

# Adaptive Planning

## **Express Edition Installation and Upgrade Guide**

**for Release 5.5**

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## 1. System Requirements

### **Servers**

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The server is the system on which the Adaptive Planning software is installed.

#### ***Minimum Hardware Requirements***

Processor: Intel (x86), 2GHz for small installation. Recommend Dual CPU, 2GHz+.

Memory: 2GB RAM for small installation to 6GB for 100+ users.

Disk space: 5GB for small installation rising to 5 Disk Drive (73 GB drives sufficient) for 100+ users.

#### ***Operating System***

Windows XP Professional: Service Pack 2 or higher

Windows 2003

SuSE Linux 10.x

#### ***Database***

You may use your existing Oracle 10gR2 installation.

Alternatively, you may use Oracle Database 10g Express Edition for small budget models. This is included with Adaptive Planning's Windows installer; for Adaptive Planning Express installations for Linux, you may download Oracle Express from Oracle.

#### ***Backup***

*Be sure to establish a backup procedure for the Adaptive Planning data in your Oracle database. Always perform a full backup before upgrading.*

See the section "Final Configuration of the Installed System" for suggested resources.

#### ***Other Software***

The Java Runtime Environment must be installed on your computer before the installer can be launched. You can obtain the JRE from Sun at <http://java.sun.com/j2se/index.jsp>

You must install Perl on the server running the Adaptive Planning application in order to perform upgrades of the application.

ActivePerl is available from <http://www.activestate.com> as a free download. We recommend the latest release, which at this time is 5.10.0.1002. To download, go to <http://www.activestate.com> and click on the "Downloads" link in the upper right. Then click on ActivePerl under Language Distributions (get Get Current Release).

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## Client

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The client is the desktop system from which an individual user runs their browser. It connects to the server machine which is running the Adaptive Planning software.

### *Minimum Hardware Requirements*

Processor: Intel (x86), 1GHz  
Memory: 512MB

### *Software Requirements*

Windows operating system  
Internet Explorer 6.0 or greater or Firefox 3.0.5 or greater. In addition, you will have to download and install a Java plug-in from Sun Microsystems.

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## 2. Installation - Preparation

### Step 1: Readiness

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Desktop/Laptop: If you are performing a Desktop/Laptop installation you will need at least 500 MB of memory and about 5 GB of free disk space. Depending on your organization's IT setup, you may need administrative privileges to install the software. If that is the case, contact your IT department to help with the install, or see if they can provide a server for you.

If you are an end user (not an IT expert) we would suggest you download the installer\_win version. If you are an expert user or administrator, you will be comfortable with either version.

Server: If you are performing a Server installation on your network we would expect your IT department to perform the installation. Adaptive Planning can provide remote or on-site support as required.

Installation instructions below are specifically to help end users with the Windows version.

### Step 2: Download Adaptive Planning

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Download Adaptive Planning Express from:

<http://sourceforge.net/projects/adaptiveplan>

Once the download starts, it could take up to 30 minutes to finish.

While many users may find that they can just download and click on the installer to get started (particularly for single user installs), some may need additional help.

### Step 3: Java Runtime

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If you have Windows, you likely have the Java runtime installed already; go directly to Step 4. If not, download and install the Java runtime from:

<http://java.sun.com/javase/downloads/index.jsp>

Go to downloads and look for the Java Runtime Environment (JRE). There is no need for the large JDK. Choose (Java Runtime Environment) JRE 6.0 or higher. Agree to the license terms, and pick the multi-language Windows install. The size of the download should generally be less than 25 MB.

After downloading the JRE, install it.

### Step 4: Extract the Adaptive Planning download

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The Adaptive Planning download is a zip file. Use Winzip or Windows's extract option to extract the files to a location of your choice. Often you can just right click on the zip file in Windows Explorer to see the extract option. Windows usually will not allow you to execute files (even if you are able to view them) unless they are extracted first. Make sure that all files are on a local (not network) disk.

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## 3. Installation – One-Box, including Oracle Installation

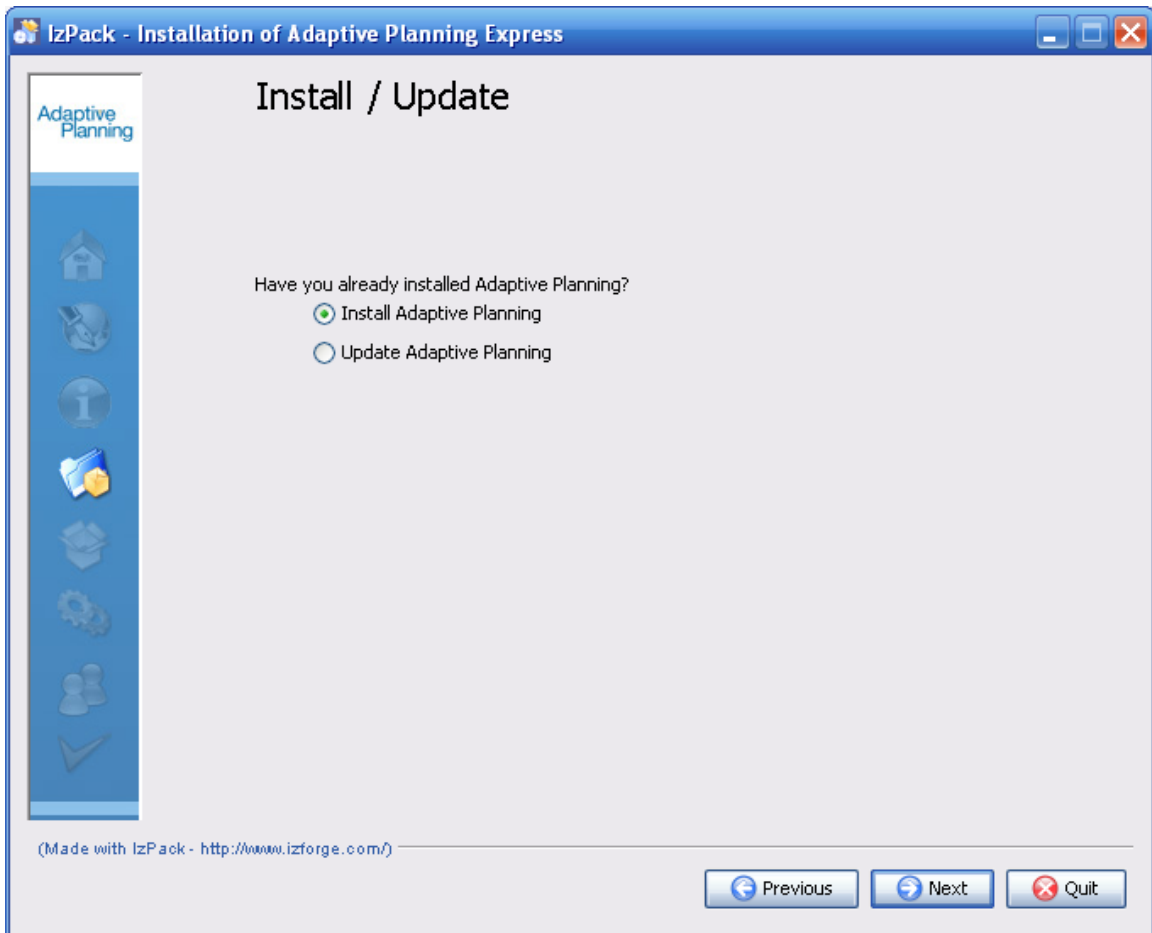
There are two options for installation. This section describes installing Adaptive Planning and its Oracle database on the same Windows machine. Setting up Adaptive Planning with its Oracle database on a second computer is described in the next section.

Run the installer. Windows users: using Windows File Explorer, navigate to the directory in which the files are extracted. The download has a README, a JAR file, and a .bat file. In Explorer, double click on the .bat file.

Follow the directions on the installation screens. The full installation process will take about 15 minutes (including Oracle Database 10g Express Edition and Tomcat).

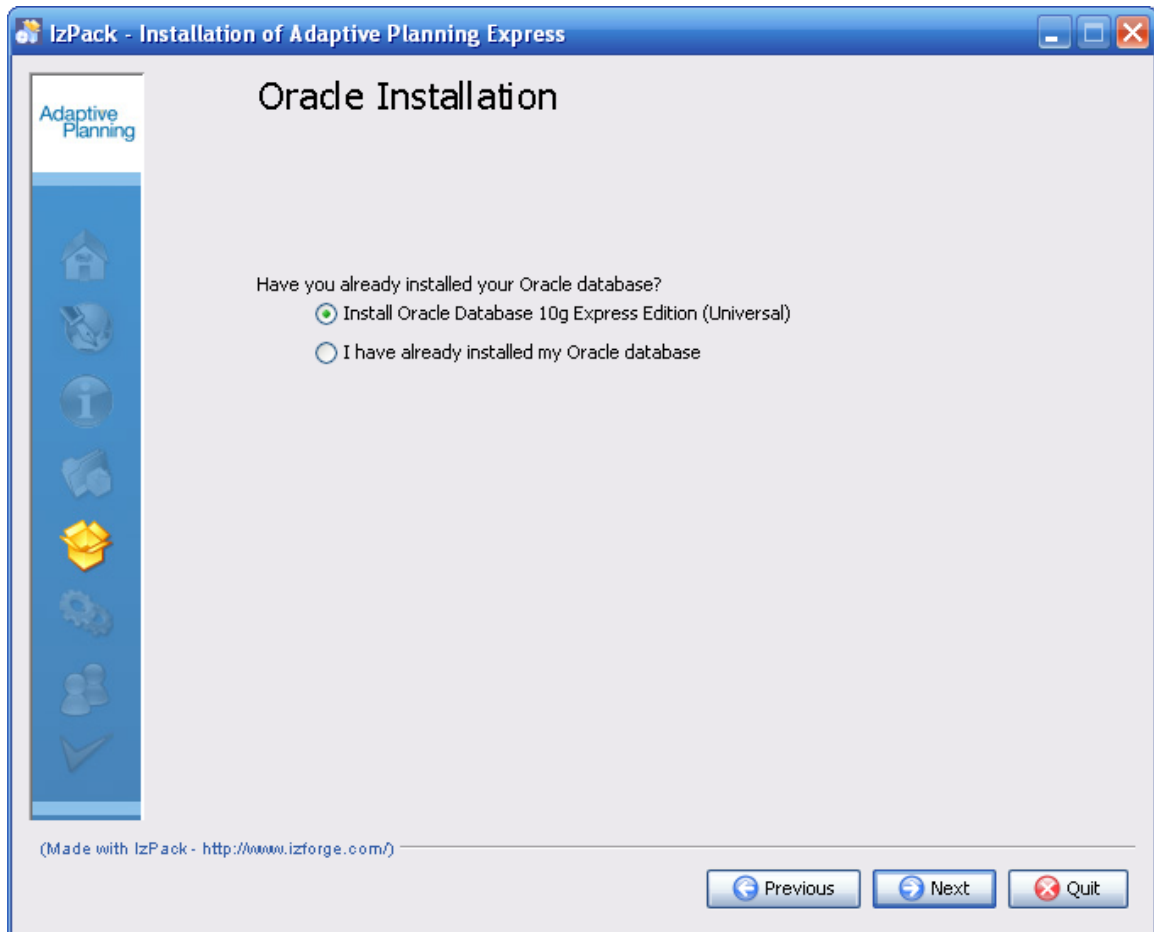
For smaller customer installations we recommend Oracle Database 10g Express Edition as the 4 GB of database size (prior to Oracle licensing fees being payable) is more than adequate.

After the first few screens, you will see the following, at which point select the Install option instead of the Update option:



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At the Oracle Installation screen, select the “Install Oracle” option:



These steps will take you through a full installation.

***Note that if you already have an existing Oracle installation, you can save time by using that installation as described below.***

At the end of the installation, you will be provided with a username and password to log into, along with the URL. Note these down.

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## 4. Installation or Upgrade – Existing Oracle Installation

Customers may choose to run Adaptive Planning in a two-box configuration in which the Adaptive Planning application is installed on one server and the Oracle database server is installed on a separate computer.

### Preparation

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#### *Prepare for Installation*

If you are performing an initial installation of Adaptive Planning, you must first:

- Ensure that the Oracle database software has been installed on the server to be used for the database, and
- Ensure that the Oracle client and the Oracle networking utilities have been installed on the server to be used to run the Adaptive Planning application. By default, when you use the Oracle installer to install the Oracle Client, the networking utilities are also installed.
- Make a note of the location of the **sqlplus** utility in the Oracle installation directory tree.

#### *Prepare for Upgrade*

If you are upgrading an existing Adaptive Planning installation, you must first:

- **Perform a full backup of your existing Adaptive Planning data;** see the section “Final Configuration of the Installed System” for suggested resources.
- **Perform a backup of key Adaptive Planning files from the previous installation (if they have been modified);** e.g., `catalina.sh` or `catalina.bat`, `server.xml`, useful logs files
- Install Perl on the server running the Adaptive Planning application (if you have not done so already); see the “System Requirements” section above
- Stop the Adaptive Planning application
  - Windows: Stop the Adaptive Planning service
  - Linux: Run `catalina.sh stop`

#### *Gather Information*

Next, gather the following information about your database server installation:

1. The machine name
2. The SID being used
3. The location of the `sqlplus` utility in the Oracle installation directory tree
4. The port number being used by the Oracle Listener on the database server machine

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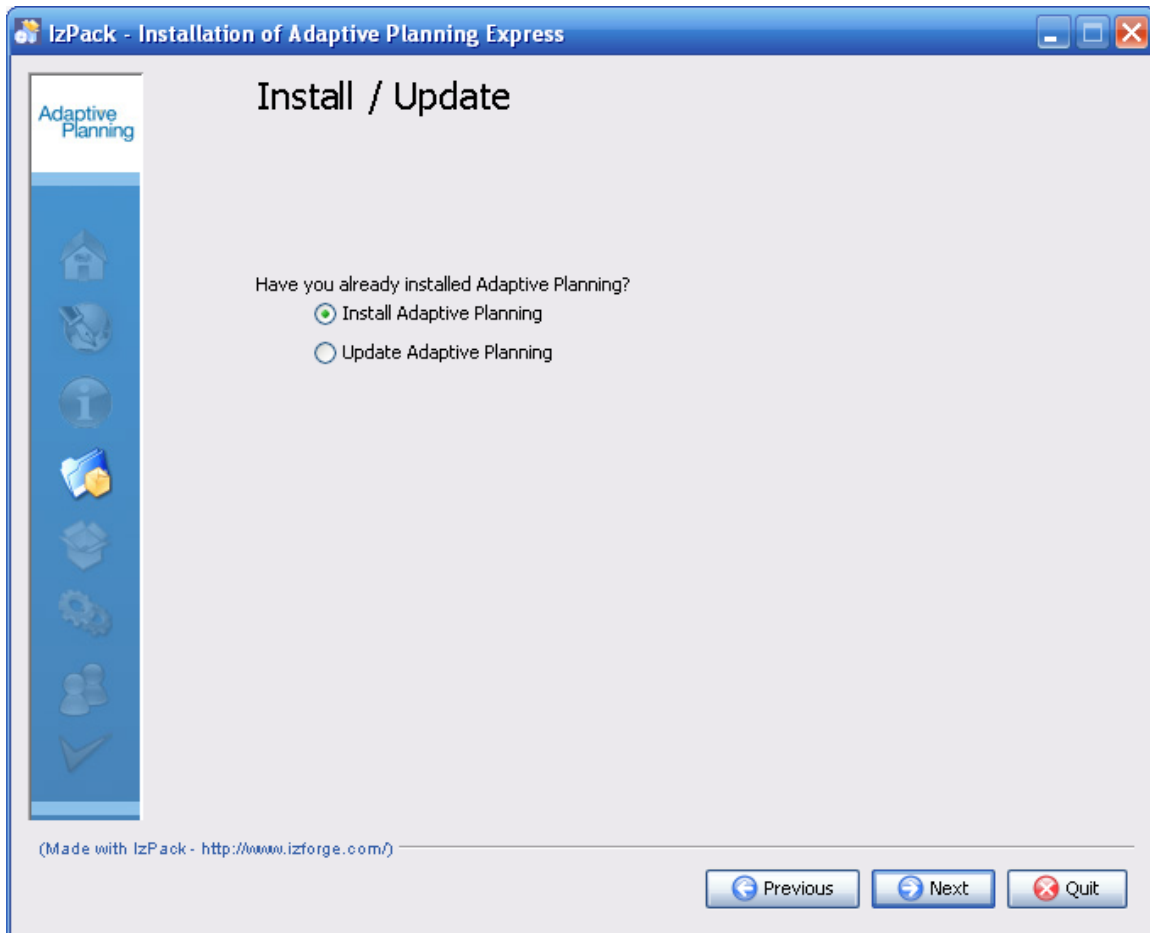
5. The data file directory location in your Oracle database server installation. While you can create the data files at any location on the database server machine, we recommend you do so in the standard Oracle location (typically, this will be in the subdirectory `oradata\SID`. So if your SID was XE, the data file location would be something like `C:\oraclexe\oradata\XE` if you were using Oracle Express as your database server
6. The block size specified when the database was created

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## Installing or Upgrading the Adaptive Planning Software

After completing the preparation steps above, you are ready to install or upgrade the Adaptive Planning software.

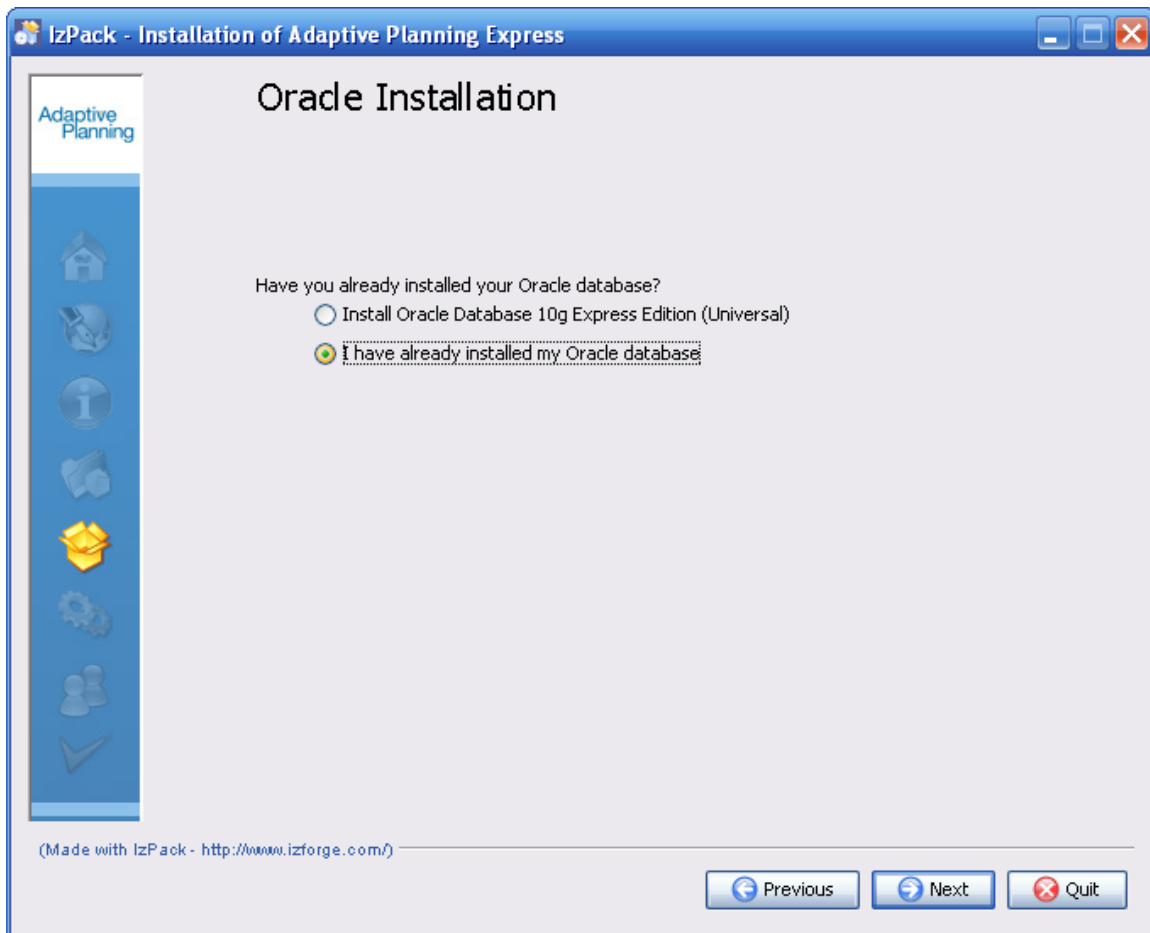
The procedures for initial installation and upgrade are very similar. To begin, launch the installer application. Upon launch, the following screen is shown; select here whether you are performing an initial installation vs. an upgrade (Update), then click Next.



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If the Install option was chosen, the screen below is displayed. Select the “I have already installed my Oracle database” option, then click Next.

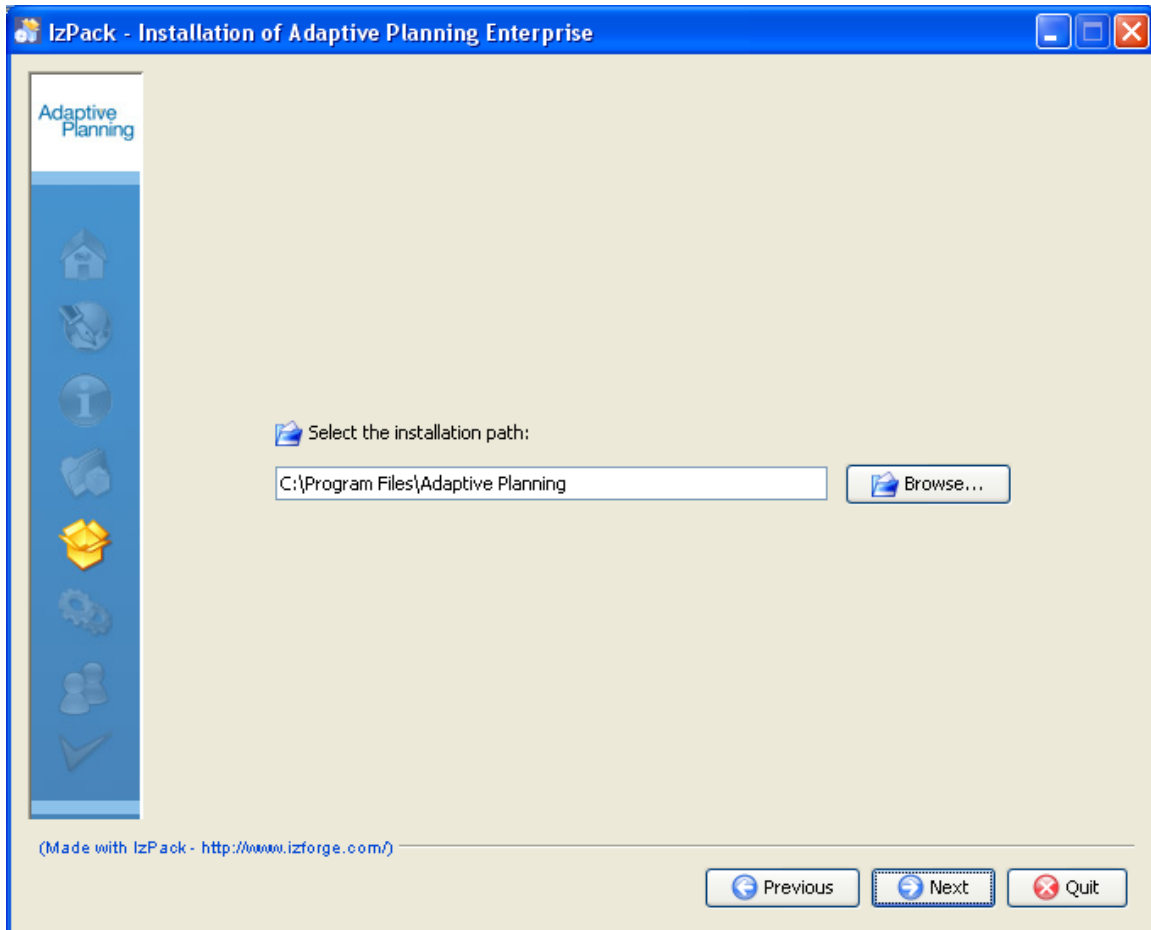
If the Update option was chosen, the screen below is not shown. Instead, you are taken directly to the next screen.



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If you are installing the Adaptive Planning application for the first time, specify a new directory where you want the Adaptive Planning software to be installed (the directory will be created if it does not exist), then click Next.

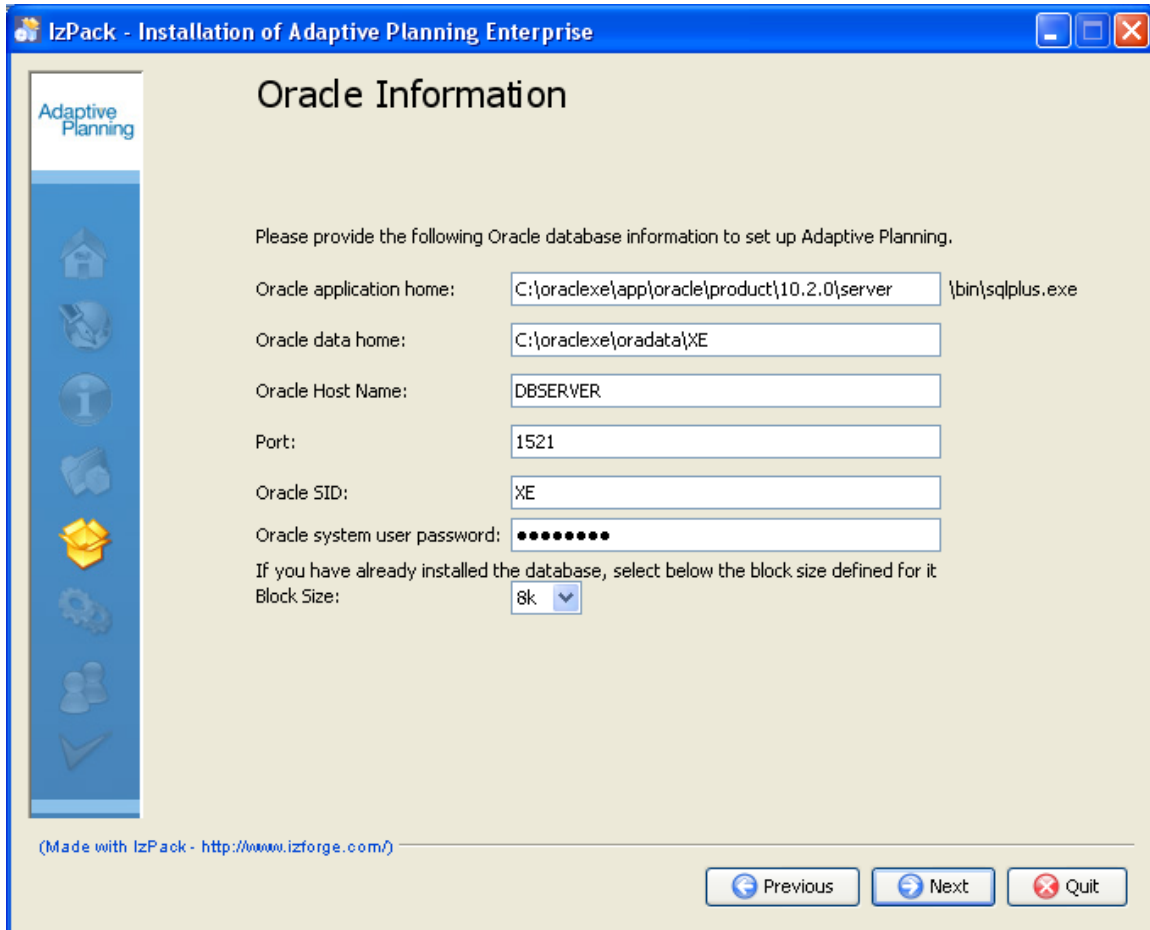
If you are upgrading Adaptive Planning, please enter the location of your existing Adaptive Planning software installation, then click Next.



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On this screen, enter the values you noted in the Preparation section. The block size chosen must match the block size used when the existing Oracle database was created. Once you have supplied all of the values, click Next to start the software installation / upgrade.

At the end of the installation, you will be provided with a user name and password to log into, along with the URL. Note these down, then proceed with the final configuration of the system as described in the following section.



The screenshot shows a window titled "IZPack - Installation of Adaptive Planning Enterprise". The main content area is titled "Oracle Information" and contains the following fields and instructions:

- Instruction: "Please provide the following Oracle database information to set up Adaptive Planning."
- Field: "Oracle application home:" with value "C:\oradex\app\oracle\product\10.2.0\server" and a file explorer icon on the right.
- Field: "Oracle data home:" with value "C:\oradex\oradata\XE".
- Field: "Oracle Host Name:" with value "DBSERVER".
- Field: "Port:" with value "1521".
- Field: "Oracle SID:" with value "XE".
- Field: "Oracle system user password:" with masked characters "••••••••".
- Instruction: "If you have already installed the database, select below the block size defined for it"
- Field: "Block Size:" with a dropdown menu showing "8k".

At the bottom of the window, there are three buttons: "Previous", "Next", and "Quit". A footer note reads "(Made with IZPack - <http://www.izforge.com/>)".

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## 5. Final Configuration of the Installed System

The installer will create three new icons. Click on the "Start AP" icon to launch the application.

Login with the details noted at the end of the installation procedure.

After entering the required information regarding Oracle, the installer generates a URL address for your Adaptive Planning application. This URL can be used to access your newly-installed Adaptive Planning application immediately *on your computer* using Internet Explorer 6.0 (or greater), subject to your internal network security and rights, etc. Note that this URL is only valid on your computer; to allow others to access the application, see "Enabling Access for Other Users," below.

The installer will remind you to create your initial Administrator User. We recommend that you log in as this user only to create a user for yourself. Then, log back in using your new login ID to begin using Adaptive Planning (add other users, develop the budgeting/planning model, etc.).

### Enabling Access for Other Users

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Use the administration tab to add new users. Decide what access rights you want to provide them. Consult the User Guide documentation for details.

Note that your colleagues will not be able to use the URL `http://localhost:1712/app`

Instead, direct them to log in to

`http://YOURMACHINENAME:1712/app`

Windows users: `YOURMACHINENAME` is the one that is found by right-clicking on "My Computer" and choosing Properties, and noting the entry under "Full Computer Name".

### Establishing Backup Procedures

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***Be sure to establish a backup procedure for the Adaptive Planning data in your Oracle database. Always perform a full backup before upgrading.***

Oracle backup documentation may be obtained from Oracle. Resources include:

Oracle Express:

[http://download.oracle.com/docs/cd/B25329\\_01/doc/admin.102/b25107/backrest.htm#i1004902](http://download.oracle.com/docs/cd/B25329_01/doc/admin.102/b25107/backrest.htm#i1004902)

Oracle Data Pump:

<http://www.oracle.com/technology/obe/obe10gdb/storage/datapump/datapump.htm>

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## 6. Converting to a Two-Box Installation

This section presents the steps to allow the Adaptive Planning application to connect to an instance of Oracle which is installed on a separate machine. We strongly recommend that the person who performs this operation be completely comfortable with the administration of Oracle. The Adaptive Planning application must be shut down while performing this task.

**Perform a full backup of your existing Adaptive Planning data** before beginning this procedure; see the section “Final Configuration of the Installed System” for suggested resources.

### **Create the Instance**

First the database must be placed on the remote machine. The easiest way to do this is to use the Oracle data pump utilities to export from the single machine installation and import into Oracle on the second machine.

Alternatively, you may leave the database intact on the original server. First, stop the Adaptive Planning application, then install the Adaptive Planning software on a new server, supplying a deliberately-incorrect SID and port. The software will be installed, though the installer will report problems connecting to the database. With the software now on the new server, proceed to the next step.

### **Change the Connection**

If you are familiar with Oracle networking, this is a straightforward process. First: configure the machine you want to run Adaptive Planning on such that you can connect to the database remotely. For example, for a database system is named “DBSERVER” prove you can connect by doing the following:

```
$ tnsping DBSERVER
```

You should see the following response:

```
TNS Ping Utility for 32-bit Windows: Version 10.2.0.1.0 -  
Production on 07-NOV-2006 09:38:26
```

```
Copyright (c) 1997, 2005, Oracle. All rights reserved.
```

```
Used parameter files:  
D:\ORACLE\product\10.2.0\db_1\network\admin\sqlnet.ora  
Used TNSNAMES adapter to resolve the alias  
Attempting to contact (DESCRIPTION =  
(ADDRESS_LIST = (ADDRESS = (PROTOCOL = TCP)(HOST  
= WATERSPOUT)(PORT = 1521))) (CONNECT_DATA =  
(SERVICE_NAME = anaconda.mycompany.com)))
```

```
OK (10 msec)
```

Note that you should see “Used TNSNAMES adapter” rather than “Used HOSTNAME adapter”. If you don’t, or TNSPING does not succeed, then you need to repair the Oracle networking before you can proceed.

Once you can TNSPING the database server, the next step is to try to connect with SQLPLUS. Again, using “DBSERVER” as the database system name, you can do the following:

```
$ sqlplus sys/password@DBSERVER
```

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Once you have verified that you can TNSPING and SQLPLUS, then all you need to do is to edit the file `/opt/adaptive_planning/live_build/Tomcat-*/conf/server.xml`. There you should find the ResourceParams section. You need to change the url parameter:

```
<ResourceParams name="jdbc/anaconda">
<parameter>
<name>factory</name>
<value>org.apache.commons.dbcp.BasicDataSourceFactory</value>
</parameter>
<parameter>
<name>driverClassName</name>
<value>oracle.jdbc.driver.OracleDriver</value>
</parameter>
<parameter>
<name>url</name>
<value>jdbc:oracle:thin:@localhost:1521:anaconda</value>
```

Change this last line to:

```
<value>jdbc:oracle:thin:@DBSERVER:1521:SERVICE_NAME</value>
```

... where DBSERVER is the name in the TNSNAMES for your database server and SERVICE\_NAME is the name of the Oracle service you want to connect to (anaconda.mycompany.com in the example). You can see that in the TNSPING response.

*Note: We have seen a few instances where using the SERVICE\_NAME did not work and instead we had to use the Oracle SID.*

Restart the application: it should now be connected to the remote database server.

## 7. Installing Language packs

Download the language pack(s) (available on SourceForge) and follow directions. Make sure that you install the language pack in the same directory as Adaptive Planning (for example, on Windows, `c:\Program Files\Adaptive Planning`).

To use the language of your choice:

IE7: Go to the Tools menu, Internet Options. Click on languages, and then add the language for the pack you just installed (if you do not already have it on your system). If you want this to be your primary language, move up the ordering to make the highest priority.

Firefox: Go to the Tools menu, Internet Options and go to the content tab. Click on languages, and then add the language for the pack you just installed (if you do not already have it on your system). If you want this to be your primary language, move up the ordering to make the highest priority.

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## 8. Troubleshooting

### (i) My installation appears to hang.

As mentioned above, your installation may take from about 15 to 30 minutes, depending on your hardware configuration. Note that, in addition to the Adaptive Planning application, the Tomcat server and Oracle 10g Express Edition are also being installed. If the progress bar does not appear to move, please wait. If for some reason the installation takes beyond 45 minutes, there may be a problem and it may be advisable to quit and attempt to reinstall.

### (ii) How do I recover from an aborted install?

The answer depends on where the installation was aborted. If it was before or after the successful installation of Oracle, the Adaptive Planning installer will usually be able to perform the needed clean up. If, however, the issue was during Oracle's install, please consult Oracle documentation. You will usually have to find and stop and Oracle services, and then try to reinstall Adaptive Planning.

### (iii) I have one or more firewall programs running on my system. What problems might I encounter?

If you have just a single firewall running (like with Windows XP SP2), just watch for the warning and click on unblock (see illustration below); you may need certain administrative privileges to do this.



If you have other firewalls like Symantec you may see this popup.

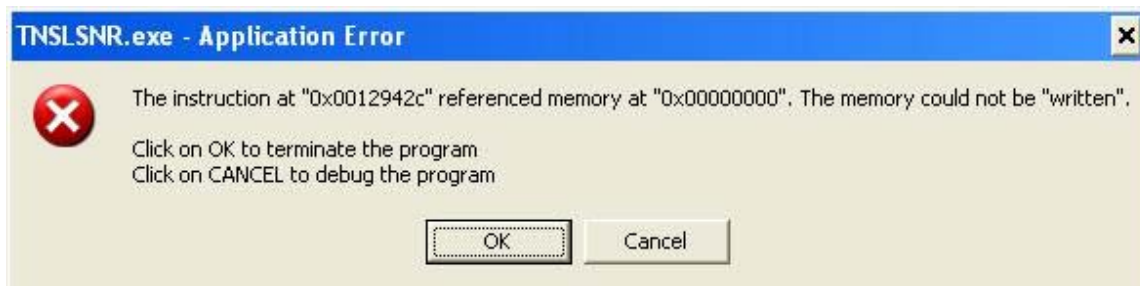
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Select the recommended option as shown.

Note: If you have more than one firewall program installed, you may need to go back and manually allow Oracle to run in all firewalls.

### (iv) I get the following Oracle application error. What should I do?



This is an Oracle installation issue. If you have got this far, it is likely that Oracle has already installed. You can attempt to recover from this by clicking OK. Then close all applications. Reboot. Start the installer again. When you see the option now to install a new database or use an existing one, select the latter, with the password as *ap3express (or other local password)*. This will allow you to continue and not have to install Oracle all over again.

### (v) I see a Tomcat service stop warning on Windows

During an upgrade of the Adaptive Planning software from version 4.0.1 to 5.1, you may see a error messages at the end of the installation:

```
"The specified service does not exist as an installed service."
```

```
"Unable to delete Tomcat6 service"
```

Examining the install log, you see:

```
"Upgrade process successfully completed."  
The service 'Tomcat6' has been removed
```

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```
Installing the service 'Tomcat6'  
...  
...  
The service 'Tomcat6' has been installed.  
"Adaptive Planning Service installed successfully"  
"Adaptive Planning Service started"
```

This warning can be ignored. Note that upon reboot the application may not start automatically. Check Windows services, and change the service from Manual to Auto if needed.

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## 9. Getting Help

Visit the community pages at:

<http://community.adaptiveplanning.com>. You may need to register to post questions. Paid support options may also be available. Contact [sales@adaptiveplanning.com](mailto:sales@adaptiveplanning.com)