

CA PPM v14.3  
CA PPM v14.4  
CA PPM v15.1

Benefits Calculation Documentation  
Release 1.1 – Installation Procedure

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# Installation Instructions

## Pre-reqs

Strategic Alignment assumes:

1. You have **XOG** installed for the proper version (v14.3, v14.4, v15.1)
2. You have a **user** called “**xog**” that has a password “**gox**” with **all access rights** to xog stuff in.

## Installing the Application

1. Download the Benf ZIP file from the CA Wiki page.
2. Unzip the package file into your c:\temp folder.
3. Navigate to C:\Temp\Benf\_v1\_1
4. Right-Click the file “Benf\_v1\_1Install.bat” and select “Edit” from the Drop Down Menu
5. Locate the line where the XOG\_HOME variable is set and replace the path to reflect your XOG installation path
6. Locate the line where the SERVERNAME variable is set and replace the value with your server name or IP address
7. Locate the line where the PORTNUMBER variable is set and replace it with the appropriate value (normally, it’s 80)
8. Locate the line where the USERNAME variable is set and replace it with the username you will use (default is the ‘xog’ user)
9. Locate the line where the PASSWORD variable is set and replace it with the password for that user (default is ‘gox’)
10. Locate the line where the JAVA\_HOME variable is set and replace it with the correct JAVA\_HOME path
11. Save this file
12. Run the file by double-clicking it.
13. Navigate to C:\Temp\Benf\_v1\_1\output
14. Check all the output files for errors.
15. You shouldn’t see any errors. If you do, try to verify the reason and correct it. It’s ok to run it again after you correct something. If you don’t find the problem, drop me a note and I’ll try to help you out.
16. Security warnings for Pages and Portlets are normal – they will be corrected when the Groups are loaded. Security warnings for Groups are also normal – they will be corrected when Seed Data is loaded.

## Post-installation procedures

1. Login to Clarity with “Admin”
2. Go to the Admin tool
3. Click on Processes
4. Filter all processes starting with “Benefit”.
5. Activate all listed processes by clicking on them, navigating to “validation” and clicking on “Validate All and Activate”.
6. Navigate to C:\Temp\Benf\_v1\_1
7. Right-Click the file “Benf\_v1\_1Install\_PostValidation.bat” and select “Edit” from the Drop Down Menu
8. Locate the line where the XOG\_HOME variable is set and replace the path to reflect your XOG installation path
9. Locate the line where the SERVERNAME variable is set and replace the value with your server name or IP address
10. Locate the line where the PORTNUMBER variable is set and replace it with the appropriate value (normally, it’s 80)
11. Locate the line where the USERNAME variable is set and replace it with the username you will use (default is the ‘xog’ user)
12. Locate the line where the PASSWORD variable is set and replace it with the password for that user (default is ‘gox’)
13. Locate the line where the JAVA\_HOME variable is set and replace it with the correct JAVA\_HOME path
14. Save this file
15. Run the file by double-clicking it.
16. Navigate to C:\Temp\Benf\_v1\_1\output
17. Check all the output files for errors.
18. You shouldn’t see any errors. If you do, try to verify the reason and correct it. It’s ok to run it again after you correct something. If you don’t find the problem, drop me a note and I’ll try to help you out.
19. Login to CA PPM as Admin
20. Navigate to Administration, Studio, Objects
21. Open Object “Benefit Plan”
22. Click on the Actions Tab.
23. Create a new Action called “Initialize Benefits Variable” with code “benf\_init\_vars”
24. The new Action should call process “Benefits Variable Initialize”. Do not map any attributes.
25. Create a new Action called “Generate and Update Benefits Plan” with code “benf\_gen\_upd\_plan”
26. The new Action should call process “Benefit Plan Generate and Update”. Do not map any attributes.
27. Click on the Views tab
28. Select the correct partition (for Demo Dataset, “All Organizations”)
29. Click on the “Actions Menu” for the Properties Views
30. Click the “General” actions menu
31. Move your new actions to the Selected Actions.
32. Save and Return

## Installing Demo Data

1. After installing the application, if demo data is necessary, follow these steps
2. Right-Click the file “Benf\_v1\_1Install\_Demo.bat” and select “Edit” from the Drop Down Menu
3. Locate the line where the XOG\_HOME variable is set and replace the path to reflect your XOG installation path
4. Locate the line where the SERVERNAME variable is set and replace the value with your server name or IP address
5. Locate the line where the PORTNUMBER variable is set and replace it with the appropriate value (normally, it’s 80)
6. Locate the line where the USERNAME variable is set and replace it with the username you will use (default is the ‘xog’ user)
7. Locate the line where the PASSWORD variable is set and replace it with the password for that user (default is ‘gox’)
8. Locate the line where the JAVA\_HOME variable is set and replace it with the correct JAVA\_HOME path
9. Save this file
10. Run “Benf\_v1\_1Install\_Demo.bat”

Note:   
*Demo Data for Benefits Management 1.1 contains actual benefits calculation for CA PPM created by our Global Presales ROI Team.*

# Known Issues

“Return” from Process details doesn’t return to the Idea Benefit Plan Process tab.

1. While inside an Idea Benefit Plan
2. After running a process, go to the Processes tab
3. Click on the “Messages” icon to see the messages logged by the process.
4. Click Return.
   1. Expected: return to the Process tab for that Benefit Plan.
   2. Actual: return to a Generic Process tab with no context
   3. Workaround: click on CA PPM’s Back/History Button to go back to the Idea Benefit Plan.

# Technical Summary

## Object Description

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Object** | **ID** | **Master – Subobject** | **Description** | **Additional information** |
| Benefit Variable | benf\_variable | Master Object | Benefit Variables are the variables used in the Benefit calculation. |  |
| Benefit Calculation | benf\_calc | Master Object | Benefit Calculation correspond to a specific Benefit, that uses pre-determined variables and a formula referencing those variables. |  |
| Benefit Group | benf\_group | Master Object | Benefit Groups correspond to a group of specific Benefits for a specific Project Type. |  |
| Benefit Plan Variables | benf\_plan\_var | SubObject to BenefitPlan | Benefit Plan Variables will contain the investment-specific variables to be filled in by the investment manager before calculating the Benefits. |  |

## Pages

|  |  |  |  |
| --- | --- | --- | --- |
| **Page** | **ID** | **Custom TABs** | **Description** |
| [Benefit](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_bsc_perspFrame&id=5009062&obsType=Page&principal_type=SYSTEM&principal_id=0) Variable Default Layout | odf.benf\_variableFrame | n/a |  |
| [Benefit](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_bsc_perspFrame&id=5009062&obsType=Page&principal_type=SYSTEM&principal_id=0) Calculation Default Layout | odf.benf\_calcFrame | n/a |  |
| [Benefit](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_bsc_perspFrame&id=5009062&obsType=Page&principal_type=SYSTEM&principal_id=0) Group Default Layout | odf.benf\_groupFrame | n/a |  |

## Processes

|  |  |
| --- | --- |
| **Process** | **Description** |
| Benefit Plan Generate and Update | Generates and/or updates the Benefit Plan using the declared Benefit Group and Benefit Plan Profile. To be executed using the “Actions” menu in the Benefit Plan |
| Benefit Variables Initialize | Loads the Investment-Driven variables into the Benefit Plan Variable subobject. To be executed using the “Actions” menu in the Benefit Plan |