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# Hyperion Essbase™

Version 5.0.2

## Installation Notes

**HYPERiON®**

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# Introduction

Welcome to Hyperion Essbase™ *Installation Notes*.

This book helps you install the Hyperion Essbase OLAP Server, sample applications, Hyperion Essbase Application Manager, Hyperion Essbase Spreadsheet Add-in, Hyperion Essbase API, and Hyperion Essbase SQL Interface. It also provides information about hardware and network-protocol requirements.

This introduction contains the following sections:

- “Who Should Read This Book” on page xv
- “What’s in This Book” on page xvi
- “What You Should Know Before You Start” on page xvi
- “Conventions Used in This Book” on page xvii
- “Related Publications” on page xvii
- “Viewing Essbase HTML Documents” on page xviii

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## Who Should Read This Book

This book is for Essbase System Administrators who need to install and configure Essbase server software on a Windows NT, UNIX, Windows 95, or Windows 98 platform. It also helps Essbase System Administrators set up sample applications, work with network protocols, and help client users install client software.

This book is also for client users who need to install client software.

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## What's in This Book

This book describes the following:

- How to install server software from the Essbase CD-ROM to Windows NT, UNIX, Windows 95, and Windows 98 servers
- How to upgrade or register your server when you license new options or additional ports
- How to set up the sample applications for client users
- How to install Application Manager and Spreadsheet Add-in software on a network or local drive
- How to install Application Manager and Spreadsheet Add-in software from the network or CD-ROM
- How to install the API software
- How to configure your PC for Personal Essbase
- How to install the SQL Interface software
- Information about network protocols

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## What You Should Know Before You Start

Before you begin, make sure you have all the software, documentation, and Registration Card in the Essbase Pack. Then do the following:

1. Read the *Start Here* booklet.
2. If you are upgrading from Version 4.x, determine whether you will be installing on a new machine or the existing machine. If on the same machine, determine whether you will be installing in the existing directory or a new directory.
3. Know your server's operating system and your installed network protocol.
4. Ensure that you have the required disk space and memory for the Essbase products you plan to install, as documented in the *Start Here* booklet.

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## Conventions Used in This Book

This book uses several formatting styles to indicate actions you should take or types of information you need. The following table lists each document convention.

*Table i, Document Conventions*

Example	Description
1, 2, 3	Numbered items indicate procedures to follow in a specific order.
•	Bulleted items indicate a list of related items.
Product	Dimension names and member names appear in This Font.
\ESSBASE	Names of files, directories, specific text you must type, and keyboard keys appear in This Font.
<b>Essbase System Login</b> dialog box	Names of dialog boxes and their controls, such as buttons, text boxes, and list boxes, appear in <b>boldface</b> .
<i>Installation Notes</i>	Titles of books appear in <i>italics</i> . Italics also indicate important terms and special emphasis.
File Open	The vertical bar ( ) indicates a menu followed by an individual menu command in that menu.

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## Related Publications

In addition to *Installation Notes*, the Essbase documentation set includes:

- The *Start Here* booklet, which provides late-breaking information as well as the most important migration and features information for this version of Essbase.
- The *Database Administrator's Guide*, which explains the architecture of Essbase, how to design databases, how to design calculations, how to set up Essbase security, how the database is stored, and how to optimize Essbase.
- The *Quick Technical Reference*, which provides syntax for Essbase functions, macros, calculation commands, report commands, ESSCMD commands, and configuration file settings.
- The Application Manager online help file, which explains how to use the Application Manager user interface.
- The online *Technical Reference* in your DOCS directory, which contains a list and description of Essbase functions, macros, calculation commands, report commands, ESSCMD commands, and configuration file settings.



- The *Spreadsheet Add-in User's Guide for Excel*, which explains how to use the Essbase Spreadsheet Add-in features with Microsoft Excel for Windows. This guide is provided in the \ESSBASE\DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from WWW.ADOBE.COM.
- The *Spreadsheet Add-in User's Guide for 1-2-3*, which explains how to use the Essbase Spreadsheet Add-in features with Lotus 1-2-3 for Windows. This guide is provided in the \ESSBASE\DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from WWW.ADOBE.COM.
- The Spreadsheet Add-in online help files, which explain how to use the Spreadsheet Add-in, and provide all the spreadsheet macros and VBA functions.
- The online *API Reference* in your DOCS directory, which contains a complete listing and description of functions available through the Essbase API.
- The *SQL Interface Guide*, which contains information on how to set up your systems to load data via the Essbase SQL Interface. This guide is provided in the \ESSBASE\DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from WWW.ADOBE.COM.
- The *SQL Drill-Through Guide*, which contains information about accessing detail-level data stored in a remote SQL database. This guide is provided in the \ESSBASE\DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from WWW.ADOBE.COM.

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## Viewing Essbase HTML Documents

The API and Application Manager products include the API Reference and Technical Reference documentation in HTML format. To view it, you must have:

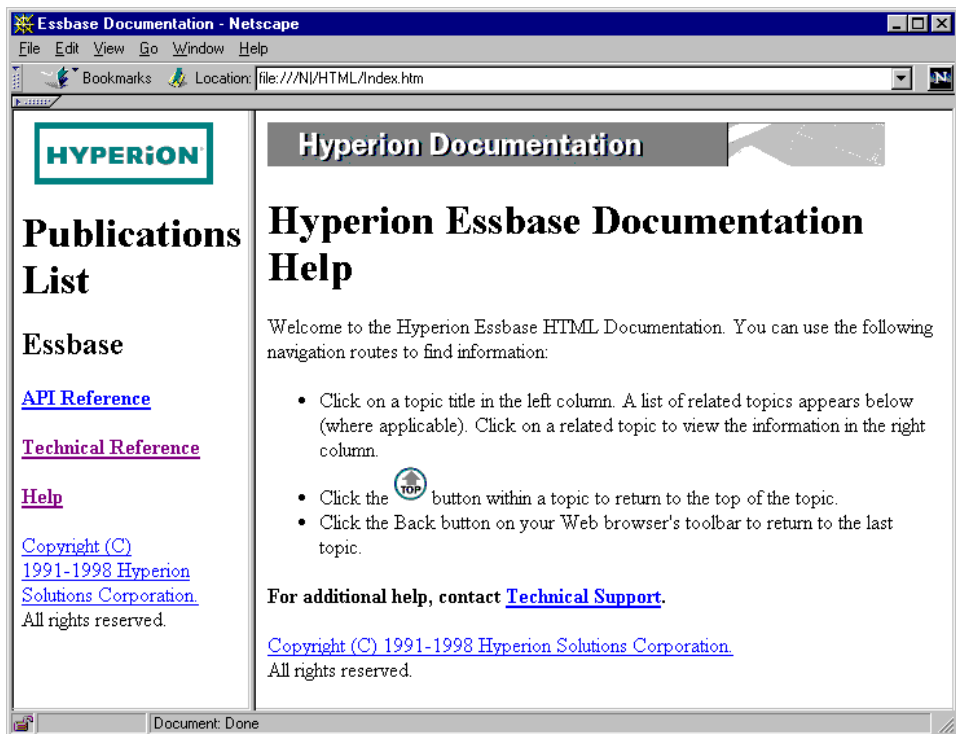
- The API or Application Manager installed on your server or client machine
- A Web browser such as Netscape Navigator (Version 2.0 or later) or Microsoft Internet Explorer (Version 3.01 or later) installed on your local computer

## To View an Essbase HTML Document

1. Start your browser.
2. Open \ESSBASE\DOCS\INDEX.HTM wherever Essbase API or Application Manager is installed (either on the Local Area Network or your local computer).  
For example:

C:\ESSBASE\DOCS\INDEX.HTM

From the INDEX.HTM page, you can link to information about the Essbase API, calculation commands, report writer commands, functions, ESSCMD commands, and ESSBASE.CFG settings.



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## Installing a Web Browser

We recommend using Microsoft Internet Explorer (Version 3.01 or later) or Netscape Navigator (Version 2.0 or later) to view Essbase HTML documents. If you have another Web browser and are connected to the Internet, you can download them from the Web sites shown in this table.

*Table ii, Web Browsers*

<b>Product</b>	<b>Web Site</b>
Microsoft Internet Explorer	<a href="http://www.microsoft.com/ie/download/">www.microsoft.com/ie/download/</a>
Netscape Navigator	<a href="http://home.netscape.com/download/">home.netscape.com/download/</a>

Microsoft Internet Explorer is included with Windows 95 and Windows 98. Netscape Navigator can be downloaded for free from Netscape's Web site. You can also purchase either browser from your software dealer.

**Notes:**

- Once you obtain a Web browser, you do not need to have Internet connectivity to read Essbase HTML documents, because they are installed on your local or network drive.
- You can telephone Microsoft at (800) 426-9400 or Netscape at (650) 937-2555.
- You are responsible for the legal licensing of these browsers.

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# Chapter 1

# Product Components and Software Registration

Welcome to the installation information for Hyperion Essbase. Essbase operates in a client-server environment. When you set up the Essbase system, you create an OLAP (On-line Analytical Processing) Server and configure clients to access the server.

This chapter contains the following sections:

- “Essbase Product Components” on page 1-1
- “Software Registration” on page 1-3
- “Recommended Installation Steps” on page 1-5

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## Essbase Product Components

Essbase product components include the base system components and optional, add-on products, which you can license separately.

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### Base System Components

The base system contains the following items:

- This book, *Installation Notes*.
- The *Start Here* booklet, containing information you should read before installing Essbase, especially if you are migrating from Version 4.x.
- The Hyperion Essbase OLAP Server software, containing the Essbase server, sample applications, and set-up program.
- A Software Registration Card, containing the license number of your server.
- The Hyperion Essbase Application Manager software, containing the Essbase administration tool called Application Manager.

- The *Database Administrator's Guide*, online *Technical Reference* in your DOCS directory, and *Quick Technical Reference*, which describe how Essbase works, how to use the Application Manager, and how to build your Essbase application and database.
- The Hyperion Essbase Spreadsheet Add-in software for the Spreadsheet Add-in platform of your choice, which enables your spreadsheet to work with the Essbase server.
- The online *Spreadsheet Add-in User's Guide*, which describes how to use your spreadsheet to retrieve and work with Essbase data. This guide is provided in the \ESSBASE\DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from WWW.ADOBE.COM.

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## Add-On Products

Essbase has several add-on options that are an integral part of its product line. You license them separately. They include the following:

- Hyperion Essbase SQL Interface
- Hyperion Essbase Currency Conversion
- Hyperion Essbase Spreadsheet Toolkit (including VBA for Excel for Windows)
- Hyperion Essbase Partitioning
- Hyperion Essbase SQL Drill-Through
- Hyperion Essbase Application Programming Interface (API)

For more information, contact your software provider.

**Note:** Your software license number enables access to these products.

Essbase also has several products that are independent of the Essbase product line. You also license them separately. They contain their own installation and documentation, and include the following:

- Hyperion Integration Server
- Hyperion Web Gateway
- Hyperion Objects
- Hyperion Essbase Adjustment Module

For more information, contact your software provider.

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## Software Registration

Each Essbase installation requires a license number. The license number is enclosed on the Essbase Software Registration Card and is unique for your server license. Your license number is encoded to identify and enable the options and Essbase capacity that you licensed. The card lists all these options and the number of available ports available.

**Note:** Keep this card in a secure place for future reference.

When you receive your initial software shipment, verify that the correct options and number of ports are available. If the shipment does not contain the correct options, contact your software provider.

When you license additional Essbase products or extend the Essbase capacity, a new license number will be given to you to reflect the additional options.

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## Entering License Numbers

When you install the Essbase server, SQL Interface, API, or client, you will be asked for your license number. Enter the license number exactly as it appears on your Software Registration Card—as a sequence of sixteen alphanumeric digits, then a single hyphen, then the remaining digits.

The license number you enter is embedded in the following Essbase system files and validated each time you use Essbase:

- `essbase.exe`
- `esssvr.exe`
- `essadmin.exe`
- `essexcln.xll`
- `lsx123.dll`

**Note:** If you use the Hyperion Essbase CD-ROM to install only the Hyperion Essbase Application Manager, Hyperion Essbase Spreadsheet Add-in, or Hyperion Essbase Runtime Client, entering a license number is optional. If you don't enter a license number, Essbase installs these client products pre-registered with a valid license number.

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## Upgrading Your Server License

As you implement your Essbase application, you might need to purchase additional products or increase the number of purchased ports. When this occurs, your software provider will give you a new license number.

Several Essbase options are enabled by license number. For them, you only need to register the new license number. You don't need to reinstall the server software.

The following options require only that you register a new license number:

- Currency Conversion
- Partitioning
- Spreadsheet Toolkit

Some options, or products, require a separate software installation and a new license number. In this case, you need to install the software, provide the license number during installation, and update the Essbase server with the new license number. You don't need to reinstall the server software unless it is provided to you by your software provider.

The following options, or products, require a separate installation and a new license number:

- API
- SQL Drill-Through
- SQL Interface

To register a new license number:

1. Stop the Essbase server. If you are unsure how to do this, see Chapter 44, *Running Essbase, Applications, and Databases*, in the *Database Administrator's Guide*.
2. Run the registration utility. On Windows NT, Windows 95, and Windows 98, the utility is called `REGISTER.EXE`, and resides in the `\ESSBASE\BIN` directory on the server. On UNIX platforms, the utility is called `REGISTER` and resides in the `/essbase/bin` directory on the server.
3. Enter the new license number.
4. Start the Essbase server.

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## Recommended Installation Steps

Before installing Essbase, you should establish a working client-server environment based on a Named Pipes Services or TCP/IP protocol. Essbase clients cannot communicate with the Essbase server if the environment is not properly established. For information on supported network configurations, see Chapter 14, Network Configuration Notes.

Install the Essbase system components in the following order:

1. The Hyperion Essbase OLAP Server software and the sample applications on the server machine.
2. The Application Manager on a client machine.
3. The Spreadsheet Add-in on a client machine.

*Note:* The sample applications contain examples that are useful when learning to use Essbase. You should install the sample applications to ensure these learning aids are available.

Be sure that you read the README .TXT file included with your Essbase installation. You can find this file in the \ESSBASE\BIN directory after installation is complete.



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## Chapter 2

## CD-ROM Installation

This chapter tells you, the Essbase System Administrator, how to install server software from the Hyperion Essbase CD-ROM.

This chapter also tells you how to install client software to a network drive from the Hyperion Essbase CD-ROM. This method enables your client PC users to install client software from the network drive.

This chapter also tells you, the client PC user, how to install client software on your client PC's hard drive, from the Hyperion Essbase CD-ROM.

*Note:* Installing software from an installation disk set is no longer supported.

This chapter contains the following sections:

- "About Installing Server and Client Software" on page 2-2
- "Before You Install from CD-ROM" on page 2-4
- "Network Protocol Files" on page 2-5
- "Security" on page 2-6
- "Installing Server Software from CD-ROM" on page 2-6
- "Installing Client Software from CD-ROM" on page 2-13

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## About Installing Server and Client Software

You can install Essbase server and client software from one CD-ROM, based on your Essbase license number. The CD-ROM includes Windows 95 or Windows 98, Windows NT, Solaris, AIX, and HP-UX installations.

You can also install client software from a network drive.

Some of the new features in Hyperion Essbase Version 5.0.x require new license numbers. See Chapter 1, *Product Components and Software Registration*, for information on the software registration process.

Installing the Hyperion Essbase API from the CD-ROM, on all supported platforms, is treated separately. See Chapter 11, *API Installation*.

If you install Essbase Version 5.0.x in the same directory as 4.x, which is recommended, first back up your 4.x files to another directory so you have them if there are problems installing 5.0.x. Also see the *Start Here* booklet for important information on migrating your applications.

---

## Version Compatibility

We recommend that you install the Version 5.0.2 server with Version 5.0.2 clients. Client products include the Application Manager, Spreadsheet Add-in, and SQL Drill-Through. Version 5.0 and 5.0.1 clients will work with the Version 5.0.2 server, but with feature limitations. For example, you cannot take advantage of Version 5.0.2's Partitioning and Outline Synchronization improvements if you use Version 5.0.1 Application Manager with the Version 5.0.2 server.

Using versions of the client that are later than the server version is not recommended or supported.

**Warning:** If you install one Version 5.0.2 client, you should make all your clients (on the same machine) Version 5.0.2. This includes the Application Manager, Spreadsheet Add-in, and SQL Drill-Through. Version 5.0.2 clients share .DLL files that may not work with earlier clients.

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## Installing Client PC Software: the Administrator's Options

As a Hyperion Essbase Administrator, you can enable your client PC users to install client software (the Hyperion Essbase Application Manager, Hyperion Essbase Spreadsheet Add-in, Hyperion Essbase Runtime Client, and Hyperion Essbase SQL Drill-Through) in the following ways:

- From a network drive. You do this if you have many client users, or if it is difficult for your client users to share the CD-ROM. See "Installing the Application Manager, Spreadsheet Add-in, or Runtime Client to a Network Drive" on page 2-14 in this chapter for more information on installing client software to a network drive, so your client users can install it from there.
- From the CD-ROM. You might do this if you have only a few client users who can easily share the CD-ROM. See "Installing Client Software to Your Client PC's Hard Drive" on page 2-20 in this chapter for more information on installing client software from CD-ROM to any supported client platform.

**Note:** On UNIX, you cannot use the installation program to install client software to a network drive.

Installing the SQL Drill-Through to a network drive, so client users can install it from a network drive, requires special procedures. See "Installing SQL Drill-Through to a Network Drive" on page 2-18 in this chapter.

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## Installing Client PC Software: the Client PC User's Options

As the client PC user, you can install client software (the Application Manager, Spreadsheet Add-in, SQL Drill-Through, and Runtime Client) to your client hard drive in the following ways:

- You can install the client software to your client PC's hard drive, and run it there. You can install this way from a network drive or from the CD-ROM.
- You can set up your client PC's operating environment to run the client software from a network drive. You can install this way from the network drive or from the CD-ROM.

See the individual client installation chapters for more instructions on installing from a network drive—Chapter 6, Application Manager Installation, Chapter 8, Spreadsheet Add-in for Excel Installation, and Chapter 9, Spreadsheet Add-in for 1-2-3 Installation.

---

## Before You Install from CD-ROM

Before you install:

- See the *Start Here* booklet for information on software requirements and platform support.
- Read Chapter 1, Product Components and Software Registration, which describes the software registration process.

To successfully install Version 5.0.2 clients:

- Install all your clients in the same directory. This includes the Application Manager, Spreadsheet Add-in, SQL Drill-Through, and Runtime Client.
- If you install one Version 5.0.2 client, you should make all your clients on the same machine Version 5.0.2 as well. This includes the Application Manager, Spreadsheet Add-in, SQL Drill-Through, and the Runtime Client. See “Version Compatibility” on page 2-2.

**Warning:** Version 5.0.2 clients share .DLL files that may not work with earlier clients.

**Note:** Move your existing client worksheets and scripts to the new location.

The default directory for all installations is C:\ESSBASE (or /home/essbase on UNIX), just as it was for Essbase 4.x and 5.x. Accepting the default directory is recommended.

Unless you choose to update them yourself, the installation program updates your environment settings to point to the new Essbase directory.

If you install Personal Essbase on Windows NT, Windows 95, or Windows 98, or if you install both server products and client products on a Windows NT machine, you must install the server products and the client products to the same Essbase directory. Because Essbase uses the \$ARBORPATH environment variable to find the Essbase directory, \$ARBORPATH must point to the same directory for both server and client products.

When installing on a Personal Essbase machine (either Windows NT, Windows 95, or Windows 98), you must install both the 5.0.2 client and the 5.0.2 server. A 5.0 or 5.0.1 client/5.0.2 server configuration is not recommended.

On Windows NT, you can install more than one server product at the same time. On UNIX, you must install each server product separately. However, on all platforms, you should install the Essbase server, update your environment settings, and verify the server is working before you install SQL Interface.

If you install Version 5.0.2 of SQL Drill-Through to route requests through the Essbase server, also install Version 5.0.2 of SQL Interface.

On Windows NT, you can install client products at the same time you install server products. However, on all platforms, you should install SQL Interface, update your environment settings, and verify that SQL Interface is working, before you configure SQL Drill-Through to route requests through the Essbase server.

If you install Personal Essbase for Windows 95 or Windows 98 on a machine with a Windows NT dual-boot configuration, and if Essbase for Windows NT is also installed on the machine, do not install Personal Essbase for Windows 95 or Windows 98 in the Windows NT Essbase directory. From within each operating system, specify the `$ARBORPATH` and `PATH` settings for the Essbase program files for either Windows 95/98 or Windows NT.

If you install Essbase Version 5.0 in the same directory as 4.x, your previous security settings are retained in `ESSBASE . SEC`. When you first start the Essbase Agent, `ESSBASE . EXE`, after installing Version 5.0.x, the Agent converts Version 4.x `ESSBASE . SEC` to Version 5.0 format. The new format accommodates the additional database settings.

If a program file or application is not available for the chosen language, English is installed as the default.

---

## Network Protocol Files

Network protocol files implement the TCP/IP or Named Pipes protocol you select when you install Essbase server or client software. The network protocol for 32-bit clients, such as Excel 97 or Lotus 1-2-3 97, is `ESSNET . DLL`. The server software also has an `ESSNET` library file. Network protocol files reside in the `BIN` directory with the Essbase program files.

If you have more than one Essbase server machine, and the server machines use different network protocols, you must install your client software in separate directories for each network protocol.

For example, you could install a Spreadsheet Add-in for a Named Pipes server in `N: \ESSBASE`, and a Spreadsheet Add-in for a TCP/IP server in `T: \ESSBASE`. The `ESSNET . DLL` file would be different for the two installations.

---

## Security

The `ESSBASE.SEC` file stores information about users, passwords, groups, privileges, applications, and their corresponding directories. Each time you successfully start the Essbase Agent, `ESSBASE.EXE` (`ESSBASE` on UNIX platforms), Essbase makes a backup copy of the security file as `ESSBASE.BAK`. If you attempt to start the Agent and can't get a password prompt or your password is rejected, Essbase doesn't make a backup file. You can restore from the last successful startup by copying `ESSBASE.BAK` to `ESSBASE.SEC`. Both files are in the `BIN` directory where you installed the Essbase server.

---

## Installing Server Software from CD-ROM

You can install server software (the Essbase server, sample applications, and SQL Interface) from the Hyperion Essbase CD-ROM to any supported server platform.

See the individual server installation chapters listed for more information on installing specific server software. For installing the Essbase server, see Chapter 3, Windows NT Server Installation, Chapter 4, Personal Essbase Installation, and Chapter 5, UNIX Server Installation. For installing the sample applications, see Chapter 7, Sample Applications. For installing SQL Interface, see Chapter 12, SQL Interface Installation.

---

## Installing Software on Windows Servers

To install server software from the CD-ROM to a PC running Windows NT, Windows 95, or Windows 98, do the following:

1. Insert the CD-ROM into your CD-ROM drive.
2. Run `SETUP.EXE` from the root directory of the CD-ROM.
3. Follow the prompts, and provide the information requested.

*Note:* To cancel installation at any time, click the **Cancel** and **Exit Setup** buttons.

4. When prompted, enter your license number exactly as it appears on your registration card. See Chapter 1, Product Components and Software Registration, for more information on registration.
5. When the **Essbase Products** dialog box appears, click on **Server products** in the list box on the left.

The individual server products appear in the list box on the right.

**Note:** The installation program displays the product choices for your license agreement and operating system.

6. Click to the *left* of **Server products** to select all your server products, or click to the *left* of just those server products you want to install.

A check mark appears next to each server product you select.

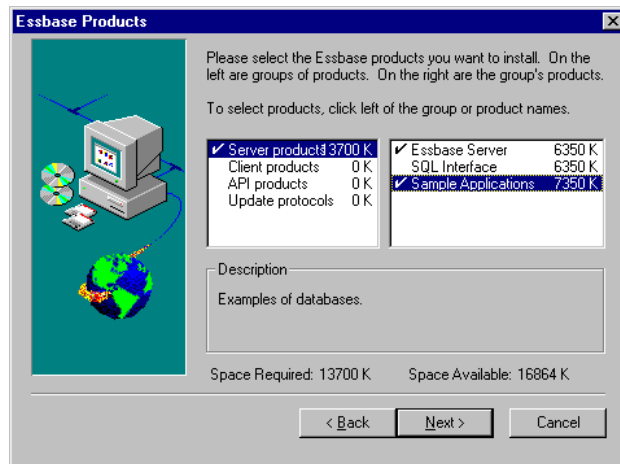


Figure 2-1. Selecting Server Products

7. When you finish selecting, click **Next**.

8. In the **Server Destination Directory** dialog box, specify the directory where you want to install the server products you have selected, and click **Next**.

**Note:**

The default directory is C:\ESSBASE. Click **Browse** to select or type another directory. If you type a directory that does not exist, the installation program will create it for you.

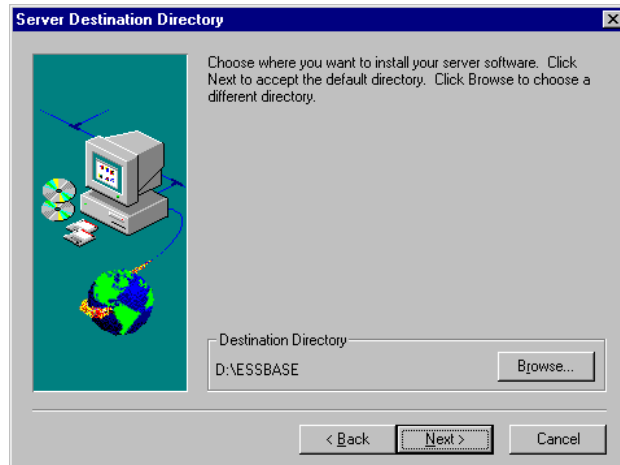


Figure 2-2. Choosing Where to Install Server Products

9. In the **Network Protocol** dialog box, select your network protocol, and click **Next**.
10. In the **Update Environment?** dialog box, answer whether you want the installation program to update your environment, and click **Next**.

**Note:**

If you don't want the installation program to update your environment, then you must update it yourself. See Chapter 3, Windows NT Server Installation, "Manually Updating Environment Settings" on page 3-6, or Chapter 4, Personal Essbase Installation, depending on your platform.

11. In the **Confirm Choices** dialog box, review your selections for installation. Click **Next** to accept the list, or **Back** to modify the list.
12. In the **README** dialog box, answer whether you want to view the Readme file.
13. When the message appears stating the installation was successful, do one of the following:
  - On Windows NT, log out and log in again, or reboot your PC, to allow any environment changes to take effect.
  - On Windows 95 or Windows 98, reboot your PC to allow any environment changes to take effect.



---

## Installing Software on UNIX Servers

On UNIX, you can install server software from the CD-ROM in the following ways:

- From the top directory of the CD-ROM
- From an individual product directory of the CD-ROM

To install from the top directory of the CD-ROM, you run `setup . sh` (or `SETUP . SH`). It lets you choose which product you want to install. You can install only one product at a time. `setup . sh` (or `SETUP . SH`) then runs `essinst` (or `ESSINST`) for that product.

Alternatively, you can install from an individual product directory by running `essinst` (or `ESSINST`) in each product directory yourself.

---

### ***Before You Install on UNIX***

Before you install server products on any UNIX platform, do the following:

- Create an account called `arbor` which has Read/Write/Execute access to the target directory for the Essbase installation. Give this account the same default directory you are using for Essbase (for example, `/home/essbase`). Ideally, the `arbor` account will own this target directory.

**Note:** The installation program requires you to be logged on as `arbor`.

- Create a target directory for the Essbase files. For example,  
`/home/essbase`

If you do not create a target directory, the installation program prompts you for permission to create it. If you want to use, or fall back to, a previous version of Essbase, install Essbase Version 5.0.x to a different directory than the previous version. Do not create subdirectories under `/essbase`. The installation program creates the appropriate subdirectories.

- Apply the latest patches for your operating system in areas that might affect Essbase.

**Warning:** Some operating system vendors issue patches frequently.

---

### ***Installing from the Top Directory, or a Product Directory, of the CD-ROM***

To install UNIX products from either the top directory, or a product directory, of the CD-ROM, do the following:

1. Log in to the server as `arbor`.
2. Insert the CD-ROM into your CD-ROM drive.
3. Depending on where you want to install from, do one of the following:

If you want to install from the **top directory**, do the following:

- a. Change to the top directory of the CD-ROM (for example, `cd /cdrom`).
- b. Use the `ls` command to find `setup.sh` (or `SETUP.SH`).

Some UNIX CD-ROM drivers list file names in uppercase. Others list them in lowercase. See whether `setup.sh` is in uppercase or lowercase.

- c. Enter `./setup.sh` or `./SETUP.SH`, depending on what you learned in step b. `setup.sh` (or `SETUP.SH`) does the following:
  - Asks you which product to install—API, Server, or SQL Interface
  - Runs the executable `essinst` (or `ESSINST`) to install that product

**Note:** You must run `setup.sh` (or `SETUP.SH`) separately for each Essbase product you want to install.

If you want to install from the **product directory**, do the following:

- a. Change to the directory of the CD-ROM for the product you want to install (for example, `cd /cdrom/solaris/server`).
- b. Use the `ls` command to find `essinst` (or `ESSINST`).

Some UNIX CD-ROM drivers list file names in uppercase. Others list them in lowercase. See whether `essinst` is in uppercase or lowercase.

- c. Enter `./essinst` or `./ESSINST`, depending on what you learned in step b. `essinst` (or `ESSINST`) installs the product from the directory you are in.
4. Follow the prompts and provide the information requested.

**Note:** To cancel installation at any time, press `Ctrl-C`.

5. When prompted, enter your license number exactly as it appears on your registration card.

See Chapter 1, Product Components and Software Registration, for more information on software registration.

6. When prompted, type the directory where you want to install Essbase.

The installation program uses `/home/essbase` as the default directory. You can choose another directory, and if it does not exist, the installation program will create it for you.

The installation program decompresses the `server.tz` file(s), and copies files to the directory you choose (or default to), and to subdirectories it creates under that directory. Do not create these subdirectories yourself.

*Note:* Essbase on UNIX requires a multithreaded environment. If you are installing on AIX or HP-UX, and if the installation program does not detect the presence of the appropriate multithreaded environment, such as the DCE library, the installation stops, and an error message such as the following appears:

```
DCE Library is not installed. Installation aborted.
```

7. Update your environment before you use Essbase.

---

### ***After You Install on UNIX***

The installation program does not update the environment files `.cshrc` or `.profile`, depending on your shell. You must update the appropriate file manually.

Read `essbaseenv.doc`, created on installation, on setting your environment for the Essbase server. If you are installing on **Solaris**, also run `root.sh` from the `$ARBORPATH/bin` directory, where `$ARBORPATH` is the directory where you installed the Essbase server. The default installation directory is `/home/essbase`. See Chapter 5, UNIX Server Installation, for more information.

If you are installing SQL Interface on any UNIX platform, you must take additional steps to set your environment. See Chapter 12, SQL Interface Installation, for details.

After installation and updating the environment, log out and log in again to enable the new settings to take effect. Then begin to use Essbase.

---

## Directories Created on Installing Server Software

On installing server products (the Essbase server, sample applications, and SQL Interface), the installation program creates the following directories:

```
C:\ESSBASE
  APP
    DEMO
      BASIC
    SAMPEAST
      EAST
    SAMPLE
      BASIC
      INTERNTL
      XCHGRATE
    SAMPPART
      COMPANY
  BIN
  DOCS
    CLIENT
  ODBCDOCS
  LOCALE
```

Applications and related databases are in the APP directory. The program files for the server products are in the BIN directory.

The SQL Interface Guide is provided in the DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The .PDF file is named ESSQLINT.PDF. Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from [WWW.ADOBE.COM](http://WWW.ADOBE.COM). On the Essbase CD-ROM, the Acrobat Reader executable file is located in the ADOBE directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

Documentation for SQL Interface for Intel Windows NT, Solaris, and AIX is in the ODBCDOCS directory in .PDF format.

The same directory structure, except for ODBCDOCS, is created on DEC Alpha Windows NT.

**Note:** In some licensing instances, installation of the four sample applications may be restricted to the main application (Sample) and its three databases (Basic, Interntl, and Xchgrate). In this case, Demo, Sampeast, and Samppart are not available. Please refer to your license agreement for details.

The LOCALE directories contain the character-set files necessary for all the languages Essbase supports, including English.

## Installing Client Software from CD-ROM

When installing client software from CD-ROM on a Windows- or Windows NT-based PC, the installation program provides the following options:

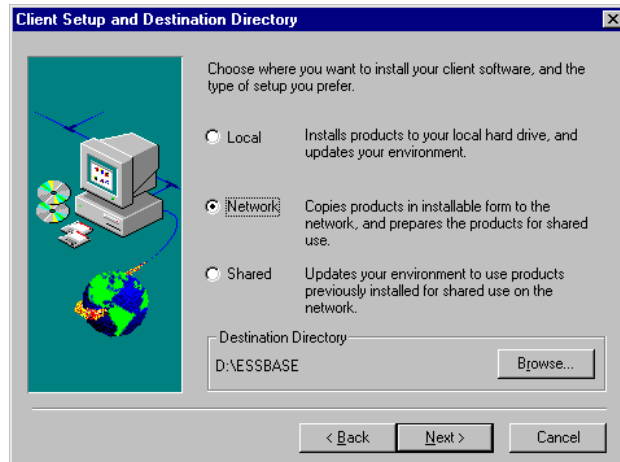


Figure 2-3, Three Client Installation Options

The first and third options, **Local** and **Shared**, give the client PC user the following ways to install client software:

- **Local** installs the client software on the client PC's hard drive, so the client PC user can run it locally. This also updates the client PC's operating environment to run the software locally, unless the client PC user chooses to manually update environment settings.
- **Shared** sets up the client PC's operating environment to run the client software previously installed on a network drive by the Essbase System Administrator. The **Shared** option installs only Windows or Windows NT system files on the client PC's hard drive.

The second option, **Network**, lets the Essbase System Administrator install client software to a network drive, so the client PC user can install it from there. This installs the following files on the network drive:

- An installation directory containing installation programs, so the client PC user can install the client software on the client PC's hard drive
- Program files so the client PC user can run the client software on the network drive

The Essbase installation program (SETUP . EXE), and Windows and Windows NT system files for setting up the client PC's operating environment, are also installed.

**Note:** Client PC users, do *not* select the **Shared** installation option in the **Client Setup and Destination Directory** dialog box, unless instructed by the Essbase System Administrator. Instead, see Chapter 6, Application Manager Installation, on installing from the network drive; Chapter 8, Spreadsheet Add-in for Excel Installation, on installing from the network drive; and Chapter 9, Spreadsheet Add-in for 1-2-3 Installation, on installing from the network drive.

---

## Installing the Application Manager, Spreadsheet Add-in, or Runtime Client to a Network Drive

If your client users are running Windows 95, Windows 98, or Windows NT, you can install the Application Manager, Spreadsheet Add-in, or Runtime Client from the CD-ROM to a network drive, so your client PC users can install it from there.

**Note:** The Runtime Client lets you install only the Essbase files which are required to run applications created using the Hyperion Essbase Application Programming Interface. To install the Application Manager, Spreadsheet Add-in, or Runtime Client from the CD-ROM to a network drive, do the following:

1. Insert the CD-ROM into your CD-ROM drive.
2. Run SETUP . EXE from the top directory of the CD-ROM.
3. Follow the prompts, and provide the information requested.

**Note:** To cancel installation at any time, click the **Cancel** and **Exit Setup** buttons.

4. When prompted, you can optionally enter your license number. See Chapter 1, Product Components and Software Registration, for more information on registration.
5. When the **Essbase Products** dialog box appears, click on **Client products**.

The individual client products appear in the list box on the right.

**Note:** The installation program displays the product choices for your license agreement and operating system.

6. Click to the *left* of **Client products** to select all the client products, or click to the *left* of just those client products you want to install.

A check mark appears next to each client product you select.

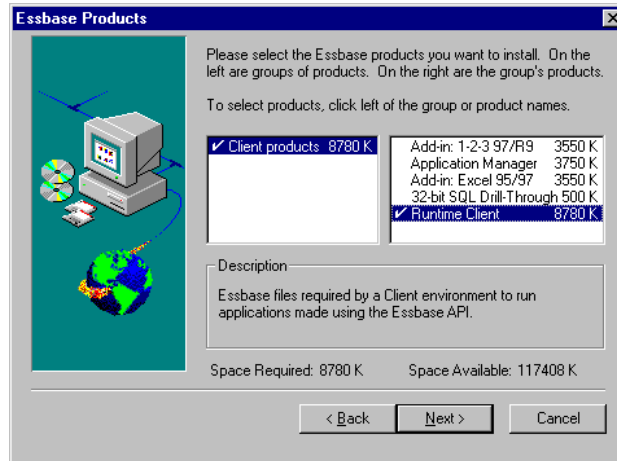


Figure 2-4, Selecting Client Products

7. When you finish selecting, click **Next**.
8. In the **Client Setup and Destination Directory** dialog box, select **Network**, specify the directory where you want to install the client products you have selected, and click **Next**.

**Note:** The default directory is `C:\ESSBASE`. Click **Browse** to select or type another directory. If you select or type a directory that does not exist, the installation program will create it for you.

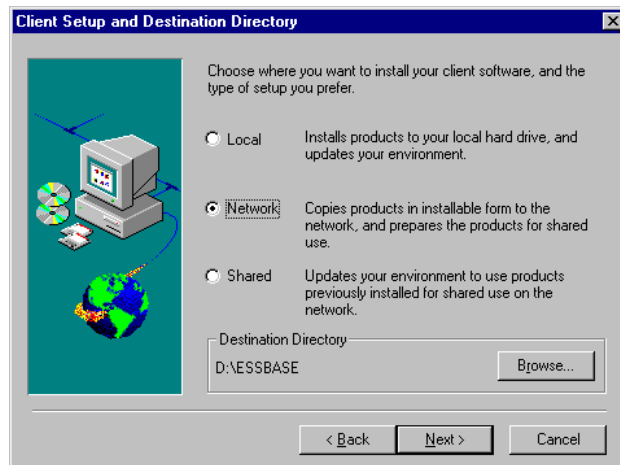


Figure 2-5, Choosing to Install Client Products to a Network Drive

9. In the **Network Protocol** dialog box, select your network protocol, and click **Next**.
10. If you install the Application Manager, an **Install Documentation?** dialog box appears. Click **Next** to install the online HTML documentation.

**Note:** It is recommended that you install the online HTML documentation to a network drive, so all client users can access it from there. The installation program creates the `\ESSBASE\DOCS` directory on the network drive. You can also make the HTML documentation available to client users by copying the `DOCS` directory from the root directory of the CD-ROM to a network drive. Or, you can access the HTML documentation in the `DOCS` directory of the CD-ROM itself. In all instances, to view the HTML documentation, open the `INDEX . HTM` file in the `DOCS` directory. To learn more about HTML documentation, see “Viewing Essbase HTML Documents” on page xviii in the Introduction.

11. In the **Update Environment?** dialog box, answer whether you want the installation program to update your environment, and click **Next**.

**Note:** If you don’t want the installation program to update your environment, then you must update it yourself. See Chapter 6, Application Manager Installation, “Manually Updating Your Environment Settings” on page 6-14, Chapter 8, Spreadsheet Add-in for Excel Installation, and Chapter 9, Spreadsheet Add-in for 1-2-3 Installation.



12. In the **Confirm Choices** dialog box, review your selections for installation. Click **Next** to accept the list, or **Back** to modify the list.
13. In the **README** dialog box, answer whether you want to see the Readme file.
14. When the message appears stating the installation was successful, do one of the following:
  - On Windows NT, log out and log in again, or reboot your PC, to allow any environment changes to take effect.
  - On Windows 95 or Windows 98, reboot your PC to let environment changes take effect.

---

### ***Directories Created on Installing Client Software to a Network Drive***

The **Network** installation option installs the following on the network drive:

- Program files for running the client software on the network drive
- The Essbase installation program (SETUP . EXE)
- Windows and Windows NT system files for setting up the client PC's operating environment

For example, if you install the Spreadsheet Add-in for Excel to the network drive N, and accept the default directory ESSBASE, the installation program creates the following directories for the installation folder for the Spreadsheet Add-in:

```
N:\ESSBASE
    ESSEXC32
```

The Spreadsheet Add-in installation program, SETUP . EXE, is in the ESSEXC32 directory.

The **Network** installation program creates the following additional directories on drive N for the program files for the Spreadsheet Add-in:

```
BIN
CLIENT
    SAMPLE
DOCS
    CLIENT
LOCALE
```

The Spreadsheet Add-in program files are in the BIN directory. The Add-in file for 32-bit Excel 95 or Excel 97 is ESSEXCLN.XLL.

When you install the Application Manager, the Spreadsheet Add-in for 1-2-3, or the Runtime Client, Essbase creates the same directories for their program files, unless these directories have already been created. The executable file for the Application Manager is ESSADMIN.EXE. These files are also in the BIN directory.

Essbase also creates one other directory when you install client software. If you install the Application Manager or a Spreadsheet Add-in, and if you then choose to also install the online HTML documentation, Essbase creates a DOCS directory. It contains numerous subdirectories, as well as the INDEX.HTM file which you open to view the HTML documentation.

Each *Spreadsheet Add-in User's Guide* is provided in the DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The .PDF files are named ESSEXCEL.PDF, and ESS123W.PDF (for Excel and Lotus 1-2-3, respectively). Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from WWW.ADOBE.COM. On the Essbase CD-ROM, the Acrobat Reader executable file is located in the ADOBE directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

The LOCALE directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Installing SQL Drill-Through to a Network Drive

You cannot install SQL Drill-Through to a network drive using the network installation feature of the CD-ROM installation program. If you select the **Network** option in the **Client Setup and Destination Directory** dialog box, SQL Drill-Through does not install correctly.

Instead, do the following to enable your client users to install SQL Drill-Through from the network drive to their client PC's hard drives:

- Use your operating system to copy the contents of the SQL Drill-Through product directory from the CD-ROM to a network drive. You can copy the contents to any network directory. If you have previously installed the Spreadsheet Add-in or the Application Manager to a network drive, you can copy the installation folder for SQL Drill-Through to an equivalent Essbase directory on the same network drive.

The installation program for SQL Drill-Through is in the following directory:  
WIN32\CLIENT\SQLDRILL.

To copy the SQLDRILL directory and its contents to a network drive using your operating system, do the following:

- a. Create a directory for SQL Drill-Through that is at the same level as the SQLDRILL installation folder directory created by the **Network** installation program for the Application Manager and Spreadsheet Add-in.

For example, if you install both the Application Manager and the Spreadsheet Add-in for Excel to the ESSBASE directory on the network drive N, the **Network** installation program creates the following directories:

```
N: \ESSBASE
    APPMAN
    BIN
    CLIENT
    DOCS
    ESSEXC32
```

The installation directory for the Application Manager is called APPMAN, and the installation directory for the Spreadsheet Add-in for Excel is called ESSEXC32.

Create an equivalent directory for the 32-bit SQL Drill-Through installation program, and call the directory ESSSQL32.

```
N: \ESSBASE
    APPMAN
    BIN
    CLIENT
    DOCS
    ESSEXC32
    ESSSQL32
```

- b. Using your operating system, copy the contents of the SQL Drill-Through product directory from the CD-ROM to this directory.

For example, using DOS, type the following command:

```
XCOPY D:\WIN32\CLIENT\SQLDRILL\*.* N:\ESSBASE\ESSSQL32\*.* /S
```

This copies the installation folder for SQL Drill-Through (a directory called SQLDRILL, and its contents) from the CD-ROM on drive D to the Essbase directory ESSSQL32 on drive N.

## Installing Client Software to Your Client PC's Hard Drive

If you are running Windows 95, Windows 98, or Windows NT, you can install client software on your client PC's hard drive from the CD-ROM. To install the Application Manager, Spreadsheet Add-in, Runtime Client, or SQL Drill-Through to your client PC's hard drive, do the following:

1. Insert the CD-ROM into your CD-ROM drive.
2. Run `SETUP . EXE` from the top directory of the CD-ROM.
3. Follow the prompts, and provide the information requested.

To cancel installation at any time, click the **Cancel** and **Exit Setup** buttons.

4. When prompted, you can optionally enter your license number. See Chapter 1, Product Components and Software Registration, for more information on registration.
5. When the **Essbase Products** dialog box appears, click on **Client products** in the list box on the left.

The individual client products appear in the list box on the right.

**Note:** The installation program displays the product choices for your license agreement and operating system.

6. Click to the *left* of **Client products** to select all the client products, or click to the *left* of just those client products you want to install.

A check mark appears next to each client product you select.

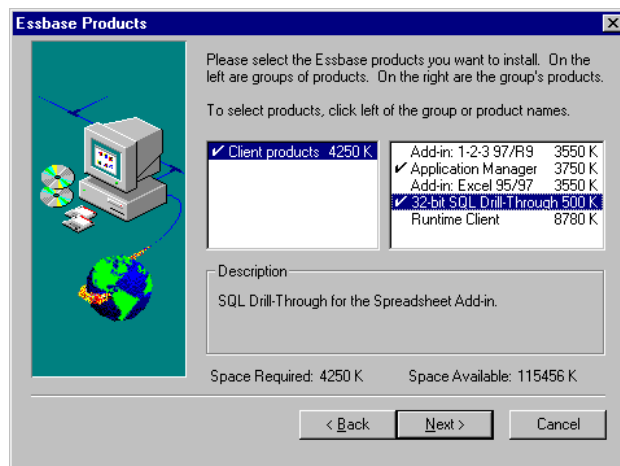


Figure 2-6, Selecting Client Products

7. When you finish selecting, click **Next**.
8. In the **Client Setup and Destination Directory** dialog box, select **Local**, specify the directory where you want to install the client products you selected, then click **Next**.

**Note:**

The default directory is C:\ESSBASE. Click **Browse** to select or type another directory. If you select or type a directory that does not exist, the installation program will create it for you.

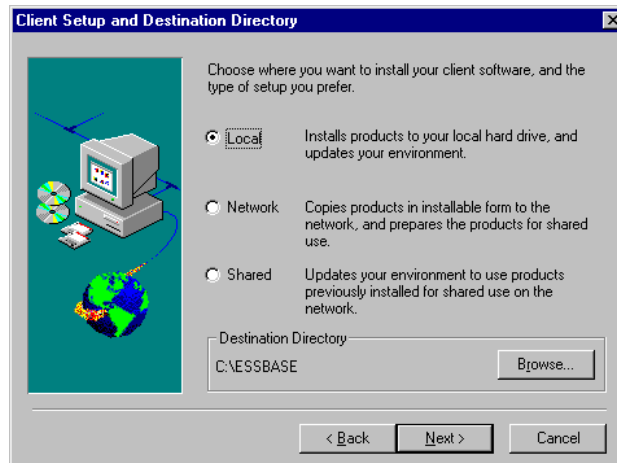


Figure 2-7, Choosing to Install Client Products on Your Client PC's Hard Drive

9. In the **Network Protocol** dialog box, select your network protocol, and click **Next**.
10. If you install the Application Manager, an **Install Documentation?** dialog box appears. Choose to not install the online HTML documentation, and click **Next**.

**Note:**

It is recommended that your Essbase System Administrator install or copy the online HTML documentation to a network drive, so that all client users can access it from there. The installation program creates an \ESSBASE\DOCS directory with numerous subdirectories. To view the documentation, open the INDEX.HTM file in the DOCS directory. You can also access the HTML documentation in the DOCS directory of the CD-ROM itself. To learn more about HTML documentation, see "Viewing Essbase HTML Documents" on page xviii in the Introduction.

11. In the **Update Environment?** dialog box, answer whether you want the installation program to update your environment, and click Next.

**Note:**

If you don't want the installation program to update your environment, then you must update it yourself. See Chapter 6, Application Manager Installation, "Manually Updating Your Environment Settings" on page 6-14, Chapter 8, Spreadsheet Add-in for Excel Installation, or Chapter 9, Spreadsheet Add-in for 1-2-3 Installation.

12. In the **Confirm Choices** dialog box, review your selections for installation. Click **Next** to accept the list, or **Back** to modify the list.
13. In the **README** dialog box, answer whether you want to see the Readme file.
14. When the message appears stating the installation was successful, do one of the following:
  - On Windows NT, log out and log in again, or reboot your PC, to allow any environment changes to take effect.
  - On Windows 95 or Windows 98, reboot your PC to let environment changes take effect.

**Notes:**

- For more information on installing client products from the network drive, including platform requirements and environment settings, see Chapter 6, Application Manager Installation, Chapter 8, Spreadsheet Add-in for Excel Installation, and Chapter 9, Spreadsheet Add-in for 1-2-3 Installation.

### ***Directories Created on Installing Client Software to a Client PC's Hard Drive***

On installing client products (the Application Manager, Spreadsheet Add-in, SQL Drill-Through, and Runtime Client), the **Local** installation option creates the following directories on your client PC's hard drive:

```

ESSBASE
    BIN
    CLIENT
        SAMPLE
    DOCS
        CLIENT
    LOCALE
  
```

The program files for the client products are in the BIN directory. This includes the Spreadsheet Add-in file (ESSEXCLN.XLL for 32-bit Excel 95 and Excel 97, and ESS123.12A for 32-bit Lotus 1-2-3 97 and Lotus 1-2-3 Release 9), the executable file for the Application Manager (ESSADMIN.EXE), and the SQL Drill-Through extension file (32-bit SQLDRILN.DLL).

The Essbase sample spreadsheets reside in the CLIENT\SAMPLE directory. If you create applications and databases, and store them on your client PC's hard drive, they reside in the CLIENT directory as follows:

```
CLIENT
      APPNAME
      DBNAME
```

where APPNAME is the name of your application and DBNAME is the name of your database.

Each *Spreadsheet Add-in User's Guide* and the *SQL Drill-Through Guide* are provided in the DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The .PDF files are named ESSEXCEL.PDF and ESS123W.PDF for Excel and Lotus 1-2-3, respectively, and ESSQLDRL.PDF for SQL Drill-Through. Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from [www.adobe.com](http://www.adobe.com). On the Essbase CD-ROM, the Acrobat Reader executable file is located in the ADOBE directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

The LOCALE directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Chapter 3

# Windows NT Server Installation

The Hyperion Essbase OLAP Server is available for Windows NT-based 486, Pentium and DEC Alpha machines. (Personal Essbase for Windows NT is available only for Intel machines.)

You install the server software from the Hyperion Essbase CD-ROM. See Chapter 2, CD-ROM Installation.

Read this chapter for information on system requirements, directories, setting your environment, and starting the Essbase server on Windows NT.

See Chapter 13, *Using and Configuring Personal Essbase*, on how to configure your system, using Microsoft Loopback, to bypass the network and run Personal Essbase on Windows NT.

This chapter contains the following sections:

- “Windows NT Server Requirements” on page 3-2
- “Installing the Server Software” on page 3-3
- “Optimizing Network Throughput on Windows NT” on page 3-5
- “Manually Updating Environment Settings” on page 3-6
- “Starting the Essbase Server” on page 3-8
- “Running the Essbase Agent as a Windows NT Service” on page 3-11



---

## Windows NT Server Requirements

The Essbase server for Windows NT requires a system with at least the following:

**Table 3-1, Essbase Server Windows NT System Requirements**

Component	Requirements
Microprocessor	486 or higher, DEC Alpha <sup>1</sup>
RAM	32 MB <sup>2</sup>
Windows NT Version	3.51 or 4.0 on x86, 4.0 on DEC Alpha
Disk Space	Approximately 24 MB Server software uses 5 MB (6 MB on DEC Alpha). Sample applications use 8 MB as shipped and use 19 MB after fully loaded with default settings. See Chapter 8, Sample Applications.
Network Protocol	Named Pipes or TCP/IP (with MS Loopback for Personal Essbase only)

<sup>1</sup> Personal Essbase for Windows NT is not available for DEC Alpha machines.

<sup>2</sup> The base recommendation for running Essbase and its sample applications is 32 MB. Start with this amount, then allocate additional memory per the following table to accommodate your Essbase application.

**Table 3-2, Allocating Additional Memory for Essbase Server Windows NT**

Essbase Components	Approximate Amount of Memory Requirements
Code and static data	3–4 MB
Database outline	200 bytes per member
Index, data, and calculator caches	Per your settings. See the <i>Database Administrator's Guide</i> .

---

## Installing the Server Software

Typically, you install the server software from the Hyperion Essbase CD-ROM. The steps to install the Essbase server are covered in Chapter 2, CD-ROM Installation.

The Essbase server installation program, `SETUP . EXE`, does the following:

- Copies Essbase files to the `\ESSBASE\BIN` directory (or another directory that you specify) on your hard disk.
- Copies Essbase sample application files to the `\ESSBASE\APP` directory (or another directory that you specify) on your hard disk.
- Installs support for supported network protocols.
- Creates new directories, if this is a new installation.
- Updates existing directories, if you have a previous version of Essbase installed.
- Updates, if you choose, the Windows NT Registry and removes outdated settings.

---

## Installing Personal Essbase

For Personal Essbase, you must install both the Essbase server *and* the client components in the same root Essbase directory. By default, this directory is `C:\ESSBASE`.

If you have previously installed Essbase client software, or an Essbase server, on your machine, and it was *not* for Personal Essbase, you must reinstall both the server and the client software when you install Personal Essbase.

When installing on a Personal Essbase machine (either Windows NT, Windows 95, or Windows 98), you must install new versions of both the 5.0.2 client and 5.0.2 server. A 5.0 client/5.0.x server configuration is not recommended.

---

## Directories Created

The installation program creates the following directory structure:

```
ESSBASE
  APP
  BIN
  LOCALE
```

The BIN directory contains the Essbase server software.

The APP directory stores Essbase application files as they are created. Each application is stored in a subdirectory under the APP directory. Each database in an application is stored in a subdirectory under the application directory.

For example, suppose you create two applications on the server: Finance and Marketng. Then you add two databases to the Finance application: Currency and Main, and two databases to the Marketng application: Product and Sales. The server directory structure appears as follows:

```
C:\ESSBASE
  APP
    FINANCE
      CURRENCY
      MAIN
    MARKETNG
      PRODUCT
      SALES
  BIN
  LOCALE
```

**Note:** Essbase stores an activity log file for each application in each application's directory. (In the example, there are log files in the FINANCE and MARKETNG directories.) Log files track all user requests made to the application or to databases within the application.

The LOCALE directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Optimizing Network Throughput on Windows NT

On Windows NT servers, you can change your network settings to optimize the performance of networked applications. Essbase performance improves with this setting.

1. Exit Essbase.
2. Start the Control Panel.
3. Double-click the **Network** icon.
4. Do one of the following:

If you have Windows NT Version 4.0, the **Network** dialog box appears.

- a. Click the **Services** tab.
- b. In the **Network Services** list box, double-click **Server**.

If you have Windows NT Version 3.51, the **Network Settings** dialog box appears. In the **Installed Network Software** list box, double-click **Server**.

The **Server** dialog box appears.

**Note:**

If you see a message that you **Cannot configure the software component**, then your Windows NT machine is likely a Windows NT Workstation configuration, not a Windows NT server configuration, and you cannot change your network settings.

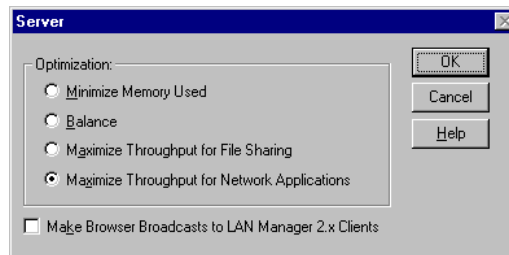


Figure 3-1, Choosing Maximize Throughput for Network Applications

5. Choose **Maximize Throughput for Network Applications**.
6. Click **OK**.

7. Do one of the following:
  - If you have Windows NT Version 4.0, the **Services** tab of the **Network** dialog box appears. Click **Close**.
  - If you have Windows NT Version 3.51, the **Network Settings** dialog box appears. Click **OK**.
8. Restart Windows NT.

---

## Manually Updating Environment Settings

The installation program gives you the option to automatically update your environment. To update the environment, the installation program changes several items in the Windows NT Registry and removes outdated settings.

If you don't want the installation program to update the Windows NT Registry, you can update it manually using the following steps. These steps assume that Essbase is installed in the C:\ESSBASE directory.

1. Start Windows NT.
2. Do one of the following:

**If you have Windows NT Version 3.51:**

- a. From Program Manager, choose File | Run.
- b. Specify the following program:

`\WINNT35\SYSTEM32\REGEDT32.EXE`

*Note:* Your directory name might be different depending on how you installed Windows NT.

**If you have Windows NT Version 4.0:**

- a. Click the Start button.
- b. In the Windows NT Server dialog box, click Run.
- c. In the **Run** dialog box, specify the following program:

`\WINNT40\SYSTEM32\REGEDT32.EXE`

*Note:* Your directory name might be different depending on how you installed Windows NT.

3. Open the HKEY\_LOCAL\_MACHINE window.
  4. In the HKEY\_LOCAL\_MACHINE window, double-click the following folders in succession:
    - a. System
    - b. CurrentControlSet
    - c. Control
    - d. Session Manager
    - e. Environment
  5. When the list under Environment appears, double-click ARBORPATH. The **String Editor** dialog box appears.
  6. In the **String** text box, type the following:  
C:\ESSBASE
  7. Click **OK**.
  8. In the Environment list, double-click PATH. The **String Editor** dialog box appears.
  9. In the **String** text box, change the path string to include C:\ESSBASE\BIN.
- Note:* For Personal Essbase, because Essbase uses the \$ARBORPATH and PATH environment variables to find the Essbase directory, the Essbase directory must contain both the server and the client components.
10. Click **OK**.
  11. Choose Registry | Exit to exit the RegEdit32 program.
  12. Log out and log in again, or reboot your PC.

---

## Starting the Essbase Server

Before you can access the Essbase server, the proper network protocol must be installed and running on your Windows NT machine.

See Chapter 14, *Network Configuration Notes*, for information on network protocols.

To start Essbase:

1. From a command prompt, type

```
ESSBASE . EXE
```

If you encounter any errors during startup:

- Check your path and environment settings.
  - Make sure the appropriate network protocol is installed and running on your Windows NT machine.
2. Do one of the following:

If this is a first-time installation, enter the following items:

- Company name. The name you enter is embedded in your server license registration.
- Your name. The name you enter is designated as the Essbase System Supervisor. Use this name for your initial login from the Application Manager.
- System password. This password is required when you start the Essbase server. It is also required to gain access to the server from the Application Manager using the Supervisor account.

You are asked to confirm your choices. Type **Y** to verify your entries, or **N** to retype them.

See Chapter 6, *Application Manager Installation*, for information on the Application Manager.

If this is not a first-time installation, enter the system password that you specified when you first ran Essbase.

The Essbase window then displays the following message:

```
Waiting for Client Requests...
```

You can now use the Essbase window to perform high-level supervisor operations. See “Console Operations” on page 3-10 for a list of available commands. For more information on starting and stopping the server, see Chapter 44 of the *Database Administrator’s Guide*.

---

## Automating the Server Startup

On Windows NT Version 4.0, you can place the Essbase server program in a startup folder so it will start automatically when Windows NT boots. You can also specify the server password, so you don't have to enter it each time the Essbase server starts.

To automate the server startup, do the following:

1. Follow the Windows NT online Help set forth in the following figure.

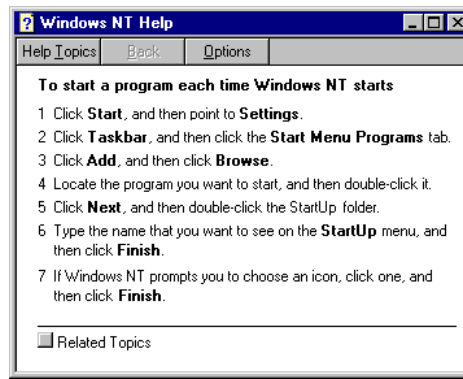


Figure 3-2, Windows NT Help

**Note:** If you installed Essbase to `C:\ESSBASE`, the program you will double-click in step 4 is the following:

```
C:\ESSBASE\BIN\ESSBASE.EXE
```

2. If you want the Essbase server password to be automatically entered each time the Essbase server starts, type your server password after `ESSBASE.EXE` on the command line before you proceed to step 5. For example, type

```
C:\ESSBASE\BIN\ESSBASE.EXE password
```

where *password* is your Essbase system password.

---

## Automating an Application or Database Startup

You can also automatically start up an application or database. When the Essbase server is started, Essbase starts any application or database that is defined with an automatic startup setting. You define startup settings in the Application Manager using the **Application Settings** dialog box and the **Database Settings** dialog box.

**Note:** See the Application Manager online Help for more information.



---

## Console Operations

Essbase has a server console called the *Agent*. When you start the main Essbase program (`ESSBASE . EXE`), the Agent window appears. This window acts as a console for high-level server operations. Pressing the `Enter` key in the Agent window provides a list of all available commands.

You can use the following commands in the Agent window:

**Table 3-3, Windows NT Agent Window Commands**

Commands	Description
<code>START APPNAME</code>	Starts the specified application.
<code>STOP APPNAME</code>	Stops the specified application.
<code>USERS</code>	Displays a list of all users that are connected to the server. The total number of connections is displayed, as well as the number of ports available.
<code>LOGOUTUSER USER</code>	Disconnects a user from the server and frees a port. This command requires the Essbase system password.
<code>PASSWORD</code>	Changes the system password that is required to start the Essbase server. Changing this password doesn't change the Essbase System Supervisor's password. This command requires the Essbase system password.
<code>VERSION</code>	Displays the server software version number.
<code>HELP</code>	Lists all valid Agent commands and their respective functions.
<code>PORTS</code>	Displays the number of ports that are installed on the server and how many are in use.
<code>DUMP FILENAME</code>	Dumps information from the Essbase security system to a specified file in ASCII format. If you don't supply a path with the file name, the file is saved to the <code>\ESSBASE\BIN</code> directory ( <code>/essbase/bin</code> on UNIX systems). This command requires the Essbase system password.
<code>QUIT/EXIT</code>	Shuts down all open applications and quits Essbase.

To learn about the Agent, see Chapter 44 of the *Database Administrator's Guide*.

---

## Running the Essbase Agent as a Windows NT Service

The Essbase Agent (`ESSBASE.EXE`) can now run as a Windows NT service. Running the Agent as a service lets you start and stop the Agent from the Windows NT Control Panel. Running the Agent as an automatic service starts the Agent as a service when you start Windows NT.

The section contains the following subsections:

- “Installing the Essbase Agent as an Automatic Service” on page 3-11
- “Setting the System Environment to Run the Essbase Agent as a Service” on page 3-12
- “Verifying that the Essbase Agent Is Running as an Automatic Service” on page 3-12
- “Stopping the `ESSBASE SERVICE`” on page 3-13
- “Starting the `ESSBASE SERVICE`” on page 3-13
- “Resetting the Essbase Agent as an Automatic Service” on page 3-14
- “Removing the Essbase Agent as a Service” on page 3-14

*Note:* The Windows NT Task Manager does not let you kill any process started as a Windows NT service. If the Essbase Agent is started as a service, and if it or the server hangs, you must shut down the server machine to stop the `ESSBASE SERVICE`.

---

## Installing the Essbase Agent as an Automatic Service

To install the Essbase Agent as a Windows NT service that starts automatically when you start Windows NT, type the following from the command line:

```
ESSBASE.EXE -SERVICE INSTALL
```

You should get a message that Essbase has been installed as a service. The Essbase Agent is now listed as `ESSBASE SERVICE` in the **Services** dialog box of the Control Panel. The Essbase Agent is also set to start automatically when you start Windows NT.

---

## Setting the System Environment to Run the Essbase Agent as a Service

To run the Essbase Agent as a Windows NT service, Windows NT needs to know where Essbase is located, and needs to add the `ARBORPATH\BIN` directory to the system-wide `PATH` variable. On Windows NT 3.51 or 4.0, do the following:

1. Open the Windows NT Control Panel.
2. Double-click **System**.  
The **System** dialog box appears.
3. On Windows NT 4.0, choose the **Environment** tab. On Windows NT 3.51, go to step 4.
4. In the **System Environment Variables** list box (Windows NT 3.51), or in the **System Variables** list box (Windows NT 4.0), set the following variables:
  - `ARBORPATH=C:\ESSBASE`, or wherever Essbase is installed.
  - Add `%ARBORPATH%\BIN` to the **Path** variable.

*Note:* The above changes should be made under **System Variables**, not **User Variables**. System variables are defined across the system for all users. User variables are defined only for specific users.

5. Reboot your machine to allow these changes to take effect.

The Essbase Agent now runs as a Windows NT service. It also starts automatically when you start Windows NT.

---

## Verifying that the Essbase Agent Is Running as an Automatic Service

To verify that the Essbase Agent is running as an automatic Windows NT service, after you reboot do the following:

1. Open the Windows NT Control Panel.
2. Double-click **Services**.

The **Services** dialog box appears. You should see the Essbase Agent listed as `ESSBASE SERVICE` in the list of services. The **Startup** field for `ESSBASE SERVICE` should say `AUTOMATIC`, and the **Status** field should say `STARTED`.

*Note:* If the **Startup** field is blank, or if it says `DISABLED` or `MANUAL`, see “Resetting the Essbase Agent as an Automatic Service” on page 3-14.

---

## Stopping the ESSBASE SERVICE

To stop the Essbase Agent from the Control Panel, do the following:

1. Open the Windows NT Control Panel.
2. Double-click **Services**.

The **Services** dialog box appears. You should see ESSBASE SERVICE in the list of services.

3. Highlight, but do not double-click, ESSBASE SERVICE.
4. Click **Stop** to stop the service.

The **Service Control** message box appears. After a delay, it disappears, and the **Status** field for ESSBASE SERVICE changes to STOPPED.

*Note:*

Stopping the ESSBASE SERVICE can take some time, depending on how many application servers are running. The time it takes is the same amount it would take to stop ESSBASE . EXE if it were running from the command line or as a background process.

---

## Starting the ESSBASE SERVICE

If you have stopped the ESSBASE SERVICE, you can start it again from the **Services** dialog box of the Control Panel. Do the following:

1. Open the Windows NT Control Panel.
2. Double-click **Services**.

The **Services** dialog box appears. You should see Essbase listed as ESSBASE SERVICE in the list of services.

3. Highlight, but do not double-click, ESSBASE SERVICE.
4. Click the **Start** button to start the ESSBASE SERVICE.

The **Service Control** message box appears. After a delay, it disappears, and the **Status** field entry for ESSBASE SERVICE changes to STARTED.

---

## Resetting the Essbase Agent as an Automatic Service

When you install the Essbase Agent as a Windows NT service, it is listed as `ESSBASE SERVICE` in the list of services. However, someone might disable it or set it to manual startup. If that occurs, you can reset the `ESSBASE SERVICE` to start automatically. Do the following:

1. Open the Windows NT Control Panel.
2. Double-click **Services**.

The **Services** dialog box appears. You should see Essbase listed as `ESSBASE SERVICE` in the list of services.

3. Double-click `ESSBASE SERVICE`.

The **Service** dialog box appears.

4. Click the **Automatic** option.
5. Under the **Log On As** section, choose **System Account**.

This sets the `ESSBASE SERVICE` for automatic startup, and uses the system account.

---

## Removing the Essbase Agent as a Service

To remove the Essbase Agent as a Windows NT service, type the following from the command line:

```
ESSBASE.EXE -SERVICE REMOVE
```

You should get a message that Essbase has been removed as a service.

Removing the `ESSBASE SERVICE` removes it from the list of Windows NT registered services. It does not un-install Essbase. You can still start the Essbase server. See "Starting the `ESSBASE SERVICE`" on page 3-13.

---

## What's Next?

After you have successfully started the Essbase server, install the Application Manager, and verify that you can connect to the server from the Application Manager.

To run Personal Essbase, which runs the Essbase server and the client software on the same machine, you may need to configure your system to bypass the network. See Chapter 13, *Using and Configuring Personal Essbase*, on how to do this. See Chapter 6, *Application Manager Installation*, for information on the Application Manager.

If you installed the sample applications, you need to load data into them. The sample applications are provided as examples of basic Essbase databases. The *Spreadsheet Add-in User's Guide* uses the Sample Basic database in a step-by-step tutorial on the spreadsheet features.

See Chapter 7, *Sample Applications*, for information on loading data into the sample applications and preparing them for use.

---

## Chapter 4

# Personal Essbase Installation

Personal Essbase is available for a Windows 95 or Windows 98-based Pentium PC.

You install Personal Essbase from the Hyperion Essbase CD-ROM. For detailed information about installing from the CD-ROM, see Chapter 2, CD-ROM Installation.

Read this chapter for information on system requirements, directories, setting your environment, and starting the Personal Essbase server on Windows 95 or Windows 98.

See Chapter 13, *Using and Configuring Personal Essbase*, to learn how to configure your system, using Microsoft Loopback, to bypass the network and run the Personal Essbase server and clients on the same machine.

*Note:* Personal Essbase is also available for Windows NT on 486 or higher machines, but not on DEC Alpha. For more information, see Chapter 3, *Windows NT Server Installation*.

When installing on a Personal Essbase machine (either Windows NT, Windows 95, or Windows 98), you must install new versions of both the 5.0.2 client and 5.0.2 server. A 5.0 or 5.0.1 client/5.0.2 server configuration is not recommended.

This chapter contains the following sections:

- “Windows Server Requirements” on page 4-2
- “Installing Personal Essbase” on page 4-3
- “Manually Updating Environment Settings” on page 4-5
- “Starting the Essbase Server” on page 4-6

---

## Windows Server Requirements

Personal Essbase for Windows 95 and Windows 98 requires a system with at least the following:

**Table 4-1, Essbase Server Windows 95 and Windows 98 System Requirements**

Component	Requirement
Microprocessor	486 or higher
RAM	32 MB <sup>1</sup>
Disk Space	Approximately 24 MB Server software uses 5 MB. Sample applications use 8 MB as shipped and use 19 MB after fully loaded with default settings. See Chapter 7, Sample Applications.
Network Protocol	TCP/IP with Dial-up MS Loopback

<sup>1</sup> The base recommendation for running Essbase and its sample applications is 32 MB for Windows 95/98 servers. Start with this amount, then allocate additional memory per the following table to accommodate your Essbase application.

**Table 4-2, Allocating Additional Memory for Windows 95 and Windows 98**

Essbase Component	Approximate Amount of Memory Required
Code and static data	3–4 MB
Database outline	200 bytes per member
Index, data, and calculator caches	Per your settings. See the <i>Database Administrator's Guide</i> .



---

## Installing Personal Essbase

Typically, you install the server software from the Hyperion Essbase CD-ROM. The steps to install the Essbase server are covered in Chapter 2, CD-ROM Installation.

The Essbase server installation program, `SETUP . EXE`, does the following:

- Copies Essbase files to the `\ESSBASE\BIN` directory (or another directory that you specify) on your hard disk.
- Copies Essbase sample application files to the `\ESSBASE\APP` directory (or another directory that you specify) on your hard disk.
- Installs support for supported network protocols.
- Creates new directories, if this is a new installation.
- Updates existing directories, if you have a previous version of Essbase installed.
- Updates, if you choose, the Windows 95 or Windows 98 environment settings.

---

## Before You Install Personal Essbase

For Personal Essbase, you must install both the Essbase server *and* the client components in the same root Essbase directory. By default, this directory is `C:\ESSBASE`.

If you have previously installed Essbase client software on your machine, and if it was *not* for Personal Essbase, you must reinstall both the server and the client software when you install Personal Essbase.

---

## Directories Created

The installation program creates the following directory structure:

```
ESSBASE
  APP
  BIN
  LOCALE
```

The BIN directory contains the Essbase server software.

The APP directory stores Essbase application files as they are created. Each application is stored in a directory under the APP directory. Each database in an application is stored in a directory under the application directory.

For example, suppose you create two applications on the server: Finance and Marketng. Then you add two databases to the Finance application: Currency and Main, and two databases to the Marketng application: Product and Sales. The server directory structure appears as follows:

```
C:\ESSBASE
  APP
    FINANCE
      CURRENCY
      MAIN
    MARKETNG
      PRODUCT
      SALES
  BIN
  LOCALE
```

**Note:** Essbase stores an activity log file for each application in each application's directory. (In the example, there are log files in the FINANCE and MARKETNG directories.) Log files track all user requests made to the application or to databases within the application.

The LOCALE directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Manually Updating Environment Settings

The installation program gives you the option to automatically update your environment.

If you don't want the installation program to automatically update your environment settings, you can update them manually using the following steps. These steps assume that Essbase is installed in the `C:\ESSBASE` directory.

Complete these steps:

1. Add the following environment variable to your `AUTOEXEC.BAT` file:

```
ARBORPATH=C:\ESSBASE
```

Do not put a space before or after the equal sign (=) in the `ARBORPATH` environment setting.

2. Add `C:\ESSBASE\BIN` to your `PATH` statement.

**Note:**

Because Essbase uses the `$ARBORPATH` and `PATH` environment variables to find the Essbase directory, the Essbase directory must contain both the server and the client components.

3. Remove references (from previous installations) to Essbase in other directories.

You can type `SET` from a DOS command prompt to view your current environment settings.

4. Shut down and restart Windows.

---

## Starting the Essbase Server

Before you can access the Essbase server, the proper network protocol must be installed and running on your Windows 95 or Windows 98 machine. See Chapter 14, *Network Configuration Notes*, for information on network protocols.

To start Essbase:

1. From a command prompt, type

```
ESSBASE . EXE
```

If you encounter any errors during startup:

- Check your path and environment settings.
  - Make sure the appropriate network protocol is installed and running on your Windows 95 or Windows 98 machine.
2. Do one of the following:

If this is a first-time installation, enter the following items:

- Company name. The name you enter is embedded in your server license registration.
- Your name. The name you enter is designated as the Essbase System Supervisor. Use this name for your initial login from the Application Manager.
- System password. This password is required when you start the Essbase server. It is also required to gain access to the server from the Application Manager using the Supervisor account.

You are asked to confirm your choices. Type **Y** to verify your entries, or **N** to retype them.

See Chapter 6, *Application Manager Installation*, for information on the Application Manager.

If this is not a first-time installation, enter the system password that you specified when you first ran Essbase.

The Essbase window then displays the following message:

```
Waiting for Client Requests...
```

You can now use the Essbase window to perform high-level supervisor operations. See “Console Operations” on page 4-8 for a list of available commands. For more information on starting and stopping the server, see Chapter 44 of the *Database Administrator’s Guide*.

---

## Automating the Server Startup

If you place Essbase in a startup folder, the Essbase server starts automatically when Windows 95 or Windows 98 boots. You can also specify the system password, so you don't have to enter it each time the Essbase server starts.

To automate the server startup, do the following:

1. Choose Settings | Taskbar from the Start menu.
2. Click the Start Menu Programs tab.
3. Click the **Add** button, and define the **Command Line** option as the following:

```
C:\ESSBASE\BIN\ESSBASE.EXE
```

This command line assumes that you installed Essbase to C:\ESSBASE.

4. If you want the Essbase server password to be automatically entered each time the Personal Essbase server starts, specify the password after ESSBASE.EXE on the command line. For example, type the following:

```
C:\ESSBASE\BIN\ESSBASE.EXE password
```

where *password* is your Essbase server password.

5. Click **Next**, and double-click the **StartUp** folder.
6. Click **Next**, and specify a name for the program. For example, type the following:  

```
Essbase 5.0.2
```
7. Click **Finish** in the **Select a Title for the Program** dialog box.
8. Click **OK** in the **Taskbar Properties** dialog box.

---

### ***Automating an Application or Database Startup on Windows 95 or Windows 98***

You can also automatically start up an application or database. When the Essbase server is started, any application or database that is defined with an automatic startup setting will be started. You define startup settings in the Application Manager using the **Application Settings** dialog box and the **Database Settings** dialog box.

**Note:** See the Application Manager online help for more information.

---

## Console Operations

Essbase has a server console called the *Agent*. When you start the main Essbase program (`ESSBASE.EXE`), the Agent window appears. This window acts as a console for high-level server operations. Pressing the `Enter` key in the Agent window provides a list of all available commands.

You can use the following commands in the Agent window:

**Table 4-3, Agent Window Commands on Windows 95 or Windows 98**

Commands	Description
<code>START APPNAME</code>	Starts the specified application.
<code>STOP APPNAME</code>	Stops the specified application.
<code>USERS</code>	Displays a list of all users that are connected to the server. The total number of connections is displayed, as well as the number of ports available.
<code>LOGOUTUSER USER</code>	Disconnects a user from the server and frees a port. This command requires the Essbase password.
<code>PASSWORD</code>	Changes the system password that is required to start the Essbase server. Changing this password doesn't change the Essbase System Supervisor's password. This command requires the Essbase system password.
<code>VERSION</code>	Displays the server software version number.
<code>HELP</code>	Lists all valid Agent commands and their respective functions.
<code>PORTS</code>	Displays the number of ports that are installed on the server and how many are in use.
<code>DUMP FILENAME</code>	Dumps information from the Essbase security system to a specified file in ASCII format. If you don't supply a path with the file name, the file is saved to the <code>\ESSBASE\BIN</code> directory. This command requires the Essbase system password.
<code>QUIT/EXIT</code>	Shuts down all open applications and quits Essbase.

To learn about the Agent, see Chapter 44 of the *Database Administrator's Guide*.

---

## What's Next?

After you have successfully started the Personal Essbase server, install the Application Manager, and verify that you can connect to the server from the Application Manager.

To run Personal Essbase, which runs the Essbase server and client software on the same machine, you may need to configure your system to bypass the network. See Chapter 13, *Using and Configuring Personal Essbase*, to learn how to do this. See Chapter 6, *Application Manager Installation*, for information on the Application Manager.

If you installed the sample applications, you need to load data into them. The sample applications are provided as examples of basic Essbase databases. The *Spreadsheet Add-in* uses the Sample Basic database in a step-by-step tutorial on the spreadsheet features.

See Chapter 7, *Sample Applications*, for information on loading data into the sample applications and preparing them for use.

---

## Chapter 5

# UNIX Server Installation

The Hyperion Essbase OLAP Server is available for the following UNIX platforms:

- AIX from IBM
- HP-UX from Hewlett Packard
- Solaris from Sun Microsystems

You install the server software from the Hyperion Essbase CD-ROM. For more details about installing from CD-ROM, see Chapter 2, CD-ROM Installation.

Read this chapter for information on system requirements, directories, setting your environment, and running the Essbase server on UNIX.

This chapter contains the following sections:

- “UNIX Server Requirements” on page 5-2
- “Multithreaded Environment” on page 5-5
- “Installing the Server Software” on page 5-5
- “Updating the Environment Settings (All UNIX Systems)” on page 5-8
- “Starting the Essbase Server” on page 5-11



---

## UNIX Server Requirements

The Essbase server for UNIX requires a system that meets minimal hardware and software requirements. See the following section that is appropriate for your UNIX platform.

---

## AIX Server Requirements

The Essbase server for AIX requires a system with at least the following:

*Table 5-1, Essbase Server AIX System Requirements*

Component	Requirement
Server Platform	PowerPC machines, including RS 6000
RAM	32 MB (64 or more MB recommended)
AIX Version	4.2 or 4.3
Disk Space	33 MB Server software uses 13 MB. Sample applications use 9 MB as shipped and use 20 MB after fully loaded with default settings. See Chapter 7, Sample Applications.
Network Protocol	TCP/IP
Library	Kernel-threads (with pthread API) for AIX

---

## HP-UX Server Requirements

The Essbase server for HP-UX requires a system with at least the following:

**Table 5-2, Essbase Server HP-UX System Requirements**

Component	Requirement
Server Platform	PA-RISC machines
RAM	32 MB (64 or more MB recommended)
HP-UX Version	10.20 or 11.0
Disk Space	31 MB Server software uses 11 MB. Sample applications use 9 MB as shipped and use 20 MB after fully loaded with default settings. See Chapter 7, Sample Applications.
Network Protocol	TCP/IP
Library	DCE required for multithreading: Distributed Computing Environment (DCE) thread library for HP-UX, Version 1.4 or later.

**Note:** Because Essbase is a floating-point intensive program, contact your hardware vendor for optimum configuration.

---

## Solaris Server Requirements

The Essbase server for Solaris requires a system with at least the following:

**Table 5-3, Essbase Server Solaris System Requirements**

Component	Requirement
Server Platform	Sun SPARC or ULTRASPARC machines
RAM	32 MB (64 or more MB recommended)
Solaris Version	2.5.1 or 2.6
Disk Space	32 MB Server software uses 12 MB. Sample applications use 9 MB as shipped and use 20 MB after fully loaded with default settings. See Chapter 7, Sample Applications.
Network Protocol	TCP/IP
Library	Solaris Threads

---

## X-Windows

If you have X Windows installed, Essbase does not use it.

When you run Essbase, the Essbase Agent window appears. When you start an Essbase application, it runs in the background. No window appears, but messages from the application appear in the Essbase Agent window and are entered in the *appname.LOG* file.

If you want to view these messages from a telnet session, use the **tail** command to redirect messages to another window at a set interval. We recommend using `tail -f logfile` to view logged messages as they are posted to the file. Press `Ctrl-C` to stop viewing the file.

**Note:** You can also run the Essbase Agent in the background. For more information, see the *Database Administrator's Guide*.

---

## Multithreaded Environment

Essbase uses a multithreaded architecture to ensure high performance in a client-server environment.

Essbase supports the following threads programs:

- On AIX, Kernel-threads with pthread API
- On HP-UX, the DCE thread library, Version 1.4 or later
- On Solaris, Solaris Threads

On AIX and Solaris, the threads software is incorporated in the operating system, and you do not need to purchase it separately. On HP-UX, you must use the DCE thread library. On all platforms, you must ensure that the correct threads software for your operating system is properly installed before using Essbase.

*Note:* The DCE thread library used by HP-UX is developed by the Open Software Foundation, and provides user-level threading.

---

## Symmetric Multiprocessing

Essbase supports SMP (symmetric multiprocessing). An SMP server is beneficial where more than one Essbase application is defined on a single server machine.

---

## Installing the Server Software

Typically, you install the server software from the Hyperion Essbase CD-ROM. The steps to install the Essbase server are covered in Chapter 2, CD-ROM Installation.

On Solaris, after you install the Essbase server, you must run the Bourne shell script `root.sh`. On all UNIX platforms, you must update your environment, and you may remove extraneous files. For information on these issues, and on directories created during installation, read the following sections that are appropriate for your UNIX platform.

---

## Shell Script (Solaris)

If you installed the Essbase server on a Solaris system, you must run a Bourne shell script, `root.sh`, from the root account after Essbase is installed. The script, located in `$ARBORPATH/bin`, performs post-installation tasks.

To run `root.sh`, log in as user `root`, and enter the following commands:

```
$ su -  
Password: (enter your password)  
# cd /home/essbase/bin  
# sh root.sh  
# exit
```

**Note:** After it sets sticky bits on binaries and shared libraries, `root.sh` asks you whether you have installed the Hyperion Essbase SQL Interface module. If you have not, the program ends and the task is complete. If you have installed Essbase SQL Interface, `root.sh` prompts you for the full path and file name of the `libodbc.so` shared library. Enter the full path, including the file name `libodbc.so` itself; for example, `/home/essbase/bin/libodbc.so`.

See Chapter 12, SQL Interface Installation, on installing SQL Interface.

---

## Directories Created (All UNIX Systems)

The installation program creates the following directory structure:

```
essbase  
  bin  
  app  
  locale
```

The `bin` directory contains the Essbase server software.

The `app` directory stores Essbase applications as they are created. Each application is stored in a directory under the `app` directory. Each database in an application is stored in a directory under the application directory.

For example, suppose you create two applications on the server: Finance and Marketng. Then you add two databases to the Finance application: Currency and Main, and two databases to the Marketng application: Product and Sales. The server directory structure appears as follows:

```

essbase
  app
    Finance
      Currency
      Main
    Marketng
      Product
      Sales
  bin
  locale

```

**Note:** Essbase stores an activity log file for each application in each application's directory. (In the example, there are log files in the `Finance` and `Marketng` directories.) Log files track all user requests made to the application or to databases within the application.

The server installation program installs the following SQL Interface files:

- The SQL Interface library file—`libesssql.a` on AIX, `libesssql.so` on Solaris, and `libesssql.sl` on HP-UX.
- A stub ODBC drivers file—`libesssql.arbor.a` on AIX, `libesssql.arbor.so` on Solaris, and `libesssql.arbor.sl` on HP-UX.

The SQL Interface library file symbolically links to the stub ODBC drivers file until SQL Interface is installed. It then symbolically links to the INTERSOLV ODBC drivers file—`libesssql.insolv.a` on AIX, `libesssql.insolv.so` on Solaris, and `libesssql.insolv.sl` on HP-UX. Chapter 12, SQL Interface Installation, on installing SQL Interface.

The `locale` directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Updating the Environment Settings (All UNIX Systems)

The installation program does not update the environment files `.cshrc` or `.profile`. Because the format of these files varies depending on the shell you use, you need to update the appropriate file for your system manually.

---

### Setting the `$ARBORPATH` Variable (Mandatory)

The installation program creates a file, `essbaseenv.doc`, with the shared library information you need in your global environment. If you installed Essbase to `/home/essbase`, you see the following:

```
ARBORPATH=/home/essbase
```

where `home` is the name of your home directory, and `essbase` is the name of your Essbase directory.

You need to add this setting to your environment in the appropriate format for your system. For example:

In the C shell environment, you might add the following to your `.cshrc` environment file:

```
setenv ARBORPATH "/home/essbase"
```

In the Bourne shell environment, add the following to your `.profile` environment file:

```
ARBORPATH=/home/essbase; export ARBORPATH
```

---

## Setting the Library Path Variables (Mandatory)

You need to update the your system's library path setting to include the *ARBORPATH/bin* directory. You need to add this setting to your environment in the appropriate format for your system.

---

### **Solaris**

On Solaris, you need to update the `LD_LIBRARY_PATH` setting to include the *ARBORPATH/bin* directory.

In the C shell environment, set the `LD_LIBRARY_PATH` path as follows:

```
setenv LD_LIBRARY_PATH "/usr/openwin/lib:/usr/lib:$ARBORPATH/bin"
```

In the Bourne shell environment, set the `LD_LIBRARY_PATH` as follows:

```
LD_LIBRARY_PATH=/usr/openwin/lib:/usr/lib:$ARBORPATH/bin;  
export LD_LIBRARY_PATH
```

**Note:** The actual path you specify depends on your environment.

---

### **HP-UX**

On HP-UX, you need to update the `SHLIB_PATH` setting to include the *ARBORPATH/bin* directory.

In the C shell environment, use the following command:

```
setenv SHLIB_PATH "$SHLIB_PATH:$ARBORPATH/bin"
```

In the Bourne shell environment, use the following command:

```
SHLIB_PATH=$SHLIB_PATH:$ARBORPATH/bin; export SHLIB_PATH
```

---

### **AIX**

On AIX, you need to update the `LIBPATH` setting to include the *ARBORPATH/bin* directory.

In the C shell environment, add the following:

```
setenv LIBPATH "$LIBPATH:$ARBORPATH/bin"
```

In the Bourne shell environment, add the following:

```
LIBPATH=$LIBPATH:$ARBORPATH/bin; export LIBPATH
```



---

## Using the Set Path Command (Optional)

For convenience, you might want to issue a `set path` command so you can quickly get to the Essbase directory. For example:

In the C shell environment:

```
set path=($path $ARBORPATH/bin)
```

In the Bourne shell environment:

```
PATH=$PATH:$ARBORPATH/BIN; export PATH
```

Now, from the UNIX command prompt, you can get to your Essbase directory by issuing the following command:

```
cd $ARBORPATH
```

---

## Removing Extraneous Files (All UNIX Systems, Optional)

As an option, you can remove extraneous files from the `/home/essbase` directory and the temporary directory.

**Note:** This section assumes you installed Essbase to the default directory, `/home/essbase`.

When you install the Essbase server, the `server.tz` file(s) are moved to the `/home/essbase` directory and the `readme.txt` file is moved to the `/home/essbase/bin` directory. When `server.tz` file(s) are decompressed, the decompressed files are stored momentarily in the `/home/essbase` directory, then moved to the appropriate directory. If you choose to not install an option, such as the sample applications, or if you have not licensed an option, such as the currency conversion, extra files will be left in the `/home/essbase` directory after installation. In any case, the `server.tz` file(s) are left there.

When installation is complete, you can delete any files in the temporary directory. You can also delete from `/home/essbase` all files that have not been moved into subdirectories, including the `server.tz` file(s). However, do *not* delete any subdirectories under `/home/essbase`, or any files in those subdirectories.

---

## Starting the Essbase Server

You can start the Essbase server from the foreground or from the background.

---

### Before You Start the Essbase Server

Before you can access the Essbase server:

- You must be logged in to the server on an account that has at least Read/Write/Execute access to the Essbase directories.
- The proper network protocol must be installed and running on your UNIX workstation. For information on network protocols, see Chapter 14, Network Configuration Notes.

*Note:* You do not have to be logged in as `arbor`, although you do have to be logged on as `arbor` to install server products from the CD-ROM.

---

### Starting the Essbase Server in the Foreground

To start the Essbase server in the foreground:

1. From the command prompt, type

```
$ARBORPATH/bin/ESSBASE
```

or, if your path includes `$ARBORPATH/bin`, type

```
ESSBASE
```

If you encounter any errors during startup:

- Check your path and environment settings.
- Make sure the appropriate network protocol is installed and running on your UNIX machine.

## 2. Do one of the following:

If this is a first-time installation, enter the following items:

- Company name. The name you enter is embedded in your server license registration.
- Your name. The name you enter is designated as the Essbase System Supervisor. Use this name for your initial login from the Hyperion Essbase Application Manager.
- System password. This password is required when you start the Essbase server. It is also required to gain access to the server from the Application Manager using the Supervisor account.

You are asked to confirm your choices. Type **Y** to verify your entries, or **N** to retype them.

See Chapter 6, Application Manager Installation, for information on the Application Manager.

If this is not a first-time installation, enter the system password that you specified when you first ran Essbase.

The Essbase window then displays the following message:

```
Waiting for Client Requests...
```

You can now use the Essbase window to perform high-level supervisor operations. See “Console Operations” on page 5-13 for a list of available commands.

## Starting the Essbase Server in the Background

To start the Essbase server as a background process:

From the command prompt, type

```
$ARBORPATH/bin/ESSBASE password -b &
```

or, if your path already includes `$ARBORPATH/bin`, type

```
ESSBASE password -b &
```

You can start Essbase without using the ampersand (&) at the end of the command, but the command prompt is not returned after the server is started.

---

## Shutting Down the Essbase Server

To shut down the server from any terminal connected to it, use the SHUTDOWNSERVER command in ESSCMD.

**Note:** For more information on starting and stopping the Essbase server, see Chapter 44 of the *Database Administrator's Guide*, and the online *Technical Reference*, included with your Application Manager installation.

---

## Console Operations

Essbase has a server console called the *Agent*. When you start the main Essbase program (ESSBASE), the Agent window appears. This window acts as a console for high-level server operations. Pressing the Enter key in the Agent window provides a list of all available commands.

You can use the following commands in the Agent window:

**Table 5-4, Essbase Server Agent Window Commands**

Commands	Description
START APPNAME	Starts the specified application.
STOP APPNAME	Stops the specified application.
USERS	Displays a list of all users that are connected to the server. The total number of connections is displayed, as well as the number of ports available.
LOGOUTUSER USER	Disconnects a user from the server and frees a port. This command requires the Essbase system password.
PASSWORD	Changes the system password that is required to start the Essbase server. Changing this password doesn't change the Essbase System Supervisor's password. This command requires the Essbase system password.
VERSION	Displays the server software version number.
HELP	Lists all valid Agent commands and their respective functions.
PORTS	Displays the number of ports that are installed on the server and how many are in use.

**Table 5-4, Essbase Server Agent Window Commands**

Commands	Description
DUMP <i>FILENAME</i>	Dumps information from the Essbase security system to a specified file in ASCII format. If you don't supply a path with the file name, the file is saved to the \ESSBASE\BIN directory (/essbase/bin on UNIX systems). This command requires the Essbase system password.
QUIT/EXIT	Shuts down all open applications and quits Essbase.

To learn about the Agent, see Chapter 44 of the *Database Administrator's Guide*.

---

## What's Next?

When you have successfully started the Essbase server, install the Application Manager on a client PC to verify you can connect to the Essbase server from the Application Manager.

**Note:** See Chapter 6, *Application Manager Installation*, for information on the Application Manager.

If you installed the sample applications, you need to load data into them. The sample applications are provided as examples of basic Essbase databases. The *Spreadsheet Add-in User's Guide* uses the Sample Basic database in a step-by-step tutorial on the spreadsheet features.

**Note:** See Chapter 7, *Sample Applications*, for information on loading data into the sample applications and preparing them for use.

---

## Chapter 6

# Application Manager Installation

This chapter tells you, the client PC user, how to install the Hyperion Essbase Application Manager from a network drive, and connect to the Hyperion Essbase OLAP Server. It describes how to do the following:

- Install the Application Manager to the Windows 95, Windows 98, and Windows NT 3.51 and 4.0 client operating environments
- Manually update your client environment settings if you don't want the installation program to change your environment
- Start the Application Manager

To install the Application Manager from CD-ROM, see Chapter 2, CD-ROM Installation.

This chapter contains the following sections:

- "Before You Install" on page 6-2
- "Upgrading from Essbase 4.x" on page 6-2
- "About Installing the Application Manager from a Network Drive" on page 6-4
- "Installing the Application Manager on Your Client PC's Hard Drive" on page 6-7
- "Setting up Your PC to Run the Application Manager on the Network Drive" on page 6-10
- "Changing the Network Protocol" on page 6-13
- "Manually Updating Your Environment Settings" on page 6-14
- "Running the Application Manager" on page 6-17
- "Connecting to the Server" on page 6-18
- "Troubleshooting Steps" on page 6-20

---

## Before You Install

Before you can install the Application Manager from a network drive, it must be installed to a network drive.

*Note:* Essbase System Administrators, see Chapter 2, CD-ROM Installation, on installing the Application Manager to a network drive from the CD-ROM.

The Application Manager requires a Windows- or Windows NT-based PC with the following:

**Table 6-1, Application Manager Windows System Requirements**

Component	Requirement
Microprocessor	486 or higher
Windows Version	Windows 95, Windows 98, or Windows NT 3.51 or 4.0
RAM	16 MB
Disk Space	20 MB
Network Protocol	TCP/IP or Named Pipes

Also, you should know the following before installing the Application Manager from a network drive:

- Your client operating environment: Windows 95, Windows 98, or Windows NT 3.51 or 4.0
- The network protocol you use
- Where the Application Manager software resides on the network

---

## Upgrading from Essbase 4.x

You can use the Version 4 Application Manager with a Version 5 server, but the Version 4 Application Manager lacks the features of Version 5. For example, you cannot save members tagged as Dynamic Calc with the Version 4 Application Manager. Running the Version 4 Application Manager with a Version 5 server is supported, but is not recommended. Running Version 4 of the Essbase server with any Version 5 client software does not work and is not supported.

You can also use the Version 4 Hyperion Essbase Spreadsheet Add-in with a Version 5 server, but the Version 4 Add-in lacks or cannot access the new features of Version 5.

**Warning:** Do *not* modify Version 5 outlines with the Version 4 Application Manager. If you save a Version 5 database outline that contains new Version 5 features, such as a Dynamic Calc tag, with the Version 4 Outline Editor, the new features are stripped from the outline.

When you install a Version 5 client, the default directory for installation is C:\ESSBASE, just as it was for Essbase 4.x. Using C:\ESSBASE is recommended.

Unless you choose to update them yourself, the client installation program updates your \$ARBORPATH variable to point to the new Essbase directory, and your PATH to include the BIN directory beneath the new Essbase directory.

To successfully install Version 5 clients, do the following:

- Install all your clients in the same directory. This includes the Hyperion Essbase Application Manager, Spreadsheet Add-in, and Hyperion Essbase SQL Drill-Through.
- If you install one Version 5 client, make all your clients (on the same machine) Version 5. This includes the Application Manager, Spreadsheet Add-in, and SQL Drill-Through.

**Note:** Version 5 clients share .DLL files that may not work with earlier clients.

- Use equal versions of SQL Drill-Through and SQL Interface. For example, if you install Version 5.0.2 of SQL Drill-Through, and if you access the data source through the Essbase server and Hyperion Essbase SQL Interface, you must use Version 5.0.2 of SQL Interface.
- Move any client application files you have created to the new location. For example, if your old installation was C:\ESSBASE4, and your new installation is C:\ESSBASE5, copy the C:\ESSBASE4\CLIENT directory, and its subdirectories and files, to C:\ESSBASE5\CLIENT. Using DOS, you can use the following command:

```
XCOPY C:\ESSBASE4\CLIENT\*.* C:\ESSBASE5\CLIENT\*.* /S
```

When you have successfully copied it, you can delete the old CLIENT directory.

See the *Start Here* booklet for information about migrating your server and databases.



## About Installing the Application Manager from a Network Drive

When installing from a network drive, the Application Manager installation program provides the following options:

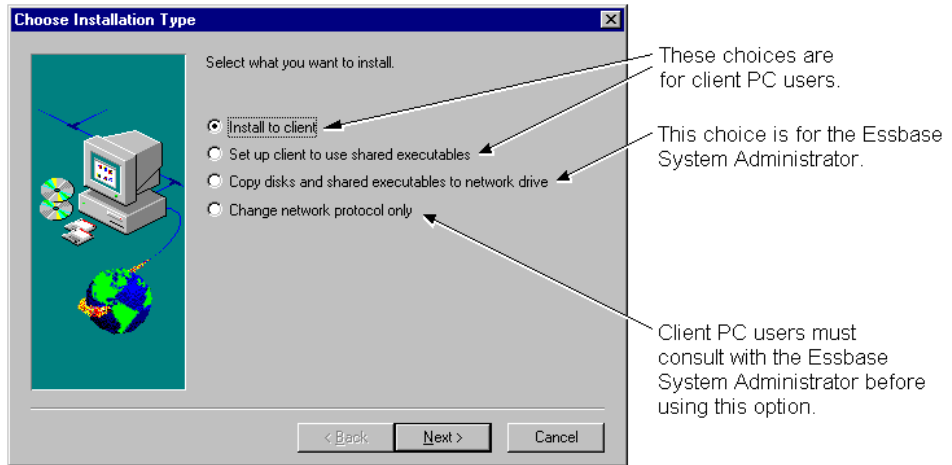


Figure 6-1, Four Application Manager Installation Options

The first two options, **Install to client** and **Set up client to use shared executables**, give you, the client PC user, the following ways to install the Application Manager:

- **Install to client** installs the Application Manager software on your client PC's hard drive, so you can run it locally. See "Installing the Application Manager on Your Client PC's Hard Drive" on page 6-7 to learn about this option.
- **Set up client to use shared executables** sets up your client PC's operating environment to run the Application Manager previously installed on a network drive by the Essbase System Administrator. You install only Windows or Windows NT system files on your client PC's hard drive. See "Setting up Your PC to Run the Application Manager on the Network Drive" on page 6-10 to learn about this option.

The third option, **Copy files and shared executables to network drive**, lets the Essbase System Administrator install the Application Manager to a network drive, so you, the client PC user, can either install and run it on your PC's hard drive, or run it on the network drive.

**Note:** Essbase System Administrators, see Chapter 2, CD-ROM Installation, on installing the Application Manager to a network drive. Client PC users, do *not* select the third option unless authorized by the Essbase System Administrator.

The fourth option, **Change network protocol only**, lets you install a different network protocol file for your Application Manager, after you have installed the Application Manager.

**Note:** Client PC users, do *not* select this option if you set up your PC's operating environment to run the Application Manager on the network drive. All users running—and sharing—the Application Manager on a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

---

## Network Protocol Files for the Application Manager

The network protocol file implements the TCP/IP or Named Pipes protocol you selected on installing the Application Manager (or other client software) on your client PC's hard drive, or that the Essbase System Administrator selected on installing the Application Manager (or other client software) to a network drive. The network protocol for 32-bit clients, such as Excel 95 or Excel 97, is `ESSNET.DLL`. The network protocol file resides in the `BIN` directory with the Application Manager software. This can be on your client PC's hard drive or on a network drive, depending on which installation option you chose.

**Note:** For more information on network protocols, see Chapter 14, Network Configuration Notes.

---

## Directories and Files on the Network Drive

When the Essbase System Administrator installs the Application Manager to a network drive, the installation program, `SETUP . EXE`, installs the following files on the network drive:

- An installation directory for installing the Application Manager on your client PC's hard drive, and
- Program files for running the Application Manager on the network drive.

The Essbase installation program (`SETUP . EXE`), and Windows and Windows NT system files for setting up your PC's environment, are also installed.

If the Essbase System Administrator installs the Application Manager to the network drive `N`, and accepts the default directory `\ESSBASE`, the installation program creates the following installation directory for Application Manager:

```
N: \ESSBASE
    APPMAN
```

The installation program for client PC users, `SETUP . EXE`, is in the `APPMAN` directory.

The installation program creates the following additional directories for the program files for the Application Manager:

```
    BIN
    CLIENT
    LOCALE
```

The Application Manager program files are in the `BIN` directory. This includes the executable file `ESSADMIN . EXE`.

If the Essbase System Administrator also installs the online HTML documentation, a `DOCS` directory is also created. It contains numerous subdirectories, as well as the `INDEX . HTM` file you open to view the HTML documentation. To learn more about HTML documentation, see "Viewing Essbase HTML Documents" on page xviii in the Introduction.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Installing the Application Manager on Your Client PC's Hard Drive

To install the Application Manager on your client PC's hard drive, do the following:

1. Run `SETUP.EXE`:

- **From Windows 95, Windows 98, or Windows NT 4.0:**

- a. Click the **Start** button.
- b. Choose Settings | Control Panel.
- c. In the Control Panel, double-click **Add/Remove Programs**.
- d. Click **Install**, and then click **Next**.
- e. When the program prompts for the command line, specify the following:

`N:\ESSBASE\APPMAN\SETUP.EXE`

where `N:\ESSBASE` is the name of the network drive and directory where your Essbase System Administrator installed the Application Manager.

- **From the Program Manager in Windows NT 3.51,** choose File | Run, then type the following:

`N:\ESSBASE\APPMAN\SETUP.EXE`

where `N:\ESSBASE` is the name of the network drive and directory where your Essbase System Administrator installed the Application Manager.

2. Follow the directions on your screen.

3. When the program prompts you to **Choose Installation Type**, choose **Install to client**.

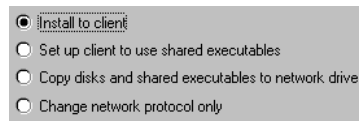


Figure 6-2. Choosing to Install the Application Manager on Your Client PC's Hard Drive

- When the program prompts you to **Choose Network Protocol**, choose a network protocol. See your Essbase System Administrator if you're not sure which option to choose.

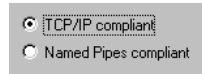


Figure 6-3. Choosing a TCP/IP Network Protocol for the Application Manager

- When the program prompts whether to **Install Documentation?**, choose to not install the online HTML documentation, and click **Next**.

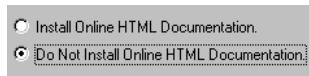


Figure 6-4. Choosing Not to Install the Online HTML Documentation

**Note:**

It is recommended that your Essbase System Administrator install or copy the online HTML documentation to a network drive, so that all client users can access it from there. The installation program creates an `\ESSBASE\DOCS` directory with numerous subdirectories. To view the documentation, open the `INDEX.HTM` file in the `DOCS` directory. You can also access the HTML documentation in the `DOCS` directory of the CD-ROM itself. To learn more about HTML documentation, see “Viewing Essbase HTML Documents” on page xviii in the Introduction.

- When the program prompts for **Installation Location**, specify the directory where you want to install the Application Manager.

The default is `C:\ESSBASE`. Click **Browse** to specify a different location.

Install all client software in the same directory. See “Upgrading from Essbase 4.x” on page 6-2 for more information.

- When the program prompts for **Confirmation** of what to install and where to install it, click **No** if you want to change your selection. Click **Yes** to accept it.
- When the program prompts whether to **Update Environment?**, click **Yes**.

If you don't want the installation program to update your environment, you can update it yourself. See “Manually Updating Your Environment Settings” on page 6-14.

**Note:**

If your `PATH` statement appears on multiple lines in the `AUTOEXEC.BAT` file, Essbase adds `\ESSBASE\BIN` to the last line. If you have a previous installation of Essbase in another directory that appears on an earlier line of the `PATH` statement, you must remove it.

9. If your PC was not previously configured to the correct path, reboot your PC. This lets the changes to your environment take effect. You might not need to reboot if you previously installed client software to the same directory where you are installing the Application Manager.

---

## Directories Created When You Install the Application Manager on Your Client PC's Hard Drive

When you install the Application Manager on your Client PC's hard drive, the installation program, `SETUP . EXE`, creates the following directories on your client PC's hard drive:

```

ESSBASE
  BIN
  CLIENT
  LOCALE

```

The Application Manager program files are in the `BIN` directory. This includes the executable file `ESSADMIN . EXE`.

If you create applications and databases, and store them on your PC's hard drive, they reside in the `CLIENT` directory as follows:

```

CLIENT
  APPNAME
    DBNAME

```

where *APPNAME* is the name of your application and *DBNAME* is the name of your database.

If you also install the online HTML documentation, a `DOCS` directory is also created. It contains numerous subdirectories, as well as the `INDEX . HTM` file you open to view the HTML documentation. To learn more about HTML documentation, see "Viewing Essbase HTML Documents" on page xviii in the Introduction.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

## Setting up Your PC to Run the Application Manager on the Network Drive

To set up your PC to run the Application Manager on the network drive, do the following.

1. Run `SETUP . EXE`:
  - **From Windows 95, Windows 98, or Windows NT 4.0, do the following:**
    - a. Click the **Start** button.
    - b. Choose Settings | Control Panel.
    - c. In the Control Panel, double-click **Add/Remove Programs**.
    - d. Click the **Install** button, and then click the **Next** button.
    - e. When the program prompts for the command line, specify the following:
 

```
N:\ESSBASE\APPMAN\SETUP . EXE
```

where *N:\ESSBASE* is the name of the network drive and directory where your Essbase System Administrator installed the Application Manager.
  - **From the Program Manager in Windows NT 3.51, choose File | Run, then type the following:**

```
N:\ESSBASE\APPMAN\SETUP . EXE
```

where *N:\ESSBASE* is the name of the network drive and directory where your Essbase System Administrator installed the Application Manager.
2. Follow the directions on your screen.
3. When the program prompts you to **Choose Installation Type**, choose **Set up client to use shared executables**.

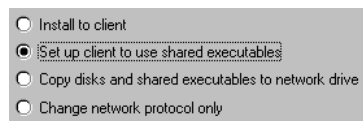


Figure 6-5. Choosing to Set Up Your PC to Run the Application Manager on the Network Drive

4. When the program prompts whether to **Install Documentation?**, choose to not install the online HTML documentation, and click **Next**.

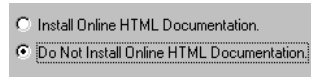


Figure 6-6, Choosing Not to Install the Online HTML Documentation

**Note:** It is recommended that your Essbase System Administrator install or copy the online HTML documentation to a network drive, so that all client users can access it from there. The program creates an `\ESSBASE\DOCS` directory with numerous subdirectories. To view the documentation, open the `INDEX.HTM` file in the `DOCS` directory. You can also access the HTML documentation in the `DOCS` directory of the CD-ROM itself. To learn more about HTML documentation, see “Viewing Essbase HTML Documents” on page xviii in the Introduction.

5. The program detects where the network installation of the Application Manager resides. If it cannot find it, you are prompted for the directory. Click **Browse** to specify the location.

**Note:** The Essbase shared executable files are in the `BIN` directory.

6. When the program prompts for **Confirmation** of what to install and where to install it, click **No** if you want to change your selection. Click **Yes** to accept it.
7. When the program prompts whether to **Update Environment?**, click **Yes**.

If you don't want the installation program to update your environment, you can update it yourself. See “Manually Updating Your Environment Settings” on page 6-14.

**Note:** If your `PATH` statement appears on multiple lines in the `AUTOEXEC.BAT` file, Essbase adds `\ESSBASE\BIN` to the last line. If you have a previous installation of Essbase in another directory that appears on an earlier line of the `PATH` statement, you must remove it.

8. If your PC was not previously configured to the correct path, reboot your PC.

This lets the changes to your environment take effect. You might not need to reboot if you previously installed client software to the same directory where you are installing the Application Manager.



---

## Directories Used When You Set Up Your PC's Operating Environment to Run the Application Manager on the Network Drive

When you set up your PC to run the Application Manager on the network drive, the installation program, `SETUP . EXE`, does not create any directories on your client PC's hard drive. It installs only Windows or Windows NT system files on your client PC's hard drive. You run the program files that are on the network drive.

The network drive has the following directories:

```
ESBASE
  BIN
  CLIENT
  LOCALE
```

The Application Manager program files are in the `BIN` directory. This includes the executable file `ESSADMIN . EXE`.

If you create applications and databases, and store them on the network drive, they reside in the `CLIENT` directory as follows:

```
CLIENT
  APPNAME
  DBNAME
```

where *APPNAME* is the name of your application and *DBNAME* is the name of your database.

If you also install the online HTML documentation, a `DOCS` directory is also created. It contains numerous subdirectories, and the `INDEX . HTM` file you open to view the HTML documentation. To learn more about HTML documentation, see "Viewing Essbase HTML Documents" on page xviii in the Introduction.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

## Changing the Network Protocol

To install a different network protocol file for the Application Manager, if you installed it on your client PC's hard drive, follow the steps in this section.

**Note:** Client PC users, do *not* select this option if you set up your PC's operating environment to run the Application Manager on the network drive. All users running—and sharing—the Application Manager on a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

1. Follow steps 1 and 2 of “Installing the Application Manager on Your Client PC's Hard Drive” on page 6-7.
2. When the program prompts you to **Choose Installation Type**, choose **Change network protocol only**.

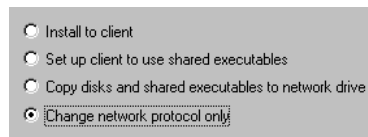


Figure 6-7. Choosing to Change the Network Protocol

3. When the program prompts you to **Choose Network Protocol**, choose a network protocol. See your Essbase System Administrator if you're not sure which option to choose.

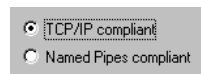


Figure 6-8. Choosing a TCP/IP Network Protocol for the Application Manager

4. When the program prompts you for **Installation Location**, specify the directory where you installed the Application Manager on your client PC's hard drive; for example, `\ESSBASE\BIN`.
5. When the program prompts for **Confirmation**, click **No** if you want to change your selection. Click **Yes** to accept it.

---

## Manually Updating Your Environment Settings

If you don't want the installation program to update your PC's environment, you need to set up the environment manually.

Keep these points in mind as you apply the following steps to manually update your environment settings:

- If you installed the Application Manager to `C:\ESSBASE`, simply do the following steps.
- If you installed the Application Manager to a different drive and directory, substitute the letter of that drive and name of that directory.
- If you set up your PC's operating environment to run the Application Manager on a network drive, substitute the letter of the drive and name of the directory where the Application Manager is installed on the network.

---

## Setting Your Environment on Windows 95 and Windows 98

To update your environment settings on Windows 95 and Windows 98, do the following:

1. Add the following environment variable to your `AUTOEXEC.BAT` file:

```
ARBORPATH=C:\ESSBASE
```

Do not put a space before or after the equals sign (=) in the `ARBORPATH` environment setting.

2. Add `C:\ESSBASE\BIN` to your `PATH` statement.
3. Remove references to installations of Essbase in other directories.

**Tip:**

You can type `SET` from a DOS command prompt to view your current environment settings.

4. Reboot your PC.

---

## Setting Your Environment on Windows NT 3.51

To update your environment settings on Windows NT 3.51, do the following:

1. Start the Control Panel.
2. Double-click the System icon. The **System** dialog box appears.
3. Look for an existing `ARBORPATH` setting in the **System Environment Variables** list box.

If the setting is there, select it, then do the following:

- a. Change the information in the **Value** text box to `C:\ESSBASE`.
- b. Click **Set**.

If the setting is not there, do the following:

- a. Type `$ARBORPATH` in the **Variable** text box. Do NOT type an equals sign (=).
- b. Type `C:\ESSBASE` in the **Value** text box.
- c. Click **Set**.

**Note:** You are changing *system* settings, which affect all users who access your machine.

4. Look for an existing `PATH` setting in the **System Environment Variables** list box. Select it, then do the following:
  - a. Remove any outdated `ARBOR` or `ESSBASE` directories from the list in the **Value** text box.
  - b. Add `C:\ESSBASE\BIN` to the list of directories in the path in the **Value** text box. Use a semi-colon if necessary to separate directory names.
  - c. Click **Set**.
5. Click **OK** to close the **System** dialog box.
6. Close the Control Panel.
7. Log out and log in again, or reboot your PC.

---

## Setting Your Environment on Windows NT 4.0

To update your environment settings on Windows NT 4.0, do the following:

1. Click the **Start** button on your desktop.
2. Choose Settings | Control Panel.
3. Double-click the System icon. The **System Properties** dialog box appears.
4. Click the **Environment** tab.
5. Look for an existing ARBORPATH setting in the **System Variables** list box.

If the setting is there, select it, then do the following:

- a. Change the information in the **Value** text box to C:\ESSBASE.
- b. Click **Set**.

If the setting is not there, do the following:

- a. Type ARBORPATH in the **Variable** text box. Do *not* type an equals sign (=).
- b. Type C:\ESSBASE in the **Value** text box.
- c. Click **Set**.




**Note:** You are changing system settings, which affect all users who access your machine.

6. Look for other, outdated ARBOR or ESSBASE settings in the **System Variables** list box. If one is there, select it, then do the following to remove it:
  - a. Click the **Delete** button.
  - b. Click **Set**.
7. Click OK to close the **System Properties** dialog box.
8. Close the Control Panel.
9. Log out and log in again, or reboot your PC.

## Running the Application Manager

After you install the Application Manager on your hard drive, or set up your operating environment to run the Application Manager on the network drive, reboot and start Windows or Windows NT. The Application Manager icon appears on your desktop, and the following icons appear when you select Hyperion Essbase 5.0.x on the Start | Programs menu:

**Table 6-2, Program Icons**

Icon	Program	Where To Get Information
	Application Manager	<i>Database Administrator's Guide</i>
	ESSCMD	<i>Database Administrator's Guide</i>
	Application Manager Online Help	Click the Help button in any dialog box.

To run the Application Manager, double-click the Application Manager program icon, or choose Start | Programs | Hyperion Essbase 5.0.x | Essbase Application Manager.

The Application Manager desktop appears:



*Figure 6-9, Hyperion Essbase Application Manager Desktop*

If your \$ARBORPATH environment variable is not correct or if the ESSBASE.MDB file is missing, you see the following error message when you start the Application Manager:

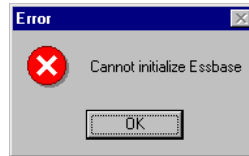


Figure 6-10, Cannot Initialize Essbase Error Message

---

## Connecting to the Server

After you start the Application Manager, try connecting to the Essbase server to verify that you can establish a connection. To connect to the server:

1. Choose Server | Connect to open the **Essbase System Login** dialog box.

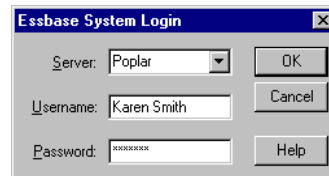


Figure 6-11, Logging in Using the Server Name

2. Choose the server name to connect to, from the **Server** list box, or enter it in the **Server** text box. The server name is defined by the server operating system and by the network protocol. In Figure 6-11, for example, the server name is Poplar.

An alternate way to enter the server name, if you use TCP/IP, is to enter its IP address. See “Specifying an IP Address as a Server Name” on page 6-19 for more information. See your network administrator for your server’s IP address.

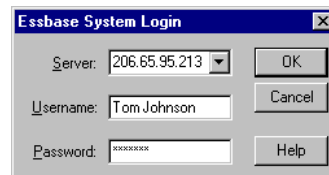


Figure 6-12, Logging in Using the Server IP Address

3. Enter your user name and password in the text boxes. If you don't know your user name and password, or if you are unable to connect to the server, contact your Essbase System Administrator. If you or the Essbase System Administrator just installed the Essbase server software, the only user that exists on the server is the user name of the Essbase System Supervisor and you should use the Essbase system password. See the installation chapter for your server for more information.
4. Click **OK**. The Application Desktop window appears on the Application Manager desktop. For example, if the server name is Poplar, the desktop appears as follows:

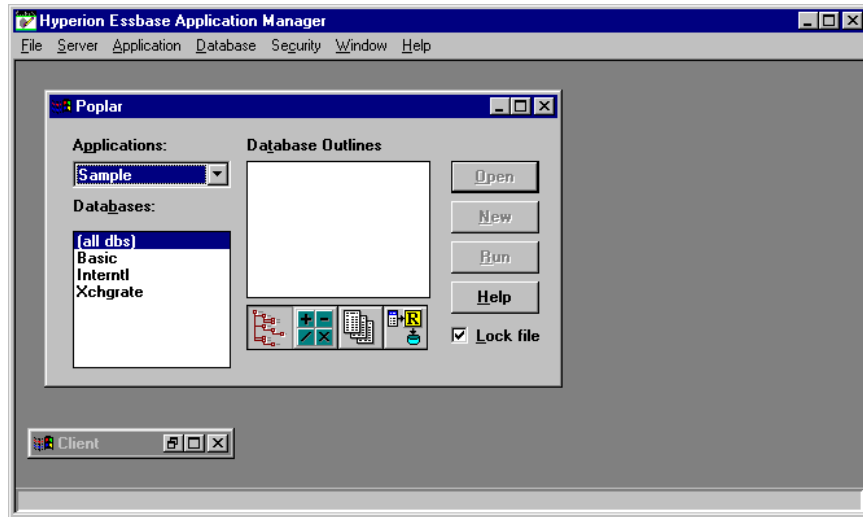


Figure 6-13. Application Desktop Window for the Poplar Server

**Note:** If you cannot connect to the server, see “Troubleshooting Steps” on page 6-20.

## Specifying an IP Address as a Server Name

When connecting to an Essbase server from any Essbase client, you normally use the server machine's computer name, as defined by the operating system. You can also use the IP address of the server machine, if it is a TCP/IP-enabled machine.

From ESSCMD, or from any client login dialog box, you can enter the IP address in place of the server name. Enter the IP address in dotted notation as follows:

A . B . C . D

where A, B, C, and D are integers in decimal, hexadecimal, or octal format.



To specify an IP address using decimals, simply enter the IP address, beginning with any digit except 0 (zero). For example,

149.22.15.154

To specify an IP address using octals, enter the IP address with a leading 0 (zero). For example,

0225.26.17.232

To specify an IP address using hexadecimals, enter the IP address with a leading 0x or 0X. For example,

0x95.16.F.9A

---

## Troubleshooting Steps

This section helps you determine why you cannot connect to the server and how to correct the problem.

- The Application Manager can find the server machine, but cannot connect to the Essbase server. This error can appear if Essbase is not running on the server, or if the network protocols for the server and the client are different, or are not correctly installed and running.

In this case, the following error box appears:

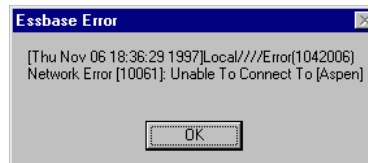


Figure 6-14, Cannot Locate Essbase on the Server Machine

If this happens:

- a. Reboot your client PC and try again.
- b. Verify that Essbase is running on the server machine.
- c. Ensure that your network protocol is correctly installed. See “Checking Your Network Protocol” on page 6-21.

- The Application Manager cannot find the server name you entered. This error can appear if you enter an invalid server name, or if the network protocols for the server and the client are different, or are not correctly installed and running. In this case, the following error box appears:

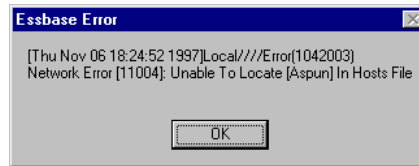


Figure 6-15, Cannot Locate the Server Machine

If this happens:

- Reboot your client PC and try again.
  - Verify that the server name you entered is correct.
  - Ensure that your network protocol is correctly installed. See “Checking Your Network Protocol” on page 6-21.
- A similar error, “Network Error: Unable to connect to *server-name*,” appears if the network protocols for the server and the client are different, or are not correctly installed and running.

If this happens:

- Reboot your client PC and try again.
- Ensure that your network protocol is correctly installed. See “Checking Your Network Protocol” on page 6-21.

---

## Checking Your Network Protocol

If you suspect that the network protocol for the Application Manager is not correctly installed, do the following:

1. See “Changing the Network Protocol” on page 6-13 in this chapter.
2. See Chapter 14, Network Configuration Notes, for more information on network protocols.
3. See your network protocol vendor documentation for more detailed information.

**Note:** Client PC users, do not change the network protocol if you set up your PC’s operating environment to run the Application Manager on the network drive. All users running—and sharing—the Application Manager on a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

The Hyperion Essbase OLAP Server installation includes four sample applications.

- The main application used in the documentation is called Sample. It contains three databases: Basic, Interntl, and Xchgrate. The latter two contain specific features corresponding to the Hyperion Essbase Currency Conversion option.
- The second application, called Demo, contains one database, Basic, referred to in the online *Technical Reference* in your DOCS directory and in the documentation for the Essbase Report Writer.
- The third application, called Samppart, is the first of two applications designed to show the features of Hyperion Essbase Partitioning. Samppart contains a Company database that is the target of a partitioned database.
- The fourth application, called Sampeast, is the second of two applications designed for Partitioning. Sampeast contains an East database that is the source of data for a partitioned database.

**Note:**

In some licensing instances, installation of the four sample applications may be restricted to the main application (Sample) and its three databases (Basic, Interntl, and Xchgrate). Please refer to your license agreement for details.

If you chose to install the sample applications during your server installation, then you must perform additional steps to prepare them for use in your organization. This chapter contains the following sections:

- “Accessing the Sample Applications” on page 7-2
- “Preparing the Sample Basic Database” on page 7-4
- “Preparing the Sample Interntl Database” on page 7-8
- “Preparing the Sample Xchgrate Database” on page 7-10
- “Preparing the Demo Basic Database” on page 7-12
- “Providing User Access to the Sample Applications” on page 7-14
- “Setting the Environment for the Partitioning Sample Applications” on page 7-15

- “Preparing the Samppart Company Database” on page 7-25
- “Preparing the Sampeast East Database” on page 7-27

## Accessing the Sample Applications

If you are upgrading your server installation from a release of Essbase prior to Version 5, you might not see the Version 5.x sample applications in the Application Desktop window the first time you restart the Essbase server and Hyperion Essbase Application Manager, even if you installed the sample applications.

Even though they exist in your server’s `\ESSBASE\APP` directory, the Hyperion Essbase Agent hasn’t yet been informed that these applications exist. This occurs because the installation program doesn’t modify your Essbase security file (`ESSBASE.SEC`). The security file maintains the current list of applications and databases on your server, and all user and security definitions.

To obtain access to the Essbase sample applications in Version 5.x, complete the following steps:

1. Open the Application Manager.
2. Connect to the server in which the sample applications are installed. See Chapter 6, Application Manager Installation, if you’re unsure how to do this.
3. In the Application Desktop window, view the list of available applications in the **Applications** list box.

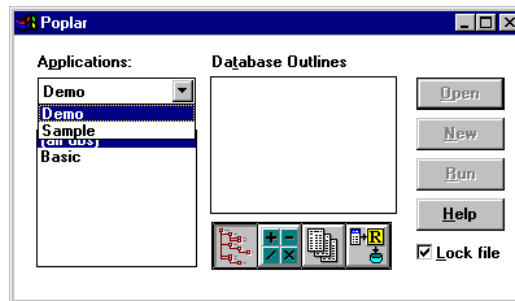


Figure 7-1, Viewing Available Applications in the Application Desktop Window

The list of applications should match the subdirectories in the `\ESSBASE\APP` directory of your server machine. Make a note of the applications missing from the list.

This example assumes that Samppart and Sampeast are missing from the list of applications.

4. Choose File | New | Application. The **Create New Application** dialog box appears.
5. In the **Application name** text box, enter `Samppart`.

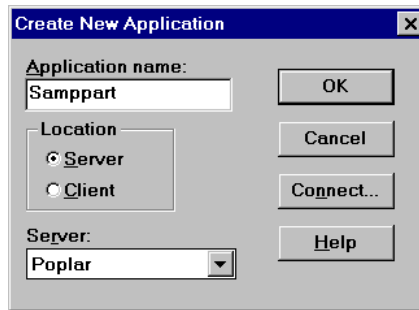


Figure 7-2, Entering `Samppart` in the **Create New Application** Dialog Box

6. Click **OK**. Essbase recognizes and loads the application.  
If you are attempting to create an application that already exists and is already accessible from the Application Manager, you see the following error:

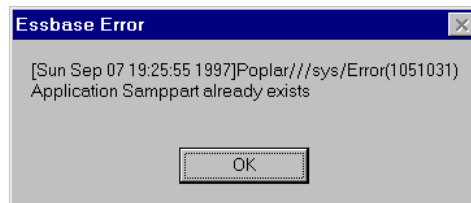


Figure 7-3, Error Message When Trying to Create an Existing Application

7. Choose File | New | Application. The **Create New Application** dialog box appears.
8. In the **Application name** text box, enter `Sampeast`.
9. Click **OK**. Essbase recognizes and loads the application.

If necessary, repeat steps 4–6 for each application you need to access, substituting the appropriate application name where appropriate, such as `Sample` or `Demo`.

When you have access to the sample applications, you are ready to prepare them for use by other users.

---

## Preparing the Sample Basic Database

The first database in the Sample application is called Basic. To prepare it for use, you need to load data into it. Complete the following steps:

1. Open the Application Manager.
2. Connect to the server in which the Sample application is installed. This example uses a server called Poplar. See Chapter 6, Application Manager Installation, if you're unsure how to do this.
3. Select the application called `Sample` from the **Applications** list box.
4. Select the database called `Basic` from the **Databases** list box.

Your screen should look similar to this:

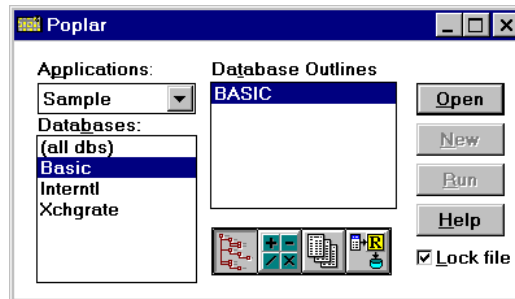


Figure 7-4, Selecting the Basic Database

5. Choose Database | Load Data. The **Data Load** dialog box appears:

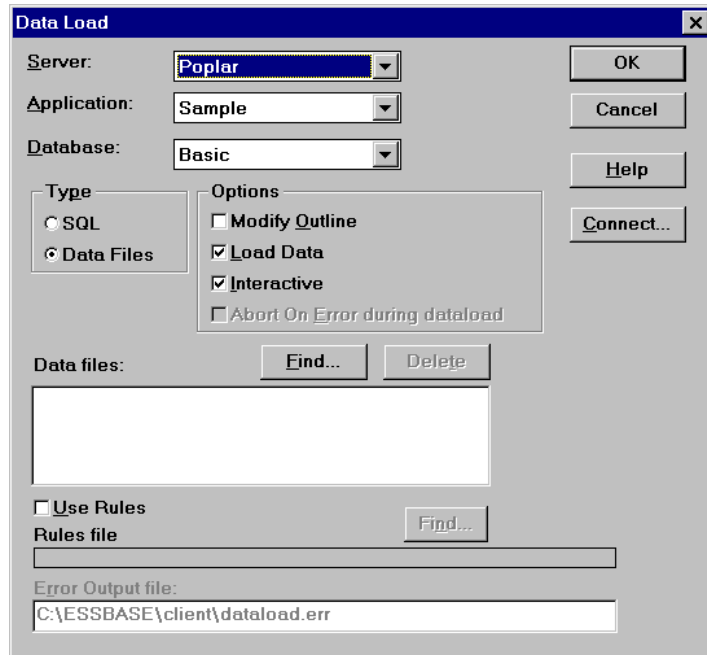


Figure 7-5, Data Load Dialog Box Before Selecting a Data File

The **Data Load** dialog box is described in detail in the *Database Administrator's Guide*.

6. Click the **Find** button above the **Data files** list box to locate a data file to load. The **Open Server Data File Objects** dialog box appears.

7. Ensure that **List Objects of Type** is Text files.
8. Select the text file named CALCDAT from the **Objects** list box.

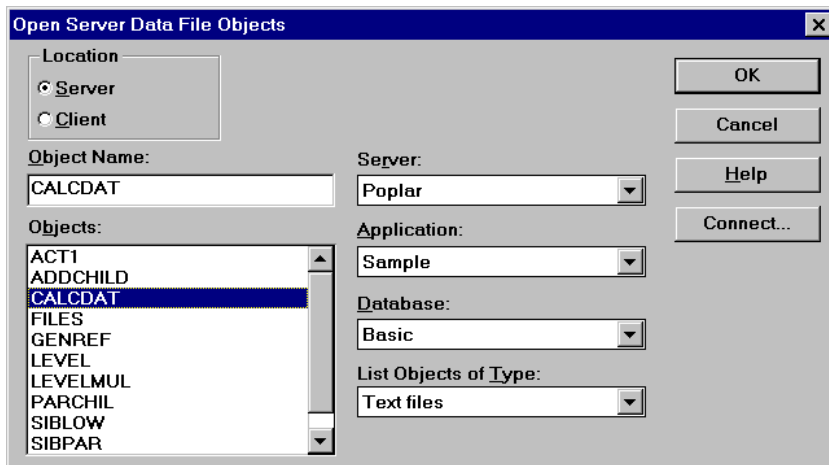


Figure 7-6, Selecting the CALCDAT Text File



- Click **OK** to close the dialog box. Essbase updates the **Data Load** dialog box to display the data file you chose.

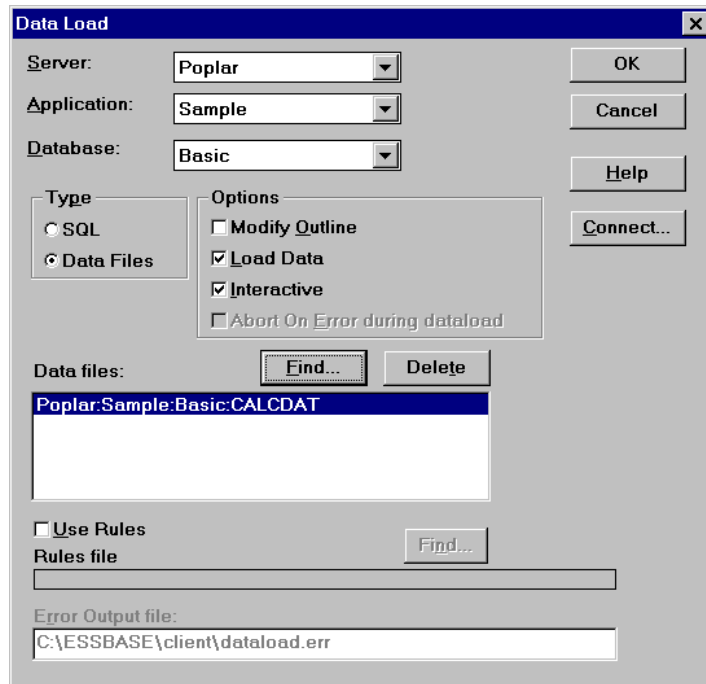


Figure 7-7, Data Load Dialog Box with CALCDAT Data File Selected

10. Click **OK** to load the selected file. The data file is a large fully calculated data set. It should take several minutes to load, and then the **Data Load Completed** dialog box appears. Click **Close**.

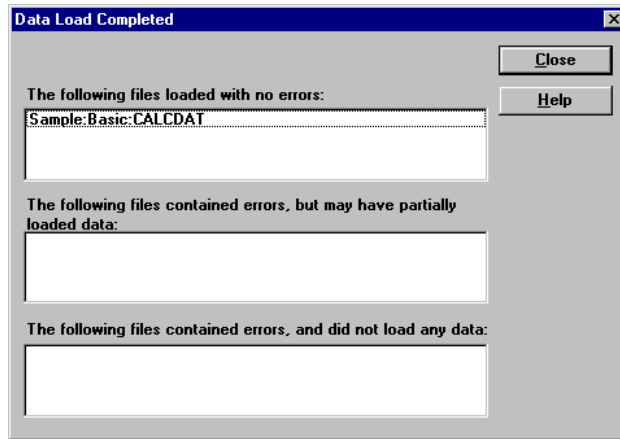


Figure 7-8, Message that Essbase Has Finished Loading CALCDAT Data File

---

## Preparing the Sample Interntl Database

The second database in the Sample application is called Interntl. To prepare it for use, you need to load data into it. Complete the following steps:

1. Open the Essbase Application Manager.
2. Connect to the server in which the Sample application is installed. This example uses the server Poplar. See Chapter 6, Application Manager Installation, if you're unsure how to do this.
3. Select the application called Sample from the **Applications** list box.
4. Select the database called Interntl from the **Databases** list box.
5. Choose Database | Load Data. The **Data Load** dialog box appears.

The **Data Load** dialog box is described in detail in the *Database Administrator's Guide*.

6. Click the **Find** button above the **Data files** list box to locate a data file to load. The **Open Server Data File Objects** dialog box appears.
7. Ensure that **List Objects of Type** is *Text files*.
8. Select the text file named CURRCALC from the **Objects** list box.
9. Click **OK** to close the dialog box. Essbase updates the **Data Load** dialog box to display the data file you chose.

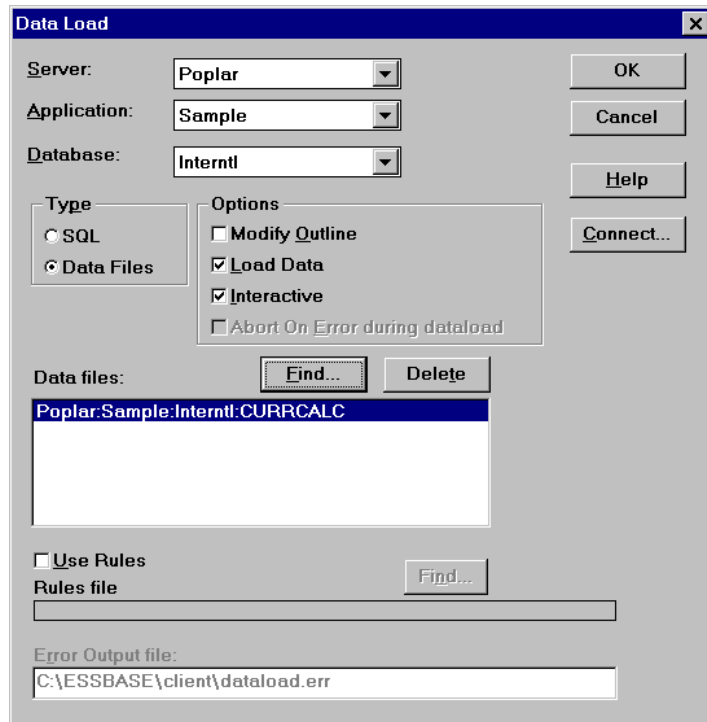


Figure 7-9, Data Load Dialog Box with CURRCALC Data File Selected

10. Click **OK** to load the selected file. The data file is a large fully calculated data set. It should take several minutes to load, and then the **Data Load Completed** dialog box appears. Click **Close**.

---

## Preparing the Sample Xchgrate Database

The third database in the Sample application is called Xchgrate. To prepare it for use, you need to load data into it. Complete the following steps:

1. Open the Application Manager.
2. Connect to the server in which the Sample application is installed. This example uses the server Poplar. See Chapter 6, *Application Manager Installation*, if you're unsure how to do this.
3. Select the application called `Sample` from the **Applications** list box.
4. Select the database called `xchgrate` from the **Databases** list box.
5. Choose Database | Load Data. The **Data Load** dialog box appears.

The **Data Load** dialog box is described in detail in the *Database Administrator's Guide*.

6. Click the **Find** button above the **Data files** list box to locate a data file to load. The **Open Server Data File Objects** dialog box appears.
7. Ensure that **List Objects of Type** is `Text files`.
8. Select the text file named `RATES` from the **Objects** list box.

- Click **OK** to close the dialog box. Essbase updates the **Data Load** dialog box to display the data file you chose.

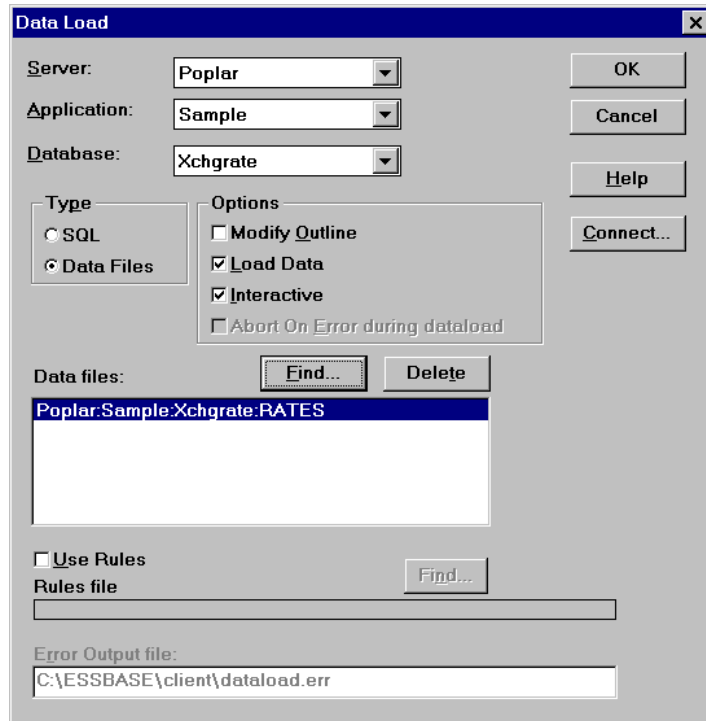


Figure 7-10, Data Load Dialog Box with RATES Data File Selected

- Click **OK** to load the selected file. The data file contains currency exchange rates, and should take less than one minute to load. The **Data Load Completed** dialog box appears. Click **Close**.

---

## Preparing the Demo Basic Database

**Note:** In some licensing instances, installation of the four sample applications may be restricted to the main application (Sample) and its three databases (Basic, Interntl, and Xchgrate). In this case, you will not see the Demo Basic database. Please refer to your license agreement for details.

The Demo application contains one database called Basic. To prepare it for use, you need to load data into it. Complete the following steps:

1. Open the Application Manager.
2. Connect to the server in which the Sample application is installed. This example uses the server Poplar. See Chapter 6, Application Manager Installation, if you're unsure how to do this.
3. Select the application called Demo from the **Applications** list box.
4. Select the database called `Basic` from the **Databases** list box.
5. Choose Database | Load Data. The **Data Load** dialog box appears.

The **Data Load** dialog box is described in detail in the *Database Administrator's Guide*.

6. Click the **Find** button above the **Data files** list box to locate a data file to load. The **Open Server Data File Objects** dialog box appears.
7. Ensure that **List Objects of Type** is `Text files`.
8. Select the text file named `DATA` from the **Objects** list box.

- Click **OK** to close the dialog box. Essbase updates the **Data Load** dialog box to display the data file you chose.

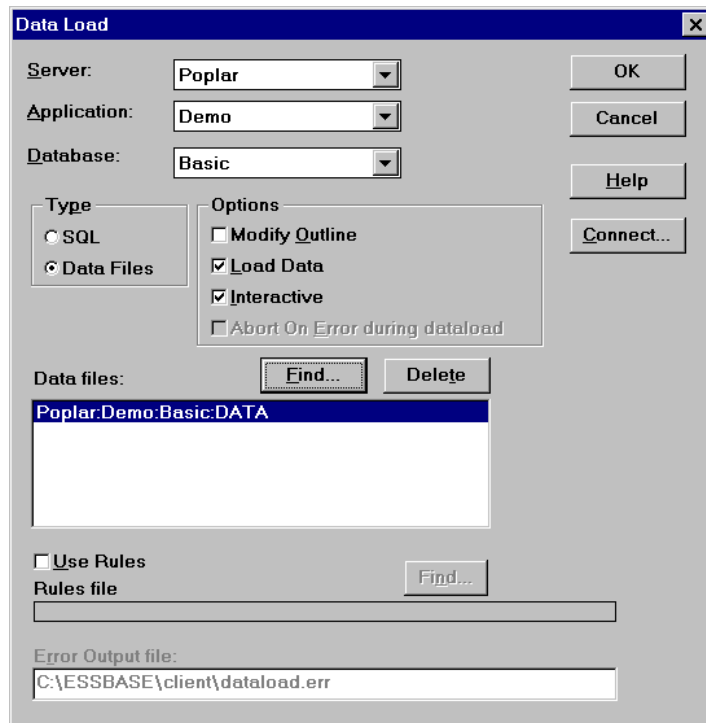


Figure 7-11, Data Load Dialog Box with DATA Data File Selected

- Click **OK** to load the selected file. The data file is approximately 660 KB. It should take a minute or two to load, and then the **Data Load Completed** dialog box appears. Click **Close**.

## Providing User Access to the Sample Applications

Essbase provides a comprehensive security system for a secure multi-user environment. By default, the sample applications are created with a security access level of None, which means that no user can connect to the database, unless the user is defined as a Supervisor.

The Essbase System Supervisor, defined when the Essbase server was installed, automatically has Supervisor privilege. Therefore, the Essbase System Supervisor can make the sample applications available to other users.

To provide all users with Write access to the database:

1. Log in using the Essbase System Supervisor account.
2. Open the Application Manager.
3. Connect to the server in which the Sample application is installed. See Chapter 6, Application Manager Installation, if you're unsure how to do this.
4. Select the application called `Sample` from the **Applications** list box.
5. Choose Application | Settings. The **Application Settings** dialog box appears:

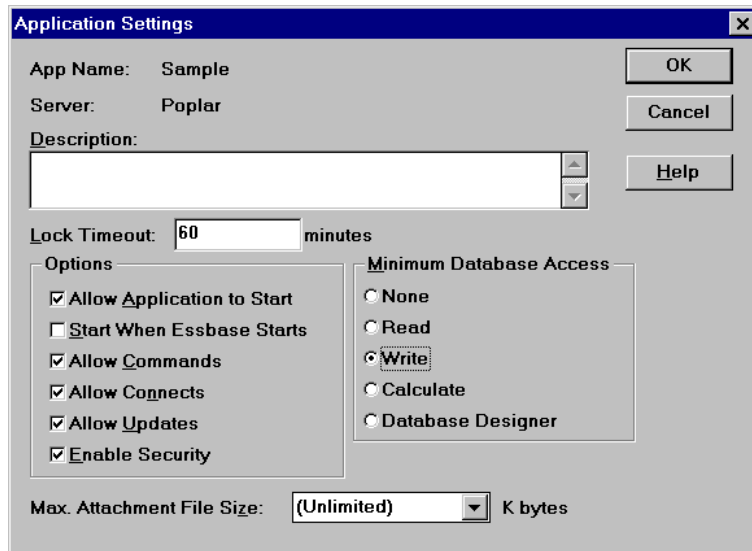


Figure 7-12. Choosing Write Access for the Sample Application



6. Click the **Write** option from the **Minimum Database Access** group, and click **OK** to save the setting.

Essbase closes the dialog box and returns you to the Application Desktop window.

7. Select the application called Demo from the Applications list box.
8. Choose Application | Settings. The **Application Settings** dialog box appears.
9. Click the **Write** option from the **Minimum Database Access** group, and click **OK** to save the setting.

Sample and Demo are now ready for use. If you want to use the Partitioning applications, continue on to “Setting the Environment for the Partitioning Sample Applications” on page 7-15. Otherwise, your next step might be to create the appropriate user names to be able to log in to Essbase. See the *Database Administrator’s Guide* for information on creating users.

---

## Setting the Environment for the Partitioning Sample Applications

**Note:** In some licensing instances, installation of the four sample applications may be restricted to the main application (Sample) and its three databases (Basic, Interntl, and Xchgrate). Please refer to your license agreement for details.

Essbase includes two sample applications and databases that show the features of Partitioning:

- Samppart, Company
- Sampeast, East

These applications and databases include partition definitions stored in .DDB files. The .DDB files define the map between member combinations in the target database, Company, and the source database, East. The *Database Administrator’s Guide* describes Partitioning, member combinations, and the differences between target and source databases.

For these applications to work in your environment, you need to match or change the information contained in the .DDB files. To use the applications, you must do the following:

- Create the user name that designed the applications.
- Change the server machine name that is embedded in the applications.

**Note:** Do not go into the .DDB files to change this information. Instead, complete the steps in the following sections. “Creating the Partition User” on page 7-16 describes how to create the required user name, so that your organization’s users can use these applications. “Changing the Server Name in the Sample Partition Definitions” on page 7-20 describes how to change the embedded server name to your server name.

## Creating the Partition User

Because the Samppart and Sampeast applications were designed by a user called *partitionuser*, you must create a user called *partitionuser* to work with these applications. Partitionuser must have Application Designer access to these applications on the server in which they are installed. If you are unsure how to do this, complete the following steps:

1. Open the Application Manager.
2. Using a user name that is a Supervisor or has Create/Delete Users, Group privilege, connect to the server in which the Samppart and Sampeast applications are installed.
3. Choose Security | Users/Groups. The **User/Group Security** dialog box appears.

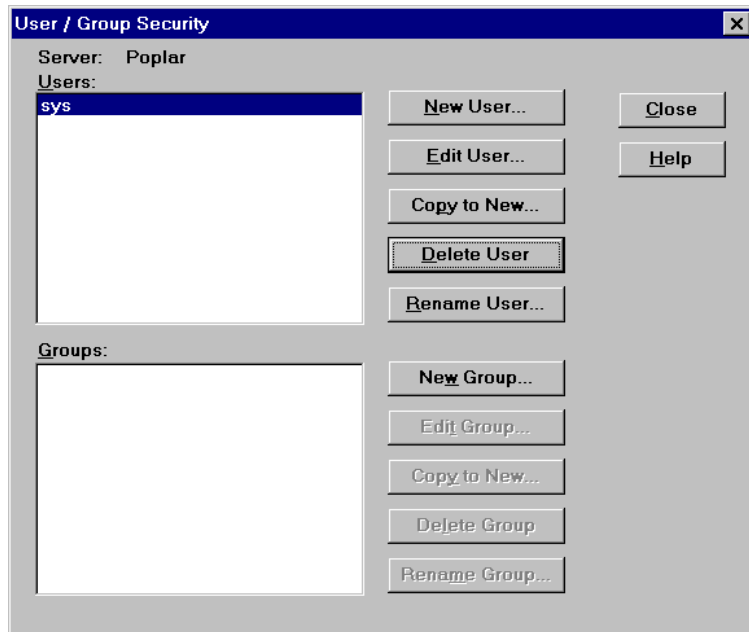


Figure 7-13. User/Group Security Dialog Box

4. Click the **New User** button. Essbase displays the **New User** dialog box.

The screenshot shows a 'New User' dialog box with the following elements:

- Server:** Poplar
- Username:** [Empty text box]
- Password:** [Empty text box]
- Confirm Password:** [Empty text box]
- Buttons:** OK, Cancel, Help
- Options:**
  - User Must Change Password at Next Login
  - Username Disabled
- User Type:**
  - Supervisor
  - User
  - Create/Delete Users, Groups
  - Create/Delete Apps
- Buttons:** Groups..., App Access...

Figure 7-14, New User Dialog Box

5. In the **Username** text box, enter `partitionuser`. Be sure to use all lowercase letters.
6. In the **Password** text box, enter a password. For example, type `password`. Essbase displays asterisks in the place of the characters you type.

7. In the **Confirm Password** text box, type your password again. Essbase displays asterisks in the place of the characters you type.

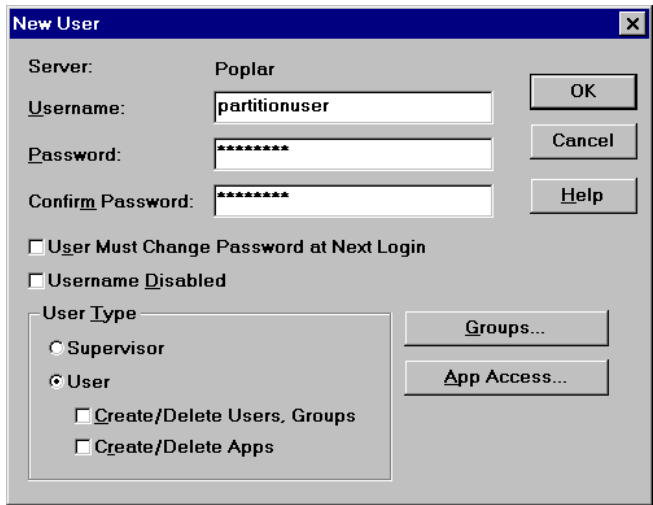


Figure 7-15, Entering New User Name and Password

8. Click the **App Access** button. Essbase displays the **User/Group Application Access** dialog box.

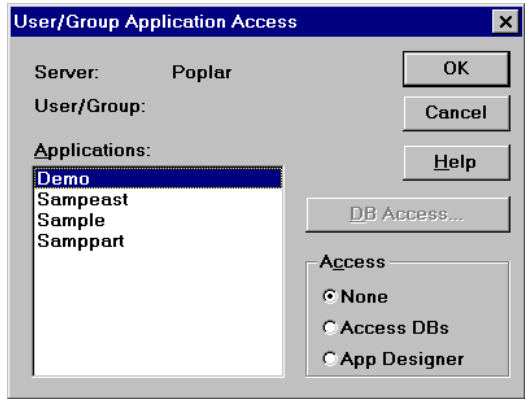


Figure 7-16, User/Group Application Access Dialog Box

9. Select the Sampeast application, then click **App Designer** in the **Access** group.
10. Select the Samppart application, then click **App Designer** in the **Access** group.

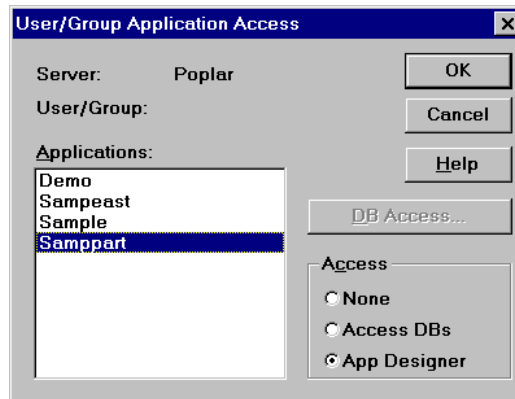


Figure 7-17. Selecting Samppart Application and App Designer Privilege

11. Click **OK** to return to the **New User** dialog box.
12. Click **OK** to return to the **User/Group Security** dialog box.
13. Click **Close**.

---

## Logging in as partitionuser

After creating the `partitionuser` user names, log out of the server and log in again as `partitionuser`. If you are unsure how to do this, complete the following steps:

1. If you are still logged in, choose **Server | Disconnect**. The **Logout** dialog box appears.
2. Click **OK** to log out.
3. Choose **Server | Connect**. Essbase displays the **Essbase System Login** dialog box.
4. In the **Username** text box, enter `partitionuser`.

- In the **Password** text box, enter the password.

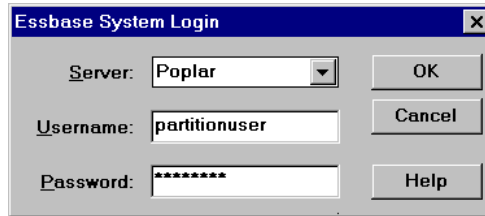


Figure 7-18, Logging In as Partitionuser

- Click **OK**. The Application Desktop window appears, and you are ready to continue setting up the Samppart and Sampeast applications.

---

## Changing the Server Name in the Sample Partition Definitions

The following steps change the embedded server name in the partition definition files (.DDB) to your server name. The .DDB files shipped with Samppart and Sampeast are based on the server name localhost.

The following steps change the server name in the Samppart Company .DDB file.

- In the Application Desktop window, select the Samppart application and Company database.

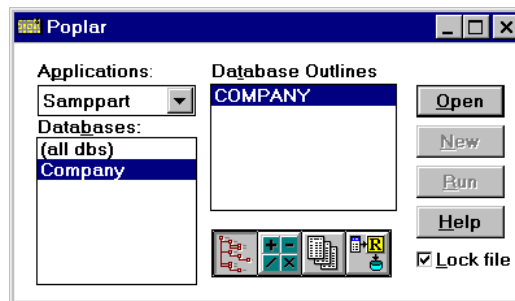


Figure 7-19, Selecting Samppart Application and Company Database

- Choose Database | Partition Manager. After a brief pause, Essbase displays the **Partition Manager** dialog box.

**Note:** If the Partition Manager dialog box doesn't appear or if it contains no definition entries, contact your Essbase System Administrator. Your Essbase server must be registered with a license number supporting Partitioning.

3. Select the first definition entry, labeled **Localhost: Sampeast: East** under the **Source Cube** heading.

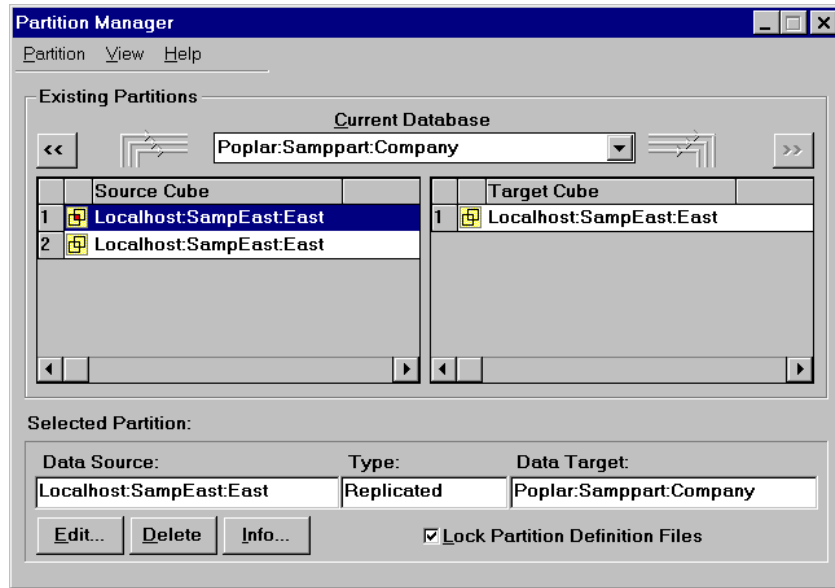


Figure 7-20, Selecting Localhost: Sampeast: East

4. Click the **Edit** button.

The **Dangling Remote Reference** dialog box appears. Because you are not connected to a server named Localhost, Essbase is warning you before it allows you to edit the definition.

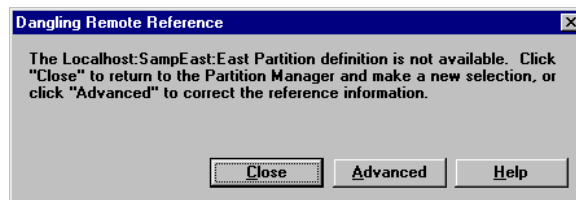


Figure 7-21, Dangling Remote Reference Dialog Box for Localhost: Sampeast: East

5. Click **Advanced**. The **Fix Dangling Partition Reference** dialog box appears.
6. Click **Correct the invalid partition reference** in the **Action** group.
7. In the **Server** text box in the **Reconnect** group, replace `localhost` with your server name, such as `Poplar`. See Figure 7-22.

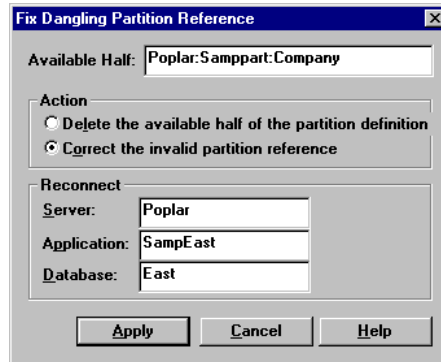


Figure 7-22, Replacing Server Name `localhost` with Server Name `Poplar`

8. Click **Apply**. Essbase displays the **Partition Manager** dialog box. See Figure 7-20.
9. Select the second definition entry, **localhost: Sampeast: East** in the **Source Cube** list.
10. Repeat steps 4–8 for this definition.
11. Select the first definition entry, **localhost: Sampeast: East** in the **Target Cube** list.
12. Repeat steps 4–8 for this definition.
13. Choose **Partition | Close** to return to the Application Desktop window.



Now you have changed the server name in the Samppart Company .DDB file.

Continue with the following steps to change the server name in the Sampeast East .DDB file.

1. In the Application Desktop window, select the Sampeast application and East database.

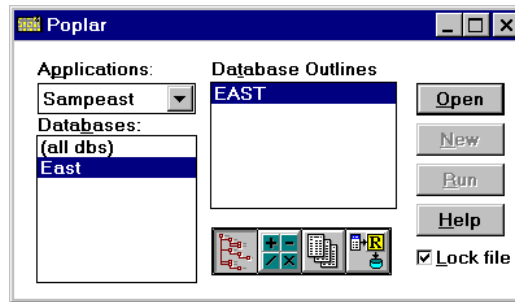


Figure 7-23, Selecting Sampeast Application and East Database

2. Choose Database | Partition Manager. After a brief pause, the **Partition Manager** dialog box appears.
3. Select the first definition entry, **Localhost: Samppart: Company** in the **Source Cube** list.

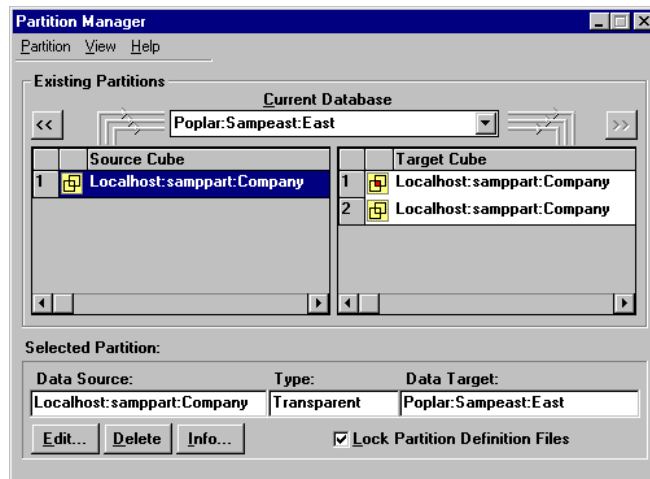


Figure 7-24, Selecting Localhost: Samppart: Company

4. Click **Edit**.

The **Dangling Remote Reference** dialog box appears. Because you are not connected to a server named Localhost, Essbase is warning you before it allows you to edit the definition.

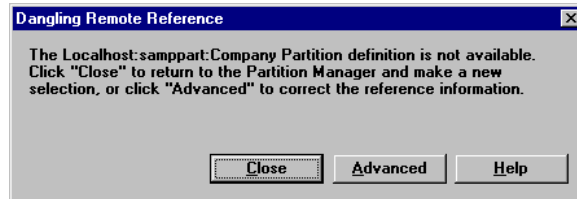


Figure 7-25, Dangling Remote Reference Dialog Box for Localhost: Samppart: Company

5. Click **Advanced**. The **Fix Dangling Partition Reference** dialog box appears.
6. Click **Correct the invalid partition reference** in the **Action** group.

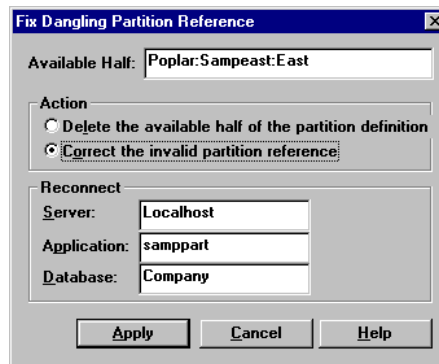


Figure 7-26, Replacing Server Name Localhost

7. In the **Server** text box in the **Reconnect** group, replace Localhost with your server name.
8. Click **Apply**. The **Partition Manager** dialog box appears.
9. Select the first definition entry, **Localhost: Samppart: Company** in the **Target Cube** list.

10. Repeat steps 4–8 for this definition.
  11. Select the second definition entry, **Localhost: Samppart: Company** in the **Target Cube** list.
  12. Repeat steps 4–8 for this definition.
  13. Choose Partition | Close to return to the Application Desktop window.
- Now you have changed the server name in the Sampeast East .DDB file.

---

## Preparing the Samppart Company Database

*Note:* In some licensing instances, installation of the four sample applications may be restricted to the main application (Sample) and its three databases (Basic, Interntl, and Xchgrate). In this case, you will not see the Samppart Company database. Please refer to your license agreement for details.

After setting up the environment for the Samppart and Sampeast databases, you need to load data into each database. This section shows you how to load Samppart Company. Complete the following steps:

1. Open the Application Manager.
2. Connect to the server in which Samppart is installed.

*Note:* You can log in as `partitionuser` or as a user with Supervisor privilege.

3. Select `Samppart` from the **Applications** list box.
4. Select `Company` from the **Databases** list box.
5. Choose Database | Load Data. The **Data Load** dialog box appears.
6. Click the **Find** button above the **Data files** list box to locate a data file to load. The **Open Server Data File Objects** dialog box appears.
7. Ensure that **List Objects of Type** is `Text files`.
8. Select the text file named `CALCCOMP` from the **Objects** list box.

9. Click **OK** to close the dialog box. Essbase updates the **Data Load** dialog box to display the data file you chose.

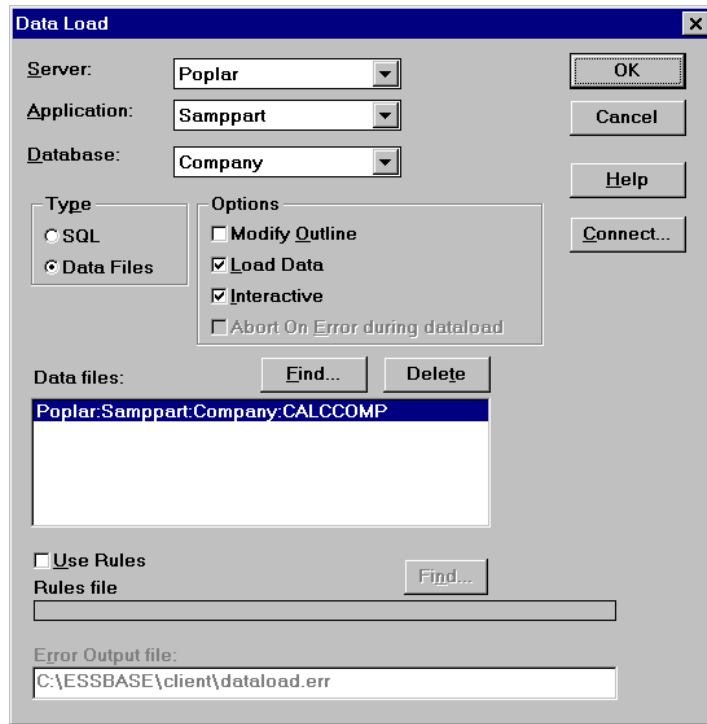


Figure 7-27, Data Load Dialog Box with CALCCOMP Data File Selected

10. Click **OK** to load the selected file. The data file is a large fully calculated data set. It should take about a minute to load, and then the **Data Load Completed** dialog box appears. Click **Close**.

---

## Preparing the Sampeast East Database

*Note:* In some licensing instances, installation of the four sample applications may be restricted to the main application (Sample) and its three databases (Basic, Interntl, and Xchgrate). In this case, you will not see the Sampeast East database. Please refer to your license agreement for details.

After setting up the environment for the Samppart and Sampeast databases, you need to load data into each database. This section shows you how to load Sampeast East. Complete the following steps:

1. Open the Application Manager.
2. Connect to the server in which Sampeast is installed.

*Note:* You can log in as `partitionuser` or as a user with Supervisor privilege.

3. Select Sampeast from the **Applications** list box.
4. Select East from the **Databases** list box.
5. Choose Database | Load Data. The **Data Load** dialog box appears.
6. Click the **Find** button above the **Data files** list box to locate a data file to load. The **Open Server Data File Objects** dialog box appears.
7. Ensure that **List Objects of Type** is `Text files`.
8. Select the text file named CALCEAST from the **Objects** list box.

9. Click **OK** to close the dialog box. Essbase updates the **Data Load** dialog box to display the data file you chose.

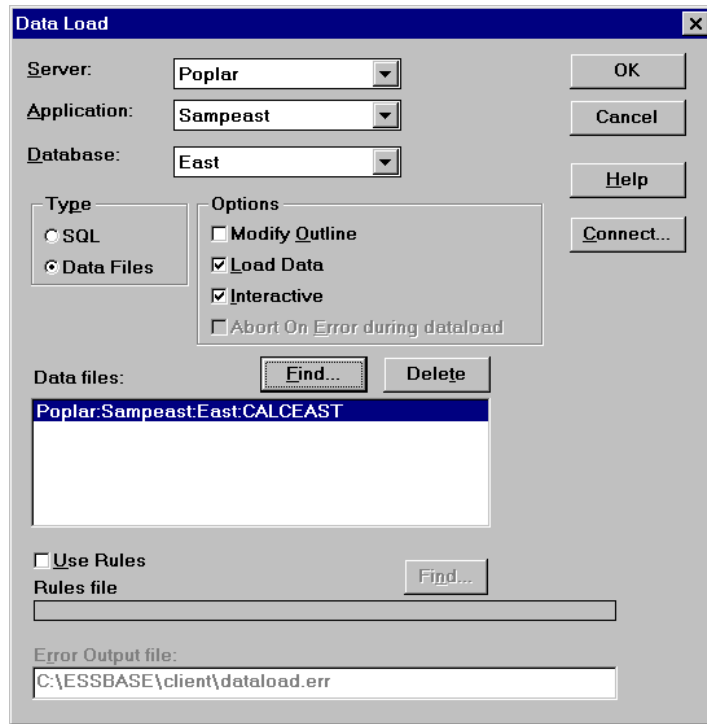


Figure 7-28. Data Load Dialog Box with CALCEAST Data File Selected

10. Click **OK** to load the selected file. The data file is a small fully calculated data set. It should take about a minute to load, and then the **Data Load Completed** dialog box appears. Click **Close**.

---

## Chapter 8

# Spreadsheet Add-in for Excel Installation

This chapter tells you, the client PC user, how to install the Hyperion Essbase Spreadsheet Add-in for Excel for Windows from a network drive, and connect to the Hyperion Essbase OLAP Server. It describes how to do the following:

- Install the Spreadsheet Add-in to the Windows 95, Windows 98, Windows NT 3.51, and Windows NT 4.0 client operating environments.
- Manually update your client environment settings if you don't want the installation program to change your environment.
- Start the Spreadsheet Add-in.

To install the Spreadsheet Add-in from the CD-ROM, see Chapter 2, CD-ROM Installation.

This chapter contains the following sections:

- "Before You Install" on page 8-2
- "Upgrading from Essbase 4.x" on page 8-3
- "About Installing the Spreadsheet Add-in from a Network Drive" on page 8-4
- "Installing the Spreadsheet Add-in on Your Client PC's Hard Drive" on page 8-7
- "Setting Up Your PC to Run the Spreadsheet Add-in on the Network Drive" on page 8-10
- "Changing the Network Protocol" on page 8-12
- "Manually Updating Your Environment Settings" on page 8-13
- "Starting the Spreadsheet Add-in" on page 8-19
- "Troubleshooting Steps" on page 8-20

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## Before You Install

Before you can install the Spreadsheet Add-in from a network drive, it must be installed to a network drive.

If you are an Essbase System Administrator, see Chapter 2, CD-ROM Installation, on installing the Spreadsheet Add-in to a network drive from the CD-ROM.

The Spreadsheet Add-in requires a Windows- or Windows NT-based PC with the following:

**Table 8-1, Spreadsheet Add-in Windows System Requirements**

<b>Component</b>	<b>Requirement</b>
Microprocessor	486 or higher
Windows Version	Windows 95 or 98, or Windows NT 3.51 or 4.0
Excel Version	95 or 97
RAM	8 MB
Disk Space	18 MB
Network Protocol	TCP/IP or Named Pipes

Also, you should know the following before installing the Spreadsheet Add-in from a network drive:

- Your client operating environment: Windows 95, Windows 98, or Windows NT 3.51 or 4.0
- The network protocol you use
- Where the Spreadsheet Add-in software resides on the network



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## Upgrading from Essbase 4.x

You can use the Version 4 Spreadsheet Add-in with a Version 5 (or later) server, but the features of Version 5 are not available in the Version 4 Spreadsheet Add-in.

Likewise, you can use the Version 5 or Version 5.0.1 Spreadsheet Add-in with the Version 5.0.2 server, but the features of Version 5.0.2 are not available in the earlier client.

You can also use the Version 4 Hyperion Essbase Application Manager with a Version 5 (or later) server, but the Version 4 Application Manager lacks the new features of Version 5. For example, you cannot save members tagged as Dynamic Calc with the Version 4 Application Manager. Running the Version 4 Application Manager with a Version 5 server is supported, but is not recommended. Running Version 4 of the Essbase server with any Version 5 client software does not work and is not supported.

**Warning:** Do *not* modify Version 5 outlines with the Version 4 Application Manager. If you save a Version 5 database outline that contains new Version 5 features, such as a Dynamic Calc tag, with the Version 4 Outline Editor, the new features are stripped from the outline.

When you install a Version 5 client, the default directory for installation is `C:\ESSBASE`, just as it was for Essbase 4.x. Using `C:\ESSBASE` is recommended.

Unless you choose to update them yourself, the client installation program updates your `$ARBORPATH` variable to point to the new Essbase directory, and your `PATH` to include the `BIN` directory beneath the new Essbase directory.

To successfully install Version 5 clients, do the following:

- Install all your clients in the same directory. This includes the Hyperion Essbase Application Manager, Spreadsheet Add-in, and SQL Drill-Through.
- If you install one Version 5 client, make all your clients on the same machine Version 5. This includes the Application Manager, Spreadsheet Add-in, and SQL Drill-Through.
- Version 5 clients share `.DLL` files that may not work with earlier clients.
- If you install Version 5 of SQL Drill-Through, and if you access the data source through the Essbase server and Hyperion Essbase SQL Interface, you must use Version 5 of SQL Interface.
- If you decide to run Version 4 of the Spreadsheet Add-in for Excel for Windows with the Version 5 server, make sure it points to `ESSEXCLN.XLL` (32-bit) in the correct directory. Remove the Add-in from Excel, and then add it again to point to the correct directory. See “Adding the Spreadsheet Add-in” on page 8-17.

- Move any client application files you have created to the new location. For example, if your old installation was C:\ESSBASE4, and your new installation is C:\ESSBASE5, copy the C:\ESSBASE4\CLIENT directory, and its subdirectories and files, to C:\ESSBASE5\CLIENT. Using MS-DOS, you can use the following command:

```
XCOPY C:\ESSBASE4\CLIENT\*. * C:\ESSBASE5\CLIENT\*. * /S
```

When you have successfully copied it, you can delete the old CLIENT directory.

---

## About Installing the Spreadsheet Add-in from a Network Drive

When installing from a network drive, the Spreadsheet Add-in installation program provides the following options:

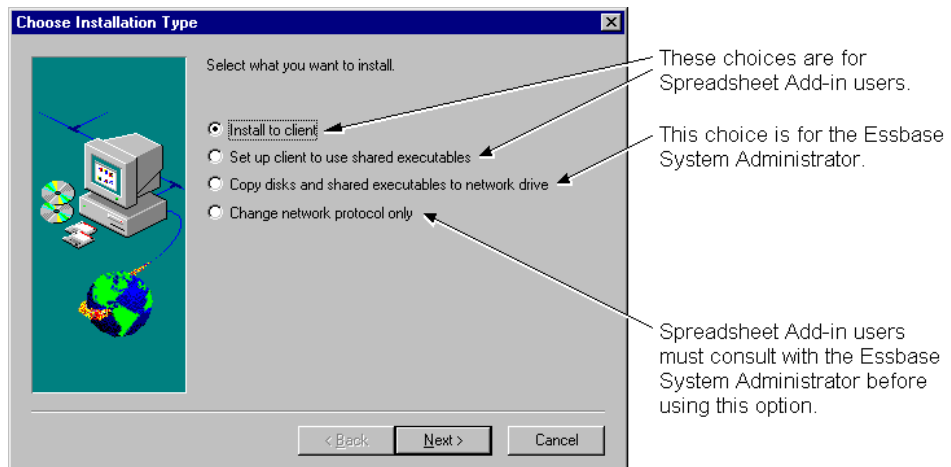


Figure 8-1, Four Spreadsheet Add-in Installation Options

The first two options, **Install to client** and **Set up client to use shared executables**, give you the following ways to install the Spreadsheet Add-in:

- **Install to client** installs the Spreadsheet Add-in software on your client PC's hard drive, so you can run it locally. See "Installing the Spreadsheet Add-in on Your Client PC's Hard Drive" on page 8-7 to learn about this option.

- **Set up client to use shared executables** sets up your client PC to run the Spreadsheet Add-in previously installed on a network drive by the Essbase System Administrator. You install only Windows or Windows NT system files on your client PC's hard drive. See "Setting Up Your PC to Run the Spreadsheet Add-in on the Network Drive" on page 8-10 to learn about this option.

The third option, **Copy files and shared executables to network drive**, lets the Essbase System Administrator install the Spreadsheet Add-in to a network drive, so you can either install and run it on your PC's hard drive, or run it on the network drive.

*Note:* If you are an Essbase System Administrator, see Chapter 2, CD-ROM Installation, on installing the Spreadsheet Add-in to a network drive. Spreadsheet Add-in users, do not select the third option unless authorized by the Essbase System Administrator.

The fourth option, **Change network protocol only**, lets you or the Essbase System Administrator install a different network protocol file for your Spreadsheet Add-in.

*Note:* Spreadsheet Add-in users, do *not* select this option if you set up your PC to run the Spreadsheet Add-in on the network drive. All users running—and sharing—a Spreadsheet Add-in on a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

---

## Network Protocol Files for Your Spreadsheet Add-in

The network protocol file implements the TCP/IP or Named Pipes protocol you selected on installing the Spreadsheet Add-in (or other client software) on your client PC's hard drive, or that the Essbase System Administrator selected on installing the same software to a network drive. The network protocol for 32-bit clients, such as Excel 95 or Excel 97, is `ESSNET.DLL`. The network protocol file resides in the `BIN` directory with the Spreadsheet Add-in software. This can be on your client PC's hard drive or on a network drive, depending on which installation option you chose.

For more information on network protocols, see Chapter 14, Network Configuration Notes.

---

## Directories and Files on the Network Drive

When the Essbase System Administrator installs the Spreadsheet Add-in to a network drive, the installation program, `SETUP . EXE`, installs the following files on the network drive:

- An installation directory for installing the Spreadsheet Add-in on your client PC's hard drive
- Program files for running the Spreadsheet Add-in on the network drive

The Essbase installation program (`SETUP . EXE`), and Windows and Windows NT system files to set up your PC to run the Spreadsheet Add-in on a network drive, are also installed.

If the Essbase System Administrator installs the Spreadsheet Add-in to the network drive `N`, and accepts the default directory `ESSBASE`, the installation program creates the following installation directory for the Spreadsheet Add-in:

```
N: \ESSBASE
    ESSEXC32
```

The installation program, `SETUP . EXE`, is in the `ESSEXC32` directory.

The installation program creates the following additional directories for the program files for the Spreadsheet Add-in:

```
    BIN
    CLIENT
        SAMPLE
    DOCS
        CLIENT
    LOCALE
```

The Spreadsheet Add-in program files are in the `BIN` directory. This includes the Add-in file you add to Excel to point Excel to the correct `BIN` directory. The Add-in file for 32-bit Excel 95 or Excel 97 is `ESSEXCLN . XLL`.

The Essbase sample spreadsheets reside in the `CLIENT \ SAMPLE` directory. If you create application and databases, and store them on your PC's hard drive, they reside in the `CLIENT` directory as follows:

```
    CLIENT
        APPNAME
        DBNAME
```

where `APPNAME` is the name of your application and `DBNAME` is the name of your database.

The *Spreadsheet Add-in User's Guide for Excel* is provided in the DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The .PDF file is named ESSEXCEL.PDF. Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from WWW.ADOBE.COM. On the Essbase CD-ROM, the Acrobat Reader executable file is located in the ADOBE directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

The LOCALE directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Installing the Spreadsheet Add-in on Your Client PC's Hard Drive

To install the Spreadsheet Add-in from the network to your client PC's hard drive, complete the following steps:

1. Run SETUP.EXE:

- **From Windows 95, Windows 98, or Windows NT 4.0:**
  - a. Click the **Start** button on your Windows desktop.
  - b. Choose **Settings**, and then choose **Control Panel**.
  - c. In the Control Panel, double-click **Add/Remove Programs**.
  - d. Click **Install**, and then click **Next**.
  - e. When prompted for the command line, specify the following:

`N: \ESSBASE\ESSEXC32\SETUP.EXE`

where *N: \ESSBASE* is the name of the network drive and directory where your Essbase System Administrator installed the Spreadsheet Add-in.

The installation program detects if you have the correct version of Excel for the Spreadsheet Add-in you are installing.

- **From the Program Manager in Windows NT 3.51**, choose **File | Run**. Then type the following:

`N: \ESSBASE\ESSEXC32\SETUP.EXE`

where *N: \ESSBASE* is the name of the network drive and directory where your Essbase System Administrator installed the Spreadsheet Add-in.

2. Follow the directions on your screen.
3. When prompted to **Choose Installation Type**, choose **Install to client**.

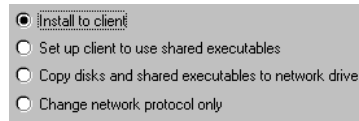


Figure 8-2, Choosing to Install the Spreadsheet Add-in on Your Client PC's Hard Drive

4. When prompted to **Choose Network Protocol**, choose a network protocol. See your Essbase System Administrator if you're not sure which option to choose.

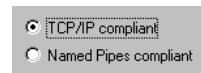


Figure 8-3, Choosing the TCP/IP Network Protocol for the Spreadsheet Add-in

5. When prompted for **Installation location**, specify the directory where you want to install the Spreadsheet Add-in.

The default is C:\ESSBASE. Click **Browse** to specify a different location.

**Note:** Install all client software in the same directory. See "Upgrading from Essbase 4.x" on page 8-3 for more information.

6. When prompted for **Confirmation** of what to install and where to install it, click **No** if you want to change your selection. Click **Yes** to accept it.
7. When prompted whether to **Update Environment?**, click **Yes**.

If you don't want the installation program to update your environment, you can update it yourself. See "Manually Updating Your Environment Settings" on page 8-13.

**Note:** If your PATH statement appears on multiple lines in the AUTOEXEC.BAT file, Essbase adds \ESSBASE\BIN to the last line. If you have a previous installation of Essbase in another directory that appears on an earlier line of the PATH statement, you must remove it.

8. If your PC was not previously configured with the correct PATH statement, reboot your PC.

This lets the changes to your environment take effect. You might not need to reboot if you previously installed client software to the same directory where you are installing the Spreadsheet Add-in.

---

## Directories Created When You Install the Spreadsheet Add-in on Your Client PC's Hard Drive

When you install the Spreadsheet Add-in on your client PC's hard drive, the installation program, `SETUP.EXE`, creates the following directories on your client PC's hard drive:

```

ESSBASE
  BIN
  CLIENT
    SAMPLE
  DOCS
    CLIENT
  LOCALE

```

The Spreadsheet Add-in program files are in the `BIN` directory. This includes the Add-in file you add to Excel to point Excel to the correct `BIN` directory. The Add-in file for 32-bit Excel 95 or Excel 97 is `ESSEXCLN.XLL`.

The Essbase sample spreadsheets reside in the `CLIENT\SAMPLE` directory.

If you create applications and databases, and store them on your PC's hard drive, they reside in the `CLIENT` directory as follows:

```

CLIENT
  APPNAME
  DBNAME

```

where `APPNAME` is the name of your application and `DBNAME` is the name of your database.

The *Spreadsheet Add-in User's Guide for Excel* is provided in the `DOCS\CLIENT` directory in `.PDF` format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The `.PDF` file is named `ESSEXCEL.PDF`. Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from `WWW.ADOBE.COM`. On the Essbase CD-ROM, the Acrobat Reader executable file is located in the `ADOBE` directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

The `LOCALE` directories contain the character-set files necessary for all the languages Essbase supports, including English.

## Setting Up Your PC to Run the Spreadsheet Add-in on the Network Drive

To set up your PC to run the Spreadsheet Add-in on the network drive, complete the following steps:

1. Run `SETUP . EXE`:
    - **From Windows 95, Windows 98, or Windows NT 4.0:**
      - a. Click the **Start** button on your Windows desktop.
      - b. Choose Settings, and then choose Control Panel.
      - c. In the Control Panel, double-click **Add/Remove Programs**.
      - d. Click **Install**, and then click **Next**.
      - e. When prompted for the command line, specify the following:  
`N: \ESSBASE\ESSEXC32\SETUP . EXE`  
 where `N: \ESSBASE` is the name of the network drive and directory where your Essbase System Administrator installed the Spreadsheet Add-in.
    - **From the Program Manager in Windows NT 3.51,** choose File | Run, then type the following:  
`N: \ESSBASE\ESSEXC32\SETUP . EXE`  
 where `N: \ESSBASE` is the name of the network drive and directory where your Essbase System Administrator installed the Spreadsheet Add-in.
- Note:* The installation program detects if you have the correct version of Excel for the Spreadsheet Add-in you are installing.
2. Follow the directions on your screen.
  3. When prompted to **Choose Installation Type**, choose **Set up client to use shared executables**.

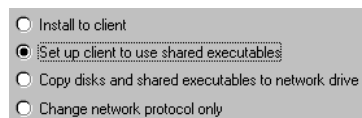


Figure 8-4, Choosing to Set Up Your PC to Run the Spreadsheet Add-in on the Network Drive



4. The program detects where the network installation of the Spreadsheet Add-in resides. If it cannot find it, you are prompted for the directory. Click **Browse** to specify the location.

*Note:* The Essbase shared executable files are in the BIN directory.

5. When prompted for **Confirmation** of what to install and where to install it, click **No** if you want to change your selection. Click **Yes** to accept it.
6. When prompted whether to **Update Environment?**, click **Yes**.

If you don't want the installation program to update your environment, you can update it yourself. See "Manually Updating Your Environment Settings" on page 8-13.

*Note:* If your PATH statement appears on multiple lines in the AUTOEXEC.BAT file, Essbase adds \ESSBASE\BIN to the last line. If you have a previous installation of Essbase in another directory that appears on an earlier line of the PATH statement, you must remove it.

7. If your PC was not previously configured with the correct PATH statement, reboot your PC. This lets the changes to your environment take effect. You might not need to reboot if you previously installed client software to the same directory where you are installing the Spreadsheet Add-in.

---

## Directories Used When You Set Up Your PC's Operating Environment to Run the Spreadsheet Add-in on the Network Drive

When you set up your PC to run the Spreadsheet Add-in on the network drive, the installation program, SETUP.EXE, does not create any directories on your client PC's hard drive. It installs only Windows or Windows NT system files on your client PC's hard drive. You run the program files that are on the network drive. They are in the following directories:

```
ESSBASE
    BIN
    CLIENT
        SAMPLE
    DOCS
        CLIENT
    LOCALE
```

The Spreadsheet Add-in program files are in the BIN directory. This includes the Add-in file you add to Excel to point Excel to the correct BIN directory. The Add-in file for 32-bit Excel 95 or Excel 97 is ESSEXCLN.XLL.

The Essbase sample spreadsheets reside in the `CLIENT\SAMPLE` directory.

If you create applications and databases, and store them on the network drive, they reside in the `CLIENT` directory as follows:

```
CLIENT
    APPNAME
    DBNAME
```

where *APPNAME* is the name of your application and *DBNAME* is the name of your database.

The *Spreadsheet Add-in User's Guide for Excel* is provided in the `DOCS\CLIENT` directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The .PDF file is named `ESSEXCEL.PDF`. Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from `WWW.ADOBE.COM`. On the Essbase CD-ROM, the Acrobat Reader executable file is located in the `ADOBE` directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Changing the Network Protocol

As a client PC user, changing the network protocol is something you rarely do. If you installed the Spreadsheet Add-in on your client PC's hard drive, speak to your Essbase System Administrator before changing your network protocol.

If you set up your client PC to run the Spreadsheet Add-in on the network drive, do not change the network protocol. All users running—and sharing—a Spreadsheet Add-in on a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

To install a different network protocol file for your Spreadsheet Add-in, complete the following steps:

1. Follow steps 1 and 2 of "Installing the Spreadsheet Add-in on Your Client PC's Hard Drive" on page 8-7.

- When prompted to **Choose Installation Type**, choose **Change network protocol only**.

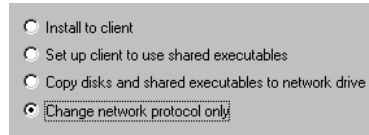


Figure 8-5. Choosing to Change the Network Protocol

- When prompted to **Choose Network Protocol**, choose a network protocol. See your Essbase System Administrator if you're not sure which option to choose.

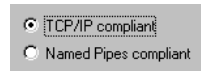


Figure 8-6. Choosing the TCP/IP Network Protocol for the Spreadsheet Add-in

- When prompted for **Installation location**, specify the directory where you installed the Spreadsheet Add-in on your client PC's hard drive.
- When prompted for **Confirmation**, click **No** if you want to change your selection. Click **Yes** to accept it.

---

## Manually Updating Your Environment Settings

The installation program updates your client PC's operating environment or lets you update it. Updating your environment sets your PC to run the Spreadsheet Add-in software. It does the following:

- Adds ARBORPATH to your Windows AUTOEXEC .BAT file or your Windows NT registry
- Adds a README .TXT file and an Excel Add-in help file to your Windows or Windows NT Hyperion Essbase 5.0.x program group
- Adds Essbase to the Excel menu bar and points Excel to the BIN directory where Essbase is installed

If you don't want the installation program to update your PC's environment, you need to set the environment manually. Proceed with the following section that is appropriate for your operating system.

**Note:** If you use the Spreadsheet Add-in for Excel and the Hyperion Essbase API, make sure that `C:\ESSBASE\BIN` precedes `C:\ESSBASE\API\LIB` and `C:\ESSBASE\API\INCLUDE` in your `PATH` statement. If `C:\ESSBASE\BIN` comes after `C:\ESSBASE\API\LIB` or `C:\ESSBASE\API\INCLUDE` in your `PATH` statement, Excel will not add the Spreadsheet Add-in automatically. You will have to add the Add-in to Excel yourself, using Tools | Add-Ins on the Excel menu bar.

---

## Setting Your Environment on Windows 95 and Windows 98

To update your environment settings on Windows 95 and Windows 98, complete the following steps:

1. Add the following environment variable to your `AUTOEXEC.BAT` file:

```
ARBORPATH=C:\ESSBASE
```

where `C:\ESSBASE` is the directory where you installed the Spreadsheet Add-in on your client PC's hard drive, or is the directory where the Essbase System Administrator installed the Spreadsheet Add-in on a network drive.

Do not put a space before or after the equals sign (=) in the `$ARBORPATH` environment setting.

2. Add `C:\ESSBASE\BIN` to your `PATH` statement.

where `C:\ESSBASE` is the directory where the Spreadsheet Add-in is installed either on your PC's hard drive or on a network drive.

3. Remove references to installations of Essbase in other directories.

**Tip:** You can type `SET` from an MS-DOS command prompt to view your current environment settings.

4. Reboot your PC.
5. Proceed with "Adding the Spreadsheet Add-in" on page 8-17.

---

## Setting Your Environment on Windows NT 3.51

To update your environment settings on Windows NT 3.51:

1. Start the Control Panel from the Windows desktop.
2. Double-click the System icon. The **System** dialog box appears.
3. Look for an existing ARBORPATH setting in the **System Environment Variables** list box.

If the setting is there, select it, then do the following:

- a. Change the information in the **Value** text box to `C:\ESSBASE`.

This assumes that `C:\ESSBASE` is the directory where you installed the Spreadsheet Add-in on your client PC's hard drive, or is the directory where the Essbase System Administrator installed the Spreadsheet Add-in on a network drive

- b. Click **Set**.

If the setting is not there, do the following:

- a. Type ARBORPATH in the **Variable** text box. Do NOT type an equals sign (=).

- b. Type `C:\ESSBASE` in the **Value** text box.

This assumes that `C:\ESSBASE` is the directory where the Spreadsheet Add-in is installed either on your PC's hard drive or on a network drive.

- c. Click **Set**.

**Note:** You are changing *system* settings, which affect all users who access your machine.

4. Look for an existing PATH setting in the **System Environment Variables** list box. Select it, then do the following:

- a. Remove any outdated ARBOR or ESSBASE directories from the list in the **Value** text box.

- b. Add the following to the list of directories in the PATH in the **Value** text box:

`C:\ESSBASE\BIN`

where `C:\ESSBASE` is the directory where the Spreadsheet Add-in is installed either on your PC's hard drive or on a network drive. Use a semi-colon if necessary to separate directory names.

- c. Click **Set**.

**Note:** Windows NT creates a PATH setting when the operating system is installed.

5. Click **OK** to close the **System** dialog box.
6. Close the Control Panel.
7. Log out and log in again, or reboot your PC.
8. Proceed with “Adding the Spreadsheet Add-in” on page 8-17.

---

## Setting Your Environment on Windows NT 4.0

To update your environment settings on Windows NT 4.0:

1. Click the **Start** button on your Windows desktop.
2. Choose Settings | Control Panel.
3. Double-click the System icon. The **System Properties** dialog box appears.
4. Click the **Environment** tab.
5. Look for an existing ARBORPATH setting in the **System Variables** list box.

If the setting is there, select it, then do the following:

- a. Change the information in the **Value** text box to `C:\ESSBASE`  
 where `C:\ESSBASE` is the directory where you installed the Spreadsheet Add-in on your client PC’s hard drive, or is the directory where the Essbase System Administrator installed the Spreadsheet Add-in on a network drive.
- b. Click **Set**.

If the setting is not there, do the following:

- a. Type ARBORPATH in the **Variable** text box. Do NOT type an equals sign (=).
- b. Type `C:\ESSBASE` in the **Value** text box.  
 This assumes that `C:\ESSBASE` is the directory where the Spreadsheet Add-in is installed either on your PC’s hard drive or on a network drive.
- c. Click **Set**.

**Note:** You are changing *system* settings, which affect all users who access your machine.

6. Look for other, outdated ARBOR or ESSBASE settings in the **System Variables** list box. If one is there, select it, then do the following to remove it:
  - a. Click **Delete**.
  - b. Click **Set**.

7. Click **OK** to close the **System Properties** dialog box.
8. Close the Control Panel.
9. Log out and log in again, or reboot your PC.
10. Proceed with “Adding the Spreadsheet Add-in” on page 8-17.

---

## Adding the Spreadsheet Add-in

After you manually update your environment settings, you must use the Excel Add-In facility to add the Spreadsheet Add-in to Excel. This causes Essbase to appear on the Excel menu bar, and points Excel to the Spreadsheet Add-in file in the BIN directory. The Spreadsheet Add-in file is on your PC’s hard drive if you chose to install the Spreadsheet Add-in there, or on the network drive if you chose to set up your PC to run the Spreadsheet Add-in there.

**Note:** ESSEXCLN.XLL is the Add-in file for 32-bit Excel 95 and Excel 97. Adding the Spreadsheet Add-in to Excel 95 and Excel 97 modifies the Windows 95 or Windows NT Registry. The .INI file and Registry simply point to where the Spreadsheet Add-in file is installed.

To add the Spreadsheet Add-in to Excel:

1. In Excel, choose Tools | Add-Ins.  
The **Add-Ins** dialog box appears.
2. Click **Browse**.  
A file selection dialog box appears.
3. To complete this step, you must know whether you are running the Spreadsheet Add-in from your PC’s hard drive or from a network drive.  
Choose the file ESSEXCLN.XLL in the BIN directory where you installed the Spreadsheet Add-in on your PC’s hard drive, or where your Essbase System Administrator installed the Spreadsheet Add-in on a network drive.
4. Click **OK** twice to close the dialog boxes and start the Spreadsheet Add-in. The Essbase startup screen appears.

If the startup screen does not appear, or Excel does not list Essbase as an Add-in on the menu bar, see “Troubleshooting Steps” on page 8-20 to correct the problem.

## Installing the Essbase Toolbar

The Spreadsheet Add-in provides a convenient toolbar that displays buttons for accessing most of the common Essbase commands without having to open the Essbase menu. To use the Essbase toolbar, you must first install it by opening an Excel file that is provided as part of the default Essbase installation. For more information on using the toolbar, see "Using the Essbase Toolbar" in Chapter 2 of the *Spreadsheet Add-in User's Guide for Excel*.

To install the Essbase toolbar:

1. Start Excel.
2. Choose File | Open.
3. Open the ESSTOOLB.XLS file from the \ESSBASE\CLIENT\SAMPLE directory.

Depending on how software is installed on your PC, this file may not be available or may be located in a different directory. Contact your Essbase System Administrator for more information.

A blank spreadsheet appears.

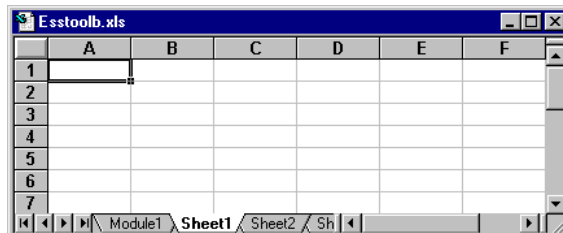


Figure 8-7, ESSTOOLB.XLS File

**Note:** If you are using Excel 97, two dialog boxes may appear in sequence when you open the ESSTOOLB.XLS file. If so, click the **Enable Macros** button on the first dialog box, and click **OK** on the second.

4. Choose File | Close to close the ESSTOOLB.XLS file. You don't need to modify or save the file.



You should not have to perform the toolbar installation procedure again unless you delete the Essbase toolbar from the **Toolbars** dialog box in Excel. If you delete the toolbar, perform the installation procedure again.

**Note:** If you have toolbars turned off in Excel, you won't see the Essbase toolbar immediately. You must enable toolbars first. For more information, see "Using the Essbase Toolbar" in Chapter 2 of the *Spreadsheet Add-in User's Guide for Excel*.

---

## Starting the Spreadsheet Add-in

After installing the Spreadsheet Add-in on your PC's hard drive, or setting up your PC to run the Spreadsheet Add-in on the network drive, do the following:

1. Reboot Windows to let the changes to your environment take effect.
2. Run Excel. The Essbase startup screen appears.

If the startup screen does not appear, see "Troubleshooting Steps" on page 8-20 to correct the problem.

3. Choose Essbase | Connect to connect to the Essbase server.

The **Essbase System Login** dialog box appears.

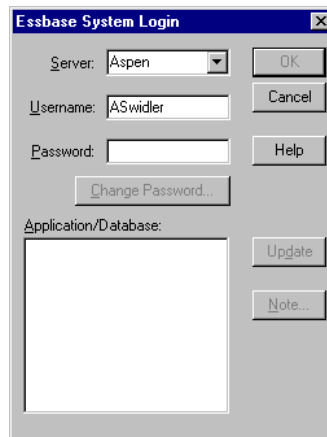


Figure 8-8, Entering the Server Name in the Essbase System Login Dialog Box

4. Enter your server name, user name, and password, and then click **OK**.

An alternate way to enter the server name, if you use TCP/IP, is to enter its IP address. See Chapter 6, *Application Manager Installation*, “Connecting to the Server” on page 6-18, for details about using an IP address in place of a server name. See your network administrator for your server’s IP address.

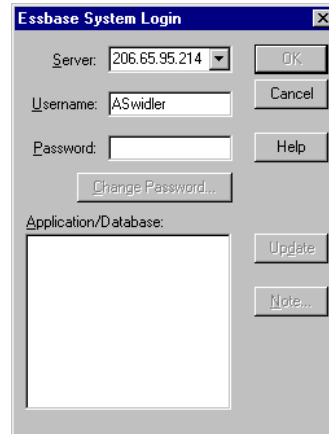


Figure 8-9. Entering the IP Address in the Essbase System Login Dialog Box

5. After you connect to the server, select the application and database to connect to, and then click **OK**.

See the *Spreadsheet Add-in User's Guide for Excel* for more information about connecting to Essbase servers and databases.

---

## Troubleshooting Steps

If the Spreadsheet Add-in is not properly installed or configured, use the following steps to isolate the problem.

- Reboot your computer.
- Check your environment.
- Remove and add the Spreadsheet Add-in.
- Install the Spreadsheet Add-in again.

---

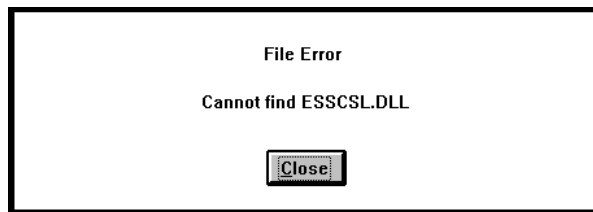
## Reboot Your Computer

On Windows 95 and Windows 98, reboot your computer. On Windows NT 3.51 and 4.0, log out and log in again, or reboot your computer. This ensures that changes to your environment settings take effect.

---

## Check Your Environment

If the following message appears, you may have a problem with your `PATH` or the `ARBORPATH` environment variable.



*Figure 8-10, Environment Error Message*

Type `PATH` at the MS-DOS command prompt. Make sure that `\ESSBASE\BIN`, or the `BIN` directory of the directory you specified during setup, appears in the `PATH` statement.

Type `SET` and check your `ARBORPATH` setting. It should indicate the drive and directory you specified during setup; for example,

```
ARBORPATH=C:\ESSBASE
```

---

## Remove and Add the Spreadsheet Add-in

If the problem persists, remove the Spreadsheet Add-in from Excel, exit Excel, restart Excel, and add the Add-in again.

---

## Install the Spreadsheet Add-in Again

Run the installation program again. Accept the default settings. Be sure to specify the correct network protocol.

---

## Chapter 9

# Spreadsheet Add-in for 1-2-3 Installation

This chapter tells you, the client PC user, how to install the Hyperion Essbase Spreadsheet Add-in for 1-2-3 from a network drive, and connect to the Hyperion Essbase OLAP Server. It describes how to do the following:

- Install the Spreadsheet Add-in to the Windows 95, Windows 98, and Windows NT 4.0 client operating environments.

**Note:** 32-bit Lotus 1-2-3 is not supported on Windows NT 3.51.

- Manually update your client environment settings if you don't want the installation program to change your environment.
- Start the Spreadsheet Add-in.

To install the Spreadsheet Add-in from CD-ROM, see Chapter 2, CD-ROM Installation. Refer to the *Start Here* booklet for disk space and memory requirements.

This chapter contains the following sections:

- "Before You Install" on page 9-2
- "Upgrading from Essbase 4.x" on page 9-3
- "About Installing the Spreadsheet Add-in from a Network Drive" on page 9-4
- "Installing the Spreadsheet Add-in on Your Client PC's Hard Drive" on page 9-7
- "Setting Up Your PC to Run the Spreadsheet Add-in on the Network Drive" on page 9-10
- "Changing the Network Protocol" on page 9-12
- "Manually Updating Your Environment Settings" on page 9-13
- "Starting the Spreadsheet Add-in" on page 9-16
- "Troubleshooting Steps" on page 9-18

---

## Before You Install

Before you can install the Spreadsheet Add-in from a network drive, it must be installed to a network drive.

If you are an Essbase System Administrator, see Chapter 2, CD-ROM Installation, on installing the Spreadsheet Add-in to a network drive from the CD-ROM.

The Spreadsheet Add-in requires a Windows- or Windows NT-based PC with the following requirements:

**Table 9-1, Spreadsheet Add-in for 1-2-3 Windows System Requirements**

<b>Component</b>	<b>Requirement</b>
Microprocessor	486 or higher
Windows Version	Windows 95, Windows 98, or Windows NT 4.0
1-2-3 Version	97 or Release 9
RAM	8 MB
Disk Space	18 MB
Network Protocol	TCP/IP or Named Pipes

Also, you should know the following before installing the Spreadsheet Add-in from a network drive:

- Your client operating environment: Windows 95, Windows 98, or Windows NT 4.0
- The network protocol you use
- Where the Spreadsheet Add-in software resides on the network

## Upgrading from Essbase 4.x

You can use the Version 4 Spreadsheet Add-in with a Version 5 server, but the features of Version 5 are not available in the Version 4 Spreadsheet Add-in.

Likewise, you can use the Version 5 or Version 5.0.1 Spreadsheet Add-in with the Version 5.0.2 server, but the features of Version 5.0.2 are not available in the earlier client.

When using the Version 5.0.1 Spreadsheet Add-in, you must use the Version 5.0.1 or later Hyperion Essbase OLAP Server.

When you install a Version 5.x client, the default directory for installation is `C:\ESSBASE`, just as it was for Essbase 4.x. Using `C:\ESSBASE` is recommended.

Unless you choose to update them yourself, the client installation program updates your `$ARBORPATH` variable to point to the new Essbase directory, and your `PATH` to include the `BIN` directory beneath the new Essbase directory.

To successfully install Version 5.x clients, do the following:

- Install all your clients in the same directory. This includes the Hyperion Essbase Application Manager, Spreadsheet Add-in, and Hyperion Essbase SQL Drill-Through.
- If you install one version of a client, make all your clients the same version. This includes the Application Manager, Spreadsheet Add-in, and SQL Drill-Through.

**Note:**

Version 5 and later clients share `.DLL` files that may not work with earlier clients.

- Use equal versions of SQL Drill-Through and SQL Interface. For example, if you install Version 5.0.2 of SQL Drill-Through, and you access the data source through the Essbase server and Hyperion Essbase SQL Interface, you must use Version 5.0.2 of SQL Interface.
- Move any client application files you have created to the new location. For example, if your old installation was `C:\ESSBASE4`, and your new installation is `C:\ESSBASE5`, copy the `C:\ESSBASE4\CLIENT` directory, and its subdirectories and files, to `C:\ESSBASE5\CLIENT`. Using MS-DOS, you can use the following command:

```
XCOPY C:\ESSBASE4\CLIENT\*.* C:\ESSBASE5\CLIENT\*.* /S
```

When you have successfully copied it, you can delete the old `CLIENT` directory.

## About Installing the Spreadsheet Add-in from a Network Drive

When installing from a network drive, the Spreadsheet Add-in installation program provides the following options:

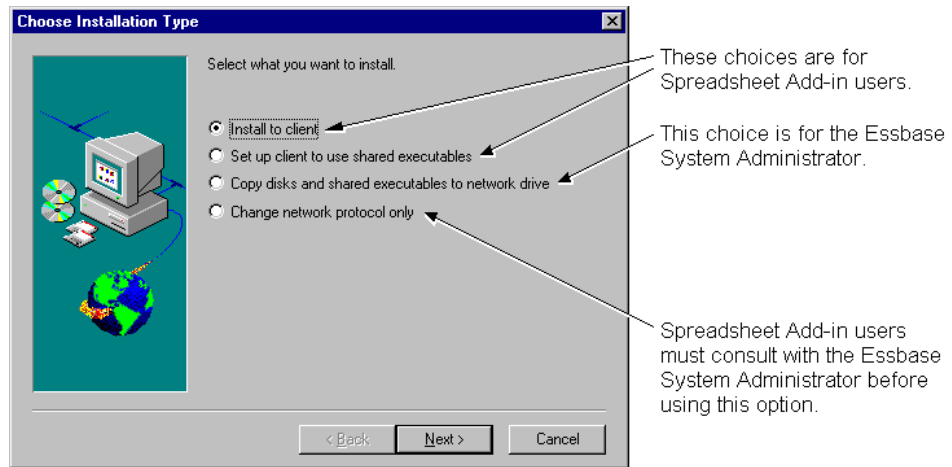


Figure 9-1, Four Spreadsheet Add-in Installation Options

The first two options, **Install to client** and **Set up client to use shared executables**, give you the following ways to install the Spreadsheet Add-in:

- **Install to client** installs the Spreadsheet Add-in software on your client PC's hard drive, so you can run it locally. See "Installing the Spreadsheet Add-in on Your Client PC's Hard Drive" on page 9-7 to learn about this option.
- **Set up client to use shared executables** sets up your client PC to run the Spreadsheet Add-in previously installed on a network drive by the Essbase System Administrator. You install only Windows or Windows NT system files on your client PC's hard drive. See "Setting Up Your PC to Run the Spreadsheet Add-in on the Network Drive" on page 9-10 to learn about this option.

The third option, **Copy files and shared executables to network drive**, lets the Essbase System Administrator install the Spreadsheet Add-in to a network drive, so you can either install and run it on your PC's hard drive, or run it on the network drive.

*Note:* If you are an Essbase System Administrator, see Chapter 2, CD-ROM Installation, on installing the Spreadsheet Add-in to a network drive. Spreadsheet Add-in users, do *not* select the third option unless authorized by the Essbase System Administrator.

The fourth option, **Change network protocol only**, lets you or the Essbase System Administrator install a different network protocol file for your Spreadsheet Add-in.

*Note:* Spreadsheet Add-in users, do *not* select this option if you set up your PC to run the Spreadsheet Add-in on the network drive. All users running—and sharing—a Spreadsheet Add-in on a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

## Network Protocol Files for Your Spreadsheet Add-in

The network protocol file implements the TCP/IP or Named Pipes protocol you selected on installing the Spreadsheet Add-in (or other client software) on your client PC's hard drive, or that the Essbase System Administrator selected on installing the same software to a network drive. The network protocol for 32-bit clients, such as Lotus 1-2-3 97, Lotus 1-2-3 Release 9, or Excel 95 or 97, is `ESSNET.DLL`. The network protocol file resides in the `BIN` directory with the Spreadsheet Add-in software. This can be on your client PC's hard drive or on a network drive, depending on which installation option you chose.

For more information on network protocols, see Chapter 14, Network Configuration Notes.

## Directories and Files on the Network Drive

When the Essbase System Administrator installs the Spreadsheet Add-in to a network drive, the installation program, `SETUP.EXE`, installs the following files on the network drive:

- An installation directory for installing the Spreadsheet Add-in on your client PC's hard drive
- Program files for running the Spreadsheet Add-in on the network drive
- The Essbase installation program (`SETUP.EXE`), and Windows and Windows NT system files for setting up your PC's environment.



If the Essbase System Administrator installs the Spreadsheet Add-in to the network drive (for example, N:), and accepts the default directory `ESSBASE`, the installation program creates the following installation directory for the Spreadsheet Add-in:

```
N:\ESSBASE
    ESSLOT32
```

The installation program, `SETUP.EXE`, is in the `ESSLOT32` directory.

The installation program creates the following additional directories for the program files for the Spreadsheet Add-in:

```
    BIN
    CLIENT
        SAMPLE
    DOCS
        CLIENT
    LOCALE
```

The Spreadsheet Add-in program files are in the `BIN` directory. This includes the Add-in file you add to 1-2-3 to point 1-2-3 to the correct `BIN` directory. The Add-in file for 32-bit Lotus 1-2-3 97 and Lotus 1-2-3 Release 9 is `ESS123.12A`.

The Essbase sample spreadsheets reside in the `\CLIENT\SAMPLE` directory. If you create applications and databases, and store them on your PC's hard drive, they reside in the `CLIENT` directory as follows:

```
    CLIENT
        APPNAME
            DBNAME
```

where `APPNAME` is the name of your application and `DBNAME` is the name of your database.

The *Spreadsheet Add-in User's Guide for 1-2-3* is provided in the `\ESSBASE\DOCS\CLIENT` directory in `.PDF` format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The `.PDF` file is named `ESS123W.PDF`. Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from `WWW.ADOBE.COM`. On the Essbase CD-ROM, the Acrobat Reader executable file is located in the `ADOBE` directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Installing the Spreadsheet Add-in on Your Client PC's Hard Drive

To install the Spreadsheet Add-in on your client PC's hard drive, complete the following steps:

1. Run `SETUP.EXE`:

**From Windows 95, Windows 98, or Windows NT 4.0:**

- a. Click the **Start** button on your Windows desktop.
- b. Choose Settings, and then choose Control Panel.
- c. In the Control Panel, double-click **Add/Remove Programs**.
- d. Click **Install**, and then click **Next**.
- e. When prompted for the command line, specify the following:

`N:\ESSBASE\ESSLOT32\SETUP.EXE` (for 32-bit 1-2-3)

where `N:\ESSBASE` is the name of the network drive and directory where your Essbase System Administrator installed the Spreadsheet Add-in.

The installation program detects if you have the correct version of 1-2-3 for the Spreadsheet Add-in you are installing.

2. Follow the directions on your screen.
3. When the program prompts you to **Choose Installation Type**, choose `Install to client`.

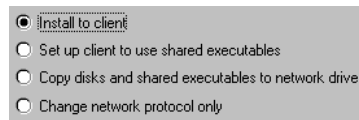


Figure 9-2, Choosing to Install the Spreadsheet Add-in on Your Client PC's Hard Drive

4. When the program prompts you to **Choose Network Protocol**, choose a network protocol. See your Essbase System Administrator if you're not sure which option to choose.
  - TCP/IP compliant
  - Named Pipes compliant

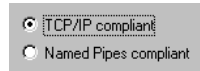


Figure 9-3, Choosing a TCP/IP Network Protocol for 32-bit Spreadsheet Add-in

See your Essbase System Administrator if you're not sure which option to choose.

5. When the program prompts you for **Installation Location**, specify the directory where you want to install the Spreadsheet Add-in.

The default is C:\ESSBASE. Click **Browse** to specify a different location.

**Note:** Install all client software in the same directory. See "Upgrading from Essbase 4.x" on page 9-3 for more information.

6. When prompted for **Confirmation** of what to install and where to install it, click **No** if you want to change your selection. Click **Yes** to accept it.
7. When prompted whether to **Update Environment?**, click **Yes**.

If you don't want the installation program to update your environment, you can update it yourself. See "Manually Updating Your Environment Settings" on page 9-13."

**Note:** If your PATH statement appears on multiple lines in the AUTOEXEC.BAT file, Essbase adds \ESSBASE\BIN to the last line. If you have a previous installation of Essbase in another directory that appears on an earlier line of the PATH statement, you must remove it.

8. If your PC was not previously configured with the correct PATH statement, reboot your PC.

This lets the changes to your environment take effect. You might not need to reboot if you previously installed client software to the same directory where you are installing the Spreadsheet Add-in.

---

## Directories Created When You Install the Spreadsheet Add-in on Your Client PC's Hard Drive

When you install the Spreadsheet Add-in on your client PC's hard drive, the installation program, `SETUP.EXE`, creates the following directories on your client PC's hard drive:

```

BIN
CLIENT
    SAMPLE
DOCS
    CLIENT
LOCALE

```

The Spreadsheet Add-in program files are in the `BIN` directory. This includes the Add-in file you add to 1-2-3 to point 1-2-3 to the correct `BIN` directory. The Add-in file for 32-bit Lotus 1-2-3 97 and Lotus 1-2-3 Release 9 is `ESS123.12A`.

The Essbase sample spreadsheets reside in the `CLIENT\SAMPLE` directory.

If you create applications and databases, and store them on your PC's hard drive, they reside in the `CLIENT` directory as follows:

```

CLIENT
    APPNAME
        DBNAME

```

where `APPNAME` is the name of your application and `DBNAME` is the name of your database.

The *Spreadsheet Add-in User's Guide for 1-2-3* is provided in the `\ESSBASE\DOCS\CLIENT` directory in `.PDF` format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The `.PDF` file is named `ESS123W.PDF`. Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from `WWW.ADOBE.COM`. On the Essbase CD-ROM, the Acrobat Reader executable file is located in the `ADOBE` directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Setting Up Your PC to Run the Spreadsheet Add-in on the Network Drive

To set up your PC to run the Spreadsheet Add-in on the network drive, complete the following steps:

1. Run `SETUP.EXE`:

**From Windows 95, Windows 98, or Windows NT 4.0:**

- a. Click the **Start** button on your Windows desktop.
- b. Choose Settings, and then choose Control Panel.
- c. In the Control Panel, double-click **Add/Remove Programs**.
- d. Click **Install**, and then click **Next**.
- e. When prompted for the command line, specify the following:

`N:\ESSBASE\ESSLOT32\SETUP.EXE` (for 32-bit 1-2-3)

where `N:\ESSBASE` is the name of the network drive and directory where your Essbase System Administrator installed the Spreadsheet Add-in.

**Note:**

The installation program detects if you have the correct version of 1-2-3 for the Spreadsheet Add-in you are installing.

2. Follow the directions on your screen.
3. When the program prompts you to **Choose Installation Type**, choose **Set up client to use shared executables**.

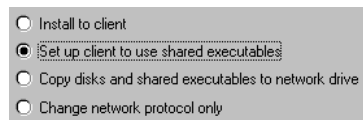


Figure 9-4, Choosing to Set Up Your PC to Run the Spreadsheet Add-in on the Network Drive

4. The program detects where the network installation of the Spreadsheet Add-in resides. If it cannot find it, you are prompted for the directory. Click **Browse** to specify the location.

*Note:* The Essbase shared executable files are in the BIN directory.

5. When prompted for **Confirmation** of what to install and where to install it, click **No** if you want to change your selection. Click **Yes** to accept it.
6. When prompted whether to **Update Environment?**, click **Yes**.

If you don't want the installation program to update your environment, you can update it yourself. See "Manually Updating Your Environment Settings" on page 9-13.

*Note:* If your PATH statement appears on multiple lines in the AUTOEXEC.BAT file, Essbase adds \ESSBASE\BIN to the last line. If you have a previous installation of Essbase in another directory that appears on an earlier line of the PATH statement, you must remove it.

7. If your PC was not previously configured with the correct PATH statement, reboot your PC.

Rebooting lets the changes to your environment take effect. You might not need to reboot if you previously installed client software to the same directory where you are installing the Spreadsheet Add-in.

---

## Directories Used When You Set Up Your PC's Operating Environment to Run the Spreadsheet Add-in on the Network Drive

When you set up your PC to run the Spreadsheet Add-in on the network drive, the installation program, SETUP.EXE, does not create any directories on your client PC's hard drive. It installs only Windows or Windows NT system files on your client PC's hard drive. You run the program files that are on the network drive. They are in the following directories:

```

BIN
CLIENT
    SAMPLE
DOCS
    CLIENT
LOCALE

```

The Spreadsheet Add-in program files are in the BIN directory. This includes the Add-in file you add to 1-2-3 to point 1-2-3 to the correct BIN directory. The Add-in file for 32-bit 1-2-3 is ESS123.12A.

The Essbase sample spreadsheets reside in the CLIENT\SAMPLE directory.

If you create applications and databases, and store them on the network drive, they reside in the `CLIENT` directory as follows:

```
CLIENT
    APPNAME
        DBNAME
```

where `APPNAME` is the name of your application and `DBNAME` is the name of your database.

The *Spreadsheet Add-in User's Guide for 1-2-3* is provided in the `\ESSBASE\DOCS\CLIENT` directory in `.PDF` format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later). The `.PDF` file is named `ESS123W.PDF`. Adobe Acrobat Reader is provided on the Essbase CD-ROM, or you can download Acrobat Reader from `WWW.ADOBE.COM`. On the Essbase CD-ROM, the Acrobat Reader executable file is located in the `ADOBE` directory under the appropriate platform and language-version subdirectories. Launch the executable file, follow the prompts, and provide the information requested to install Acrobat Reader.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Changing the Network Protocol

**Note:** If you set up your client PC to run the Spreadsheet Add-in on the network drive, do not change the network protocol. All users running—and sharing—a Spreadsheet Add-in on a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

To install a different network protocol file for your Spreadsheet Add-in, do the following:

1. Complete steps 1 and 2 of “Installing the Spreadsheet Add-in on Your Client PC’s Hard Drive” on page 9-7.
2. When prompted to **Choose Installation Type**, choose **Change network protocol only**.

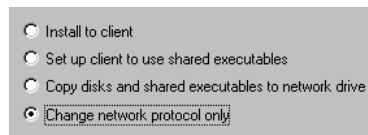


Figure 9-5. Choosing to Change the Network Protocol

3. When prompted to **Choose Network Protocol**, choose a network protocol.
  - TCP/IP compliant
  - Named Pipes compliant

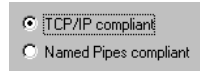


Figure 9-6, Choosing a TCP/IP Network Protocol for 32-bit Spreadsheet Add-in

See your Essbase System Administrator if you're not sure which option to choose.

4. When prompted for **Installation Location**, specify the directory where you installed the Spreadsheet Add-in on your client PC's hard drive.
5. When prompted for **Confirmation**, click **No** if you want to change your selection. Click **Yes** to accept it.

---

## Manually Updating Your Environment Settings

The installation program updates your client PC's operating environment or lets you update it. Updating your environment sets your PC to run the Spreadsheet Add-in software. It does the following:

- Adds ARBORPATH to your Windows AUTOEXEC .BAT file or your Windows NT registry
- Adds a README .TXT file and a 1-2-3 Add-in help file to your Windows or Windows NT Hyperion Essbase 5.0.x program group
- Adds Hyperion Essbase to the 1-2-3 menu bar and points 1-2-3 to the BIN directory where Essbase is installed

Keep these points in mind as you manually update your environment settings using the appropriate instructions in this section:

- If you installed the Spreadsheet Add-in to C:\ESSBASE, simply follow the steps listed in the following sections.
- If you installed the Spreadsheet Add-in to a different drive and directory, substitute the letter of that drive and name of that directory.
- If you set up your PC's operating environment to run the Spreadsheet Add-in on a network drive, substitute the letter of the drive and name of the directory where the Spreadsheet Add-in is installed on the network.



---

## Setting Your Environment on Windows 95 and Windows 98

To update your environment settings on Windows 95 and Windows 98:

1. Add the following environment variable to your `AUTOEXEC.BAT` file:

```
ARBORPATH=C:\ESSBASE
```

where `C:\ESSBASE` is the directory where you installed the Spreadsheet Add-in on your client PC's hard drive, or is the directory where the Essbase System Administrator installed the Spreadsheet Add-in on a network drive.

**Note:** Do not put a space before or after the equals sign (=) in the `ARBORPATH` environment setting.

2. Add `C:\ESSBASE\BIN` to your `PATH` statement.

where `C:\ESSBASE` is the directory where the Spreadsheet Add-in is installed either on your PC's hard drive or on a network drive.

3. Remove references to installations of Essbase in other directories.

**Tip:** You can type `SET` from an MS-DOS command prompt to view your current environment settings.

4. Reboot your PC.
5. Proceed with "Adding the Spreadsheet Add-in" on page 9-16.

---

## Setting Your Environment on Windows NT 4.0

To update your environment settings on Windows NT 4.0:

1. Click the **Start** button on your Windows desktop.
2. Choose Settings | Control Panel.
3. Double-click the System icon. The **System Properties** dialog box appears.
4. Click the **Environment** tab.
5. Look for an existing ARBORPATH setting in the **System Variables** list box.

If the setting is there, select it, then do the following:

- a. Change the information in the **Value** text box to `C:\ESSBASE`.

where `C:\ESSBASE` is the directory where you installed the Spreadsheet Add-in on your client PC's hard drive, or is the directory where the Essbase System Administrator installed the Spreadsheet Add-in on a network drive.

- b. Click **Set**.

If the setting is not there, do the following:

- a. Type ARBORPATH in the **Variable** text box. Do NOT type an equals sign (=).
- b. Type `C:\ESSBASE` in the **Value** text box.

This assumes that `C:\ESSBASE` is the directory where the Spreadsheet Add-in is installed either on your PC's hard drive or on a network drive.

- c. Click **Set**.

**Note:** You are changing system settings, which affect all users who access your machine.

6. Look for other, outdated ARBOR or ESSBASE settings in the **System Variables** list box. If one is there, select it, then do the following to remove it:
  - a. Click **Delete**.
  - b. Click **Set**.
7. Click **OK** to close the **System Properties** dialog box.
8. Close the Control Panel.
9. Log out and log in again, or reboot your PC.
10. Proceed with "Adding the Spreadsheet Add-in" on page 9-16.

---

## Adding the Spreadsheet Add-in

After you manually update your environment settings, you must use the 1-2-3 Add-in facility to add the Spreadsheet Add-in to 1-2-3. This causes Essbase to appear on the 1-2-3 menu bar, and points 1-2-3 to the Spreadsheet Add-in file, `ESS123.12A`, in the `BIN` directory. The Spreadsheet Add-in file is on your PC's hard drive if you chose to install the Spreadsheet Add-in there, or on the network drive if you chose to set up your PC to run the Spreadsheet Add-in there.

To add the Spreadsheet Add-in to Lotus 1-2-3 97 or Lotus 1-2-3 Release 9:

1. In 1-2-3, choose **File | Add-Ins | Manage Add-Ins**.  
The **Manage Add-ins** dialog box appears.
2. Click **Register**.
3. Choose the file `ESS123.12A` in the `BIN` directory where you installed the Spreadsheet Add-in on your PC's hard drive (if you installed the Spreadsheet Add-in there), or in the `BIN` directory where your Essbase System Administrator installed the Spreadsheet Add-in on a network drive (if you chose to set up your PC's operating environment to run the Spreadsheet Add-in there).
4. Click **Open**.
5. Select the `ESS123.12A` add-in file, and click **Done** to close the **Manage Add-Ins** dialog box and start the Spreadsheet Add-in. Make sure there is a check mark next to the `ESS123.12A` add-in file.

The Essbase startup screen appears.

If the startup screen does not appear, or if 1-2-3 does not list Essbase as an Add-in on the menu bar, see "Troubleshooting Steps" on page 9-18 to correct the problem.

---

## Starting the Spreadsheet Add-in

After installing the Spreadsheet Add-in on your PC's hard drive, or setting up your PC to run the Spreadsheet Add-in on the network drive, complete the following steps:

1. Reboot Windows to let the changes to your environment take effect.
2. Run 1-2-3.

The Essbase startup screen appears.

If the startup screen does not appear, see "Troubleshooting Steps" on page 9-18 to correct the problem.

3. Choose **Essbase | Connect** to connect to the Essbase server.

4. The **Essbase System Login** dialog box appears. Enter your server name, user name, and password, then click **OK**.

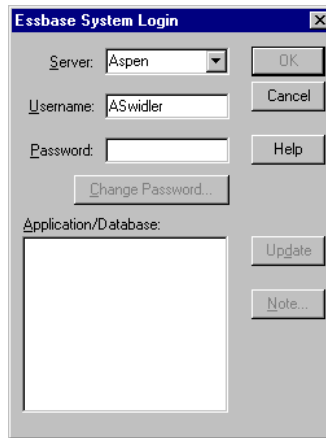


Figure 9-7. Entering the Server Name in the Essbase System Login Dialog Box

An alternate way to enter the server name, if you use TCP/IP, is to enter its IP address. See Chapter 6, *Application Manager Installation*, for details about using an IP address in place of a server name. See your network administrator for your server's IP address.

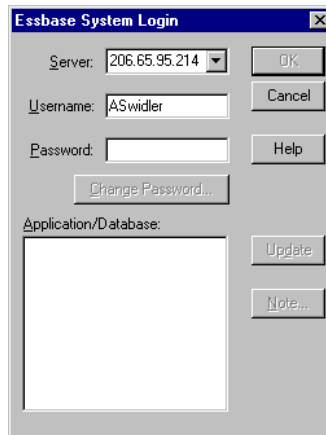


Figure 9-8. Entering the IP Address in the Essbase System Login Dialog Box

5. After you connect to the server, select the application and database to connect to, and then click **OK**.

See the *Spreadsheet Add-in User's Guide for 1-2-3* for more information about connecting to Essbase servers and databases.

---

## Troubleshooting Steps

If the Spreadsheet Add-in is not properly installed or configured, use the following steps to isolate the problem:

- Reboot your computer.
- Check your environment.
- Remove and add the Spreadsheet Add-in.
- Install the Spreadsheet Add-in again.

---

### Reboot Your Computer

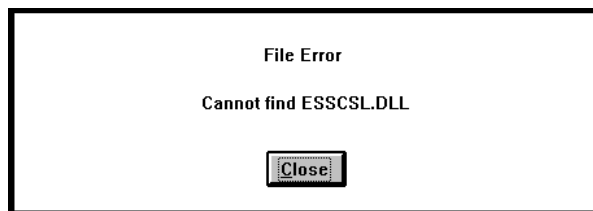
On Windows 95 and Windows 98, reboot your computer.

On Windows NT 4.0, log out and log in again, or reboot your computer. This ensures that changes to your environment settings take effect.

---

### Check Your Environment

If the following message appears, you may have a problem with your `PATH` or the `ARBORPATH` environment variable.



*Figure 9-9, Environment Error Message*

Check your path by typing `PATH` at the MS-DOS command prompt. Make sure that `\ESSBASE\BIN`, or the `BIN` directory of the directory you specified during set up, appears in the `PATH` statement.

Type `SET` and check your `ARBORPATH` setting. It should indicate the drive and directory you specified during set up; for example, `ARBORPATH=C:\ESSBASE` (or the drive and directory you specified during setup).

---

## Remove and Add the Spreadsheet Add-in

If the problem persists, remove the Spreadsheet Add-in from 1-2-3, and add it again. For instructions, see “Adding the Spreadsheet Add-in” on page 9-16.

---

## Install the Spreadsheet Add-in Again

Follow these steps to reinstall the Spreadsheet Add-in:

1. Run the installation program again.
2. Accept the default settings.
3. Be sure to specify the correct network protocol.

---

## Chapter 10

# Runtime Client Installation

This chapter tells you, the client PC user, how to install the Hyperion Essbase Runtime Client from a network drive. The Runtime Client installation lets you install only the Essbase files that are required to run applications made using the Essbase Application Programming Interface. For example, a third-party Essbase partner may write a specialized application that relies on the Essbase API libraries; when you install the Runtime Client, all Essbase library files are provided. Then you need to install the application files from the third-party vendor.

- Install the Runtime Client to the Windows 95, Windows 98, Windows NT 3.51, or Windows NT 4.0 client operating environments
- Manually update your client environment settings if you don't want the installation program to change your environment

To install the Runtime Client from CD-ROM, see Chapter 2, CD-ROM Installation.

This chapter contains the following sections:

- "Before You Install" on page 10-2
- "About Installing the Runtime Client from a Network Drive" on page 10-3
- "Installing the Runtime Client from the Network to Your Client PC's Hard Drive" on page 10-5
- "Setting up Your PC to Use the Runtime Client on the Network Drive" on page 10-7
- "Changing the Network Protocol" on page 10-9
- "Manually Updating Your Environment Settings" on page 10-10

---

## Before You Install

Before you can install the Runtime Client from a network drive, it must be installed to a network drive.

*Note:* Essbase System Administrators, see Chapter 2, CD-ROM Installation, on installing the Runtime Client to a network drive from the CD-ROM.

The Runtime Client requires a Windows- or Windows NT-based PC with the following:

**Table 10-1, Runtime Client Windows System Requirements**

<b>Component</b>	<b>Requirement</b>
Microprocessor	486 or higher
Windows Version	Windows 95, Windows 98, or Windows NT 3.51 or 4.0
RAM	8 MB
Disk Space	13 MB
Network Protocol	TCP/IP or Named Pipes

Also, you should know the following before installing the Runtime Client from a network drive:

- Your client operating environment: Windows 95, Windows 98, or Windows NT 3.51 or 4.0
- The network protocol you use
- Where the Runtime Client software resides on the network



## About Installing the Runtime Client from a Network Drive

When installing from a network drive, the Runtime Client installation program provides the following options:

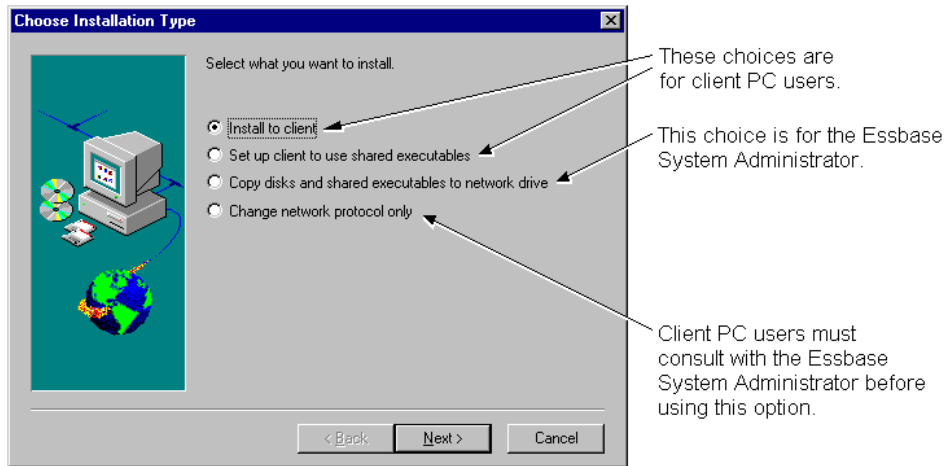


Figure 10-1, Four Runtime Client Installation Options

The first two options, **Install to client** and **Set up client to use shared executables**, give you, the client PC user, the following ways to install the Runtime Client:

- **Install to client** installs the Runtime Client software on your client PC's hard drive. See "Installing the Runtime Client from the Network to Your Client PC's Hard Drive" on page 10-5 to learn this option.
- **Set up client to use shared executables** sets up your client PC's operating environment to use the Runtime Client previously installed on a network drive by the Essbase System Administrator. You install only Windows or Windows NT system files on your client PC's hard drive. See "Setting up Your PC to Use the Runtime Client on the Network Drive" on page 10-7 to learn this option.

The third option, **Copy files and shared executables to network drive**, lets the Essbase System Administrator install the Runtime Client to a network drive, so you, the client PC user, can either install and use it on your PC's hard drive, or use it on the network drive.

**Note:** Essbase System Administrators, see Chapter 2, CD-ROM Installation, on installing the Runtime Client to a network drive. Client PC users, do *not* select the third option unless authorized by the Essbase System Administrator.

The fourth option, **Change network protocol only**, lets you install a different network protocol file for your Runtime Client, after you have installed the Runtime Client.

**Note:** Client PC users, do *not* select this option if you set up your PC's operating environment to use the Runtime Client on the network drive. All users using—and sharing—the Runtime Client on a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

---

## Network Protocol Files for the Runtime Client

The network protocol file implements the TCP/IP or Named Pipes protocol you selected on installing the Runtime Client (or other client software) on your client PC's hard drive, or that the Essbase System Administrator selected on installing the Runtime Client (or other client software) to a network drive. The network protocol for 32-bit clients, such as Excel 97 or Lotus 1-2-3 97, is `ESSNET.DLL`. The network protocol file resides in the `BIN` directory with the Runtime Client software. This can be on your client PC's hard drive or on a network drive, depending on which installation option you chose.

**Note:** For more information on network protocols, see Chapter 14, Network Configuration Notes.

---

## Directories and Files on the Network Drive

When the Essbase System Administrator installs the Runtime Client to a network drive, the installation program, `SETUP.EXE`, installs the following files on the network drive:

- An installation folder for installing the Runtime Client on your client PC's hard drive, and
- Program files for using the Runtime Client from the network drive.

The Essbase installation program (`SETUP.EXE`), and Windows and Windows NT system files for setting up your PC's environment, are also installed.

If the Essbase System Administrator installs the Runtime Client to the network drive *N*, and accepts the default directory `\ESSBASE`, the installation program creates the following directories for the installation disk set for the Runtime Client:

```
N:\ESSBASE
    BIN
    LOCALE
    RUNTIME
```

The installation program, `SETUP.EXE`, is in the `RUNTIME` directory.

The program files for the Runtime Client are in the `BIN` directory.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

---

## Installing the Runtime Client from the Network to Your Client PC's Hard Drive

To install the Runtime Client on your client PC's hard drive, complete the following steps:

1. Run `SETUP.EXE`:

- **From Windows 95, Windows 98, or Windows NT 4.0:**

- a. Click the **Start** button.
- b. Choose Settings | Control Panel.
- c. In the Control Panel, double-click **Add/Remove Programs**.
- d. Click **Install**, and then click **Next**.
- e. When the program prompts for the command line, specify the following:

```
N:\ESSBASE\RUNTIME\SETUP.EXE
```

where *N:\ESSBASE* is the name of the network drive and directory where your Essbase System Administrator installed the Runtime Client.

- **From the Program Manager in Windows NT 3.51,** choose File | Run, then type the following:

```
N:\ESSBASE\RUNTIME\SETUP.EXE
```

where *N:\ESSBASE* is the name of the network drive and directory where your Essbase System Administrator installed the Runtime Client.

2. Follow the directions on your screen.
3. When the program prompts you to **Choose Network Protocol**, choose a network protocol. See your Essbase System Administrator if you're not sure which option to choose.

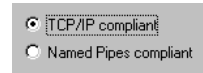


Figure 10-2. Choosing a TCP/IP Network Protocol for the Runtime Client

4. When the program prompts for **Installation Location**, specify the directory where you want to install the Runtime Client.

The default is `C:\ESSBASE`. Click **Browse** to specify a different location.

Install all client software in the same directory. See "About Installing the Runtime Client from a Network Drive" on page 10-3 for more information.

5. The final installation prompt asks you to confirm that the chosen directory is correct. Click **No** if you want to change your selection. Click **Yes** to accept it.

---

## Directories Created When You Install the Runtime Client on Your Client PC's Hard Drive

When you install the Runtime Client on your client PC's hard drive, the installation program, `SETUP.EXE`, creates the following directories on your client PC's hard drive:

```
ESSBASE
  BIN
  LOCALE
```

The Runtime Client program files are in the `BIN` directory.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

## Setting up Your PC to Use the Runtime Client on the Network Drive

To set up your PC to use the Runtime Client from the network drive, complete the following steps.

1. Run `SETUP . EXE`:
  - **From Windows 95, Windows 98, or Windows NT 4.0:**
    - a. Click the **Start** button.
    - b. Choose Settings | Control Panel.
    - c. In the Control Panel, double-click **Add/Remove Programs**.
    - d. Click the **Install** button, and then click the **Next** button.
    - e. When the program prompts for the command line, specify the following:
 

```
N:\ESSBASE\RUNTIME\SETUP . EXE
```

 where *N:\ESSBASE* is the name of the network drive and directory where your Essbase System Administrator installed the Runtime Client.
  - **From the Program Manager in Windows NT 3.51,** choose File | Run, then type the following:
 

```
N:\ESSBASE\RUNTIME\SETUP . EXE
```

 where *N:\ESSBASE* is the name of the network drive and directory where your Essbase System Administrator installed the Runtime Client.
2. Follow the directions on your screen.
3. When the program prompts you to **Choose Installation Type**, choose **Set up client to use shared executables**.

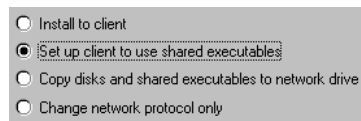


Figure 10-3. Choosing to Set Up Your PC to Use the Runtime Client from the Network Drive

4. The program detects where the network installation of the Runtime Client resides. If it cannot find it, you are prompted for the directory. Click **Browse** to specify the location.

**Note:**

The Essbase shared runtime files are in the `BIN` directory.

5. When the program prompts for **Confirmation** of what to install and where to install it, click **No** if you want to change your selection. Click **Yes** to accept it.
6. When the program prompts whether to **Update Environment?**, click **Yes**.

If you don't want the installation program to update your environment, you can update it yourself. See "Manually Updating Your Environment Settings" on page 10-10.

**Note:**

If your `PATH` statement appears on multiple lines in the `AUTOEXEC.BAT` file, Essbase adds `\ESSBASE\BIN` to the last line. If you have a previous installation of Essbase in another directory that appears on an earlier line of the `PATH` statement, Essbase does not remove this reference. You must remove it.

7. If your PC was not previously configured to the correct path, reboot your PC.

This lets the changes to your environment take effect. You might not need to reboot if you previously installed client software to the same directory where you are installing the Runtime Client.

---

## Directories Used When You Set Up Your PC to Use the Runtime Client on the Network Drive

When you set up your PC to use the Runtime Client on the network drive, the installation program, `SETUP.EXE`, does not create any directories on your client PC's hard drive. It installs only Windows or Windows NT system files on your client PC's hard drive. You use the program files that are on the network drive.

The network drive has the following directories:

```
ESSBASE
    BIN
    LOCALE
```

The Runtime Client program files are in the `BIN` directory.

The `LOCALE` directory contains the character-set files necessary for all the languages Essbase supports, including English.

## Changing the Network Protocol

To install a different network protocol file for the Runtime Client, if you installed it on your client PC's hard drive, follow the steps in this section.

**Note:** Client PC users, do *not* select this option if you set up your PC's operating environment to use the Runtime Client from the network drive. All users using—and sharing—the Runtime Client from a network drive must use the same network protocol file. Only the Essbase System Administrator should change the protocol of a shared network installation.

1. Follow steps 1 and 2 of "Installing the Runtime Client from the Network to Your Client PC's Hard Drive" on page 10-5.
2. When the program prompts you to **Choose Installation Type**, choose **Change network protocol only**.

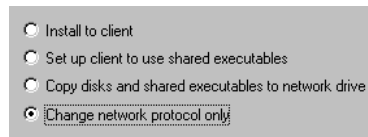


Figure 10-4, Choosing to Change the Network Protocol

3. When the program prompts you to **Choose Network Protocol**, choose a network protocol. See your Essbase System Administrator if you're not sure which option to choose.

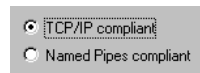


Figure 10-5, Choosing a TCP/IP Network Protocol for the Runtime Client

4. When the program prompts you for **Installation Location**, specify the directory where you installed the Runtime Client on your client PC's hard drive; for example, `\ESSBASE\BIN`.

When the program prompts for **Confirmation**, click **No** if you want to change your selection. Click **Yes** to accept it.

---

## Manually Updating Your Environment Settings

If you don't want the installation program to update your PC's environment, you need to set up the environment manually.

Keep these points in mind as you apply the following steps to manually update your environment settings:

- If you installed the Runtime Client to `C:\ESSBASE`, simply complete the following steps.
- If you installed the Runtime Client to a different drive and directory, substitute the letter of that drive and name of that directory.
- If you set up your PC's operating environment to use the Runtime Client from a network drive, substitute the letter of the drive and name of the directory where the Runtime Client is installed on the network.

---

## Setting Your Environment on Windows 95 and Windows 98

To update your environment settings on Windows 95 and Windows 98:

1. Add the following environment variable to your `AUTOEXEC.BAT` file:

```
ARBORPATH=C:\ESSBASE
```

Do not put a space before or after the equals sign (=) in the `$ARBORPATH` environment setting.

2. Add `C:\ESSBASE\BIN` to your `PATH` statement.
3. Remove references to installations of Essbase in other directories.

**Tip:**

You can type `SET` from a DOS command prompt to view your current environment settings.

4. Reboot your PC.



---

## Setting Your Environment on Windows NT 3.51

To update your environment settings on Windows NT 3.51:

1. Start the Control Panel.
2. Double-click the System icon. The **System** dialog box appears.
3. Look for an existing `ARBORPATH` setting in the **System Environment Variables** list box.

If the setting is there, select it, then do the following:

- a. Change the information in the **Value** text box to `C:\ESSBASE`.
- b. Click **Set**.

If the setting is not there, do the following:

- a. Type `ARBORPATH` in the **Variable** text box. Do NOT type an equals sign (=).
- b. Type `C:\ESSBASE` in the **Value** text box.
- c. Click **Set**.

**Note:** You are changing system settings, which affect all users who access your machine.

4. Look for an existing `PATH` setting in the **System Environment Variables** list box. Select it, then do the following:
  - a. Remove any outdated `ARBOR` or `ESSBASE` directories from the list in the **Value** text box.
  - b. Add `C:\ESSBASE\BIN` to the list of directories in the path in the **Value** text box. Use a semicolon if necessary to separate directory names.
  - c. Click **Set**.
5. Click **OK** to close the **System** dialog box.
6. Close the Control Panel.
7. Log out and log in again, or reboot your PC.

---

## Setting Your Environment on Windows NT 4.0

To update your environment settings on Windows NT 4.0:

1. Click the **Start** button on your desktop.
2. Choose Settings | Control Panel.
3. Double-click the System icon. The **System Properties** dialog box appears.
4. Click the **Environment** tab.
5. Look for an existing ARBORPATH setting in the **System Variables** list box.

If the setting is there, select it, then do the following:

- a. Change the information in the **Value** text box to C:\ESSBASE.
- b. Click **Set**.

If the setting is not there, do the following:

- a. Type ARBORPATH in the **Variable** text box. Do NOT type an equals sign (=).
- b. Type C:\ESSBASE in the **Value** text box.
- c. Click **Set**.

**Note:**

You are changing system settings, which affect all users who access your machine.

6. Look for other, outdated ARBOR or ESSBASE settings in the **System Variables** list box. If one is there, select it, then do the following to remove it:
  - a. Click the **Delete** button.
  - b. Click **Set**.
7. Click OK to close the **System Properties** dialog box.
8. Close the Control Panel.
9. Log out and log in again, or reboot your PC.

The Hyperion Essbase API is available for the following platforms:

- Windows NT, Windows 95, and Windows 98
- AIX
- HP-UX
- Solaris

This chapter contains the following sections:

- “API System Requirements” on page 11-2
- “Installing the API” on page 11-3
- “Directories Created on Installing the API Software” on page 11-6
- “Updating Your Environment Variables” on page 11-7

*Note:* You must enter your license number during installation. See Chapter 1, Product Components and Software Registration, on software registration.

---

## API System Requirements

The API requires a system that meets minimal hardware and software requirements. See the following section that is appropriate for your platform.

---

### AIX API Requirements

The API for AIX requires a system with at least the following:

*Table 11-1, AIX API System Requirements*

Component	Requirement
System	PowerPC, including RS 6000
AIX	AIX 4.2 or 4.3
RAM	32 MB (64 MB or more recommended)
Disk Space	5 MB
Library	Kernal-threads (with pthread API) for AIX

---

### HP-UX API Requirements

The API for HP-UX requires a system with at least the following:

*Table 11-2, HP-UX API System Requirements*

Component	Requirement
System	PA-RISC machines
HP-UX	HP-UX 10.20 or 11.0
RAM	32 MB (64 MB or more recommended)
Disk Space	6 MB
Library	DCE required for multithreading: Distributed Computing Environment (DCE) thread library for Version 1.4 or later

---

## Solaris API Requirements

The API for Solaris requires a system with at least the following:

*Table 11-3, Solaris API System Requirements*

Component	Requirement
System	Sun SPARC or ULTRASPARC machines
Solaris	Solaris 2.5.1 or 2.6
RAM	32 MB (64 MB or more recommended)
Disk Space	6 MB
Library	Solaris Threads

---

## Installing the API

On each supported platform, you install the API from the CD-ROM. See the following section that is appropriate for your platform.

---

### Installing the API on Windows or Windows NT

To install the API on Windows or Windows NT, follow these steps:

1. Insert the Hyperion Essbase CD-ROM into your CD-ROM drive.
2. Do one of the following, depending on your platform:  
From Windows 95, Windows 98 or Windows NT 4.0, do the following:
  - a. Click the **Start** button from your Windows desktop.
  - b. Choose **Settings**, and then choose **Control Panel**.
  - c. In the **Control Panel**, double-click **Add/Remove Programs**.

- d. Click the **Install** button, and then click the **Next** button.
- e. When prompted for the command line, specify the following:

```
D:\SETUP.EXE
```

where *D* is your CD-ROM drive. Press **Enter**.

From the Program Manager in Windows NT 3.51, choose **File | Run**. Then type the following:

```
D:\SETUP.EXE
```

where *D* is your CD-ROM drive. Press **Enter**.

3. When prompted for the destination directory name, specify where you want to install the API. The default is `C:\ESSBASE`. You can install to a network drive and then share the library files with other programmers.
4. When prompted to select a network protocol, click one of the choices. Essbase creates an `ESSNET.DLL` (32-bit) file that corresponds to your network protocol.
5. Answer whether you want to install the online HTML documentation.

**Note:**

Instead of installing the HTML documentation locally, you can copy the `DOCS` directory from the root directory of the CD-ROM to a network drive, so all programmers can access the online HTML documentation from there. Or, you can access the HTML documentation in the `DOCS` directory of the CD-ROM itself. To view the HTML documentation, open the `INDEX.HTM` file in the `DOCS` directory. To learn more about HTML documentation, see “Viewing Essbase HTML Documents” on page xviii in the Introduction.

## Installing the API on UNIX

On UNIX,

- You must complete certain tasks before you can install the API.
- From the CD-ROM, you can install either from the root directory or from a product directory.

### ***Before You Install the API on UNIX***

Before you install the API on any UNIX platform, do the following:

1. Create an account called `arbor` which has **Read/Write/Execute** access to the target directory for the Essbase installation. Give this account the same default directory you are using for Essbase (for example, `/home/essbase`). Ideally, the `arbor` account will own this target directory.

**Note:**

The installation program requires you to be logged on as `arbor`.

2. Create a target directory for the Essbase files; for example,

```
/home/essbase
```

If you do not create a target directory, the installation program prompts you for permission to create it. If you want to use, or fall back to, a previous version of Essbase, install Essbase Version 5.0.2 to a different directory than the previous version. Do not create directories under `/essbase`. The installation program creates the appropriate subdirectories.

3. Apply the latest patches for your operating system in areas that might affect Essbase.

**Warning:** Some operating system vendors issue patches frequently.

---

### ***Installing the API on UNIX from the CD-ROM***

To install the API on UNIX from either the root directory, or a product directory, of the CD-ROM, do the following:

1. Log in to the server as `arbor`.
2. Insert the CD-ROM into your CD-ROM drive.
3. Depending on where you want to install from, do one of the following:

If you want to install from the root directory, do the following:

- a. Change to the root directory of the CD-ROM (for example, `cd /cdrom/essbase_502`).
- b. Use the `ls` command to find `setup.sh` (or `SETUP.SH`). Some UNIX CD-ROM drivers list file names in uppercase. Others list them in lowercase. See whether it is in uppercase or lowercase.
- c. Enter `./setup.sh` or `./SETUP.SH`, depending on what you learned in step b.
- d. When prompted, choose to install the API.

If you want to install from the product directory, do the following:

- a. Change to the CD-ROM directory for the product you want to install (for example, `cd /solaris/api`).
  - b. Use the `ls` command to find `essinst` (or `ESSINST`). Some UNIX CD-ROM drivers list file names in uppercase. Others list them in lowercase. See whether it is in uppercase or lowercase.
  - c. Enter `./essinst` or `./ESSINST`, depending on what you learned in step b.
4. Follow the prompts and provide the information requested.

**Note:** To cancel installation at any time, press `Ctrl-C`.

5. When prompted, enter your license number exactly as it appears on your registration card.

See Chapter 1, Product Components and Software Registration, for more information on software registration.

6. When prompted, type the directory where you want to install the API.

The installation program uses `/home/essbase` as the default directory. You can choose another directory, and if it does not exist, the installation program creates it for you.

7. Answer whether you want to install the online HTML documentation.

**Note:** The installation program decompresses the `api.tz` file, and the `docs.tz` file if you choose to install the online HTML documentation, and copies files to the directory you choose (or the default directory), and to subdirectories it creates under that directory. Do not create these subdirectories yourself.

8. Update your environment before you use the API. See “Updating Your Environment Variables” on page 11-7.

---

## Directories Created on Installing the API Software

The API Installation program creates the following directories, if they do not exist:

Windows and Windows NT	UNIX
ESSBASE	<code>/home/essbase</code>
API	<code>api</code>
INCLUDE	<code>include</code>
LIB	<code>lib</code>
REDIST	<code>redist</code>
LOCALE	<code>locale</code>
DOCS	<code>docs</code>

This assumes you accepted the default directory, `C:\ESSBASE` or `/home/essbase`, during installation.

**Note:** When you install the online HTML documentation, the installation program creates a `DOCS` directory (`/docs` directory on UNIX platforms). It contains numerous subdirectories, as well as the `INDEX.HTM` (or `index.htm`) file you open to view the HTML documentation. To learn more about HTML documentation, see “Viewing Essbase HTML Documents” on page xviii in the Introduction.

The `LOCALE` directory (`locale` on UNIX) contains the character-set files necessary for all the languages Essbase supports, including English.



---

## Updating Your Environment Variables

You may need to update your environment variable to use the API. Read the following section that is appropriate for your platform.

---

### Setting Your Environment on Windows and Windows NT

Add the `LIB` and `INCLUDE` directories to your `PATH` statement. For example, if you installed Essbase to the default directory, add the following to your `PATH` statement:

```
C:\ESSBASE\API\LIB
C:\ESSBASE\API\INCLUDE
```

**Note:** If you use the Hyperion Essbase Spreadsheet Add-in for Excel and the Essbase API, make sure that `C:\ESSBASE\BIN` precedes these two statements in your `PATH` statement. If `C:\ESSBASE\BIN` comes after `C:\ESSBASE\API\LIB` or `C:\ESSBASE\API\INCLUDE` in your `PATH` statement, Excel will not add the Spreadsheet Add-in automatically. You will have to add the Add-in to Excel yourself, using `Tools | Add-Ins` on the Excel menu bar.

---

### Setting Your Environment on AIX and Solaris

To link and run your program, add the following to the `LD_LIBRARY_PATH` variable:

```
$ARBORPATH/lib
```

For example, if you are using the C shell, the `.cshrc` file might look like this:

```
setenv ARBORPATH /essbase
setenv LD_LIBRARY_PATH
/opt/SUNWspro/lib:/usr/openwin/lib:/usr/lib:$ARBORPATH/lib
```

**Note:** See the online HTML documentation for information on the files you need to compile, link, and distribute your programs.

---

## Setting Your Environment on HP-UX

Essbase on HP-UX uses the environment variables `LPATH` (for linking) and `SHLIB_PATH` (at run time).

If you are using static libraries, you don't need to use environment variables. If you are using dynamic libraries, you need to add the following path to your `LPATH` search path environment variable to link your program:

```
/home/essbase/api/lib
```

where */home* is the name of your home directory and */essbase* is the directory where you chose to install the API.

All shared library (`.sl`) files should be located in a directory specified in the `LPATH` search path. For example, the `LPATH` variable can be set to:

```
./lib:/usr/lib:$ARBORPATH/api/lib
```

You must do one of the following to run your program:

- Store the shared library files in the same directory you linked from.
- Link your program with the `+s` flag. The `+s` flag allows you to put the `.sl` files at any location and use the `SHLIB_PATH` environment variable to search for it at run time.

**Note:** See the online HTML documentation for information on the files you need to compile, link, and distribute your programs.

---

## Chapter 12

# SQL Interface Installation

This chapter tells you, the Hyperion Essbase Administrator, how to install Hyperion Essbase SQL Interface from CD-ROM. It tells you what to do before you install SQL Interface, and how to set environment variables after you install it.

For installations on UNIX, this chapter also tells you what to do after you install and before you link your drivers to SQL Interface.

After you install SQL Interface, and set your environment variables, you must configure your data source. You may need to configure your ODBC driver. To do these things, see the *SQL Interface Guide*. This guide is provided in the \ESSBASE\DOCS\CLIENT directory in .PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later).

**Note:** Adobe Acrobat Reader is provided on the Essbase CD-ROM in the ADOBE directory under the appropriate platform and language-version subdirectories. You can also download Acrobat Reader from [WWW.ADOBE.COM](http://WWW.ADOBE.COM). To install Acrobat Reader, launch the executable file, follow the prompts, and provide the information requested.

This chapter contains the following sections:

- “Before You Install SQL Interface” on page 12-2
- “Installing SQL Interface on Windows NT” on page 12-4
- “Installing SQL Interface on UNIX” on page 12-7

---

## Before You Install SQL Interface

Before you install SQL Interface, consider the following information:

- On Windows NT, you can install SQL Interface when you install the Essbase server, or you can install it afterward. On UNIX, you must install SQL Interface after you install the Essbase server. On every installation, you are asked for your license number. For more information on software registration, see Chapter 1, Product Components and Software Registration.
- On all platforms, you should install your server, update your environment, and verify it is working, before you install SQL Interface.
- If you have Version 5.0.2 of the Essbase server, you must install Version 5.0.2 of SQL Interface. Earlier versions of SQL Interface are not tested and verified to work with Version 5.0.2 of the Essbase server.
- To run SQL Interface on HP-UX, you must have Version 5.0.1 Patch 2 or later.
- On Windows NT, each INTERSOLV ODBC driver has its own help file. You can access it using the ODBC Administrator. See the *SQL Interface Guide*.
- The INTERSOLV ODBC drivers come with a document called *INTERSOLV DataDirect Connect ODBC Reference*. This reference is in PDF format for online viewing and printing in Adobe Acrobat Reader (Version 3.0.1 or later).

To access the reference, double-click the `BOOKS.PDF` file in the `ARBORPATH\ODBCDOCS` (`ARBORPATH/odbcdocs` on UNIX) directory on the server where you installed SQL Interface.

---

## Setting Up Your RDBMS before You Install SQL Interface

Before you install SQL Interface, install your relational database management system (RDBMS), including the correct database client—for example, the correct version of Client Application Enabler (CAE) for DB2, or Open-Client for Sybase.

**Note:** See the *Start Here* booklet for information on INTERSOLV ODBC drivers and supported SQL Interface platforms.

Also, set the environment variables required to run your RDBMS. For example, on UNIX,

for Oracle:

- Set `ORACLE_HOME` and `ORACLE_SID`.
- Make sure that `SHLIB` contains the Oracle library path (`$ORACLE_HOME/lib`).

for Informix:

- Set INFORMIXDIR and INFORMIXSERVER.
- Make sure that SHLIB contains the Informix library path (\$INFORMIXDIR/lib).

for Sybase:

- Set SYBASE and DSQUERY.
- Make sure that SHLIB contains the Sybase library path (\$SYBASE/lib).

On Windows NT, environment variables should be set in the PATH variable and Registry when you install your RDBMS.

*Note:* For more information, see your RDBMS documentation.

## Setting Your Library Path on UNIX before You Install SQL Interface

On UNIX, add the \$ARBORPATH/dlls directory to your library path:

- On AIX and Solaris, add the \$ARBORPATH/dlls directory to the LD\_LIBRARY\_PATH variable:

For example, if you are using the C shell, the .cshrc file might look like this:

```
setenv ARBORPATH /essbase
setenv LD_LIBRARY_PATH /usr/lib:$ARBORPATH/dlls
```

- On HP-UX, add the \$ARBORPATH/dlls directory to the SHLIB\_PATH variable:

For example, if you are using the C shell, the .cshrc file might look like this:

```
setenv ARBORPATH /essbase
setenv SHLIB_PATH /usr/lib:$ARBORPATH/dlls
```

The .profile file, if you are using the Bourne or Korn shell, might look like this:

```
ARBORPATH=/home/essbase
export ARBORPATH
LIBPATH=$LIBPATH:/home/essbase/bin
export LIBPATH
PATH=/usr/bin:/etc:/usr/sbin:/usr/ucb:$ARBORPATH/dlls:/usr/bin/
X11:/sbin:
export PATH
```

- Notes:*
- HP-UX uses SHLIB\_PATH to search for shared library files at runtime, and LPATH to link to shared library files while compiling.
  - For more information, see your UNIX documentation.

---

## Installing SQL Interface on Windows NT

You install SQL Interface on Windows NT from the Hyperion Essbase CD-ROM. To install from CD-ROM, see Chapter 2, CD-ROM Installation.

---

### Directories and Files on Windows NT

If you accept the default during installation, the installation program places all SQL Interface files in the `C:\ESSBASE\BIN` directory on your Windows NT server machine. If you choose to install SQL Interface in a different directory from the default, the installation program stores the files in the `BIN` directory in the appropriate path.

In particular, the installation program installs `ESSSQL.DLL`. It also installs ODBC driver files, and their corresponding help files.

---

### About Setting Your Environment on Windows NT

On Windows NT, you can choose to have the installation program update your environment, or you can update it manually after installation. To update your environment manually on Windows NT, you must change the Windows NT registry to include the correct path and ODBC drivers.

---

### Manually Updating Your Environment on Windows NT

To update the environment on Windows NT, the installation program changes several items in the Windows NT registry and removes outdated settings. To manually update the Windows NT registry, complete the following steps:

1. Start Windows NT.
2. From Program Manager, choose File | Run. Specify the following program:  
`C:\WINDOWS\SYSTEM32\REGEDT32.EXE`  
(Your path might be different depending on how you installed Windows NT.)
3. Double-click `HKEY_LOCAL_MACHINE`.
4. In the `HKEY_LOCAL_MACHINE` window, double-click the following folders in succession:  
Software  
ODBC  
ODBCINST.INI

5. Under each of these folders (and any other ODBC driver folders displayed), complete steps a through f to update the **Driver** and **Setup** options. Note that the list of drivers shown here is an example only; the actual driver names may differ somewhat depending on the versions you have installed.

INTERSOLV dBASEFile (\*.dbf)  
 INTERSOLV Excel File (\*.xls)  
 INTERSOLV Oracle 7  
 INTERSOLV SQL Server  
 INTERSOLV Text File (\*.\*)

- a. Double-click **Driver**. The **String Editor** dialog box appears.  
 b. In the **String** text box, change the path string to include:

C:\ESSBASE\BIN

If you installed Essbase in a different directory from the default, type the appropriate path; for example, D:\ESSBASE\BIN.

Make sure the driver names are correct. In the example below, the driver name is outdated:

C:\ESSBASE\BIN\ARDBF11.DLL

So, you would change the driver name to:

C:\ESSBASE\BIN\ARDBF13.DLL

**Note:** See the *SQL Interface Guide* and the *INTERSOLV DataDirect Connect ODBC Reference* for more information on drivers.

- c. Click **OK**.  
 d. Double-click **Setup**. The **String Editor** dialog box appears.  
 e. In the **String** text box, change the path string to include:

C:\ESSBASE\BIN

This is the same path you typed in step b. If you installed Essbase in a different directory from the default, type the appropriate path; for example, D:\ESSBASE\BIN.

Make sure the driver names are correct. In the example below, the driver name is outdated:

C:\ESSBASE\BIN\ARDBF11.DLL

In this case, you would change the driver name to:

C:\ESSBASE\BIN\ARDBF13.DLL

- f. Click **OK**.

6. Open the HKEY\_CURRENT\_USER window.
7. Double-click the following folders in succession:

Software  
ODBC  
ODBC.INI

Double-click each of the file types listed under ODBC . INI, and, for each file type, complete the following steps, a through f, to update the **Driver** and **Driver32** options:

- a. Double-click **Driver**. The **String Editor** dialog box appears.
- b. In the **String** text box, change the path string to include:

C:\ESSBASE\BIN

If you installed Essbase in a different directory from the default, type the appropriate path; for example, D:\ESSBASE\BIN.

Make sure the driver names are correct. In the example below, the driver name is outdated:

C:\ESSBASE\BIN\ARDBF11.DLL

In this case, you would change the driver name to:

C:\ESSBASE\BIN\ARDBF13.DLL

- c. Click **OK**.
- d. Double-click **Driver32**. The **String Editor** dialog box appears.
- e. In the **String** text box, change the path string to include:

C:\ESSBASE\BIN

If you have installed Essbase in a different directory from the default, type the appropriate path; for example, D:\ESSBASE\BIN.

Make sure the driver names are correct. In the example below, the driver name is outdated:

C:\ESSBASE\BIN\ARDBF11.DLL

In this case, you would change the driver name to:

C:\ESSBASE\BIN\ARDBF13.DLL

- f. Click **OK**.
8. Choose Registry | Exit to close the REGEDT32 . EXE program.
9. Run ODBC Setup to configure each driver.
10. Reboot your computer to let the changes take effect.



---

## Installing SQL Interface on UNIX

You install SQL Interface on UNIX (AIX, HP-UX, and Solaris) from the Hyperion Essbase CD-ROM. To install from CD-ROM, see Chapter 2, CD-ROM Installation.

---

### Directories and Files on UNIX

If you accept the default during installation, the installation program:

- Copies the `.odbc.ini` file into the `$ARBORPATH/bin` directory on your UNIX server machine.
- Places all SQL Interface files in the `$ARBORPATH/dlls` directory on your UNIX server machine.

If you accepted the default target directory during installation, `$ARBORPATH` is `/home/essbase`.

In particular, the installation program installs the INTERSOLV ODBC drivers file:

- `libesssql.insolv.a` on AIX
- `libesssql.insolv.sl` on HP-UX
- `libesssql.insolv.so` on Solaris

When the installation program installs the Essbase server on UNIX, it installs:

- The SQL Interface library file:
  - `libesssql.a` on AIX
  - `libesssql.sl` on HP-UX
  - `libesssql.so` on Solaris
- A stub ODBC drivers file:
  - `libesssql.arbor.a` on AIX
  - `libesssql.arbor.sl` on HP-UX
  - `libesssql.arbor.so` on Solaris

The SQL Interface library file symbolically links to the stub ODBC drivers file until `inst-sql.sh` links the library file to the INTERSOLV ODBC drivers file. See “Linking SQL Interface to Your ODBC Driver on UNIX” on page 12-12.

---

## About Setting Your Environment on UNIX

On UNIX, you run `essinst`, or `setup.sh` (which runs `essinst`), to install SQL Interface. Then, you run `inst-sql.sh` to symbolically link the SQL Interface library file to your INTERSOLV ODBC drivers file. Before and after you run `inst-sql.sh`, you must set the proper environment for your ODBC driver.

The following sections address setting your environment on UNIX:

- “Before You Link SQL Interface to Your INTERSOLV ODBC Driver on UNIX” on page 12-8
- “Linking SQL Interface to Your ODBC Driver on UNIX” on page 12-12
- “After You Link SQL Interface to Your ODBC Driver on UNIX” on page 12-13

---

## Before You Link SQL Interface to Your INTERSOLV ODBC Driver on UNIX

After you install SQL Interface on AIX, HP-UX, or Solaris, you must set certain environment variables, before you link SQL Interface to your ODBC driver by running `inst-sql.sh`. The steps you take depend on the driver and platform you use.

---

### ***Before You Link SQL Interface to an INTERSOLV Oracle, Sybase, or Informix Driver on AIX or Solaris***

The installation program prompts you to choose your INTERSOLV driver. This section assumes you chose the INTERSOLV Oracle, Sybase, or Informix driver on either AIX or Solaris.

To set your environment so you can link SQL Interface to the driver you chose, complete the following steps after you run `setup.sh`, but before you run `inst-sql.sh`.

**Note:** These steps are for the INTERSOLV Oracle driver, but would be similar for an INTERSOLV Informix or Sybase driver.

1. Ensure that you have the Oracle 7 server—not just the Oracle 7 client—installed, and that you can connect to it from your current machine.
2. Log on as user `oracle`.

3. Change to the `ORACLE_HOME` directory.
4. Determine whether the file `ksms.imp` exists. This file provides linking information for creating a shared library. Enter the following command:
 

```
# find . -name ksms.imp -print
```
5. If `ksms.imp` exists, go to step 6. If it does not exist, generate and store the file as follows:
 

```
# cd $ORACLE_HOME/bin
# genksms > ksms.imp
# mv ksms.imp ../lib
```
6. Issue the `Exit` command.

For more information about setting environment variables for INTERSOLV Oracle or Informix drivers, see the *INTERSQLV DataDirect Connect ODBC Reference*. Also see Oracle or Informix documentation.

---

### ***Before You Link SQL Interface to an INTERSOLV Oracle Driver on HP-UX***

The installation program prompts you to choose your INTERSOLV driver. This section assumes you chose the INTERSOLV Oracle driver on HP-UX.

To set your environment so you can link SQL Interface to the driver you chose, do the following after you run `setup.sh`, but before you run `inst-sql.sh`.

On Oracle 7.3, if the `$ORACLE_HOME/lib` directory does not contain the `libclntsh.sl` file, make the file by completing the following steps:

1. Log in as user `oracle`.
2. Change to the `$ORACLE_HOME/rdbms/lib` directory.
3. Modify the `clntsh.mk` file by adding `-lsql` to the end of each `ld` command.
4. Type the following:
 

```
make -f clntsh.mk shlib
```

**Note:** For more information about setting environment variables for the INTERSOLV Oracle driver, see the *INTERSQLV DataDirect Connect ODBC Reference*. Also see Oracle documentation.

---

### ***Before You Link SQL Interface to an INTERSOLV DB2 Driver on AIX or Solaris***

The installation program prompts you to choose between the INTERSOLV DB2 driver, and the IBM DB2 driver. This section assumes you chose the INTERSOLV DB2 driver on either AIX or Solaris.

To set your environment so you can link SQL Interface to the driver you chose, complete the following steps after you run `setup.sh`, but before you run `inst-sql.sh`:

1. Log in as the instance owner, and make sure you have Read or Read/Write access to `$ARBORPATH`.
2. Set the environment variable, `INSTHOME`, to point to the home directory of your DB2 instance.
3. Set the environment variables `DB2INSTANCEPATH` and `DB2INSTANCE` to point to `INSTHOME` and the instance itself, respectively.

Here is a Bourne shell example:

```
DB2INSTANCEPATH=$INSTHOME
DB2INSTANCE=inst1
```

For more information about setting environment variables for the INTERSOLV DB2 driver, see the *INTERSQLV DataDirect Connect ODBC Reference*. Also see DB2 documentation.

---

### ***Before You Link SQL Interface to an IBM DB2 Driver on AIX***

The installation program prompts you to choose between the INTERSOLV DB2 driver, and the IBM DB2 driver. This section assumes you chose the IBM DB2 driver on either AIX or Solaris.

To set your environment so you can link SQL Interface to the driver you chose, complete the following steps after you run `setup.sh`, but before you run `inst-sql.sh`:

1. Make sure you either have the IBM Call-Level Interface (or CLI) for DB2 for AIX on the same AIX machine that you are using for SQL Interface.

2. Create a configuration file, `esssql.cfg`, as described in the *SQL Interface Guide*.

Here is an example of an `esssql.cfg` file:

```
[
Description "IBM DB2 Call Level Interface"
DriverName db2.o
Database 1
Password 1
UserId 1
SingleConnection 0
UpperCaseConnection 0
IsQEDriver 0
]
```

3. Set the environment variable `INSTHOME` to point to the home directory of your DB2 instance.
4. Define DB2 *instance* names for SQL Interface. An *instance* corresponds to one or more databases. For every database you want to connect to:
  - a. You must ensure that an instance corresponding to that database exists.
  - b. You must have Read or Read/Write access to the driver manager library, `libodbc.a` in `INSTHOME/sql/lib/odbc/lib`.
  - c. You must include the instance in the `LIBPATH` as shown in step 6.
5. Log in as user `arbor` with Read or Read/Write access to the driver manager library, `libodbc.a` in `INSTHOME/sql/lib/odbc/lib`.
6. Set the environment variables `DB2INSTANCEPATH`, `DB2INSTANCE`, and `LIBPATH` as in the following Bourne shell example:

```
DB2INSTANCEPATH=$INSTHOME
DB2INSTANCE=inst1
LIBPATH=/lib:/usr/lib:/home/essbase/bin:$DB2INSTANCEPATH/
sql/lib/lib:$DB2INSTANCEPATH/sql/lib/odbc/lib/lib
export DB2INSTANCEPATH DB2INSTANCE LIBPATH
```

where `INSTHOME` is the environment variable that you defined in step 3, and `inst1` is the instance name.

For more information about setting environment variables for the IBM DB2 driver, see IBM documentation.

---

## Linking SQL Interface to Your ODBC Driver on UNIX

You have done the following:

- Installed and configured your RDBMS. See “Setting Up Your RDBMS before You Install SQL Interface” on page 12-2.
- Configured your UNIX library path. See “Setting Your Library Path on UNIX before You Install SQL Interface” on page 12-3.
- Installed SQL Interface. See “Installing SQL Interface on UNIX” on page 12-7.
- Set the environment for your UNIX platform, and the ODBC driver you chose during installation. See “Before You Link SQL Interface to Your INTERSOLV ODBC Driver on UNIX” on page 12-8.

You are ready to link SQL Interface to your ODBC driver by running `inst-sql.sh`.

`essinst`, or `setup.sh` (which runs `essinst`), places `inst-sql.sh` in the `$ARBORPATH` directory. The default is `/home/essbase`. Running `inst-sql.sh` ensures that server processes can access the software necessary for SQL Interface.

`inst-sql.sh` uses the `odbc.ini`, `odbcinst.ini`, and `template` (extension `.tmpl`) files in the `$ARBORPATH/setup` directory to create a set of files that point Essbase to the correct driver product.

The script handles the following for you:

- Ensures root privileges are not accidentally granted to a user-level script.
- Checks for the availability of the Essbase server.
- Checks for the availability to the Essbase server of supported database systems.
- Provides default environment extensions as shell files in the `$ARBORPATH/bin` directory.
- Provides initialization files in the `$ARBORPATH/bin` directory for access by the driver software.
- Creates and dynamically compiles an extra library if needed.

To run `inst-sql.sh`, do the following:

1. As user `arbor`, enter the following command:

```
sh inst-sql.sh
```

2. Supply information when the script prompts you for it.  
When the script finishes, the command prompt appears.

3. Enter the following command:

```
exit
```

---

## After You Link SQL Interface to Your ODBC Driver on UNIX

You have linked SQL Interface to your ODBC driver by running `inst-sql.sh`. See “Linking SQL Interface to Your ODBC Driver on UNIX” on page 12-12.

You are ready to do the following:

- Make Essbase environment variables available to your current shell environment.
- Bind files for the INTERSOLV DB2 driver on AIX or Solaris.
- Set up the `.odbcinst.ini` and `.odbc.ini` files for the IBM DB2 driver on AIX.

---

### ***Making Essbase Environment Variables Available to Your Shell Environment***

`inst-sql.sh` generates the following files:

- `odbc.csh` for the C shell
- `odbc.sh` for the Bourne and Korn shell.

These files contain commands that specify the correct environment variables for Essbase.

To make these Essbase environment variables available to your current shell environment, after you run `inst-sql.sh`, do one of the following:

- In the C shell, use the `source` command against `odbc.csh` in the `.login` or `.cshrc` file.
- In the Bourne or Korn shell, use the `source` command against `odbc.sh` (period) in the `.profile` file.

For example, add the following statement to your `.login` or `.cshrc` file:

```
% source $ARBORPATH\setup\odbc.csh
```

To change the environment settings, edit `odbc.csh` or `odbc.sh`. It is in the `$ARBORPATH/setup` directory.

---

### ***Binding Files for the INTERSOLV DB2 driver on AIX or Solaris***

To bind files so the DB2 driver can understand the INTERSOLV commands on AIX or Solaris, after you run `inst-sql.sh`, complete the following:

1. Create a `bnd` subdirectory in `$DB2INSTANCEPATH`.
2. Change to the `sql1lib/bnd` directory.
3. Copy any files with the extension `bnd` from `$ARBORPATH/bin` into the `$DB2INSTANCEPATH/sql1lib/bnd` directory that you created in steps 1 and 2. For example:

```
# cd /$DB2INSTANCEPATH/sql1lib/bnd
# cp $ARBORPATH/bin/*.bnd
```

4. Make sure you are in the `$INSTHOME` directory, and bind the files. The basic syntax is as follows:

```
db2 bind FILENAME.BND DATABASENAME
```

For example:

```
db2 bind QERRV1.BND SAMPLE
```

You need to bind the following files:

```
QECSV1.BND
QECSWHV1.BND
QERRV1.BND
QERRWHV1.BND
QEURV1.BND
QEURWHV1.BND
```

Names may change for new driver versions. For the files you need to bind, list all files with the `bnd` extension in the `$ARBORPATH/bin` directory.

5. Grant user privileges for accessing data.

For more information about binding and granting privileges, see the *INTER SOLV DataDirect Connect ODBC Reference*.



---

### **Setting Up `.odbcinst.ini` and `.odbc.ini` for the IBM DB2 Driver on AIX**

To set up your `.odbcinst.ini` and `.odbc.ini` files for DB2 Version 2 on AIX, after you run `inst-sql.sh`, do the following:

**Note:**

On AIX, `inst-sql.sh` prompts you to choose between the INTERSOLV DB2 driver and the IBM Call-Level Interface (CLI) for DB2 driver. `inst-sql.sh` links SQL Interface to different libraries depending on which DB2 driver you choose. If you want to switch DB2 drivers sets after you run `inst-sql.sh`, re-install SQL Interface.

1. Copy your `odbcinst.ini` and `odbc.ini` files from the directory where you installed DB2 on AIX into the `$ARBORPATH` directory.
2. Rename them `.odbcinst.ini` and `.odbc.ini` (with periods in front of the file names).
3. Modify them to include the correct driver and data source names. Use the same path and file name to identify the driver in both files. See the examples below.

Here is an example of a `.odbcinst.ini` file:

```
[ODBC Data Sources]
Driver=/home/inst1/sqllib/lib/db2.o
```

Here is an example of a `.odbc.ini` file:

```
[ODBC Data Sources]
Driver=/home/inst1/sqllib/lib/db2.o

[SAMPLE]
Driver=/home/inst1/sqllib/lib/db2.o

[ODBC]
Trace=0
TraceFile=odbctrace.out
InstallDir=/home/inst1/sqllib/odbccli
```

In these examples, `/home/inst1` is the `$INSTHOME` directory. You cannot use variables in `.ini` files.

For more information on instances and other IBM-specific details, see the IBM manual, *DATABASE 2—Installing and Using AIX Clients*. See your IBM representative for the latest ordering information.

---

## Chapter 13

# Using and Configuring Personal Essbase

Personal Essbase provides the ability to install both the Essbase server and Essbase clients on a single Windows NT workstation or Windows 95 or Windows 98 machine. It is a *one-port license* with its own license number. You can configure your machine so that communication between the client and server is fast and does not require a network card.

Read this chapter to learn how to configure your system, using Microsoft Loopback to bypass the network and run the Hyperion Essbase OLAP Server and clients on the same machine.

**Note:** When installing on a Personal Essbase machine (either Windows NT, Windows 95 or Windows 98), you should install new versions of both the 5.0.2 client and 5.0.2 server. A 5.0 client/5.0.2 server configuration is not recommended. A 5.0.1 client will work with a 5.0.2 server, but it will not reflect improvements made since Version 5.0.1.

This chapter contains the following sections:

- “Personal Essbase Components” on page 13-2
- “Personal Essbase License” on page 13-2
- “Limitations of the Personal Essbase Server” on page 13-2
- “Essbase Client Support Under Windows NT, Windows 95, and Windows 98” on page 13-3
- “Configuring Windows NT Communication” on page 13-3
- “Configuring Windows 95 or Windows 98 Communication” on page 13-14

See Chapter 3, Windows NT Server Installation, or Chapter 4, Personal Essbase Installation, for minimal system requirements, and to learn how to install, update your environment for, and start Personal Essbase on Windows NT, Windows 95, or Windows 98.

---

## Personal Essbase Components

A basic Personal Essbase installation includes the following:

- Hyperion Essbase OLAP Server for Windows NT, Windows 95, or Windows 98 (including ESSCMD)
- Hyperion Essbase Application Manager, including ESSCMD
- Hyperion Essbase Spreadsheet Add-in for your 32-bit platform: Excel 95, Excel 97, 1-2-3 97, or 1-2-3 Release 9

---

## Personal Essbase License

Your Personal Essbase license allows only your Personal Essbase clients to connect to your Personal Essbase server. However, your Personal Essbase clients may also connect to other Essbase servers on the network. See Chapter 1, Product Components and Software Registration, for more information on Essbase licenses.

---

## Limitations of the Personal Essbase Server

Personal Essbase for Windows 95 and Windows 98, although having functionality similar to Essbase, does have some restrictions on its use:

- Only one application and two databases are allowed to run simultaneously. A system running more than this configuration is not recommended and is not supported.
- Disk volumes are not supported. Your database must fully reside on the same disk containing the Essbase server software.
- SQL Interface is not supported.
- Only one port with a local connection (client and server on the same machine) is allowed.

## Essbase Client Support Under Windows NT, Windows 95, and Windows 98

The following table shows the clients that are qualified with Personal Essbase under Windows NT, Windows 95, or Windows 98, and the type of operating system they are intended to work on:

**Table 13-1, Qualified Personal Essbase Client Support**

Essbase Client Support	Operating System
Application Manager	32-bit
Spreadsheet Add-in for Excel	32-bit
Spreadsheet Add-in for 1-2-3	32-bit
SQL Drill-Through (Client)	32-bit (Windows NT only)

## Configuring Windows NT Communication

Normally, the Essbase client communicates through the network communications layer (TCP or Named Pipes), network driver, and network to the Essbase server as follows.

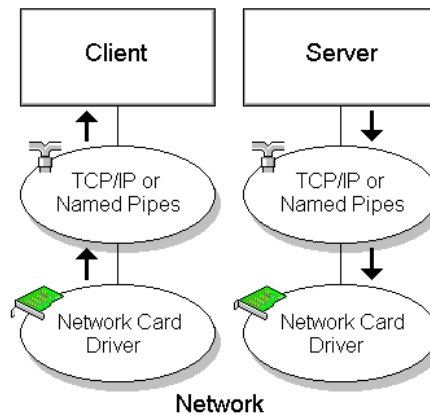


Figure 13-1, Client/Server Communicating through the Network

An alternate way to communicate from the client to the server on the same machine is to use the Microsoft Loopback driver to bypass the network. You can use this method whether or not you have a network card and driver installed.

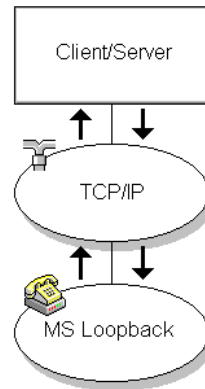


Figure 13-2. Client/Server Bypassing the Network Using MS Loopback

## Setting Up Microsoft Loopback for Windows NT 3.51

On your Windows NT Workstation, do the following:

1. Start the Control Panel.
2. Double-click the Network icon.

The **Network Settings** dialog box appears.

3. Note the current settings in the Installed Adapter Cards and Installed **Network Software** list boxes. If **MS Loopback Adapter Driver** is not an option in these boxes, do the following additional steps:

- a. Click **Add Adapter**.

The **Add Network Adapter** dialog box appears:

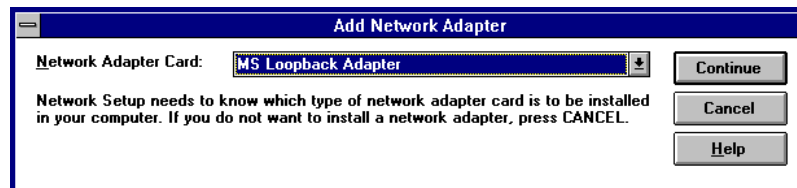


Figure 13-3. Selecting MS Loopback Adapter

- b. Select MS Loopback Adapter from the Network Adapter Card list box.
- c. Click **Continue**.
- d. If you are prompted for settings such as Frame Type, accept the defaults by clicking **OK**. This setting occurs only if you also have IPX/SPX installed. IPX/SPX is *not* required for Personal Essbase.
- e. Windows NT prompts you to enter the drive and directory for the installation files.
- f. If you already have a network adapter in the **Installed Adapter Cards** list, Windows NT detects which protocol to use. Otherwise, Windows NT prompts you to specify the protocol:
  - NetBEUI
  - TCP/IP
  - IPX/SPX

If you use TCP/IP with Essbase, choose **TCP/IP** and click **OK**.

If you use Named Pipes with Essbase, choose **NetBEUI** and click **OK**.

**Note:**

You can use both TCP/IP and NetBEUI, if you wish.

The **Network Settings** dialog box reappears. MS Loopback appears in the **Installed Network Software** and **Installed Adapter Cards** list boxes. The **Installed Network Software** list box also displays TCP/IP or NetBEUI.

After the MS Loopback software is installed, you need to configure your system further, based on the network protocol you use with Essbase. You must now configure the protocol(s) you chose.

---

### ***Configuring MS Loopback with Named Pipes (Windows NT 3.51)***

If you use Named Pipes, do the following steps from the **Network Settings** dialog box:

1. Note the current settings in the **Installed Network Software** list box.
2. If **NetBEUI** protocol is not an option, click **Add Software**.
3. When prompted, choose **NetBEUI** protocol from the list. Follow the prompts and provide the information requested. Click **OK** to complete the installation.
4. Click **OK** to close the **Network Settings** dialog box. When prompted, restart Windows NT.

**Note:**

On a Named Pipes system, your Personal Essbase system runs faster if you specify the server name **LOCAL** instead of the Essbase server name you normally use.

---

## Configuring MS Loopback with TCP/IP (Windows NT 3.51)

If you use TCP/IP, do the following steps from the **Network Settings** dialog box:

1. In the **Installed Network Software** list box, select **TCP/IP Protocol**.
2. Click **Configure**.

The **TCP/IP Configuration** dialog box appears:

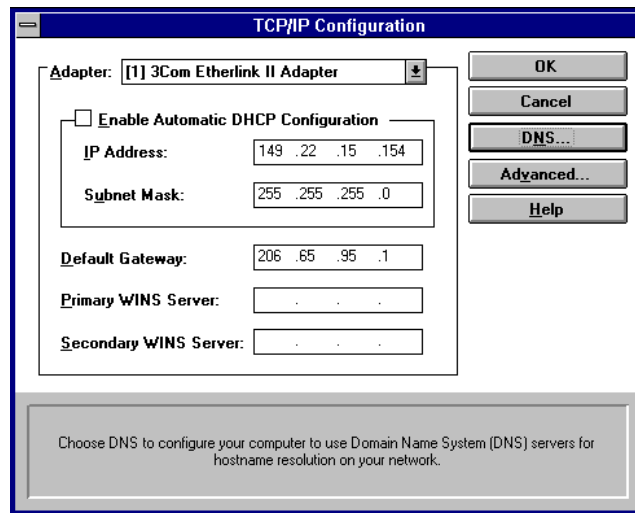


Figure 13-4, Configuring a Network Adapter Card

3. If you use a network card:
  - a. Choose the network adapter name from the **Adapter** list.
  - b. Enter the **IP Address** and **Subnet Mask** and **Default Gateway**. If these options are already filled in, simply note this information. If you don't know this information, contact your company's network administrator.
  - c. Click the **DNS** button.

The **DNS Configuration** dialog box appears.

- d. Fill in the **Host Name**, **Domain Name**, and **Domain Name Service (DNS) Search Order** for your site. See your network administrator for the correct addresses.
- e. Click **OK**.

The **TCP/IP Configuration** dialog box appears again.

4. Select MS Loopback Adapter from the **Adapter** list box.

**Note:**

If the **Adapter** list box is not refreshed to show MS Loopback Adapter, you might need to return to the **Network Settings** dialog box. Click **OK** to accept the network changes and restart the machine. Windows NT then prompts you to configure the MS Loopback Adapter under TCP/IP.

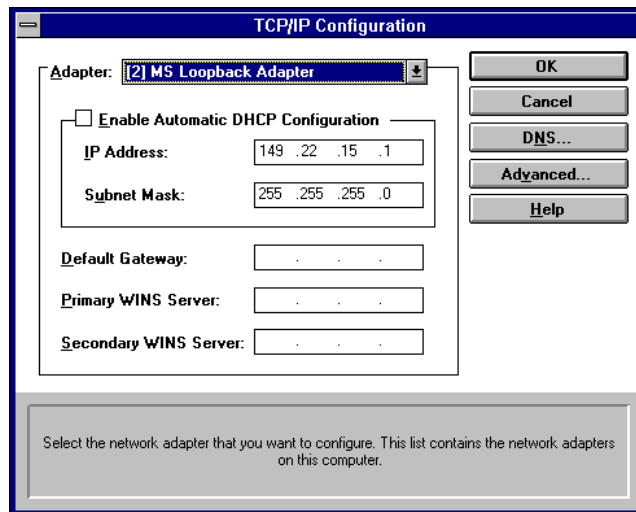


Figure 13-5, Configuring MS Loopback Adapter

5. Enter the **IP Address** and **Subnet Mask**.

The MS Loopback Adapter has a default IP Address. You may give it a fictitious IP address, or the IP address of your machine, but its IP address must be different than the IP address for the network adapter. The **Subnet Mask** for MS Loopback is the same as for the network adapter, if you have one. See your network administrator for the correct addresses.

6. Click **OK**.

The **Network Settings** dialog box appears.

7. Click **OK** to close the **Network Settings** dialog box. When prompted, restart Windows NT.



---

## Setting Up Microsoft Loopback for Windows NT 4.0

Before you start, make sure you have either TCP/IP or Named Pipes (NetBEUI) installed as a protocol on your Windows NT Workstation. Then, do the following:

1. Choose Start | Settings | Control Panel.

2. Double-click the **Network** icon.

The **Network** dialog box appears.

3. Click the **Adapters** tab.

The **Adapters** page of the **Network** dialog box appears.

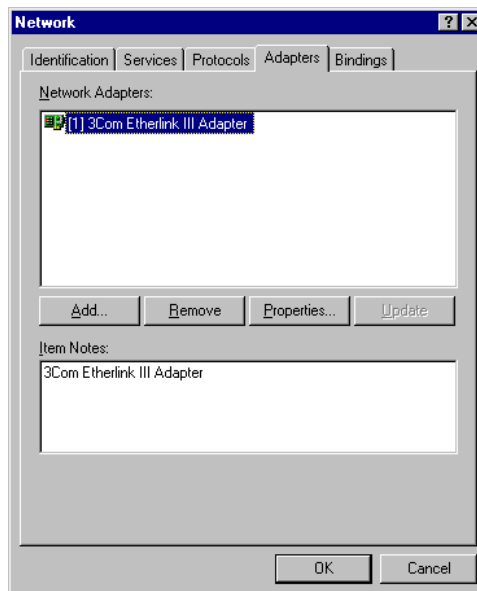


Figure 13-6, Adapters Page of the Network Dialog Box

4. If the **Network Adapter** list box does not contain MS Loopback Adapter, do the following:
  - a. Click **Add**.

The **Select Network Adapter** dialog box appears:

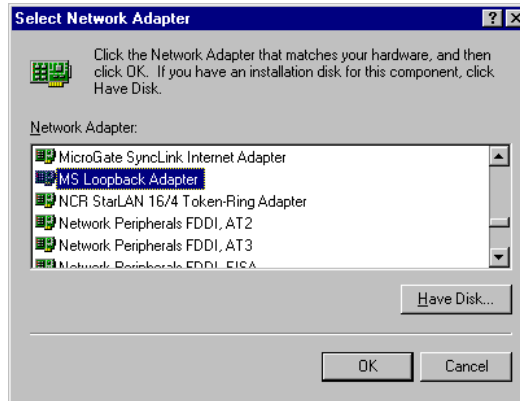


Figure 13-7, Selecting MS Loopback Adapter

- b. Select MS Loopback Adapter in the **Network Adapter** list box.
- c. Click **OK**.
- d. If you are prompted for settings such as **Frame Type**, click **OK** to accept the defaults.

**Note:** These prompts occur if you have IPX/SPX installed. IPX/SPX is NOT required for Personal Essbase.

- e. Windows NT prompts you to insert the “Windows NT Workstation CD-ROM” into the CD-ROM drive. Insert the CD-ROM and click **OK**. MS Loopback Adapter is added to the **Network Adapters** list box in the **Adapters** dialog box.
- f. Click **Close**.
- g. If you use only Named Pipes as a network protocol, Windows NT installs the MS Loopback Adapter and prompts you to reboot your computer so the new settings can take effect. Restart your computer.

If you use TCP/IP, see “Configuring MS Loopback with TCP/IP (Windows NT 4.0)” on page 13-10.

**Note:** On a Named Pipes system, your Personal Essbase system runs faster if you specify the server name LOCAL instead of the Essbase server name you normally use.

---

## Configuring MS Loopback with TCP/IP (Windows NT 4.0)

If you use TCP/IP as a network protocol (either alone or with Named Pipes), do the following steps within the **Microsoft TCP/IP Properties** dialog box:

1. Click the **IP Address** tab, if it is not already active.

The **IP Address** page of the **Microsoft TCP/IP Properties** dialog box appears.

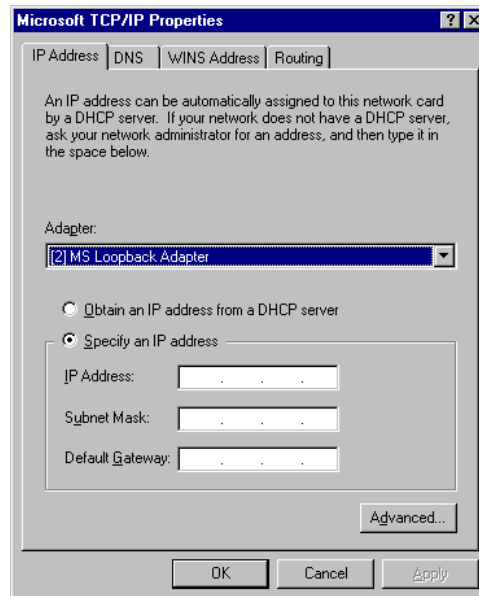


Figure 13-8, Selecting MS Loopback Adapter

2. Select **MS Loopback Adapter** from the **Adapter** list box.
3. Enter the **IP Address** and **Subnet Mask** for the MS Loopback Adapter.

**Note:**

The MS Loopback Adapter has a default IP address. You may give it a fictitious IP address, or the IP address of your machine, but its IP address must be different than the IP address for the network adapter. The subnet mask for MS Loopback is the same as for the network adapter, if you have one. See your network administrator for the correct addresses.

4. Click the **DNS** tab.

The **DNS** page of the **Microsoft TCP/IP Properties** dialog box appears:

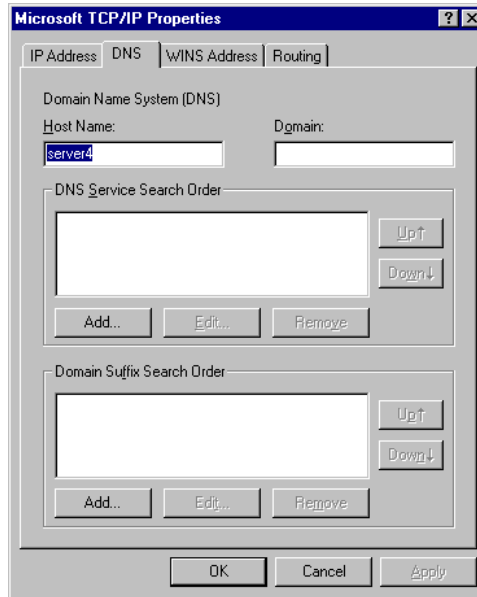


Figure 13-9, Microsoft TCP/IP Properties Dialog Box

5. Fill in the **Host Name**, **Domain**, and **DNS Service Search Order** for the MS Loopback Adapter. Contact your network administrator for the correct information.
6. Click **Add**.
7. Click **OK**.
8. Windows NT installs the MS Loopback Adapter and prompts you to reboot your computer so the new settings can take effect. Restart your computer.

---

## Adding the MS Loopback IP Address to Your HOSTS File

After you have added an IP address for the MS Loopback Adapter (in either Windows NT 3.51 or Windows NT 4.0), you can optionally add this IP address to your local HOSTS file. You can assign the IP address to a name, such as `LOCALLOOP`, and then use this name as your Essbase server name.

1. Using a text editor on your Windows NT machine, open the HOSTS file:

```
C:\WINNT\SYSTEM32\DRIVERS\ETC\HOSTS
```

where `C:\WINNT` is the name of the Windows NT root directory for Windows.

2. Add a line that maps the IP address of the MS Loopback Adapter to a name. For example, if the IP address of the MS Loopback Adapter is `149.22.15.1`, you can map it to `LOCALLOOP` as follows:

```
149.22.15.1 LOCALLOOP
```

**Note:** Names in the HOSTS file are case-sensitive.

3. Start Essbase by running `ESSBASE.EXE`.
4. To connect to the Personal Essbase server, enter `LOCALLOOP` as the server name as follows:

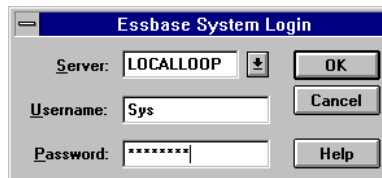


Figure 13-10, Entering the Server Name LOCALLOOP

`LOCALLOOP` is the name you mapped to the MS Loopback Adapter's IP address.

## Connecting to Your Windows NT Personal Essbase Server

Now that you have configured your system for MS Loopback, you are ready to use the Spreadsheet Add-in or Application Manager to connect to the Essbase server. You have several choices of server names to use when connecting.

If you use Named Pipes, use one of the following as the Essbase server name:

- LOCAL—using LOCAL is faster than using the computer name.
- The computer name, as defined in the operating system **Network Settings** dialog box. In the example below, the computer name is POPLAR.

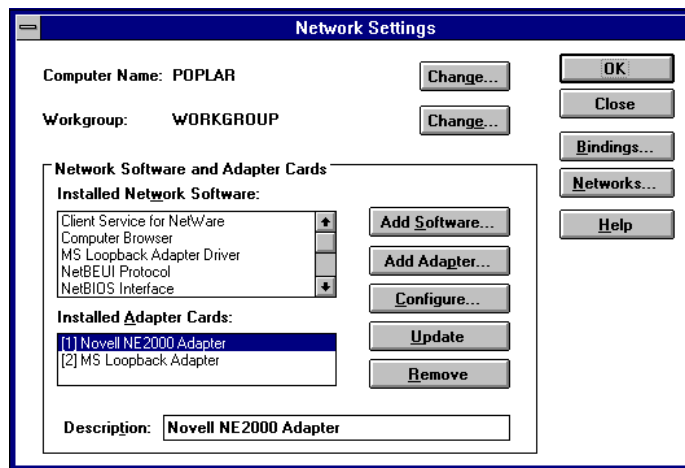


Figure 13-11, Using the Computer Name POPLAR

If you use TCP/IP, use one of the following as the Essbase server name:

- If you mapped the IP address in the HOSTS file, use the name that you mapped to the IP address for the MS Loopback Adapter.

For example, enter LOCALLOOP as the Essbase server name. See “Adding the MS Loopback IP Address to Your HOSTS File” on page 13-12 for information about setting up this user-defined name.

- If you have not mapped the IP address in the HOSTS file, and if you have a network adapter card, use the IP address assigned to your network adapter card.

For example, enter 149 . 22 . 15 . 154 as the Essbase server name. See “Configuring MS Loopback with TCP/IP (Windows NT 3.51)” on page 13-6 or “Configuring MS Loopback with TCP/IP (Windows NT 4.0)” on page 13-10 for how to set up this IP address.

- If you have not mapped the IP address in the HOSTS file, and if you do not have a network adapter card, use the IP address assigned to the MS Loopback Adapter.

For example, enter 149 . 22 . 15 . 1 as the Essbase server name. See “Configuring MS Loopback with TCP/IP (Windows NT 3.51)” on page 13-6 or “Configuring MS Loopback with TCP/IP (Windows NT 4.0)” on page 13-10 for how to set up this IP address.

---

## Configuring Windows 95 or Windows 98 Communication

To communicate between the client and the server on the same Windows 95 or Windows 98 machine, use the Dial-Up Microsoft Loopback method to bypass the network. You can use this method whether or not you have a network card and driver installed.

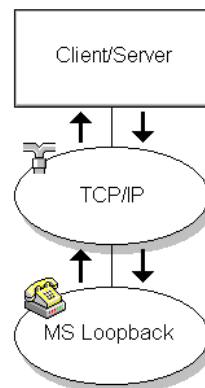


Figure 13-12, Bypassing the Network with Dial-Up MS Loopback

## Configuring Dial-Up Microsoft Loopback for Windows 95 or Windows 98

The following steps assume that:

- TCP/IP and Dial-Up Networking are installed on your machine.
- Your machine does *not* have a network card that is bound to TCP/IP.

**Note:** TCP/IP and Dial-Up Networking are included with your Windows 95 or Windows 98 installation. However, you might have to re-run the installation to choose the TCP/IP and Dial-Up Networking options.

If your machine has a network card installed, complete steps 1 to 3, to verify the network card is bound to TCP/IP. See step 3 for more information.

To set up the Dial-Up loopback, do the following on your Windows 95 or Windows 98 machine:

1. Open the Control Panel by choosing Settings | Control Panel from the Start menu.
2. Double-click the **Network** icon, .

The **Network** dialog box appears:

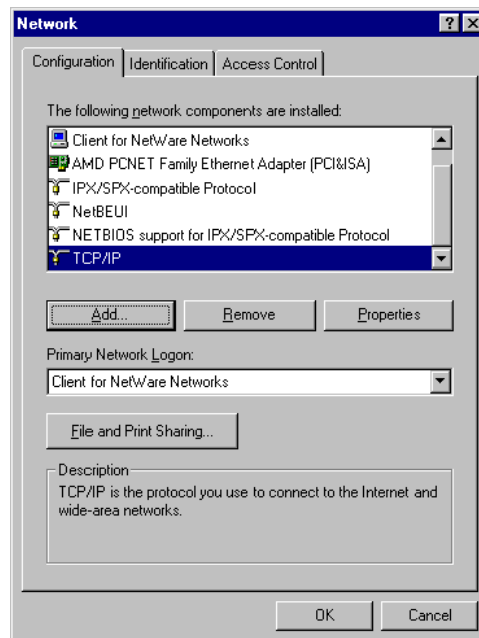


Figure 13-13, Selecting TCP/IP



3. Choose the **Configuration** tab, and select TCP/IP from the list of installed network components.

If TCP/IP is not listed, click **Add**, choose Protocol, click **Add**, and choose Microsoft in the list box on the left, and TCP/IP in the list box on the right.

If your machine has a network card installed, check to see if the network card is bound to TCP/IP. For example, check that the **Network** dialog box has a binding entry similar to:

```
TCP/IP -> AMD PCNET Family Ethernet Adapter (PCI&ISA)
```

If your network card is bound to TCP/IP, you do not need to complete the remaining steps in this section. However, you do need to update your HOSTS file. Jump to the section “Adding the MS Loopback IP Address to Your HOSTS File” on page 13-12.

4. Click **Add**.

The **Select Network Component Type** dialog box appears:

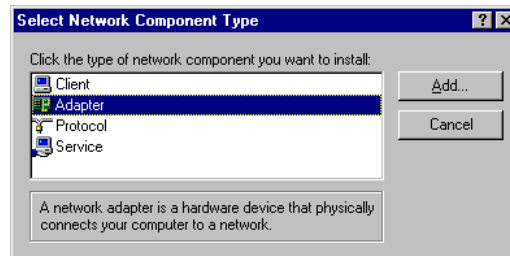


Figure 13-14. Selecting Adapter

5. Select **Adapter**, and click **Add**.

The **Select Network Adapters** dialog box appears:

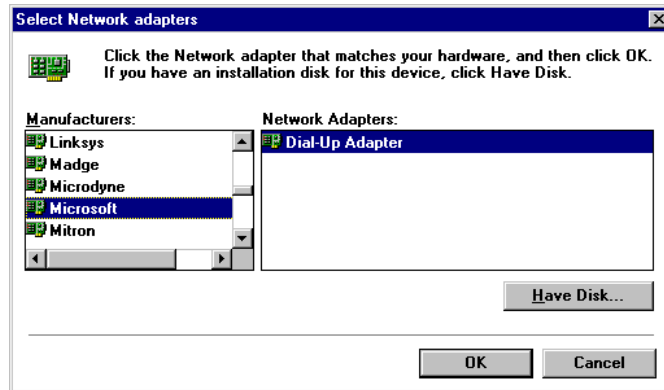


Figure 13-15, Selecting Microsoft Dial-Up Adapter

6. Select the following:
  - In the **Manufacturers** list box, select Microsoft.
  - In the **Network Adapters** list box, select Dial-Up Adapter.
7. Click **OK**.
8. Check that the **Network** dialog box has the binding entry TCP/IP -> Dial-Up Adapter, as follows:

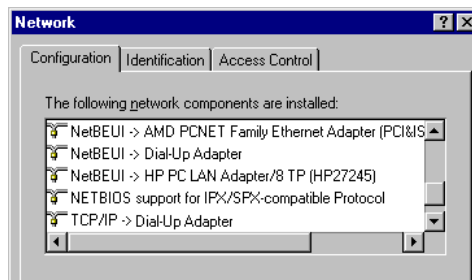


Figure 13-16, Checking for the Binding Entry TCP/IP -> Dial-Up Adapter

9. Click **OK** in the **Network** dialog box.

Windows prompts you to restart your computer to enable the settings. If it is convenient to restart your computer now, click **Yes**.

10. You now need to edit the `HOSTS` file on your machine.

---

### ***Adding an Alias to Your HOSTS File for Windows 95 or Windows 98***

When you first connect Application Manager to Personal Essbase, `LOCALHOST` is assigned as the standard loopback IP address to your local `HOSTS` file. You can also edit the `HOSTS` file and specify an alias name, and use the alias name as your Essbase server name, if desired.

To edit the `HOSTS` file:

1. Exit Essbase.
2. Using a text editor on your Windows 95 or Windows 98 machine, open `\WINDOWS\HOSTS`

**Note:** The `HOSTS` file does not have a file name extension. If the text editor adds an extension to the `HOSTS` file, remove the extension from the file name.

If you do not have a `HOSTS` file, copy the sample file `\WINDOWS\HOSTS.SAM`, edit it, and save it as `\WINDOWS\HOSTS`.

The `HOSTS` file contains the following line:

```
127.0.0.1 localhost
```

3. Change `localhost` to the desired alias name. This will map the name to the default loopback IP address `127.0.0.1`.

```
127.0.0.1 newalias
```

Leave at least one space between the IP address and the alias name.

**Note:** Names in the `HOSTS` file are case-sensitive.

4. Save the changes to the `HOSTS` file.

---

## ***Validating Dial-Up MS Loopback***

You can use the PING command at a DOS prompt to check that the Dial-Up MS Loopback is working correctly. Do the following:

At a DOS prompt, type:

```
PING Name | IP Address
```

where *Name* is the official or alias name that you have mapped to the IP address 127.0.0.1.

For example, type:

```
PING Local
```

or type:

```
PING localhost
```

or type:

```
PING 127.0.0.1
```

You should see a reply similar to the following:

```
Pinging localhost [127.0.0.1] with 32 bytes of data:  
Reply from 127.0.0.1: bytes=32 time<10ms TTL=32  
Reply from 127.0.0.1: bytes=32 time<10ms TTL=32  
Reply from 127.0.0.1: bytes=32 time<10ms TTL=32  
Reply from 127.0.0.1: bytes=32 time<10ms TTL=32
```

---

## Connecting to Your Windows 95 or Windows 98 Personal Essbase Server

Now that you have configured and validated your system for Dial-Up MS Loopback, you are ready to use the Spreadsheet Add-in or Application Manager to connect to the Essbase server. You have several choices of server names to use when connecting:

- The computer name, or alias name, as defined in the HOSTS file. For example, enter `localhost` or `Local` as the Essbase server name.
- The IP address assigned to your loopback as the Essbase server name. For example, enter `127.0.0.1` as the Essbase server name. See “Configuring Dial-Up Microsoft Loopback for Windows 95 or Windows 98” on page 13-15 to set up this IP address.

To connect to the Essbase server, do the following:

1. Restart your Windows 95 or Windows 98 machine to enable the changes to network settings.
2. Restart Essbase by running `ESSBASE.EXE`.
3. In Application Manager, choose `Server | Connect`, and enter the name of your Personal Essbase server. For example, enter `Local` as the server name:

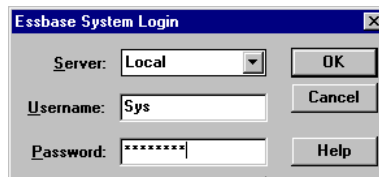


Figure 13-17, Entering Your Personal Essbase Server Name Local

---

# Chapter 14

# Network Configuration Notes

This chapter provides information on the supported TCP/IP and Named Pipes network configurations. It serves as a checklist to help you ensure that the basic elements are installed and running on the client and server machines.

Refer to your network and operating system documentation for detailed information on installing the software and services required to run Hyperion Essbase. Your software provider assumes no liability and does not guarantee the accuracy of this information.

*Note:* For information on Personal Essbase, where you configure both the Hyperion Essbase server and the client on the same machine, see Chapter 13, Using and Configuring Personal Essbase.

This chapter contains the following sections:

- “TCP/IP Support” on page 14-2
- “Named Pipes Support” on page 14-4
- “Novell Using Named Pipes Support” on page 14-5
- “LAN Manager Using Named Pipes Support” on page 14-7

---

## TCP/IP Support

The following protocol stacks are tested and supported with Essbase:

Client Support:

- Microsoft Windows 95 or Windows 98 Native TCP/IP

Server Support:

- Windows NT Native TCP/IP from Microsoft
- Microsoft Windows 95 or Windows 98 Native TCP/IP
- HP-UX Native TCP/IP from Hewlett Packard
- AIX Native TCP/IP from IBM
- Solaris Native TCP/IP from Sun Microsystems

**Note:** Check the conventional memory requirements of these drivers to ensure that you have sufficient memory available.

---

## TCP/IP Protocol Stacks Tested and Supported with Essbase

Client	Server	
	Windows NT Native TCP/IP	Windows 95/98 Native TCP/IP
Windows 95/98 Native TCP/IP	✓	✓

✓ Connectivity is tested and supported with Essbase.

---

## General TCP/IP Installation Procedures

This section provides general steps for installing TCP/IP.

---

### Server

TCP/IP is included with Windows NT. As part of defining the Windows NT machine with TCP/IP protocol, the machine name and IP address are defined during the Windows NT network installation.

TCP/IP is included with Windows 95 and Windows 98. As part of defining the Windows 95 or Windows 98 machine with TCP/IP protocol, the machine name and IP address are defined during the installation.

TCP/IP is included with UNIX. As part of defining the UNIX machine with TCP/IP protocol, the machine name and IP address are defined during the UNIX installation.

---

### Client

To install TCP/IP on a client machine, follow these steps:

1. Install one of the supported protocol stacks.
2. For each server on the network, update the client `HOSTS` file to contain an entry for the server. For example, the following entry would be made for the server `MAPLE` at IP address `198.137.238.10`:

```
198.137.238.10    MAPLE
```

The `HOSTS` file specifies the IP address of the server so the client can communicate with the server. A *host* is any device attached to the network that uses TCP/IP. To receive and deliver packets successfully between hosts, TCP/IP relies on information in the `HOSTS` file.

Different TCP/IP vendors store `HOSTS` files in different locations, and some vendors allow you to change the location. The following list describes the individual requirements for the protocol stacks supported by Essbase:

- **FTP:** In the installation directory, FTP stores the file `PCTCP.INI` in which you specify the location of the `HOSTS` file. To set the location (in this case, to `C:\PCTCP\HOSTS`), add the following line to the `[pctcp kernel]` section of the `.INI` file:

```
host-table=C:\PCTCP\HOSTS
```

If you specified `HOSTS` during installation, this line is added automatically.



---

## Troubleshooting Common Connection Problems

Before attempting an Essbase client-server connection, you should test the protocol installation to ensure the connection is installed properly.

Use the PING command on the server to check that it is running and visible to your PC client. If the PING command is successful but the TELNET command is not, then there may be a problem with the inet daemon. If the PING command is unsuccessful on the server, you might have a routing or hardware problem.

---

## Named Pipes Support

The following protocol stacks are tested and supported with Essbase:

Client Support:

- Microsoft LAN Manager (NetBEUI)
- Microsoft Windows 95/98 Native NetBEUI

Server Support:

- Windows NT Native Named Pipes (NetBEUI)
- Microsoft LAN Manager (NetBEUI)

---

## Named Pipes Protocol Stacks Tested and Supported with Essbase

Client	Windows NT Server
	NetBEUI
Windows 95/98 Native NetBEUI	✓

✓ Connectivity is tested and supported with Essbase.

---

## Novell Using Named Pipes Support

Essbase supports the Named Pipes protocol stack on Novell Netware LANs (local-area networks). Novell currently supports Named Pipes services for PC clients connecting to Windows NT servers, but does not offer support for UNIX servers.

---

### PC Clients

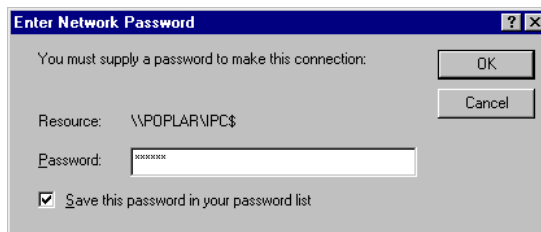
This section contains information on connecting the Windows 95 or Windows 98 PC client to Windows NT servers using Named Pipes.

---

#### ***Connecting from Windows 95 or Windows 98 to Windows NT***

To connect from Windows 95 or Windows 98 to Windows NT using Named Pipes, you might need to connect to the Windows NT machine independently of Essbase before attempting to connect to the Essbase server. To connect to the Windows NT machine:

1. Open Network Neighborhood from your Windows desktop.
2. Locate the server name in the list. Double-click the server name.
3. If prompted, enter the password for the server, then click **OK**.



*Figure 14-1, Entering the Server Password*

4. When you are connected to the server, the server window appears showing one or more directories to which you have access.
5. Close the server window and Network Neighborhood.

Now you are ready to connect to Essbase.

## ***Increasing Connections on Windows 95 or Windows 98***

When connecting from Windows 95 or Windows 98 to Windows NT using Named Pipes, if you see the error message “**Network error: Cannot receive data,**” try increasing the maximum number of connections on your Windows 95 or Windows 98 machine:

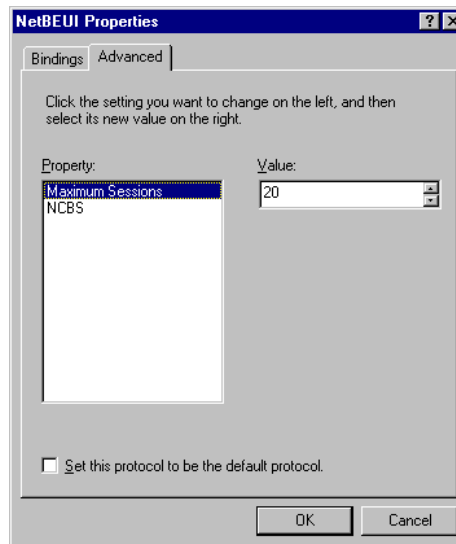
1. Choose Start | Settings | Control Panel.
2. Double-click the Network icon.

The **Network** dialog box appears.

3. In the list box entitled “The following network components are installed,” locate and double-click the option for NetBEUI. If you have more than one option, simply choose one of them.

The **NetBEUI Properties** dialog box appears.

4. Click the **Advanced** tab.
5. Select **Maximum Sessions** in the **Property** list box. Increase the Value of the maximum sessions setting. You may need to experiment with this setting. In the example below, the setting was increased from 10 to 20. When done, click **OK**.



*Figure 14-2, Increasing the Maximum Sessions Value to 20*

6. Click **OK** to close the **Network** dialog box.
7. Close Control Panel. If prompted, reboot your machine.

---

## Windows NT Server

Novell supports Named Pipes service in its IPX protocol environment.

*Note:* The Novell Named Pipes environment does not require the Windows NT server to log in to the file server.

After installing Windows NT, install the NWLINK IPX/SPX driver for Windows NT on the server machine. Select the Network options during installation or configuration of Windows NT, and select NWLINK IPX/SPX.

---

## UNIX Server

Novell does not currently provide Named Pipes requestors for UNIX.

---

## LAN Manager Using Named Pipes Support

Essbase supports the Named Pipes protocol stack on Microsoft LAN Manager LANs. Microsoft currently provides Named Pipes services for PC clients connecting to Windows NT servers, but does not offer support for UNIX servers.

---

## PC Clients

LAN Manager workstations must meet the following requirements:

- Workstations must use LAN Manager 2.0 Enhanced (or above) drivers and have Named Pipes permission.
- Users executing "Net Logon" must attach to the appropriate server machine in the correct domain.

---

## Windows NT Server

LAN Manager support for Named Pipes service under Windows NT is built into Windows NT, using NetBEUI.

---

## UNIX Server

LAN Manager does not support Named Pipes service to UNIX.

---

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