

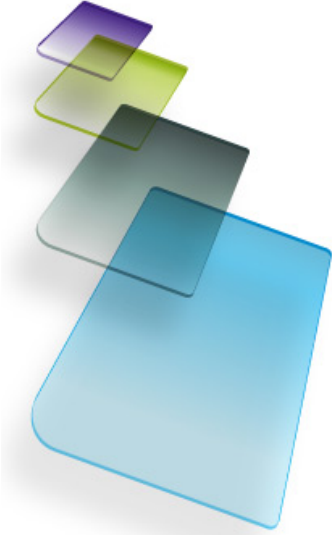
Self-Service Analytics

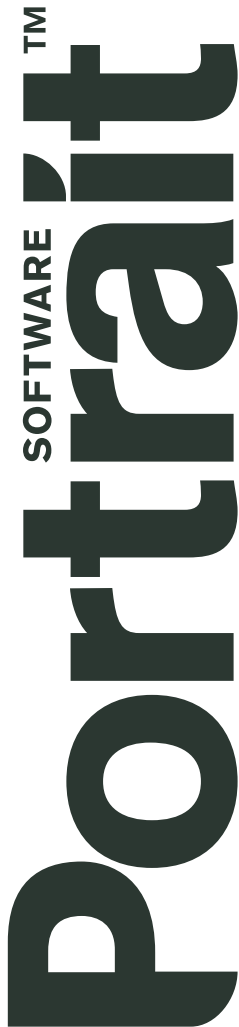
Self-Service Analytics administration

Self-Service Analytics version 2.2A

Issue qpadm-2.2-1

July 12, 2010





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Self-Service Analytics Support

If you need help with something that's not covered by this documentation, try the Knowledge Base on our web site, <http://support.portraitsoftware.com> (follow the links to Self-Service Analytics Support). You can also download updated versions of this and other Self-Service Analytics documentation from the site. If you don't have a username and password—or you've forgotten them—please contact us through one of the channels below.

If you find a problem with the use, installation, or documentation of Self-Service Analytics, please contact us using any of the following methods:

E-mail support@portraitsoftware.com

Phone USA/Canada 1-800-335-3860 (toll-free)
Rest of world +44 131 240 3140

Fax USA/Canada (617)-457-5299
Rest of world +44 131 220 4492

(Please mark your fax for the attention of Self-Service Analytics Support.)

When you report a problem, it helps if you can tell us:

- The circumstances in which the problem arose;
- What error messages you saw (if any);
- The version of the software that you were using.

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Who should read this guide

This guide is for system administrators and others who need to install and maintain Self-Service Analytics. This guide assumes that you have a good understanding of your organization's computer systems and network infrastructure and that you:

- Have root/administrator access to relevant computers.
- Can perform patch installations for operating systems and other software.
- Can create user accounts.

For convenience this guide has been separated into two sections:

- Installing Self-Service Analytics
- Administering Self-Service Analytics

Both of these sections refer to the checklist; the relevant answers given during the installation should be recorded on the checklist to provide a detailed record of the installation process.

Contents

Who should read this guide	iii
1 Installing Self-Service Analytics	1
Prerequisites	1
Installation Checklist	2
Self-Service Analytics 2.2A Installation Checklist	3
Installing the Analytical Web Services component	4
Running the install on Windows	4
Running the install on UNIX	4
The Analytical Web Services installation wizard	4
On UNIX platforms:	10
Installing the Self-Service Analytics Server component	10
Running the install on Windows	10
Running the install on UNIX	11
The Self-Service Analytics Server installation wizard	11
On UNIX	18
Configuring Analytical Web Services and Self-Service Analytics Server	18
Configure and start the services on Windows	18
Starting the Self-Service Analytics daemons on UNIX	19
Basic tests to ensure that the installation is operational	19
Installing the Publishing Components	21
Basic tests to ensure that the publishing components are operational	21
Installing support for browser applets	21
Upgrading Self-Service Analytics from qp2.1B	21
Configuring cron processing	22
Configuring on UNIX	22
Configuring on Windows	23
Verifying that your cron process is running correctly	23
2 Administering Self-Service Analytics	25
Configuring Self-Service Analytics	25
Configure guest access permissions	25
Remove demonstration user logins	25
Configure Private Uploads	25
Add a site specific theme	25
Customize the mission statement	26
Customize the site slogan	26
Create site-specific content	26
Set up default dataset series	26
Configure mailhandler.module POP access	26
Adding metadata validation into the Quadstone System	27
Known Problems	27
Failures running queries after an upgrade installation	27

UNIX uninstallers do not work	27
Internet Explorer scripting security must be enabled	27
Index	29

1: Installing Self-Service Analytics

There are two steps to installing Self-Service Analytics, the first is the Analytical Web Services component and the second is the Self-Service Analytics Server component.

Please ensure that the Analytical Web Services component is installed before installing the Self-Service Analytics Server.

Prerequisites

- Administrator / root username and password for the installation machine.
- A fully installed Quadstone System server version 5.3B. Note the location of QSHOME for the Quadstone System version 5.3B installation that you will be using
- Create a unique user account for use only with Self-Service Analytics (e.g. `qp_admin`).

Installing on Windows This unique Self-Service Analytics account should have the same permissions and rights as a systems administrator account. This new `qp_admin` account should be created by the systems administrator account. This account should then be used to log in to the machine and run the installers.

Installing on UNIX This unique Self-Service Analytics account should be a standard user. This user should also be a member of the primary group containing all the Quadstone System users. Please note that the installers must be run as the **root** user and not this new Self-Service Analytics account; this account is used by the installer during the install.

This user should also have access to foci that could possibly be uploaded to Self-Service Analytics.

- A valid license file for Quadstone System version 5.3B which includes a license key for the Analytical Web Services component.
 - An SMTP server available on the network.
 - 5 unique TCP/IP port numbers that are currently not in use.
To obtain the list of port numbers currently in use, you can use the `netstat -a` command.
 - Print a hardcopy of the following Self-Service Analytics Installation Checklist.
 - If upgrading, ensure any existing **Self-Service Analytics Web Server, Database Server and the Analytical Web Services** services are stopped and if on Windows, set to manual.
-

Installation Checklist

This checklist is referred to throughout the installation guide.

- The relevant answers given during the installation should be recorded on the checklist when the following format is used: **(record in 7)**.
- If the value must be the same as a previous answer, the number of the previous answer will be shown as follows: **(#7)**.

Completing this checklist will ensure a detailed record of all of the information specified during the installation. A completed copy should be sent to [Self-Service Analytics Support, support@portraitsoftware.com](mailto:support@portraitsoftware.com) after the installation.

Self-Service Analytics 2.2A Installation Checklist

	Value
1 Server name	

Quadstone System installation details

2 Install Location (QSHOME)	
3 Quadstone System Port number	

Analytical Web Services

4 UNIX - Install location (QSHOME) (#2)	
5 UNIX - User account to run the daemon	
6 Install Location (QSHOME) (#2)	
7 Password	
8 Hostname	
9 Web Services Port Number	
10 J2EE Container Location	
11 System Services Option - Username	
12 System Services Option - Shutdown Port	
13 Quadstone System Options - Number of Servers	
14 Quadstone System Options - Port Number	
15 Self-Service Analytics URL	
16 UNIX - Post install shell script run	

Portrait Self-Service Analytics

17 UNIX- User account to run the daemon	
18 Install Location	
19 Admin e-mail	
20 Password (#7)	
21 Web Server Options - Hostname	
22 Web Server Options - Port Number	
23 Portal URL	
24 Database Options - Port Number	
25 Upgrade content? From which version?	
26 System Server Options - User name (#11)	
27 System Server Options - Unix group name	
28 Web Services Options - Host name (#8)	
29 Web Services Options - Port Number (#9)	
30 Web Services Options - Install Directory (# 6)	
31 Email Options - serverhost	
32 Email Options - SMTP port	
33 UNIX - Post install shell script run	

Other

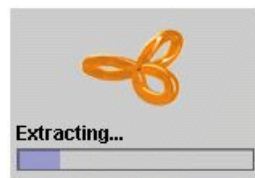
34 Configure cron process	
---------------------------	--

Installing the Analytical Web Services component

Running the install on Windows

Please note that the installers must be run as the new user account created before the installation and that the `QSHOME` environment variable, if set, must be set to the path of the Quadstone System version 5.3B.

Browse to the `ws` directory on the CD. On Windows 2008 it is necessary to run the `webservices-installer.bat` file by right clicking and selecting 'Run as Administrator'. On other platforms simply double-click the `webservices-installer.bat` file, you should then see the following image:



Running the install on UNIX

Please note that the installers must be run as the **root** user.

Browse to the `ws` directory on the CD and run the installer `webservices-installer.sh` file, you should then see the following questions:

1. Please enter the location where the Quadstone System 5.3B server is installed:
(value from (#2) and **record in 4**)
2. Please enter the name of the user account that will run the Quadstone Analytical Web Services daemon:

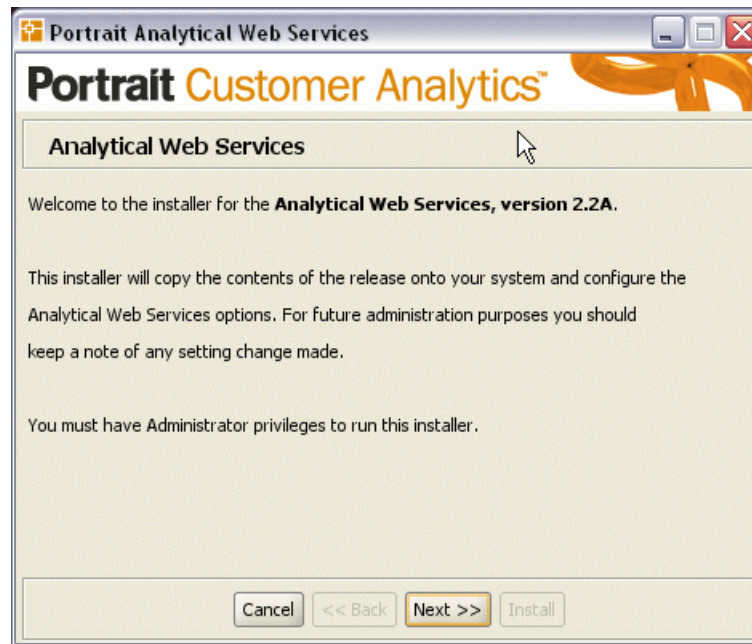
This should be the Self-Service Analytics account created before the installation. (**record in 5**)

The Analytical Web Services installation wizard

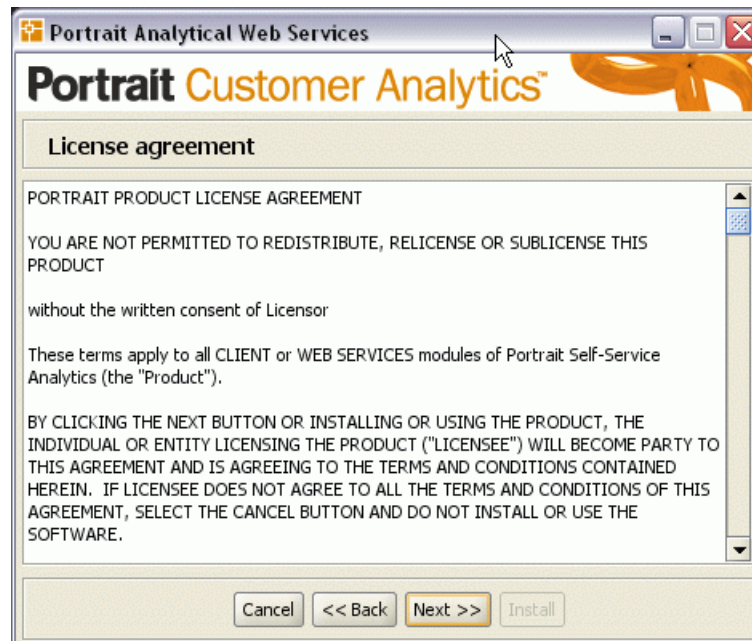
After answering both of these questions the Analytical Web Services installation will load the graphical installer, or a text based installer if you do not have graphical capability, both of which display the same information.

The following screenshots apply to Windows installations; the UNIX installations are extremely similar:

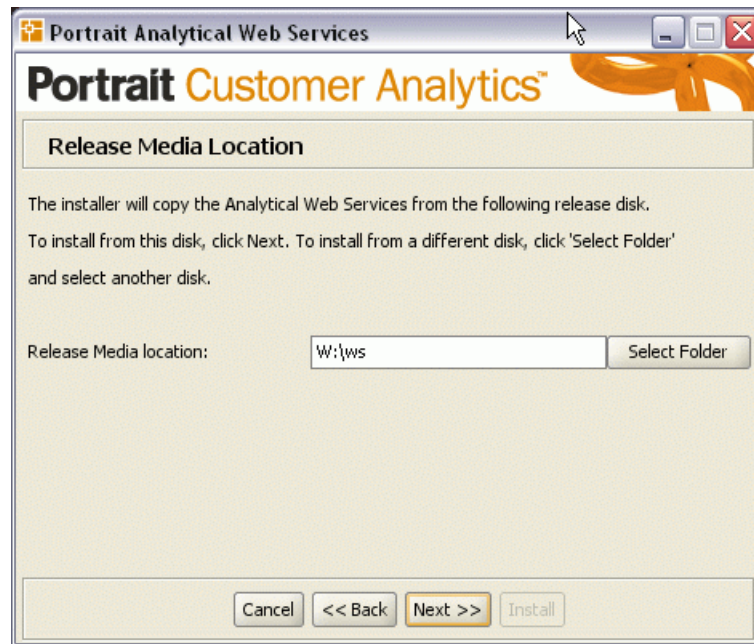
1. The first screen is for information only and reiterates that you must have administrator privileges to continue with the installation.



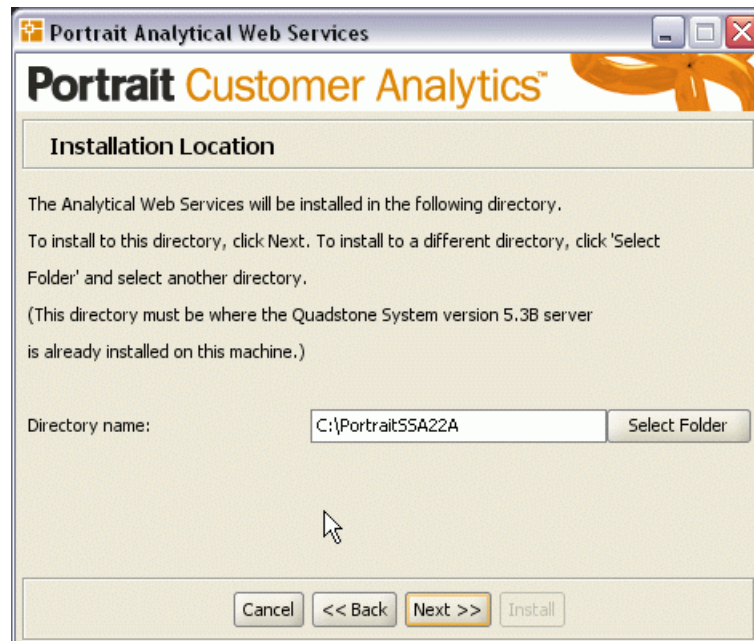
2. This screen details the license agreement of Portrait Self-Service Analytics.



3. Browse to the directory containing the Analytical Web Services installer e.g the location of the CD and then the ws folder.



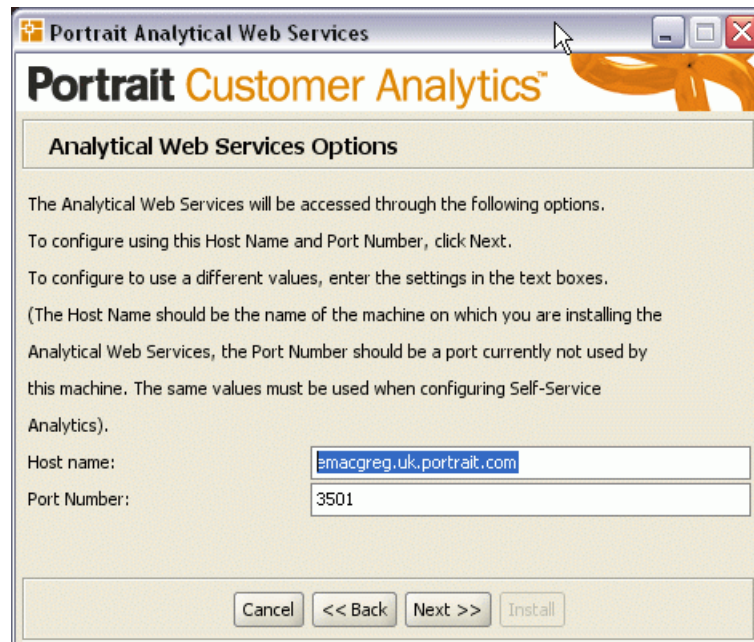
4. Enter the current location of the Quadstone System version 5.3B. (**record in 6**)



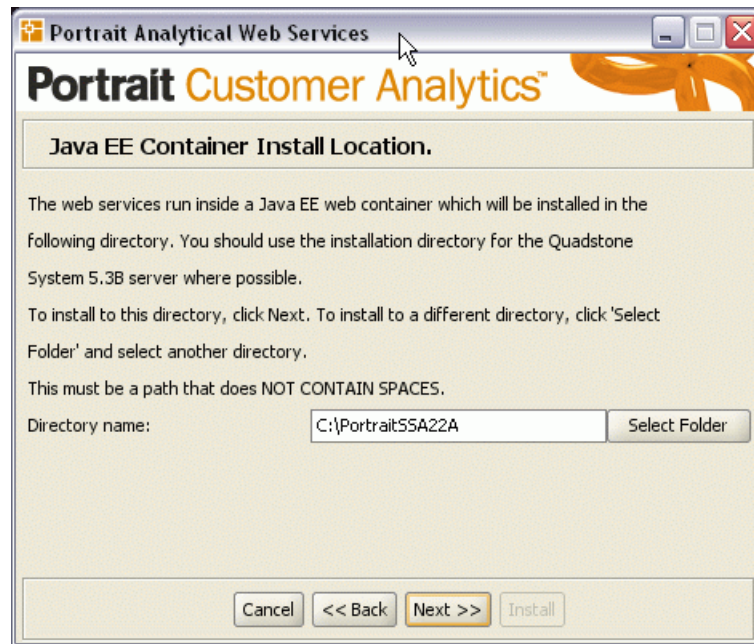
5. Enter a unique password containing only alpha numeric and underscore characters; used only with Self-Service Analytics, this password is also used during the Self-Service Analytics Server installation. Please note that this password must not be the password for the new user created before the installation. (**record in 7**)



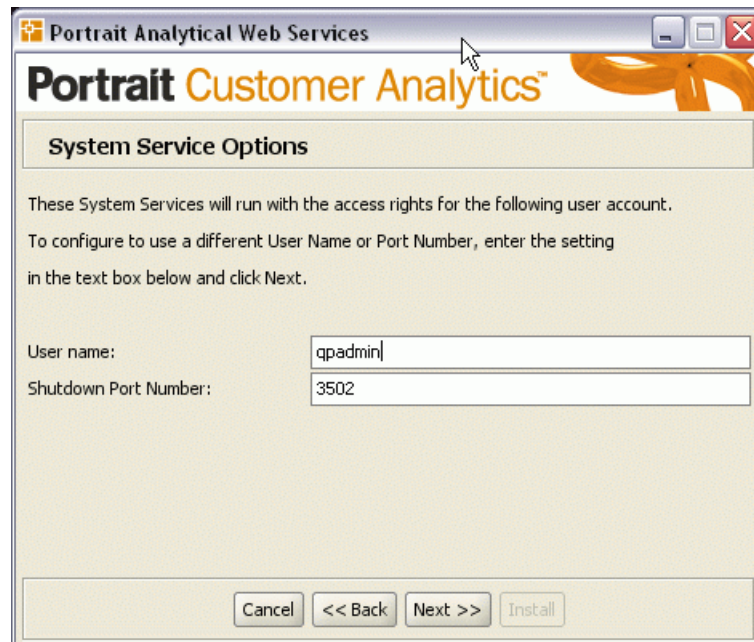
6. The host name should be the name of the machine that you are installing on to (this cannot be localhost). The port number should be any unused port number; the default should be used if available. (record in 8 and 9)



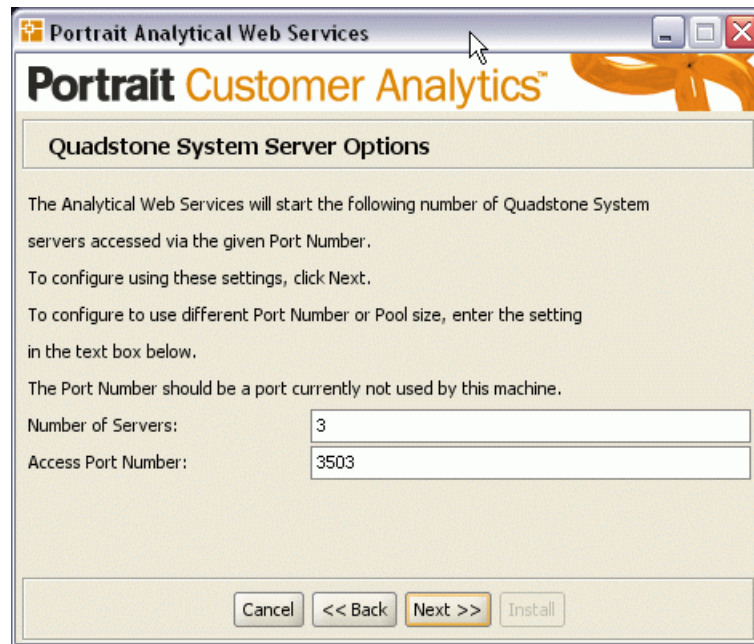
7. This location will usually be the location of QSHOME and **must not contain any spaces** in the path. If this location does contain spaces then another location should be selected. (record in 10)



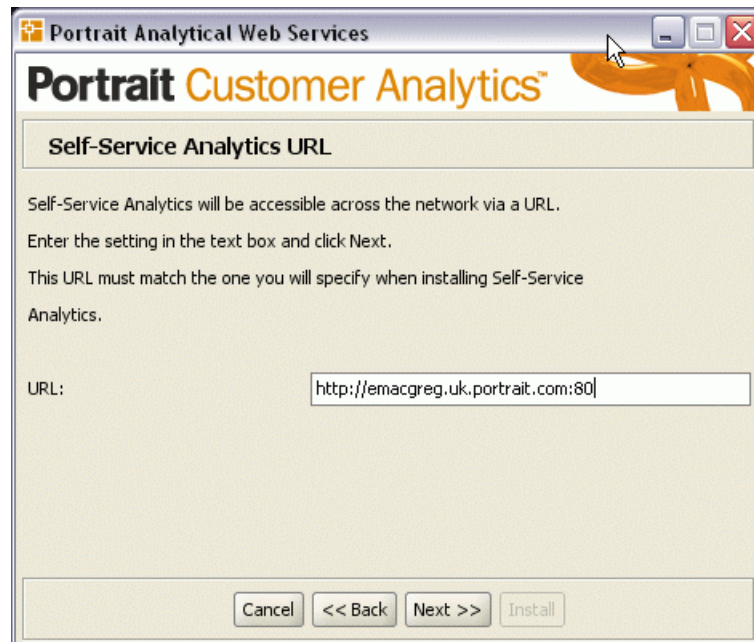
8. The user name should be the username for the Self-Service Analytics account created before the installation. The port number should be any unused port number; the default should be used if available. (record in 11 and 12)



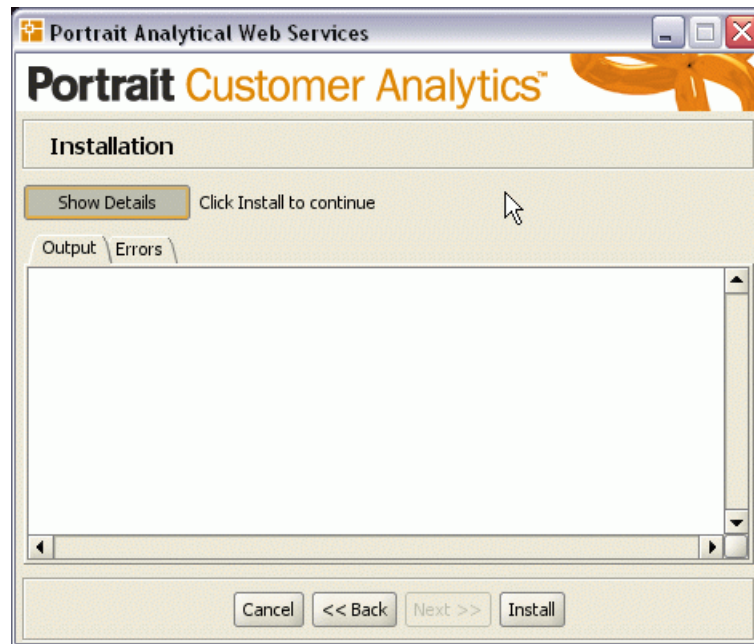
9. The Number of Servers should remain 3; the Access Port Number should again be any unused port. (record in 13 and 14)



10. Enter the URL that will be used to access Self-Service Analytics. (based on the hostname and port number that will be provided in the Self-Service Analytics install, Web server options section) (record in 15)



11. You are now ready to install the Analytical Web Services:



More information about the output and any errors generated can be viewed by clicking on the **Show Details** button. You will receive a message telling you that the installation has finished and you will then be able to view all of the information generated before closing the installer.

On UNIX platforms:

After the Analytical Web Services installation completes successfully the following message will be displayed in the UNIX window:

```
To install the Quadstone Web Services system daemon,  
you must run the $QSHOME/qp2.2A/installer/postinstall-webservices.sh script.
```

Browse to this location and execute the shell script to install the Analytical Web Services system daemon. (**record in 16**)

Installing the Self-Service Analytics Server component

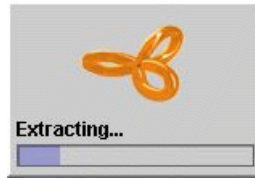
Running the install on Windows

Please note that the installers must be run as the new user account created before the installation. When installing the Self-Service Analytics Server component on the same machine as the Analytical Web Services component the `QSHOME` environment variable, if set, must be set to the path of the Quadstone System version 5.3B.

If you are installing the Self-Service Analytics Server component on a different machine to the Analytical Web Services component, a Java runtime environment (minimum version 1.4) must be available for the installer to run. Please contact support for assistance if required.

Browse to the `portal` directory on the CD. On Windows 2008 it is necessary to run the `portal-installer.bat` file by right clicking and selecting 'Run as Administrator'. On

other platforms simply double-click the `portal-installer.bat` file, you should then see the following image:



Running the install on UNIX

Please note that the installers must be run as the **root** user.

Browse to the `portal` directory on the CD and run the installer `portal-installer.sh` file, you should then see the following question:

Please enter the name of the user account that will run the Self-Service Analytics Server daemons:

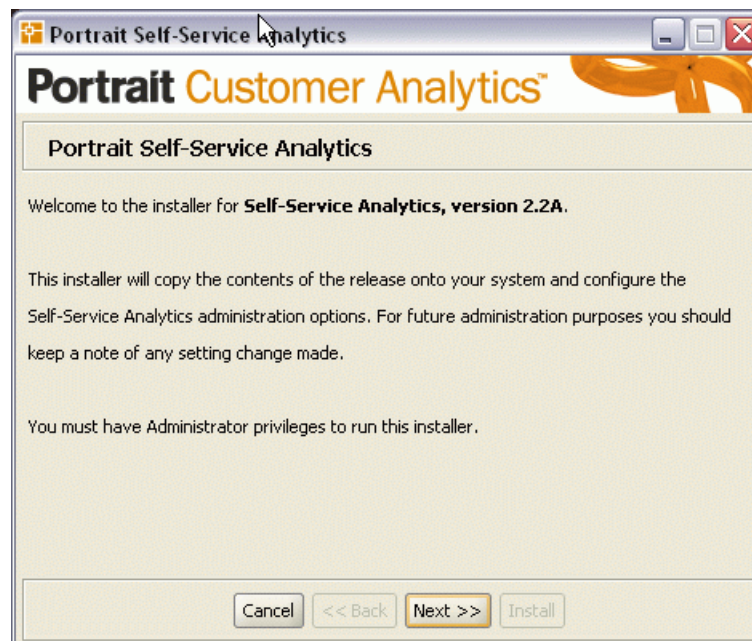
This should be the Self-Service Analytics account created before the installation. (record as 17)

The Self-Service Analytics Server installation wizard

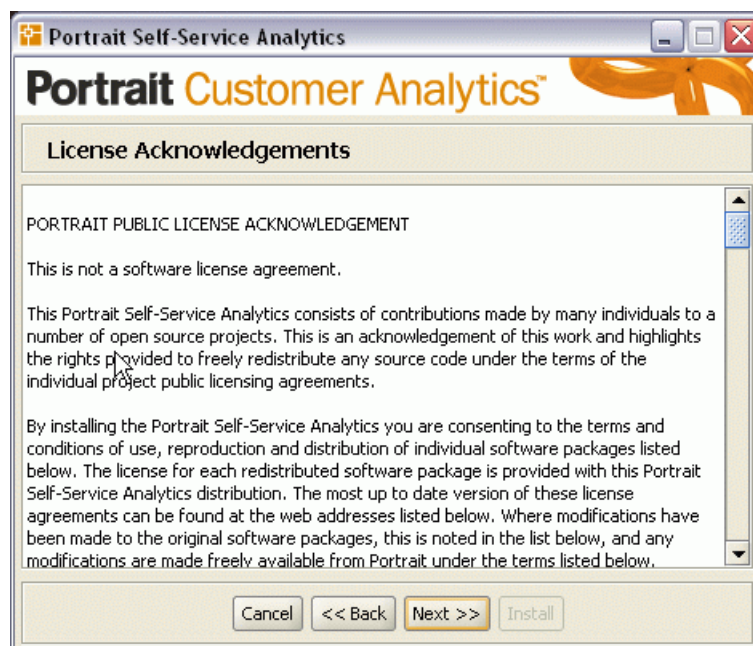
After answering this question the Self-Service Analytics Server installation will load the graphical installer, or a text based installer if you do not have graphical capability, both of which display the same information.

The following screenshots apply to Windows installations; the UNIX installations are extremely similar:

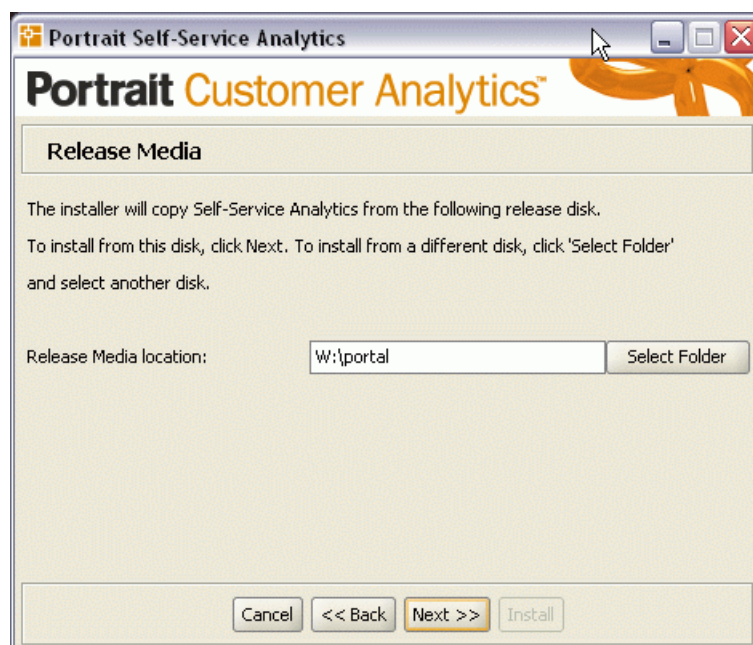
1. The first screen is for information only and reminds you that you must have administrator privileges to continue with the installation.



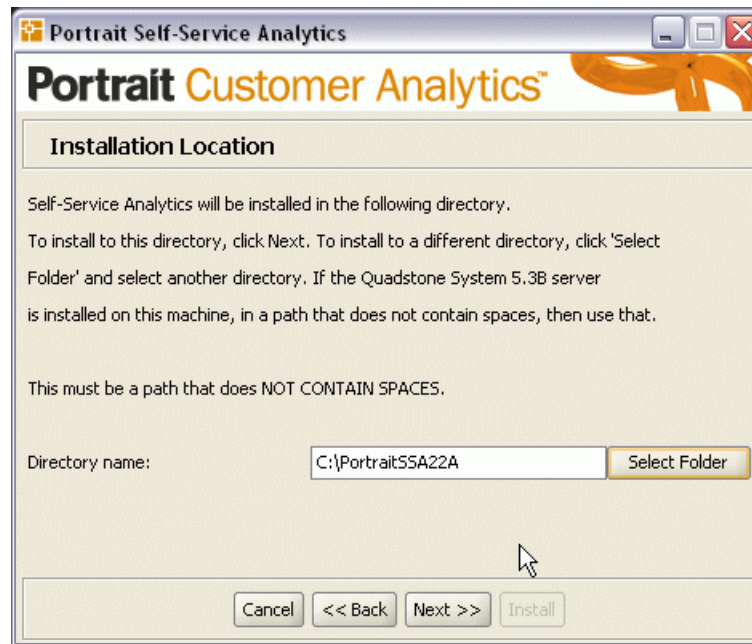
2. This screen details the license agreement for Self-Service Analytics.



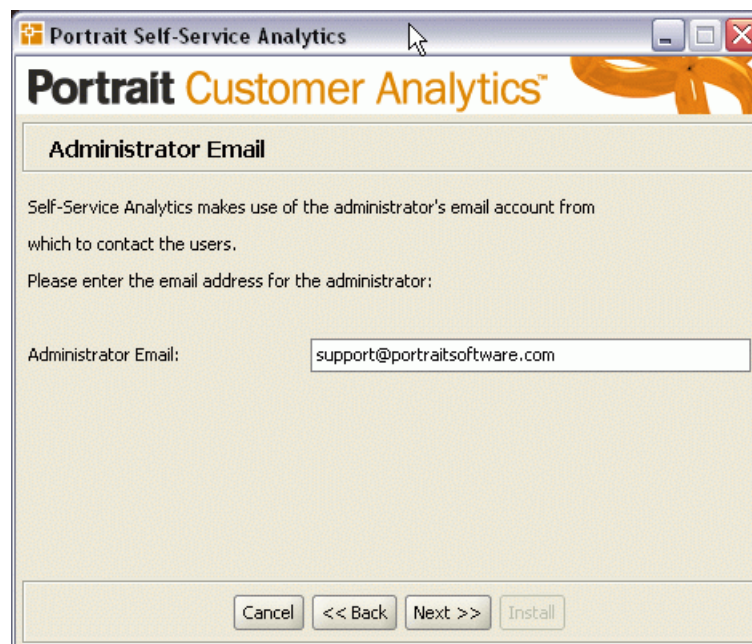
3. Browse to the directory containing the Self-Service Analytics Server installer. e.g the location of the CD and then into the `portal` folder.



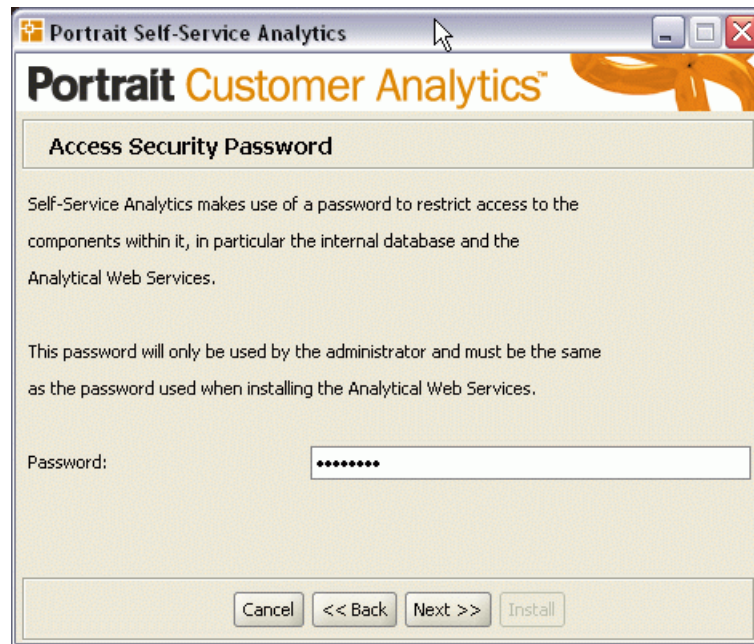
4. If the Self-Service Analytics Server component is being installed on to the same machine as the Analytical Web Services component, enter the path to this installation (**record in 18**) (unless it contains a space in the path, in which case a new location should be chosen). If a different machine is being installed, enter a valid path which does not contain a space.



5. The administrator email should be the account that will be used to contact the Self-Service Analytics users. (**record in 19**)



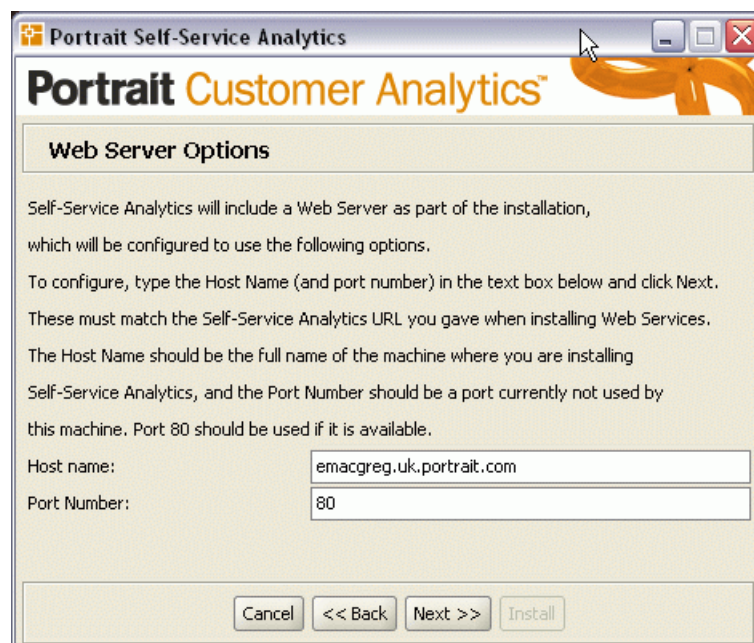
6. The Access security password should be the password used in step 5 of the Analytical Web Services install (**#7**), **record in 20**)



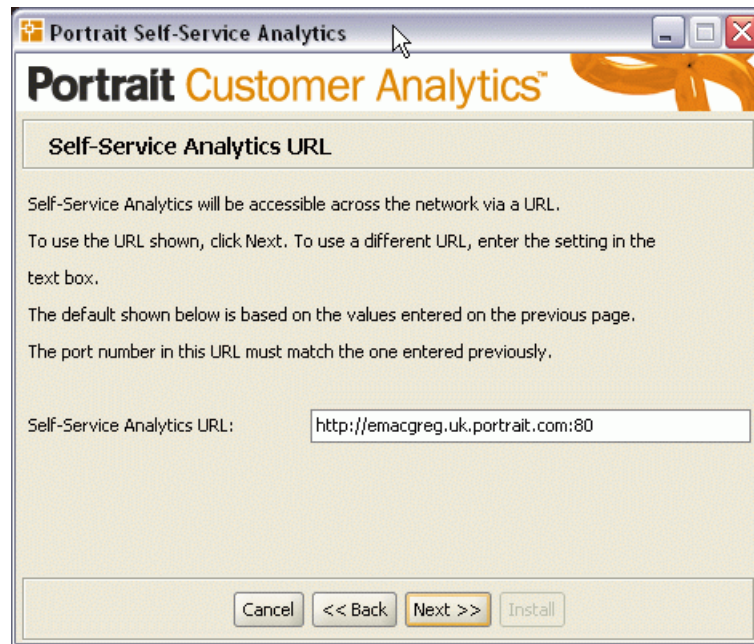
7. The host name should be the fully qualified name of the machine that you are installing on to; the port number should be an unused port number that the web server will listen on. (Ideally a reserved port less than 1024, the default is 80) (**record in 21 and 22**).

To check if port 80 is in use by another web server, browse to `http://<hostname>:80` in Internet Explorer.

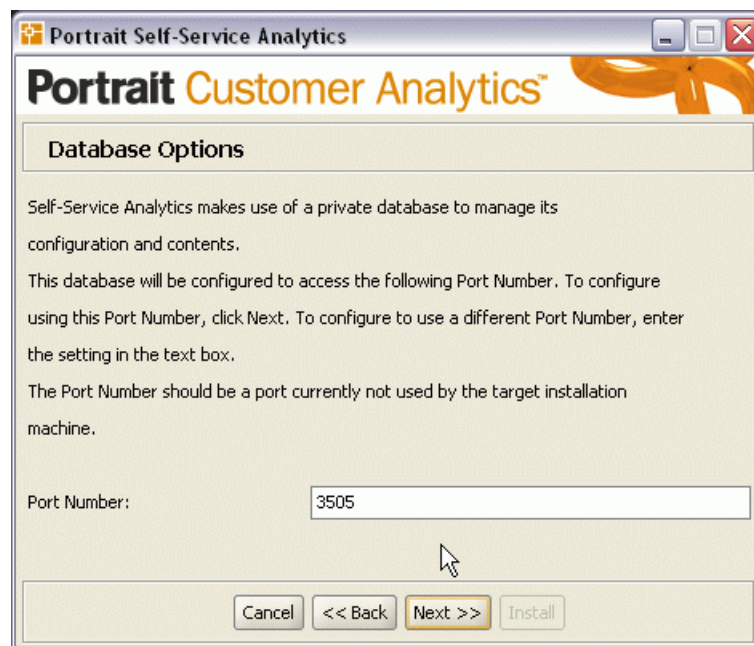
DNS aliases can be setup to ensure a more user-friendly Self-Service Analytics URL.



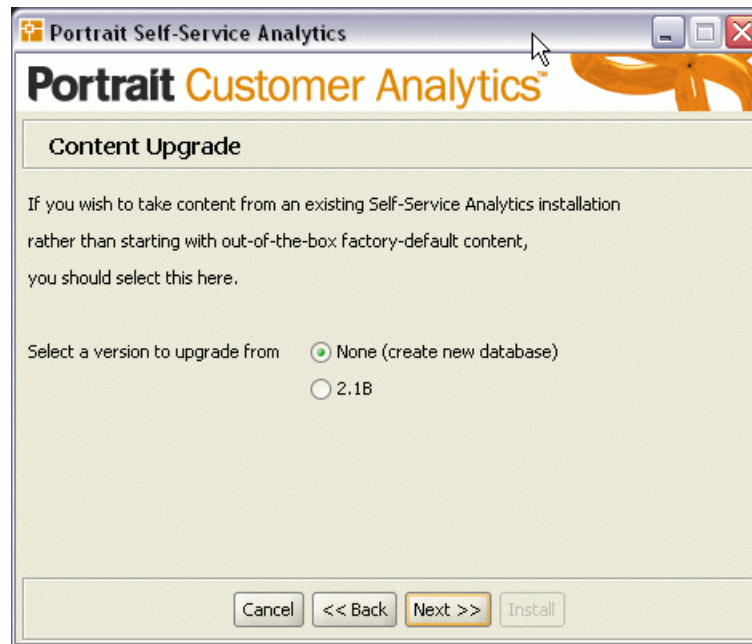
8. This information is populated from the previous information in step 7. (**record in 23**)



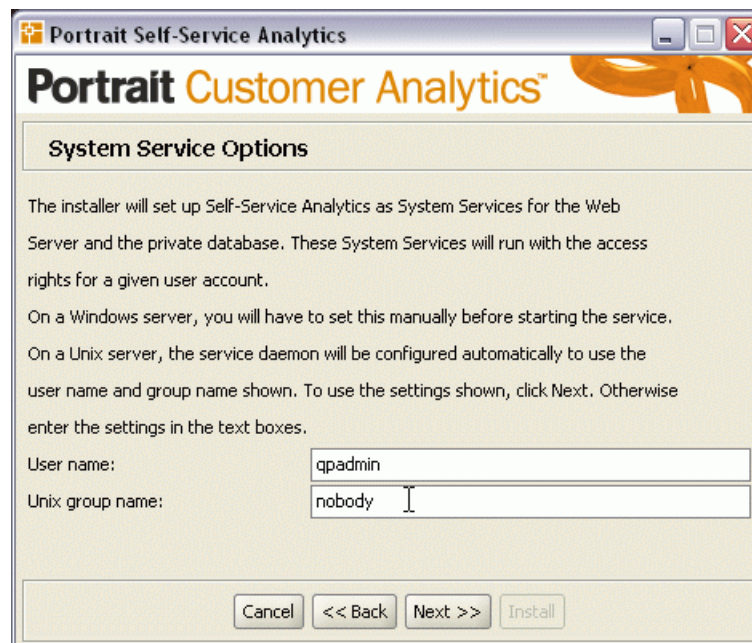
9. This Port Number should be an unused number, it will be used to access the database. The default port number should be used if available. (record in 25)



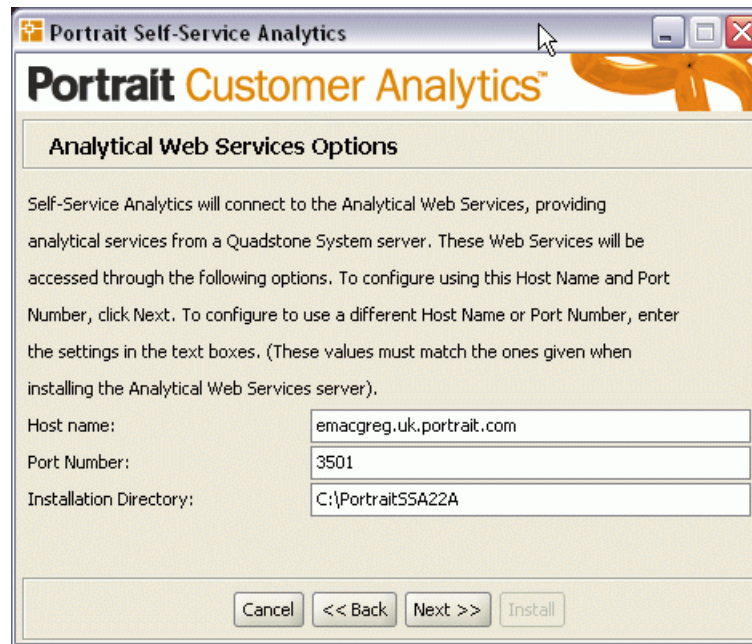
10. Select a version to upgrade content from. (record in 24)



11. The user name should be the username for the Self-Service Analytics account created before the installation (#11). The Unix group name should be the primary group for the Self-Service Analytics account (record in 26 and 27). **On a Windows platform please leave the "Unix group name" as nobody.**

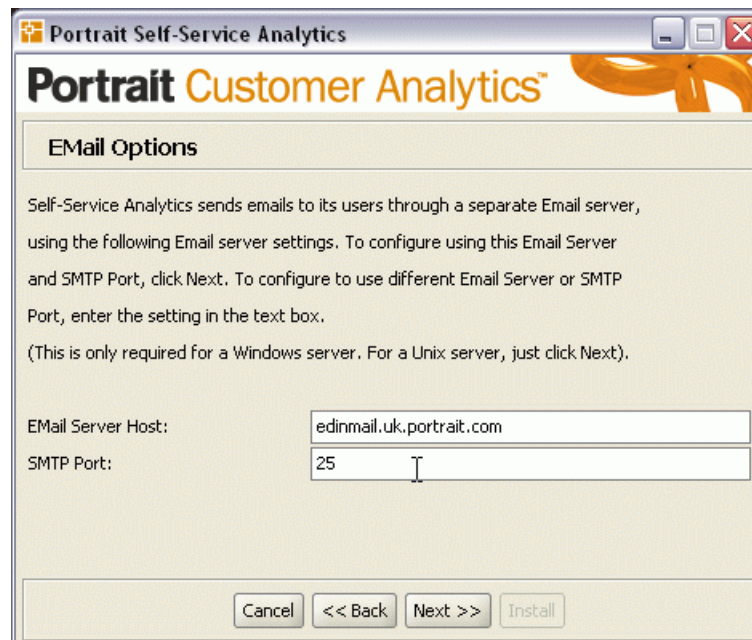


12. The host name should be the name of the machine on to which the Analytical Web Services component was installed on to (#8). The port number is the Analytical Web Services port number entered during the Analytical Web Services installation (#9) and the installation directory should be the installation directory of the Analytical Web Services component (#6) (record in 28, 29 and 30)

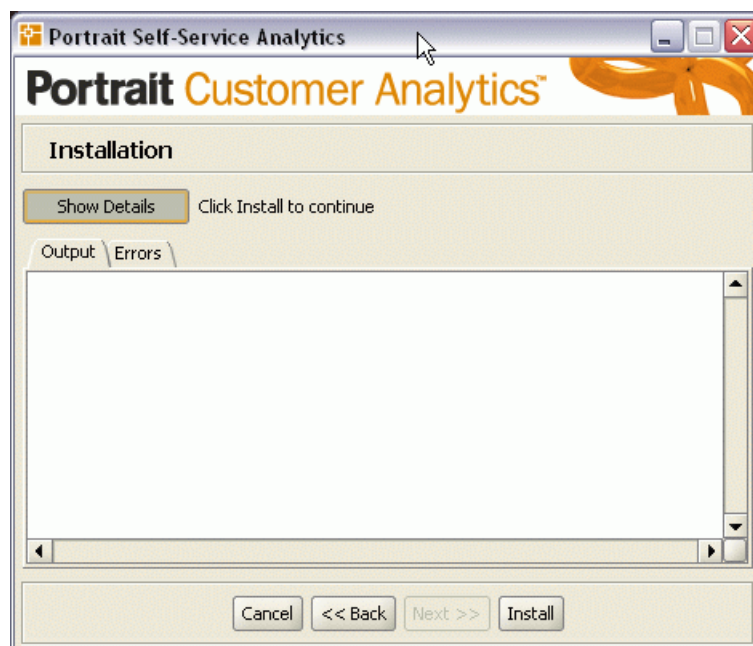


13. The Email server and SMTP port number should be entered. These can be left as the default and modified at a later date (**record in 31 and 32**).

On a UNIX platform please leave the default values.



14. You are now ready to install the Self-Service Analytics Server.



More information about the output and any errors generated can be viewed by clicking the **Show Details** button. You will receive a message telling you that the installation has finished and you will then be able to view all of the information generated before closing the installer.

On UNIX

After the Self-Service Analytics Server installation completes successfully the following message will be displayed in the UNIX window:

```
To install the Quadstone Portal system daemon,  
you must run the $QSHOME/qp2.2A/installer/postinstall-portal.sh script  
from within the installation directory that you have specified.
```

Browse to this location and execute the shell script to install the Self-Service Analytics system daemons. (**record in 33**)

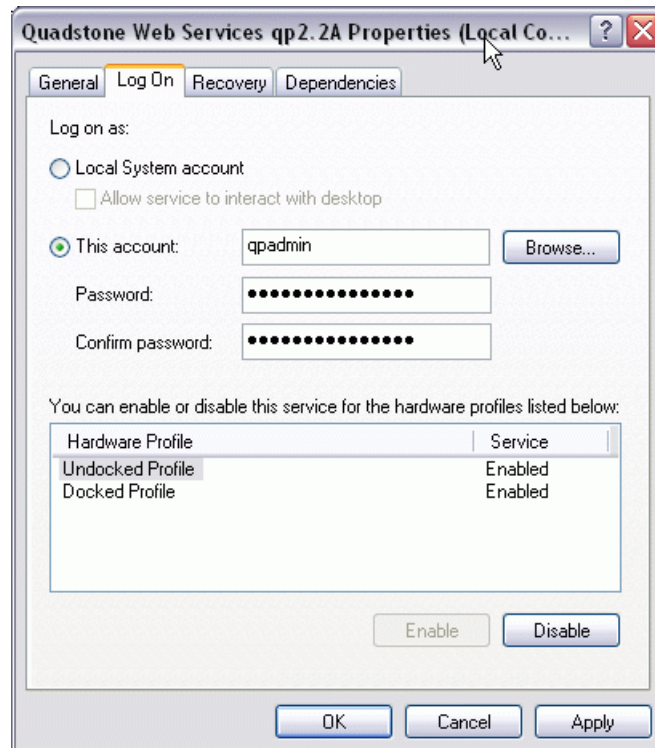
Configuring Analytical Web Services and Self-Service Analytics Server

Configure and start the services on Windows

Configure **Self-Service Analytics Web Server**, **Database Server** and the **Analytical Web Services** to make them run with the Self-Service Analytics administrator account information created before the installation.

1. Go to Control Panel→Administrative Tools→Services
2. Select Quadstone Portal Web Server qp2.2A
3. Right click and select Properties and select the Log on tab
4. Select This account radio button

5. Change the Log on settings to match the system administrator's username and password.
6. Apply and OK these new settings
7. Ensure startup is Automatic
8. Right-click on the service and select Properties
9. Ensure Startup type Automatic
10. Start the service.



11. This should also be performed for the Quadstone Portal Database Server qp2.2A service and the Quadstone Web Services qp2.2A service.
12. Ensure all of the three Self-Service Analytics services have been started and, if required, the Quadstone System version 5.3B service is running as local system.

Starting the Self-Service Analytics daemons on UNIX

To start the daemon on Solaris, run the following commands:

```
sh /etc/init.d/qpwebservices-2.2A start
sh /etc/init.d/qpportal-2.2A start
```

Basic tests to ensure that the installation is operational

Carry out the following simple tests to ensure that your Self-Service Analytics is fully operational. For more information on how to carry out each step see the on-line Self-Service Analytics documentation

(<http://support.quadstone.com/portal/2.2A/documentation/>):

- Open an Internet Explorer browser
- Enter the Self-Service Analytics URL (e.g. `http://<server>:<port>`)

-
- Login as the admin user (**admin/adm1n**)
 - Browse the **finance analysis dataset** on the homepage; Click on the **query** button; Use the default query and click **Go**
 - In the **All folders** section click **new folder**; **Title**: Test; **Folder**: click on the User Folders; **Body**: This is a test folder; Click **Submit**
 - Click **add** and then click **Add a new Article**; Add any text; View this new article
 - Click **administer**→**users**→**add**; **Username**: testuser; **E-mail address**: enter a valid working e-mail account; **Password**: enter a password for this new user.e.g. testuser
 - Click **administer**→**users**; Click on the new user and **edit**; **Roles**: **analyst and authenticated user**; Click **Save account**
 - Log out and login as this new user
 - Click on the **my account** icon and tick the **Folder navigation** option; Click **Save account**
 - Click on the article that you added as the admin user and click the **subscribe** icon
 - Go to **User Folders**→**Analyst Area**
 - Click **add**→**Add a new Document Upload**; Upload a Microsoft Word document and click **Submit**
 - Log out as this user and login as the **admin** user
 - Change the contents of the article - check a notification email is sent
 - Search for a keyword you know is present in the recently uploaded Microsoft Word document; Check that the search returns the node that has the attached Microsoft Word document; Check that you can view this document.
-

Installing the Publishing Components

This release of Self-Service Analytics does not include any additional publishing installers as the functionality is already installed by the Analytical Web Services install.

Basic tests to ensure that the publishing components are operational

Please perform the following simple tests to ensure that your Quadstone System can publish to Self-Service Analytics.

For more information on how to carry out each step see the on-line Self-Service Analytics documentation (<http://support.quadstone.com/portal/2.2A/documentation/>):

- Connect to the Quadstone System version 5.3B
- Open the Quadstone System Explorer
- Browse to a folder containing an focus file. Right click on this focus and select **Publish Focus**; a web browser should open with a form to add a new dataset to Self-Service Analytics.
- Browse to a folder containing a Crosstab file (qsxt,qsdv,qsmv,qspv or qstv). Right click on this Crosstab file and select **Publish Crosstab**; a web browser should open with a form to add a new query to Self-Service Analytics.
- Open a focus in Decisionhouse and create a Crossdistribution view with at least one field. Click the **Publish** icon on the toolbar; a web browser should open with a form to add a new query to Self-Service Analytics.

Installing support for browser applets

To use the browser applets you do not require either a Quadstone System or a Publishing client installation, however you will need to install Java 1.4.2_09 (or later) and Java 3D:

1. Log into Self-Service Analytics, using an Internet browser (the URL is (#20) on the checklist).
2. Click on the **Sitemap** icon on the toolbar to open the folder navigation area; select the **Downloads** folder.
3. Select the **Installers** folder. Alternatively you can browse to the Support site (<http://support.quadstone.com/portal/2.2A/downloads/>)
4. Select the **Java JRE 1.4.2 Installer** and install.
5. Go back and select the **Java 3D installer** and install.

Please note that the JRE 1.4.2 Installer must be run before installing the Java 3D.

Upgrading Self-Service Analytics from qp2.1B

During the Self-Service Analytics installation, there is an option to upgrade the content from a fully working version qp2.1B. If **None** was chosen during the installation process but content from a previous version is required, please contact Self-Service Analytics Support for advice.

After upgrading your Self-Service Analytics you may wish to copy any custom themes from `<QSHOME>/qp2.1B/portal/drupal/themes` into your version qp2.2A installation folder `<QSHOME>/ext/ssa-qp2.2A/portal/drupal/themes`.

Configuring cron processing

There are various housekeeping tasks within Self-Service Analytics that are performed by module cron hooks. These include; search indexing, mail handling and the new dataset series automated query evaluation facility. By default Self-Service Analytics is installed to use the **poormanscron** module to periodically fire these hooks, however these hooks can only be fired whenever users are actively using the system. This means that out of normal working hours none of the housekeeping tasks will be run.

We recommend that the cron task is configured to run once every 10 minutes throughout the entire day, this frequency is more than adequate to keep the entire system in sync whilst not overloading the system with unnecessarily frequent housekeeping.

To ensure that the housekeeping tasks are always being periodically fired, it is necessary to provide a scheduled task that can perform an HTTP request to fetch the site URL with the addition of `cron.php`. The `wget` utility can be used for batch fetching of web sites and it is available for both UNIX and Windows. The main website for `wget` is <http://www.gnu.org/software/wget>

Pre-compiled `wget` binaries can be downloaded for UNIX from the following locations:

Solaris: <http://www.sunfreeware.com>

The `wget` utility is highly customisable and accepts many command line switches, for the purpose of firing housekeeping tasks only two command line switches are necessary:

- `-O` (or `--output-document=-`): redirects output to standard output
- `-q` (or `--quiet`): runs in quiet mode meaning any output is discarded

An example command would be:

```
wget -O - -q http://<server>:<portnumber>/cron.php
```

Where `<server>` will be the network name of the host server that is running the Self-Service Analytics instance and the `<portnumber>` will be the port on which the web server is listening. If the web server has been configured to run listening only as HTTPS then you will need to replace `http` with `https` in the example argument string.

Configuring on UNIX

The `crontab` file must be set up as the user that was specified during the Self-Service Analytics installation.

An example `crontab` file to schedule a suitable `wget` cron task to run once every ten minutes on every day of the year would contain the following single line:

```
0,10,20,30,40,50, ****/user/bin/wget -O - -q  
http://<server>:<portnumber>/cron.php
```

Alternatively, set up a shell script containing your command:

```
#!/bin/sh /usr/local/bin/wget -O - -q  
http://<server>:<portnumber>/cron.php
```

The above command should be changed to reflect the actual path to `wget` and the URL of Self-Service Analytics. You should then setup the `crontab`:

```
#qp2.1B housekeeping
0,10,20,30,40,50 * * * * <path to shell script> > /dev/null 2>&1
```

Configuring on Windows

The `crontab` file should be set up as the user that was specified during Self-Service Analytics installation.

Windows provides a simple point and click interface to configure scheduled tasks in addition to a command line tool called `schtasks`. Due to slight differences in the functionality exposed by `schtasks` in different versions of Windows, only the point and click style of creating a scheduled task will be described here.

For detailed documentation on `schtasks` please see the [online Windows documentation](#)

Windows point and click configuration: Add Scheduled Task.

1. Add Scheduled Task called **qp2.2 Cron**
2. Select the Start time as midnight and Perform this task as **Every Day**
3. Run this cron as the `qp_admin` account
4. On the Task tab you need to add a double quoted argument to the end of the IEXPLORE.EXE Run command. This argument will be in the form:

```
C:/PROGRA 1/INTERN 1/iexplore.exe
"http://<server>:<portnumber>/cron.php"
```

5. Set the task to repeat Every: 10 minutes and set Until: Time: 23:59

You can check that your task is running correctly from the Scheduled Tasks window by selecting **View / Details** from the menu bar. This will tell you when the task is next scheduled to run and when it last ran. You will need to manually select **View / Refresh** to update the display.

Verifying that your cron process is running correctly

You can check that Self-Service Analytics logs by logging into Self-Service Analytics as an admin user and browsing to the URL `http://<server>:<portnumber>?q=admin/logs` and look for messages in the form **Cron run complete** that do not contain the phrase via **poormanscron**.

After configuring the scheduled cron task, it is advisable to turn off the **poormanscron** module:

1. Log in to Self-Service Analytics as a user with administrative rights
 2. Browse to the URL `http://<server>:<portnumber>?q=admin/modules`
 3. Untick the **poormanscron** enabled tick box
 4. Click the **submit** button
-

2: Administering Self-Service Analytics

Configuring Self-Service Analytics

There are a number of standard things an administrator should do when setting up a new user, the most important are listed below.

All of these require you to be logged in as an admin role and have the admin block displayed http://support.quadstone.com/portal/2.2A/documentation/#show_side_bar_blocks

Configure guest access permissions

By default, guest (or anonymous) users can see the entire example content in Self-Service Analytics (as well as being able to add comments, search documents etc). You can remove these permissions by configuring the anonymous users' roles.

http://support.quadstone.com/portal/2.2A/documentation/#forbid_guests_from_viewing_content

Remove demonstration user logins

Username	Password
admin	adm1n
analyst	analyst
data architect	d@t@
manager	m@n@ger
self service	selfservice
executive	executive
profiler	profiler

By default Self-Service Analytics is installed with demonstration accounts/users called: **admin, analyst, manager and self service** - to give examples of users and roles. These should be removed when the examples are no longer required.

http://support.quadstone.com/portal/2.2A/documentation/#remove_a_user

Configure Private Uploads

By default, Self-Service Analytics allows content to be directly browsed from the `http://<server>:<portnumber>/uploads` directory. Self-Service Analytics can be configured to serve these pages anonymously rather than directly. This is done through the **administer**→**settings** menu, in the **File System settings** section by setting the **download method** to **private**

Add a site specific theme

This allows you to add corporate colours e.g. header bar, text color, title style, links and hover colors.

You need 4 standard files: `style.css`: this is the main file to edit; `xtemplate.xtmpl`; `logo.png`; `favicon.ico`. Within the CSS file, colors can be expressed as a 6 character hex RGB color string e.g. `#ffffff` for white and `#000000` for black.

This new theme should be based on an existing theme for example **qssimple** (`<QSHOME>/ext/ssa-qp2.2A/portal/drupal/themes`) and this new theme should reference the existing theme and not be a copy as the original theme may change in a later release.

Customize the mission statement

This text appears at the top of the homepage. It is used to guide new users to what Self-Service Analytics can do and how they should find help. http://support.quadstone.com/portal/2.2A/documentation/#configure_what_text_is_displayed_on_the_homepage

Customize the site slogan

Replace 'Self - Service Analytics' displayed on the top left of each page - with something relevant to the specific site.

http://support.quadstone.com/portal/2.2A/documentation/#configure_the_Portal_slogan

Create site-specific content

Self-Service Analytics comes with some demonstration content (based on standard demonstrations); these are listed on the home page. But providing site specific content will make it much easier for new users to know what to do - if they see something they recognise.

You should:

- Create some new folders (underneath projects),
http://support.quadstone.com/portal/2.2A/documentation/#create_a_new_folder
- Add content to these folders (try to provide examples of all contents types)
http://support.quadstone.com/portal/2.2A/documentation/#add_new_content
http://support.quadstone.com/portal/2.2A/documentation/#know_what_type_of_content_has_been_published
- Promote these new folders to the homepage table of contents.
http://support.quadstone.com/portal/2.2A/documentation/#add_a_table_of_contents

Set up default dataset series

1. Log in as **admin**.
2. Go to `administer`→`settings`→`profiler`.
3. Select for example the **Finance analysis dataset series** as the current dataset series.
4. Click Save configuration.

Configure mailhandler.module POP access

This information is for Windows machines only.

There are two different sections to consider when setting up the mail handler for the Self-Service Analytics. These are the outbound and inbound:

http://support.quadstone.com/portal/2.2A/documentation/#configure_outbound_mail_handing_on_Windows

http://support.quadstone.com/portal/2.2A/documentation/#configure_inbound_mail_handing_on_Windows

Adding metadata validation into the Quadstone System

This section details how to validate metadata (and translations) using the Quadstone System inbuilt XML validation. Access to this is provided via simple right-click menus in the Quadstone System (from XML files in the Quadstone System Explorer) and through simple command line commands (`qpvalidatemetadate` and `qpvalidatetranslations`).

Installation

1. Go to the download page on the support site (<http://support.quadstone.com/portal/2.2A/downloads/>) and download the `ext/validateqpmetadata` package.
2. Unpack the `ext/validateqpmetadata` package into the `ext` directory on your Quadstone System server (e.g. `QSHOME/ext`). It should contain 3 files: a `README` and two schema.

As `validateqpmetadata` is an `ext` component it is subject to changes and new developments. For the latest installation instructions please carefully read the `README` file which was unpacked in step 2 above.

Known Problems

Failures running queries after an upgrade installation

There are cases where cached query results from the original installation cannot be accessed, resulting in failures when running identical queries in the new installation. The failure message will say that a file in the old cache cannot be made 'relative to' the new installation. If this occurs, a solution is to remove the contents of the on disk 'portal/drupal/cache' folder in the original installation. These files should be backed up in case it is necessary to roll back to the original installation.

UNIX uninstallers do not work

The UNIX uninstallers do not work when they are executed, because the scripts that are currently generated by the installers on UNIX platforms are not pointing to the correct files. Should you require to run the UNIX uninstaller, please contact [Self-Service Analytics Support, support@portraitsoftware.com](mailto:support@portraitsoftware.com).

Internet Explorer scripting security must be enabled

Self-Service Analytics requires the Internet Explorer security setting Active Scripting to be enabled.

In the Internet Explorer window perform the following and ensure that Active Scripting is enabled:

Tools→Internet Options→Security (tab)→Custom level (button)→Scripting/Active Scripting.

Index

C

customer support, for Self-Service Analytics,
[ii](#)

S

support, for Self-Service Analytics, [ii](#)

T

technical support, for Self-Service Analytics,
[ii](#)

