**Procedure:** **How to Install Using the Typical Installation Option**

1. Download the WebFOCUS Client installation file, and then double-click the executable application file (.exe).
2. Choose the appropriate language from the drop-down list and click *OK*.  
The Welcome to WebFOCUS 8.2 window opens, recommending that you quit all programs before continuing with the installation.
3. Click *Next* to continue the installation.  
The License Agreement dialog box opens.
4. Select *I accept the terms of the License Agreement*, and click *Next* to continue the installation.

**Note:** If you have an earlier release of WebFOCUS installed on your machine, the Choose Install Type window opens.

- To update your existing Release 8207 installation to a later 8207 version, select *Update* and the existing instance you want to update.

If you select *Update*, a dialog box opens with a prompt 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 dialog box opens. Continue to step 11.

- To install all available features of WebFOCUS, select *Full Install*. Continue to step 5.
5. Click *Next* to continue the installation.

The Choose Install Set dialog box opens.

6. Select *Typical* and click *Next* to continue the installation.

The Select Program Folder dialog box opens.

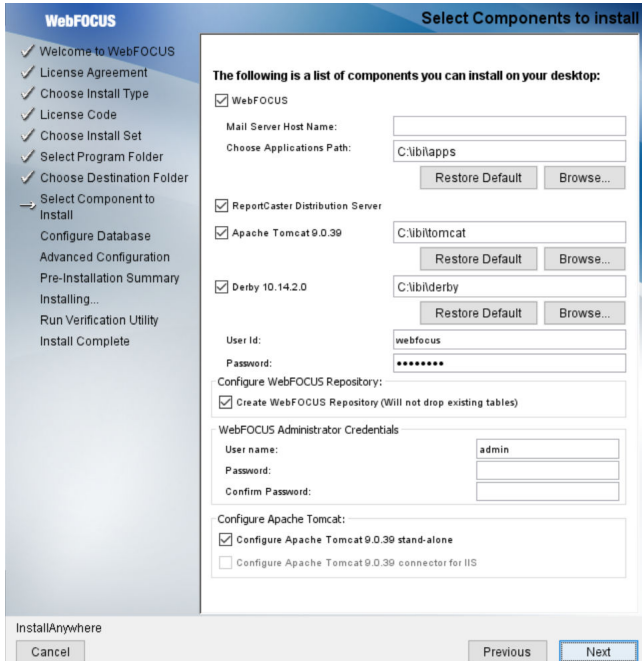
7. Accept the default program folder (WebFOCUS 82) or specify a different program folder name by adding a suffix to the Program Folder name. Then, click *Next*.

**Note:** A message displays if the provided folder name already exists. The folder name must be unique in order to proceed.

The Choose Destination Locations dialog box opens.

8. Perform the following steps:
  - a. Specify a path for the WebFOCUS application folder. The default is C:\ibi.  
**Note:** You can specify any path on the local machine or use a Universal Naming Convention (UNC) path.
  - b. Choose the appropriate disk from the Disk Space Information drop-down list.
  - c. Click *Next*.

The Select Components to install dialog box opens, as shown in the following image.



**Note:** If you specified a UNC path for the WebFOCUS application folder, then the ReportCaster Distribution Server must be installed separately. In the Select Components to install dialog box, the ReportCaster Distribution Server check box will be disabled. In the Advanced Configuration dialog box, you must provide the ReportCaster Distribution Server host and port values that correspond to the system where you are going to install the ReportCaster Distribution Server.

9. Perform the following steps:

- a. In the WebFOCUS component area, type the host name or IP address for your mail server in the Mail Server Host Name field.
- b. Type a path where WebFOCUS applications will be saved in the Choose Applications Path field or accept the default location (C:\ibi\apps).

Options to install Tomcat and Derby are enabled if these components are not preinstalled on your system. Allow these options to be installed and configured with WebFOCUS if you want to use default configuration options.

- If you clear the options to install and configure Tomcat, an application server needs to be configured post-installation.

- If you clear the option to install Derby, or Derby is preinstalled, continue to the next substep.
- c. Select a database (for example, Apache Derby or Microsoft SQL Server) from the Configure pre-existing Database drop-down list.

**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 WFRReposUtilCMDLine.bat 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: caret ( ^ ), ampersand (&), percent ( % ), double quotation marks ( " ). Refer to the ASCII character table to determine the characters to use for the WebFOCUS administrator credentials.

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 WFRReposUtilCMDLine WebFOCUS utility. For more information, see [TIBCO WebFOCUS® Repository Post-Installation Tasks](#) on page 130.
  - 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 8207 level. For more information, see [Performing a New Release 8207 Installation Using an Existing 8.2.x TIBCO WebFOCUS® Repository](#) on page 74.

- ❑ 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.
- d. Click *Next* to accept the remaining default installation components and configuration settings.

The Database Configuration dialog box opens, as shown in the following image. In this example, Apache Derby is being configured, since it was the pre-existing database that was selected.

The screenshot shows the 'Database Configuration for: Apache Derby' dialog box. On the left, a vertical list of installation steps is shown, with 'Configure Database' highlighted. The main area contains several text input fields for configuration: 'DataBase Name' (WebFOCUS82), 'DB Server Node' (127.0.0.1), 'Port' (1527), 'User Id' (webfocus), 'Password' (masked with dots), 'JDBC Driver' (org.apache.derby.jdbc.ClientDriver), and 'JDBC Path' (C:\jbi\derby\lib\derbyclient.jar) with a 'Browse...' button. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

**Note:**

- ❑ The Database Configuration for Apache Derby dialog box opens if you have an existing version of Derby installed on your system. In this case, the Derby 10.14.2.0 check box will be disabled in the Select Components to install dialog box. The Database Configuration for Apache Derby dialog box also opens if you uncheck the Derby 10.14.2.0 check box and select the option to use an existing Derby installation.

If the installer detects an existing Derby installation on the machine, the JDBC Path will be populated automatically. Otherwise, the JDBC Path text box will be blank, and the user will have to enter the full path to the jar files.

- For security reasons, the DB Server Node is set to 0.0.0.0 (listens to localhost). If you are running on multiple environments and want to access this Derby from another location, change 0.0.0.0 to the machine name.

In addition, you need to edit the `drive:\ibi\Derby\derby.properties` file and comment the `derby.drda.host=0.0.0.0` line by inserting a number symbol (#) in the first column.

- Click *Next* to continue the installation.

The Pre-Installation Summary window opens.

- Verify that all of the information is correct and click *Install* to continue with the configuration and installation.

As WebFOCUS is being configured on your system, the Please Wait window is displayed.

After WebFOCUS is configured, the Installing WebFOCUS 8.2 dialog box opens. As WebFOCUS is being installed, the Installing WebFOCUS 8.2 dialog box informs you about the installation tasks that are being performed.

When the installation is complete, the Run Verification Utility dialog box appears.



- Select the verification utilities you would like to run and click *Next*. The available utilities are:

- The WebFOCUS Console Verification Utility
- WebFOCUS Online Documentation

The Install Complete window opens, listing the installation directory.

**Note:** Online Help is hosted by our servers. This Help configuration is applied for new installations or when upgrading from an earlier release. The installation package no longer includes the help files, which greatly reduces the installation file size and time required to install and configure the software. If you want to confirm hosted help, you can check the Help Proxy fields on the Application Contexts page of the Administration Console Configuration tab, as shown in the following image.

## Application Contexts

 Help	<input type="text" value="/ibi_apps/ibi_help"/>
 Help Proxy Host and Port	<input type="text" value="onlinehelp.informationbuilders.com"/>
 Help Proxy Context	<input type="text" value="/wfappent/8207"/>
 Help Proxy Secure	<input checked="" type="checkbox"/>

If you are restricted from using Hosted Help, see *Configuring TIBCO WebFOCUS® Help* on page 165 for instructions on how to install Online Help on your own internal application server.

13. If you performed an upgrade installation, ensure that the application server cache is cleared prior to using the new installation.

In addition, use the Role Update Utility available in the 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 of the Role Update Utility upgrading to Release 8207. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access Designer.

Role Name	Privileges	Repository	Packaged Role
DomainAdvancedUser	Show : <input checked="" type="radio"/> Differences <input type="radio"/> All Basic Reporting Run Procedures with Insight Advanced Reporting Designer 2 new privileges in package Add missing privileges to repository role Replace repository role	-	*
DomainBasicUser	Show : <input checked="" type="radio"/> Differences <input type="radio"/> All Basic Reporting Run Procedures with Insight 1 new privileges in package Add missing privileges to repository role Replace repository role	-	*
DomainDeveloper	Show : <input checked="" type="radio"/> Differences <input type="radio"/> All Basic Reporting Run Procedures with Insight Advanced Reporting Designer 2 new privileges in package Add missing privileges to repository role Replace repository role	-	*
DomainDeveloperChangeOwnershipScope	Show : <input checked="" type="radio"/> Differences <input type="radio"/> All No privilege differences between package and repository		

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 Install Using the Custom Installation Option**

1. Download the WebFOCUS Client installation file, and then double-click the executable application file (.exe).
2. Choose the appropriate language from the drop-down list and click *OK*.

The Welcome to WebFOCUS 8.2 window opens, recommending that you quit all programs before continuing with the installation.

3. Click *Next* to continue the installation.
4. Select *I accept the terms of the License Agreement*, and click *Next* to continue the installation.

The Choose Install Type dialog box opens. Select one of the following:

- To update your existing Release 8207 installation to a later 8207 version, select *Update* and the existing instance you want to update.

If you select *Update*, a dialog box opens with a prompt 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, connection to the database must be available (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.

The Pre-Installation Summary dialog box opens. Continue to step 13.

- To install all available features of WebFOCUS, select *Full Install*. Continue to step 5.
5. Click *Next*.

The Choose Install Set dialog box opens.

6. Select *Custom* and click *Next* to continue the installation.

The Select Program Folder dialog box opens.

7. Accept the default program folder (WebFOCUS 82) or specify a different program folder name by adding a suffix to the Program Group name. Then, click *Next*.

**Note:** A message displays if the provided folder name already exists. The folder name must be unique in order to proceed.

The Choose Destination Locations dialog box opens.



8. Perform the following steps:
  - a. Specify a path for the WebFOCUS application folder. The default is C:\ibi.
  - Note:** You can specify any path on the local machine or use a Universal Naming Convention (UNC) path.
  - b. Choose the appropriate disk from the Disk Space Information drop-down list.
  - c. Click *Next*.

The Select Components to install dialog box opens, as shown in the following image.

The screenshot shows the 'Select Components to Install' dialog box for WebFOCUS. The left sidebar contains a list of installation steps, with 'Select Component to Install' selected. The main area is titled 'The following is a list of components you can install on your desktop:' and contains several sections:

- WebFOCUS: Includes fields for 'Mail Server Host Name' and 'Choose Applications Path' (set to C:\ibi\apps), with 'Restore Default' and 'Browse...' buttons.
- ReportCaster Distribution Server
- Apache Tomcat 9.0.39: Includes a path field (C:\ibi\tomcat) and 'Restore Default' and 'Browse...' buttons.
- Derby 10.14.2.0: Includes a path field (C:\ibi\derby) and 'Restore Default' and 'Browse...' buttons.
- User ID: webfocus
- Password: [masked]
- Configure WebFOCUS Repository:  Create WebFOCUS Repository (Will not drop existing tables)
- WebFOCUS Administrator Credentials: User name: admin, Password: [masked], Confirm Password: [masked]
- Configure Apache Tomcat:  Configure Apache Tomcat 9.0.39 stand-alone,  Configure Apache Tomcat 9.0.39 connector for IIS

At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons. The 'Next' button is highlighted with a blue border.

**Note:** If you specified a UNC path for the WebFOCUS application folder, then the ReportCaster Distribution Server must be installed separately. In the Select Components to install dialog box, the ReportCaster Distribution Server check box will be disabled. In the Advanced Configuration dialog box, you must provide the ReportCaster Distribution Server host and port values that correspond to the system where you are going to install the ReportCaster Distribution Server.

9. Perform the following steps:
  - a. In the WebFOCUS component area, type the host name or IP address for your mail server in the Mail Server Host Name field.
  - b. Type a path where WebFOCUS applications will be saved in the Choose Applications Path field or accept the default location (C:\ibi\apps).

Options to install Tomcat and Derby are enabled if these components are not preinstalled on your system. Allow these options to be installed and configured with WebFOCUS if you want to use default configuration options.

- If you clear the options to install and configure Tomcat, an application server needs to be configured post-installation.
  - If you clear the option to install Derby, or Derby is preinstalled, continue to the next substep.
- c. Select a database (for example, Apache Derby or Microsoft SQL Server) from the Configure pre-existing Database drop-down list.

**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 WFRPosUtilCMDLine.bat 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: caret ( ^ ), ampersand (&), percent ( % ), double quotation marks ( " ). Refer to the ASCII character table to determine the characters to use for the WebFOCUS administrator credentials. For more information, see the following website:

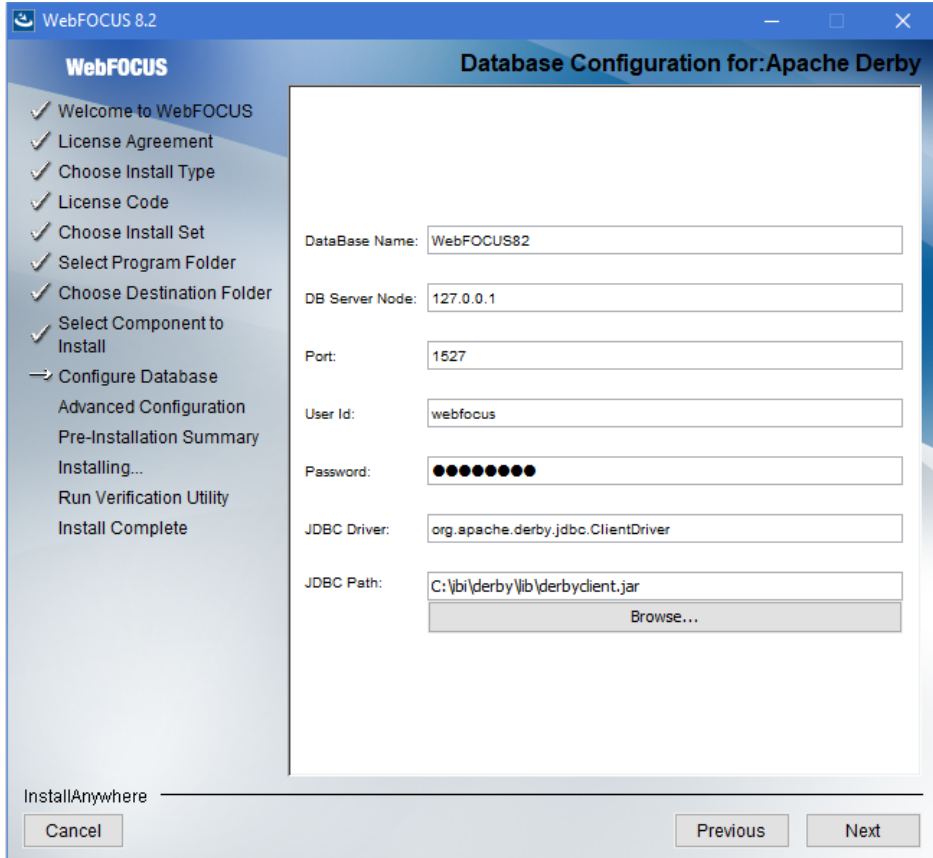
[https://msdn.microsoft.com/en-us/library/60ecse8t\(v=vs.71\).aspx](https://msdn.microsoft.com/en-us/library/60ecse8t(v=vs.71).aspx)

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 WReposUtilCMDLine WebFOCUS utility. For more information, see [TIBCO WebFOCUS® WebFOCUS Repository Table Creation](#) on page 130.
  - 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 8207 level. For more information, see [Performing a New Release 8207 Installation Using an Existing 8.2.x TIBCO WebFOCUS® Repository](#) on page 74.
  - 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.
- d. Click *Next* to accept the remaining default installation components and configuration settings.

The Database Configuration dialog box opens, as shown in the following image. In this example, Apache Derby is being configured, since it was the pre-existing database that was selected.



**Note:**

- ❑ The Database Configuration for Apache Derby dialog box opens if you have an existing version of Derby installed on your system. In this case, the Derby 10.14.2.0 check box will be disabled in the Select Components to install dialog box. The Database Configuration for Apache Derby dialog box also opens if you uncheck the Derby 10.14.2.0 check box and select the option to use an existing Derby installation.

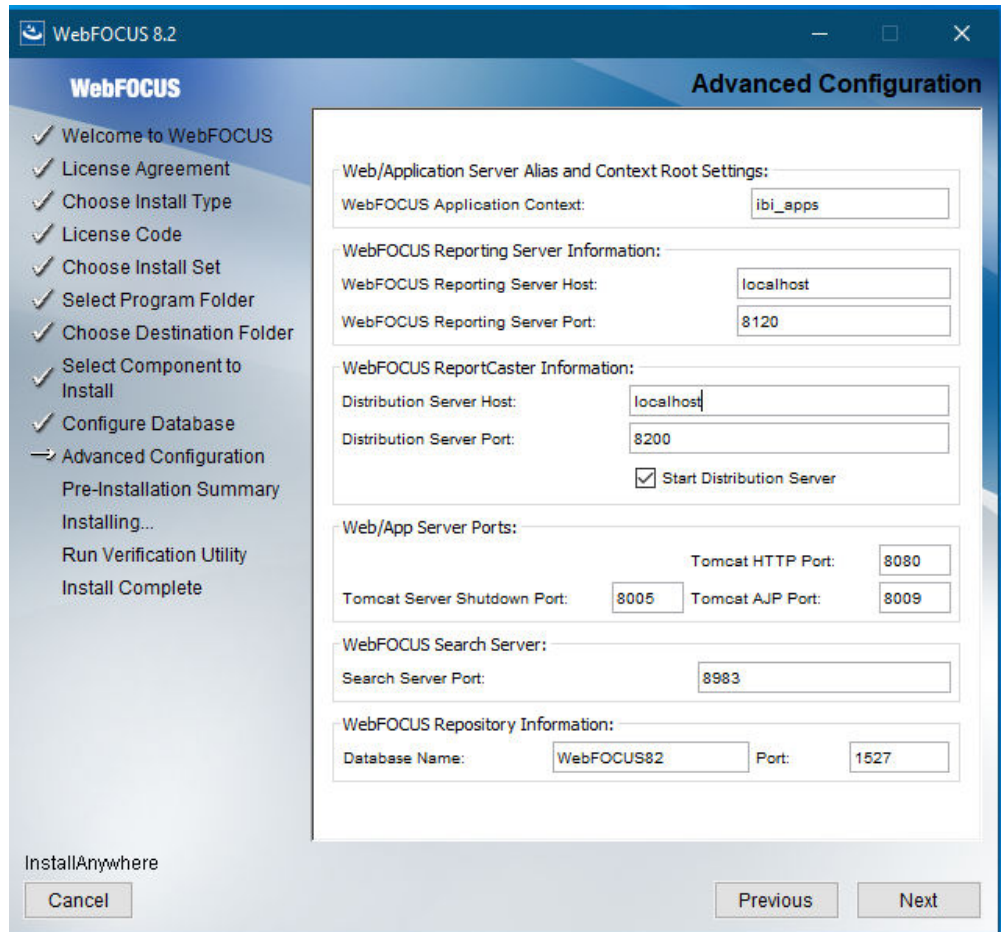
If the installer detects an existing Derby installation on the machine, the JDBC Path will be populated automatically. Otherwise, the JDBC Path text box will be blank, and the user will have to enter the full path to the jar files.

- ❑ For security reasons, the DB Server Node is set to 0.0.0.0. If you are running on multiple environments and want to access this Derby from another location, change 0.0.0.0 to the machine name.

In addition, you need to edit the `drive:\ibi\Derby\derby.properties` file and comment the `derby.drda.host=0.0.0.0` line by inserting a number symbol (#) in the first column.

10. Click *Next*.

The Advanced Configuration dialog box opens, as shown in the following image.







11. Perform the following steps:

- a. In the WebFOCUS Application Context field, type a context root or accept the default (`ibi_apps`).

- b. In the WebFOCUS Reporting Server Host field, type a host name or accept the default. The default WebFOCUS Reporting Server host is the name of the machine where WebFOCUS is being installed.
- c. In the WebFOCUS Reporting Server Port field, type a server port or accept the default (8120).
- d. In the Distribution Server Host field, type a host name. The default Distribution Server host is the name of the machine where WebFOCUS is being installed.
- e. In the Distribution Server Port field, type a server port or accept the default (8200).
- f. In the Web/App Server Ports area, specify the port values that are being used by your application server.
- g. In the WebFOCUS Search Server area, the installation checks if default port 8983 is open and available to use. If the port is in use (busy), the installation program checks for another port and allows you to change and specify a custom port.

**Note:** Online Help is hosted by our servers and the WebFOCUS Help Context field has been removed from the Advanced Configuration dialog box. This Help configuration is applied for new installations or when upgrading from an earlier release. The installation package no longer includes the help files, which greatly reduces the installation file size and time required to install and configure the software. If you want to confirm hosted help, you can check the Help Proxy fields on the Application Contexts page of the Administration Console Configuration tab, as shown in the following image.

### Application Contexts

 Help	<input type="text" value="/ibi_apps/ibi_help"/>
 Help Proxy Host and Port	<input type="text" value="onlinehelp.informationbuilders.com"/>
 Help Proxy Context	<input type="text" value="/wfappent/8207"/>
 Help Proxy Secure	<input checked="" type="checkbox"/>

If you are restricted from using Hosted Help, see [Configuring TIBCO WebFOCUS® Help](#) on page 165 for instructions on how to install Online Help on your own internal application server.

12. Click *Next* to continue the installation.

The Pre-Installation Summary window opens.

13. Verify that all of the information is correct and click *Install* to continue with the configuration and installation.

As WebFOCUS is being configured on your system, the Please Wait window is displayed.

After WebFOCUS is configured, the Installing WebFOCUS 8.2 dialog box opens. As WebFOCUS is being installed, the Installing WebFOCUS 8.2 dialog box informs you about the installation tasks that are being performed.

When the installation is complete, the Run Verification Utility dialog box appears.

14. Select the verification utilities you would like to run and click *Next*. The available utilities are:

- The WebFOCUS Console Verification Utility
- WebFOCUS Online Documentation

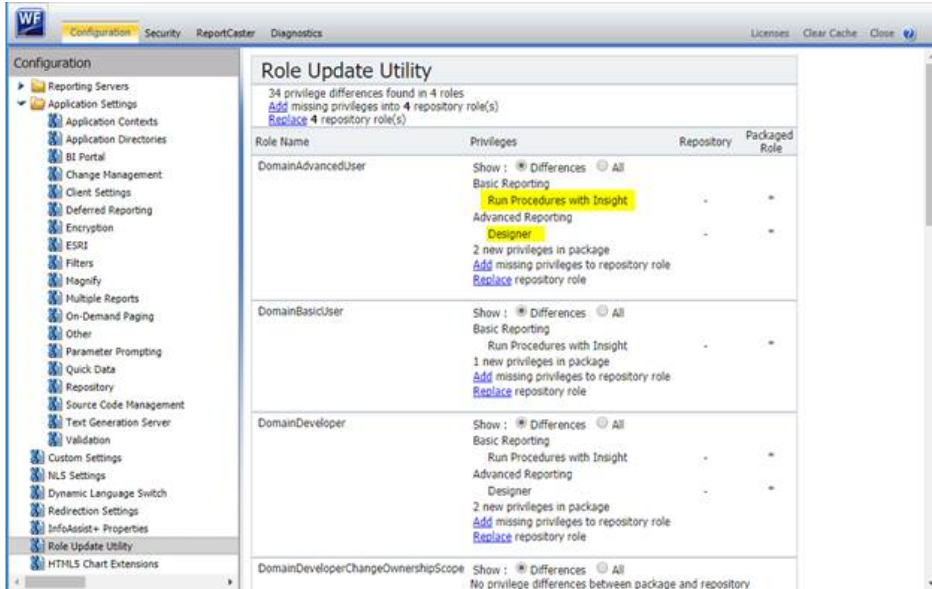
The Install Complete window opens, listing the installation directory.

15. If you performed an upgrade installation, ensure that the application server cache is cleared prior to using the new installation.

In addition, use the Role Update Utility available in the 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 of the Role Update Utility upgrading to Release 8207. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access Designer.



1. Sign in to WebFOCUS as an administrator.
2. Click the User menu, 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 Install TIBCO WebFOCUS® Client Using the Silent Install**

1. To generate the silent install properties file from the command prompt, navigate to the directory where the TIB\_wf-wi\_release\_win\_x86\_64.exe file resides.
2. Enter the following command:

```
TIB_wf-wi_release_win_x86_64.exe -r drive:\fullpath\name.properties
```

**Note:**

- ❑ Replace *release* with the specific WebFOCUS 82 release, for example, TIB\_wf-wi\_8207.27.0\_win\_x86\_64.exe.



- ❑ Always generate the properties file before performing the silent install to ensure that the properties are correct.
  - ❑ The properties file has the extension \*.properties.
  - ❑ You need to specify the full path to where the properties file will be created.
3. To install in silent mode, navigate to the directory where the TIB\_wf-wi\_8207.27.0\_win\_x86\_64.exe file resides and enter the following command:
- ```
TIB_wf-wi_8207.27.0_win_x86_64.exe -i silent -f drive:\fullpath
\name.properties
```

## Troubleshooting the Installation

- ❑ If you experience issues during the installation, due to Java memory resources:
  1. Start the Command Window with the option *Run as administrator* and issue the following command:
 

```
set _JAVA_OPTIONS=-Xmx1024m
```

or

```
set _JAVA_OPTIONS=-Xmx2048m
```

**Note:** The set \_JAVA\_OPTIONS=-Xmx2048m command is recommended.

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

This is a temporary variable applicable for the duration of the Command Window session.
  2. From the same Command Window, navigate to the location of the WebFOCUS installation program and run the installation program.

- ❑ The following are the main trace files for the installation. The names are generated with a date and random number, where *userprofile* is the user ID logged on during the installation.
 

```
C:\Users\userprofile\WebFOCUS82_inst_date#####.log
```

```
C:\Users\userprofile\WebFOCUS82_Install_inst_date#####.log
```

If the server cannot find the Java VM, the JSCOM Listener will not be able to start and the messages will be written to the server log file (edaprint.log), stating that the Java VM cannot be found. To resolve this issue, specify the location of the Java VM in JDK\_HOME or IBI\_JNIPATH. For more information, see the *TIBCO WebFOCUS® Reporting Server Installation* manual.

## Upgrading From an Earlier 8.2.x Release to Release 8207

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 8207.

**Note:** When upgrading to Release 8207.21 and higher, ReportCaster might fail to start if there are encrypted password credentials in the configuration file. For example, for the SMTP Server, if the Java version that is used, does not contain the Java Cryptography Extension (JCE), ReportCaster might fail to start. In order for ReportCaster to work to encrypt and decrypt passwords, ReportCaster requires Java Cryptography Extension (JCE). This applies to both the Application Server and the ReportCaster Distribution Server. This is not an issue if you are using a current version of Java that includes the JCE by default, such as Java version 180\_62.

### 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. Database updates are performed when upgrading from Release 8.2.x.

- ❑ If a database update is required, the `db_inplace_update.bat` 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:  
C:\ibi\WebFOCUS82\utilities\dbupdate\db_inplace_update.bat
```

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 60.

- ❑ 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.

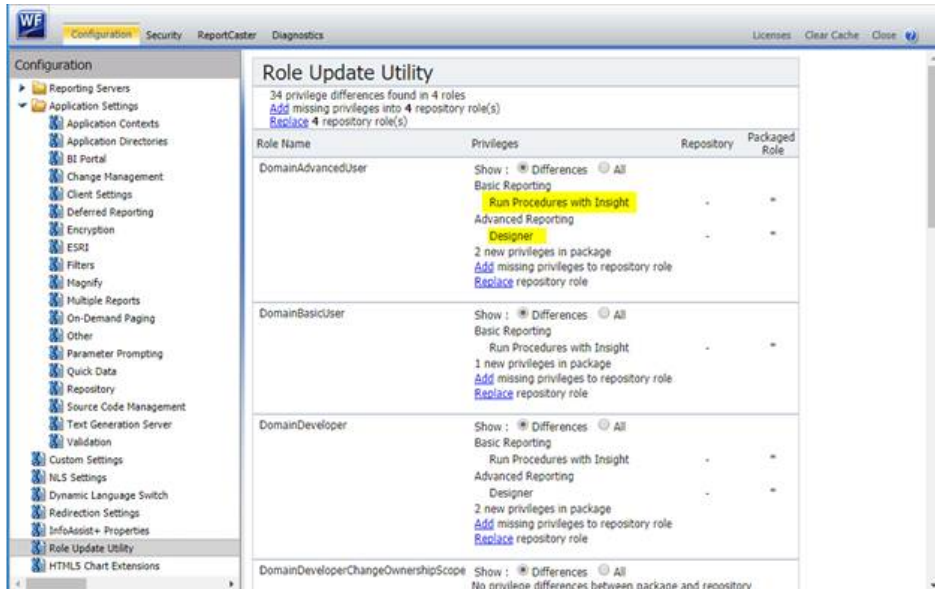
You are prompted for WebFOCUS Administrator credentials during the installation. If communication to the database is not available, or the provided credentials do not have permissions to import Change Management packages, you must manually run the *update\_repos* utility post-installation. See step 6 in [How to Manually Run the Database Utility Post-Installation](#) on page 60.

**Note:** This step is required for all Release 8.2.x upgrades to Release 8207.

- ❑ Use the Role Update Utility available in the 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 of the Role Update Utility upgrading to Release 8207. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access Designer.



1. Sign in to WebFOCUS as an administrator.
2. Click the User menu, 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. **Important:**

When using a WebFOCUS repository created in Release 8206:

- ❑ From your existing Release 8206 installation location, copy `\ibi\WebFOCUS82\utilities\lib\webfocus-applications.jar` to `\ibi\WebFOCUS82\utilities\lib\versions\prior\` of the new 8207 installation location.

When using a WebFOCUS repository created in Release 8205 or earlier release:

- ❑ From your existing 82xx installation location, copy `\ibi\WebFOCUS82\utilities\lib\IBFSCommands.jar` to `\ibi\WebFOCUS82\utilities\lib\versions\prior\` of the new 8207 installation location and rename it to `webfocus-applications.jar`.
- 3. Run the `db_inplace_update.bat` utility. The `db_inplace_update` database utility is stored in the `drive:\ibi\WebFOCUS82\utilities\dbupdate` folder.
 

**Note:** The application server should not be running when running the database update utility.
- 4. Type the database repository user name and password, when prompted.
 

**Note:** Credentials used for the database update utility need privileges to allow table changes.
- 5. After a successful database update, clear the application server cache and then start the application server.
- 6. Confirm that the connection to WebFOCUS is functional and that the content is correct.
- 7. Run the following utility to load new roles and BI Portal page templates into the WebFOCUS repository:

`drive:\ibi\WebFOCUS82\utilities\WFRReposUtil\update_repos.bat`

You will get prompted to provide WebFOCUS administrator credentials.

This utility imports the following Change Management packages:

- ❑ `drive:\ibi\WebFOCUS82\features\bip\managers_group_and_rules.zip`
- ❑ `drive:\ibi\WebFOCUS82\features\bip\bip_page_templates_Vnn.zip`, where *nn* is the version of the package.
- ❑ `drive:\ibi\WebFOCUS82\features\bip\pgx_page_templates_Vnn.zip`, where *nn* is the version of the package.
- ❑ `drive:\ibi\WebFOCUS82\features\bip\themes_Vnn.zip`, where *nn* is the version of the package.
- ❑ `drive:\ibi\WebFOCUS82\features\roles\roles.zip`.

Logs are created in the `drive:\ibi\WebFOCUS82\application_logs` folder under the following names:

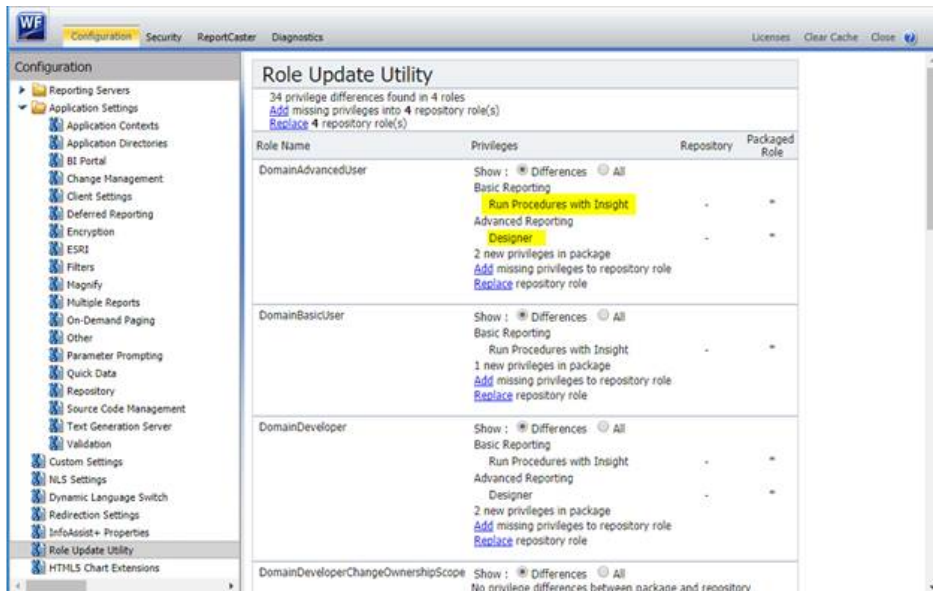
- ❑ `cm_import_bip_page_templates_<date_time>.log`
- ❑ `cm_import_managers_group_and_rules_<date_time>.log`

- ❑ 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

8. Use the Role Update Utility available in the 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 of the Role Update Utility upgrading to Release 8207. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access Designer.



- a. Sign in to WebFOCUS as an administrator.
- b. Click the User menu, point to *Administration*, and then click *Administration Console*.
- c. 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.

- d. 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 `drive:\ibi\WebFOCUS82\utilities\dbupdate\db_check_version.bat` 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 `drive:\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 `drive:\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.
- ReportCaster configuration post-installation:**
  - Upgrades remove and recreate the WebFOCUS ReportCaster service.
  - If the WebFOCUS ReportCaster service was configured using a domain user account as a service logon account, the service needs to be reconfigured with this option after the upgrade completes.

#### **Note:**

- Upgrades backup the entire existing installation in the following folder:  
`drive:\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:  
`drive:\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.

### TIBCO WebFOCUS® Search Feature

Solr is used by the WebFOCUS Search feature.

When performing an upgrade to Release 8207 from an earlier release, the installation program installs and configures Solr as done for new installations and creates a Windows Service named *WebFOCUS Search Server WF82*.

The Solr software is installed under the WebFOCUS installation directory, for example, `\ibi\WebFOCUS82\Solr\` and the software is configured to use default port 8983.

Perform the following steps if you want to modify the port number used by the Search Server.

1. Stop the *WebFOCUS Search Server WF82* service.
2. Remove the service, using the `\ibi\WebFOCUS82\Solr\remove_solr_service.bat` command.
3. Edit the `\ibi\WebFOCUS82\Solr\ibi_solr_service_cfg.ps1` file and change the port number by modifying the `$solrPort = '8983'` line. Ensure that the new port number is available and not used by another application.
4. Install the new service, using the `\ibi\WebFOCUS82\Solr\install_solr_service.bat` command.
5. Update the service startup type and set it to *Automatic*.
6. If you changed the Solr Server port, you should also apply it in the Solr URL setting of the Administration Console. This setting is available under Configuration, Application Settings, Search. For example:

[https://host\\_name:8983/solr](https://host_name:8983/solr)

**Note:** If you want to use a different Solr server instance, update the Search Server information from the Administration Console.

### Migrating Configuration Files from Release 8.1 Version 05M to Release 8207

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 8207, 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 Command line.

The following configuration files will be migrated:

- ❑ webconfig.xml and install.cfg

The install.cfg file in Release 8207 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 8207 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 8207 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 8207 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 8207.

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 8207 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 are:

```
..\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 8207 installation.

Prior to proceeding with the copy, ensure you have backed up the original files from Release 8207.

- ..\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 8207 installation is correct and supports the database repository that is configured in the `install.cfg` file.

```
..\ibi\WebFOCUS82\utilities\setenv\utiluservars.bat
```

- 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 Command line, navigate to the following directory:

```
..\ibi\WebFOCUS82\utilities\lib\
```

2. Run the following command:

```
java -classpath webfocus-applications.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 webfocus-applications.jar
com.ibi.applications.config.WFMigrateConfig
C:\ibi\WebFOCUS81 C:\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:

```
"C:\Program Files\AdoptOpenJDK\jdk-11.0.9.11-hotspot\bin\java"
-classpath webfocus-applications.jarIBFSCommands.jar
com.ibi.applications.config.WFMigrateConfig
C:\ibi\WebFOCUS81 C:\ibi\WebFOCUS82
```

## Upgrading In Place from Release 8.1 Version 05M to Release 8207

The following topic describes how to perform an upgrade in place of content from Release 8.1 Version 05M to Release 8207 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.

### Prerequisites for Upgrading In Place

The following are prerequisites for upgrading in place from Release 8.1 Version 05M to Release 8207:

- ❑ 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 8207 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 9.0.x version. Tomcat 8.5.x and 9.0.x are 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 File Explorer, CMD Window, 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 8207 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:

```
..\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 8207 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:

```
..\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:

```
..\ibi\WebFOCUS81\merge_files\
```

#### **webconfig.xml and install.cfg**

The install.cfg file in Release 8207 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 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 Administration Console.

The configuration file migration utility will not move the following settings. The Release 8207 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 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 8207 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 8207.

- languages.xml.** Entries in this file for Release 8.1.x will be combined with the entries in the Release 8207 version of the file.
- cgivars.wfs.** Settings stored in the ..\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 Microsoft SQL Server or MySQL and collation is CI, the installation program changes the database collation to the best matched CS collation.

13. The upgrade updates the Program group, ReportCaster service, and registry entries.

If the WebFOCUS ReportCaster service was configured using a domain user account as a service logon account, the service needs to be reconfigured with this option after the upgrade completes.

14. Tomcat cache is cleared.

15. Tomcat is restarted.

16. 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. Run `..\ibi\WebFOCUS81\utilities\dbupdate\db_inplace update.bat`.
2. Run `..\ibi\WebFOCUS8105M\utilities\WFRReposUtil\update_repos.bat`.
3. Restart the application server.
4. Ensure all required services are running (application server, WebFOCUS ReportCaster service, WebFOCUS Search Server).
5. Ensure the connection to the database is working.
6. 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.
7. If the web application fails to load, check the application logs and WebFOCUS event.log.
8. Ensure configuration file migration was successful by checking the existence of the following folder:  
`..\ibi\WebFOCUS81\merge_files\`
9. Verify the contents of the `install.cfg` and `webfocus.cfg` files in the following folder:  
`..\ibi\WebFOCUS81\config\`
10. Ensure the jdbc driver set in the following folder is correct, based on the database used as the WebFOCUS repository.  
`..\ibi\WebFOCUS81\utilities\setenv\utiluservars.bat`
11. 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:  
`..\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:

```
..\ibi\WebFOCUS81\utilities\dbupdate\
```

- e. From this location, run:

```
db_inplace_update.bat
```

For example:

```
C:\ibi\WebFOCUS81\utilities\dbupdate\db_inplace_update.bat
```

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

```
..\ibi\WebFOCUS81\utilities\WFReposUtil\update_repos.bat
```

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

## Performing a New Release 8207 Installation Using an Existing 8.2.x TIBCO WebFOCUS® Repository

The following procedure describes how to perform a new Release 8207 installation while using a WebFOCUS repository from an earlier 8.2.x installation.

### **Procedure:** How to Perform a New Release 8207 Installation Using an Existing 8.2.x TIBCO WebFOCUS® Repository

1. Make a copy of your 8.2.x database to be used by the new Release 8207 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 8207.

**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 8207, 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 8207 is available in the `drive:\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. **Important:**

When using a WebFOCUS repository created in Release 8206:

- From your existing Release 8206 installation location, copy `\ibi\WebFOCUS82\utilities\lib\webfocus-applications.jar` to `\ibi\WebFOCUS82\utilities\lib\versions\prior\` of the new 8207 installation location.

When using a WebFOCUS repository created in Release 8205 or earlier release:

- From your existing 82xx installation location, copy `\ibi\WebFOCUS82\utilities\lib\IBFSCommands.jar` to `\ibi\WebFOCUS82\utilities\lib\versions\prior\` of the new 8207 installation location and rename it to `webfocus-applications.jar`.

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

`drive:\ibi\WebFOCUS82\utilities\WFRPosUtil\update_repos.bat`

You will be prompted to provide WebFOCUS administrator credentials.

This utility imports the following Change Management packages:

- `drive:\ibi\WebFOCUS82\features\bip\managers_group_and_rules.zip`
- `drive:\ibi\WebFOCUS82\features\bip\bip_page_templates_Vnn.zip`, where `nn` is the version of the package.

- ❑ *drive:\ibi\WebFOCUS82\features\bip\pgx\_page\_templates\_Vnn.zip*, where *nn* is the version of the package.
- ❑ *drive:\ibi\WebFOCUS82\features\bip\themes\_Vnn.zip*, where *nn* is the version of the package.
- ❑ *drive:\ibi\WebFOCUS82\features\roles\roles.zip*.

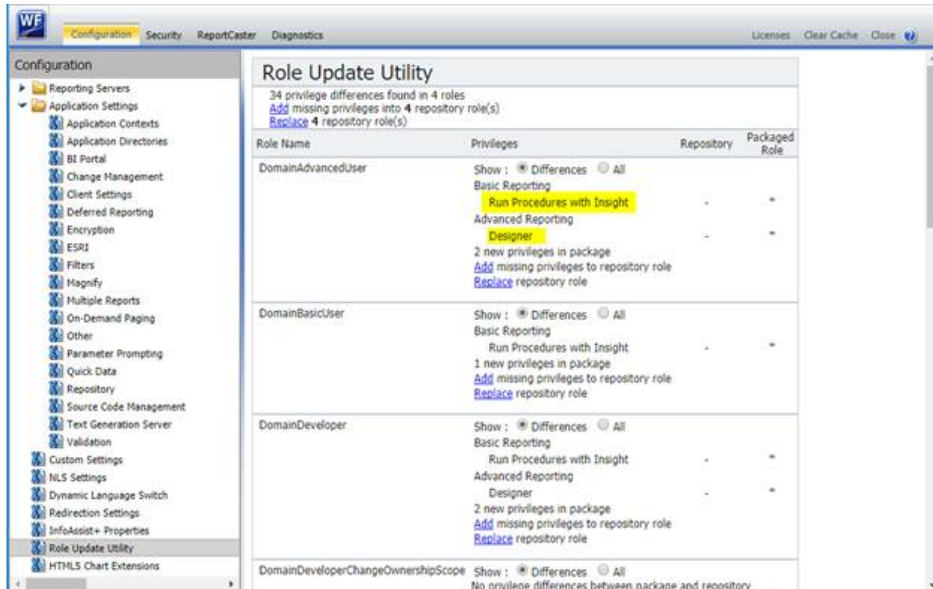
Logs are created in the *drive:\ibi\WebFOCUS82\application\_logs* folder under the following names:

- ❑ *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*

14. Use the Role Update Utility available in the 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 of the Role Update Utility upgrading to Release 8207. The *Run Procedures with Insight* and *Designer* privileges are required to use new functionality, run Insight content, and access 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.

## TIBCO WebFOCUS® Client and ReportCaster Directory Structures

After installation, the WebFOCUS Client and ReportCaster directory structures are created.

### 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:

```
drive:\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:

```
/WebFOCUS82/backup_files_05.22.2021.13.46/
```

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.

### `jre`

Contains Java bundled with WebFOCUS.

### `licenses`

Contains licenses for WebFOCUS and third-party software components.

#### logs

Contains space for log files of system events.

#### 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.

#### Solr

Contains installation files for the Solr engine used by WebFOCUS.

#### 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:

`drive:\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 TIBCO WebFOCUS® Client Directories

Since the WebFOCUS Client runs as part of your web and application servers, the user IDs that run web and application server processes require access to the WebFOCUS Client directories. For Windows, default NTFS permissions are usually sufficient. However, the necessary steps depend on your web and application server.

- ❑ **For Tomcat**, there is normally no need to set NTFS permissions. When Tomcat runs as a service, it runs as the Local System account which has sufficient permissions, by default.

You can optionally enhance security by changing the user ID under which Tomcat runs to an ID with less authority on the machine, and then setting NTFS permissions for this user ID. For more information, see [Additional TIBCO WebFOCUS® Configuration Options](#) on page 199.

- ❑ **For other web and applications servers**, consult your web and application server documentation to determine the user IDs under which your servers run. If your servers do not run as Windows services, the default file system permissions are probably sufficient.

For additional information about permissions and security, see the *TIBCO WebFOCUS® Security and Administration* manual.



## Uninstalling the TIBCO WebFOCUS® Client

Prior to uninstalling the WebFOCUS Client software, ensure that the application server and HTTP server used by WebFOCUS are stopped, and that the WebFOCUS ReportCaster WF82 service is also stopped. You can use the following options to uninstall the WebFOCUS Client:

- ❑ The Information Builders app from the Start menu. You can uninstall the software by selecting the *WebFOCUS 82* folder, and then double-clicking the *Uninstall WebFOCUS 82* shortcut.
- ❑ The command line by executing the uninstall program *Uninstall\_WebFOCUS82.exe* (for example, `C:\ibi\WebFOCUS82\Uninstall_WebFOCUS82\Uninstall_WebFOCUS82.exe`).
- ❑ A silent uninstall, using the command line, by adding the option *-i silent* after the uninstall executable file. For example:

```
C:\ibi\WebFOCUS82\Uninstall_WebFOCUS82\Uninstall_WebFOCUS82.exe -i silent
```





# Chapter 4

## Configuring Web and Application Servers

---

This chapter explains how to configure web and application servers to run WebFOCUS. If the WebFOCUS installation configured them for you and the verification tool ran successfully, then this chapter is optional. However, you should review it if you need to troubleshoot. In addition, if you are new to Apache Tomcat or WebFOCUS, it is a good idea to review this chapter to understand what was configured.

The term application server is used in this section to refer to a servlet container, J2EE Engine, or application server.

The following abbreviation is used for the drive letter of the ibi directory where you install WebFOCUS components on your system:

*drive:\*

Substitute the actual letter on your system when reviewing procedures and examples in this document. Procedures and examples assume default locations and directory names. If you change defaults, substitute accordingly.

### **In this chapter:**

- [Configuration Overview and Options](#)
  - [Configuring Apache Tomcat](#)
  - [Configuring Microsoft IIS Version 7.x](#)
  - [Configuring IBM WebSphere](#)
  - [Configuring Oracle WebLogic](#)
-

## Configuration Overview and Options

WebFOCUS Client components run as part of web servers and application servers. Configuration steps vary depending on which web servers or application servers you use. 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.

### ❑ **Apache Tomcat Stand-alone**

Tomcat can be used as both the web server and application server. If you choose this option, be aware that the default HTTP port for Tomcat is 8080, not 80. Therefore, when calling web server pages in a browser, you must use:

```
http://hostname:8080
```

instead of

```
http://hostname
```

Manual configuration is described in [Configuring Apache Tomcat](#) on page 87.

### ❑ **Microsoft IIS and Apache Tomcat**

Tomcat can be used as the application server while Microsoft IIS is used as the web server. This requires two servers and the configuration of their communications.

Manual configuration is described in [Configuring Apache Tomcat](#) on page 87.

### ❑ **IBM WebSphere Application Server**

For details, see [Configuring IBM WebSphere](#) on page 107.

### ❑ **Other**

Other web servers or application servers can be manually configured. Review your server documentation and perform steps that correspond to the information that follows.

If no web server is available, an application server can be used to handle all processing if the application server has robust HTTP capabilities.

## Configuration Steps Overview

The following is an overview of the steps needed to configure web or application servers for WebFOCUS. For Apache Tomcat, you can review this overview or proceed directly to [Configuring Apache Tomcat](#) on page 87.

**Important:** If you want to install WebFOCUS in a clustered or split-tier environment, see [Configuring TIBCO WebFOCUS® in a Split Web-Tier and Application Server-Only Environment](#) on page 121.

The steps vary depending on the type of configuration you use:

- ❑ **Web Server and Application Server Configuration** (aliases and web applications). In a standard configuration, you can create aliases to traditional static web content in a WebFOCUS directory (ibi\apps) and you deploy the webfocus.war web application on your application server. This is supported when both a web 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.

You can also use the web server to only pass requests to Tomcat through a firewall. In that case, you must deploy all three web applications on your application server.

If your web server and application server are located on different machines, see [Configuring TIBCO WebFOCUS® in a Split Web-Tier and Application Server-Only Environment](#) on page 121.

- ❑ **Application Server Only Configuration** (all web applications). For application servers like IBM WebSphere, Oracle WebLogic, Oracle Application Server, SAP NetWeaver, and Oracle Java System Application Server, you can 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 TIBCO WebFOCUS® in a Split Web-Tier and Application Server-Only Environment](#) on page 121.

**Procedure: How to Configure a Web Server and an Application Server for TIBCO 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. Add the WebFOCUS repository JDBC driver to your application server CLASSPATH.

For information on JDBC drivers, see [Additional TIBCO WebFOCUS® Repository Topics and Tasks](#) on page 177.

3. 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:

`drive:\ibi\WebFOCUS82\webapps\webfocus.war`

It is also provided as the following expanded directory:

`drive:\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. For Tomcat stand-alone, using the expanded directories is recommended. 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/<br>Path  | Doc base or location                                    |
|------------------------|---------------------------------------------------------|
| <code>/ibi_apps</code> | <code>drive:\ibi\WebFOCUS82\webapps\webfocus.war</code> |
| <code>/approot</code>  | <code>drive:\ibi\WebFOCUS82\webapps\approot.war</code>  |

If you are using a web server, you can create aliases for the static content. This maps directories containing WebFOCUS data to directories the web server can reference. The default settings are:

| Default Alias        | Path                         | Access    |
|----------------------|------------------------------|-----------|
| <code>approot</code> | <code>drive:\ibi\apps</code> | Read Only |

On some Windows Servers, you may need to grant Scripts only executable permissions, as well.

4. Ensure your web server routes requests for the `/ibi_apps` and `/approot` web application context roots to the application server.

5. Verify the configuration using the tools in the Administration Console, as explained in [TIBCO WebFOCUS® Client Post-Installation Tasks](#) on page 121.

**Note:** If you are installing multiple instances, completely install and configure a single instance, and then refer to [Additional TIBCO WebFOCUS® Repository Topics and Tasks](#) on page 177 for instructions on configuring the second instance.

## Configuring Apache Tomcat

This section explains how to manually configure Apache Tomcat for use with WebFOCUS. The WebFOCUS installation provided the option to install and configure Apache Tomcat for you. If you chose this option and the verification tool ran successfully, you do not need to manually configure Tomcat. However, if you are new to Tomcat or receive errors, you should review this section to understand the configuration process.

There are two configurations available when using Apache Tomcat:

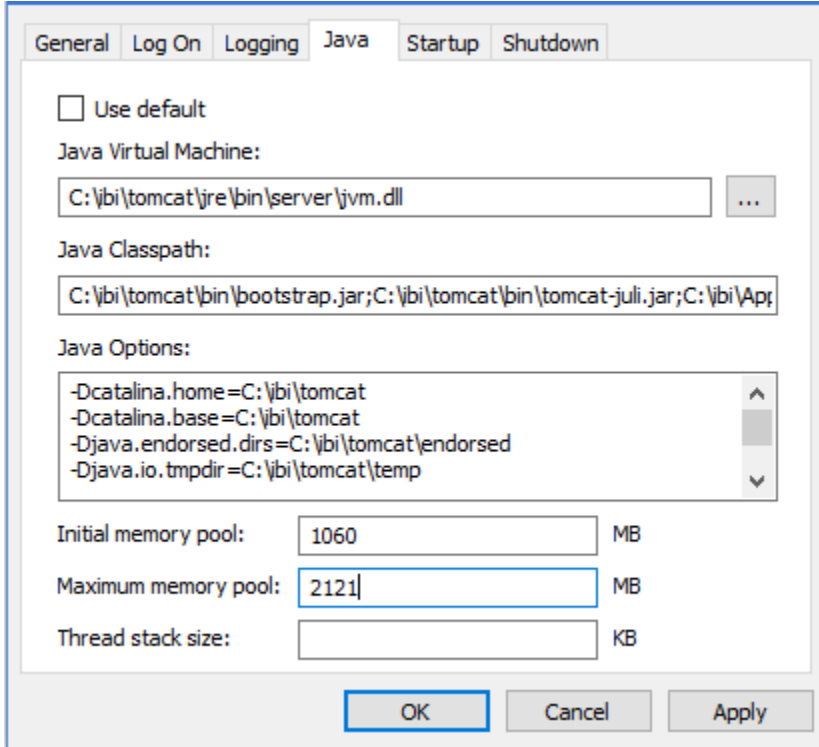
- Tomcat can be used as both a web server and application server. This is referred to as a Tomcat stand-alone configuration and all WebFOCUS processing is done by Tomcat.
- Microsoft IIS can be used as the web server and Tomcat can be used as the application server. This requires configuring two servers and their communications. Processing is then split between Tomcat and IIS.

**Note:** To use IIS to only forward requests to Tomcat through a firewall, configure a Tomcat stand-alone configuration, as explained in this section, and then manually configure the Tomcat Connector.

## Java Memory Requirement

You may need to adjust the Java VM memory options if you run into performance issues.

Open the Tomcat Configuration Utility and select the *Java* tab, as shown in the following image.



Ensure that the Initial memory pool size is at least 1024MB and that the Maximum memory pool size is at least 2048MB.

## Preparing Tomcat for WebFOCUS

It is assumed that Tomcat is installed at this time. If Tomcat is not installed, you can install it from the WebFOCUS Client installation or by downloading the installation utility from:

<http://tomcat.apache.org/>

If you chose to have WebFOCUS configure Tomcat for you, the following steps were performed:

- The default Java memory options were increased. Manually increasing the memory options is explained in [Java Memory Issues](#) on page 150.
- If you use ReportCaster, CLASSPATH was set. Manually setting CLASSPATH is explained in [How to Set CLASSPATH for the Repository Tables](#) on page 89.



- ❑ Contexts were created to deploy or set up aliases for WebFOCUS content. Manually creating contexts is explained in [Creating TIBCO WebFOCUS® Contexts for Tomcat](#) on page 90.

The following steps can be performed to further configure Tomcat:

- ❑ You can secure the web administration tools installed with Tomcat.
- ❑ You can change the default ports that Tomcat uses. This is not normally required, but can be changed, as explained in [Tomcat Ports](#) on page 90.
- ❑ 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:

1. Edit the \$CATALINA\_BASE/conf/server.xml file.
2. In the Connector port section, add the following attribute:

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

3. Save and close the file.
4. Restart Apache Tomcat.

### **Procedure:** How to Set CLASSPATH for the Repository Tables

The JDBC driver location must be in the Tomcat CLASSPATH. Tomcat runs as a Windows service, so CLASSPATH is set in the registry. If you chose to configure Tomcat when you installed WebFOCUS, the installation should have set this for you.

To manually set Java Classpath or troubleshoot, check your Classpath field and be sure to include the JDBC driver.

**Note:** If the driver does not appear, add a semicolon (;) to the end of the *Java Classpath* field. Then, add the absolute path to the JDBC driver for your repository. If more than one file is needed, separate each path with a semicolon (;). Spaces can occur in directory names, but not between the paths and the semicolons (;). Be sure to include the file name and not just the directory containing the file. For example:

```
C:\ibi\tomcat\bin\bootstrap.jar;C:\drivers\sqljdbc.jar
```

For information on JDBC drivers, see [Additional TIBCO WebFOCUS® Repository Topics and Tasks](#) on page 177.

**Reference: Tomcat Ports**

By default, Tomcat uses the three TCP ports listed below.

| Default Port | Name               | Use                                                                                                                                                                                                                       |
|--------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8080         | HTTP Listener Port | You access Tomcat in a web browser using this port. For example:<br><a href="http://hostname:8080">http://hostname:8080</a>                                                                                               |
| 8009         | Connector Port     | Web servers route requests to Tomcat on this port. The Tomcat connector (plug-in) for IIS uses this port. If you change this port and use the connector, change the port in the workers.properties file of the connector. |
| 8005         | Shutdown Port      | Tomcat uses this port for internal operations and for stopping.                                                                                                                                                           |

You normally do not need to change these ports. However, if these ports are not available or you want to change them, do the following:

1. Open the following file in a text editor:  
`C:\ibi\tomcat\conf\server.xml`
2. Search for the port numbers you want to replace (8080, 8009, 8005) and replace them with the ports you want to use.
3. Save and exit the file.

If you change defaults, substitute accordingly in procedures and examples.

**Creating TIBCO WebFOCUS® Contexts for 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:

`drive:\ibi\WebFOCUS82\webapps\webfocus`

when it receives a request for the WebFOCUS context root:

`http://hostname:8080/ibi_apps/`

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

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

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

| Context (path)         | Directory (DocumentBase)                                |
|------------------------|---------------------------------------------------------|
| <code>/ibi_apps</code> | <code>drive:\ibi\WebFOCUS82\webapps\webfocus.war</code> |
| <code>/aproot</code>   | <code>drive:\ibi\WebFOCUS82\webapps\aproot.war</code>   |

- ❑ When using Tomcat as the application server and IIS as the web server, create the following context on Tomcat:

| Context (path)         | Directory (DocumentBase)                                |
|------------------------|---------------------------------------------------------|
| <code>/ibi_apps</code> | <code>drive:\ibi\WebFOCUS82\webapps\webfocus.war</code> |

The aproot context is then created as an alias (Virtual Directories) on IIS. IIS is then configured to send requests for ibi\_apps to Tomcat.

### **Procedure:** How to Configure Apache Tomcat

1. Stop Tomcat from the Windows Services window by right-clicking *Apache Tomcat* and choosing *Stop*.
2. Navigate to the following directory in File Explorer:

`<catalog_home>\conf\Catalina\localhost`

**Note:** If you have an existing version of Tomcat, not installed by a 8.x version of WebFOCUS, the directory will be under:

`<catalog_home>\conf\Catalina\localhost`

This directory can contain XML files that define contexts. If the WebFOCUS installation installed and configured Tomcat for you, the following file should appear to define the `ibi_apps` context that deploys the WebFOCUS directory:

`ibi_apps.xml`

If you are using Tomcat stand-alone, the following should appear, as well:

`approot.xml`

The XML files are named for the context root you would use to access the web application and should have the following syntax:

```
<?xml version='1.0' encoding='utf-8'?>
<Context docBase="path_To_WebApplication" path="/contextRoot">
</Context>
```

where:

*path\_To\_WebApplication*

Is the absolute path to the WAR file or directory you are deploying.

*contextRoot*

Is the context root.

**Note:** They can optionally contain additional information, as explained in the Tomcat documentation.

You can create or edit the files in a text editor, such as Notepad.

3. If the `ibi_apps.xml` file does not exist, create it. For example:

```
<?xml version='1.0' encoding='utf-8'?>
<Context docBase="C:\ibi\WebFOCUS82\webapps\webfocus" path="/ibi_apps"
useHttpOnly="true">
</Context>
```

Be sure to specify the correct directory on your machine and change the context root if you are not using the default (`ibi_apps`).

4. If you are using Tomcat stand-alone, create an `approot.xml` file if it does not exist. For example:

```
<?xml version='1.0' encoding='utf-8'?>
<Context docBase="C:\ibi\apps" path="/approot">
</Context>
```

Be sure to specify the correct directory on your machine.

5. Restart Tomcat from the Services window.

**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 update your existing Release 8207 installation to a later 8207 version. When you upgrade WebFOCUS, 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 previously deployed the expanded directories, the new web applications should be used automatically, but you should remove the following work directory and then restart Tomcat:

```
< catalina_home > \work\Catalina\localhost\ibi_apps
```

```
< catalina_home > \work\Catalina\localhost\aproot (if previously deployed)
```

- ❑ 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 application or remove the corresponding files and directories from the context. For example:

```
< catalina_home > \conf\Catalina\localhost\ibi_apps.xml
```

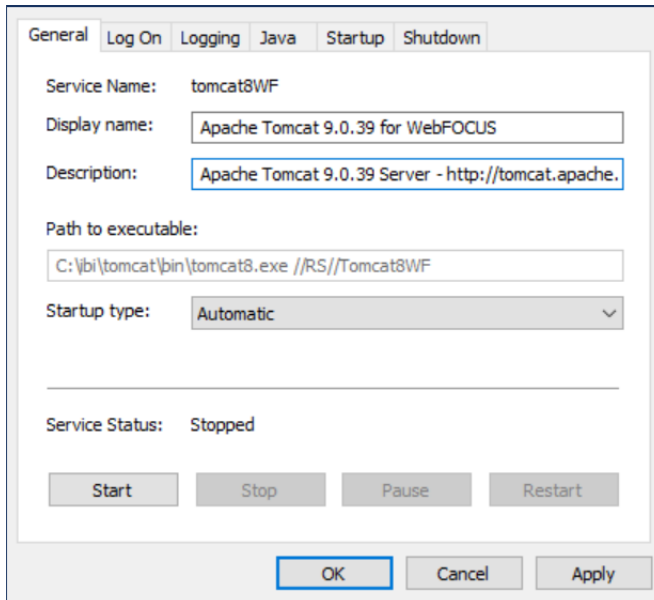
```
< catalina_home > \work\Catalina\localhost\ibi_apps
```

```
< catalina_home > \webapps\ibi_apps
```

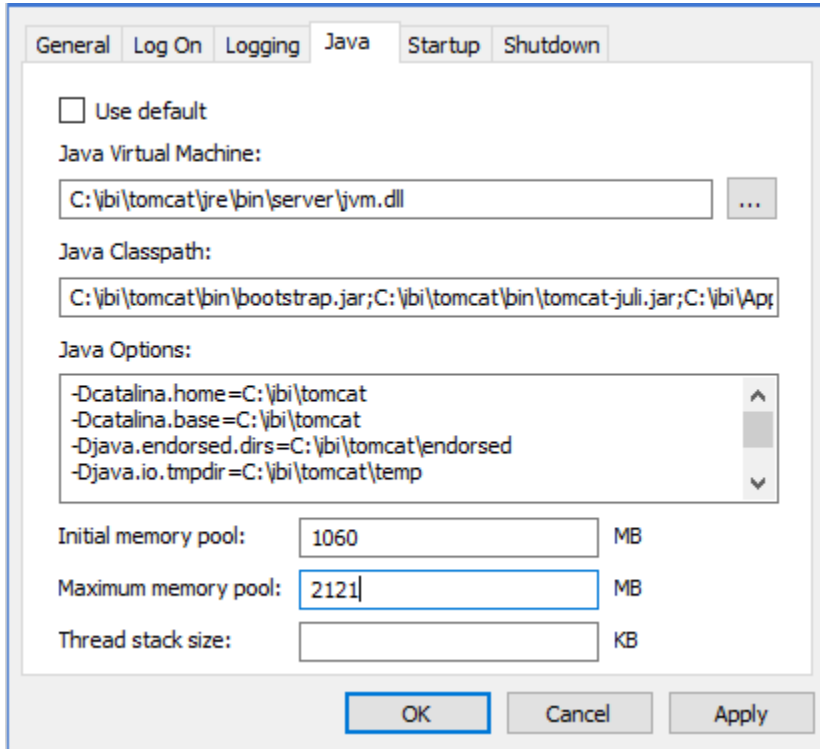
**Note:** When you deploy WAR files, Tomcat expands them into its own directory structure and does not always know the original location.

## Accessing the Shortcut to the Apache Tomcat Properties Window

You can access the Apache Tomcat Properties window by selecting *Programs, Information Builders, Tomcat*, and then *Tomcat Configuration Utility*. The following image shows the Apache Tomcat 9.0.39 for WebFOCUS Properties window.



To change Java memory settings, click the *Java* tab, as shown in the following image.



If required, you can use this tab to modify the Java memory settings after installation.

### Accessing the Tomcat Manager Application

The Tomcat Manager application is packaged with Apache Tomcat. It provides basic functionality to manage web applications that are deployed to Apache Tomcat. It can be used to troubleshoot issues with the deployment or to manually deploy .war files if required. As of WebFOCUS 8.2, the Tomcat Manager application is not deployed automatically.

### Verifying the TIBCO WebFOCUS® Configuration With Apache Tomcat

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

#### **Procedure:** How to Verify the TIBCO 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:

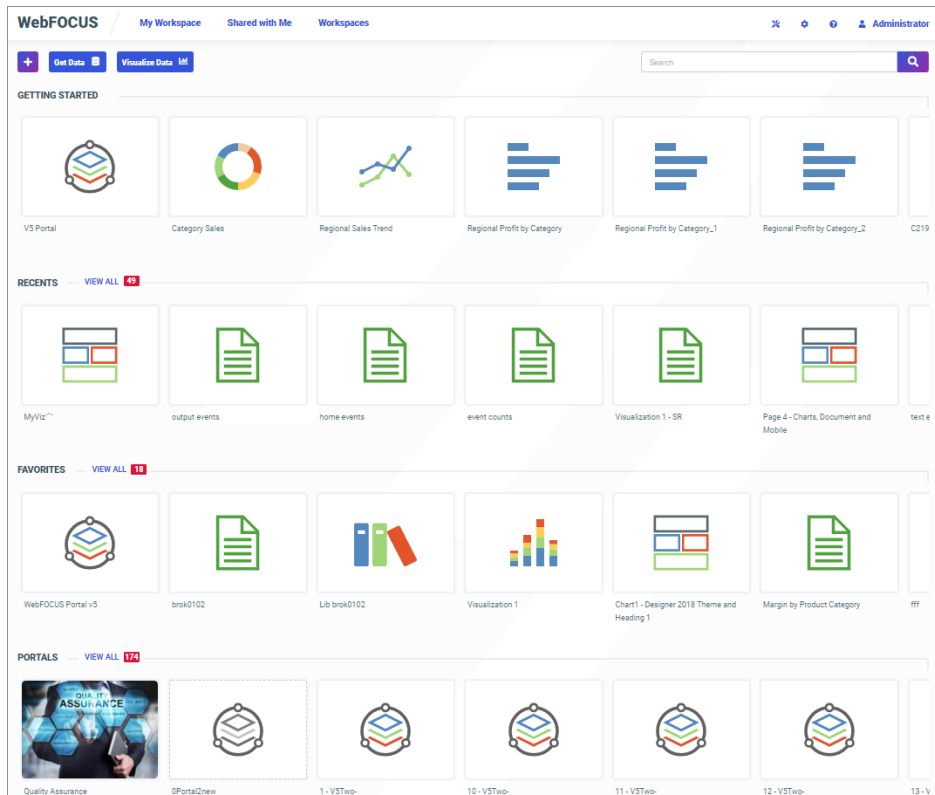
`hostname:port`

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. For Tomcat stand-alone configurations, the default port is 8080. If you require SSL, use https instead of http.

The WebFOCUS Sign In page opens.

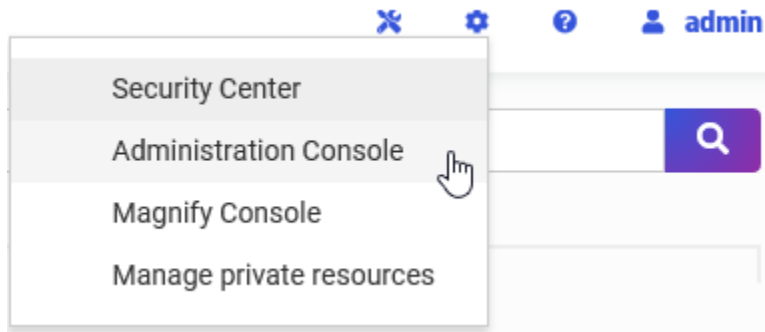
3. Sign in as an administrator. The default user name and password are *admin* and *admin*.

The WebFOCUS Home Page opens in your web browser, as shown in the following image.



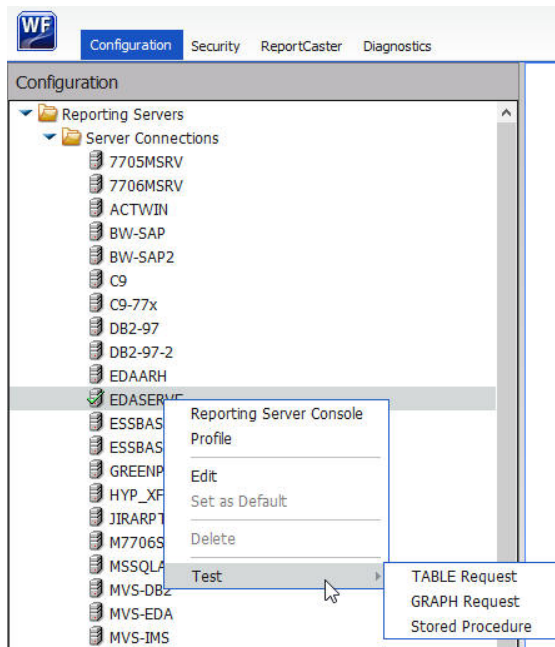


- Click the *Settings* button on the banner, and then click *Administration Console*, as shown in the following image.



The Administration Console opens.

- 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](http://host:[port]/ibi_apps/WFServlet?IBIF_ex=carinst)

8. If you are using Tomcat stand-alone, proceed to *TIBCO WebFOCUS® Client Post-Installation Tasks* on page 121.

## Configuring Microsoft IIS Version 7.x

This section describes how to configure WebFOCUS 8.2 on a Windows server that is using Microsoft IIS version 7.x. As a prerequisite, ensure that Microsoft IIS version 7.x is already installed.

During the WebFOCUS installation, the Select Components to install screen opens, as shown in the following image.

The screenshot shows the 'Select Components to Install' window for WebFOCUS. On the left is a navigation pane with the following items: Welcome to WebFOCUS, License Agreement, Choose Install Type, License Code, Choose Install Set, Select Program Folder, Choose Destination Folder, Select Component to Install (highlighted), Configure Database, Advanced Configuration, Pre-Installation Summary, Installing..., Run Verification Utility, and Install Complete. The main area contains the following sections:

- The following is a list of components you can install on your desktop:**
  - WebFOCUS
    - Mail Server Host Name: [text box]
    - Choose Applications Path: C:\ibiapps [text box] [Restore Default] [Browse...]
  - ReportCaster Distribution Server
  - Apache Tomcat 9.0.39 [C:\ibitomcat] [text box] [Restore Default] [Browse...]
  - Derby 10.14.2.0 [C:\ibiderby] [text box] [Restore Default] [Browse...]
- User Id: webfocus [text box]
- Password: [password box]
- Configure WebFOCUS Repository:
  - Create WebFOCUS Repository (Will not drop existing tables)
- WebFOCUS Administrator Credentials:
  - User name: admin [text box]
  - Password: [password box]
  - Confirm Password: [password box]
- Configure Apache Tomcat:
  - Configure Apache Tomcat 9.0.39 stand-alone
  - Configure Apache Tomcat 9.0.39 connector for IIS

At the bottom, there is an 'InstallAnywhere' label, a 'Cancel' button, and 'Previous' and 'Next' buttons. The 'Next' button is highlighted with a blue border.

Select *Configure Apache Tomcat 9.0.39 connector for IIS* and click *Next* to continue with the installation.

Before configuring Microsoft IIS version 7.x, test your configuration by accessing the following application server port:

[http://localhost:8080/ibi\\_apps/](http://localhost:8080/ibi_apps/)

The installation will now configure Microsoft IIS version 7.x.

## Manually Configuring Microsoft IIS Version 7.x

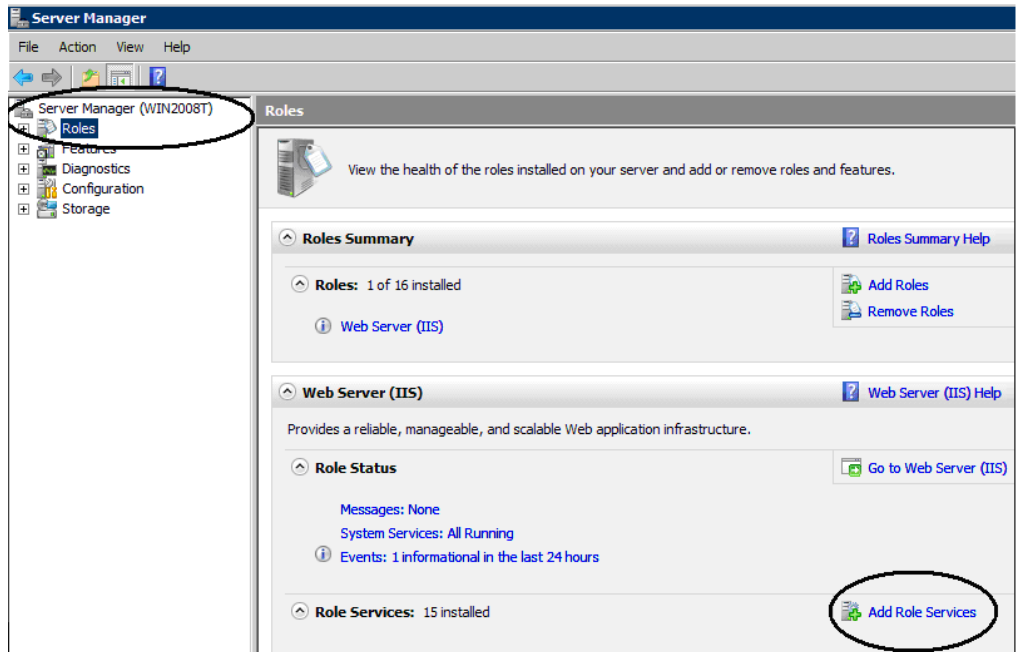
When installing the WebFOCUS Client, if you have *Configure Apache Tomcat 9.0.39 connector for IIS* selected, and you receive a message that you must configure the IIS Tomcat plug-in, finish the installation, and then run the following procedure.

### **Procedure:** How to Manually Configure Microsoft IIS Version 7.x

**Note:** The following procedure describes how to manually configure Microsoft IIS version 7.x on a Windows 2008 server. Depending on the version of Windows you use, the steps and images may vary.

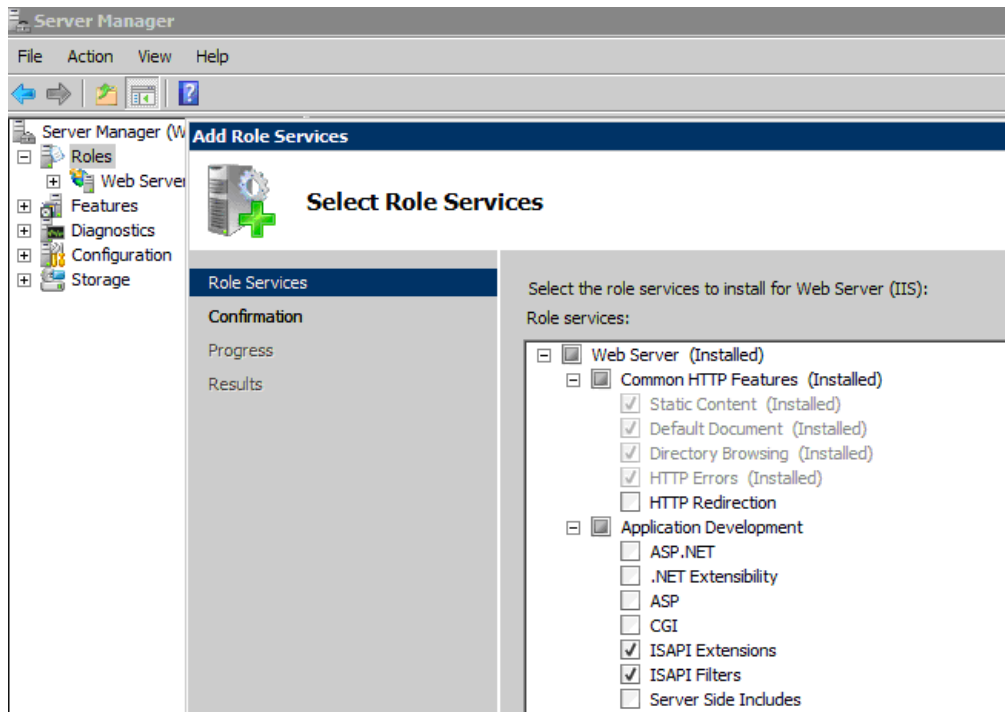
To manually configure Microsoft IIS version 7.x on a Windows server:

1. Open the Windows Server Manager on your system.
2. Select the *Roles* node in the left pane, as shown in the following image.



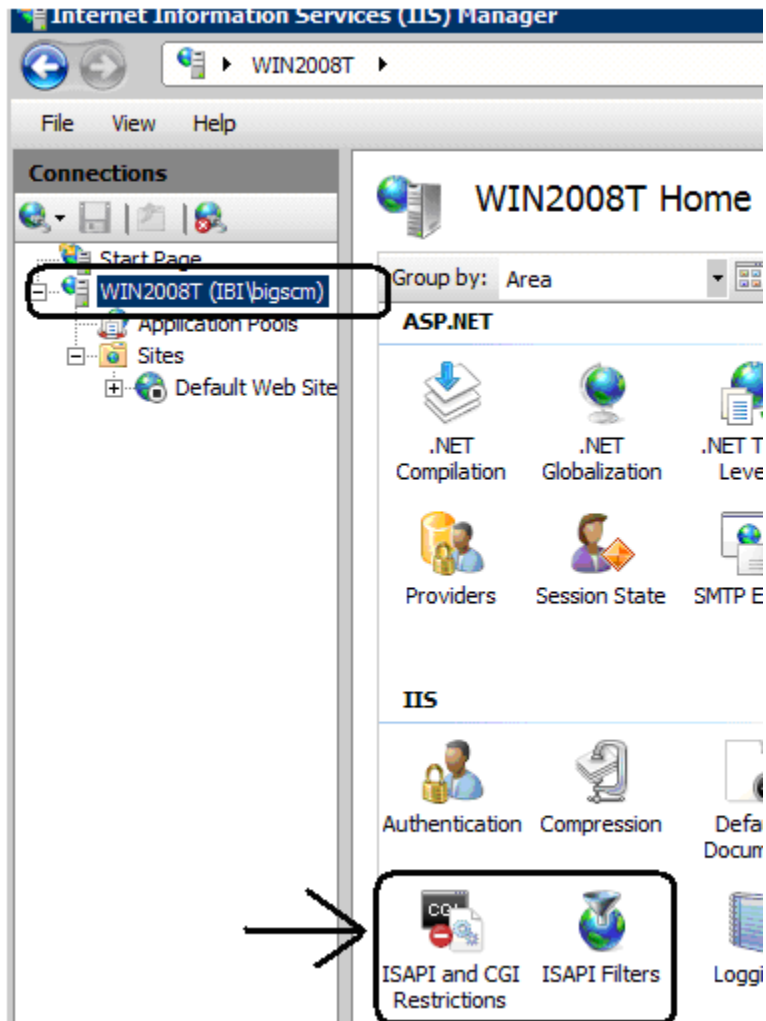
3. Click *Add Role Services* at the bottom of the Roles pane.

The Add Role Services dialog box opens, as shown in the following image.



4. Accept all of the required services that are automatically selected (ISAPI Extensions and ISAPI Filters).

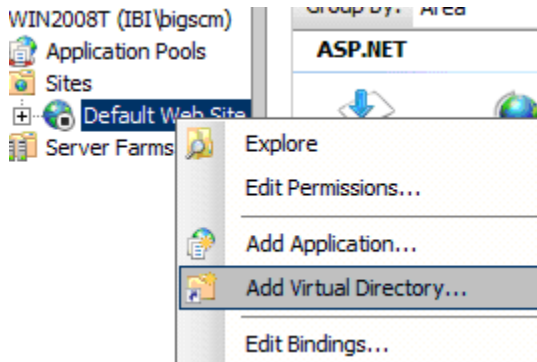
5. After the selected services are installed, open the Internet Information Services (IIS) Manager.



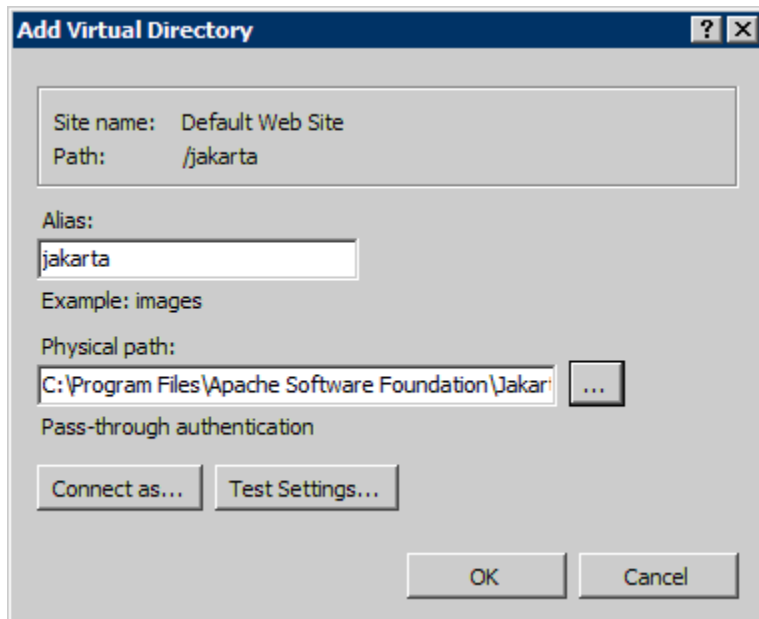
6. Ensure that the following services are available:

- ISAPI and CGI Restrictions
- ISAPI Filters

7. In the left pane, expand the *Sites* node, as shown in the following image.

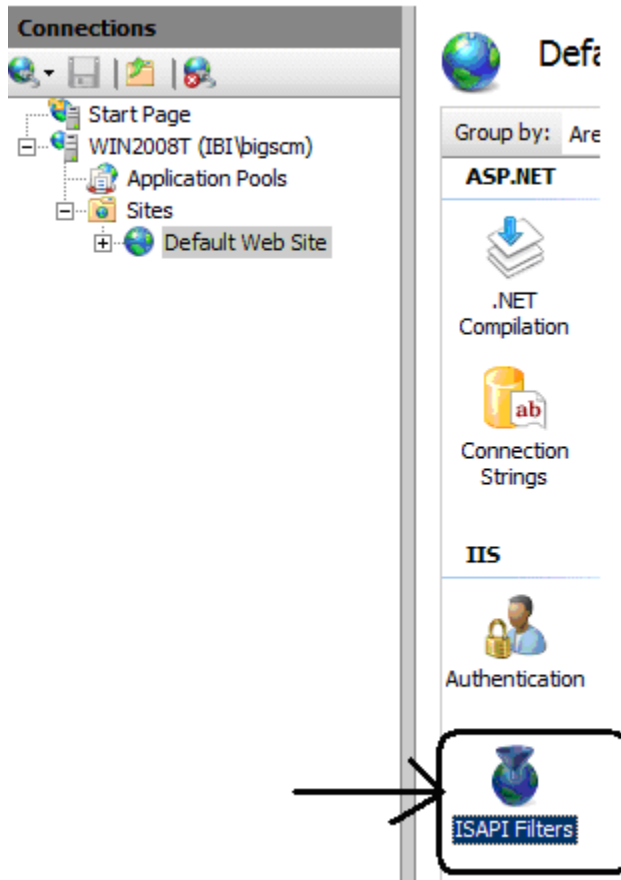


8. Right-click *Default Web Site* and select *Add Virtual Directory* from the context menu. The Add Virtual Directory dialog box opens, as shown in the following image.



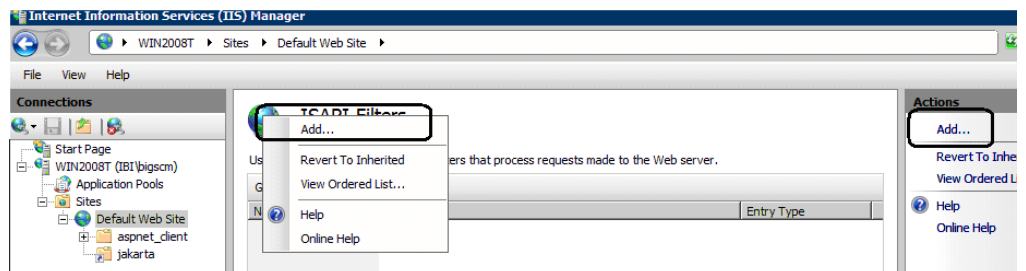
9. In the Alias field, type *jakarta*.
10. In the Physical path field, navigate to the location of the *isapi\_redirect.dll* file, which is located in the bin directory.
11. Click *OK*.

12. In the left pane, select the *Default Web Site* node, as shown in the following image.



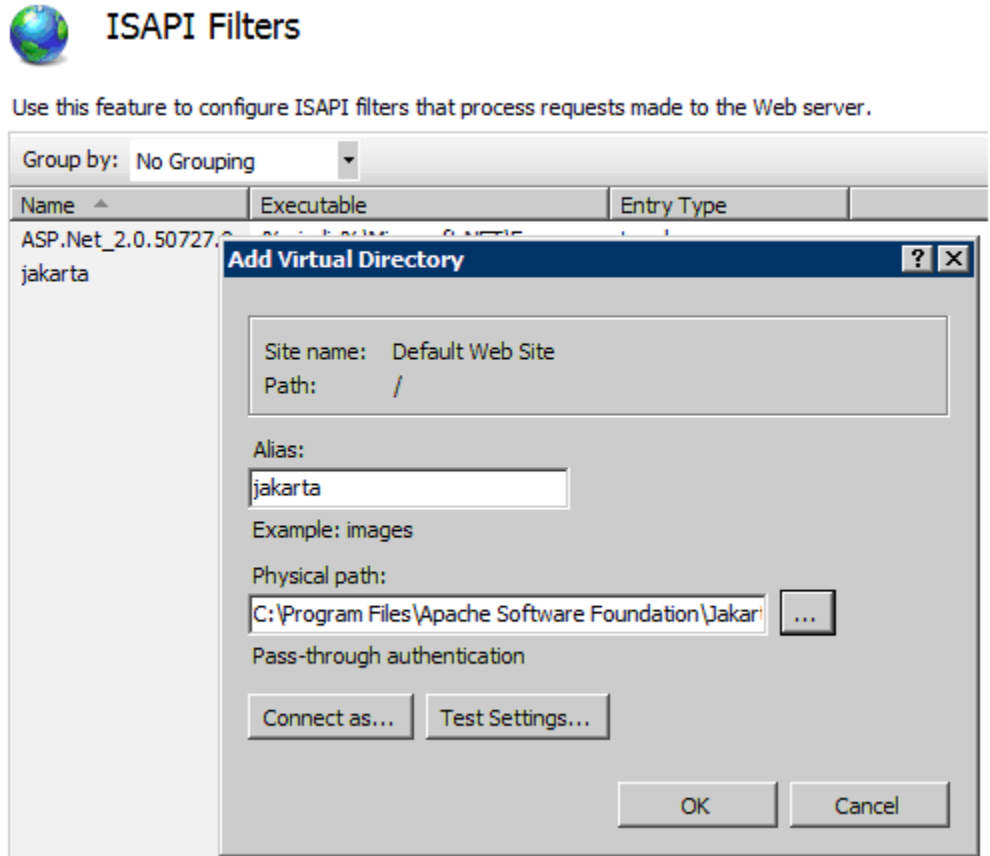
13. Double-click *ISAPI Filters*.

The ISAPI Filters pane opens, as shown in the following image.



14. Click *Add* in the right pane. You can also right-click the ISAPI Filters pane and select *Add* from the context menu.

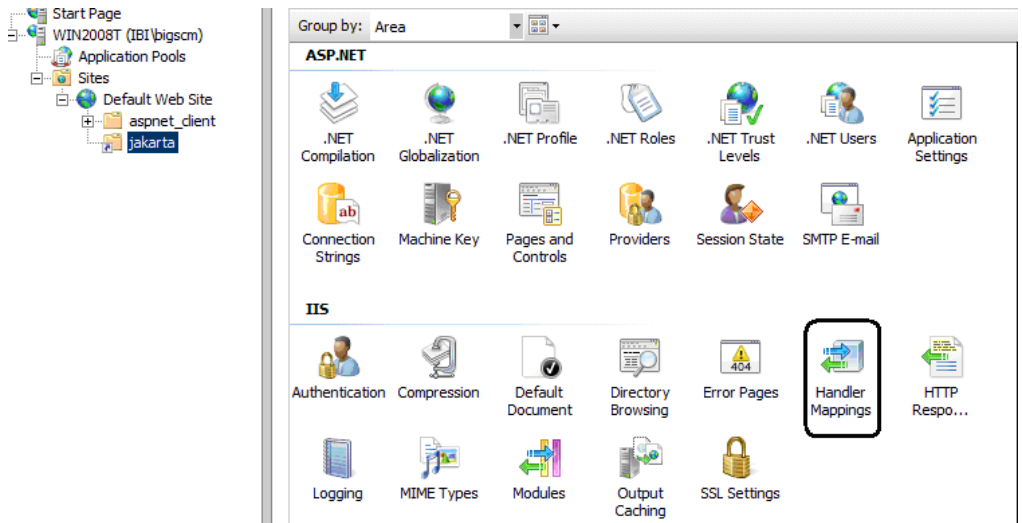
The Add Virtual Directory dialog box opens, as shown in the following image.



15. In the Alias field, type *jakarta*.
16. In the Physical path field, navigate to the location of the *isapi\_redirect.dll* file, which is located in the bin directory.
17. Click *OK*.



18. In the left pane, expand the *Default Web Site* node and select the *jakarta* node, as shown in the following image.



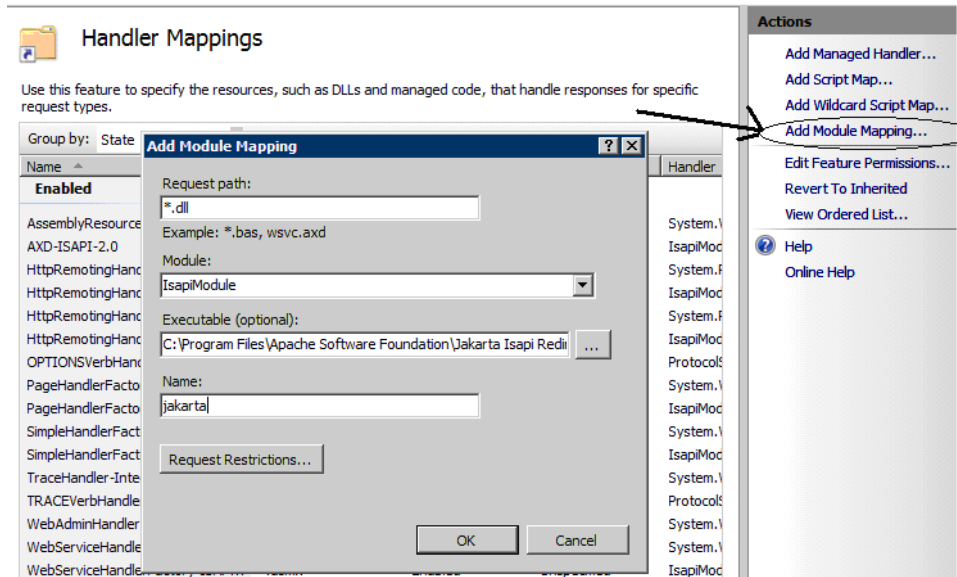
19. Double-click *Handler Mappings*.

The Handler Mappings pane opens.

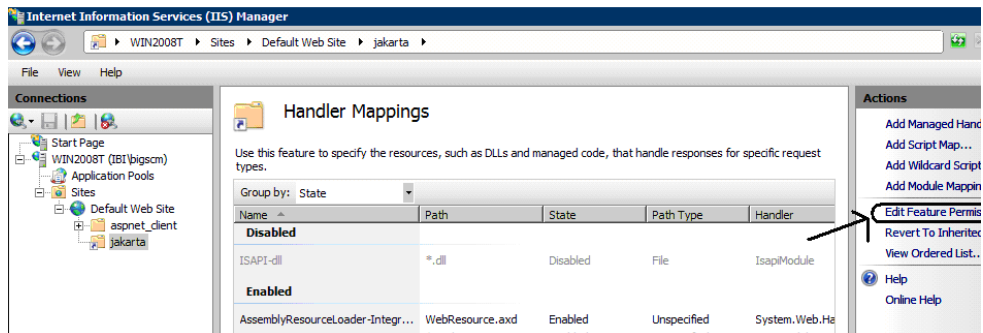
If the ISAPI module is not already available, then perform steps 20 through 28.

20. Click *Add Module Mapping* in the right pane.

The Add Module Mapping dialog box opens, as shown in the following image.

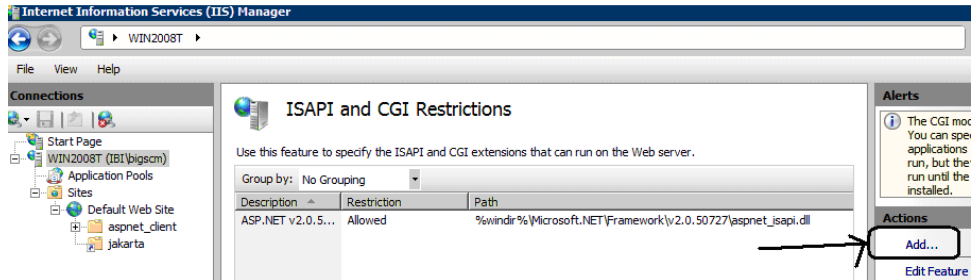


21. In the Request path field, enter *\*.dll*.
22. From the Module drop-down list, select *IsapiModule*.
23. In the Executable (optional) field, navigate to the location of the *isapi\_redirect.dll* file, which is located in the bin directory.
24. In the Name field, type *jakarta*.
25. Click *OK*.
26. Click *Edit Feature Permissions* in the right pane, as shown in the following image.

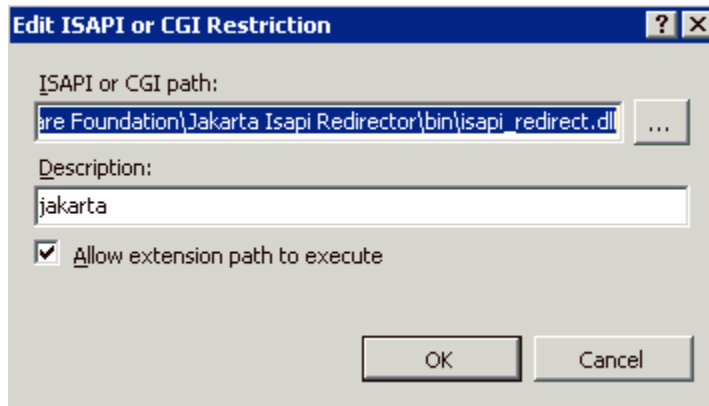


The Edit Feature Permissions dialog box opens.

27. Enable the Read, Script, and Execute permissions.
28. Click *OK*.
29. In the left pane, select the main host name node.
30. Double-click *ISAPI and CGI Restrictions* and click *Add*, as shown in the following image.



31. Add the location of the `isapi_redirect.dll` file (located in the `bin` directory) and select *Allow extension path to execute*, as shown in the following image.



32. Click *OK*.
33. Recycle Apache Tomcat and Microsoft IIS version 7.x.
34. Start Apache Tomcat and Microsoft IIS version 7.x.
35. Open the WebFOCUS Home Page in a web browser by entering the following URL:

[http://hostname:port/ibi\\_apps/](http://hostname:port/ibi_apps/)

## 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 drive:\ibi\shared
```

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

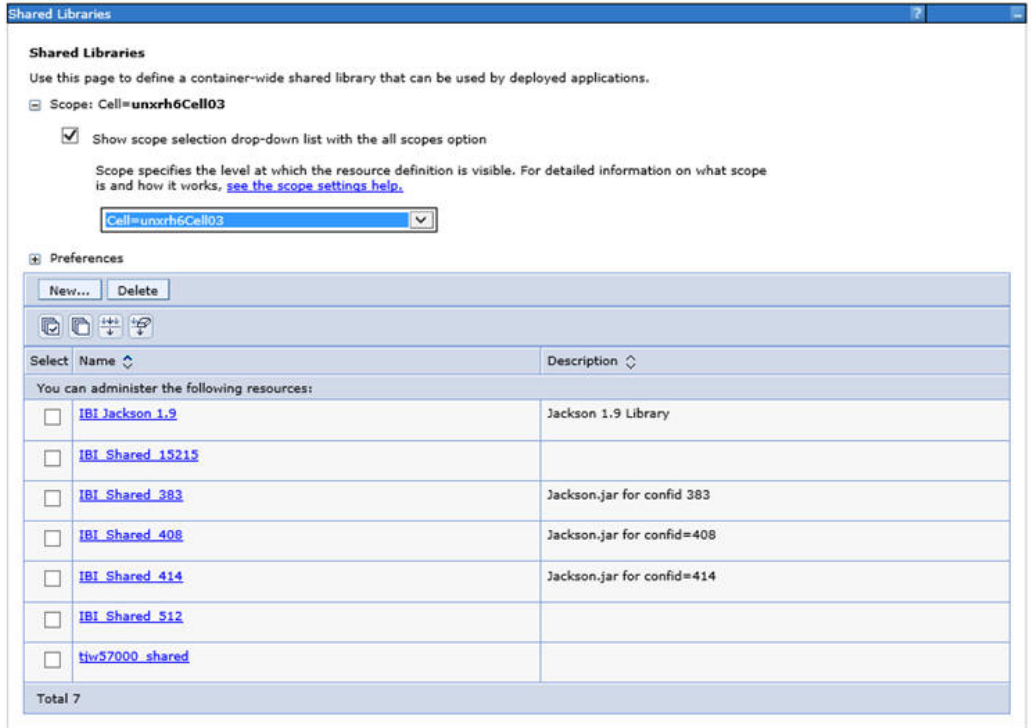
- jackson\*.jar
- http\*.jar
- org.eclipse.persistence.jpa-\*.jar
- org.eclipse.persistence.asm-\*.jar
- org.eclipse.persistenceantlr-\*.jar
- org.eclipse.persistence.jpa.jpql-\*.jar
- org.eclipse.persistence.core-\*.jar
- jakarta.persistence-\*.jar
- commons-\*.jar

For example:

```
Copy drive:\ibi\WebFOCUS82\webapps\webfocus\WEB-INF\lib\jackson*.jar drive:\ibi\shared\
```

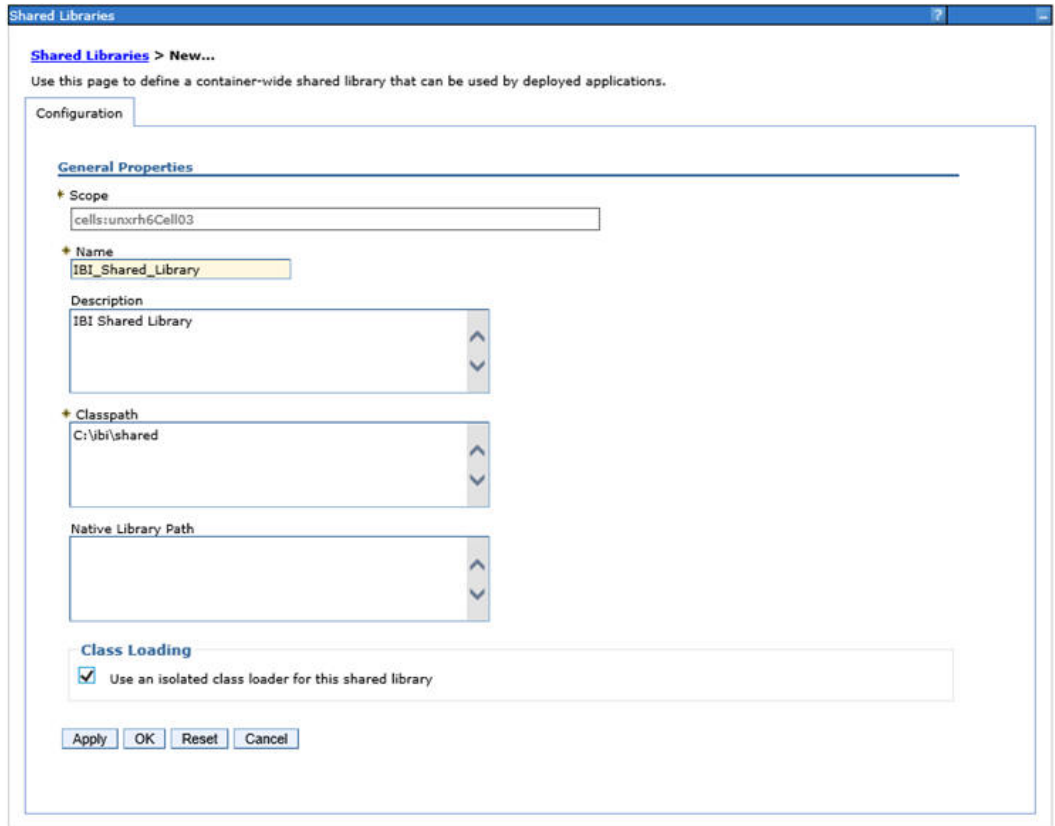
3. Sign in to the WebSphere Console.

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



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
  - Classpath: *drive:\ibi\shared*
  - Select *Use an isolated class loader for this shared library*.
7. Click *OK* and then click *Save*.

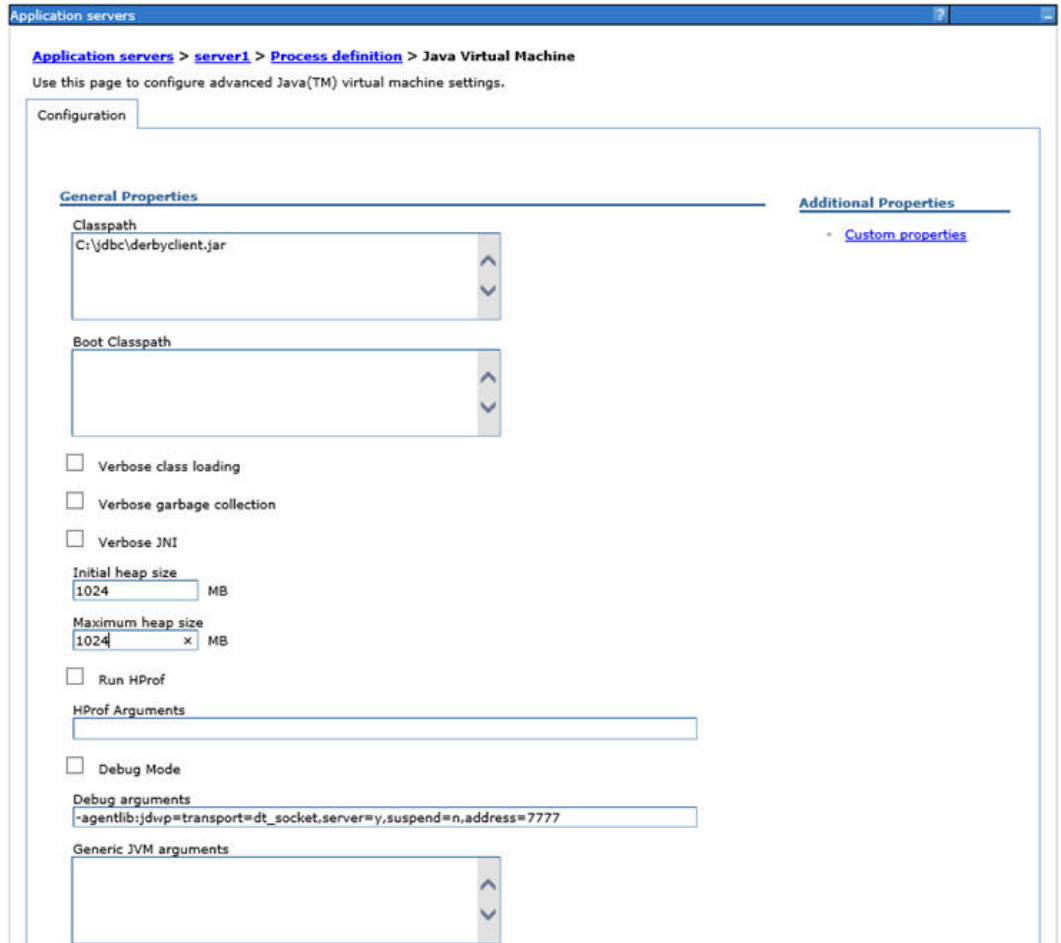
**Procedure: How to Update the WebSphere Application Server Java Settings**

The following additional settings are required by WebFOCUS.

1. Sign in to the WebSphere Console.

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

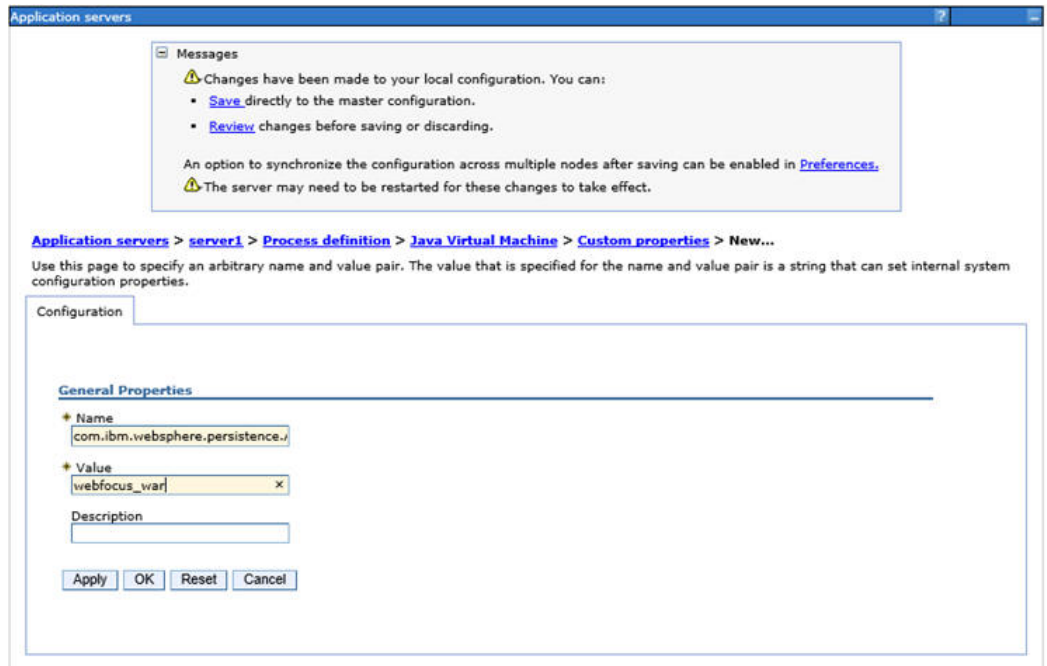
The Application servers Java Virtual Machine dialog box opens, as shown in the following image.



- 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*.

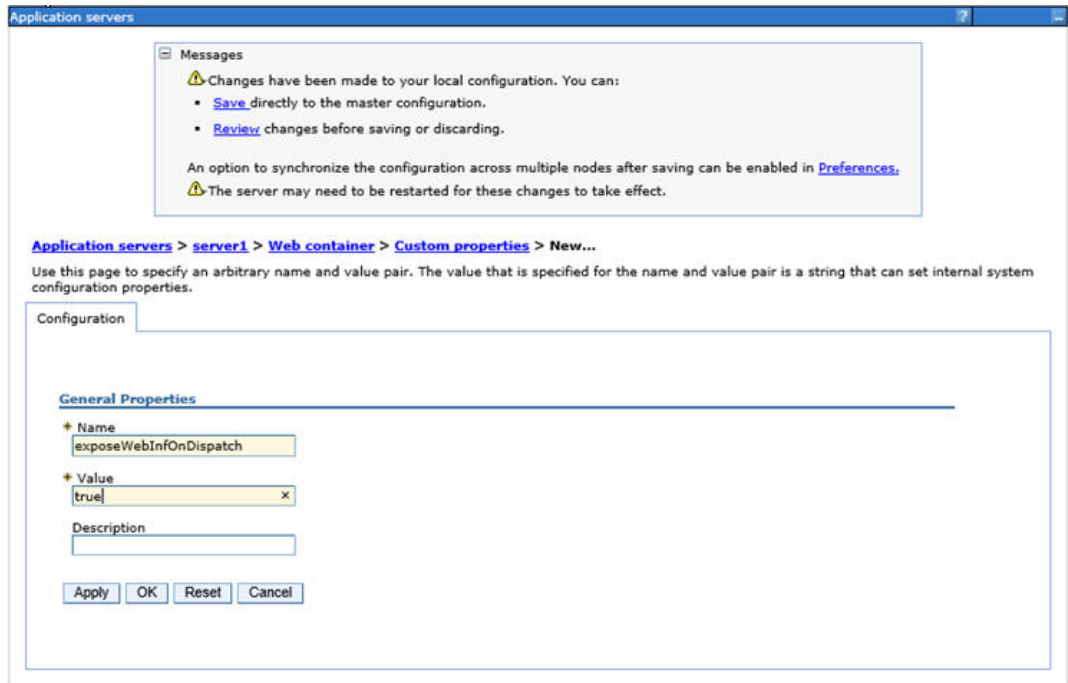
The Application servers General Properties dialog box opens, as shown in the following image.



- 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:

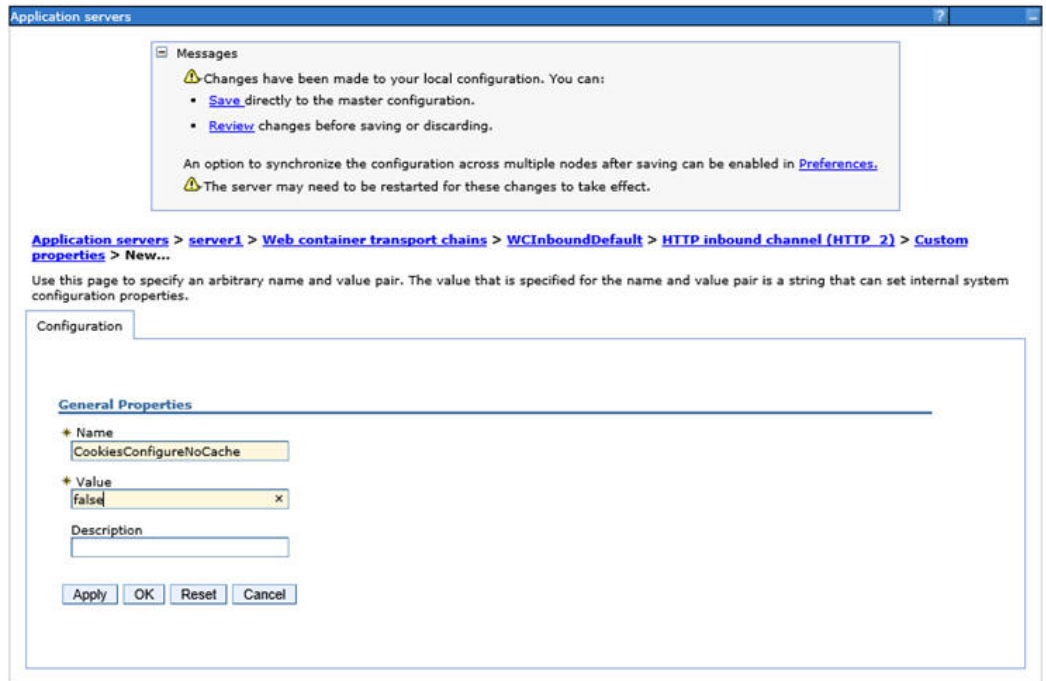
Name: exposeWebInfOnDispatch

Value: true

10. Click OK.

11. Expand Servers, Server Types, WebSphere application servers, your server, Container Settings, Web Container Settings, Web container transport chains, WCIInboundDefault, 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

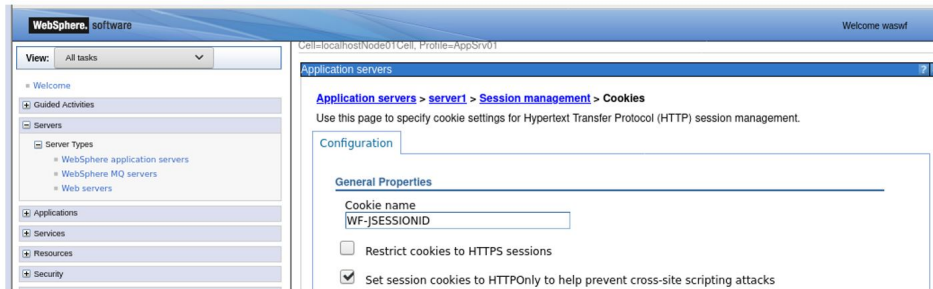
13. Click *OK* and then click *Save*.

**Procedure: How to Reassign the Default Session Cookie Value from JSESSIONID to WF-JSESSIONID**

When WebFOCUS is deployed to a WebSphere environment, the designated cookie value is JSESSIONID. In Release 8207, you need to change the cookie values to WF-JSESSIONID.

1. Sign in to the WebSphere Console.
2. In the Navigation bar, expand *Servers* and *Server Types*, and then select *WebSphere application servers*.
3. On the Application servers page, select your server.

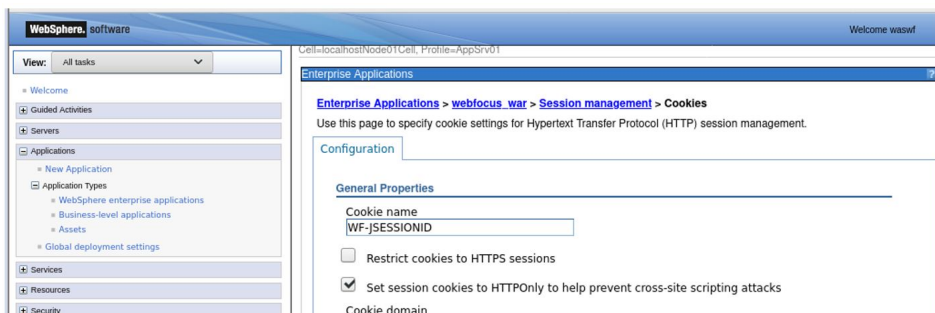
4. On the Configuration tab, under Container Settings, select the *Session management* link.
5. On the Session management Configuration tab, under General Properties, select the *Enable Cookies* link.
6. Under General Properties, change the value in the Cookie name field from JSESSIONID to WFJSESSIONID, as shown in the following image.



7. Click *OK* when your change is complete.

You will receive a message advising you that a change was made to your local configuration.

8. In the Navigation bar, expand *Applications* and *Application Types*, and then select *WebSphere enterprise applications*.
9. On the Enterprise Applications page, select *webfocus\_war* (or the name you used during deployment).
10. On the Enterprise Applications, *webfocus\_war* page, under Web Module Properties, select the *Session Management* link.
11. On the Enterprise Applications, *webfocus\_war*, Session management page, under General Properties, select the *Enable Cookies* link.
12. Under General Properties, change the value in the Cookie name field from JSESSIONID to WFJSESSIONID, as shown in the following image.



13. Click *OK* when your change is complete.
14. In the Changes have been made to your local configuration message box, select *Review* to confirm your changes before saving them to the master configuration.

Or

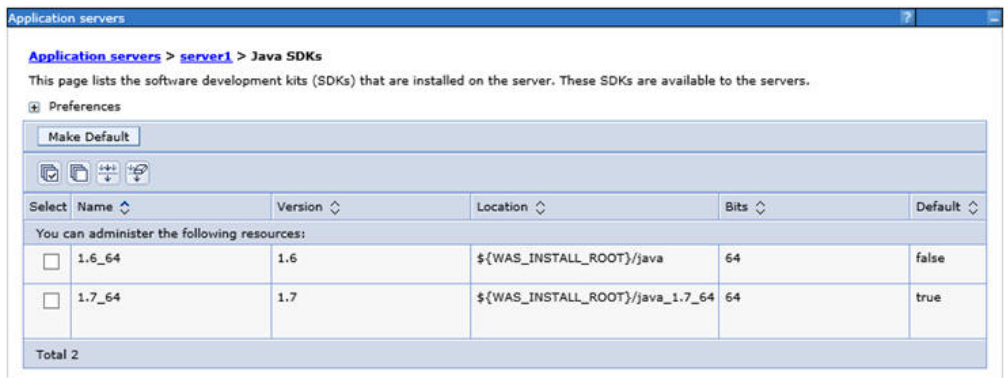
Select *Save* to save the changes directly to the master configuration.

15. In the confirmation message, click *Save* to complete the changes to the master configuration.
16. Restart your application server instance for the changes to take effect.

**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.



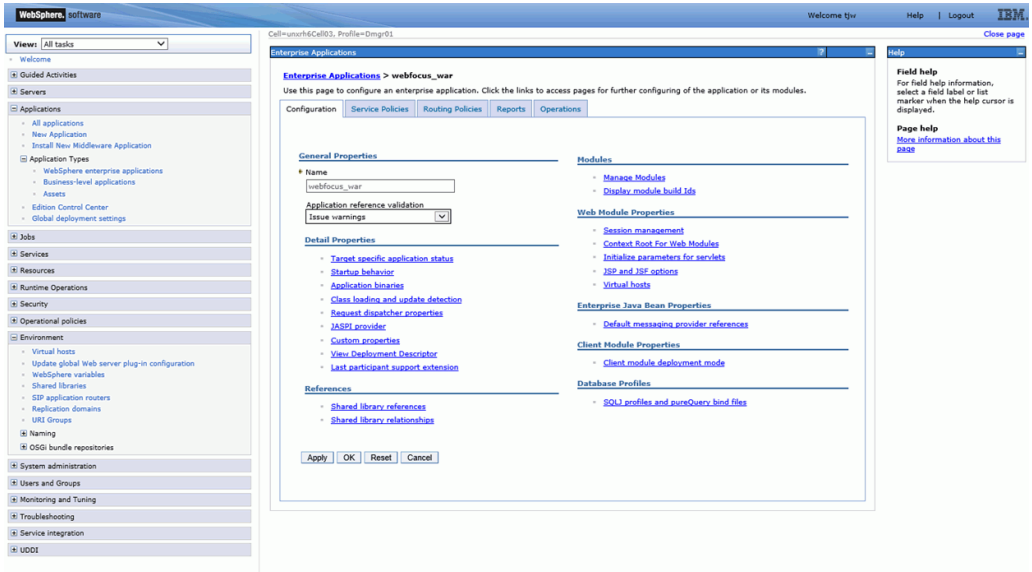
3. Verify that the Java 1.8 SDK, if present, is set to true. If not, contact your WebSphere Administrator and request your server be updated to 1.8.

**Procedure: How to Assign the IBI\_Shared\_Library to the TIBCO WebFOCUS® Web Application (webfocus.war)**

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

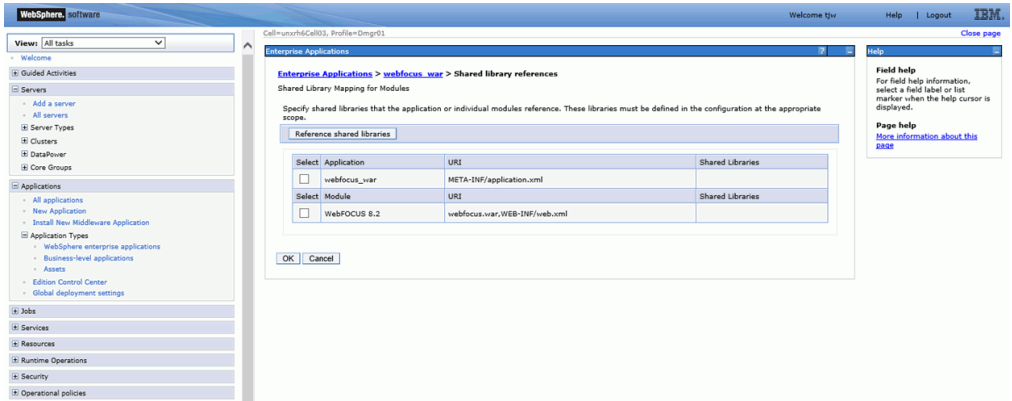
1. Sign in to the WebSphere Console.

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



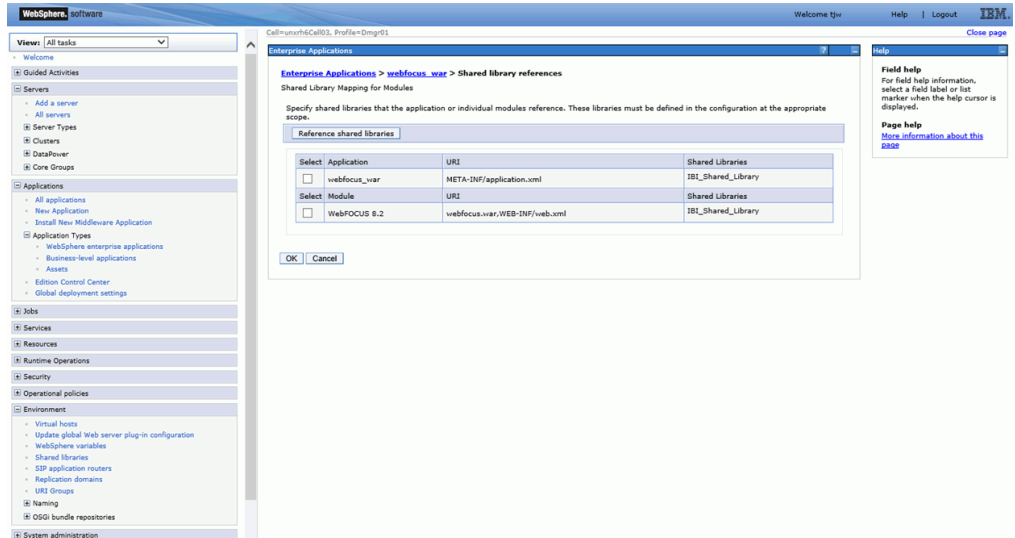
3. Select *Shared library references*.

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 8207, Java Version 8 is supported. The WebLogic server used to run the WebFOCUS Client must be configured to use a release of Java Version 8 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.
- ❑ 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 Windows system using a standalone WebLogic domain and the `startWebLogic.cmd` script to start it, you could insert the following into the `domain-directory\bin\setDomainEnv.cmd` script beginning on the second line:

```
set USER_MEM_ARGS="-Xms1024m -Xmx1024m"  
set PRE_CLASSPATH="C:\ibi\derby\lib\derbyclient.jar"  
set JAVA_OPTIONS="-Djava.io.tmpdir=C:\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.



This chapter explains how to verify that WebFOCUS and ReportCaster are installed properly. It also includes basic configuration procedures.

**In this chapter:**

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

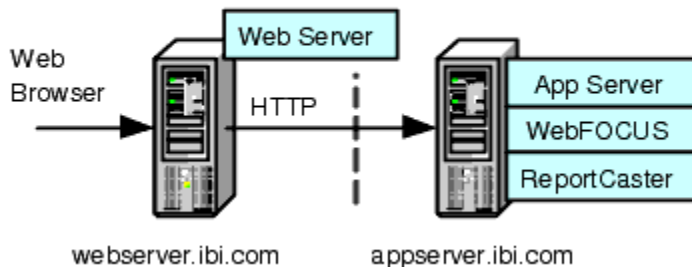
## TIBCO WebFOCUS® Client Post-Installation Tasks

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

### Configuring TIBCO 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 `drive:\ibi\apps` directory.

#### WebFOCUS In a Split Web-tier Configuration



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 *drive:\ibi\WebFOCUS82\webapps* directory, which are designed to serve static content from the file system to the browser:

- aproot.war*. Serves content from the *drive:\ibi\apps* directory.
- ibi\_html.war*. Serves content from the *drive:\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. This configuration is referred to as the Tomcat Stand-alone option and can be configured during installation on Windows.

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 *drive:/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, *drive:/ibi/WebFOCUS82/logs/wfaproot.log* and *drive:/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.2017-01-01*). You can increase the log level by editing *drive:/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"/>
```

Use a forward slash, even on Windows systems.

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"/>
```

Use a forward slash even on Windows systems.

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
```

## **TIBCO 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 *TIBCO WebFOCUS® Security and Administration* manual.

## Accessing the TIBCO 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 TIBCO WebFOCUS® Home Page

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

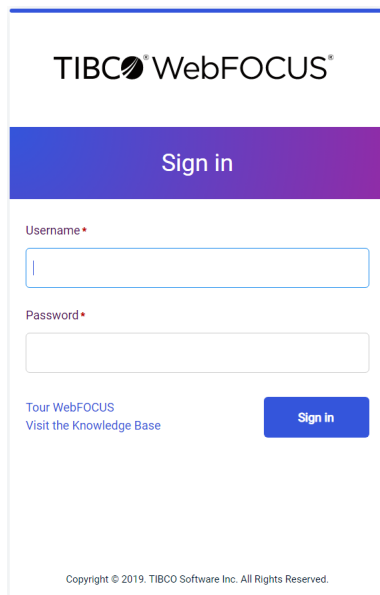
`http://hostname:port/ibi_apps/`

where:

`hostname:port`

Are the host name and HTTP port of the web server or application server. For Tomcat stand-alone configurations, the default is `hostname:8080`. If you require SSL, use `https` instead of `http`.

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



The screenshot shows the TIBCO WebFOCUS sign-in interface. At the top, the TIBCO WebFOCUS logo is displayed. Below the logo is a prominent purple button labeled "Sign in". Underneath this, there are two input fields: "Username" and "Password", each with a small red asterisk indicating a required field. Below the password field is a blue button labeled "Sign in". To the left of this button is a link that says "Tour WebFOCUS" with the subtext "Visit the Knowledge Base". At the bottom of the page, there is a small copyright notice: "Copyright © 2019. TIBCO Software Inc. All Rights Reserved."

**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 TIBCO WebFOCUS® Client](#) on page 41.

3. Enter the following default credentials:

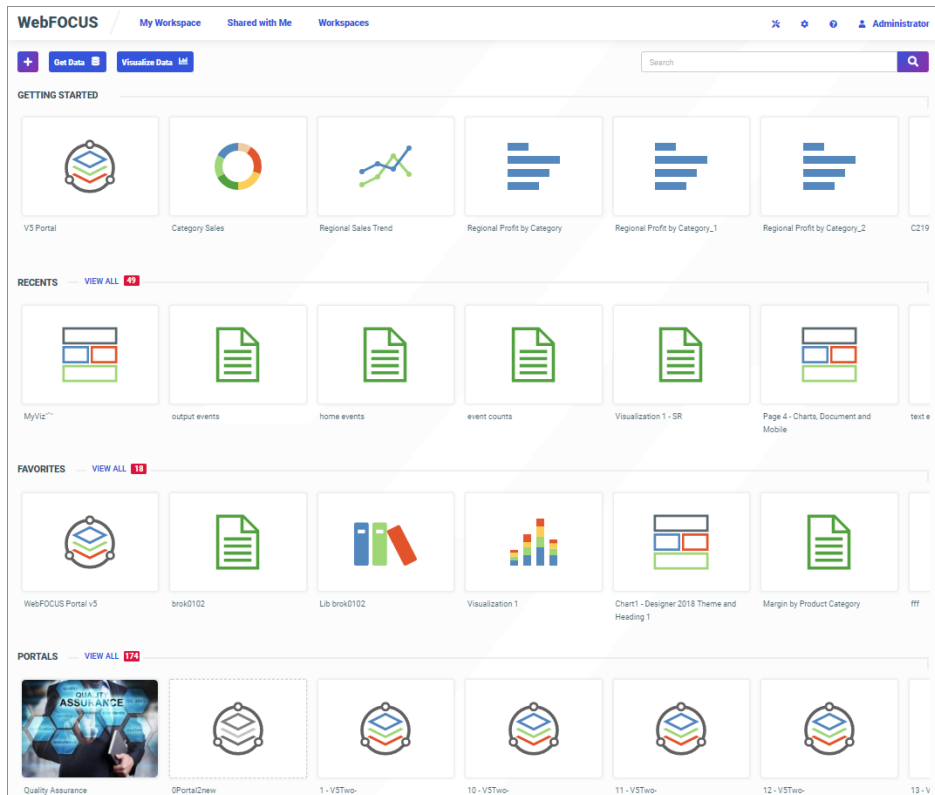
User Name: *admin*

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.



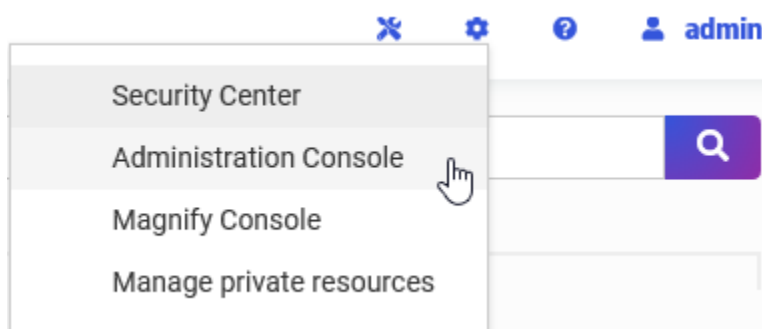
You can change the default credentials using the Security Center facility. Click the *Settings* button on the banner, and then select *Security Center*. For more information, see the *TIBCO WebFOCUS® Security and Administration* manual.

## 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 the *Settings* button on the banner, and select *Administration Console*, as shown in the following image.



If you are using Windows, you can also select *WebFOCUS Administration Console* from the WebFOCUS 82 folder, under the Information Builders app.

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

`http\(s\)://machine:port/context/admin`

where:

`machine`

Is the network ID of your computer.

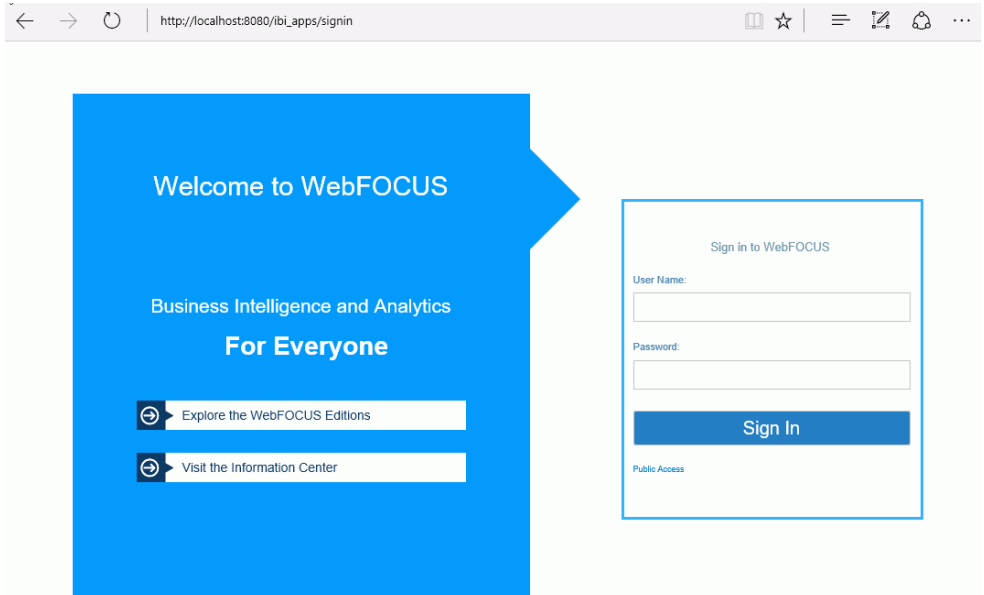
`port`

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.

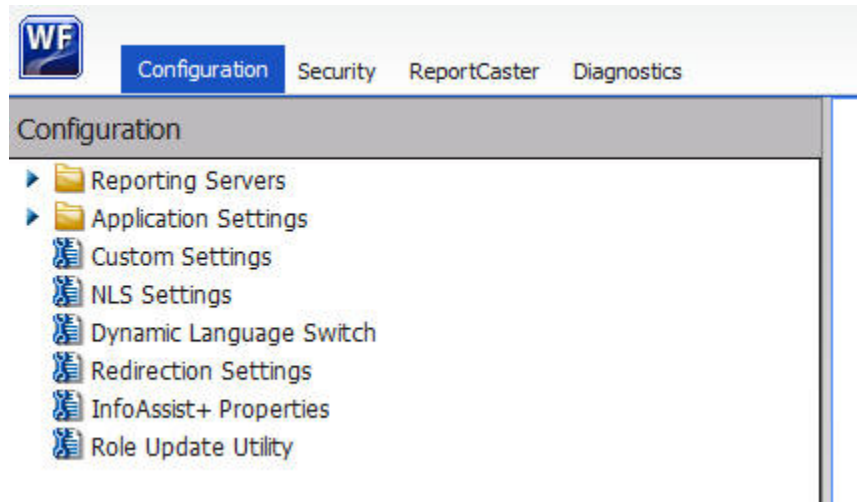


If a sign-in page does not appear, ensure that your web server and application server are started and configured.

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 *TIBCO 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 *TIBCO 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. You may have already run the verification tool if you chose the option to configure Tomcat during the WebFOCUS Client installation.

#### **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 TIBCO WebFOCUS® and ReportCaster](#) on page 147.

### 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 *TIBCO WebFOCUS® Security and Administration* manual.

## Defining Communications to WebFOCUS Reporting Servers

WebFOCUS Client communication settings are stored in the following file:

```
drive:\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:

```
drive:\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*.

### **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" />
```

## **TIBCO 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 *TIBCO WebFOCUS® Security and Administration* manual.

### **TIBCO WebFOCUS® WebFOCUS Repository Table Creation**

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.

Since the WebFOCUS Repository has been restructured as of WebFOCUS 8.2 and is different from previous WebFOCUS releases, you must create a new Repository when migrating from earlier WebFOCUS 7.7.x versions. For more information on migrating existing ReportCaster data, see the *TIBCO WebFOCUS® Migration* manual.

### **Procedure:** How to Create the Repository Tables

To create the Repository tables:

1. Navigate to the following directory:

`drive:\ibi\WebFOCUS82\utilities\WfReposUtil`

**Note:** During installation, if the Create WebFOCUS Repository check box is selected, then the installer will run the `WfReposUtilCMDLine.bat` file in `CREATE_INSERT` mode. If any errors occur during this process, you can view the `WfReposUtilCMDLine.log` file for details. If the Create WebFOCUS Repository check box is not selected during installation (in the case of an existing Repository), then you must manually run the `WfReposUtilGUI.bat` file in `DROP_CREATE_INSERT` mode. Alternatively, you can run the `WfReposUtilCMDLine.bat` file in `DROP_CREATE_INSERT` mode.

2. Run the `WfReposUtilCMDLine.bat` file by right-clicking the file and selecting the *Run as Administrator* option.

This utility creates a `.log` file with the same name in the same location after running it.

A Command Window opens, which allows you to create tables or to drop and re-create tables.

3. Enter a selection from the list of available options:

- create
- create\_or\_extend
- insert
- create\_insert
- update
- drop
- extract
- create\_ddl
- quit

4. Press Enter to continue.

A prompt for credentials displays. These are credentials for the database connection.

**Note:**

- If updates are performed, the User ID needs to have permissions to create and alter tables.
- Depending on the option selected, you may be prompted for WebFOCUS Administrator credentials.

A message appears if any errors occur during the Repository creation or re-creation process.

## 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 TIBCO WebFOCUS® and ReportCaster](#) on page 147.

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 TIBCO WebFOCUS® Client

This section describes how to test the WebFOCUS Client.

**Procedure: How to Test the TIBCO 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/](http://hostname:port/ibi_apps/)

where:

[hostname:port](http://hostname:port)

Are the host name and HTTP port of the web server or application server. For Tomcat stand-alone configurations, the default is *hostname:8080*. 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 TIBCO WebFOCUS® Client](#) on page 41.

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 [TIBCO 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 Test the TIBCO WebFOCUS® Repository Connectivity Settings**

To verify, change, or test the Repository connectivity settings:

1. Sign in to the WebFOCUS Administration Console.

2. On the Configuration tab, confirm that the Repository configuration settings are correct, as follows:
  - a. Under the Configuration tab, expand *Application Settings*, and then click *Repository*.  
The right pane displays the Repository database parameters.
  - b. Review the settings and make changes, if needed.
  - c. Click *Save*.
3. Restart ReportCaster and the Distribution Server, as follows:
  - a. On the ReportCaster tab, click *Restart*.  
A confirmation window opens.
  - b. Click *Yes*.
4. On the Server Status pane, verify that ReportCaster is running in full function mode.

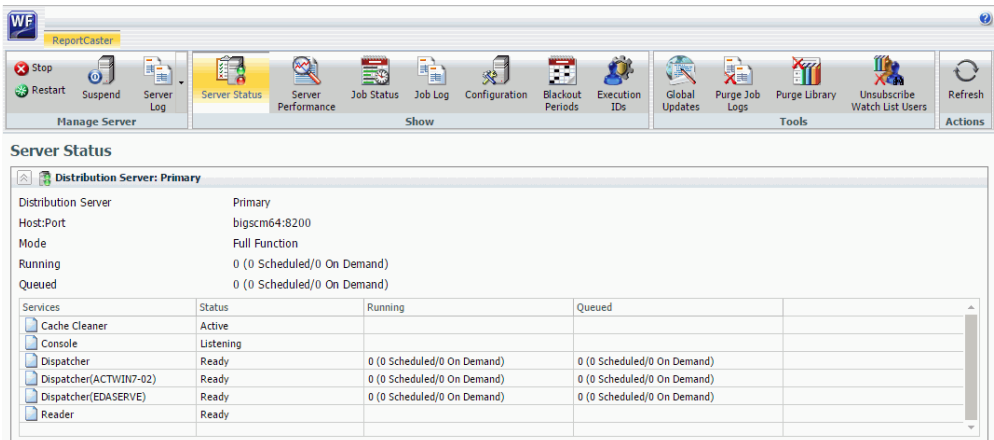
## Verifying ReportCaster

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 *TIBCO WebFOCUS® ReportCaster Guide*.

### 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
```

In addition:

- If the Distribution Server is running on Windows from the command line, then edit the `schbkr` file located in the ReportCaster bin directory.
- If the Distribution Server is running as a Windows service, then use the Registry Editor to change the value of the `JvmMs` and `JvmMx` registry keys.

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` bat or script file and add `-Dfile.encoding=UTF8` to the Java command. If the Distribution Server is being run as a Windows Service, modify the Windows registry by accessing

`HKEY_LOCAL_MACHINE\SOFTWARE\InformationBuilders\ReportCaster\WFXXXX\Parameters\Java`

and adding the following to the Options string:

`-Dfile.encoding=UTF8`

where:

`WFXXXX`

Is the release number in which you are working.

## Important Configuration Considerations When the Distribution Server is Installed Separately From the TIBCO 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 ...\\jbi\\WebFOCUS82\\config directory to the ...\\jbi\\WebFOCUS82\\config directory on the stand-alone Distribution Server machine.
2. Copy the odin.cfg file from the ...\\jbi\\WebFOCUS82\\client\\wfc\\etc directory to the ...\\jbi\\WebFOCUS82\\client\\wfc\\etc directory on the stand-alone Distribution Server machine.
3. Copy the cgivars1.wfs file from the ...\\jbi\\WebFOCUS82\\client\\wfc\\etc directory to the ...\\jbi\\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 *TIBCO WebFOCUS® ReportCaster Guide*.

## 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 *drive:\\jbi\\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>

## Using the ReportCaster SFTP Key Generation Utility

ReportCaster includes a configuration utility for SFTP public and private keys.

### **Procedure:** How to Use the ReportCaster SFTP Key Generation Utility

1. Navigate to the `drive:\ibi\WebFOCUS82\ReportCaster\bin` directory and double-click `sshkeygen.bat`.

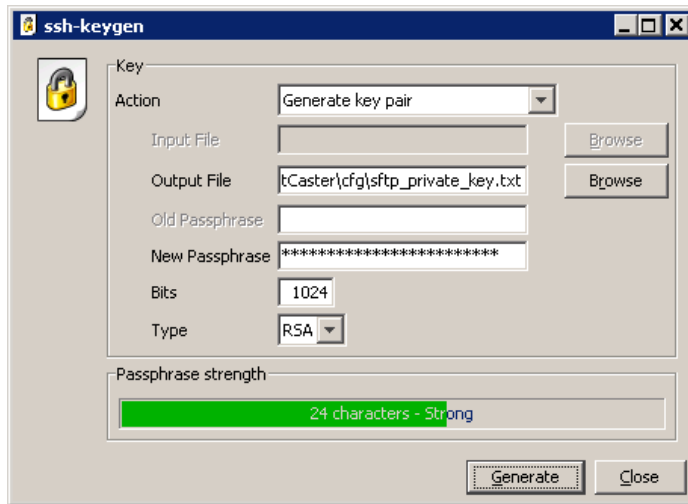
The `ssh-keygen` dialog box opens.

2. Set the output file to `ibi\WebFOCUS82\ReportCaster\cfg\sftp_private_key.txt`.
3. Enter a passphrase in the New Passphrase field.

The Passphrase strength field indicates the strength of the password entered.

4. Select the type of key.

The following image displays an example of a dialog box with all necessary changes made.



5. Click `Generate`.

WebFOCUS writes two files to the `drive:\ibi\WebFOCUS82\ReportCaster\cfg` directory. These are `sftp_private_key.txt` and `sftp_private_key.txt.pub`. The file `sftp_private_key.txt.pub` contains the public key.

6. Install the public key (`sftp_private_key.txt.pub`) on your SFTP server.

## 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 TIBCO WebFOCUS® and ReportCaster](#) on page 147.

### 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 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 InfoAssist can develop an impressive portal without any knowledge of web design. For more information on BI Portal, see the *TIBCO WebFOCUS® User's Guide*.

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

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. For Tomcat stand-alone configurations, the default port is 8080. 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 *TIBCO 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 135.
  - 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.



This chapter contains information for tracking errors and debugging problems.

Since much 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 83. You should also be aware of the trace files generated by the installation.

If you encounter any problems with ReportCaster, review [ReportCaster Troubleshooting Tips](#) on page 156 to determine if your system is configured properly.

**In this chapter:**

- [TIBCO WebFOCUS<sup>®</sup> Troubleshooting Tips](#)
  - [ReportCaster Troubleshooting Tips](#)
- 

## TIBCO WebFOCUS<sup>®</sup> Troubleshooting Tips

Troubleshooting WebFOCUS considers 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
- WebFOCUS Reporting Server

## 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 that all components are started and are listening on their expected ports. The WebFOCUS web application may take some time to load.
3. Ensure that you typed in 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:

```
drive:\ibi\srv82\wfs\etc\edasprof.prf
```

If you receive a *Resource not found* message, then this may be the problem.

6. During testing, be sure to call pages using HTTP or HTTPS requests and not by selecting *Open* from the File menu in the web browser.
7. Turn on tracing through the WebFOCUS Administration Console.
8. 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 root that you deployed (for example, /ibi\_apps), which is located in the following directory:

```
< catalina_home > \work\Catalina\localhost
```

**Note:** If installed by WebFOCUS Client, Tomcat will be installed in the root directory of the WebFOCUS installation which, by default, is c:\ibi\tomcat.

9. In the WebFOCUS Administration Console, select the *Diagnostics* tab and use the available options to troubleshoot.
10. Restart all components, especially your web or application servers.

## HTTP 500 Internal Server Message

If you receive an HTTP 500 server message on the Configuration Verification Utility page after installation, clear your browser cache and access the Diagnostics page again from either the Program Menu option or by copying the URL into another browser window. This may occur on a full installation or on an upgrade.

## 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 TIBCO WebFOCUS® App Studio. For additional information, see *Web Browser Support for WebFOCUS*, which can be accessed by clicking on the following URL:

<https://kb.informationbuilders.com/topic/webfocus-8207-browser-information>

**Note:** Some browsers may function differently depending on the operating system. See the *TIBCO 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 8207, 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 that your web and application servers are configured, as explained in [Configuring Web and Application Servers](#) on page 83.

WebFOCUS relies on processing by the Java VM, web server, and application server. 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.

For Apache Tomcat, review the log information generated in the following directory:

`C:\ibi\tomcat\logs`

**Note:** You can safely ignore the following error:

```
org.apache.catalina.core.AprLifecycleListener lifecycleEvent - INFO:  
The Apache Tomcat Native library which allows optimal performance in  
production environments was not found on the java.library.path.
```

## Java Memory Issues

Depending on your application server default settings, you may need to adjust the Java VM memory options if you run into performance issues. If the WebFOCUS installation configured Tomcat for you, this is done automatically.

The most common Java VM options you need to set 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.

The following are the most common Java VM options related to memory settings. Replace the ##### with the size you wish to set:

`-Xmx#####M`

Sets the maximum Java heap size. It is common to make this 1/4 of the system RAM, but it must be at least 1536 MB (1.5 GB).

`-Xms#####M`

Sets the initial Java heap size. It is common to make this 1/8 of the system RAM, but it must be at least 1536 MB (1.5 GB).

`-Xss#####M`

Sets the Java thread stack size. You do not need to set this unless you are fine tuning your environment.

The size is normally set in Megabytes. For example:

```
-Xms1536M  
-Xmx2048M
```

To view your current Java VM memory settings, access the WebFOCUS Administration Console. Select the *Diagnostics* tab and 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	*	937,518	~	1,099,776	1,781,760	1,955,328	~
	PS Eden Space	323,478	642,048	275,456	329,728	334,848	n/a
	PS Survivor Space	140,853	197,827	45,568	194,560	194,560	n/a
	PS Old Gen	473,186	554,848	733,184	1,257,472	1,466,368	0
Non-Heap	*	309,002	~	2,496	320,640	0	~
	Code Cache	134,197	134,305	2,496	135,360	245,760	0
	Metaspace	158,589	158,589	0	167,744	0	0
	Compressed Class Space	16,214	16,214	0	17,536	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

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.

- For Tomcat, these are set automatically if the WebFOCUS installation configured Tomcat.
- For other application servers, refer to your application server documentation.

## Graphics Issues

You can test basic graph functionality by running the sample `cargraph.fex` procedure installed with the WebFOCUS Reporting Server:

[http://hostname:port/ibi\\_apps/WFServlet?IBIF\\_ex=cargraph&FORMAT=PNG](http://hostname:port/ibi_apps/WFServlet?IBIF_ex=cargraph&FORMAT=PNG)

If you cannot generate graphics or want to improve performance, try adding the following Java option to your application server Java VM settings:

```
-Dsun.java2d.noddraw
```

For Tomcat, this is in the Apache Tomcat Properties windows on the Java tab, in the Java Options field.

If you cannot run a graph request, you may also need to set NTFS permission to allow your application server full permissions to the temporary directory used by the Java VM. This directory is the `java.io.tmpdir` parameter that appears in the WebFOCUS Administration Console when you select the *Diagnostics* tab and select *JVM Property Info*.

## TIBCO WebFOCUS® Web Server Host Name and Port Settings

During the WebFOCUS Client installation, you are asked for the host name and HTTP port of your web server. This should be the host name and port that your end users use to access WebFOCUS and ReportCaster. These values are used for communications between ReportCaster and Report Library. If you use Report Library, ensure this is set to the end user accessible web server host name and port, even if it is not on the same machine as WebFOCUS and only forwards requests through a firewall.

If you need to change the web server host name and port that you entered during the installation:

1. If you use ReportCaster, correct the host name and port number stored in the ReportCaster configuration for the Report Library. To do this, access the ReportCaster Console, which can be accessed from the WebFOCUS Home Page. After you sign in to the WebFOCUS Home Page, click *Tools* from the top menu and select *ReportCaster Status*.

The ReportCaster Console opens in a new browser window.

2. Click the *Configuration* tab.
3. Click *Report Library* in the left pane and change the host name and port in the *Default Library URL for Email Notification* field.
4. Click the *Save* icon, followed by *Restart* to restart all WebFOCUS components.
5. Optionally, update the shortcuts that appear in the Start menu for accessing WebFOCUS pages. To do this, right-click each of the following, select *Properties*, and adjust the host name and port that appear in the URL:

`drive:\ibi\WebFOCUS82\utilities\showconsole`

`drive:\ibi\WebFOCUS82\utilities\ReportCasterMain`

`drive:\ibi\WebFOCUS82\utilities\ReportCasterConsole`

For example:

`http://hostname.domain.com:8080/ibi_html/wfconsole.htm`

If you are not using ReportCaster, the ReportCaster links do not appear.

## Using the jar Utility

A jar.exe 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 file contents.



**Note:** The default WebFOCUS Apache Tomcat configuration does not use the WAR file, so this utility is normally not needed with Tomcat.

**Procedure: How to Ensure You Can Use the jar Utility**

To use the jar command, ensure that the `JAVA_HOME\bin` directory is in your search PATH. For example:

```
C:\Program Files\AdoptOpenJDK\jdk-11.0.9.11-hotspot\bin
```

To add this to your search PATH:

1. Go to the Windows Control Panel and open the *System* folder.
2. Click *Advanced system settings* and then click the *Environment Variables* button.
3. In the bottom System variables frame, select *Path*.
4. Click *Edit*.
5. At the end of the line, add a semicolon (;) and the path to the `JAVA_HOME\bin` directory. For example:

```
C:\Program Files\AdoptOpenJDK\jdk-11.0.9.11-hotspot\bin
```

6. Click *OK* to close out.

**Procedure: How to Edit the TIBCO WebFOCUS® Web Application**

The WebFOCUS web application is provided as both an expanded directory and a WAR file:

```
drive:\ibi\WebFOCUS82\webapps\webfocus
```

```
drive:\ibi\WebFOCUS82\webapps\webfocus.war
```

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 backup 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. Open a Command Prompt.
5. Navigate to the webfocus directory. For example:

```
drive:\ibi\WebFOCUS82\webapps\webfocus
```

6. Use the jar command to create a new webfocus.war file that contains the contents of the webfocus directory and subdirectories. 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 "../".

7. Redeploy the WebFOCUS web application to your application server.

### **Procedure: How to Execute the jar Utility**

The options for using the jar commands are useful to know. You execute the jar utility from the Command Prompt.

- To create a new jar file:

```
jar cvf FileToCreate.war FileToAdd1 FileToAdd2
```

You can add all files and subdirectories using an asterisk (\*).

```
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
```

### **TIBCO WebFOCUS® File Extensions**

WebFOCUS files have several non-standard file extensions on Windows, such as .mas, .prf, .acx, .wfs, .cfg, and .xmls files. Depending on the software installed on your machine, these file extensions may already be in use for other applications. Normally, this causes no conflicts when using either WebFOCUS or the other applications. However, should you attempt to open a WebFOCUS file that is mapped for another application by double-clicking it in File Explorer, problems can arise.

**Note:** By default, you might not see file extensions in File Explorer. To see extensions, open File Explorer. On the View tab, enable *View file name extensions*.

Specific instances where WebFOCUS extensions may conflict are the following:

- ❑ PRF files, such as `drive:\ibi\svr82\wfs\etc\edasprof.prf`

PRF files are normally mapped to Microsoft Outlook Profile settings. On some Windows releases, opening `edasprof.prf` by double-clicking it in File Explorer, can cause damage to your Microsoft Outlook settings. Therefore, if you need to edit this file, open it from within a text editor.

- ❑ MAS files, such as `drive:\ibi\apps\ibisamp\car.mas`

MAS files may be mapped as Microsoft Access files if you have Microsoft Access installed.

## Missing Tomcat Context Definition Files

**Symptom:** The context definition files for Tomcat are being deleted periodically.

The following files will be deleted randomly:

```
< catalina_home > \ conf \ Catalina \ localhost \ ibi_apps . xml
```

```
< catalina_home > \ conf \ Catalina \ localhost \ ibi_html . xml
```

```
< catalina_home > \ conf \ Catalina \ localhost \ approot . xml
```

**Problem:** This is a problem with Tomcat in certain environments. The exact cause of the issue is unknown.

**Solution:** Within the Tomcat configuration (`server.xml`), turn off `autoDeploy`.

1. Edit your Tomcat `server.xml`.

On Windows, this is typically found at:

```
< catalina_home > \ conf \ server . xml
```

or, if the WebFOCUS Client installation installed Tomcat, it is located under

```
< catalina_home > \ conf \ server . xml
```

2. Find the following section within your `server.xml`:

```
< Host name = " localhost " appBase = " webapps "
  unpackWARs = " true "  autoDeploy = " true "
  xmlValidation = " false " xmlNamespaceAware = " false " >
```

and change autoDeploy to false:

```
<Host name="localhost" appBase="webapps/localhost"  
unpackWARs="true" autoDeploy="false"  
xmlValidation="false" xmlNamespaceAware="false">
```

3. Restart Tomcat.

## ReportCaster Troubleshooting Tips

ReportCaster relies on communications between the following components:

- Web browser (for user interfaces)
- Application server
- Java VM
- ReportCaster web components
- ReportCaster Distribution Server
- Database server where WebFOCUS Repository tables are located
- 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. The ReportCaster Distribution Server will not start if it cannot connect to the repository. All components are related, so what appears to be a problem in one component may be caused by a different component. If possible, restart components and reboot, especially after making changes.

All components can run on one machine, or they 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.

**Note:**

- ❑ All WebFOCUS and ReportCaster components must be the same release number.
- ❑ If the Distribution Server is not started, you can edit the ReportCaster Server Configuration interface from the WebFOCUS BI Portal. After you sign in to the WF BI Portal, click *Tools* from the top menu bar and select *ReportCaster Status*. The ReportCaster Console opens in a new browser window. Click the *Configuration* tab, which contains the ReportCaster configuration settings.

**Troubleshooting Web and Application Server Errors**

Review the installation and configuration instructions in [Installing the TIBCO WebFOCUS® Client](#) on page 41 and [Configuring Web and Application Servers](#) on page 83.

- ❑ Ensure the web server and application server are running.
- ❑ If your repository requires JDBC drivers, ensure they are in your application server CLASSPATH. The path up to and including any file names must be specified. Specifying a directory containing a driver file is not sufficient. Be sure to restart your application server after changing CLASSPATH.

For Tomcat, you can set CLASSPATH from the Start menu by selecting *Tomcat Configuration Utility*, under the Information Builders app.

**Troubleshooting Java Errors**

If the Distribution Server fails to start, or starts as a non-Windows service but fails to start as a Windows service, check your Java configuration.

- ❑ Confirm that Java executes by checking the version at a command prompt. Open a Command Window and type:

```
java -version
```

Something similar to the following should appear:

```
java version "OpenJDK 11 JRE version 11.0.9"
```

If you receive an error, ensure the Java JDK is properly installed.

## Troubleshooting ReportCaster Distribution Server Errors

Review the installation and configuration instructions in [Installing the TIBCO WebFOCUS® Client](#) on page 41 and [ReportCaster Post-Installation Tasks](#) on page 133.

- ❑ Ensure the ReportCaster Distribution Server is running.
- ❑ Ensure that the ReportCaster web application knows where the Distribution Server is. Edit the `dserver.xml` file, which is located in the following directory:

```
drive:\ibi\WebFOCUS82\utilities\WFReposUtil\xml
```

Locate the `<host_name>` and `<port>` elements in the `dserver.xml` file. For example:

```
<host_name>hostname1</host_name>  
<port>8200</port>
```

If the values within these elements are incorrect, correct them. Specify the host name and TCP port for the Distribution Server according to your configuration.

After you save the `dserver.xml` file, you must reload the repository tables and restart Tomcat or the application server where WebFOCUS is deployed.

- ❑ Check the Java configuration, as explained in [Troubleshooting Java Errors](#) on page 157. If ReportCaster starts as a non-Windows service but does not start as a Windows service, the Java installation is a likely cause.
- ❑ Check settings using the ReportCaster Console, which can be accessed from the WebFOCUS Home Page. After you sign in to the WebFOCUS Home Page, click *Tools* from the top menu and select *ReportCaster Status*. The ReportCaster Console opens in a new browser window. Click the *Configuration* tab, which contains the ReportCaster configuration settings.

## Troubleshooting Repository Errors

Review the installation and configuration instructions in [Installing the TIBCO WebFOCUS® Client](#) on page 41, [TIBCO WebFOCUS® Repository Post-Installation Tasks](#) on page 130, and [Additional TIBCO WebFOCUS® Repository Topics and Tasks](#) on page 177.

- ❑ Ensure the database server is running.
- ❑ Ensure the repository tables exist.
- ❑ Ensure that the Distribution Server machine contains the correct information to connect to the database. For more information on these parameters, see [Repository Connection Information](#) on page 180.

- ❑ Ensure the correct JDBC driver is installed on the web server and ReportCaster Distribution Server machines.
- ❑ Ensure that your application server or servlet container 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:

```
drive:\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 utility to insert the driver files or create a new web application, as explained in [Using the jar Utility](#) on page 152. Then redeploy the WAR file.

- ❑ Ensure the Distribution Server has the correct CLASSPATH to the JDBC driver. This is set in a file:

```
drive:\ibi\WebFOCUS82\ReportCaster\bin\classpath.bat
```

and in the registry:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Information Builders\ReportCaster\WF82\Parameters\Java\Classpath
```

- ❑ For SQL Server, ensure SQL Server authentication is supported, as explained in [SQL Server Pre-Installation Steps](#) on page 190.

## Troubleshooting Reporting or Delivery Errors

Review the WebFOCUS and ReportCaster documentation and review 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.
- ❑ Check the files in the logs directory:

```
drive:\ibi\WebFOCUS82\ReportCaster\log
```

## Turning Distribution Server Traces ON/OFF

Normally, you should turn the Distribution Server traces on and off using the ReportCaster Console, which can be accessed from the WebFOCUS Home Page. After you sign in to the WebFOCUS Home Page, click *Tools* from the top menu and select *ReportCaster Status*. The ReportCaster Console opens in a new browser window. Click the *Configuration* tab. The Distribution Server trace and log settings can be accessed in the left pane.

The trace files appear in *drive:\ibi\WebFOCUS82\ReportCaster\trc*. In addition, check the log files in *drive:\ibi\WebFOCUS82\ReportCaster\log* for more information.



# Chapter 9

## 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 features make use of the Solr platform:

- InfoSearch
- WebFOCUS Home Page
- Home Widget
- Navigation Widget


### In this chapter:

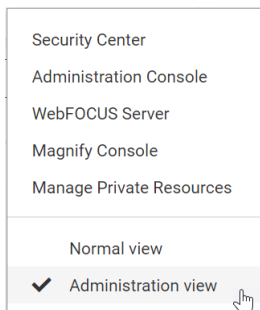
- [Indexing Existing Content](#)

### 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. On the WebFOCUS Home Page, in the Banner, select the Settings icon , and switch from Normal view to Administration view, as shown in the following image.



3. Open a new browser tab for the web services page, for example:

[http://localhost:8080/ibi\\_apps/rs?IBIRS\\_action=TEST](http://localhost:8080/ibi_apps/rs?IBIRS_action=TEST)

4. Click the *utils* button, and in the `indexRepository/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 is a navigation bar with buttons for 'ibfs', 'templates', 'impex', 'utils', 'describe', 'defer', and 'indexadmin'. The 'utils' button is highlighted in blue and has a mouse cursor over it. Below the navigation bar, the page title is 'WebFOCUS utils Web Services'. There is a 'HELP' button and several links: 'compactPolicy', 'describeRepository', 'expandPolicy', and 'indexRepository'. The 'compactPolicy' section is expanded, showing a 'compactPolicy' button and a large empty text area. Below this, the 'describeRepository' section is visible, showing a 'describeRepository' button and a text field containing '85a3014cf62df9e676955b0631e9'. The 'expandPolicy' section is also visible, showing an 'expandPolicy' button and a text field. Finally, the 'indexRepository' section is expanded, showing an 'indexRepository' button and a text field containing '/WFC/Repository' with a close button (x) next to it.

- 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, the 'WebFOCUS utils Web Services' section is visible. It includes a 'HELP' button and links for 'compactPolicy', 'describeRepository', 'expandPolicy', and 'indexRepository'. The 'compactPolicy' (GET) service is shown with a form containing the action 'compactPolicy'. The 'describeRepository' (POST) service is shown with a form containing the path '/WFC/Repository', the action 'describeRepository', and the token '85a3014cf62df9e676955b0631e9'. The 'expandPolicy' (GET) service is shown with a form containing the action 'expandPolicy'. The 'indexRepository' (POST) service is shown with a form containing the action 'indexRepository' and the token '85a3014cf62df9e676955b0631e9'.

7. 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>
```

8. From the WebFOCUS Administration Console menu bar, click *Clear Cache* and, when you receive a confirmation message, click *OK*.
9. Sign out of WebFOCUS and then sign back in to WebFOCUS.
10. Depending on the widget you want to use, navigate to *webfocus\_instance/ibi\_apps/home\_widget* or *webfocus\_instance/ibi\_apps/navigation\_widget*.

## Configuring TIBCO WebFOCUS® Help

---

WebFOCUS Help is configured, by default, to use Online Help that is hosted by ibi servers. This Help configuration is applied for new installations or when upgrading from an earlier release. The installation package no longer includes the help files, which greatly reduces the installation file size and time required to install and configure the software.

Benefits include:

- Hosted Help model that enables you to access the most current Online Help content at any time.
- Upgraded delivery model that reduces the size of the product software package, and simplifies installation and configuration.
- Online Help access using a secure connection to the ibi server hosting the Online Help system (HTTPS).

**In this appendix:**

- [Deploying TIBCO WebFOCUS® Online Help On-Premise](#)
  - [Verifying the TIBCO WebFOCUS® Online Help Download File](#)
  - [Deploying the TIBCO WebFOCUS® Online Help Web Application Using a Context File in Tomcat](#)
  - [Configuring TIBCO WebFOCUS® to Point to the Help on the Remote Server](#)
- 

### Deploying TIBCO WebFOCUS® Online Help On-Premise

If you are restricted from using Hosted Help, the following procedure describes how to install Online Help on your own internal application server.

For Release 8207.26, open a Support ticket through [InfoResponse LIVE](#) to request the Online Help files.

For Release 8207.27.0, you can obtain the Online Help from the following locations:

- [ibi\\_help8207.zip](#)
- [ibi\\_help8207.zip.sha512](#)

## Requirements

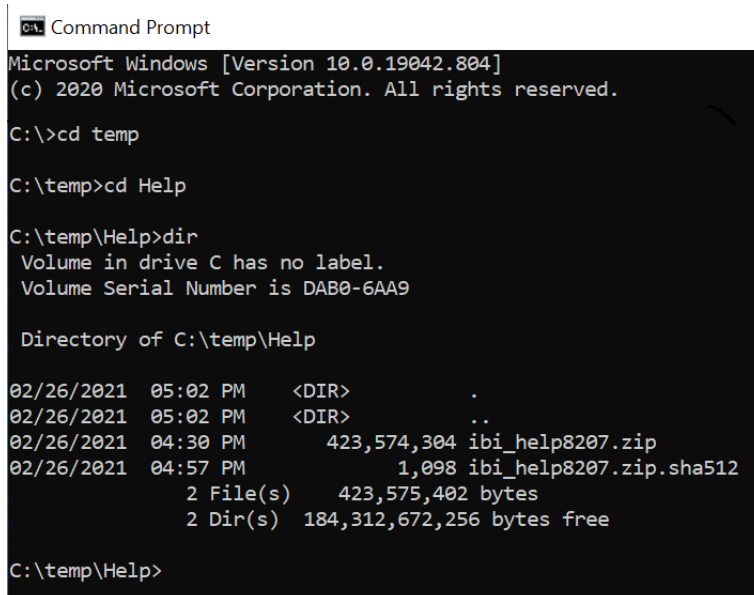
The following are the requirements for WebFOCUS Online Help.

- Java 8.
- A supported application server.

## Verifying the TIBCO WebFOCUS® Online Help Download File

Once the WebFOCUS Online Help has been downloaded, you can verify the Online Help .zip file using the SHA-512 hash file provided. The following is an example using the certutil command.

1. From the Windows Start menu, run the `cmd` command and navigate to the directory where the `ibi_help8207.zip` and `ibi_help8207.zip.sha512` files are located, as shown in the following image.



```
CA. Command Prompt
Microsoft Windows [Version 10.0.19042.804]
(c) 2020 Microsoft Corporation. All rights reserved.

C:\>cd temp

C:\temp>cd Help

C:\temp\Help>dir
Volume in drive C has no label.
Volume Serial Number is DAB0-6AA9

Directory of C:\temp\Help

02/26/2021  05:02 PM    <DIR>          .
02/26/2021  05:02 PM    <DIR>          ..
02/26/2021  04:30 PM             423,574,304 ibi_help8207.zip
02/26/2021  04:57 PM              1,098 ibi_help8207.zip.sha512
                2 File(s)      423,575,402 bytes
                2 Dir(s)  184,312,672,256 bytes free

C:\temp\Help>
```

2. Run the following command in the same directory where the `ibi_help8207.zip` and `ibi_help8207.zip.sha512` files are located.

```
certutil -hashfile ibi_help8207.zip SHA512
```

**Note:** For Linux, open a bash command shell, `cd` to the directory where `ibi_help8207.zip` is located, and run:

```
sha512sum ibi_help8207.zip
```

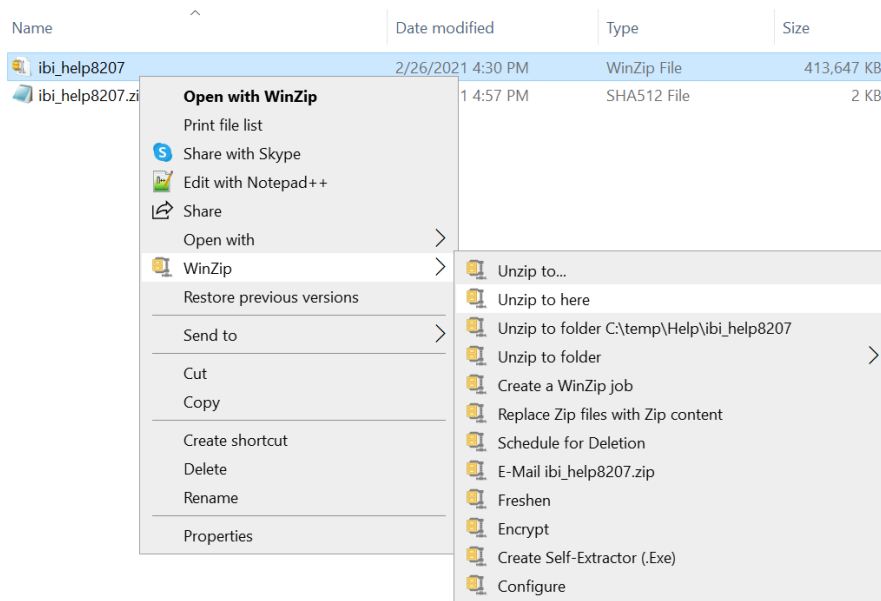
3. Compare the output to the hash string in `ibi_help8207.zip.sha512` to validate the downloaded `ibi_help8207.zip` file. For example:
  - a. Copy and paste the output of the `certutil` command to an editor and open the provided `ibi_help8207.zip.sha512` in the same editor.
  - b. Compare the strings in both files to ensure they contain the same characters (uppercase characters and spacing do not need to match).

```

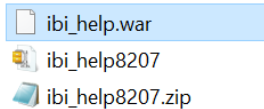
*Untitled - Notepad
File Edit Format View Help
SHA512 hash of ibi_help8207.zip:
fb0f2b8df591b4b2f2e1babaa6c8e679602d2e89810ed63d346c4fc5ccdfa56ca2b6240aff00247f4bb16f4ad1e0cf6fa9f6e0b44e3530e92d314343234ead9

ibi_help8207.zip
fb0f2b8df591b4b2f2e1babaa6c8e679602d2e89810ed63d346c4fc5ccdfa56ca2b6240aff00247f4bb16f4ad1e0cf6fa9f6e0b44e3530e92d314343234ead9
  
```

- c. Once the `ibi_help8207.zip` file has been validated, proceed with Step 4.
4. Extract the WebFOCUS Online Help web app, `ibi_help.war`, from the `ibi_help8207.zip` file, as shown in the following image.



The `ibi_help.war` is now available to be deployed, as shown in the following image.



## Deploying the TIBCO WebFOCUS® Online Help Web Application Using a Context File in Tomcat

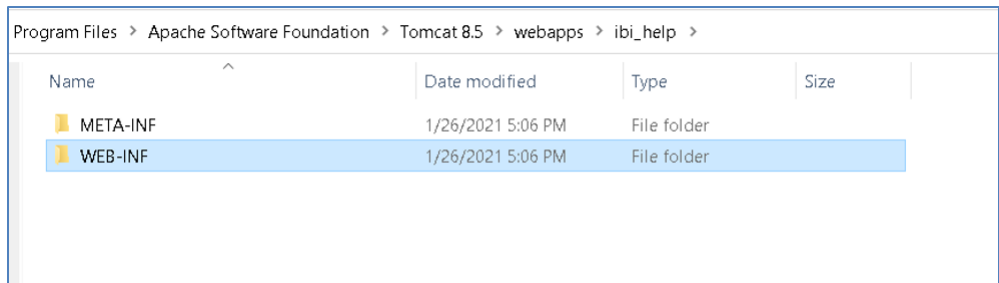
The following steps outline how to deploy the WebFOCUS Help using a context file in Tomcat.

1. Stop Tomcat to create an `ibi_help.xml` context file in the Tomcat conf directory. For example, `C:\Program Files\Apache Software Foundation\Tomcat 8.5\conf\Catalina\localhost\ibi_help.xml`.
2. Edit the `ibi_help.xml` file in the Tomcat conf directory and add the following required syntax and parameters, where `docBase` is the path to the WebFOCUS Online Help web application and `path` is `/ibi_help`. For example:

```
<?xml version='1.0' encoding='utf-8'?>
<Context docBase="C:\temp\Help\ibi_help.war" path="/ibi_help">
</Context>
```

In this example, the `ibi_help.war` file is located in the `C:\temp\Help\` directory.

3. Start Tomcat and verify that the `ibi_help.war` has been deployed in Tomcat, as shown in the following image.

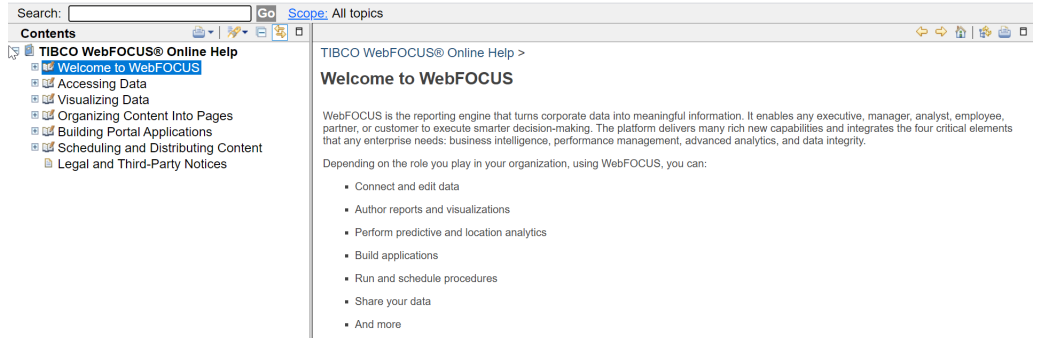


4. From a browser, specify the following URL to confirm that WebFOCUS Online Help is available:


[http://<servername>:<port>/ibi\\_help/index.jsp](http://<servername>:<port>/ibi_help/index.jsp)

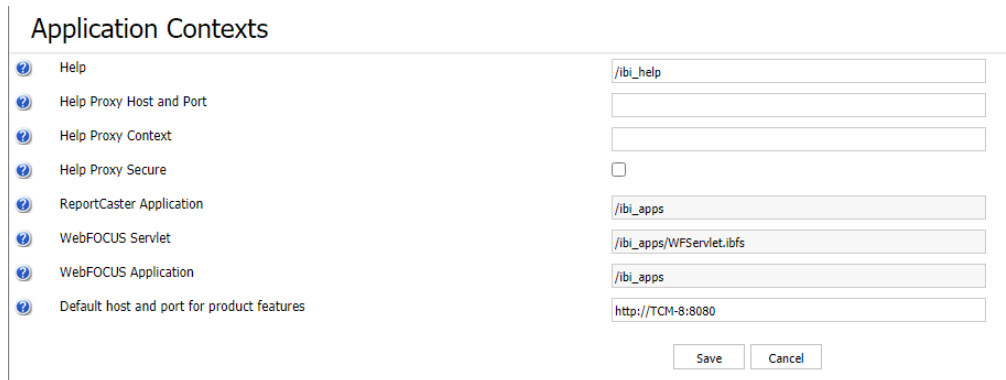


The WebFOCUS Online Help displays, as shown in the following image.



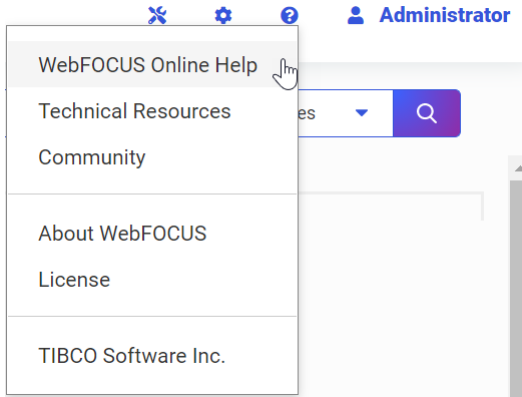
## Configuring TIBCO WebFOCUS® to Point to the Help on the Remote Server

1. Start WebFOCUS.
2. Click the Settings icon  on the WebFOCUS Home page banner and select *Administration Console*.
3. On the Application Contexts page of the Administration Console Configuration tab, confirm that the Help Proxy Host and Port and the Help Proxy Context fields are blank, as shown in the following image.

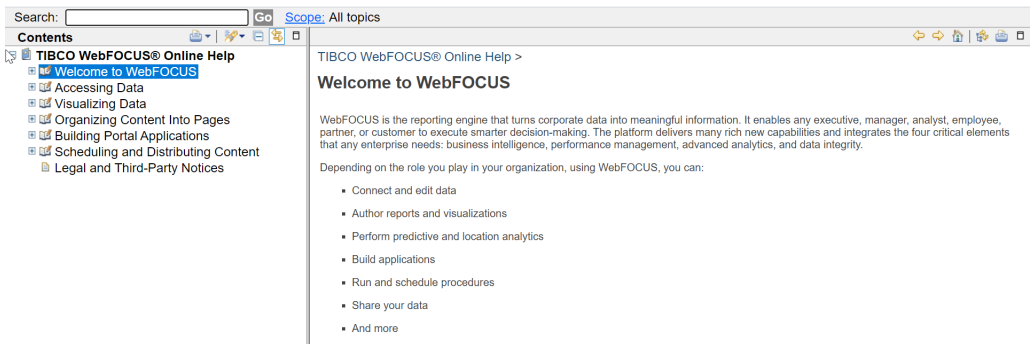


4. Verify that the WebFOCUS Online Help is accessible from the Help menu.

Select *WebFOCUS Online Help*, as shown in the following image.



The WebFOCUS Online Help displays, as shown in the following image.



## 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

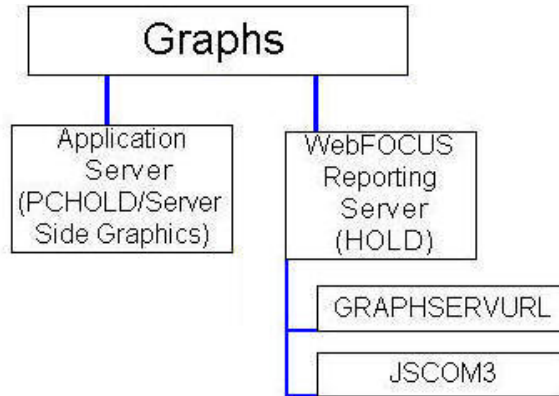
Server-side WebFOCUS graphs are generated by a Java-based graph engine installed with WebFOCUS components. GRAPH53 is the server-side WebFOCUS graph engine. It contains support for many different graph types and advanced 3D graph options. HTML5 graphs are also available. HTML5 graphs are created as Java 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 172.

- ❑ On the WebFOCUS Reporting Server (HOLD), as explained in [HOLD Graphs Overview](#) on page 172.



## 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.

## 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 GRAPHSEVURL is not set in cgivars.wfs or a procedure. It can also be used if GRAPHSEVURL 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:

```
drive:\ibi\apps\ibisamp\cargrsrv.fex
```

This procedure creates a file called holdtest.png in baseapp. You can use the procedure to test the HOLD configurations that follow. If GRAPHSEVURL 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 GRAPHSEVURL= " "
```

## Configuring GRAPHSEVURL

No special configuration is needed to use GRAPHSEVURL, provided you have deployed the WebFOCUS web application to your application server. GRAPHSEVURL 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 GRAPHSEVURL=http://hostname:port/ibi_apps/IBIGraphServlet
```

where:

```
hostname:port
```

Are the host name and port of the web server or application server.

GRAPHSEVURL 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 GRAPHSEVURL and use JSCOM3 or IBIJAVAPATH for a specific procedure by setting GRAPHSEVURL 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.

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:

```
drive:\ibi\WebFOCUS82\ibi_html\javaassist\images\tdg
```

Provided the JSCOM3 listener is started, no steps are needed to configure it in WebFOCUS 8.2. In order for JSCOM3 to start on Windows, your search PATH must contain the jvm.dll file for your Java release. The jvm.dll file is installed with the Java JDK in the jre\bin\client directory. For example:

```
C:\ibi\WebFOCUS82\jre\bin\client
```

The exact JDK directory depends on your Java release. For a different JDK release, substitute accordingly. If you need assistance, see the *TIBCO WebFOCUS® Reporting Server Installation* manual.

**Note:** If the server is not on Windows, see the documentation for your server for information on starting the JSCOM3 listener. On most UNIX platforms, this requires that you set and export a JDK\_HOME variable to the location of the Java JDK.





This appendix optionally applies to Managed Reporting and ReportCaster users. It contains:

- ❑ Reference information about repositories ([Repository JDBC Concepts](#) on page 177 and [Repository Connection Information](#) on page 180).
- ❑ Sizing information for creating tablespaces ([Sizing Guidelines](#) on page 185).
- ❑ Lesser used tasks and configuration information ([Other TIBCO WebFOCUS® Repository Utilities and Tasks](#) on page 187).
- ❑ SQL Server configuration information for those less familiar with SQL Server ([SQL Server Pre-Installation Steps](#) on page 190).
- ❑ MySQL database installation and configuration information ([MySQL Repository Set Up](#) on page 193).

**In this appendix:**

- ❑ [Repository JDBC Concepts](#)
  - ❑ [Repository Connection Information](#)
  - ❑ [Sizing Guidelines](#)
  - ❑ [Other TIBCO WebFOCUS® Repository Utilities and Tasks](#)
  - ❑ [SQL Server Pre-Installation Steps](#)
  - ❑ [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:

```
drive:\ibi\WebFOCUS82\ReportCaster\bin\classpath.bat
```

and in the registry:

```
HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Information Builders\ReportCaster\WF82\Parameters\Java\Classpath
```

- ❑ For the application server, you set your application server CLASSPATH variable to include the driver file or files.

For Apache Tomcat, this is set if you choose to configure Tomcat when you install WebFOCUS Client. To manually set it, use the Start menu to select *Tomcat Configuration Utility*, under the Information Builders app. Then, select the *Java* tab and add a semicolon (;) plus the full path of the file to the end of the *Java Classpath* field.

**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.bat` 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 181.

- For Derby, see [Derby Connection Information](#) on page 182.
- For MySQL, see [MySQL Connection Information](#) on page 183.
- For Oracle, see [Oracle Connection Information](#) on page 183.
- For SQL Server, see [SQL Server Connection Information](#) on page 184.
- 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 193.

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:orasid`

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. These steps are described in [SQL Server Pre-Installation Steps](#) on page 190.

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;datasenname=database_name
```

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 Tablespace

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.

<b>Table Name</b>	<b>Rows</b>	<b>Max Rows Width (bytes)</b>	<b>Notes</b>
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.
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			

Table Name	Rows	Max Rows Width (bytes)	Notes
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.

## Other TIBCO WebFOCUS® Repository Utilities and Tasks

This section describes lesser used WebFOCUS Repository related information, utilities, and tasks.

### TIBCO WebFOCUS® Repository Table Creation

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.

### Changing the TIBCO WebFOCUS® Repository

If you wish to change repositories, you must adjust the connection parameters:

- CLASSPATH (parameter that specifies the location of the JDBC driver used for the selected WebFOCUS database)

- ❑ JDBC CLASS. Stored in install.cfg parameter: IBI\_REPOS\_DB\_DRIVER
- ❑ JDBC URL. Stored in install.cfg parameter: IBI\_REPOS\_DB\_URL
- ❑ Credentials. Stored in install.cfg parameters: IBI\_REPOS\_DB\_USER and IBI\_REPOS\_DB\_PASSWORD
- ❑ Update the JDBC path stored in \utilities\sertenv\utilusersvars.bat

If you are using the same database server and just wish to change repositories, you normally only need to change the JDBC URL or credentials. If you are moving between database types (going from WebFOCUS to Db2), you must also adjust the JDBC CLASS and change the driver in CLASSPATH.

### **Procedure:** How to Change Connection Information

1. Ensure the JDBC driver for the new database server is installed on the WebFOCUS Client and the Distribution Server machines.

The JDBC driver information is stored in the *drive:\utilities\setenv\utilsetvars.bat* file under the JDBC\_PATH parameter.

**Note:** The value must be enclosed in double quotation marks (") if the path contains a space.

2. If this is a different driver, add the JDBC driver path to the CLASSPATH of the application server.

For example, for Apache Tomcat, you can use the Start menu by selecting *Tomcat Configuration Utility*, under the Information Builders app. Then, select the *Java* tab and add a semicolon (;) plus the full path of the file to the end of the *Java Classpath* field.

3. Restart your application server.
4. Modify the install.cfg file and provide updated values for JDBC CLASS, JDBC URL, and Credentials.

**Note:** The database password will get encrypted after restarting the application server.

5. Optionally, sign in to the WebFOCUS Administration Console from the Administration menu to review repository configuration information.
6. Click the *Configuration* tab, expand *Application Settings*, and then select *Repository*.

The Repository pane opens, as shown in the following image.

### Repository

Database Driver	com.microsoft.sqlserver.jdbc.SQLServerDriver
Database URL	jdbc:sqlserver://bigscm57:1433;DatabaseName:
Database User ID	bigscm02
Database Password	.....
Synchronization Interval	1
User Name Cache Limit	500
External Group Cache Limit	500
External Group Cache Duration	180
User Profile Cache Duration	30
Effective Policy Cache Limit	50
Effective Policy Cache Duration	180
Procedure Cache Limit	100
Update Last Access Time	On

This allows you to see the values entered for the following:

- Database Driver
- Database URL
- Database User ID
- Database Password

Only Database Password can be changed through the Administration Console. The password will get encrypted and written to install.cfg.

7. If this is a different driver, update the JDBC driver path to the following ReportCaster configuration file:

```
drive:\ibi\WebFOCUS82\ReportCaster\bin\classpath.bat
```

and to the following value in the registry:

```
HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Information Builders
\ReportCaster\WF82\PARAMETERS\JAVA\CLASSPATH
```

8. Restart the WebFOCUS web application and the Distribution Server.

**Note:** You do not have to restart the entire application server which may have other applications deployed on it.

### SQL Server Pre-Installation Steps

The following are general guidelines and information for creating an SQL Server database to be used as the WebFOCUS repository. These steps should be performed by a DBA to apply options and configuration settings that meets your organizations specifications.

- Ensure that SQL Server Authentication is enabled. See [How to Configure Security](#) on page 190.
- Create a SQL Server account that you will use to own this database. See [How to Create the Login ID](#) on page 191.
- Create a SQL Server database for the repository. See [How to Create the Repository Database](#) on page 192.
- Set up connectivity between the WebFOCUS Client and the SQL Server. See [How to Install the JDBC Driver for SQL Server](#) on page 192.
- If you are using SQL Server, you must enable TCP/IP since it is disabled by default. See [How to Enable TCP/IP in SQL Server](#) on page 193.

The WebFOCUS repository can reside on the same system as the WebFOCUS Client or on a different system, and can be stored in any JDBC-compliant database for which a driver exists. For more information, see [TIBCO WebFOCUS® Client Post-Installation Tasks](#) on page 121. When the Distribution Server is installed (as explained in [Installing the TIBCO WebFOCUS® Client](#) on page 41), you will be required to provide a supported database, JDBC driver, and authentication information (user ID and password).

#### **Procedure:** How to Configure Security

SQL Server provides the following authentication modes:

- Windows Authentication.** Uses the same IDs as the Windows operating system.
- SQL Server Authentication.** Uses IDs defined within SQL Server.

The JDBC driver that is used by WebFOCUS to connect to the SQL Server database does not support Windows Authentication mode. Perform the following steps to ensure that SQL Server Authentication mode is set:

1. Open the SQL Server Management Studio.
2. Connect to your database server.

3. Right-click your SQL Server and choose *Properties*.
4. On the left, click *Security*.
5. Ensure that *Server authentication* is set to *SQL Server and Windows Authentication mode*. If *Authentication* is set to *Windows Authentication mode*, change the setting.
6. Click *OK*.
7. If you changed the authentication mode, restart SQL Server.

### **Procedure:** How to Create the Login ID

1. In the SQL Server Management Studio, expand your SQL Server and expand the *Security* folder.
2. Right-click *Logins*.
3. Select *New Login*.

The screenshot shows the 'Login - New' dialog box in SQL Server Enterprise Manager. The dialog is titled 'Login - New' and has a 'Script' button and a 'Help' button. On the left, there is a 'Select a page' pane with options: General, Server Roles, User Mapping, Securables, and Status. Below that is a 'Connection' pane showing 'Server: JQJD-PC\SQLEXPRESS' and 'Connection: IBI\m00143' with a 'View connection properties' link. At the bottom left is a 'Progress' pane showing a 'Ready' status. The main area contains the following fields and options:

- Login name:** A text box with a 'Search...' button.
- Authentication:** Radio buttons for 'Windows authentication' (selected) and 'SQL Server authentication'.
- Password:** A text box.
- Confirm password:** A text box.
- Specify old password:** A checkbox.
- Old password:** A text box.
- Enforce password policy:** A checked checkbox.
- Enforce password expiration:** A checked checkbox.
- User must change password at next login:** A checked checkbox.
- Mapped to certificate:** A radio button with a dropdown menu.
- Mapped to asymmetric key:** A radio button with a dropdown menu.
- Map to Credential:** A checkbox with a dropdown menu.
- Add:** A button.
- Mapped Credentials:** A table with columns 'Credential' and 'Provider'.
- Remove:** A button.
- Default database:** A dropdown menu set to 'master'.
- Default language:** A dropdown menu set to '<default>'.
- OK:** A button.
- Cancel:** A button.

4. Enter the user ID you wish to use in the *Login name* field.
5. Select *SQL Server authentication*.
6. Enter and confirm your password.
7. Uncheck the boxes for *Enforce password policy*, *Enforce password expiration*, and *User must change password at next login*.
8. Click *OK*.

### **Procedure: How to Create the Repository Database**

1. In the SQL Server Management Studio, right-click the *Databases* folder.
2. Select *New Database*.

A form appears for adding a database.

3. Type a name for the repository database in the *Database name* field.
4. In the *Owner* field, enter the user ID you created in [How to Create the Login ID](#) on page 191.

You can leave the remaining defaults. An initial size of 50MB for the database should be adequate for most departmental applications, but you may want to increase the initial size of the database if you anticipate a lot of use.

5. Under the *Options* panel, ensure you click *Collation* and select a Case-sensitive (CS) collation.
6. Click *OK*, and the database is created.

It is a good idea to set this database as the default for your user ID. To do this, under *Security and Logins*, right-click your user ID and choose *Properties*. Then set the *Default database* and click *OK*.

### **Procedure: How to Install the JDBC Driver for SQL Server**

The application server where the WebFOCUS Client and the ReportCaster Distribution Server is deployed on use the SQL Server JDBC driver to access the WebFOCUS Repository. You should download the SQL Server JDBC driver for your SQL Server release.

Supported versions of JDBC drivers are posted on:

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

If WebFOCUS Client and ReportCaster Distribution Server are on separate machines, the driver must be on both machines. Running the driver installation program is not necessary, so you can manually copy the driver files between different machines.



During the ReportCaster Distribution Server installation, you are prompted for the file or files, as explained in *Installing the TIBCO WebFOCUS® Client* on page 41. In addition, if you manually configure your application server, you must also provide the file or files, as explained in *Configuring Web and Application Servers* on page 83.

**Procedure: How to Enable TCP/IP in SQL Server**

SQL Server have TCP/IP disabled, by default. Since the WebFOCUS Client and ReportCaster require TCP/IP, you must perform the following steps to enable TCP/IP in SQL Server.

1. Open the SQL Server Configuration Manager.
2. Under the *SQL Server Network Configuration* select *Protocols for MSSQLSERVER*.

A list of valid network protocols for the SQL Server engine is displayed in the right pane.

3. Select *TCP/IP* from the list of available protocols.
4. Right-click *TCP/IP* and select *Enable* from the context menu.

A message is displayed, which indicates that the MSSQLSERVER service must be restarted before the change is applied.

5. Restart the MSSQLSERVER service.

## 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>

You can download either the regular Windows install or the Windows essential install.

The following page includes documentation on installing, configuring, administering, and using MySQL:

<http://dev.mysql.com/doc/mysql/en/index.html>

2. Execute the MySQL installation program.

A typical installation is sufficient for WebFOCUS. You can keep all default settings during the installation and configuration.

3. Be sure to provide a password for the root account when prompted.

## 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

By default, you run MySQL as a Windows service. To start, stop, or restart MySQL:

1. Open the Services Window by selecting *Control Panel, Administrative Tools*, and then *Services*.
2. Right-click *MySQL* and choose *Start, Stop, or Restart*.

After you install MySQL, it may be running by default and may start automatically with Windows.

## Administering MySQL

You administer MySQL using a command line tool. You can launch this from the Start menu by selecting *Programs, MySQL, MySQL Server 5.0*, and then *MySQL Command Line Client*.

Sign in to the command line tool using the password you specified during the MySQL installation.

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 TIBCO 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.

You can do this by selecting *Start, Programs, MySQL, MySQL Server 5.0*, and then *MySQL Command Line Client*.

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;
```

6. 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.

7. 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 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. Use Winzip to extract the MySQL JDBC driver JAR file. For example:

`mysql-connector-java-3.1.14-bin.jar`

3. 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.

## Additional TIBCO WebFOCUS® Configuration Options

---

This appendix includes uncommon configurations. Most users do not need the configurations discussed in this appendix. The following configuration options are discussed:

- Installing multiple instances of WebFOCUS on a single machine (*Installing Multiple TIBCO WebFOCUS® Instances on the Same Machine* on page 199).
- Setting optional Tomcat security options (*Tomcat Security Tips* on page 202).

### In this appendix:

- [Installing Multiple TIBCO WebFOCUS® Instances on the Same Machine](#)
  - [Tomcat Security Tips](#)
- 

## Installing Multiple TIBCO WebFOCUS® Instances on the Same Machine

You can run multiple copies (instances) of WebFOCUS on the same machine, if necessary. To do this, install WebFOCUS multiple times, making sure to change default locations, program folders, and ports.

This section provides an overview. Detailed information varies depending on your web server and application server.

## Installing Additional TIBCO WebFOCUS® Instances

No special steps are required to install and configure the first instance of WebFOCUS. If WebFOCUS is already installed and you just wish to add a second instance, you can keep the existing instance as is. However, if no WebFOCUS instances have been installed yet, you may wish to use non-default locations and names for all instances.

When installing a second WebFOCUS instance, keep the following in mind:

- When installing the second WebFOCUS Reporting Server, do not choose to update an existing installation or create a new configuration. Instead, run a completely new installation.

If a WebFOCUS Reporting Server is already installed, select *No* if prompted to replace the existing installation. If multiple WebFOCUS Reporting Servers are installed, select the *New Installation/Configuration* option to not upgrade any of them.

**Note:** It is possible to use the same WebFOCUS Reporting Server with two instances of WebFOCUS Client.

- Place the components for each instance in a different directory. Some WebFOCUS components must be installed in an \ibi\ directory, so use root directories such as:  
`C:\wfTest\ibi`  
`C:\wfDev\ibi`
- Change the default program folders when installing additional instances. For example, add some text to the end of the default names.
  - `WebFOCUS 82 Server - Test`
  - `WebFOCUS 82 Server - Dev`
  - `WebFOCUS 82 - Test`
  - `WebFOCUS 82 - Dev`
  - `ReportCaster 82 - Test`
  - `ReportCaster 82 - Dev`
- Change the default ports for the WebFOCUS Reporting Server and ReportCaster Distribution Server, so that each instance uses a different set of ports.
- When specifying the web server host name, be sure to use the correct port and the exact host name you will use for the website. If this is a separate port, provide the correct port. If this is a virtual host name, be sure to use the name you will set up in the DNS, including the domain.
- For the WebFOCUS repository, create a separate instance.
- If you are using IIS, ensure you are using a server operating system.
- Do not choose any of the automatic web server or application server configuration options for additional WebFOCUS instances. You must manually configure all but the first WebFOCUS instance you install.

Install WebFOCUS components, keeping these points in mind. For details, see [Installing the TIBCO WebFOCUS® Client](#) on page 41.



## Configuring Multiple Web and Application Servers

Each instance of WebFOCUS requires a separate web server, website, or application server instance. You can set up each web server or application server instance to either listen on a separate port or use a virtual host name. Your options depend on whether you use Apache Tomcat with or without Microsoft IIS.

### ❑ Apache Tomcat Stand-alone

When using Tomcat as both the web server and application server, you run two separate instances of Tomcat and set them up to listen on different ports. For example, you could access one WebFOCUS instance at:

```
http://hostname:8080/ibi_apps/WFServlet
```

and the other WebFOCUS instance at:

```
http://hostname:9080/ibi_apps/WFServlet
```

To create a second Tomcat 8 or Tomcat 9 instance, you can copy the Tomcat directory structure, set unique ports, and create a new service using the `tomcat8.exe //IS//Tomcat8Test` or `tomcat9.exe //IS//Tomcat9Test` option. You must then edit the registry values for the new service so they are similar to those for the default service, but specify the new instance paths.

### ❑ Microsoft IIS with Apache Tomcat

Microsoft IIS can be used as the web server, while Tomcat can be used as the application server. This can involve IIS listening on separate ports or using the HTTP host header (virtual host name) feature.

When using virtual host names, you configure the DNS server so that multiple host names resolve to the same machine. When IIS receives a request for a webpage or other resource, IIS can determine which host name was used when the request was made by looking at the HTTP host header. IIS then uses the host name to determine which website was requested.

For example, if you are using virtual host names, you could access one instance of WebFOCUS at:

```
http://www.wfDevhost.com/ibi_apps/WFServlet
```

and the other WebFOCUS instance at:

```
http://www.wfTesthost.com/ibi_apps/WFServlet
```

Although different host names are used, they both resolve to the same machine and are received by the same IIS web server.

For Tomcat with IIS, you run two separate instances of Tomcat and set them up to listen on different ports. You then create two IIS websites and ensure that each IIS website sends servlet requests to a different Tomcat instance. You can configure the two IIS websites to either use different ports or virtual host names.

To create a second Tomcat 8 or Tomcat 9 instance, copy the Tomcat directory structure, set unique ports, and create a new service using the `tomcat8.exe //IS//Tomcat8Test` or `tomcat9.exe //IS//Tomcat9Test` option. You must then edit the registry values for the new service so they are similar to those for the default service, but specify the new instance paths.

## Tomcat Security Tips

This section provides some basic tips on security concerns when running Tomcat in a production WebFOCUS environment. For development environments that are safely behind a firewall, this section is normally optional. You must be an administrator to the Windows machine to perform tasks in this section.

### Tomcat User ID and NTFS Permissions

By default, when Tomcat runs as a Windows service, it runs as the Local System account that was created with Windows. The Local System account has full access to your Windows system. In a production environment, it is a good idea to run Tomcat as a user who has more restricted access. To do this, create a user ID for Tomcat, configure Tomcat to use that ID, and set NTFS permissions to grant that ID full access to Tomcat, WebFOCUS, and other directories it needs.

#### **Procedure:** How to Create a Tomcat User ID

1. Open the Windows Control Panel, *Administrative Tools*, and *Computer Management*.
2. Under System Tools, expand *Local Users and Groups*.
3. Right-click *Users* and select *New User*.
4. Name the new user and provide a password.
5. Deselect *User must change password at next logon*, and select *Password never expires*.
6. Click *Create*.

The Tomcat user is created and added to the users group. An administrator may wish to move Tomcat into a special group with even less access to the system. However, if you do this, you must ensure Tomcat can read and execute from all the Java directories and any required JDBC drivers.

7. Click *Close* to close the New User window.

**Procedure: How to Configure Tomcat to Use the Tomcat User ID**

1. Open the Windows Services window.
2. If Tomcat is started, right-click *Apache Tomcat* and select *Stop*.
3. Right-click *Apache Tomcat* and select *Properties*.  
The Apache Tomcat Properties window appears.
4. Select the *Log On* tab.  
By default, this is set to the Local System account.
5. Click *This account*.
6. Specify the Tomcat user ID in the *This account* field.
7. Type and confirm the password you defined for the Tomcat user ID. If you ever change this password, you must change it here as well.
8. Click *OK*.

A message similar to the following should display:

`This account .\Tomcat has been granted Log On As a Service right.`

**Reference: Permissions Concerns**

Required NTFS permissions and user IDs vary depending on your system, environment, security needs, and administrator preferences. Tomcat, IIS, and the WebFOCUS Reporting Server normally run as separate accounts and there are cases where they all read or write to the same directory or file. It is a good idea to create a group containing all the required user IDs.

The *TIBCO WebFOCUS® Security and Administration* manual contains additional information on permissions.

If the Tomcat user is not in the default Users group and/or you have restricted permissions throughout your system, ensure the Tomcat user ID can read from the directories containing any JDBC drivers. In addition, ensure Tomcat can read and execute the directories containing the Java JDK.



# Legal and Third-Party Notices

SOME TIBCO SOFTWARE EMBEDS OR BUNDLES OTHER TIBCO SOFTWARE. USE OF SUCH EMBEDDED OR BUNDLED TIBCO SOFTWARE IS SOLELY TO ENABLE THE FUNCTIONALITY (OR PROVIDE LIMITED ADD-ON FUNCTIONALITY) OF THE LICENSED TIBCO SOFTWARE. THE EMBEDDED OR BUNDLED SOFTWARE IS NOT LICENSED TO BE USED OR ACCESSED BY ANY OTHER TIBCO SOFTWARE OR FOR ANY OTHER PURPOSE.

USE OF TIBCO SOFTWARE AND THIS DOCUMENT IS SUBJECT TO THE TERMS AND CONDITIONS OF A LICENSE AGREEMENT FOUND IN EITHER A SEPARATELY EXECUTED SOFTWARE LICENSE AGREEMENT, OR, IF THERE IS NO SUCH SEPARATE AGREEMENT, THE CLICKWRAP END USER LICENSE AGREEMENT WHICH IS DISPLAYED DURING DOWNLOAD OR INSTALLATION OF THE SOFTWARE (AND WHICH IS DUPLICATED IN THE LICENSE FILE) OR IF THERE IS NO SUCH SOFTWARE LICENSE AGREEMENT OR CLICKWRAP END USER LICENSE AGREEMENT, THE LICENSE(S) LOCATED IN THE "LICENSE" FILE(S) OF THE SOFTWARE. USE OF THIS DOCUMENT IS SUBJECT TO THOSE TERMS AND CONDITIONS, AND YOUR USE HEREOF SHALL CONSTITUTE ACCEPTANCE OF AND AN AGREEMENT TO BE BOUND BY THE SAME.

This document is subject to U.S. and international copyright laws and treaties. No part of this document may be reproduced in any form without the written authorization of TIBCO Software Inc.

TIBCO, the TIBCO logo, the TIBCO O logo, FOCUS, iWay, Omni-Gen, Omni-HealthData, and WebFOCUS are either registered trademarks or trademarks of TIBCO Software Inc. in the United States and/or other countries.

Java and all Java based trademarks and logos are trademarks or registered trademarks of Oracle Corporation and/or its affiliates.

All other product and company names and marks mentioned in this document are the property of their respective owners and are mentioned for identification purposes only.

This software may be available on multiple operating systems. However, not all operating system platforms for a specific software version are released at the same time. See the readme file for the availability of this software version on a specific operating system platform.

THIS DOCUMENT IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT.

THIS DOCUMENT COULD INCLUDE TECHNICAL INACCURACIES OR TYPOGRAPHICAL ERRORS. CHANGES ARE PERIODICALLY ADDED TO THE INFORMATION HEREIN; THESE CHANGES WILL BE INCORPORATED IN NEW EDITIONS OF THIS DOCUMENT. TIBCO SOFTWARE INC. MAY MAKE IMPROVEMENTS AND/OR CHANGES IN THE PRODUCT(S) AND/OR THE PROGRAM(S) DESCRIBED IN THIS DOCUMENT AT ANY TIME.

---

THE CONTENTS OF THIS DOCUMENT MAY BE MODIFIED AND/OR QUALIFIED, DIRECTLY OR INDIRECTLY, BY OTHER DOCUMENTATION WHICH ACCOMPANIES THIS SOFTWARE, INCLUDING BUT NOT LIMITED TO ANY RELEASE NOTES AND "READ ME" FILES.

This and other products of TIBCO Software Inc. may be covered by registered patents. Please refer to TIBCO's Virtual Patent Marking document (<https://www.tibco.com/patents>) for details.

Copyright © 2021. TIBCO Software Inc. All Rights Reserved.

# Index

## A

- Access Files [17](#)
- AGENT\_NODE parameter [158](#)
- AGENT\_PORT parameter [158](#)
- aliases [84](#)
  - configuring for Apache Tomcat [91](#)
- Apache Tomcat [87](#)
  - CLASSPATH [89](#)
  - configuration options [84](#)
  - configuring manually [87](#)
  - ports [90](#)
  - security [202](#)
  - configuration options [29](#)
- APP PATH settings [148](#)
- applet issues [148](#)
- application servers [10](#), [17](#), [83](#)
  - configuring Apache Tomcat [87](#)
  - configuring for WebFOCUS [83](#)
  - installation with WebFOCUS components [121](#)
  - overview [10](#)
  - requirements [24](#), [25](#), [29](#)
- aproot alias [86](#)
- APPROOT directory [77](#), [86](#)
- authentication for ReportCaster Repositories [34](#), [177](#)

## C

- CLASSPATH [179](#)
  - for Apache Tomcat [89](#)
  - for ReportCaster Distribution Server [179](#)
- Client for WebFOCUS [10](#)
  - verifying [95](#), [128](#)
- communication requirements [28](#)
- communication settings for WebFOCUS Client [129](#)
- configuration files for WebFOCUS Client [123](#)
- configuration verification program [123](#)
- configuring aliases [83](#)
- configuring Apache Tomcat [87](#)
- configuring application servers
  - Apache Tomcat [87](#)
  - configuring ReportCaster Distribution Server [152](#)
  - configuring ReportCaster Failover [139](#)
  - configuring ReportCaster Workload Distribution [139](#)
- configuring servlets [83](#)
- configuring WebFOCUS in a split web-tier environment [121](#)
- context paths [18](#), [86](#)
- context roots [18](#), [86](#)

## D

- Db2 repositories
  - configuring with ReportCaster [30](#)
  - JDBC connection parameters [181](#)

- Db2 repositories
  - JDBC driver types [181](#)
  - JDBC software configuration [30](#)
  - requirements [30](#)
  - requirements for ReportCaster [31](#)
- deploying web applications [83, 86](#)
  - on Apache Tomcat [91](#)
- deployment descriptor [18](#)
- Derby repositories
  - JDBC connection parameters [182](#)
- describeRepository [163](#)
- diagnostic tools [128, 148](#)
- directory structure [77](#)
  - for ReportCaster Distribution Servers [79](#)
  - for WebFOCUS Clients [77](#)
- distributed WebFOCUS configurations [13](#)
- distributing reports [15](#)
- Distribution Server [15](#)
  - requirements [23](#)
  - default port [28](#)
  - directory structure [79](#)
  - disk space requirements [24](#)
  - Failover [139](#)
  - logs [138, 160](#)
  - processing [15](#)
  - requirements [23, 30](#)
  - starting [133](#)
  - stopping [133](#)
  - testing [133, 135](#)
  - traces [160](#)

- Distribution Server [15](#)
  - troubleshooting [147](#)
  - user IDs [19](#)
  - verifying [133, 135](#)
  - Workload [139](#)

## **E**

- email
  - distribution [30](#)
  - servers [30](#)

## **F**

- file extensions [154](#)
- file permissions
  - for Apache Tomcat [202](#)
  - for WebFOCUS Client [80](#)
- Firefox requirements [28](#)
- FTP distribution [30](#)

## **G**

- GRAPHENGINE setting [171](#)
- graphics
  - errors [151](#)
  - options [171](#)
- GRAPHSERVURL [172, 174](#)

## **H**

- HOLD graphics [172, 173](#)
- HTTP host header [199](#)



**I**

ibi\_apps context root [86](#)  
 ibi\_html alias [86](#)  
 indexRepository [162](#)  
 installation  
     verification tool [128](#)  
 installing all WebFOCUS components on the  
 application server [121](#)  
 installing multiple WebFOCUS instances [199](#)  
 iWay software

**J**

jar command [152](#)  
 Java JDK vs. SDK [30](#)  
 Java requirements [30](#)  
 JDBC (Java Database Connectivity) [30](#)  
     class [180](#)  
     class for Db2 [181](#)  
     class for MySQL [183](#)  
     class for Oracle [183](#)  
     class for SQL Server [184](#)  
     driver [178](#)  
     driver requirements [31](#), [179](#)  
     overview [177](#)  
     path [179](#)  
     path for Derby [182](#)  
     requirements [31](#), [177](#)  
     URL [180](#)  
     URL for Db2 [181](#)  
     URL for MySQL [183](#)

JDBC (Java Database Connectivity) [30](#)  
     URL for Oracle [183](#)  
     URL for SQL Server [184](#)  
 JSCOM3 [173](#), [174](#)

**L**

load balancing [14](#)

**M**

Managed Reporting  
     user IDs [19](#)  
 Master Files [17](#)  
 Microsoft IIS (Internet Information Server)  
     creating a website [199](#)  
     ISAPI filter [99](#)  
     configuration options [29](#)  
 Microsoft SQL Server requirements for  
 ReportCaster [190](#)  
 Mozilla Firefox requirements [28](#)  
 MySQL repositories [193](#)  
     configuration [193](#)  
     installation [193](#)  
     JDBC connection parameters [183](#)  
     JDBC driver installation [198](#)  
     requirements for ReportCaster [32](#)

**N**

node blocks [129](#)  
 NTFS permissions  
     for Apache Tomcat [202](#)

NTFS permissions

for WebFOCUS Client [80](#)

## O

odin.cfg file for WebFOCUS Client [129](#)

Oracle

JDBC connection parameters [183](#)

Server requirements for ReportCaster [33](#)

## P

PCHOLD [172](#)

Performance Management Framework (PMF)

PTH [20](#)

## R

remote servers [129](#)

report distribution [15](#)

report processing [11](#)

report scheduling [15](#)

ReportCaster

processing [15](#)

requirements [23](#)

servlets [15](#)

tables [15](#)

traces [160](#)

APIs [15](#)

authentication for repositories [34](#), [177](#)

Client Servlets [15](#)

communication requirements [28](#)

components [15](#)

ReportCaster

default port [28](#)

Development and Administration interface  
[135](#)

directory structure [79](#)

disk space requirements [24](#)

Distribution Server [15](#)

Failover [139](#)

graphics configuration [171](#)

logs [138](#), [160](#)

mail server requirements [30](#)

ports [28](#)

requirements [23](#)

security [19](#)

starting [133](#)

stopping [133](#)

testing [133](#), [135](#)

troubleshooting [147](#)

user IDs [19](#)

verifying [135](#)

Workload [139](#)

Reporting Server for WebFOCUS [10](#)

reports

scheduling [15](#)

repository tables for ReportCaster [177](#)

## S

security [19](#)

PTH [20](#)

for ReportCaster [19](#)

- security [19](#)
    - for WebFOCUS [19](#)
    - options [19](#)
  - server JSCOM3 [173](#), [174](#)
  - Server Side Graphics [172](#)
  - servlet containers [10](#), [17](#)
    - configuring [83](#)
    - requirements [25](#), [29](#)
  - servlets [10](#)
    - ReportCaster [15](#), [83](#)
    - WebFOCUS [95](#)
    - ReportCaster [86](#)
    - ReportCaster troubleshooting [157](#)
    - WebFOCUS [86](#)
  - SMTP (Simple Mail Transfer Protocol)
    - requirements [30](#)
  - Solr [27](#), [161](#)
    - indexing existing content [161](#)
  - split web-tier configuration [121](#)
  - SQL Server repositories [32](#), [190](#)
    - database creation [190](#)
    - JDBC connection parameters [184](#)
    - logon ID creation [191](#)
    - ReportCaster pre-installation tasks [190](#)
    - requirements [190](#)
  - supported JVMs for applets [148](#)
- T**
- time zones [30](#)
- U**
- Tomcat [87](#)
    - CLASSPATH setting [89](#)
    - configuration options [84](#)
    - configuring manually [87](#)
    - effective user ID [202](#)
    - ports [90](#)
    - security [202](#)
    - stand-alone configuration [84](#), [87](#)
    - configuration options [29](#)
  - troubleshooting [147](#)
    - graphics [151](#)
    - ReportCaster [147](#)
    - WebFOCUS [147](#)
- V**
- Universal Object Access Repository
    - changing [187](#)
  - URL servlet calls [98](#)
- W**
- web applications [17](#)
    - deploying [83](#)
    - deploying on Apache Tomcat [87](#)
    - deploying [18](#), [86](#)
    - editing [152](#)

web browsers [10](#)

Web Console [123](#)

web servers [10](#)

    configuring for WebFOCUS [83](#)

    requirements [23](#)

    WebFOCUS installation requirements [23](#)

WEB-INF directory [18](#)

web.xml file [18](#)

WebFOCUS [9](#)

    application server configurations [83](#)

    installation [9](#)

    requirements [23](#)

    web server configurations [83](#)

    authentication options [19](#)

    communication requirements [28](#)

    components [10](#), [11](#)

    configurations [12](#)

WebFOCUS [9](#)

    disk space requirements [24](#)

    distributed configurations [13](#)

    operating system requirements [24](#)

    overview [9](#)

    processing [11](#)

    security [19](#)

    stand-alone configurations [13](#)

    TCP/IP ports [28](#)

    troubleshooting [147](#)

    user ID requirements [24](#)

    user interfaces [123](#), [143](#)

welcome page [124](#)

Windows

    operating system requirements [24](#)

Workload Distribution [139](#)