



# > ShowCase® Essbase® 7.1 Upgrade Guide



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SPSS Inc.  
233 South Wacker Drive, 11th Floor  
Chicago, IL 60606-6412  
Tel: (312) 651-3000  
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# ***Upgrading to ShowCase Essbase 7.1***

## ***Introduction***

This guide will help you upgrade your ShowCase Essbase 4.5, 6.2, 6.5, or 6.51 production environment to ShowCase Essbase 7.1 running on OS/400 V5R1, V5R2, or V5R3. The procedures in this guide help you reduce migration problems and downtime for your production data.

This version of ShowCase Essbase includes Essbase Integration Services (EIS) 7.1. If you are licensed for this option, pay special attention to the steps in this guide related to EIS.

Essbase 7.1 should be installed into a separate directory when running on a system with STRATEGY 6.5 or ShowCase Suite 7.0.

*Important:* In STRATEGY 4.5, all STRATEGY, Essbase, and Analyzer applications were shipped on the same CD. Beginning with ShowCase Suite 6.5, Essbase and Analyzer are separately installed products. Depending on which products you purchased, the **ShowCase Suite CD set** can include up to four CDs: **ShowCase Suite 7.0 Base**, **ShowCase Essbase 7.1** (2 CDs), and/or **ShowCase Analyzer 7.01**. The 7.0 Base CD contains ShowCase Suite client applications, Warehouse Manager Server applications, and Enterprise Reporting applications. The Essbase 7.1 CD contains Essbase applications. The Analyzer 7.01 CD contains Analyzer applications.

## ***Send Us Your Comments***

Your comments are important to us. Please tell us what you think about ShowCase Essbase documentation by contacting:

Documentation Team  
SPSS Inc.  
4115 Highway 52 NW, Suite 300  
Rochester, MN 55901-0144  
Tel: (507) 288-5922  
E-mail: [DocumentationRoch@spss.com](mailto:DocumentationRoch@spss.com)

## ***Before You Upgrade***

You may upgrade to ShowCase Essbase 7.1 from STRATEGY 4.5, STRATEGY Essbase 6.2, STRATEGY Essbase 6.5, or STRATEGY Essbase 6.51.

## **Upgrade Overview**

We recommend you first upgrade your test environment to ShowCase Essbase 7.1 without using new features. Then if you encounter problems during the upgrade process, it will be easier for you and/or Technical Support to isolate the source of the problem. By introducing one change at a time, you will likely identify any problems that occur as related to the specific change.

You will follow these general steps:

1. Save server information.
2. Duplicate and move all or a portion of your 4.5, 6.2, 6.5, or 6.51 production environment into a test environment, and verify this test environment behaves similar to your production environment. We recommend replicating your entire environment, including Warehouse Manager Server, to accurately test the upgrade.
3. Install ShowCase Essbase 7.1 over the test library, and verify there are no problems (make sure your results are accurate and performance time is as expected, for example).
4. Install ShowCase Essbase 7.1 over your existing production library.

With this method, most potential upgrade problems occur in a test environment without impacting your production data warehouse or your end users. Though it takes time to set up and upgrade a test environment before the actual upgrade, the test phase prepares you to handle any difficulties before you begin your production upgrade.

To begin this process, see “Establishing a Test Environment” on p. 5 .

## **Common Upgrade Questions**

### ***What versions of OS/400 does ShowCase Essbase 7.1 require?***

Version 5 Release 1 (V5R1), V5R2, or V5R3.

### ***From which version(s) can I upgrade to ShowCase Essbase 7.1?***

You can upgrade to ShowCase Essbase 7.1 from a STRATEGY 4.5 server or STRATEGY Essbase 6.2, 6.5, or 6.51 servers.

### ***Can I install the ShowCase Essbase 7.1 server on an iSeries running STRATEGY 3.x?***

No. Upgrade from STRATEGY 4.5 or STRATEGY Essbase 6.2, 6.5, or 6.51.

### ***Can ShowCase Essbase 7.1 client components connect to a 4.5, 6.2, 6.5, or 6.51 Essbase Server?***

ShowCase Essbase 7.1 clients can connect to a 6.2, 6.5, or 6.51 Essbase Server. If you are upgrading from 4.5, install the ShowCase Essbase 7.1 server before the 7.1 client components. See Table 1 for server-client compatibility.

**Can 4.5, 6.2, 6.5, or 6.51 client components connect to the ShowCase Essbase 7.1 server?**

Yes. In general, older clients can connect to newer servers, but they cannot access the new server's functions or features. Also, you must use the 7.1 clients to take advantage of the new client features.

**Can I open a ShowCase Essbase 7.1 database outline in an older Application Manager?**

If you open and save a version 7.1 database outline using Application Manager version 4.5, 6.2, 6.5, or 6.51, Essbase deletes any 7.1 features from the outline. To open a 7.1 outline in an older Application Manager, open the outline in read-only mode to ensure you do not lose the version 7.1 features. To open the outline in read-only mode, uncheck Lock file in the application desktop window.

*Note:* You cannot open ASO (Aggregate Storage) outlines in Application Manager. You must use the Administration (EAS) Console.

**Can I revert to older Essbase database files?**

No. You cannot use 7.1 database files with older Essbase versions. If you need to revert to an older version, delete the 7.1 database files and restore older database files from a backup of that version.

**Does ShowCase Essbase Server 7.1 upgrade the Warehouse Manager Server or Warehouse Manager client components?**

No. This version upgrades your ShowCase Essbase Server and clients only. However, we recommend replicating your current Warehouse Manager Server in a test environment to ensure proper upgrade testing.

**ShowCase Essbase 7.1 doesn't upgrade Warehouse Manager Server. Why is Warehouse Manager Server part of the upgrade plan?**

For accurate testing, replicate your entire production environment in a test environment, including your Warehouse Manager Server environment.

## **ShowCase Essbase 7.1 Prerequisites**

*Important:* ShowCase Essbase functions only with the proper prerequisites. Before you upgrade, verify your hardware and software meet the environment requirements in the *ShowCase Essbase Installation Guide*, Chapter 3.

### **Patch Requirements**

To avoid problems unrelated to migration, install the latest ShowCase Essbase patches onto your current 4.5, 6.2, 6.5, or 6.51 version. For the latest patches, log on to the SPSS Technical Support site at <http://support.spss.com> and click Patches.

*Note:* Beginning with Essbase 6.5, SQL Drill-Through is no longer a client option. You must use Essbase Integration Services (EIS) Drill-Through reports. For more information, see Hyperion's Essbase documentation.

## **Server-Client Connection Compatibility**

The following tables list the supported combinations of servers and clients. Any combinations not listed are not supported.

In general, older clients can connect to newer servers but cannot access new functions or features. In some instances, newer clients can connect to older servers. For optimal migration, we recommend all products be at the latest levels.

Table 1-1  
*Server-Client Connection Compatibility*

<b>Server</b>	<b>Client Versions</b>
ShowCase Essbase 7.1 Server	Essbase clients 7.1, 6.51, 6.5, 6.2, 4.5 (Application Manager, add-ins, and so on) Analyzer 6.x or later

Table 1-2  
*Client-Server Connection Compatibility*

<b>Client</b>	<b>Server Versions</b>
ShowCase Essbase 7.1 Client	Essbase Servers 7.1, 6.51, 6.5, 6.2

Table 1-3  
*Essbase-Warehouse Manager Client Compatibility*

<b>Essbase Version</b>	<b>ShowCase Suite Client Versions</b>
ShowCase Essbase 7.1 Server	ShowCase Suite Clients (Warehouse Manager Client, Warehouse Builder, Query/Report Writer) 7.0, 6.5/6.51, 4.5

To test Warehouse Manager Server compatibilities, see the applicable ShowCase upgrade guide at <http://support.spss.com/upgradeinfo/>.

## **Documenting Your Upgrade**

During your upgrade, we recommend documenting the actual steps you take on your iSeries and PCs, problems that occur, and how you resolved those problems. Documenting is useful for several reasons:

- If you reach a point where you cannot proceed without help, SPSS Technical Support can use your documentation to understand the background of the problem.
- Subsequent upgrades are more precise because the steps you took the first time are recorded. If you need to restart steps due to unforeseen circumstances or if you have multiple installations to upgrade, you will be prepared.



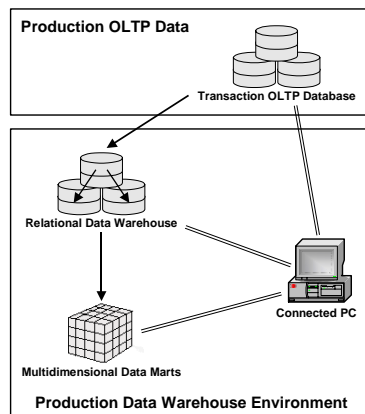
*Notes:*

- When you perform OS/400 operations, use a PC with a terminal emulator (iSeries Access, for example) so you can cut and paste iSeries commands and results into your word processor. This avoids having to retype commands.
- In Windows, to capture a bitmap image of the active window, you can use the key combination **Alt + PrtScn**. To capture the entire display screen, press **Ctrl + PrtScn**. Then paste the bitmap into your word processor.

## Typical Production Scenario

Most data warehouse implementations follow a common architecture in which transaction data is extracted, transformed, and loaded into a data warehouse containing DB2 Universal Database (UDB) for iSeries (hereafter referred to as *DB2 iSeries*) tables and indexes, as in the following figure.

Figure 1-1  
Production Scenario: OLTP and Data Warehouse Environment

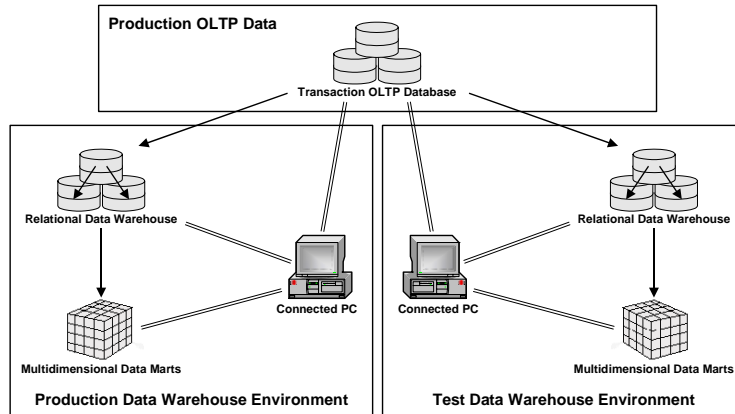


In the previous figure, the arrows represent Warehouse Builder distributions and ShowCase Essbase loading operations. While your primary Warehouse Builder definitions will use source tables from the transaction database, secondary definitions may use source tables from either the transaction database or from the relational data warehouse (the target tables of other distributions). You may have distribution sets that combine data sources from both the transaction system and the data warehouse. Similarly, some of your queries and reports may reference the transaction database directly, while others may reference the data warehouse tables only.

## Establishing a Test Environment

To ensure your upgrade does not impact end users, you should establish a test environment separate from your production environment. Then upgrade the test environment before upgrading your production environment. This section guides you in preparing the test environment. After you have established your test environment, the data warehouse architecture described in the previous section will look similar to the following figure.

Figure 1-2  
Side-by-Side Test and Production Environments



Note the production environment on the left side of the diagram is unaffected by the test environment on the right. The test environment draws source data from the same production transaction database, but it writes data to an isolated relational and multidimensional data warehouse. This structure allows for isolated verification of the upgrade process without impacting the production environment.

## Preparing a Test Environment

This section helps you create your test environment using these general steps:

1. Stop your servers and save your server information. For instructions, see the *ShowCase Administrator's Guide* and the *ShowCase Essbase Administrator's Guide* available on the Support web site at <http://support.spss.com>.
2. Install your current version of Essbase (4.5, 6.2, 6.5, or 6.51) into a test environment. Be sure to install all the Essbase OLAP client components you plan to upgrade.
3. Populate the test environment with copies of your production objects.
4. Install ShowCase Essbase 7.1 “over the top” into the test environment.

To begin this process, see “Step 1: Create a ShowCase Essbase Test Environment” on p. 7 .

Ideally, to create an isolated environment you must separate hardware and software installations. We recommend you designate one or more test PCs for your test environment, separate from your production PCs. If your production PCs are running different operating systems, you may want a separate PC for each of these. Alternatively, you may use a boot manager to allow for more than one operating system on a single PC.

If you cannot allocate a separate iSeries for your test environment, you can install multiple instances of ShowCase Essbase on the same server without conflicting with other servers.

*Note:* Per the licensing agreement, a separate partition is considered a separate server and requires a separate license.

### ***Should I Establish a Test Environment on my Production iSeries or on a Separate iSeries?***

#### **Advantages to using the same iSeries (but not the same installation library) for both production and test:**

- Environmental configuration settings are more likely to match. OS/400 PTF levels, work management configurations, OS/400 system values, and so on, are common in both test and production environments.
- No need to duplicate source tables for queries, reports, or Warehouse Builder definitions on another server.

#### **Disadvantage to using the same server for both environments:**

- The test environment consumes resources such as DASD and/or processor, which may compromise the production environment.

#### **Advantage to using different servers for both environments:**

- Replicating your entire set of Essbase cubes is a simple save and restore operation. Replicating your cubes in a new environment is more difficult when switching to a different Essbase installation library, and separate servers allow both Essbase installations to use the same library name.

## ***Step 1: Create a ShowCase Essbase Test Environment***

*Note:* If you install both ShowCase Essbase and Warehouse Manager (ShowCase) Servers, you must install ShowCase Essbase first. Refer to the *ShowCase Essbase Installation Guide* at <http://support.spss.com> for Essbase installation instructions.

### ***Configure Your ShowCase Essbase IP Address***

If you plan to install your test environment on the same iSeries as your production server, you must establish unique IP addresses for each ShowCase Essbase server. When you installed ShowCase Essbase, you were prompted to enter the IP address the ShowCase Essbase server would use for client requests. If you specified \*ALL, you will not be able to install multiple ShowCase Essbase servers on the same OS/400 until you change this setting to a single, specific IP address.

#### **To determine if your current Essbase server is configured with \*ALL:**

1. At an iSeries command line, type `ESSBASE/SETENVVARS` (where `ESSBASE` is the name of your current Essbase library), and press Enter.
2. Type `WRKENVVAR`, and press Enter.

If the entry for `ESSBASE_IP_ADDR` is `0.0.0.0`, the Essbase server is configured with \*ALL. In this case, if you plan to install your test environment on the same iSeries as your production server, you must reconfigure your production Essbase server to use a specific IP address. To do this, specify an IP address using the `ESSBASE/CFGENVVARS` command. The value must be unique for each Essbase library.

### **Secure a ShowCase Essbase Test Environment Serial Number**

The ShowCase Essbase server does not allow short-term use of the server without a valid license. To install and use a test ShowCase Essbase server, you need a serial number different from your production serial number. You may purchase a development license (at a reduced cost compared to a standard license). Contact your software provider for more information concerning this option.

Alternatively, if you licensed your software from SPSS, you may call 800-521-1337 to obtain a temporary ShowCase Essbase serial number (password) to use during your upgrade process. A ShowCase Essbase 7.1 password is also valid for older Essbase servers before upgrading.

You do *not* need a temporary license in two instances:

- Your test and production Essbase servers are on separate iSeries so each server is using a separate serial number. In this case, you probably have a unique license for each server.
- You run your test server without running your production server so only one serial number is being used (each active server must have a unique serial number).

### **Install Your Current Essbase Server into a Test Library**

If you are installing your test server and production server on separate iSeries, install Essbase (4.5, 6.2, 6.5, or 6.51) into a library with a name matching the Essbase library on your production server, or install into a new library.

*Important:* If you are installing the test server on the same iSeries as your production server, you must choose an Essbase library name different from your production Essbase library name. However, choose a name containing the *same number of characters* as your production server library. For more information, see “Step 3: Replicating Production Objects in a Test Environment” on p. 9.

**Before finishing the test installation, complete the following steps:**

1. To run the production and test Essbase servers simultaneously, enter an Essbase product serial number different from your production serial number.
2. Copy the Essbase configuration file from your production server to your test server. The file name is *CFG*, and the member name is *ESSBASE* in your Essbase installation library.

*Note:* If you are using Relational Storage Manager (RSM), you must migrate your application to use either multidim storage or Hybrid. The RSM storage option is no longer available.

3. To compare environment variable settings to ensure they correspond, at an iSeries command line type `ESSBASE/DSPESSENV INFO(*ALL)` (where *ESSBASE* is the name of your current production Essbase library), and press Enter. Press the Page Down key until you see a line at the bottom of the screen that reads “Essbase/400 Server attributes.” Place your cursor on the message, and press F1. Compare the server attributes in the production environment with those in the test environment.
4. After installing the test server libraries, apply the appropriate Essbase 4.5, 6.2, 6.5, or 6.51 patch to each server. To get the latest patches, log on to the SPSS Technical Support site at <http://support.spss.com> and click Patches.

*Notes:*

- If you are using Essbase Integrated Security, you can use the same groups in both servers if both test and production servers are on the same iSeries. If you are installing Essbase on a separate test iSeries, you must create the necessary groups.
- Do not create any Essbase applications at this point. In a subsequent step, you will replicate some or all of your existing production Essbase applications on the test server.

## **Step 2: Create a Warehouse Manager Test Environment**

Even though you are not upgrading the Warehouse Manager Server, we recommend replicating your entire production environment in a test environment for accurate testing. Warehouse Manager instructions are provided to help you set up a complete testing environment.

*Note:* Creating a Warehouse Manager test environment is required only if your test and production environments are on separate iSeries servers.

### **Install Your Current Warehouse Manager Server into a Test Library**

When you install your current Warehouse Manager Server version (4.5, 6.5/6.51, or 7.0) into your test environment, choose installation options matching your production environment. You can use side-by-side comparisons of Warehouse Manager Client screens to ensure settings are compatible after installation. Adjust the settings in the test environment to match settings in your production environment as appropriate. All the *.cfg* file settings should match.

## **Step 3: Replicating Production Objects in a Test Environment**

The following sections explain how to copy some or all of your production objects to your test environment.

### **Replicating Essbase OLAP Server Production Objects to a Test Environment**

To replicate your production applications (or a subset of them) on your test server, use the *SAV* and *RST* commands. If you choose to replicate only a subset of your applications, you can omit some applications on either the *SAV* command or the *RST* command. If you use a regular backup image in the replication, you will likely subset on the *RST* command; otherwise, it will save time to subset on the *SAV* command. This also minimizes the size of the save image.

You can find more detail on saving and restoring Essbase in the *ShowCase Essbase Administrator's Guide* available on the Support web site at <http://support.spss.com>.

**To replicate the objects:**

1. Stop the production Essbase server.
2. At an iSeries command line, use a *SAV* command such as the following to save some or all of your applications from your production Essbase server. In the following sample command, *ESSBASE* is your server library and *App1* and *App2* are names of applications that will not be replicated.

```
SAV DEV(path to save device or save file) OBJ('/ESSBASE')
('/ESSBASE/app/App1' *OMIT) ('/ESSBASE/app/App2' *OMIT)
```

3. Restart the production Essbase server.
4. If you created any applications in your test server, delete them using Application Manager or Esscmd.
5. Stop the test Essbase server.
6. Use an RST command such as the following to restore some or all of your applications. If the installation library names for your test and production servers are the same (that is, if you used different iSeries for your test and production environments), skip this step, and skip step 7 as well.

*Note:* If you are not replicating all your applications, and you used the \*OMIT option in the SAV step above, do not use the lines containing the \*OMIT option in this step. In the following sample command, ESSBASE is your server library, ESSTEST is the new directory, and App1 and App2 are the names of applications that will not be loaded.

```
RST DEV(path to save device or save file) OBJ('/ESSBASE')
*INCLUDE '/ESSTEST' ) ('/ESSBASE/app/App1' *OMIT) ('/ESSBASE/app/
App2' *OMIT) )
```

7. To update the test server installation library, use the “Change Essbase Library” (CHGESLIB) utility:

- ▶ Add your Essbase Server library to your library list.
- ▶ Run the following iSeries command:

```
CALL CHGESLIB
```

- ▶ When prompted, enter the name of the Essbase installation library for which the SAV was done.
- ▶ When prompted, enter the name of the Essbase installation library for which the RST was done.

*Note:* The source and target directories must contain the same number of characters.

When the utility has finished processing, your test server installation library will be updated.

8. Delete the contents of the *Essbase/bin/applinks* directory. To do this, type the command `RMVNLNK '/ESSTEST/BIN/APPLINKS/*'` (where ESSTEST is the new directory).
9. Start the Essbase test server.
 

If you restored a subset of your applications, you may receive error messages in Application Manager when you attempt to work with applications you did not restore.
10. Open each rule file to verify the source tables and views referenced in the SQL statements correctly correspond to the tables in your test environment data warehouse.
11. If you used non-SQL references, you may need to update Esscmd or MaxL scripts to reference the test environment tables or files.

### **Replicating Essbase Integration Server (EIS) Production Objects to a Test Environment**

If one or more of your Essbase OLAP databases were created using Essbase Integration Services (EIS), you must follow the steps below to replicate the Integration Server objects into a test environment.

You can find more details, such as information on saving and restoring, in the *ShowCase Essbase Administrator's Guide*.

#### **To replicate the objects:**

1. Ensure the Essbase Integration Services (EIS) Server and OLAP Server are running (both the test server and the production server).
2. From a Windows PC, use the Essbase Integration Services console to create an OLAP metadata catalog on the test server.
3. Connect to your production server (running Essbase 6.5 or 6.51).
4. In the Essbase Integration Services (EIS) Console, from the File menu, select XML Import/Export. On the Export tab, select each OLAP model and metaoutline and export each one to a unique *.xml* file.

*Note:* You can save the *.xml* files to your local drive or to the iSeries integrated file system (IFS).

5. Disconnect from your production server.
6. Connect to your test servers (running Essbase 6.5 or 6.51). You must connect to both the EIS Server and the OLAP Server.
7. In the Essbase Integration Services (EIS) console, from the File menu, select XML Import/Export. On the Import tab, select each OLAP model and metaoutline you exported previously and import each one to the test environment.
8. In the Essbase Integration Services (EIS) console, from the File menu, select Open. On the Existing tab, open each OLAP metaoutline, one at a time. Once a metaoutline is opened, from the Outline menu, select Member and Data load. Specify an application and database name. This creates an Essbase application/database in your test environment.

Repeat this process for each database.

### **Transferring Warehouse Manager Objects from Production to Test**

*Note:* This section is required only if your test and production environments are on separate iSeries servers. Use the following steps to replicate all or a subset of your objects from the production Warehouse Manager Server on the test server:

1. Be sure all end users have disconnected from the Warehouse Manager Server.
2. Stop the production Warehouse Manager Server. For instructions, see the *ShowCase Administrator's Guide*, Chapter 2, "Starting and Stopping the Servers."
3. Save production server library information with the command `SERVERLIB/SAVSRVRINF` (where `SERVERLIB` is the name of your Warehouse Manager Server production library).\*\*

4. Restart ShowCase TCP/IP for your production server.
5. Stop the test servers.
6. Restore the information from the production library to the test server library with the command `SERVERLIB/RSTSRVRINF`.
7. Start the test server.

\*\*For information on the `SAVSRVRINF` and `RSTSRVRINF` commands, see the *ShowCase Administrator's Guide*

*Important:* If you have Warehouse Builder definitions, you may need to adjust the libraries and/or table names in the transferred test definitions so target tables generated by the test environment are distinct from those generated by the production environment. To do this, establish a test library for each target library referenced in your definitions. Secondary Warehouse Builder definitions may need source table names or libraries adjusted in a similar manner. To adjust them, open Warehouse Builder, connect to the test server, and with no objects open, select Definition Properties from the Tools menu. For more information about this dialog, see the Warehouse Builder online help.

#### **Step 4: Install Your Current Version of ShowCase Suite (STRATEGY) on Test PCs**

Install your current version of STRATEGY (4.5 or 6.5/6.51) on one or more test PCs, and configure ODBC connections to the test servers. If you need additional information, use the *ShowCase Installation Guide*, Chapter 6. Information on configuring server connections is in the *ShowCase Essbase Administrator's Guide*, Chapter 3.

*Notes:*

- If you are upgrading from STRATEGY Essbase 6.2, you should install 4.5 client components and then 6.2 client components.
- Apply patches at the same level as on your production PCs. For the latest patches, log on to the SPSS Technical Support site at <http://support.spss.com/> and click Patches.

#### **Step 5: Verify Your Test Environment**

You should now have a working test environment, ready to perform tests to ensure your test environment behaves like your production environment. It is important to verify the test environment before upgrading. If you upgrade without testing and problems occur, it will be difficult to determine if the problem is a result of the test environment setup or the upgrade.

- If your test and production environments are on the same server, use a test user profile without access to the production data warehouse to ensure the test environment is correctly adjusted to refer to the test data warehouse.
- If you have not yet made use of some features in a production environment, verify security settings are in place and operational. You can adjust them in Warehouse Manager Client or Essbase Application Manager.



- For Warehouse Manager Server, make sure you can run Warehouse Builder distributions, queries, reports, views, and so on. Verify you can create new objects and change existing objects.
- For Essbase Server, make sure you can start, end, and load applications and databases as usual. You should not have to modify load rules or outlines. Make sure your calculation behaves properly in accuracy and performance.

## ***Saving the Test Environment***

Saving the test environment ensures you can restart if problems occur during your test upgrade. To properly back up your test environment, see the *ShowCase Administrator's Guide* and *ShowCase Essbase Administrator's Guide*.

## ***Upgrading the Test or Production Environment***

At this point, you are ready to test the upgrade process with your environment. If problems arise, first resolve them and then retest to avoid introducing other problems. This section describes how to upgrade to ShowCase Essbase 7.1. You will use this section twice: once for the test environment and once for your production environment.

If you have not already done so, apply the appropriate ShowCase Essbase Server patches to your environment. For the latest patches, log on to the SPSS Technical Support site at <http://support.spss.com> and click Patches.

### ***Step 1: Stop Servers***

1. To stop the Warehouse Manager Server, use the iSeries command `SERVERLIB/ENDSCSVR` where `SERVERLIB` is the name of the library where the servers are installed.
2. To stop the Essbase servers, use the iSeries command `ESSBASE/ENDESSSVR` where `ESSBASE` is the name of your current Essbase library. Supply a user ID and password.

### ***Step 2: Back Up Server Information***

*Important:* Disaster recovery backups could prevent data loss. Always save server information before you install over any version. This way, if there are problems with the installation, you can restore your data from a backup. To back up your server environment, see the *ShowCase Administrator's Guide* and the *ShowCase Essbase Administrator's Guide* available on the Support web site at <http://support.spss.com>.

### ***Step 3: Install ShowCase Essbase 7.1 Server***

1. After stopping the servers, install ShowCase Essbase 7.1 into the existing Essbase libraries. For step-by-step server installation instructions, use the *ShowCase Essbase Installation Guide*, Chapter 5.

2. Check for any available server patches. For the latest patches, log on to the SPSS Technical Support site at <http://support.spss.com> and click Patches.
3. After installation, start your server(s). For information on starting the servers, see the *ShowCase Essbase Administrator's Guide*, Chapter 2.

#### **Step 4: Install ShowCase Essbase 7.1 onto PCs**

Before upgrading to 7.1, be sure the corresponding Essbase OLAP client components are installed on PCs. Follow instructions in the *ShowCase Essbase Installation Guide*, Chapter 6. Use the following information as a guide.

##### **Installing on Network PCs**

There are two ways to upgrade in your Local Area Network (LAN):

**Method 1:** Install from CD directly onto user PCs.

**Method 2:** Install to the network so users can install or run 7.1 on their PCs.

See the *ShowCase Essbase Installation Guide*, Chapter 3.

*Note:* ShowCase Essbase 7.1 does not support “silent” installations.

#### **Step 5: Start Applications**

When pre-7.1 applications are started for the first time after Essbase 7.1 is installed, some application and database files are processed to convert EBCDIC-encoded strings to ASCII-encoded strings for compatibility with the 7.1 server. The process creates temporary copies of those files and requires that your system have additional available space — the size of your largest Essbase database. This typically happens no more than two times.

Also, the process will take extra time. Plan for approximately 4 to 8 minutes for each 2 GB of data. Results may vary depending on system configuration. Because of this, we recommend starting your applications as part of the upgrade process.

#### **Step 6: Upgrade your EIS Catalog**

If you are upgrading Essbase Integration Server 6.5 or 6.51, the catalog must be upgraded before you can connect to the Integration Server using a 7.1 EIS client. Update (or migrate) your catalog with the following instructions. Note that if you are at the latest 6.51 patch level (6.51.060 or later), no migration is required.

1. Open the EIS Console.
2. From the Tools menu, select Create Catalog.
3. If a catalog does not exist, it will create a new catalog. If a 6.5 or 6.51 (pre-6.51.060) catalog is detected, it will be migrated to version 7.1.

***Step 7: Verify the 7.1 Upgrade***

Be sure ShowCase Essbase features work correctly in your environment. You should verify:

- All Essbase applications start properly.
- Essbase calculation runs properly.
- Essbase applications return valid reports.
- If you are also using Warehouse Manager and Warehouse Builder, verify sets and definitions work properly.

If you have just completed the “test” upgrade using your test environment, review your work. Ensure you understand any difficulties you encountered during the test upgrade and how to resolve those difficulties when you upgrade the production environment. Once you have a complete upgrade plan, upgrade your production environment, beginning at “Upgrading the Test or Production Environment” on p. 13.