Business Intelligentsia

QUICK AUDIT XI

Business Intelligentsia

Administrator's Guide

QUICK AUDIT XI

Administrator's Guide

Version 3.1 – November 2009

Index

Overview

What We Mean by "Deployment"

By deployment we mean the distribution, installation and integration of Quick Audit XI application, repository and reporting and tools within a network infrastructure.

Initially offered for use in a standalone solution, Quick Audit XI can now be deployed and used over the intranet, in conjunction with BusinessObjects XI. This means that you can access BusinessObjects XI CMS information via standard BusinessObjects documents and universes. Additionally, documents can be automatically scheduled and distributed to users using BusinessObjects XI.

Each deployment is different. How your deployment is structured and configured depends on the number of users supported, the type of information you want to report on, the number and types of databases you're using, the geographical distribution of your company, and so on.

A Standard SQL Reporting Configuration to audit BusinessObjects XI CMS

Security information related to a **BusinessObjects XI** deployment is stored on a repository called **CMS**.

Querying and extracting data from this **CMS** require the use of the **BusinessObjects Query Builder** or **SDK**. Both solutions do not allow the BusinessObjects administrator to access the data is an easy and standard way.

Quick Audit XI is a simple and fast way to extract the data from the **BusinessObjects XI CMS**, store them in clear format in a database and make them available via a standard universe.

Reporting on the CMS becomes much easier and available to more users.
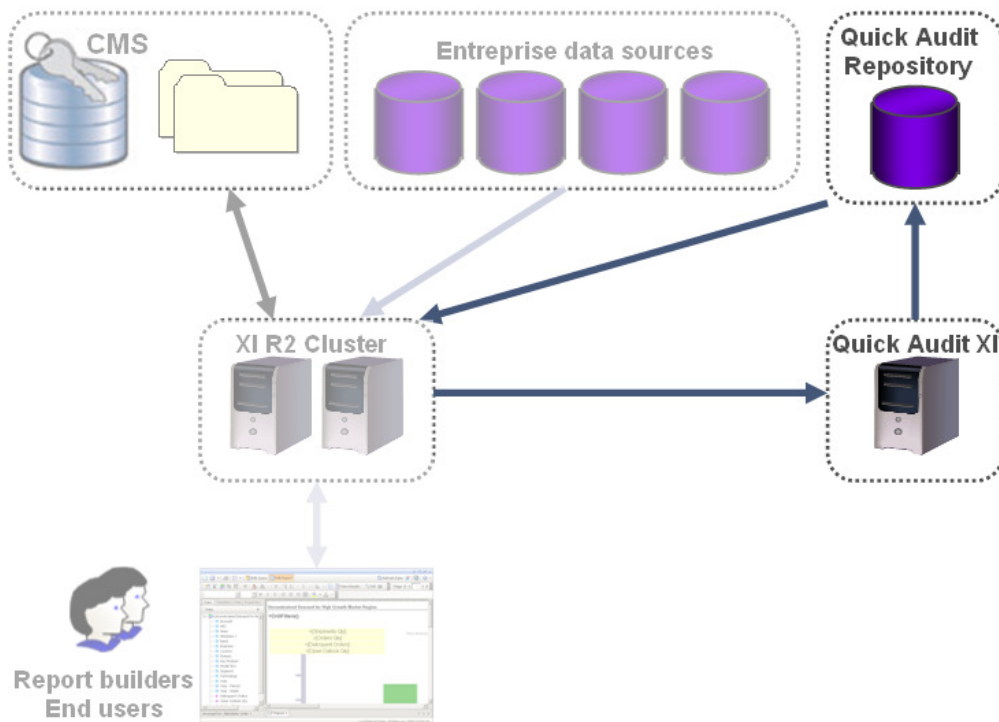
A Standard SQL Reporting Configuration via Quick Audit XI

4

Architecture

The key elements for Quick Audit XI are:

- Your BusinessObjects XI deployment with an access to the information you wish to extract. It is advised to use an administrator account if you wish to extract all information from the CMS.

- Quick Audit XI application installed on a desktop computer or server running Windows 2000, 2003 or XP.

- Quick Audit XI repository hosted on a database (RDBMS). The database engines currently supported are Oracle, MySQL and MS-SQL server. Other ANSI92 database may be used but are not supported

- A reporting system such as BusinessObjects XI to access the Quick Audit XI repository. A set of universes and sample reports for BusinessObjects XI are provided with Quick Audit XI application

Note: Quick Audit XI will connect to BusinessObjects XI CMS and transfer data to its repository (target database). It is advised to install and run Quick Audit XI near these elements.

Deployment

Prerequisites

Quick Audit XI requires a **BusinessObjects XI R2/R3 Enterprise** instance as "source of data". Quick Audit XI will connect to BusinessObjects XI CMS using an administrator account or account with view rights to all objects.

Quick Audit XI requires a repository database where CMS data will be stored. Quick Audit XI support Oracle, MS-SQL server and MySQL database. Licence free versions of these databases are available on the Quick Audit XI package. Full versions of these databases are of course supported.

Other type of database should not cause any problem as long as they comply with ANSI92 standard and provide a standard ODBC driver, but are not supported.

Quick Audit XI will run on the following Operating systems:
- Windows 2000 Workstation, Server and Advanced Server
- Windows 2003 Server and Advanced Server
- Windows XP Home and Professional Edition

Quick Audit XI requires **Microsoft .NET Framework 2.0** to be installed. If not present, Quick Audit XI setup will ask you to download and install it from Microsoft.

Platform reference

All issues related to Quick Audit XI will have to be reproduced on any of these following platforms:

QuickAuditXI versions	BusinessObjects	Operating System	Quick Audit XI Repository Database
Version 3.0.x	All versions of BusinessObjects XI R2 SP2	Windows XP Home or Professional Edition Windows 2000/2003 Server	Oracle 10 Oracle XE 10 MS SQL Server 2000 MS SQL Server Express 2005 MySQL Server v5
Version 3.5.x	All versions of BusinessObjects XI R3	Windows XP Home or Professional Edition Windows 2000/2003 Server	Oracle 10 Oracle XE 10 MS SQL Server 2000 MS SQL Server
Version 2.x	All versions of BusinessObjects XI R2	Windows XP Home or Professional Edition Windows 2000 Server	Oracle 10 Oracle XE 10 MS SQL Server 2000 MS SQL Server
Version 1.x	All versions of BusinessObjects XI R2	Windows XP Home or Professional Edition Windows 2000 Server	Oracle 10 Oracle XE 10 MS SQL Server 2000 MS SQL Server

Note: version 1.x and 2.x are not covered by this documentation.

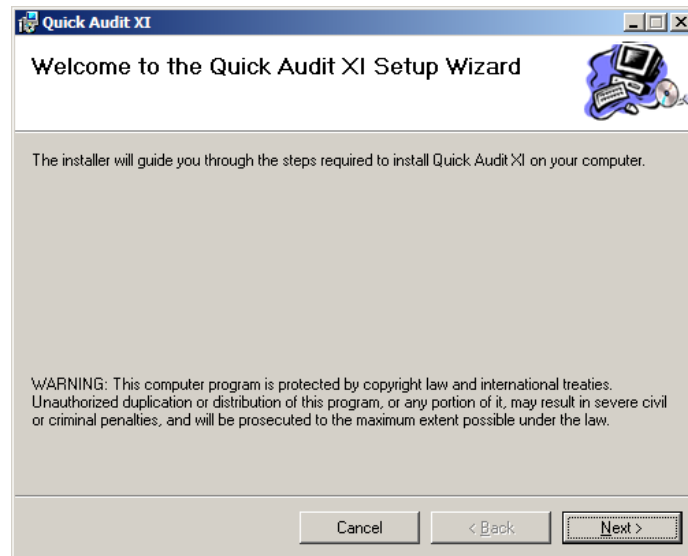**Note:** version 3.0.x is available under the folder "QuickAuditXI for R2"
Note: version 3.5.x is available under the folder "QuickAuditXI for R3"

Installation of Quick Audit XI

Note: An update from a previous version of Quick Audit XI will follow the same steps

Run "setup.exe" from the Quick Audit XI package or CD to start Quick Audit XI installation.
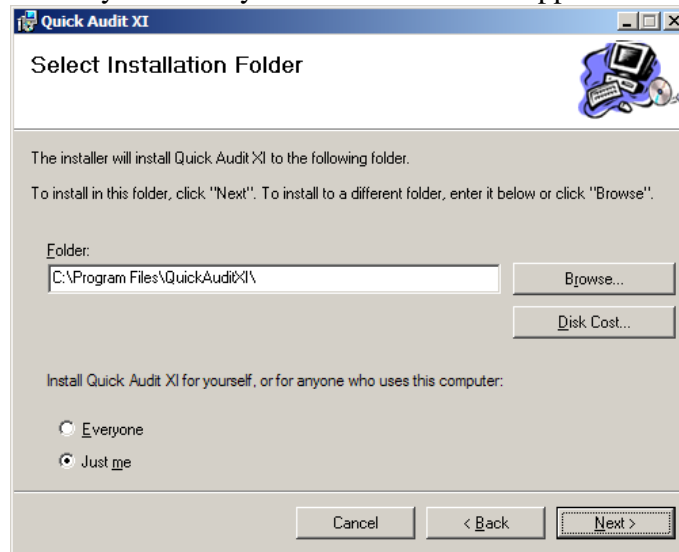

Click on the "Next" button to continue the setup

Review the license agreement and select "Agree", and then click on the button "Next" to continue

The next screen will ask you where you want to install the application:

Default location is the C drive or the drive where program are installed by default. You can change the location as you wish. This location is where the main executable file will be placed.

You will need to know this location if you wish to schedule Quick Audit XI to extract CMS data via the Windows scheduler (see page 25 for more details).
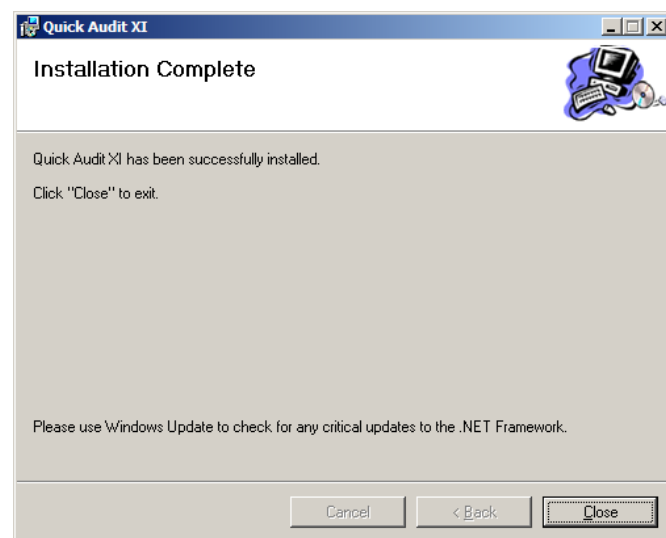
Click "Next"
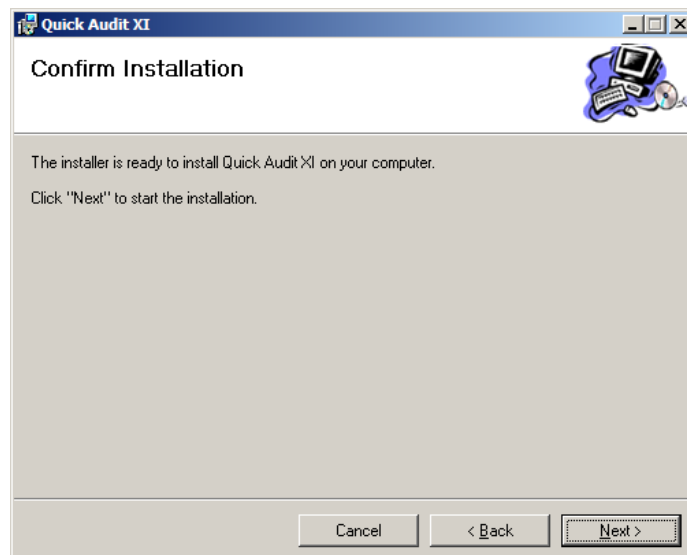
The setup is now ready to install Quick Audit XI. Click "Next" to start the installation.

9

The installation should only take few minutes:
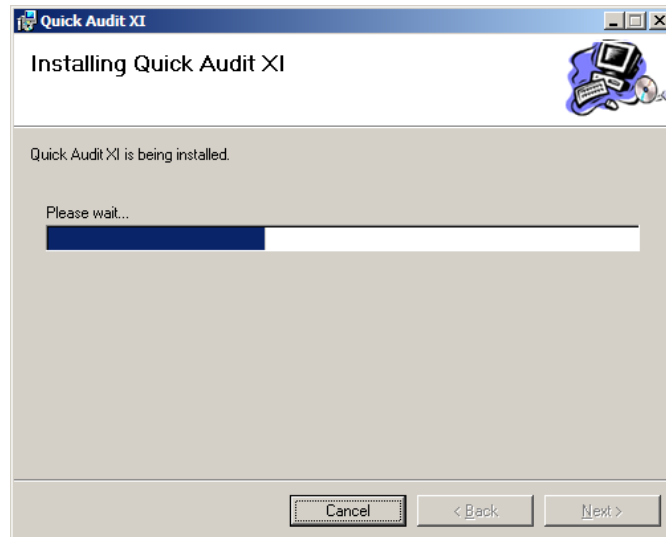
Once the application has been installed, click on "Close" to exit the setup.

You can now launch Quick Audit XI from the start menu

Quick Audit Repository database and ODBC setup

You can use an existing database or install a new database to store Quick Audit XI data as long as the database is one of the supported databases (See page 7 for more details). This section is only required if you are exporting data to an ODBC database. See page 16 on how to select ODBC target during the export.

See "Annexe A" on page 28 for more details about the license free databases provided with Quick Audit XI package.

Quick Audit Repository Database Account

Quick Audit XI will require a database user and password with the following rights:
- Create and delete tables
- Insert and Update rows
- Query data
- User TRUNC and DELETE statements

Quick Audit Repository ODBC connection setup

Quick Audit will access its repository database using an ODBC driver. You need to create a new DSN entry in the ODBC Data source Administrator. These steps will give you an overview on how to setup this DSN entry:

- Go to the menu **Start>>Settings>>Control Panel>>Administrative Tools>>Data sources (ODBC)**
- Select the type of DSN you wish to use. "System DSN" is the most commonly used.
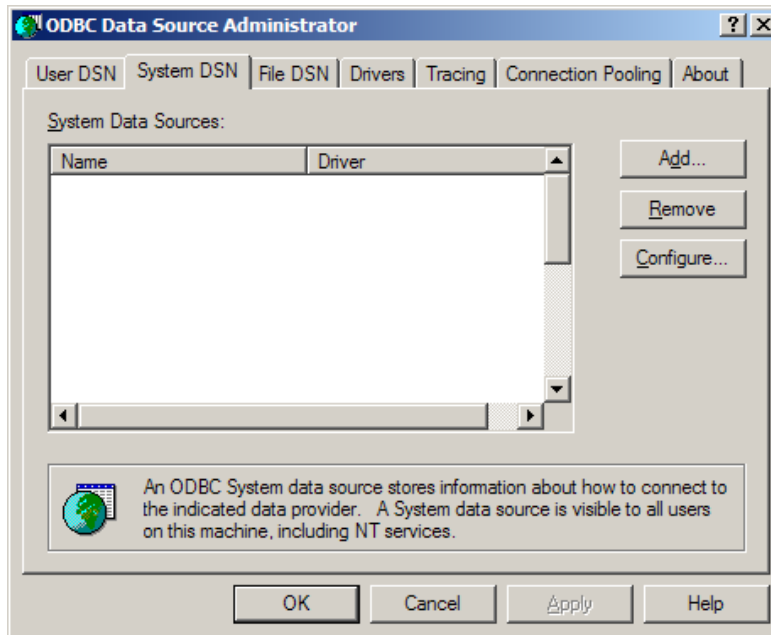
- Click on the button "Add…" to add a new DSN. The next dialog box will ask you to select the driver.
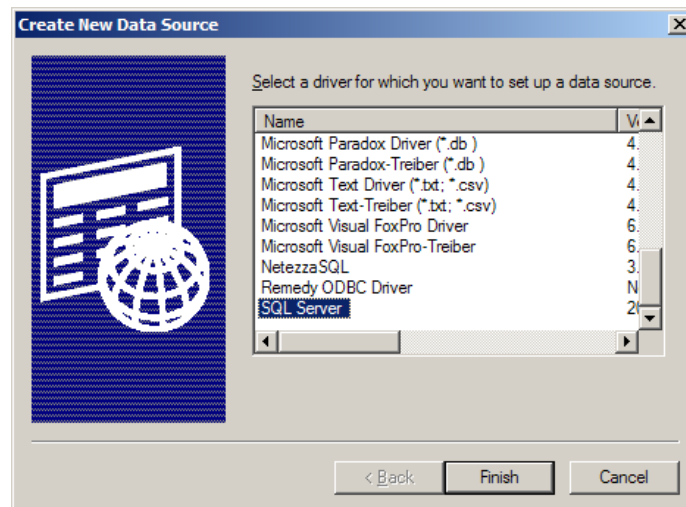
- Select the driver that matches your database (Oracle, SQL Server or MySQL).
- Click on finish

The rest of the steps will depend of the driver and database you are using. Most drivers will ask you to enter the host name or server name where the database is running, the user name (database account) and sometimes the password. Some will require more information. You need to refer to your database provider for more details.

Launching the application

Go to the menu
Start >> Programs >> Business Intelligentsia Tools >> Quick Audit XI

The application will start and display the main dialog box:

Production registration

Quick Audit XI will allow you to export data from the CMS without registration key. But this mode will limit the number of actors to 50 and the number of objects to the same proportion.

If your BusinessObjects deployment contains 150 users/groups and 600 objects, only the first 50 users and groups will be exported plus the first 200 objects.

Click on "Register" to display the registration dialog.
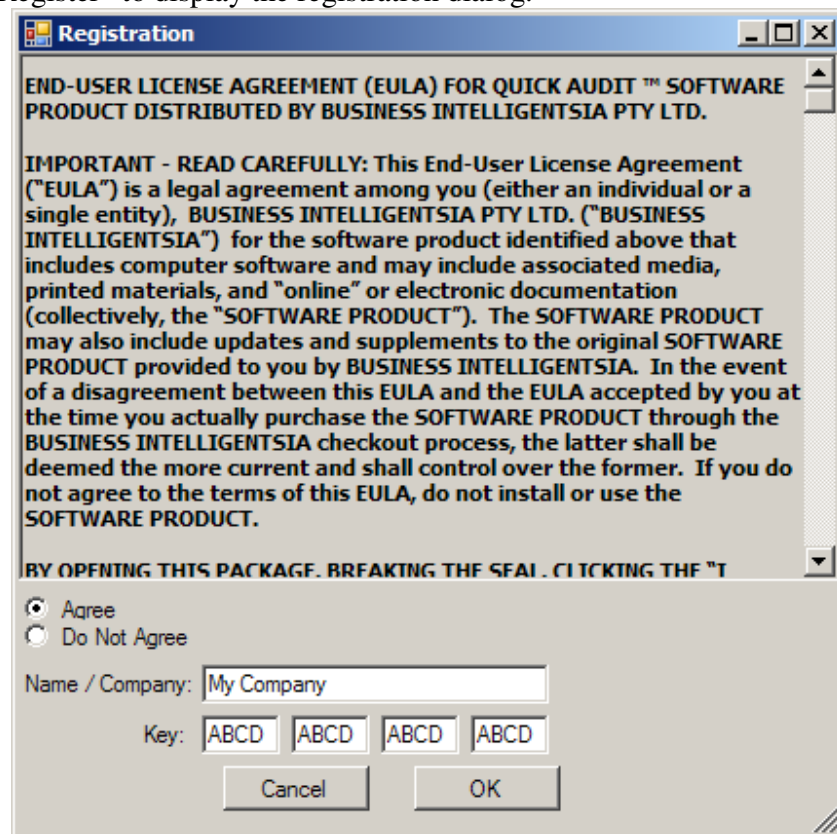
You must agree with the license agreement, enter the key and the company to whom this key belongs to.

Then click "OK" to validate your registration.
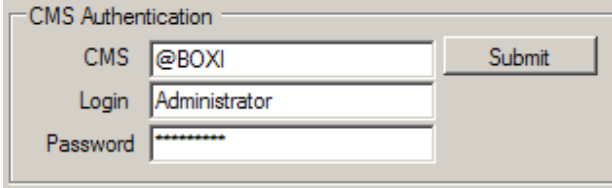
CMS authentication

Before exporting anything, you must enter the CMS authentication parameters and submit them.

The authentication method for Quick Audit XI is "Enterprise"

If you never logged into the CMS (using Designer or Desktop intelligence) from your computer, you may get an error message.

The BusinessObjects account used by Quick Audit XI must have the right to log on the CMS and view the objects you wish to export. To export all objects' information, you should use an administrator account.

Click on Submit to validate the authentication. If the authentication to the BusinessObjects CMS is valid, a session will be open and summary information will be displayed.

You must click on "Submit" in order to select and export CMS data.

Export to RDBMS database (ODBC)

Quick Audit XI will export CMS data to a RDBMS (database) via an ODBC connection.
Supported databases are Oracle, MS-SQL Server and MySQL. Other ANSI92 databases
should not cause any problems, but are not supported.
See page 11 for more details on the ODBC setup

Database test and setup

Under the "Export Target" section, tick the option "Export to ODBC database" and enter
the ODBC DSN, the user and password to connect to the database:

Click on "Test" to make sure the connection parameters are correct.

When you first use Quick Audit XI on a new target database, you need to create the
tables' structure that will store the CMS data.

To do that, click on the "Setup" button to open the "Target Database Setup":

- **Test Tables** will check if the table structure is correct.
- **Create Tables** will run the script to create the table structure. Run this script to
  configure a new target database for Quick Audit.
- **Purge Tables** will erase all data from any previous exports
- **Delete Tables** will delete all tables used by Quick Audit XI
- **Update Tables** will update the table structure from a previous version of Quick
  Audit XI

16

Then, press "Test Tables" button:

- If a previous version of the table structure for Quick Audit XI is found, you will need to Update it with the "**Update Tables**" button

- If an existing version of the table structure for Quick Audit XI is found, you can leave it as it is, purge the table or delete the tables to start from new or remove Quick Audit XI tables

- If no table structure for Quick Audit XI is found, you can create one with the "**Create Tables**" button

In order for the export to work, a test should display "The database structure is valid"

Click the "OK" button to leave this dialog box

Limitations in ODBC database Export

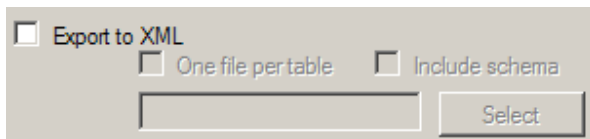- Export to a database can take a lot of time. Many insert will be executed on the database. The more objects and users you have, the longer it will take to export. The speed of your network between you and the database must be as fast as possible to improve the speed.

- Fields will be limited to 1000 characters. This could have an impact on the universe Meta data: for example derived tables with very long SQL definition.

Export to XML

Under the "Export Target" section, tick the option "Export to XML" and enter a valid path.

- The option "One file per table" will split the XML into multiple files like the CVS export.
- The option "Include schema" will add the table schema into the XML data.

Limitations in XML Export
- XML format can get very big as many tags are added to the data you are exporting.

Export to CSV

Under the "Export Target" section, tick the option "Export to CSV" and enter a valid path.

Multiple file will be generated in the selected path. The number will depend on the selected item you export.

Limitations in CSV Export
- Fields will be limited to 1000 characters. This could have an impact on the universe Meta data: for example derived tables with very long SQL definition.

18

Select objects to export

You are now ready to select the objects you wish to export. Under the "Select Objects to export" section, choose the objects to be exported.
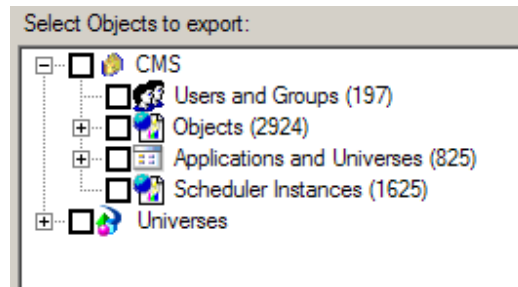
CMS Objects information export

CMS: Objects information from the CMS will be exported.

Users and Groups are all information and relation related to BusinessObjects users and groups defined in the CMS

Objects are all CMS objects available via Infoview: WebIntelligence reports, Desktop Intelligence reports, Crystal reports, Folders, Categories, etc…
Checking the rights for these objects will export the relation between the objects and users/groups

Application and Universes are all CMS objects the make Infoview: WebIntelligence, Desktop Intelligence, Universes, Connection, etc…
Checking the rights for these objects will export the relation between the objects and users/groups

Scheduler Instances are all instance information related to scheduled objects

Note: Exporting any of these CMS information will erase any previous exported data except the summary snapshot and detailed export (Universes)

19

Universe metadata export

Universes is listing universes found on your CMS. Unfold and select the universes you wish to export. This option will export the universes' metadata (table, join, objects, classes, conditions, etc…). Exporting universes' metadata takes time and should only be used on few universes at the time.

You can select all or few universes from the tree. The more you select the longer the export will take. Selected universes will be imported, opened and parsed.

Do not use Designer application while Quick Audit is exporting universes' metadata.

Note: Exporting universes' metadata will erase any previous exported universes' metadata. CMS and summary snapshot will not be erased.

Desktop Intelligence Document metadata export

DeskI Documents is listing all the Desktop Intelligence documents found on your CMS. Unfold and select the documents you wish to export. This option will export the documents' metadata (data providers, objects, conditions, variables). Exporting documents' metadata takes time and should only be used on few documents at the time.

You can select all or few documents from the tree. The more you select the longer the export will take. Selected universes will be imported, opened and parsed.

Do not use Designer and Desktop Intelligence applications while Quick Audit is exporting documents' metadata.

Note: Exporting DeskI documents' metadata will erase any previous exported documents' metadata. CMS and summary snapshot will not be erased.

Web Intelligence Document metadata export

WebI Documents is listing all the Web Intelligence documents found on your CMS. Unfold and select the documents you wish to export. This option will export the documents' metadata (data providers, objects, conditions, variables). Exporting documents' metadata takes time and should only be used on few documents at the time.

You can select all or few documents from the tree. The more you select the longer the export will take. Selected universes will be imported, opened and parsed.

Note: Exporting WebI documents' metadata will erase any previous exported documents' metadata. CMS and summary snapshot will not be erased. Access to the File Store folder is required. Make sure you can access this location from the workstation running Quick Audit XI or it will give an error.

Exporting the data

Click on the button "Start" to initiate the export.

The progression bar will give you details of the export.
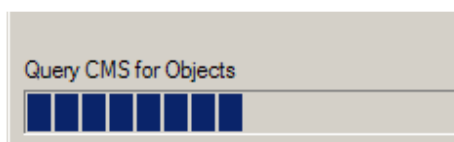
A log file will be created in the Quick Audit XI folder in case an error occurs during the export.

Exiting Quick Audit XI

All parameters such as CMS authentication, Target database and registration key are saved while the application is closed.
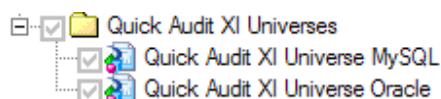
Quick Audit XI report samples

Quick Audit XI comes with a set of universes and sample reports for various target databases. If you choose to export the CMS data to an ODBC database, you can use these samples.

These samples are available in the Quick Audit XI package under the folder "Sample Reports" in a BIAR file.

The BIAR file contains the following:

> - A universe's folder called "Quick Audit XI Universes" that contains universes for Oracle, MSSQL and MySQL.

> - An object's folder called "Quick Audit XI Reports" that contains samples reports based on the universes provided.

You can publish some or all samples to your BusinessObjects instance. These samples are free to use and modify.

To publish these samples, use the BIAR file provided with the BusinessObjects Import Wizard. Refer to the BusinessObjects documentation to find out more about the Import Wizard tool.

After publishing the sample universe for your target database, you must import it using Designer and edit the connection. The connection parameters such as "User Name", "Password" and "Service" must be modified for your own target database definition.

Then export the universe back to the CMS in the same folder.

Command Line and schedule

Command lines allow you to run Quick Audit XI in silence mode and/or preset export parameters.

Command line can be combined with Windows "Scheduled Tasks" function to automatically export CMS data on a schedule basis.

The command line will not allow you to export detailed universes' metadata.

Command line parameters

Command	Description
-e	Start the export
-c	Close the application when export done
-sec	Export Users and Groups
-obj	Export CMS objects' information
-objs	Export CMS objects' information with their rights
-app	Export CMS applications' information
-apps	Export CMS applications' information with their rights
-unv	Export all universes' metadata
-deski	Export all Desktop Intelligence documents' metadata
-webi	Export all Web Intelligence documents' metadata
-xml=xxxxx	Provide the path for the export into xml format
-csv=xxxxx	Provide the path for the export into csv format
-cmssys=xxxxx	Provide the CMS system name
-cmsuser=xxxxx	Provide the CMS user's login
-cmspwd=xxxxx	Provide the CMS user's password
-dsnname=xxxxx	Provide the DSN ODBC name
-dsnuser=xxxxx	Provide the DSN ODBC user login
-dsnpwd=xxxxx	Provide the DSN ODBC password
-logall	This option will log all activities on a log file. By default, only errors are logged onto a log file
-nolog	This option will stop all log to be generated, including errors

Command Line Examples

Example 1: export users, groups and Infoview's objects information with rights to a database known as "exportdb":

```
"C:\Program Files\QuickAuditXI\Quick Audit XI.exe" -e -c -
sec -objs -dsnname=exportdb -dsnuser=user -dsnpwd=password
```

Example 2: export all CMS information for your development and production instance using a batch file:

- Create a file called "**CMS export dev and prod.bat**"
- Edit this file and enter these two lines:

```
"C:\Program Files\QuickAuditXI\Quick Audit XI.exe" -
cmssys=@BOXIDEV -cmsuser=bo__admin -cmspwd=xxxx DEV_DB  -
dsnuser=BO_AUDIT -dsnpwd=BO_AUDIT -sec -objs -apps -e -c

"C:\Program Files\QuickAuditXI\Quick Audit XI.exe" -
cmssys=@BOXIPROD -cmsuser=bo__admin -cmspwd=xxxx PROD_DB  -
dsnuser=BO_AUDIT -dsnpwd=BO_AUDIT -sec -objs -apps -e -c
```

- Save the BAT file and run it

Quick Audit will export CMS data twice. First time from a development BO instance to a development target database and second from a production BO instance to a production target database

Using "Scheduled Tasks" from Windows to schedule an export

Using the Windows scheduler will allow you to run Quick Audit XI at specific time, to export data from the BusinessObjects CMS to a selected target database. You can schedule a snapshot export on a weekly basis to keep a history of the changes in your CMS, get a trend of the number of users by group for example.
In the same time, you can schedule a daily export to run your day to day audit reports.

To create a scheduled export, go to **Start>> Settings>>Control Panel>>Scheduled Tasks>>Add a Scheduled Task**

The "scheduled Task" wizard will take you through the creation of the task.
Click Next
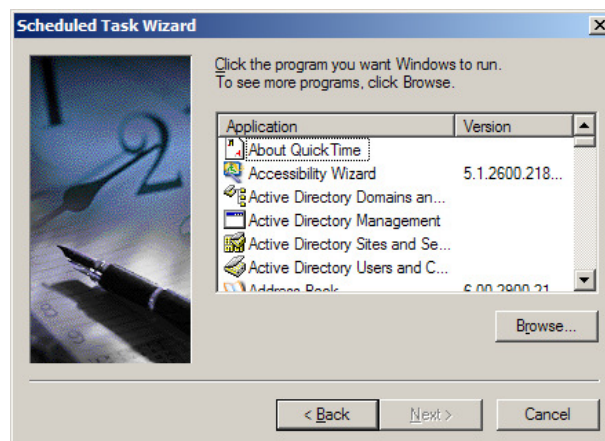
Click on the "Browse" button to select Quick Audit XI program.
Select "Quick Audit XI.exe" under **C:\Program Files\QuickAuditXI**

Select the name of the Scheduled Task and the recurrence:

Then select when you want the task to start:

Provide the NT user who will run the task:

Check the option "Open Advanced properties" then click on "Finish":

Now, you can edit the schedule and add the command line parameters:
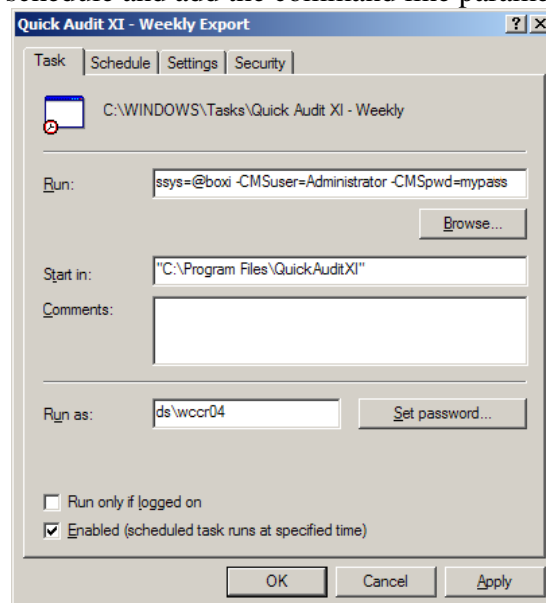
In the "RUN" field, add the command line parameters you wish to use.

For example:
```
-e -c -sec -objs -apps -dsnname=exportdb -dsn -dsnuser=user
-dsnpwd=password
```

… to export all users/groups and all objects with rights information to the target database.

You can schedule Quick Audit XI as many times as you want. For example to export CMS data from your development instance and production instance using different target database.

Annexe A – License free database

You will find in Quick Audit XI package a folder called "Databases" containing license free databases. Quick audit XI has been tested with these databases. They are free to use for testing Quick Audit XI or as an alternative to commercial databases.

Note that these databases may have limits in size or commercial usage. Refer to their provider for more details.

Oracle Express

http://www.oracle.com/technology/products/database/xe/index.html

Oracle Database 10g Express Edition (Oracle Database XE) is an entry-level, small-footprint database based on the Oracle Database 10g Release 2 code base that's free to develop, deploy, and distribute; fast to download; and simple to administer. Oracle Database XE is a great starter database for:

Developers working on PHP, Java, .NET, XML, and Open Source applications
DBAs who need a free, starter database for training and deployment
Independent Software Vendors (ISVs) and hardware vendors who want a starter database to distribute free of charge
Educational institutions and students who need a free database for their curriculum
With Oracle Database XE, you can now develop and deploy applications with a powerful, proven, industry-leading infrastructure, and then upgrade when necessary without costly and complex migrations. Read what users say about Oracle Database XE.
Oracle Database XE can be installed on any size host machine with any number of CPUs (one database per machine), but XE will store up to 4GB of user data, use up to 1GB of memory, and use one CPU on the host machine.

MySQL

http://www.mysql.com/

The MySQL® database has become the world's most popular open source database because of its consistent fast performance, high reliability and ease of use. It's used on every continent -- Yes, even Antarctica! -- by individual Web developers as well as many of the world's largest and fastest-growing organizations to save time and money powering their high-volume Web sites, business-critical systems and packaged software -- including industry leaders such as Yahoo!, Alcatel-Lucent, Google, Nokia, YouTube, and Zappos.com.

Not only is MySQL the world's most popular open source database, it's also become the database of choice for a new generation of applications built on the LAMP stack (Linux, Apache, MySQL, PHP / Perl / Python.) MySQL runs on more than 20 platforms including Linux, Windows, OS/X, HP-UX, AIX, Netware, giving you the kind of flexibility that puts you in control.

Whether you're new to database technology or an experienced developer or DBA, MySQL offers a comprehensive range of certified software, support, training and consulting to make you successful.

Annexe B – Update Information

What's new since version 1

- Desktop Intelligence and Web Intelligence documents (reports) metadata is now exported. Information such as data provider, universe, objects/classes, and variables are available via the Quick Audit XI universes.
  This new functionality allows you to list all reports that uses universe X and/or object Y.

- A new parameter **–deski** allows to export all Desktop Intelligence documents' metadata while running in command line mode.

- A new parameter **–webi** allows to export all Web Intelligence documents' metadata while running in command line mode

What's new since version 2

- Many bugs are fixed
- Export to CVS and XML format is now available.
- Export is quicker
- Snapshot feature has been remove