



# Temenos Analytics & Reporting Installation Guide R16



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## Overview

This guide covers the installation of the Insight BI Platform and the Insight Applications. You can install all the Insight components in one single server or can run the same installer in different servers (Database or Application server) selecting the components you want to install in each server.

If you are installing the database components and application components on separate servers, copy the Installer onto each target server, and run separately.

When running the installer you can click on the Help buttons at the bottom of each dialog, or the small “?” buttons next to each editable field for more information.

## Pre-requisites

Before you run the installer, please make sure that you have the following prerequisites:

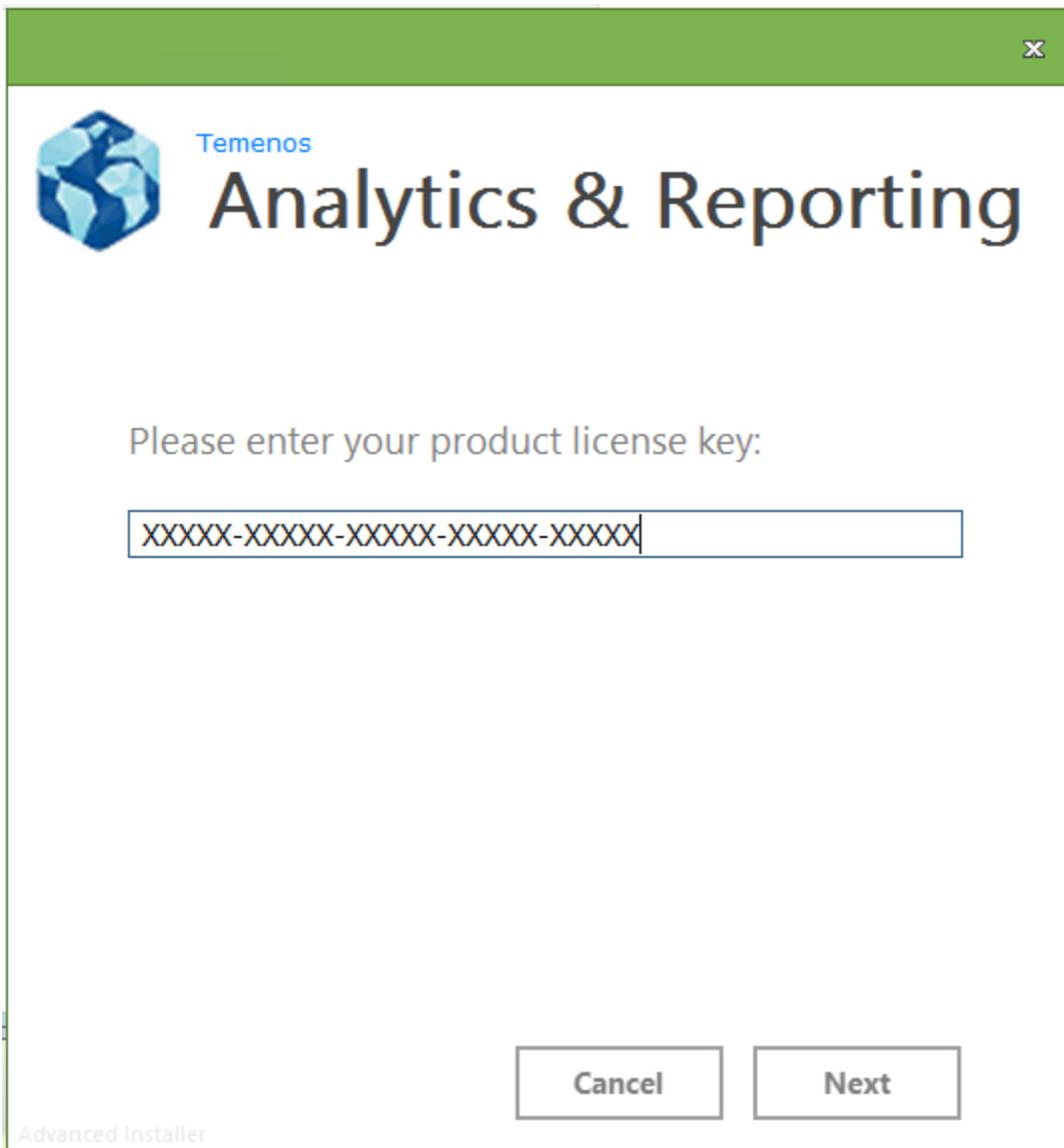
- Get the Insight R16 installer package from distribution, as well as the corresponding product license key.
- Software and Hardware requirements. Please make sure that you review the Insight BI Platform Environment Requirements R16 document and that the required software components have been installed and configured in the corresponding servers.
- InsightService Domain Account. **Create an Active Directory account for Insight services**, this account will be set as the identity in the Application Pools for the web applications.
- **Create a domain group for Insight users**. This will be used to grant access to SSRS and Cubes and it will be easier to maintain as opposed to adding each user every time.
- In order to be able to process the cubes from the ETL Job, **you need to add the user that the SQL Server Agent service is logged on as to the Cube Admin role in the InsightWarehouseOLAP database (SSAS)**.
- Windows Authentication. When using windows authentication instead of forms authentication consider the following:
  - **Service Account. Have a windows domain service account with query rights to the Active Directory Server**. This account is used by the application to query Active Directory for the authentication of the users as well as querying what groups the user belongs to. It could be a different account as the Insight Service account mentioned above, or the same one, as long as it has query rights to query Active Directory.
  - When using Windows Authentication, please create the following Active Directory Groups:
    - Insight Application Admins
    - Insight Application Users
    - Insight Application Content Managers
  - Once you have created these groups, link the corresponding users to the groups, so that when they access the Insight Application they get authorized properly. You need to do this before running the Insight Application for the first time at least for the user account you are logged into to test the Insight Application for the first time.
- Administrator rights on Insight Servers. Make sure that the user that you login to the Insight server(s) is a local administrator when you run the Insight Installer.

- **Install .NET Framework 3.5 on the server where the SSRS reports will be installed.** It is required by the installer, otherwise you will not be able to install the SSRS reports.
- **Make sure that the Report Server Name is included in the Trusted Sites or Local Intranet Sites in the Internet Explorer Security settings.** Not only the localhost value but the Server name as well.
- **It is important to unblock the SQL engine and the SSAS ports from the firewall so that the application can query the different databases.** For example, for the default instances of SQL it is normally port 1433 and for SSAS is 2383, if you are installing the databases or the cubes in a different instance, identify the ports for that instance and unblock them. If these ports are blocked the installation will not run properly.
- When installing the Insight BI Platform databases to a SQL Server different from the target, it is very important to create a shared drive on the target server for the Shared Data Path folder (Typically C:\TFS DataPath) and grant access to the user running the installer. On the installer dialog for the Shared Data Path, enter the shared folder value, for example:  
“\\TargetServerName\TFS DataPath”
- **When running the installer on a single server, there is no need to create a shared folder, just a regular folder such as “C:\TFS DataPath”**

## Single Server Installation

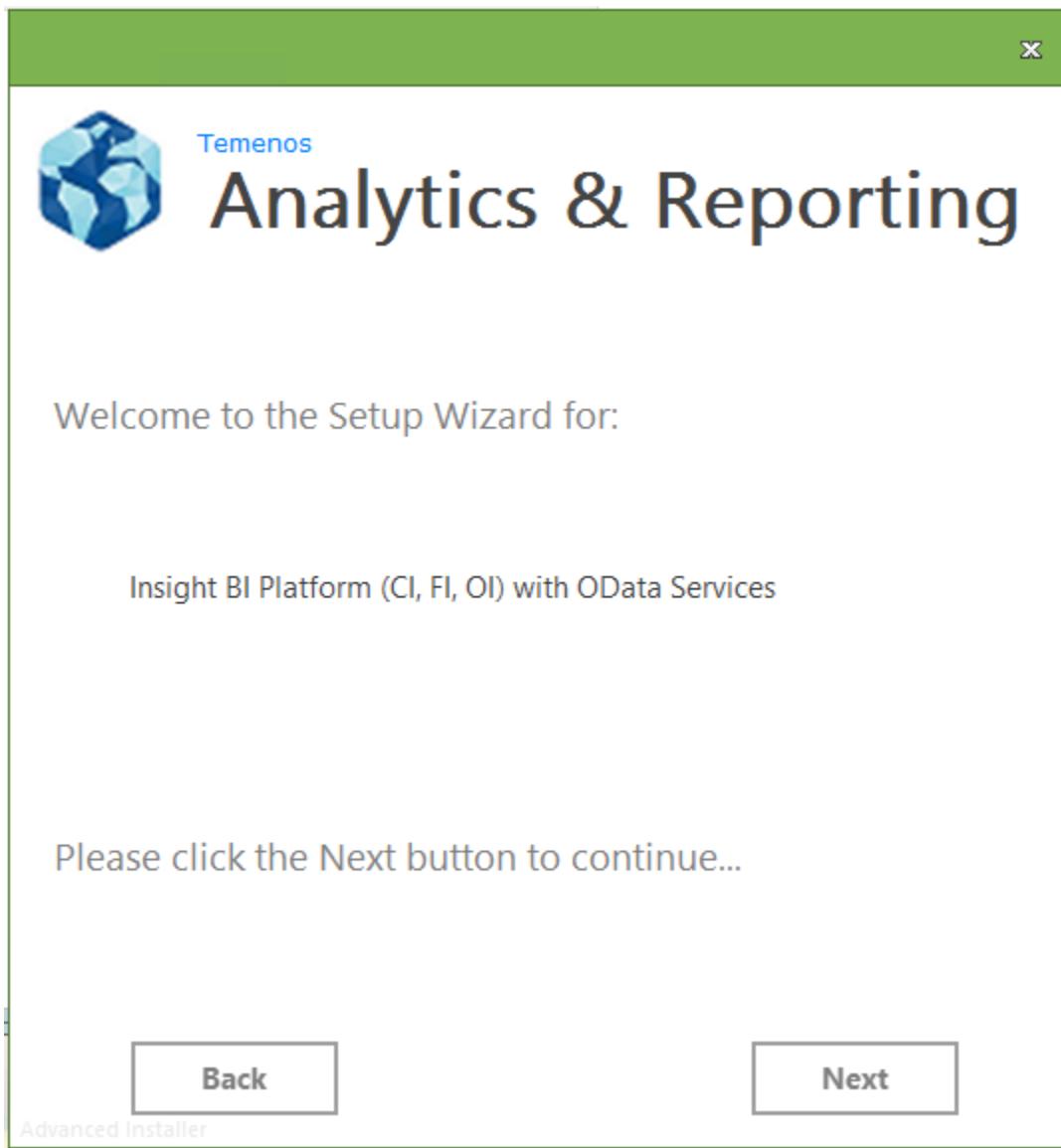
You can install the Insight components in one single server, depending on your requirements and/or data volume, please refer to the Insight BI Platform Environment Requirements document for more details on the server configuration suited for your organization.

Run the Insight\_R16\_Setup.exe installer on the server you would like to install. The first dialog will ask you for the product license key. You should have gotten this key from distribution, if you have not please talk to the project manager.



Enter the product license key and click the Next button.

The installer validates the product license key and takes you to the welcome dialog.



Click Next to continue.

The Features Dialog shows all the different components that you can install. For the single server installation leave them all selected and click Next.

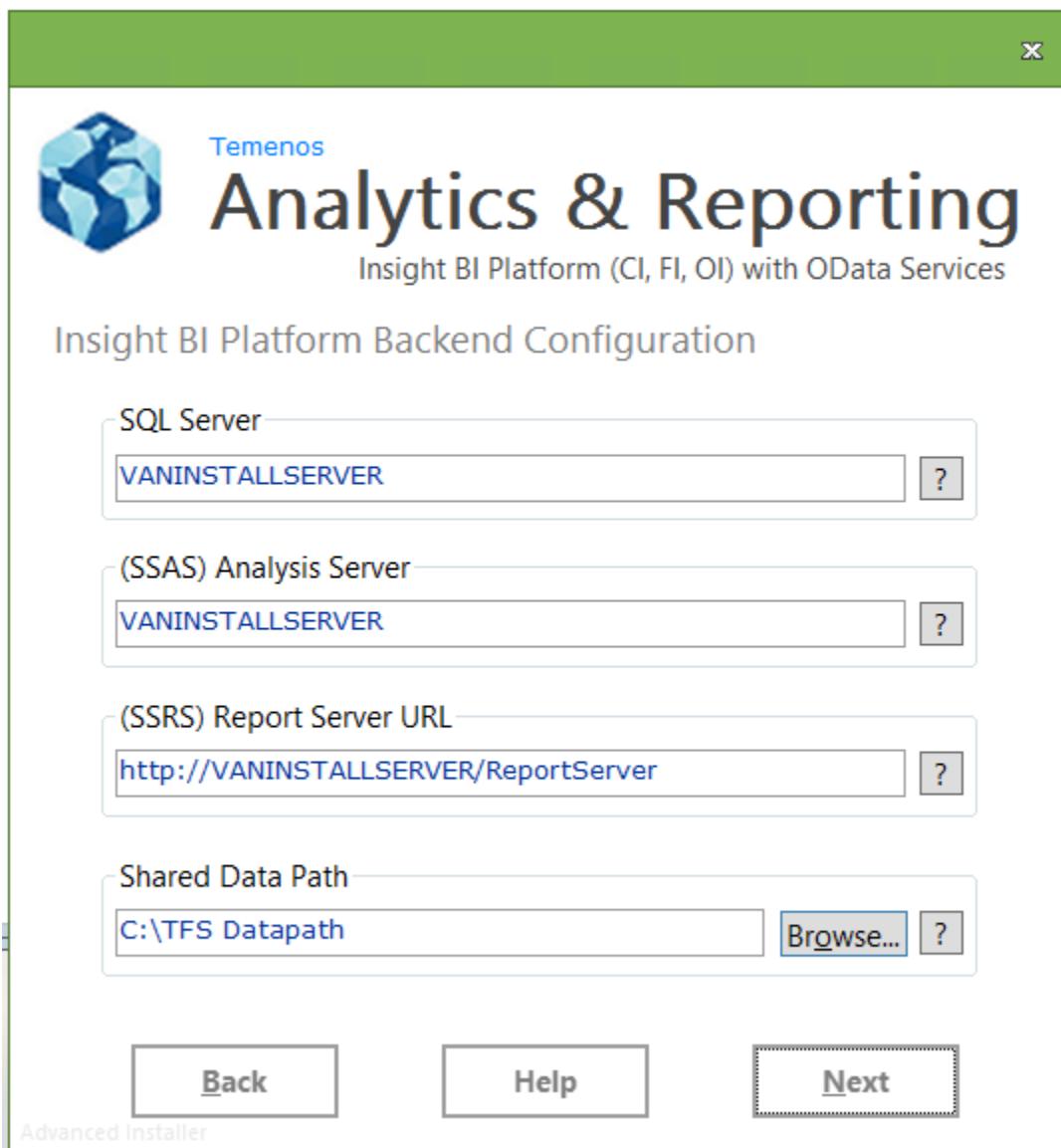


The Insight BI Platform Backend Configuration dialog is where you will be entering the information about the server where you will be installing the Insight BI Platform databases, the cubes and the report templates.

Note, if you are installing these components in a named instance in SQL Server, SSAS and/or SSRS, please provide the instance name when applicable. For example, for SQL Server (SERVERNAME\INSTANCENAME) for SSAS (SERVERNAME\INSTANCENAME) and for SSRS URL ([http://SERVERNAME/ReportServer\\_INSTANCENAME](http://SERVERNAME/ReportServer_INSTANCENAME)). If you are not sure what is the SSRS URL you can look at the Reporting Services Configuration Manager to get the corresponding URL.

In this dialog you also need to provide the Shared Data Path where the xml data file will be located when deploying the Insight BI Platform databases. **For a single server installation you can just create a local folder on the server where the user running the installer have read and write privileges. For example "C:\TFS DataPath".**

Make sure that the folder is valid and via the Browse button you can select it.

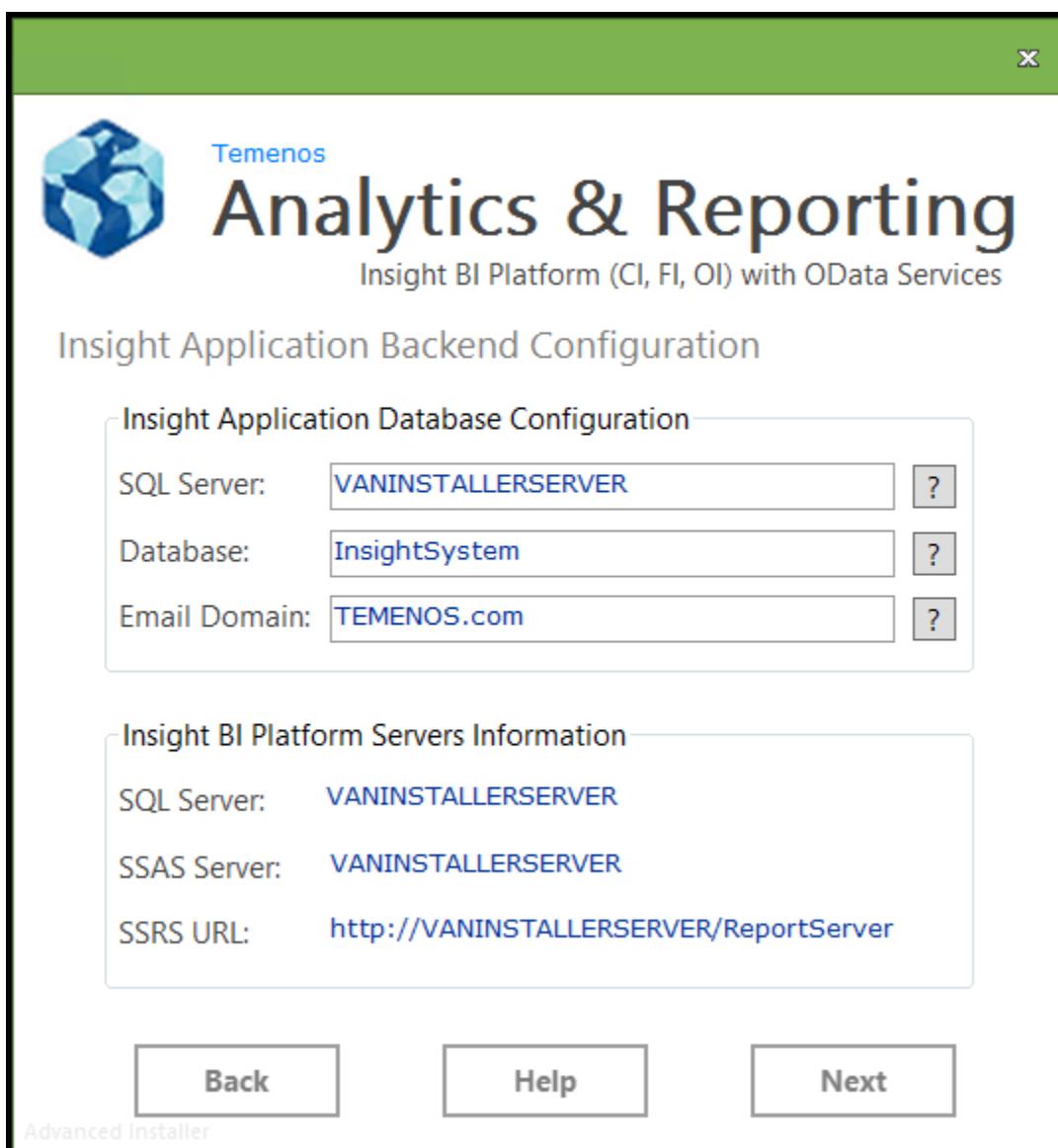


Click on the Next button.

The Insight Application Backend Configuration dialog is where you will enter the information for the Insight Application database.

Here you will specify the SQL Server Name where the database will be deployed. By default the name of the database is InsightSystem you can leave it as is, unless you want to change it. **For single server installation we will have the same SQL Server name as the Insight BI Platform SQL Server and default the database name to InsightSystem.**

**The Email Domain field is where you enter the organization domain.** If you will be using Forms Authentication for Insight Application then you need to type the full email domain name of your organization (i.e. "Temenos.com", "BankABC.ca", etc). If you will be using Windows Authentication then this field should be populated with only the Domain Name of your organization such as "Temenos", "BankABC", etc. without the ".com" or ".ca"



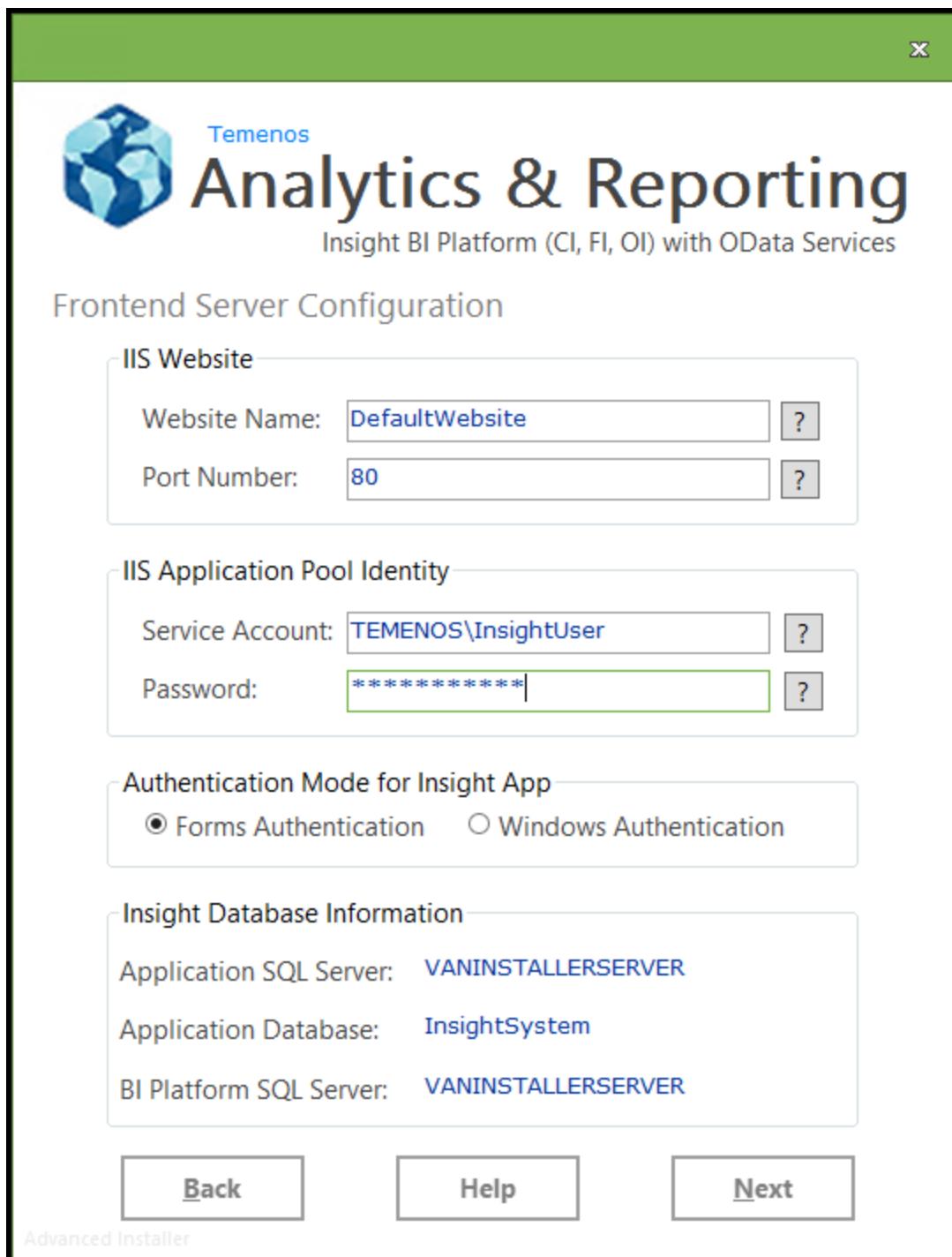
Click Next to continue.

The Frontend Server Configuration dialog is where you will specify the necessary information to create both web applications, the Insight Application and the Insight Data Manager.

The IIS Website section allows you to enter the website name and port number. The Default Website in IIS uses port 80. You can leave as is, or change the name and port number if you would like to use a different website.

For the IIS Application Pool Identity section use the Domain service account for Insight (Insight Service Account) this service account is the one mentioned in the prerequisites with access to the different insight databases. This account will be used as the identity of the application pool for these two web applications. You also need to enter the password for the service account.

In this dialog you also specify the authentication mode you would like to have for the Insight Application, select one of the radio buttons, Forms Authentication or Windows Authentication.



Click Next to continue.

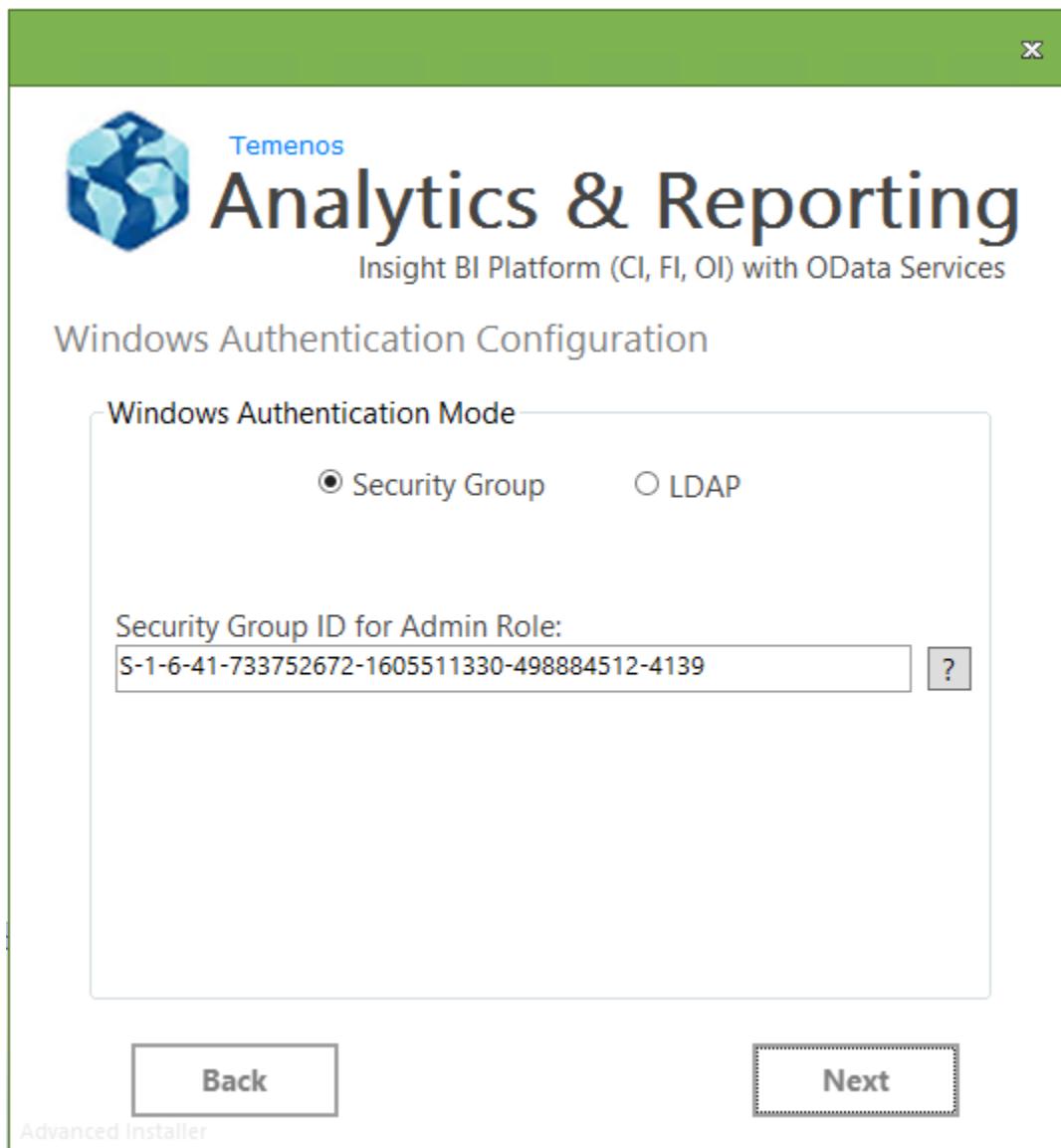
## Windows Authentication

If you selected Windows Authentication in the previous dialog then you will be prompted with the Windows Authentication Configuration dialog.

There needs to be an Active Directory group, designated to connect with the Admin role in the application. More Active Directory groups can be connected with the application later.

The Insight Application supports two ways to do Windows Authentication, one by providing the Security Group ID for the Admin Role or by providing credentials to query the Active Directory via LDAP.

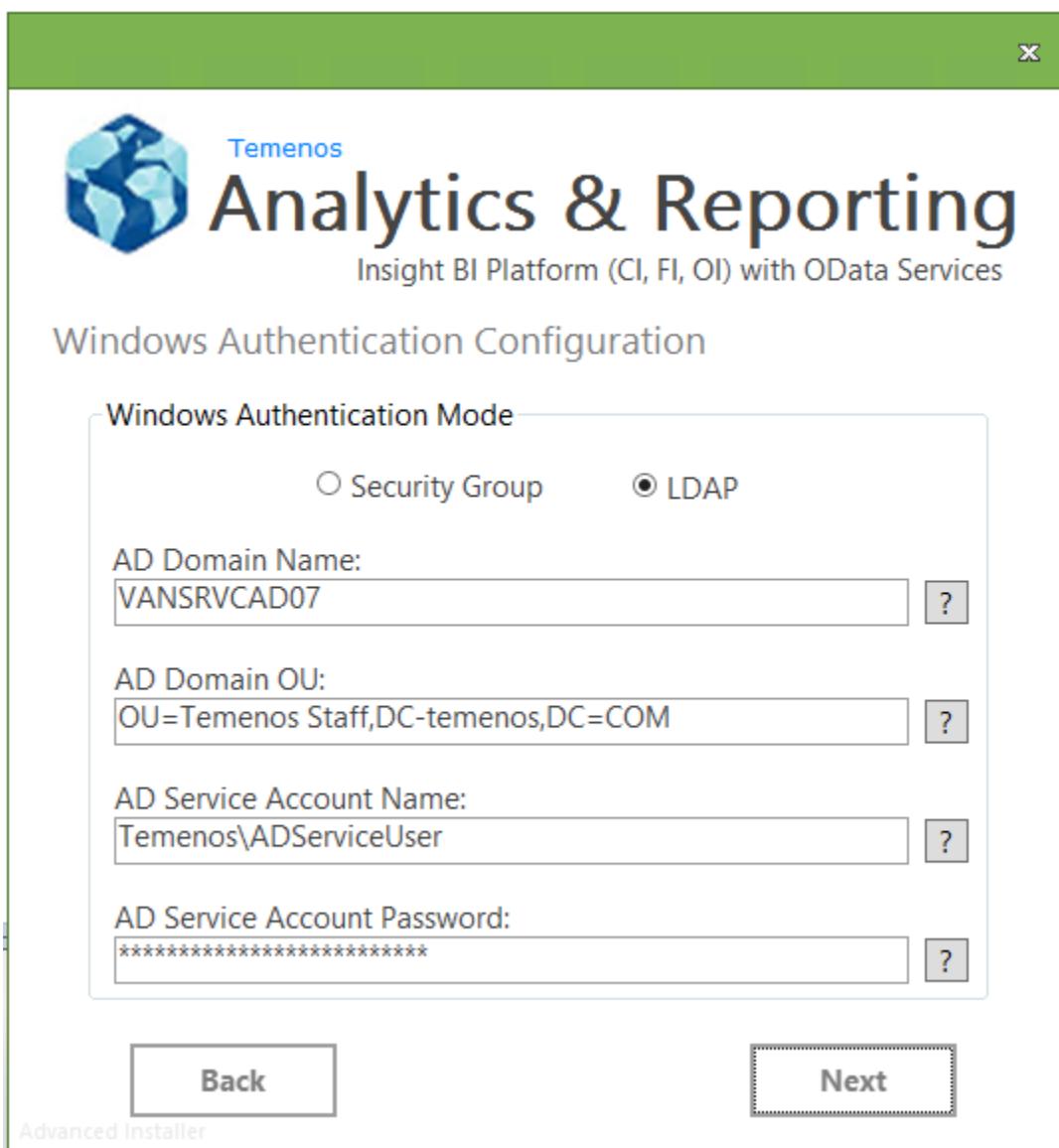
If the Security Group radio box is selected, then you just need to provide the Security Group ID for the Admin Role, you will need to contact your Active Directory expert to be able to provide you with this ID.



If you select the LDAP radio button then you will be prompted to enter information so that the application can query the Active Directory information for each user that tries to use the application. Such as the AD Domain Name, the Domain OU (Organizational Unit).

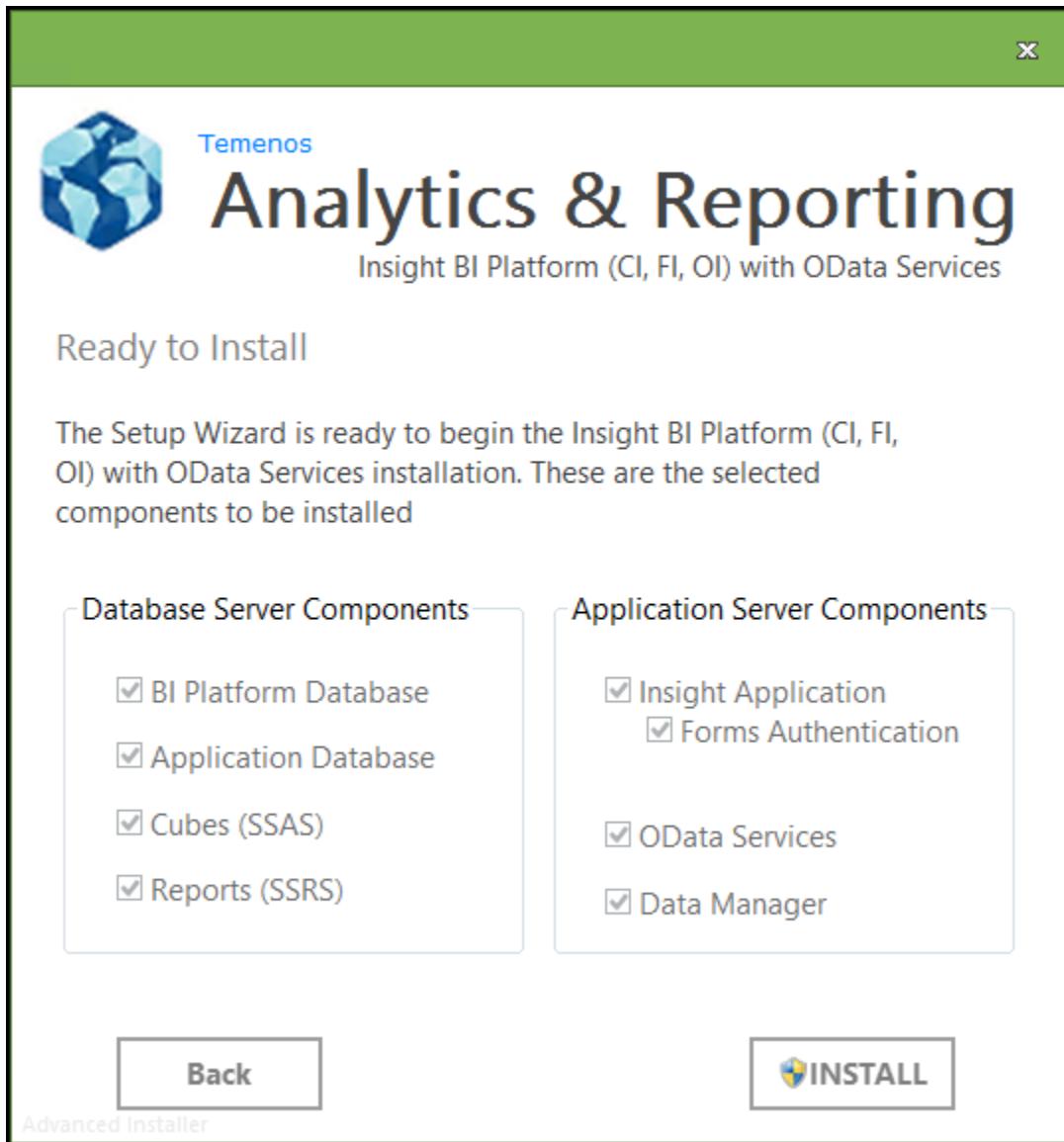
The AD Service Account Name is where you enter a domain account that has enough privileges to query Active Directory for the authentication of the users as well as querying what groups the user belongs to. You also need to provide its password, so that the Insight Application can use all these components to query the Active Directory Server.

This AD Service Account should have query access to the Active Directory Server, it could be a different account as the Insight Service account mentioned above for the Application Pools, or the same one, as long as it has query rights to query Active Directory.

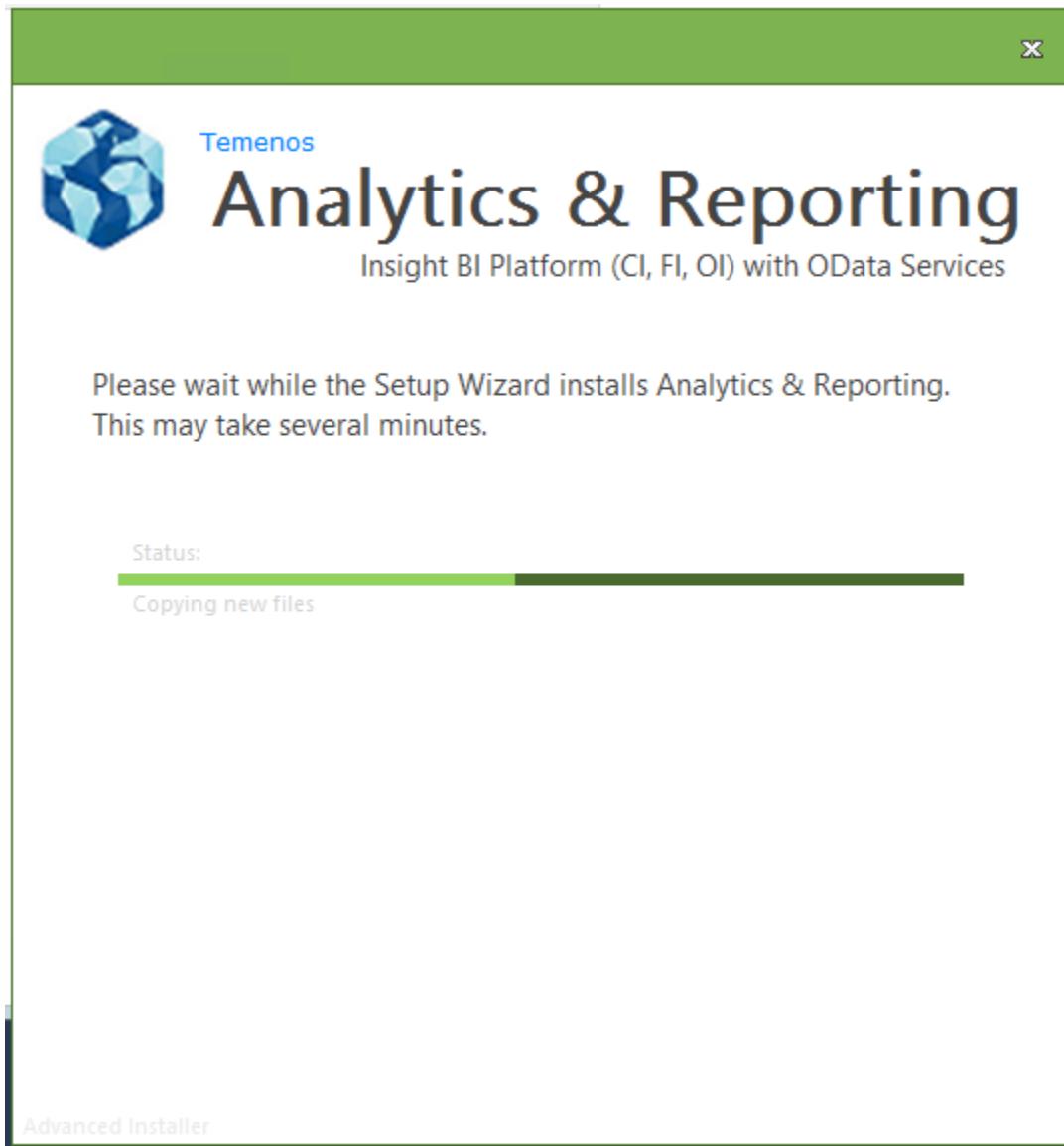


Click Next to continue.

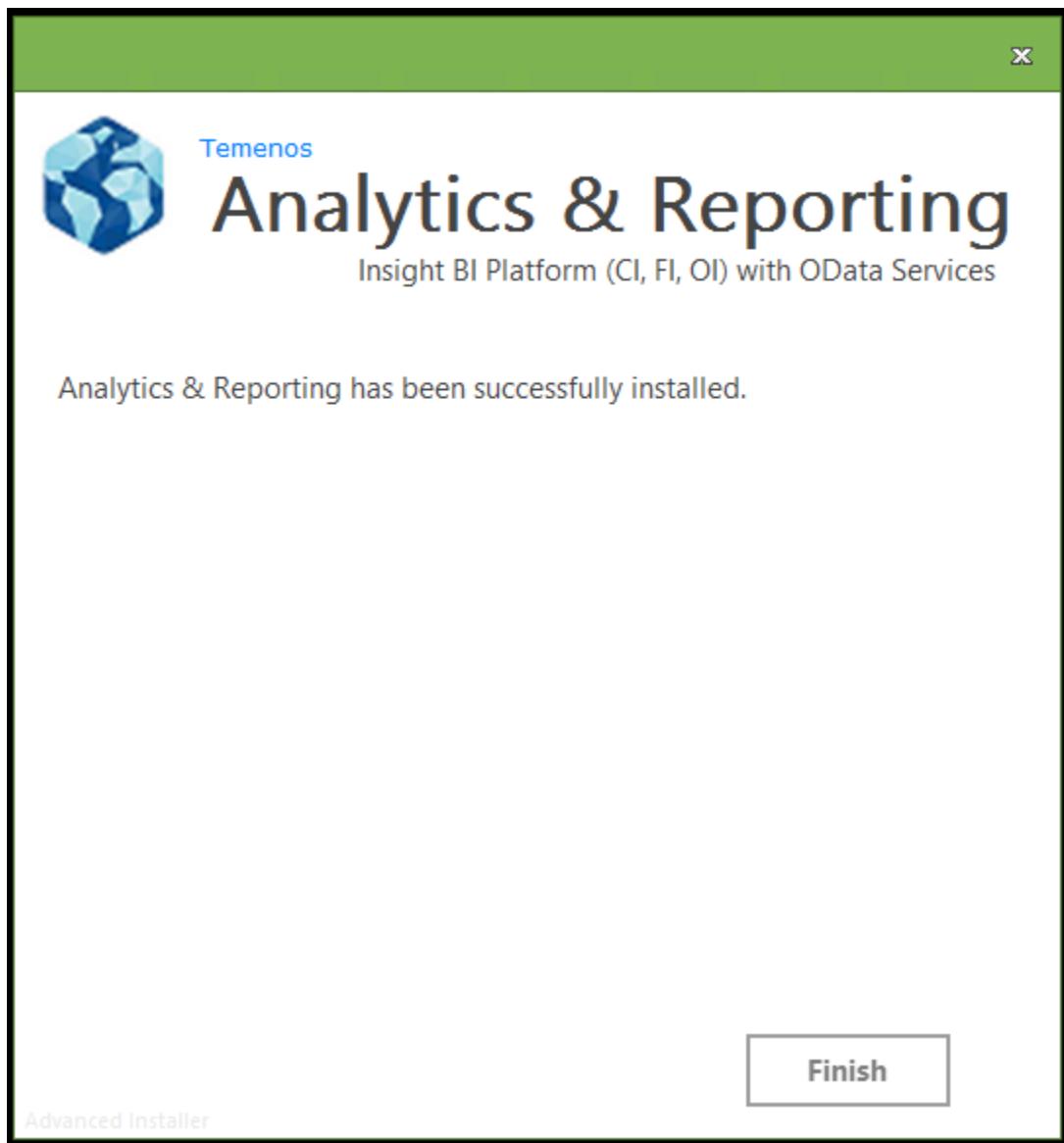
The Ready to Install Dialog is the last one before the execution of the Installer. This dialog shows you a summary of the components that were selected and will be installed. At this point you can click the Back button to update any settings you entered, or you can click on the Install button to proceed.



The installer will extract all the necessary files for the installation and will be installing the corresponding components. Depending on the performance of the server and the selected components to install this could take from 15 minutes to 45 minutes, especially for a single server installation.



After the installation has been done you will see the final dialog and then you can click Finish.

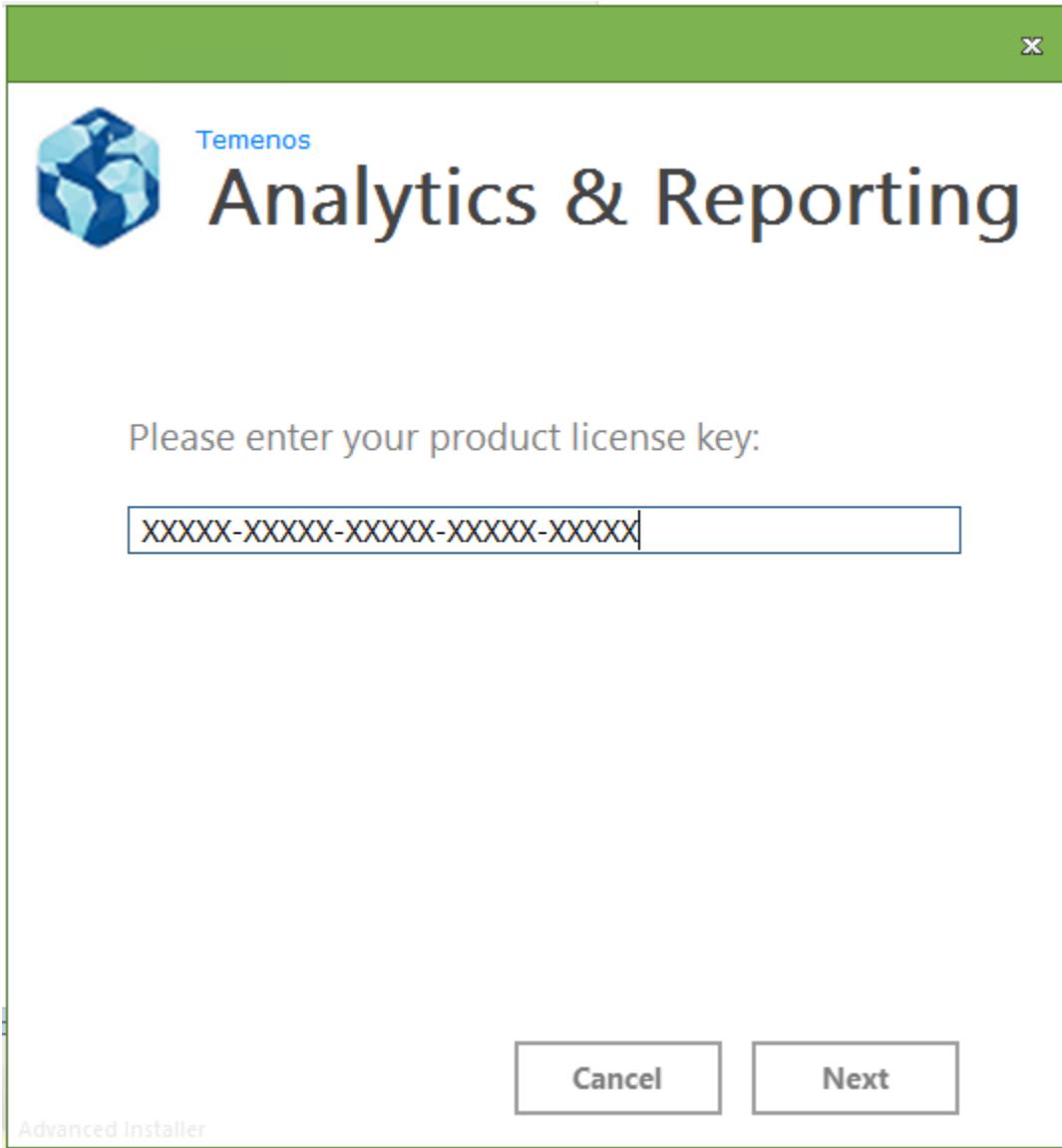


## Multi Server Installation

The insight solution can be deployed in a distributed environment having for example the database components in a Database Server and the application components in an Application Server.

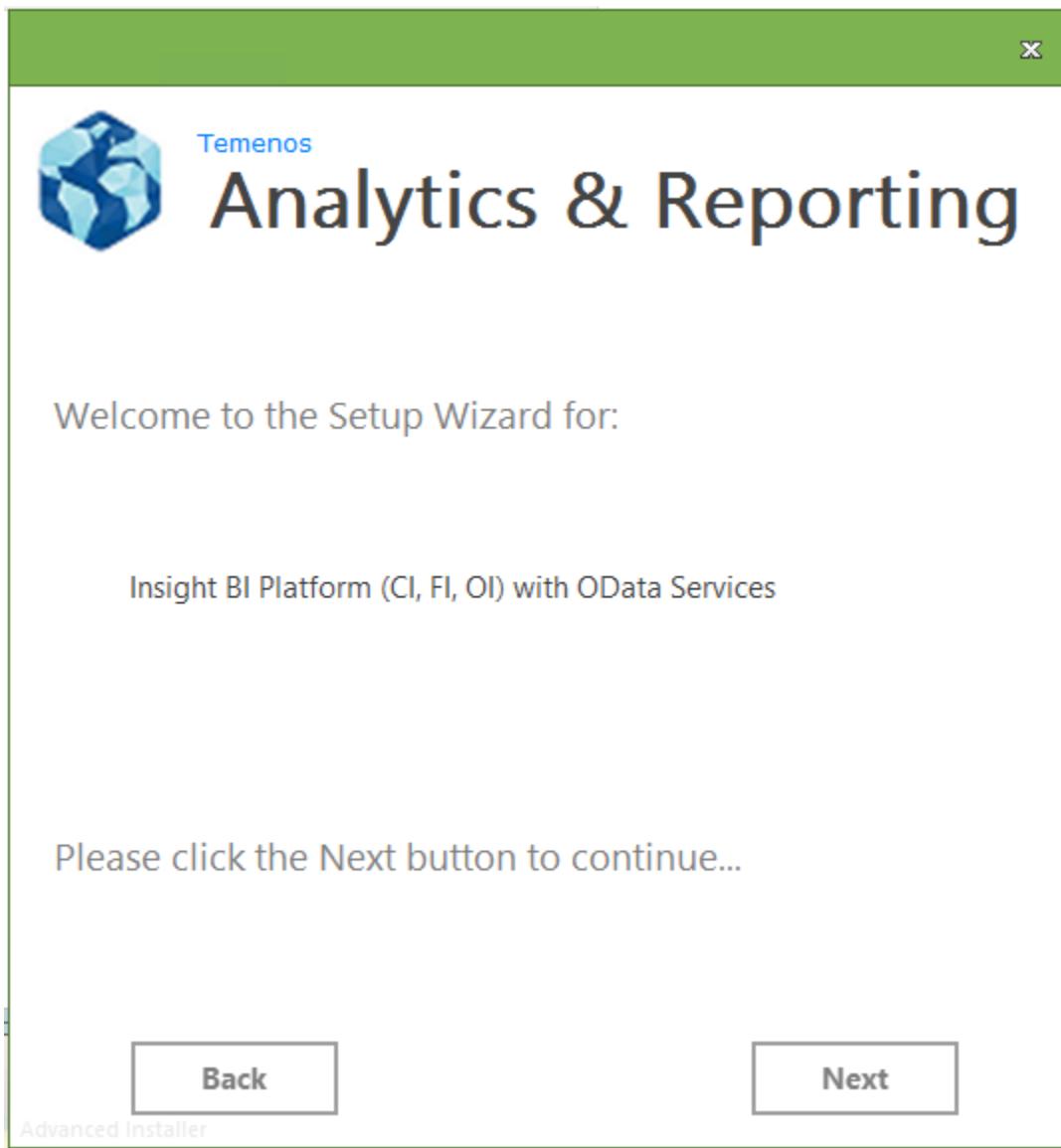
### Database Server

Run the Insight\_R16\_Setup.exe installer on the database server you would like to install. The first dialog will ask you for the product license key. You should have gotten this key from distribution, if you have not please talk to the project manager.



Enter the product license key and click the Next button.

The installer validates the product license key and takes you to the welcome dialog.



Click Next to continue.

The Features Dialog shows all the different components that you can install. For the Database server installation you can select the SQL Server, SSAS and SSRS components as shown below.



Click Next to continue

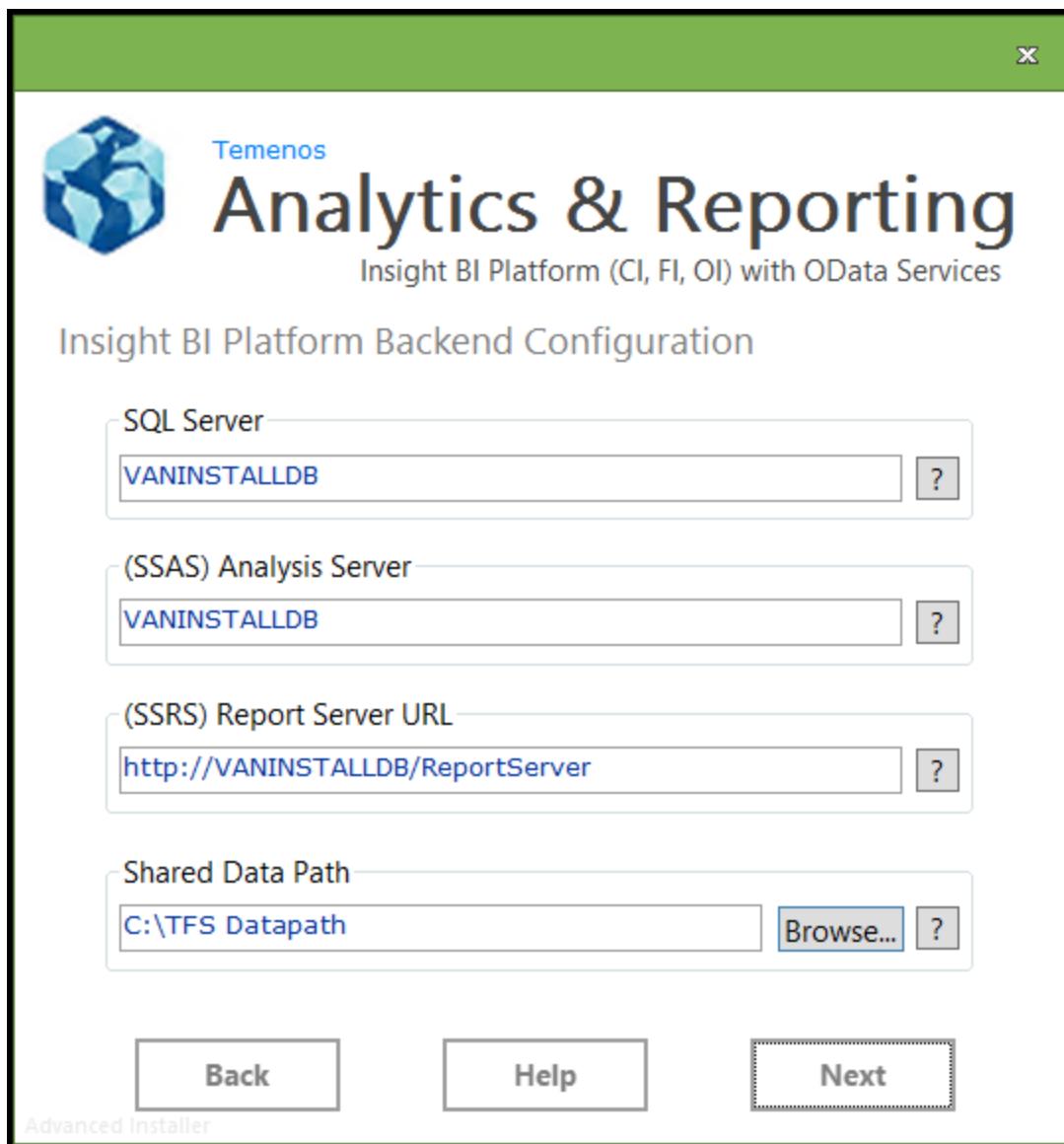
The Insight BI Platform Backend Configuration dialog is where you will be entering the information about the server where you will be installing the Insight BI Platform databases, the cubes and the report templates.

Note, if you are installing these components in a named instance in SQL Server, SSAS and/or SSRS, please provide the instance name when applicable. For example, for SQL Server (SERVERNAME\INSTANCENAME) for SSAS (SERVERNAME\INSTANCENAME) and for SSRS URL ([http://SERVERNAME/ReportServer\\_INSTANCENAME](http://SERVERNAME/ReportServer_INSTANCENAME)). If you are not sure what is the SSRS URL you can look at the Reporting Services Configuration Manager to get the corresponding URL.

In this dialog you also need to provide the Shared Data Path where the xml data file will be located when deploying the Insight BI Platform databases. For a single server installation you can just create a local folder on the server where the user running the installer have read and write privileges. For example "C:\TFS DataPath".

When installing the Insight BI Platform databases to a SQL Server different from the target, it is very important to create a shared drive on the target server for the Shared Data Path folder (Typically C:\TFS DataPath) and grant access to the user running the installer. On the installer dialog for the Shared Data Path, enter the shared folder value, for example: "\\\TargetServerName\TFS DataPath"

Make sure that the folder or the shared folder is valid and via the Browse button you can select it.

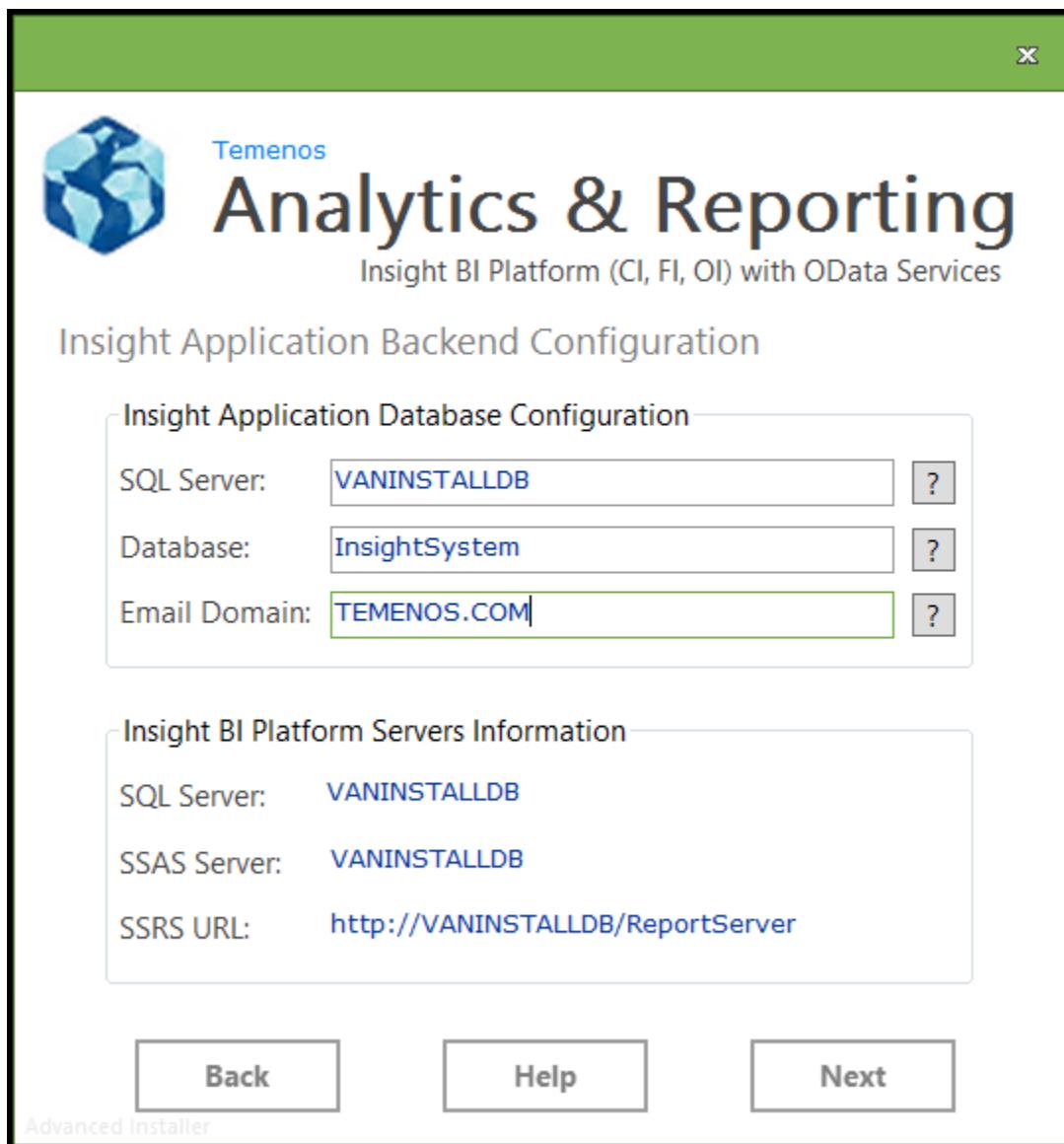


Click on the Next button.

The Insight Application Backend Configuration dialog is where you will enter the information for the Insight Application database.

Here you will specify the SQL Server Name where the database will be deployed. By default the name of the database is InsightSystem you can leave it as is, unless you want to change it, you just need to remember the name as you will need to enter it when you run the installer in the Application Server.

The Email Domain field is where you enter the organization domain. If you will be using Forms Authentication for Insight Application then you need to type the full email domain name of your organization (i.e. "Temenos.com", "BankABC.ca", etc). If you will be using Windows Authentication then this field should be populated with only the Domain Name of your organization such as "Temenos", "BankABC", etc. without the ".com" or ".ca"



Click Next to continue.

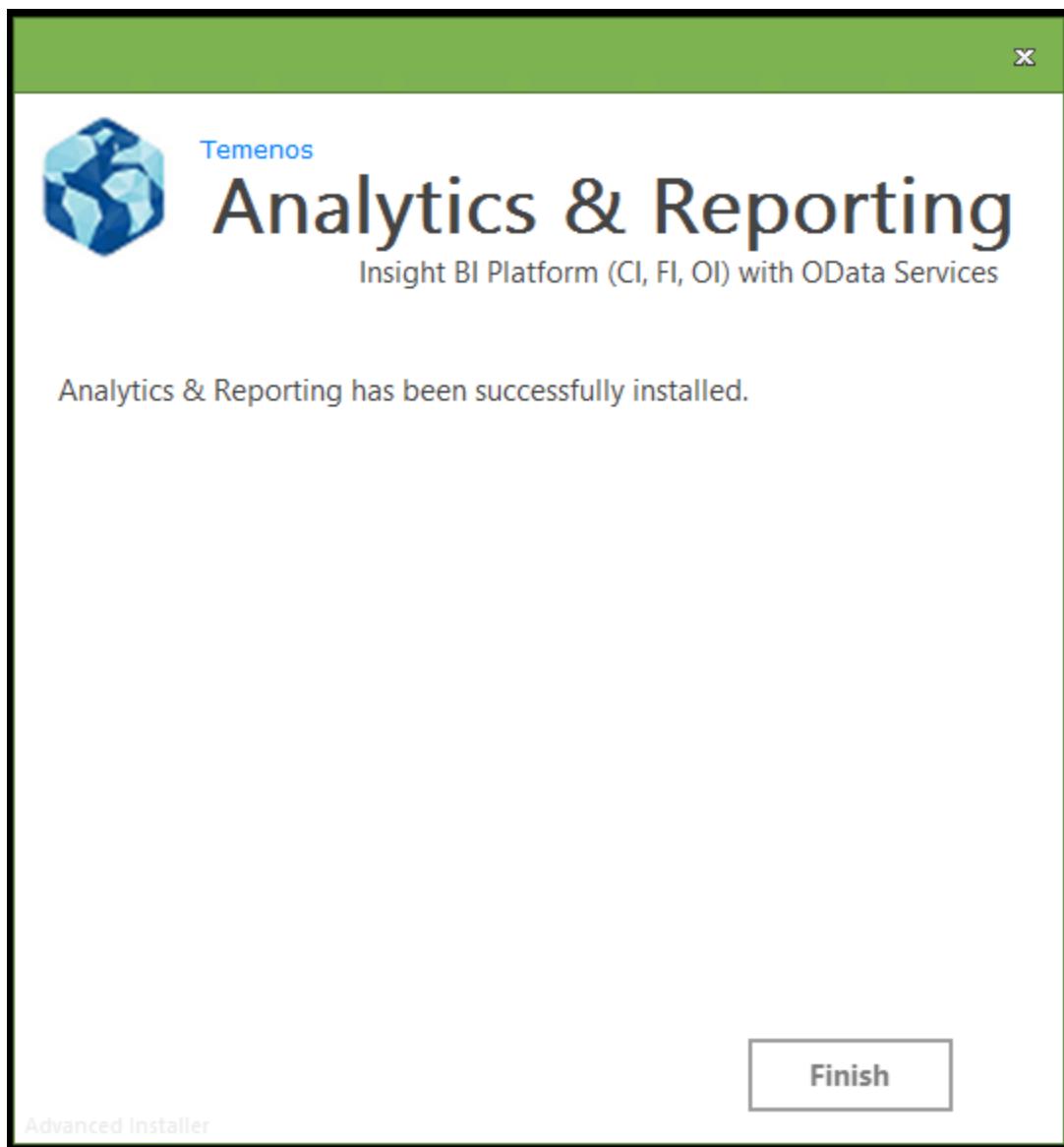
The Ready to Install Dialog is the last one before the execution of the Installer. This dialog shows you a summary of the components that were selected and will be installed. At this point you can click the Back button to update any settings you entered, or you can click on the Install button to proceed.



The installer will extract all the necessary files for the installation and will be installing the corresponding components. Depending on the performance of the server and the selected components to install this could take from 15 minutes to 45 minutes, especially for a single server installation.

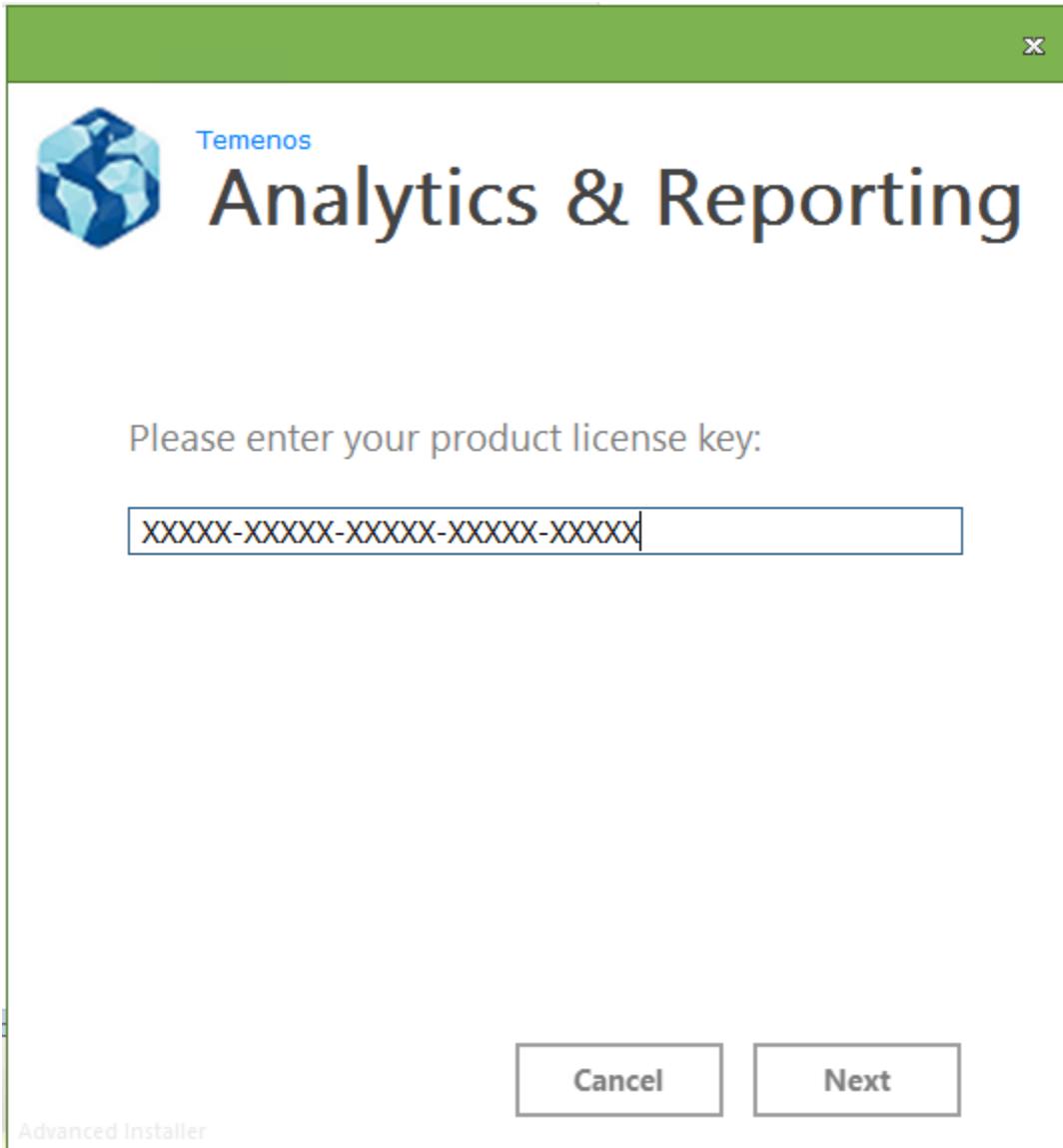


After the installation has been done you will see the final dialog and then you can click Finish.



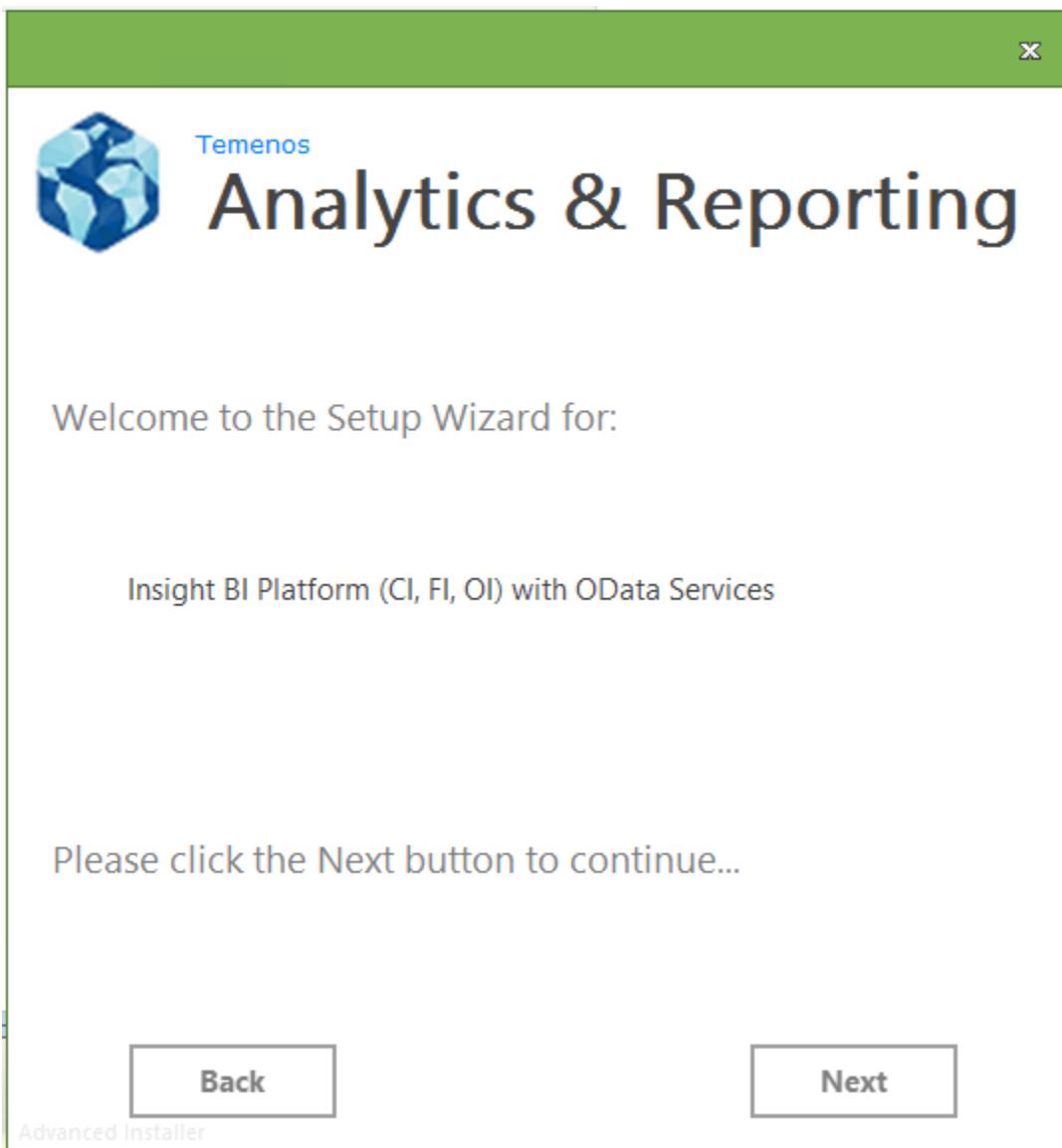
## Application Server

Run the Insight\_R16\_Setup.exe installer on the Application Server you would like to install. The first dialog will ask you for the product license key. You should have gotten this key from distribution, if you have not please talk to the project manager.



Enter the product license key and click the Next button.

The installer validates the product license key and takes you to the welcome dialog.



Click Next to continue.

The Features Dialog shows all the different components that you can install. For the Application server installation you can select the IIS components, Insight Application, Insight OData Services and Insight Data Manager as shown below.

Note, depending on the product license key some of the components may not be available.



Click Next to continue

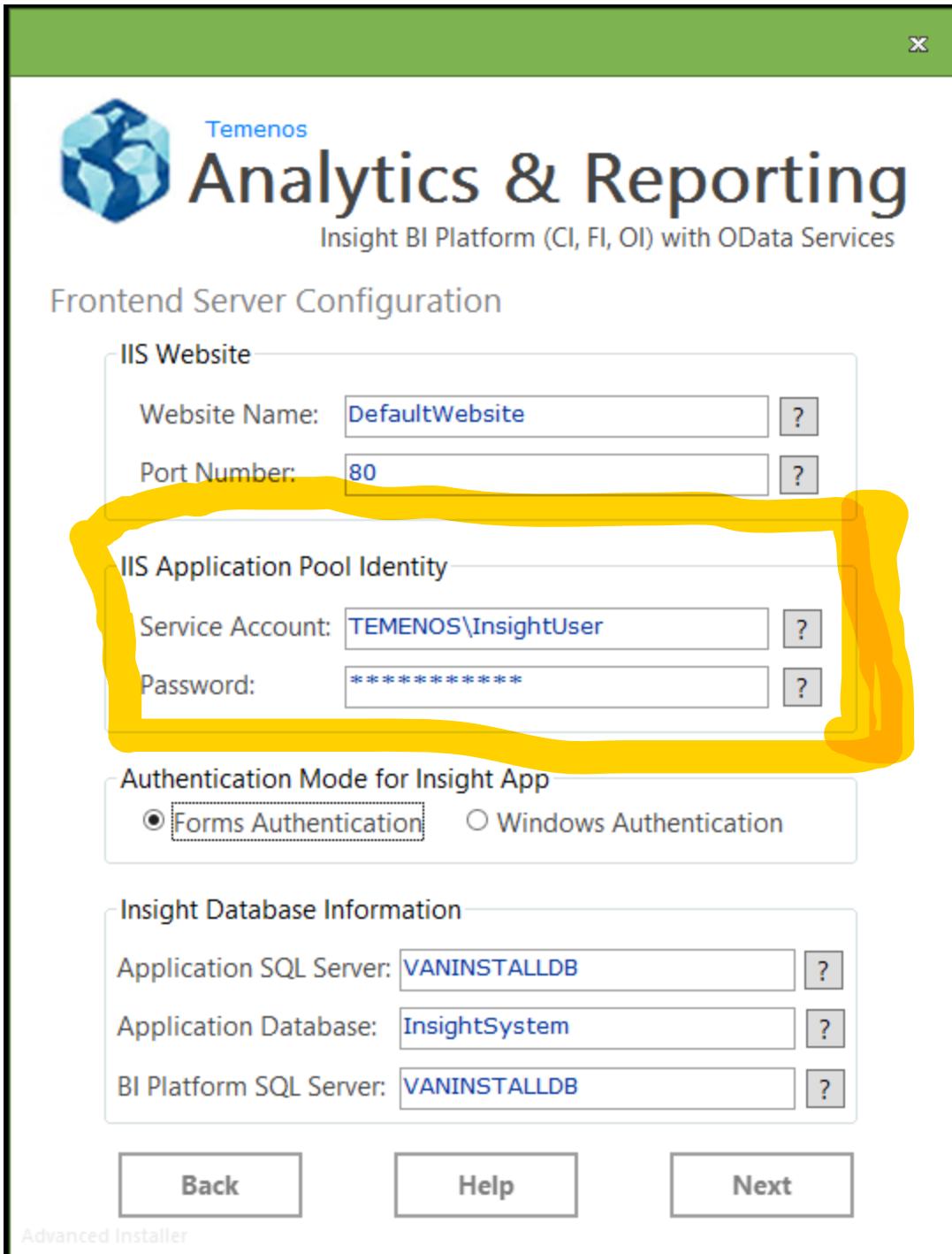
The Frontend Server Configuration dialog is where you will specify the necessary information to create both web applications, the Insight Application and the Insight Data Manager.

The IIS Website section allows you to enter the website name and port number. The Default Website in IIS uses port 80. You can leave as is, or change the name and port number if you would like to use a different website.

For the IIS Application Pool Identity section use the Domain service account for Insight (Insight Service Account) this service account is the one mentioned in the prerequisites with access to the different insight databases. This account will be used as the identity of the application pool for these two web applications. You also need to enter the password for the service account.

In this dialog you also specify the authentication mode you would like to have for the Insight Application, select one of the radio buttons, Forms Authentication or Windows Authentication.

In the Insight Database Information section you will need to enter the name of the Application database, which is normally defaulted to InsgihtSystem, and the name of the SQL server where this Application database exists. Also need to provide the name of the SQL server where the Insight BI Platform databases are located.



Click Next to continue.

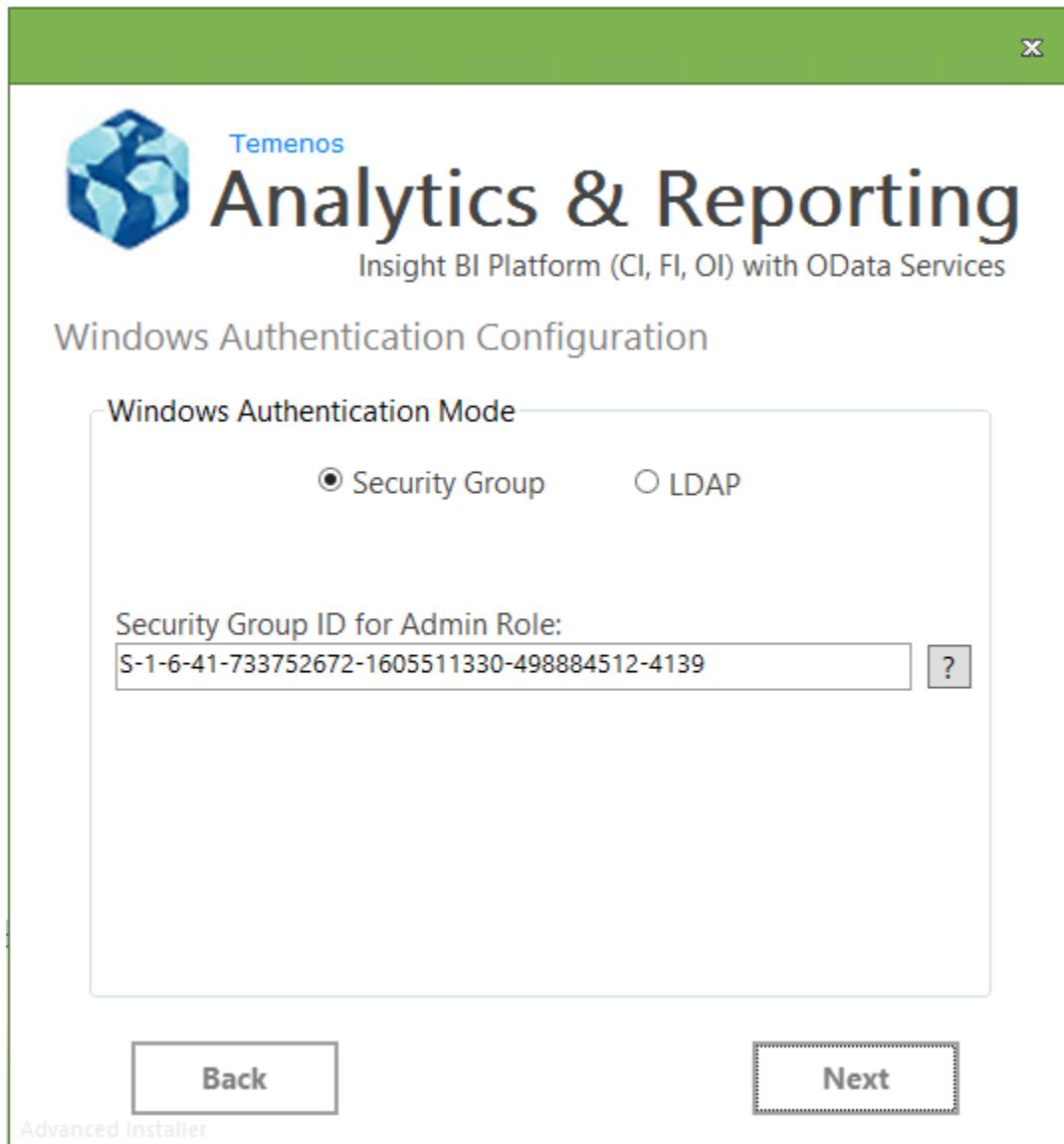
## Windows Authentication

If you selected Windows Authentication in the previous dialog then you will be prompted with the Windows Authentication Configuration dialog.

There needs to be an Active Directory group, designated to connect with the Admin role in the application. More Active Directory groups can be connected with the application later.

The Insight Application supports two ways to do Windows Authentication, one by providing the Security Group ID for the Admin Role or by providing credentials to query the Active Directory via LDAP.

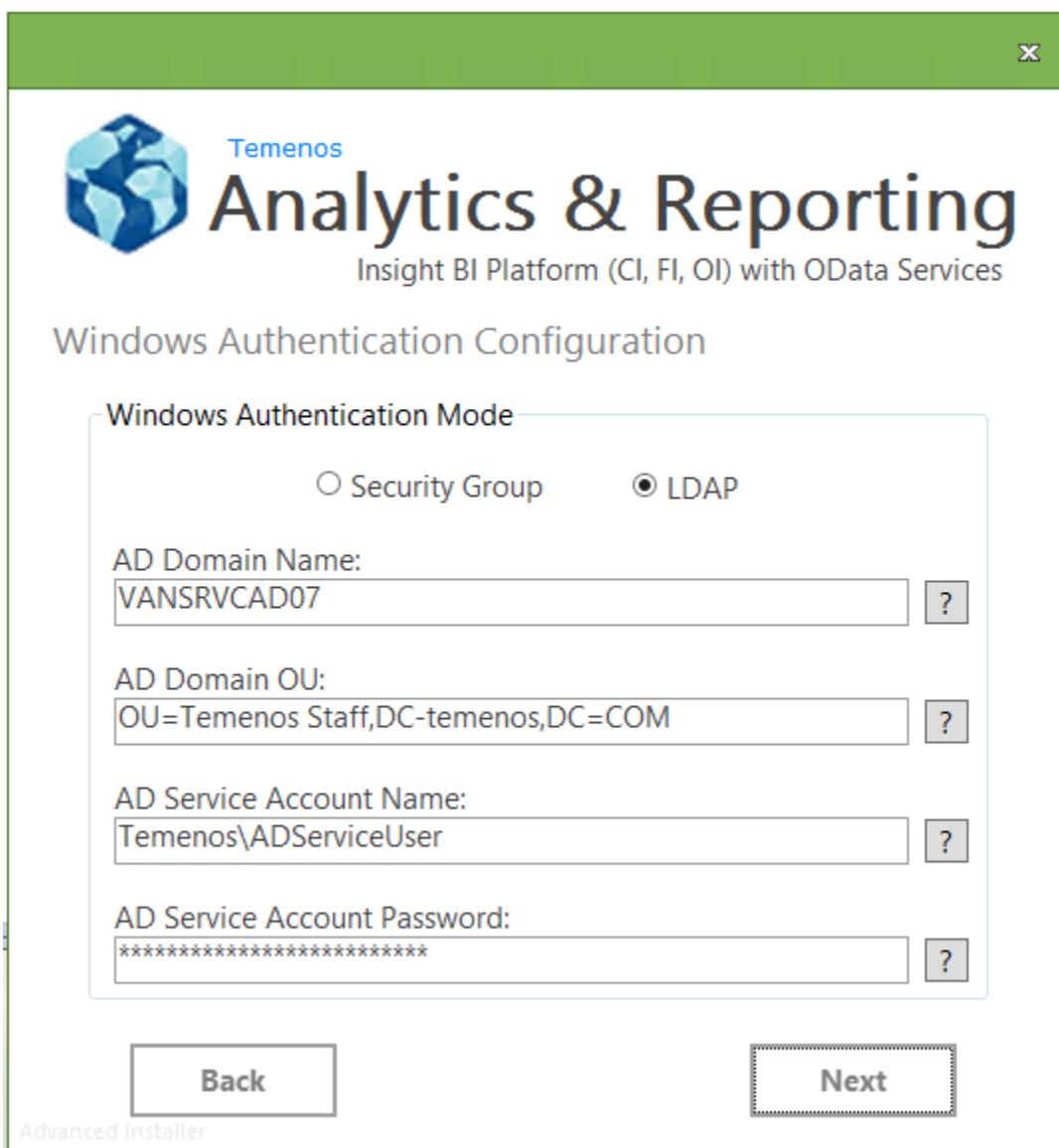
If the Security Group radio box is selected, then you just need to provide the Security Group ID for the Admin Role, you will need to contact your Active Directory expert to be able to provide you with this ID.



If you select the LDAP radio button then you will be prompted to enter information so that the application can query the Active Directory information for each user that tries to use the application. Such as the AD Domain Name, the Domain OU (Organizational Unit).

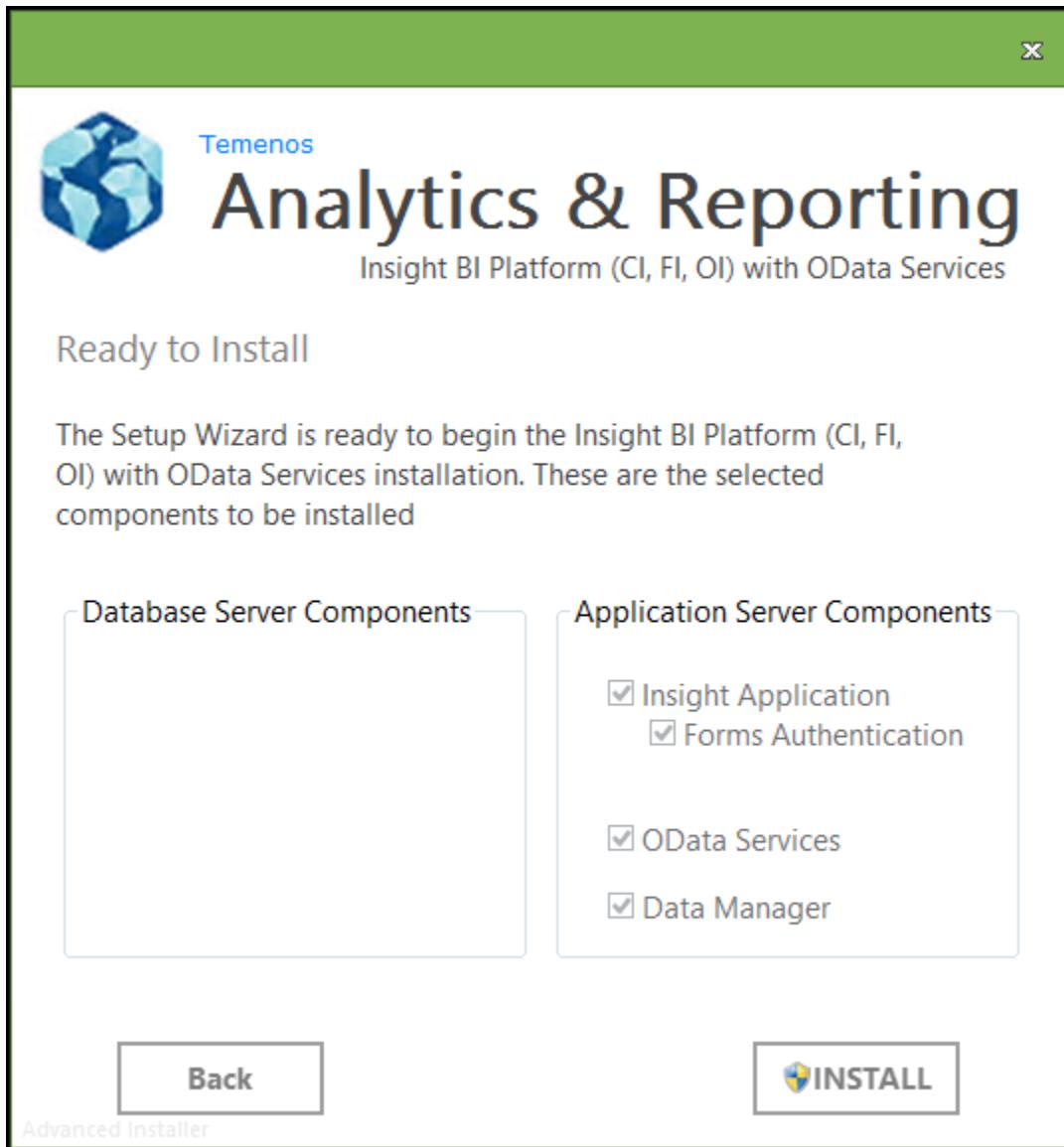
The AD Service Account Name is where you enter a domain account that has enough privileges to query Active Directory for the authentication of the users as well as querying what groups the user belongs to. You also need to provide its password, so that the Insight Application can use all these components to query the Active Directory Server.

This AD Service Account should have query access to the Active Directory Server, it could be a different account as the Insight Service account mentioned above for the Application Pools, or the same one, as long as it has query rights to query Active Directory.

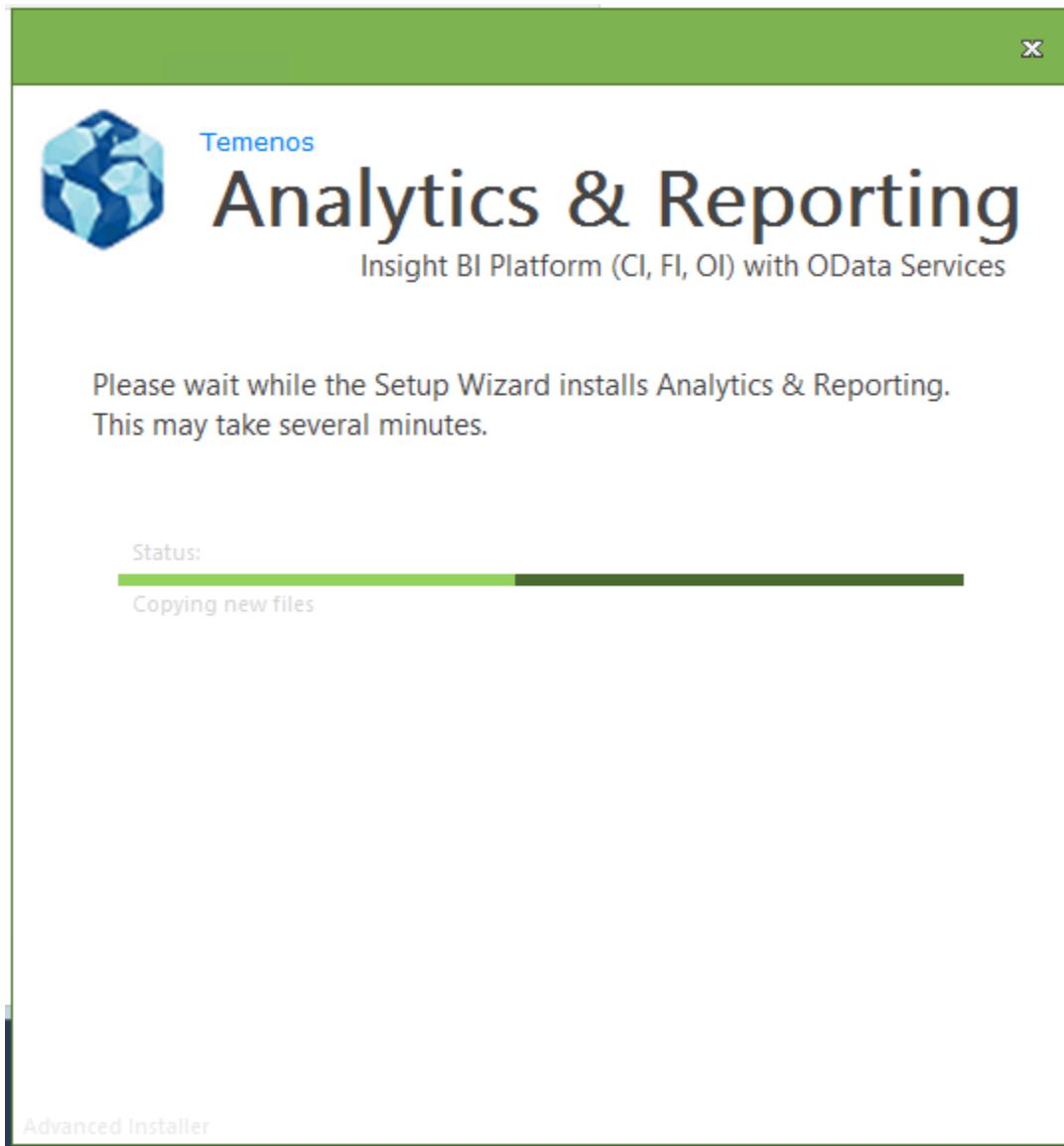


Click Next to continue.

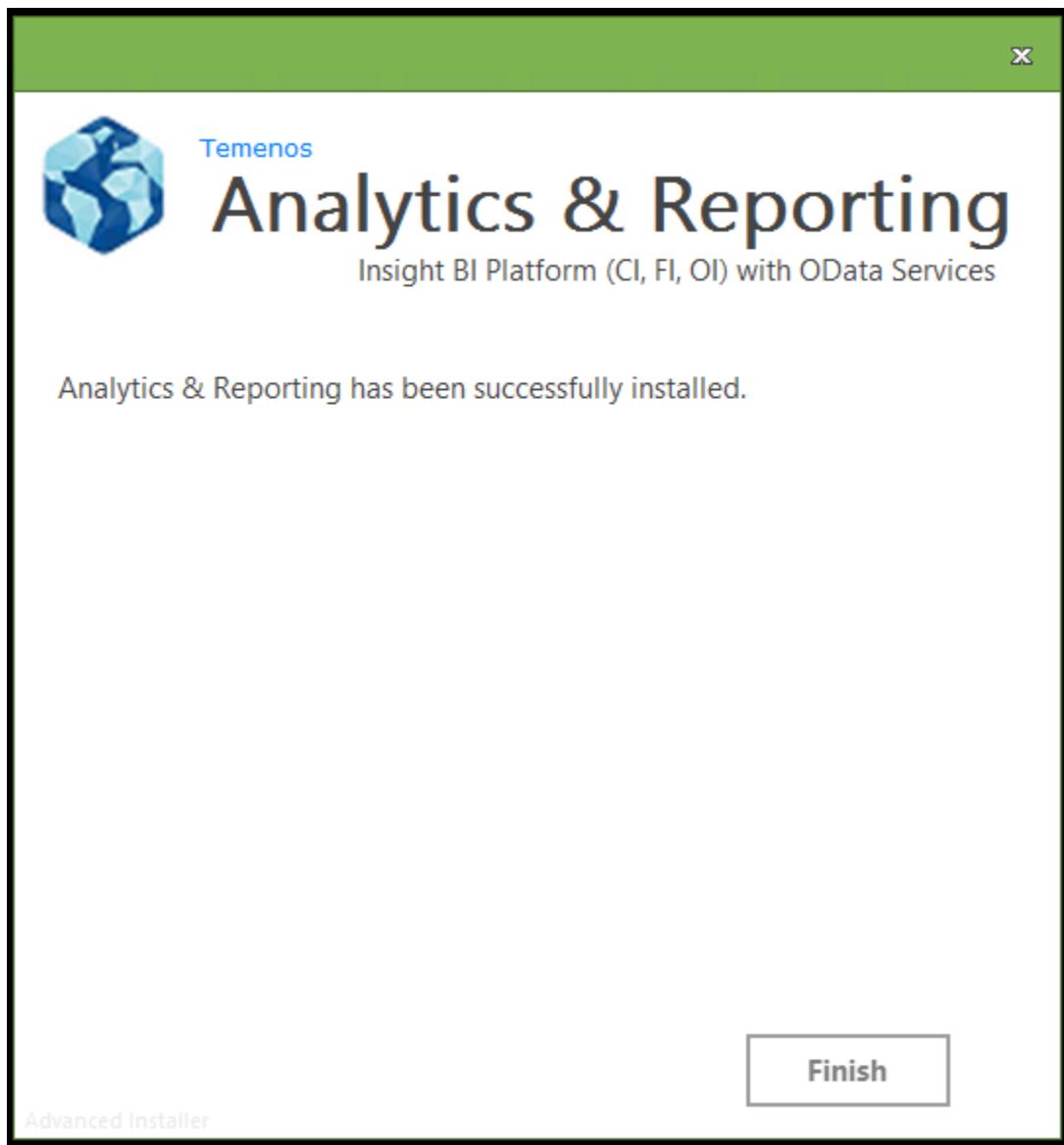
The Ready to Install Dialog is the last one before the execution of the Installer. This dialog shows you a summary of the components that were selected and will be installed. At this point you can click the Back button to update any settings you entered, or you can click on the Install button to proceed.



The installer will extract all the necessary files for the installation and will be installing the corresponding components. Depending on the performance of the server and the selected components to install this could take from 15 minutes to 45 minutes, especially for a single server installation.



After the installation has been done you will see the final dialog and then you can click Finish.



## Minimum Permissions Required

For Forms Authentication, all resources required by the application will be accessed through the account entered in the Installer as the IIS Application Pool Identity.

For Windows Authentication, all resources will either be using the IIS Application Pool Identity, or the currently logged in user, depending on the Impersonation setting in the web.config file:

```
<identity impersonate="true"/> (default)
```

Access will be based upon the currently logged in user. It is recommended to use the usual best practice of assigning permissions to resources, to groups, rather than to individual users.

```
<identity impersonate="false"/>
```

Access will be based upon the account entered in the Installer as the IIS Application Pool Identity.

So, for the account in question, the following minimum permissions are required to run the application:

- There are no special permissions required for the file system.
- In SSRS, the account needs Browser permissions on the Home (root) folder in SSRS. This is the lowest permission that SSRS has, to view folders and reports.
- There is no need to go to "Site Settings" on the upper right; just the Folder Settings for the Home folder.

... and then database permissions:

<u>Database</u>	<u>Permissions</u>	<u>Purpose</u>
InsightWarehouse	db_datareader, db_executor	Customer data
InsightMasterData	db_datareader	Translations on reports
InsightSystem	db_datareader, db_datawriter, db_executor	Application functionality
InsightStaging	db_datareader	For Data Warehouse Performance QA report
InsightLanding	db_datareader	For some Admin reports
InsightWarehouseOLAP cube	Member of Cube User role	Analysis reports

For the Insight Data Manager, db\_datareader and db\_datawriter are required for InsightMasterData.

## Test the Installed components

After the single server or multi server installation has completed you can proceed to test the functionality.

### Running ETL

On the SQL server where the Insight BI Platform databases were installed you can look at the Insight ETL Job under SQL Agent Jobs.

Click on the properties of the job and edit the first step "Insight Base Tables" and update the DW.EXPORT path parameter for the s\_Import\_Control stored procedure to match the folder where the DW.EXPORT extract files are located.

Once is saved, you can start the Job from step 1 to start running the ETL.

When the ETL finishes you should have data in all the Insight Databases including the insight Warehouse. The job also process the Insight Cubes.

## Testing the Insight Application

In order to test the Insight Application, make sure that the service account user configured for the Application pools, has privileges on the Insight Databases, described in the pre-requisites section.

Open up an Internet Explorer browser and type <http://ApplicationServerName/InsightApplication> and you should be able to see the login page. If you entered a different port number in the installation dialogs, include it in the link above.

If you selected Forms Authentication you will see the login page and you can now enter the user name and password. Note, your user name will be [admin@Temenos.com](mailto:admin@Temenos.com) based on the examples above, or the value you entered in the Email Domain field on the Insight Application Backend Configuration dialog.

Then in the password field enter: “password” all lowercase without the quotes. This is the default password. If you enter the user name and password correctly you will be prompted to change your password, and after that you will be able to see the home page with the reports menu on the left pane.

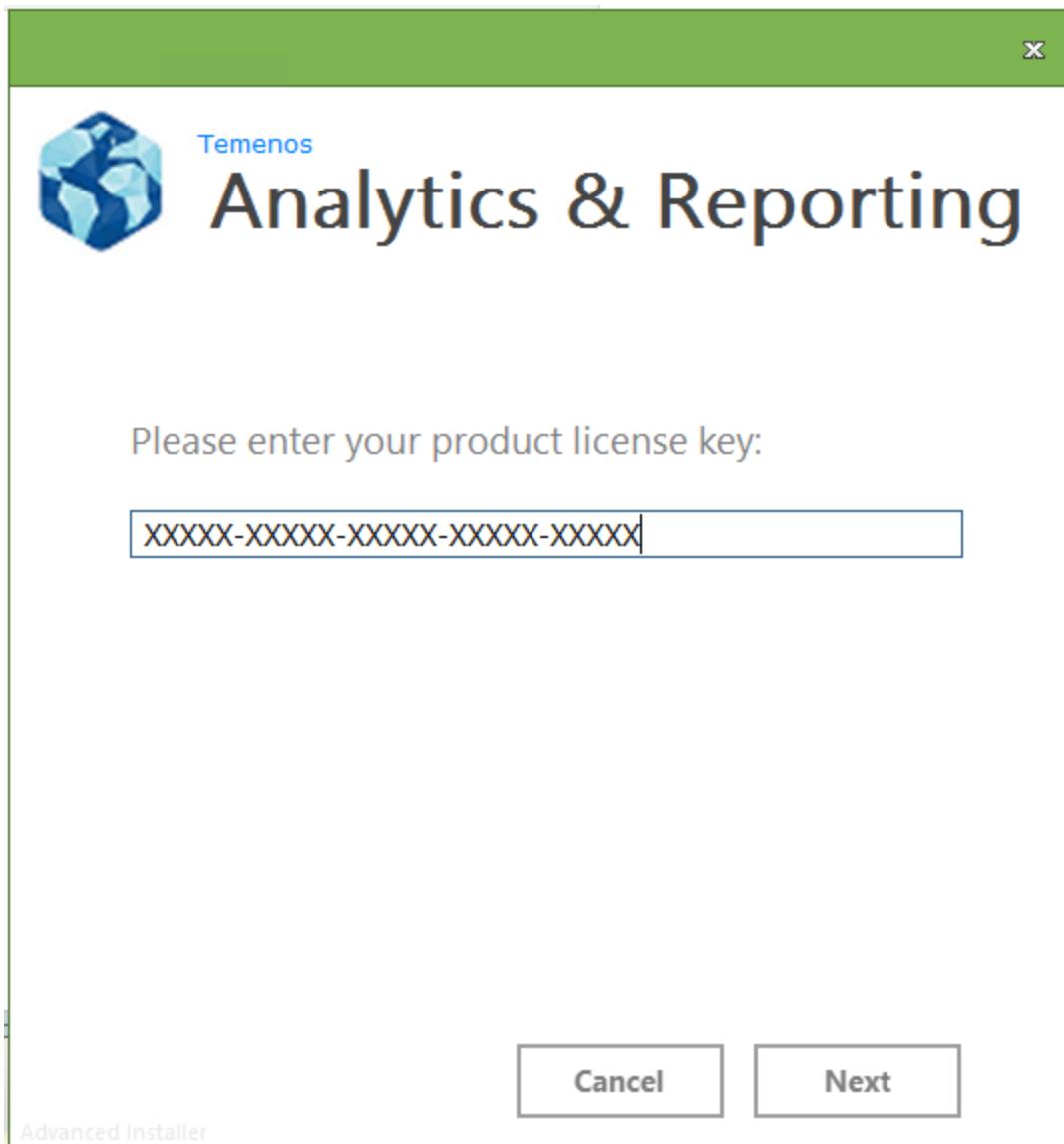
If you selected Windows Authentication and your user belongs to the Insight Application Admins group, you should be able to see the home page with the reports menu on the left pane

If you have already processed the ETL and have data in the Insight Warehouse and Cubes then you should be able to run all reports.

If you deployed the Insight OData Services, in the Insight Application, go to Application Settings and add the ODataServiceUri value. \*\*\*\*\*

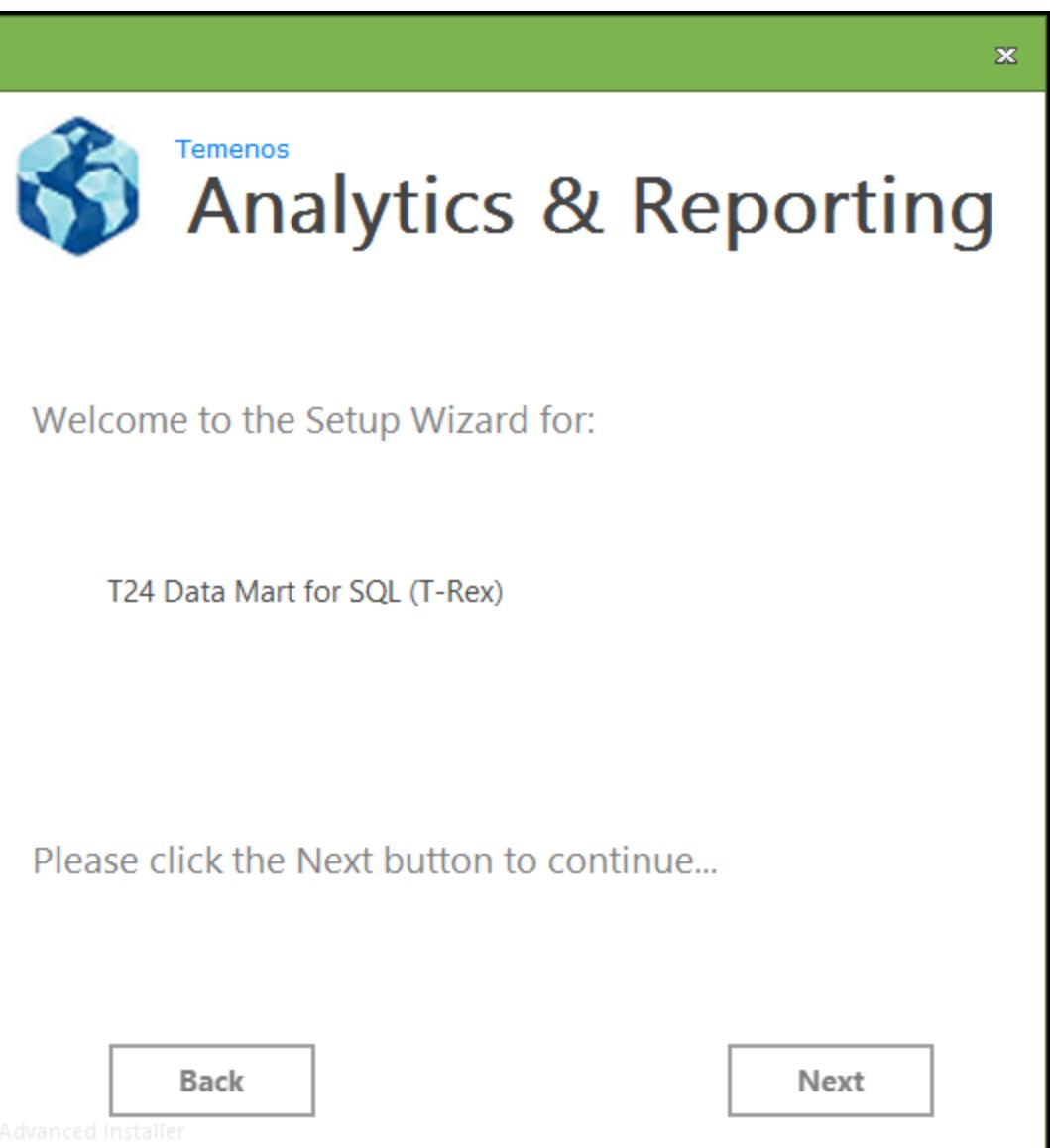
## APENDIX A - T24 Data Mart for SQL (T-Rex) Installation

Run the Insight\_R16\_Setup.exe installer on the server you would like to install. The first dialog will ask you for the product license key. You should have gotten this key from distribution, if you have not please talk to the project manager.



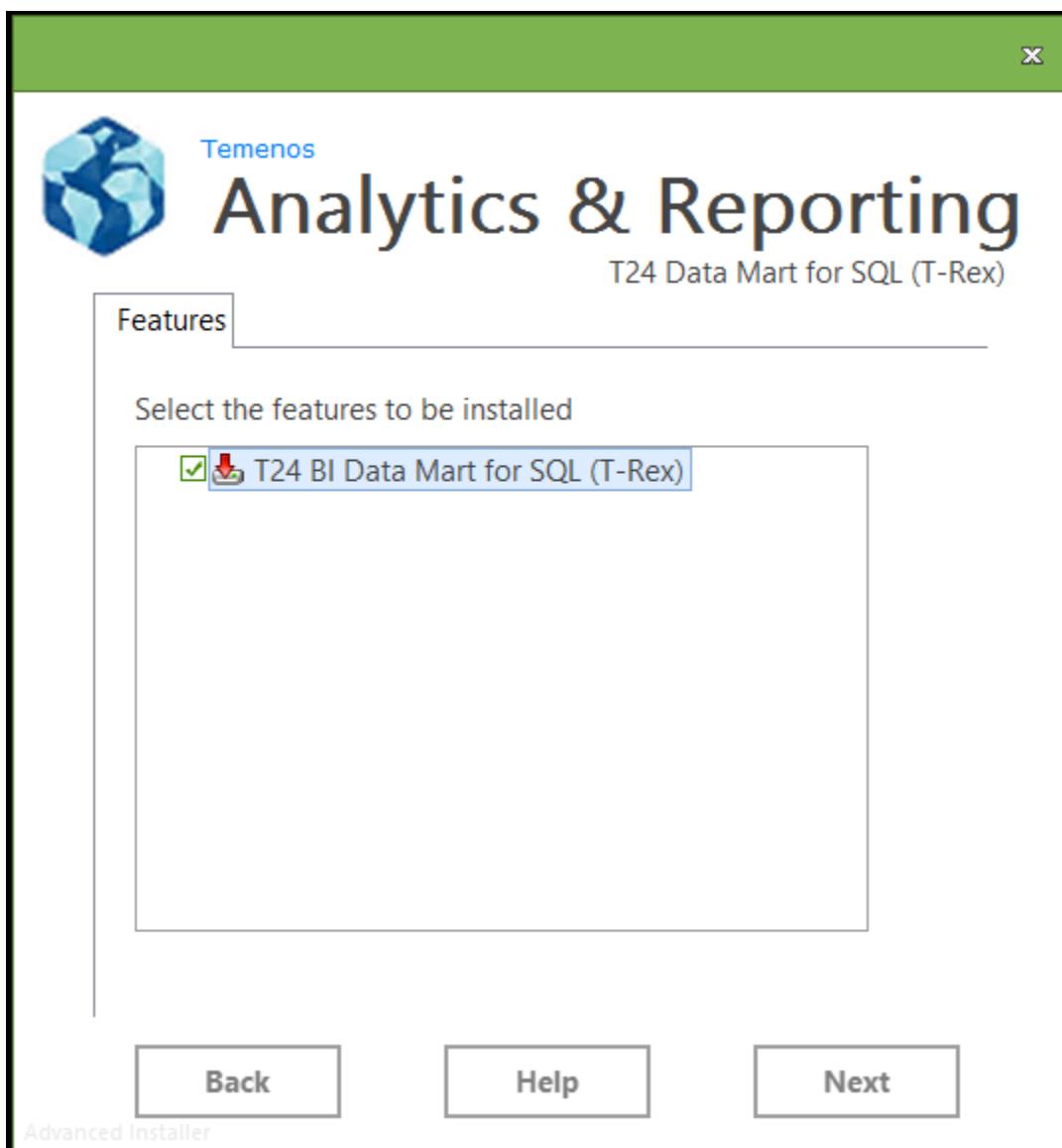
Enter the product license key and click the Next button.

The installer validates the product license key and takes you to the welcome dialog.



Click Next to continue.

The Features Dialog shows the T-Rex component to install.



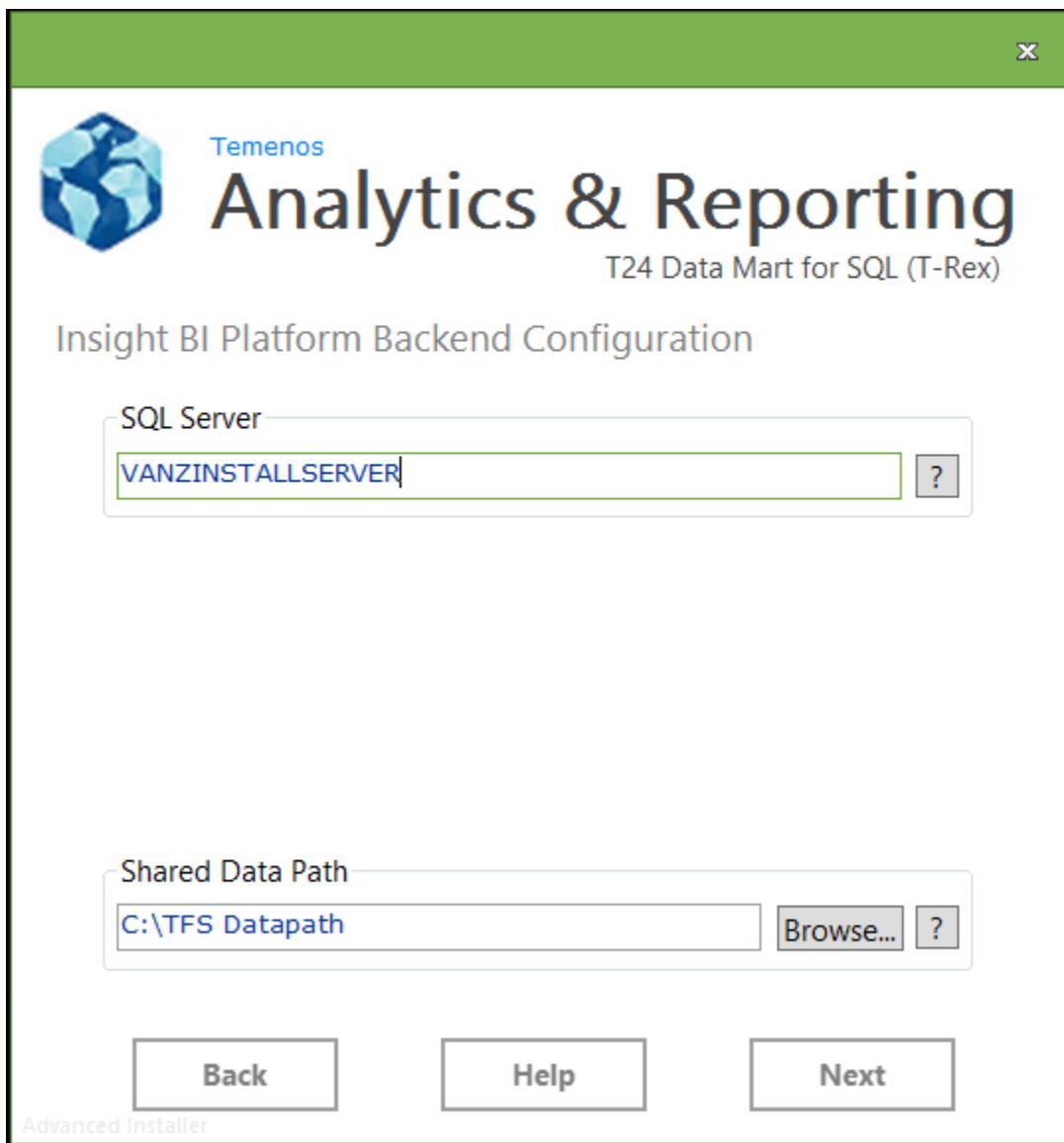
Click Next to continue

The Insight BI Platform Backend Configuration dialog is where you will be entering the information about the server where you will be installing the Insight BI Platform databases for T-Rex.

Note, if you are installing these components in a named instance in SQL Server, please provide the instance name when applicable. For example, for SQL Server (SERVERNAME\INSTANCENAME).

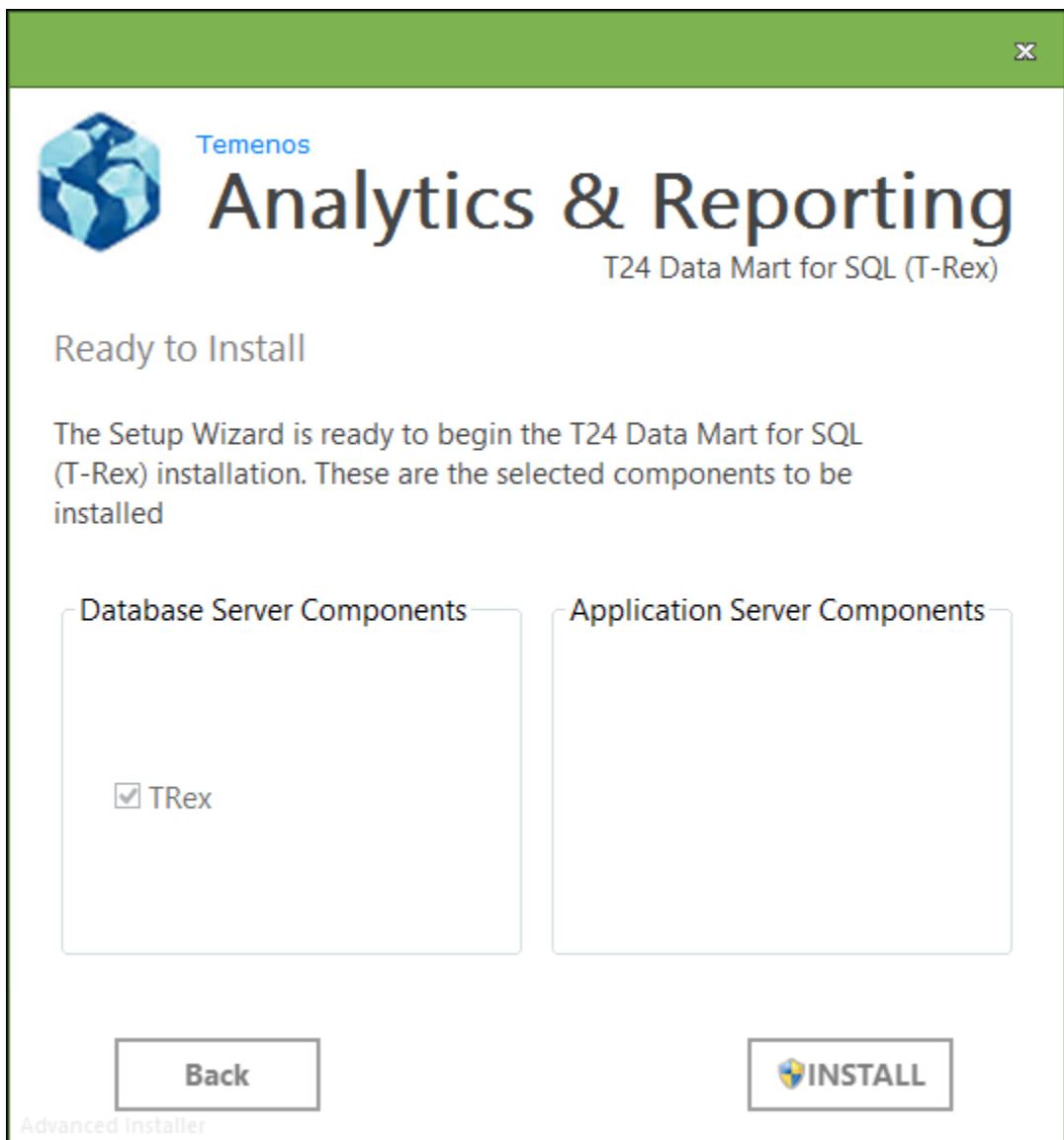
In this dialog you also need to provide the Shared Data Path where the xml data file will be located when deploying the Insight BI Platform databases. You can just create a local folder on the server where the user running the installer have read and write privileges. For example “C:\TFS DataPath”.

Make sure that the folder is valid and via the Browse button you can select it.



Click on the Next button.

The Ready to Install Dialog is the last one before the execution of the Installer. This dialog shows you a summary of the components that were selected and will be installed.



Click Install to proceed with the installation.

The installer will extract all the necessary files for the installation and will be installing the corresponding components. Depending on the performance of the server and the selected components to install this will take a few minutes.



After the installation has been done you will see the final dialog and then you can click Finish.

