

CA PPM v14.2  
CA PPM Eltz Preview

Benefits Calculation Documentation  
Release 1.0 – Installation Procedure

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# Installation Instructions

## Pre-reqs

Strategic Alignment assumes:

1. You have **XOG** installed for the proper version (v14.2)
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
4. Right-Click the file “Benf\_v1Install.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. Save this file
11. Run the file by double-clicking it.
12. Navigate to C:\Temp\Benf\_v1\output
13. Check all the output files for errors.
14. 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.
15. 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
7. Right-Click the file “Benf\_v1Install\_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. Save this file
14. Run the file by double-clicking it.
15. Navigate to C:\Temp\Benf\_v1\output
16. Check all the output files for errors.
17. 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.
18. Manually change the Benefit Plan Detail list Views to add the following (apparently this is a bug – they are not updated by XOG):
    1. Open the Benefit Plan Detail object
    2. Go to Views, All Organizations
    3. Add Benefit Category and Calculated Benefit to the “Benefit Plan Detail – List” right after the “subclass”
    4. Add Benefit Category and Calculated Benefit to the “Idea Benefit Plan Detail – List” right after the “subclass”

## Installing Demo Data

1. After installing the application, if demo data is necessary, follow these steps
2. Right-Click the file “Benf\_v1Install\_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. Save this file
9. Run “Benf\_v1Install\_Demo.bat”

# 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 |