



TARGIT BI Suite 2K11

TARGIT

Installation and configuration guide

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Introduction

The overwhelming combinations when it comes to setting up operating systems, databases, services etc. sometimes make it difficult to get the system environment ready for installation of TARGIT components. This installation and configuration guide is created as a help for system administrators when installing TARGIT components or when configuring the system environment and TARGIT. Please note that this guide is only meant as a supplement to the client user guides, so please address these user guides first when having problems.

This guide focuses on TARGIT Server and TARGIT client installs. For further information about installing TARGIT Portal Development Kit or TARGIT SharePoint WebPart please refer to the specific documentation for these components.

General notes on installations

The components in TARGIT are very different from each other. However, there are some guidelines that must be followed no matter what component you are installing:

- Make sure that your system environment is fully updated i.e. latest service packs and updates are installed for operating systems and database management systems.
- Make sure that clients and servers always run the same version of TARGIT.

Further guidelines exist for individual components of TARGIT. These guidelines are presented in the relevant sections about installation.

Note: Make sure that all data from your data sources contain characters that are valid in XML, since many of the underlying files in TARGIT are based on XML. Validity is based on the W3 definition where the following characters are accepted:

Char ::= #x9 | #xA | #xD | [#x20-#xD7FF] | [#xE000-#xFFFF] | [#x10000-#x10FFFF] (any Unicode character, excluding the surrogate blocks, FFFE, and FFFF)

Server

This section provides information about server-side issues related to handling TARGIT installations, upgrades, migrations and configuring the server environment.

System recommendations

In order for TARGIT to perform well some system recommendations should be fulfilled. Notice that the following requirements are for the server components handled in this guide only. For further information about other components please refer to the specific documentation for these components.

TARGIT Server

TARGIT Server requires a business class computer running Windows Server 2003 or Windows Server 2008. Furthermore, .NET Framework 3.5 SP1 needs to be installed on the server. TARGIT Server will also run on Windows Server 2000 with SP4, Windows XP, Windows Vista and Windows 7, but these operating systems are not recommended as server production environments. Reporting Services support requires access to Microsoft SQL Server Reporting Services 2000 with SP1 or higher, Microsoft SQL Server Reporting Services 2005 or Microsoft SQL Server Reporting Services 2008.

It is recommended that TARGIT Management Studio and the TARGIT windows client is also installed on the server, as these applications make it convenient to configure the setup and check any changes made to the setup. If the TARGIT windows client is installed on the server make sure that Microsoft .NET Framework version 3.5 SP1 is installed prior to installing TARGIT.

TARGIT NET

TARGIT NET requires a business class computer running Windows Server 2003 or Windows Server 2008. TARGIT Server will also run on Windows XP, Windows Vista and Windows 7, but these operating systems are not recommended as server production environments.

Installation of TARGIT NET must be performed on a server with Microsoft Internet Information Services (IIS) installed and with TCP/IP access to an active TARGIT Server with a valid TARGIT NET license. Furthermore, .NET Framework 3.5 SP1 must be installed for the installer to run and since TARGIT NET is a .NET 2.0 application .NET Framework 2.0 needs to be installed on the server. Other versions of the .NET Framework may also be installed as long as 2.0 is installed and used by TARGIT NET.

Server Installation

The server components handled in this document are TARGIT Server and TARGIT NET. This section explains how to install the components on different operating systems and for the TARGIT NET component, how to install on different versions of Internet Information Services.

This chapter assumes that no TARGIT components have previously been installed on the server. If performing an upgrade, please refer to the section "Upgrading a Server Installation".

Planning a Server Installation

When installing TARGIT Server or TARGIT NET always make sure that the operating system and any data warehouses are fully updated with the latest service packs and other updates as mentioned in the chapter "General notes on installations". Furthermore, make sure that the .msi-files are executed locally and not from a network resource since network instabilities might cause problems.

Setup options

Depending on the size and performance demands to the TARGIT solution different setups are possible. Note that the given row examples are very rough guidelines, that are highly dependent on usage intensity, request types, server hardware and data complexity. Also note that the following guidelines are based on running TARGIT NET in 64 bit.

The first example is a small OLAP Database solution, which has less than 10 million rows in the fact tables combined. In this example the strain on the relational database engine and Analysis Services is limited during ETL and processing due to the limited amount of records, but the load caused by user activity on the TARGIT Server, TARGIT NET and Analysis Services will go up as the number of users increase. However solutions like these could very well be hosted on a single server – which increases in CPU power and memory as the number of users increase. Note, that even though the number of users increases, there is still only a single instance of TARGIT NET running because it supports 64 bit operation.

In the second example the number of rows has been upped to a ten fold increase (100 million rows). The recommendation is to split the load on two servers – one which hosts the relational SQL engine and Analysis Services – the other hosting TARGIT Server and TARGIT NET. With solutions of this size, the disk system on the server hosting the relational SQL engine and Analysis Services becomes an important factor, as the disks are used heavily during ETL by both applications – but Analysis Services also has many I/O operations during user activity. Remember, that user activity on large OLAP databases needs more resources than the same user activity on smaller OLAP databases.

The disk activity is not that intense on the server hosting TARGIT Server and TARGIT NET, so special attention to the disk system is not needed here. This detail also makes this server more suited to virtualization – compared to the server hosting Analysis Services and the relational SQL server, which is generally best hosted on physical server(s).

The server split in this example is not strictly necessary, the two servers may easily be replaced with a single larger server.

The third and last example is the "large" or enterprise size solutions area, at least data wise with more than 100 million rows. A third server is introduced which solely hosts the relational SQL engine. The disk systems are now very important on the servers hosting the relational SQL engine and Analysis Services, as is the memory and CPU resources of the server hosting Analysis Services.

In this setup the server hosting the relational SQL engine should be the same, no matter the number of users. This is because this application is only used during the ETL process, and not when users are accessing the solution.

The server hosting the TARGIT Server and TARGIT NET should also have the same server specifications as in the medium sized solution above. This is because most of the extra load in this solution during ETL and usage is on Analysis Services. The load on the server hosting the TARGIT applications is almost the same (most likely a little higher) no matter the size of the OLAP database – it is the number of users that now defines its resource needs. This is of course to a large degree depending on the type of usage – large OLAP databases enhances the chances of "wrong" (resource heavy) usage due to poorly designed analyses and reports.

Installing TARGIT

This section provides information about the TARGIT installation wizard. The installation wizard includes the three components: TARGIT windows client, TARGIT Server and TARGIT Management Studio. It is recommended to install all three components on the server. TARGIT windows client and TARGIT Management Studio do not have to be installed, but are nice for configuration purposes and checks.

Windows Server 2003 and 2008

When the TARGITBISuite.msi file is executed the installation wizard starts. The first dialogs consist of basic user inputs such as license agreement, user information and destination may be set. Later, authentication type must be selected. Windows authentication is chosen as default and is the most commonly used. Standard authentication is a basic authentication model, where users and their passwords are handled inside TARGIT Management Studio. Before installation begins three installation types are available. It is recommended to select 'Typical' as it will install the most common application features and any unwanted components may be deselected at the next step of the installation. When the installation has finished it is recommended to get acquainted with the file structure inside the installation folder, since it holds information that may be useful in certain situations e.g. upgrading or optimizing. Information about content in the folders is found in the section "Installation Contents".

For more information on security issues see the section "Running TARGIT on separate servers".

Installing TARGIT NET

TARGIT NET makes it possible to access data using only a web browser. TARGIT NET may also be integrated into existing web pages using the Portal Development Kit (PDK) or into Microsoft Sharepoint solutions using the TARGIT web part. TARGIT NET is also required for using TARGIT Desktop. The following steps are general installation steps that need to be taken on each installation.

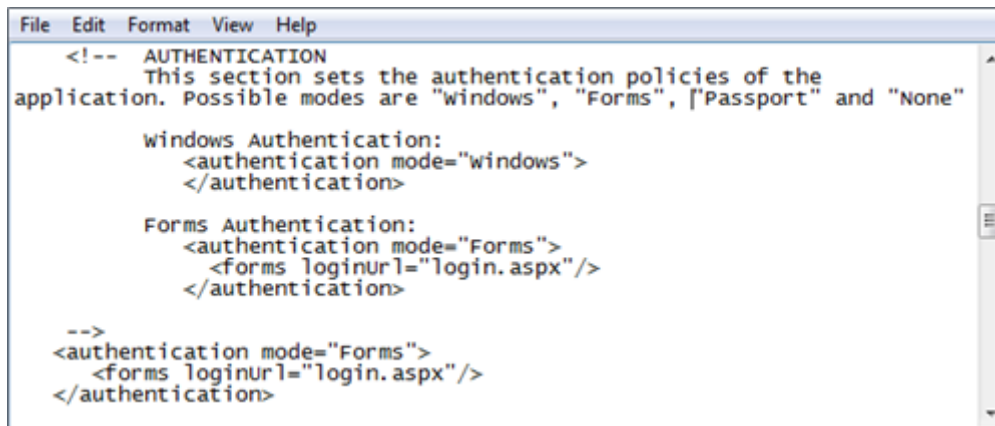
Note: The TARGITNET.msi installation file on Windows Server 2008, Windows Vista or Windows 7 has to be run as an administrator. This is done easily by clicking the 'Start' button in Windows and typing 'cmd' in the search field. The file 'cmd.exe' appears in the result list. Right-click this file and select 'Run as administrator'. When the command prompt window opens, navigate to the folder where the .msi file is located and run the file.

When the TARGITNET.msi file is executed the installation wizard starts. The first dialogs consist of basic user inputs such as license agreement, user information and destination may be set. Then the dialogs and options presented in the rest of the installation wizard are dependent on the version of IIS running on the server. If using IIS 6.0 on Windows Server 2003 three installation options appear; New Web Site, Existing Web Site and Virtual Directory. The virtual directory installation is the default installation and creates a virtual directory for TARGIT NET. It is preferable if TARGIT NET should stay on the same domain e.g. www.mycompany.com/TARGITNET. If more than the default web site is available, a destination web site must be chosen from the list of web sites. In the 'New Virtual Directory' dialog the directory name is by default set to 'TARGITNET' but may be changed. This name shouldn't be changed. A parent directory may also be set for the directory if needed. The physical directory of TARGIT NET is by default 'C:\Inetpub\wwwroot\TARGITNET' but may also be changed.

Note: Since GIS components are installed with the Windows client they won't be available by installing TARGIT NET only. To get access to GIS components in TARGIT NET the Windows client must also be installed on the server.

Changing authentication method

TARGIT NET is now ready for use assuming the authentication method is Windows Authentication. TARGIT NET must use the same authentication method as the TARGIT. If TARGIT NET uses Standard Authentication, then the authentication method of TARGIT NET is changed by opening the Web.config file. It is by default located in the folder 'C:\Inetpub\wwwroot\TARGITNET'. Open the Web.config file in a text editor and search for "Authentication". This will bring you to a commented section of the configuration file. Within the comments are the syntaxes for the two options. Please note that Forms Authentication is the same as Standard Authentication, i.e. an authentication method where the end user of the TARGIT NET client must provide a username and a password to be allowed access. Right below the commented section are the lines that need to be replaced if the authentication method needs to be changed.

A screenshot of a text editor window with a menu bar (File, Edit, Format, View, Help). The text inside shows XML configuration for authentication. It starts with a comment: <!-- AUTHENTICATION This section sets the authentication policies of the application. Possible modes are "windows", "Forms", ["Passport" and "None". Below this, there are two sections: 'Windows Authentication' with <authentication mode="windows"> and </authentication>, and 'Forms Authentication' with <authentication mode="Forms">, <forms loginurl="login.aspx"/>, and </authentication>. At the bottom, there is a <!--> comment followed by <authentication mode="Forms">, <forms loginurl="login.aspx"/>, and </authentication>.

The screenshot shows the Web.config file after it was changed to standard authentication

Configuring access to TARGIT Server on another server

If the TARGIT NET server and the TARGIT Server are installed on different physical servers, the Web.config file on the TARGIT NET server needs to be changed. To change the TARGIT Server server name open the Web.config file from the folder 'C:\Inetpub\wwwroot\TARGITNET' and change the value 'localhost' in this line; <add key="ANTServer" value="localhost"> to the DNS name of the server running TARGIT. Localhost should only be used when the TARGIT NET server and the TARGIT Server are on the same physical server. Note that splitting up servers requires some changes to the security setup. See the section "Running Analysis Services, and TARGIT on separate servers" for more on this issue.

Internet Information Services (IIS) 6.0

IIS 6.0 is installed on Windows Server 2003 and before using TARGIT NET in this setup the following changes and checks must be done:

- Access to IIS Manager is obtained from Start | Administrative Tools | Internet Information Services (IIS) Manager. When the Manager has been opened, locate the TARGIT NET application in the tree structure: Internet Information Services | Server name | Web Sites | Default Web Site | TARGIT NET. Right-click it and select properties. A properties dialog is shown with several tabs in the top.
- Go to the Documents tab and make sure that the startup page in TARGIT NET, Default.aspx, is on top in the list of documents. If the page doesn't occur in the listing, then add it by clicking the 'Add' button to the right.
- If you don't want to permit anonymous access to TARGIT NET go to the 'Directory Security' tab and click 'Edit' under 'Authentication and access control' and disable it.
- If more than one version of Microsoft .NET Framework has been installed on the server, you must go to the ASP.NET tab to make sure that TARGIT NET uses ASP.NET version 2.0.

- If .NET Framework 2.0 is installed after TARGIT NET is installed, then make sure to register the framework by going to the command prompt and the folder 'C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727'. Then run the command 'aspnet_regiis.exe /i'.
- In the Internet Information Services Manager go to the Web Service Extensions folder to make sure the ASP.NET web service extension is set to Allowed.
- After this procedure return to the command prompt and run the command 'iisreset'.

Internet Information Services (IIS) 7.0

IIS 7.0 is used on Windows Server 2008. Make sure that IIS 7.0 is installed with the Web Server (IIS) role and the following role services before using TARGIT NET. This is done from 'Start | Control Panel | Programs and Features' and then selecting 'Turn Windows features on or off' in the left side of the window:

- Security | Windows Authentication
- Application Development | ASP.Net
- Common HTTP Features | Static Content
- Common HTTP Features | Default Document
- Common HTTP Features | HTTP Redirection
- Common HTTP Features | Directory Browsing

If more than one version of Microsoft .NET Framework has been installed on the server, it is recommended that the application pool that TARGIT NET runs in is set to .NET Framework version 2.0, since TARGIT NET is a .NET Framework 2.0 application. TARGIT NET does run on .NET Framework version 4.0, but nothing is gained by running this version since the application was designed for version 2.0.

Reports have indicated installation problems caused by the User Account Control (UAC) in Windows Server 2008. In these cases UAC prevents the installer to access certain parts of the system, so the following error is shown when running TARGIT NET: "Retrieving the COM class factory for component with CLSID {...} failed due to the following error: 80070005". To make TARGIT NET install correctly make sure it is installed by a user where the UAC doesn't prevent changes to the system.

Running TARGIT NET in 32 bit mode on 64 bit server

The TARGIT client is based on an ActiveX program (analysis.ocx). When using TARGIT NET the ActiveX component, analysis.ocx, is used by a .NET application (TARGIT NET) in the same way as the windows version is loaded by TARGIT.exe. Since analysis.ocx is a 32 bit application the IIS has to run in a 32 bit mode in order for the .NET application to communicate with the 32 bit analysis.ocx.

The following steps must be performed to run IIS 6.0 in 32 bit mode:

- Install Microsoft .NET Framework Version 2.0
- Open the command prompt
- Go to 'C:\inetpub\AdminScripts'

- Run this script from the prompt: 'cscript adsutil.vbs set w3svc/apppools/enable32bitapponwin64 1'
- Open the command prompt
- Go to 'C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727'
- Run this from the prompt: 'aspnet_regiis.exe /i'
- Open the IIS manager and go to Web Service Extension and set ASP.NET Ver. 2.0 (32-bit) to allow
- Now TARGIT NET may be installed on the server.

The following steps must be performed to run TARGIT NET in 32 bit mode on IIS 7.0:

- After TARGIT NET has been installed go to 'Internet Information Services (IIS) Manager'
- Open 'Application Pools' from the connection tree to the left
- Right-click on the application pool for TARGIT NET and select 'Advanced settings'
- Set "Enable 32-Bit Applications" to true
- TARGIT NET now runs in 32 bit mode

Running TARGIT NET in 64 bit mode

A default installation of TARGIT NET requires the assigned application pool to be run in 32 bit mode as TARGIT NET relies on wrapping a 32 bit component it is sharing with the Windows client. Running IIS in 32 bit mode has the disadvantage of not being able to use more than 2-3 GB of memory. A solution is to run the 32 bit component out-of-process, meaning that the component is executed in "parallel" with the application that uses it rather than "inside" it. This means that TARGIT NET can be run in 64 bit mode and more memory can be used.

By default the 64-bit setting in the web.config file (<add key="64bit" value="auto">) is set to "auto" thereby automatically detecting whether the environment is 32- or 64-bit. The setting may also be changed to 32-bit by changing the value to "0" and 64-bit to "1". In IIS the following changes must be done to run TARGIT NET in 64-bit mode:

- Make sure the option "Enable 32-Bit Applications" is set to false for the application pool serving TARGIT NET (for IIS specific details see the section "Installing TARGIT NET")
- Run iisreset from the command prompt
- TARGIT NET now runs in 64 bit mode

Some standard settings apply to the out-of-process component. As a rule of thumb these settings should not be changed. The settings are reached from the 'Component Services' under 'Administrative Tools'. In the Components Services dialog properties on the TARGIT Out-of-process must be opened. This is done (on Windows Server 2003) by unfolding 'Component Services', 'My Computer' and 'COM+ Applications' and then right-click and select 'Properties' for the TARGIT Out-of-process application. One of the tabs is named 'Pooling & Recycling' and contains the following settings:

Pool size (Application Pooling)

This is the number of "parallel" processes that are running TARGIT NET. This setting defines the efficiency of running 64 bit mode since the server memory may be distributed to several processes. As

default the pool size is set to the rounded off amount of memory (gigabytes) on the server i.e. on a 3,7 GB server the TARGIT Out-of-process pool size is set to 4. In this way TARGIT NET is able to utilize all memory on a server, no matter how much. Note that a default is only set when installing TARGIT NET, so if more server memory is installed the setting must be changed manually. Also when uninstalling TARGIT NET the TARGIT Out-of-process application is not uninstalled and must be deleted manually to set new defaults when installing a new version of TARGIT NET. The creation of the processes may be verified in the Windows Task Manager as each process runs as a dllhost.exe process (Network service).

Lifetime Limit (Application Recycling)

Indicates the maximum number of minutes a process can run before it's recycled. The valid range is 0 through 30,240 minutes (21 days). The default number of minutes for TARGIT Out-of-process is 0 meaning this setting is disabled.

Memory Limit (Application Recycling)

Indicates the maximum amount of process memory usage (in kilobytes) before recycling the process. If the process's memory usage exceeds the specified number for longer than one minute, the process is recycled. The valid range is 0 through 1,048,576 KB, and the default amount of memory usage is 0 KB meaning this setting is disabled.

Expiration Timeout (Application Recycling)

Indicates the number of minutes to wait, before being forcibly shut down, for the release of all external references to objects in the process. The valid range is 1 through 1440 minutes (24 hours), and the default expiration time-out for TARGIT Out-of-process is set to the maximum of 1440 minutes. This value is used only when it is already determined that a process will be recycled based on the other criteria.

Call Limit (Application Recycling)

Indicates the maximum number of calls that application objects can accept before recycling the process. The valid range is 0 through 1,048,576 calls, and the default number of calls for TARGIT Out-of-process is 0 meaning this setting is disabled.

Activation Limit (Application Recycling)

This setting defines the maximum number of user logons for each process (log offs are not subtracted from this number) before recycling it. The valid range is 0 through 1,048,576 activations. The default number of logons for TARGIT Out-of-process is 100. A new process is not created before the activation limit of the other processes is reached. Hence, with a pool size of 4 it will take over 300 logons and active users in each process to have 4 concurrent processes.

When users log on to TARGIT NET they are assigned to one of the processes defined in the pool size. Each process accepts logons from users until the activation limit is reached. When the limit is reached the process is marked for recycling and a new process is created for future usage. When the old process gets marked for recycling the expiration timeout counter starts and after 1440 minutes (24

hours) the process is forced to shut down unless activity has stopped before the timeout limit is reached, in which case the process is also shut down.

Backing up and restoring a Server Installation

Backing up and restoring the TARGIT installation is an essential step when performing major changes e.g. upgrading or moving an installation. As a minimum the ANTserver folder in the TARGIT installation folder should be backed up. Further, the VFS folder with all the analyses and reports must also be backed up if it is not located in the default placement inside the ANTserver folder. The same goes for the folder with exported reports. By default it is also located inside the ANTserver folder, but another location may be specified in TARGIT Management Studio. If the reports are exported to any other folder it must be backed up as well.

Note: If the system database is not located in any of the above mentioned folders e.g. if it is an SQL database, it should also be backed up. If you are upgrading from build 2803 or earlier a backup of the registry must be taken, since some settings in these versions are saved in the registry.

If, for any reason, something goes wrong and the need arise to recover the backup, follow these steps:

- Uninstall TARGIT and delete the installation folder (Default: C:\Programs Files\TARGIT).
- Install the same version of TARGIT as the backup was retrieved from.
- Copy the backed up TARGIT folder to the new TARGIT installation folder overwriting any existing files and folders.
- Copy the backed up VFS and Exported reports folders to the placement they had when backing them up.
- Restore the backed up registry (only on build 2803 or earlier).

Migrating an Installation to another Server

If the TARGIT installation must be moved to another server the following steps should be followed:

- Backup the current installation as described in the section "Backing up and restoring a Server Installation".
- Install TARGIT on the new server.
- Copy the backed up TARGIT folder to the new TARGIT installation folder overwriting any existing files and folders.
- Copy the backed up VFS and Exported reports folders, if any, to the placement they had when backing them up.
- If the system database is not located in the ANTserver folder e.g. if it is an SQL database it should be restored as well.

If the TARGIT environment is set up on multiple servers make sure that any security settings on the old server is also set up on the new server (e.g. service account access, security package setup in TARGIT Management Studio etc.). For more information on what should be set up see the section "Running TARGIT on separate servers".

Running TARGIT on separate servers

This section explains two TARGIT setups. The first is a simple setup where TARGIT Server is located on one server along with SQL Server and TARGIT NET is located on another server. The next setup is spread on three servers; one with SQL Server, one with TARGIT Server and one with TARGIT NET. The following guidelines are based on running Windows Server 2003 on the domain controller.

Running TARGIT Server and TARGIT NET on separate servers

Standard Authentication

Follow these steps to setup TARGIT Server and TARGIT NET to run on separate servers with standard authentication:

- Install TARGIT Server on Server 1 with standard authentication (see "Installing TARGIT Server").
- Install TARGIT NET on Server 2 (see "Installing TARGIT Server").
- Change the TARGIT Server keyvalue from localhost to the name of the server hosting TARGIT Server in the Web.config file (c:\inetpub\wwwroot\TARGITNET) on Server 2 (see "Installing TARGIT NET").
- Change the authentication type to standard authentication in the Web.config file (c:\inetpub\wwwroot\TARGITNET) on Server 2. (see "Installing TARGIT NET").

Windows authentication

Follow these steps to setup TARGIT Server and TARGIT NET to run on separate servers with Windows authentication:

- Install TARGIT Server on Server 1 with Windows authentication (see "Installing TARGIT Server").
- Install TARGIT NET on Server 2 (see "Installing TARGIT NET").
- On Server 2 go to the Internet Information Services (IIS) Manager and right-click the TARGIT NET web site under 'Default web sites' and select 'Properties'. In the new dialog select the 'Directory security' tab and click 'Edit' in the 'Authentication and access control' section. Then make sure that the 'Integrated Windows authentication' checkbox is checked.
- Change the TARGIT Server keyvalue from localhost to the name of the server hosting TARGIT Server in the Web.config file (c:\inetpub\wwwroot\TARGITNET) on Server 2 (see "Installing TARGIT NET").

- Make sure that the authentication type is set to Windows authentication in the Web.config file (c:\inetpub\wwwroot\TARGITNET) on Server 2. (see "Installing TARGIT NET").
- On Server 1 in TARGIT Management Studio under the 'Security' module set the security package to 'Negotiate'.
- On the Domain Controller in the Active Directory check that the 'Trust computer for delegation' checkbox is checked for Server 2. This is done by opening 'Start | All Programs | Administrative Tools | Active Directory Users and Computers', unfold the domain tree to the left and select 'Computers', double-click Server 2 and check the mentioned checkbox on the 'General' tab.
- **Note:** It is important to check that users in the Active Directory do not have the option 'Account is sensitive and cannot be delegated' checked. The option is found by clicking the 'Users' folder in the domain tree and double-click on a user. In the dialog that opens select the 'Account' tab. The option may now be found under 'Account options'.

Running Analysis Services, TARGIT Server and TARGIT NET on separate servers

This section provides guidelines on how to set up a TARGIT environment with Microsoft Analysis Services, TARGIT Server and TARGIT NET on separate servers using constraint delegation. The guidelines are based on a server setup with Windows Server 2003 and might not be adapted directly into a Windows Server 2008 setup. Note that the following are only guidelines and since other settings may affect the setup it is not guaranteed to work with your specific setup. For more information on making a multiple server setup please ask your support contact. The following guidelines are divided according to the servers in the setup.

Active Directory Server

To enable all Active Directory features all domain controllers must run Windows Server 2003 or 2008. Therefore the domain functionality level must be raised to Windows Server 2003 in the 'Active Directory Users and Computers' dialog. To make sure that the server hosting TARGIT Server can be used for delegation it has to be trusted for delegation in 'Active Directory Users and Computers'. Then a standard domain user that is used to delegate between servers must be created and also an alias should be created for the domain in the DNS. This alias is used to connect successfully with a delegated user to the TARGIT Server and therefore must be created with the fully qualified domain name of the TARGIT Server server.

The standard domain user that is used to delegate between servers and the TARGIT NET server must then be allowed to delegate users in 'Active Directory Users and Computers'.

To use Kerberos authentication an SPN (Service Principal Name) mapping must be made between the services on the Analysis Services, TARGIT NET and TARGIT Server servers and the account responsible for the management of the service. This mapping is made by setting the SPNs in the following way (note that Windows Support Tools must be installed on Windows Server 2003. It is already installed on Windows Server 2008):

- `setspn -a http/[TARGIT NET server] [domain]\[TARGIT NET server]`

- setspn - a http/[TARGIT NET server].[domain] [domain]\[TARGIT NET server]
- setspn - a Host/[alias] [domain]\[delegated user]
- setspn - a Host/[alias].[domain] [domain]\[delegated user]
- setspn - a Msolapsvc.3/[Analysis Services server] [domain]\[delegated user]
- setspn - a Msolapsvc.3/[Analysis Services server].[domain] [domain]\[delegated user]

The registered SPNs may be checked with the command: setspn -l [TARGIT NET server or delegated user]. This command is convenient to use to make sure that duplicate SPN's are not registered.

Analysis Services Server

On the Analysis Services Server the domain user that was created to delegate must be added to the local SQLServer2005MSOLAPUser\$[Analysis Services server]\$, [Instance name] and SQLServer2005SQLBrowserUser\$[Analysis Services server] groups (SQLServerMSAUser\$[Analysis Services server]\$, [Instance name] and SQLServer2005SQLBrowserUser\$[Analysis Services server] for Analysis Services 2008) as well as the local Administrator group. Also the delegated domain user must be used to log on the SQL Server Analysis Services service.

TARGIT Server Server

On the server hosting the TARGIT Server, make sure the TARGIT Server service logs on with the domain user that was created for delegation. Also make sure that this domain user is member of the local administrator group on the server.

In TARGIT Management Studio make sure security package is set to Kerberos under Security in order for the TARGIT Server to detect Kerberos authentication automatically. Note that before the TARGIT Server can connect to Analysis Services ADOMD.NET must be installed on the server. It is available from the SQL Server 2005/2008 feature packs.

TARGIT NET Server

Install TARGIT NET with default settings (using a virtual directory under default website). After installation change the web.config and set the TARGIT Server value to the name of the DNS alias that was created on the Active Directory Server. If using subdomains the fully qualified servername with domain details must be entered.

Since the setup is based on Windows authentication Anonymous access must be disabled and Integrated Windows authentication must be enabled for the TARGIT website. This is done under 'Properties' for the website in the Internet Information Services (IIS) Manager .

After making the above changes perform an iisreset from the command prompt.

TARGIT Client PC

When accessing the TARGIT NET website from the client PC make sure the URL TARGIT NET is placed under 'Local intranet sites' and that Windows Authentication is enabled in the browser (Tools | Internet Options | Advanced).

Dynamic Periods

This article will explain how to solve different issues with setting up dynamic period. This article will use a standard sample database for illustration. The hierarchies are setup as natural hierarchies with combined keys to ensure unique key values. The following tools will be used:

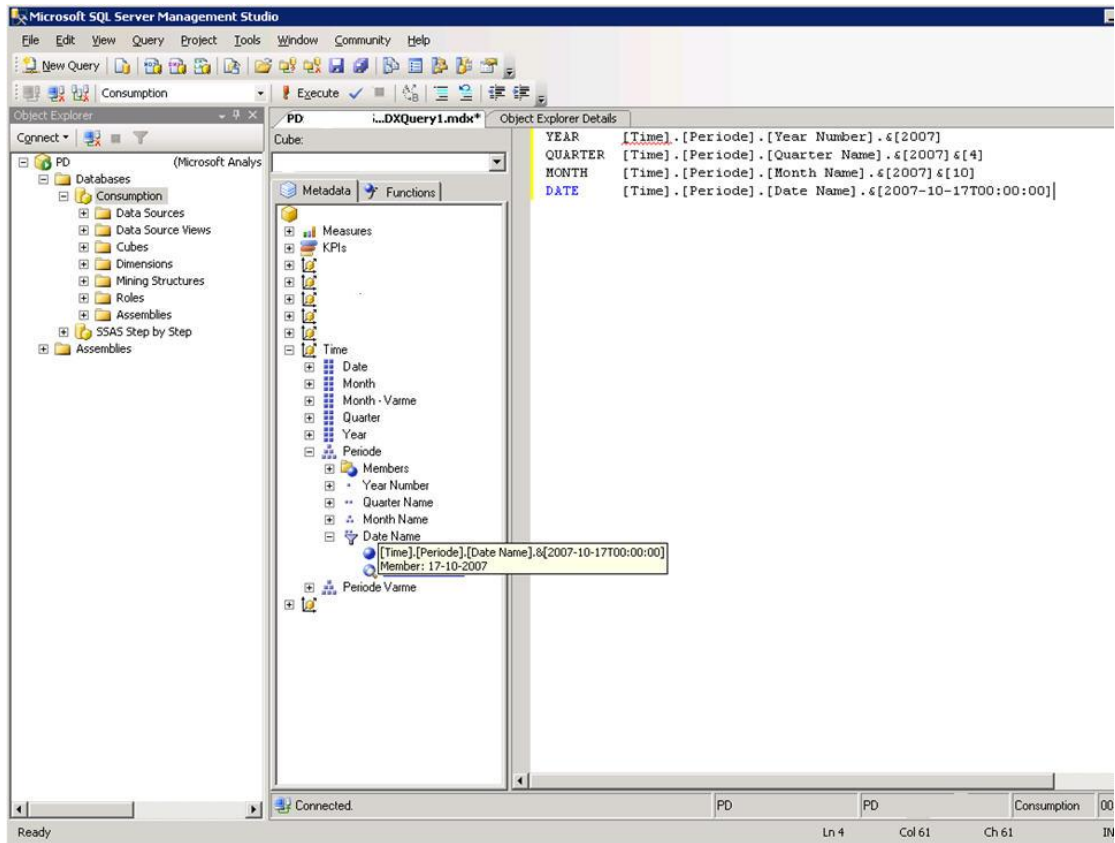
- Period Table Task (custom SSIS task)
- Analysis Services MDX Query in SQL Server Management Studio (SSMS 2005)
- LogMDX

Analysis Services MDX Query:

To make sure that you have the correct syntax of the dynamic time follow the description below and have a look at the MDX.

- Open SSMS and connect to Analysis Services
- Open and Analysis Services MDX Query – there should be a button in your toolbar
- Select to use the correct cube database and cube
- Find your period dimension and your hierarchy
- Now drag and drop a member from your wanted attribute to the text area

You should now see the MDX that the attribute makes and your Timedef should reflect that. On the image a member is dragged from year, quarter, month and date level:



The following Timedef will ignore the hh:mm:ss because keys are not used to describe the date level, instead the members of the attribute are described:

- #|TimeDef:[<>].[Q<>].&[.]| #

If keys are used to describe all levels the Timedef would look like this:

- #|TimeDef:&[<>].&[.]&[.]&[T00:00:00]| #.

LogMDX:

If using build 3232 or higher you can turn on LogMDX in TARGIT Management Studio prior to this build you should edit Settings.xml (located in \TARGIT\ANTServer\Settings) and change logmdx="false" to logmdx="true". If using a previous version of TARGIT add a REG_DWORD to HKEY_LOCAL_MACHINE\Software\TARGIT\ANTserver\<instance> and set the value to 1.

Note: Always remember to set LogMDX to false when done setting up dynamic period, because this is a very heavy logging that is not wanted on a production server.

Creating a dynamic Calendar Period

This section shows how to generate a period dimension with Year – Quarter – Month – Day levels and how to setup dynamic periods on these.

The table created in the sample database by using Period Table Task is setup like this:

Column Name	Data Type	Allow Nulls
TheDate	datetime	<input checked="" type="checkbox"/>
DateNumber	int	<input checked="" type="checkbox"/>
QuarterNumber	int	<input checked="" type="checkbox"/>
MonthNumber	int	<input checked="" type="checkbox"/>
DateName	nvarchar(50)	<input checked="" type="checkbox"/>
YearName	nvarchar(50)	<input checked="" type="checkbox"/>
QuarterName	nvarchar(50)	<input checked="" type="checkbox"/>
MonthName	nvarchar(50)	<input checked="" type="checkbox"/>
YearNumber	int	<input checked="" type="checkbox"/>

The data in the table will look like this:

```

1 SELECT TheDate, YearNumber, YearName, QuarterNumber, QuarterName, MonthNumber, [MonthName],
2     DateNumber, [DateName] FROM wdpostingperiod
3 WHERE TheDate > '2000-12-25' AND TheDate < '2001-01-05'
4 ORDER BY TheDate

```

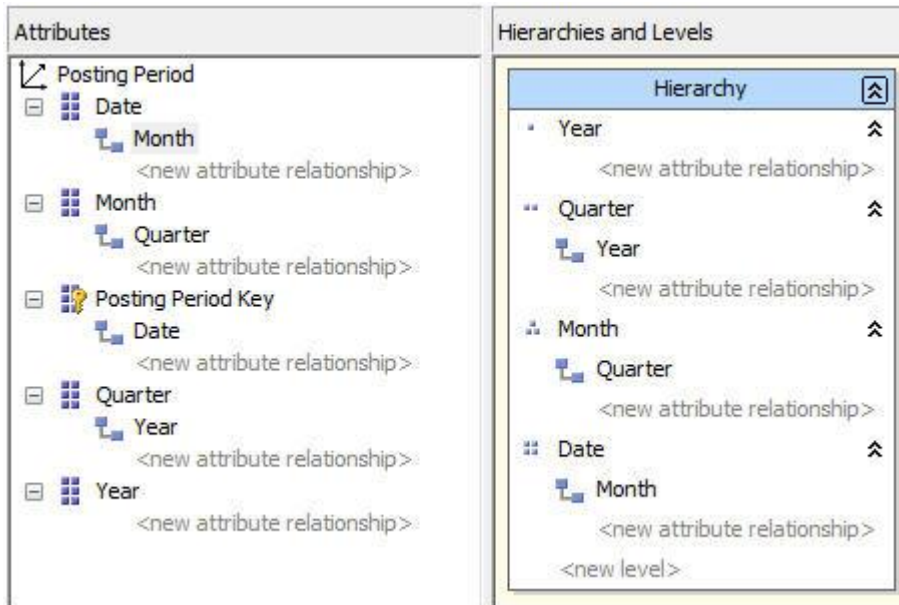
	TheDate	YearNumber	YearName	QuarterNumber	QuarterName	MonthNumber	MonthName	DateNumber	DateName
1	2000-12-26 00:00:00.000	2000	2000	4	Q4	12	Dec	20001226	26-12-2000
2	2000-12-27 00:00:00.000	2000	2000	4	Q4	12	Dec	20001227	27-12-2000
3	2000-12-28 00:00:00.000	2000	2000	4	Q4	12	Dec	20001228	28-12-2000
4	2000-12-29 00:00:00.000	2000	2000	4	Q4	12	Dec	20001229	29-12-2000
5	2000-12-30 00:00:00.000	2000	2000	4	Q4	12	Dec	20001230	30-12-2000
6	2000-12-31 00:00:00.000	2000	2000	4	Q4	12	Dec	20001231	31-12-2000
7	2001-01-01 00:00:00.000	2001	2001	1	Q1	1	Jan	20010101	01-01-2001
8	2001-01-02 00:00:00.000	2001	2001	1	Q1	1	Jan	20010102	02-01-2001
9	2001-01-03 00:00:00.000	2001	2001	1	Q1	1	Jan	20010103	03-01-2001
10	2001-01-04 00:00:00.000	2001	2001	1	Q1	1	Jan	20010104	04-01-2001

When building the hierarchy use the following Key and Name columns:

- Year attribute:
 - Key: YearNumber
 - Name: YearName
- Quarter attribute:
 - Key: YearNumber + QuarterNumber
 - Name: QuarterName
- Month attribute:
 - Key: YearNumber + MonthNumber
 - Name: MonthName
- Date attribute:
 - Key: DateNumber
 - Name: DateName

After dragging the attributes into your hierarchy in the correct order you need to assign the attribute relationships. Having attribute relationships between every level in a hierarchy makes the hierarchy strong and enables significant server optimizations.

When done the hierarchies will look like this:

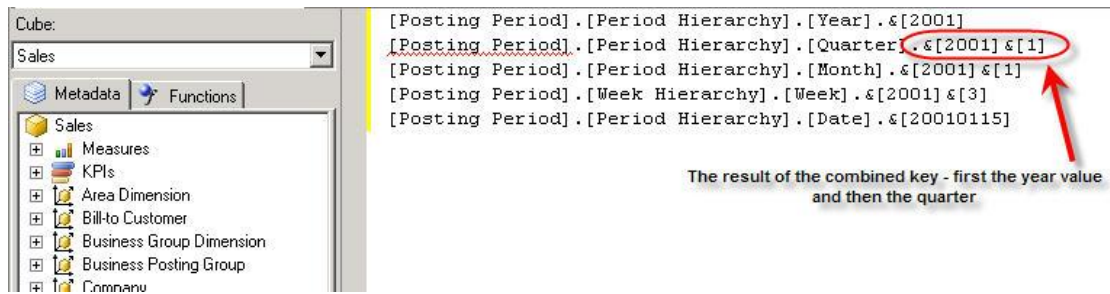


Note: Remember to set dimension type to Time and attribute types to years, quarters, months and days.

Hint: Before starting to create the Timedef make sure that the hierarchies are working as intended by browsing them in the dimension browser. Start by setting the following Timedef and then make corrections to get it to work on all levels:

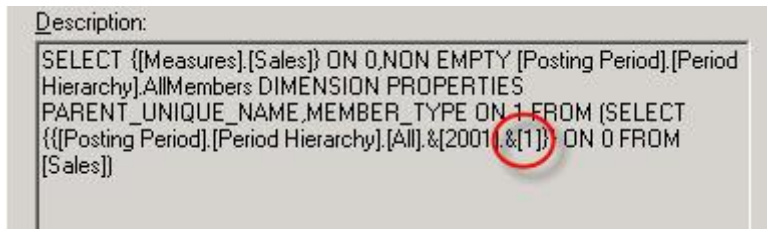
- Year-Quarter-Month-Date hierarchy: #|TimeDef:&[<>].&[<>].&[< >].&[<>]]#

When testing the following setup dynamic periods will work on the year level but fail when testing Quarter. Use Analysis Services MDX Query in SSMS to see what MDX TARGIT needs to create and turn on LogMDX to see the MDX that TARGIT creates in the Event Viewer. This is the result from the MDX Query: (January 15, 2001 has been used as point of origin since the test data is limited to December 2000 and January 2001)



This shows the MDX TARGIT needs to create for dynamic periods to work on the different levels.

This is the result of the TARGIT MDX with the current Timedef when setting criteria to this Quarter (Specified dynamic data origin to January 15, 2001):



As you can see in this screenshot TARGIT creates &[1] MDX for the quarter level. This should have been &[2001]&[1] as we saw in the previous screenshot of the MDX Query from SSMS.

Therefore some changes should be made to the Timedef. Instead of using &[<>] on the quarter level, use &[<YYYY>[Q>]. Furthermore you need to change the month level where you also used combined keys.

So now Timedef will look like this:

- Year-Quarter-Month-Date hierarchy: #|TimeDef:&[<>].&[<YYYY>[Q>].&[<YYYY>[M>].&[<>]]|#

Now dynamic periods work at all levels in both hierarchies except the date level. This is how the MDX looks when trying to use dynamic periods on the date level: (date origin is still set to January 15, 2001)

```

Description:
SELECT {[Measures].[Sales]} ON 0, NON EMPTY [Posting Period].[Period
Hierarchy].AllMembers DIMENSION PROPERTIES
PARENT_UNIQUE_NAME, MEMBER_TYPE ON 1 FROM (SELECT
{[Posting Period].[Period Hierarchy].[All].&[2001]. &[2001]&[1].&[2001]&[1].
&[15]} ON 0 FROM [Sales])

```

This shows that TARGET creates &[15] MDX for the date level – but the key used at the date attribute is 20010115, so this is what the date level in the Timedef will have to reflect. In order to do that the Timedef will have to be changed to &[<YYYYMMDD>]

So now Timedef will look like this:

- Year-Quarter-Month-Date hierarchy: #|TimeDef:&[<>].&[<YYYY>]&[Q>].&[<YYYY>]&[M>].&[<YYYYMMDD>]|#

Now dynamic periods work on all levels.

Setting up Fiscal Period

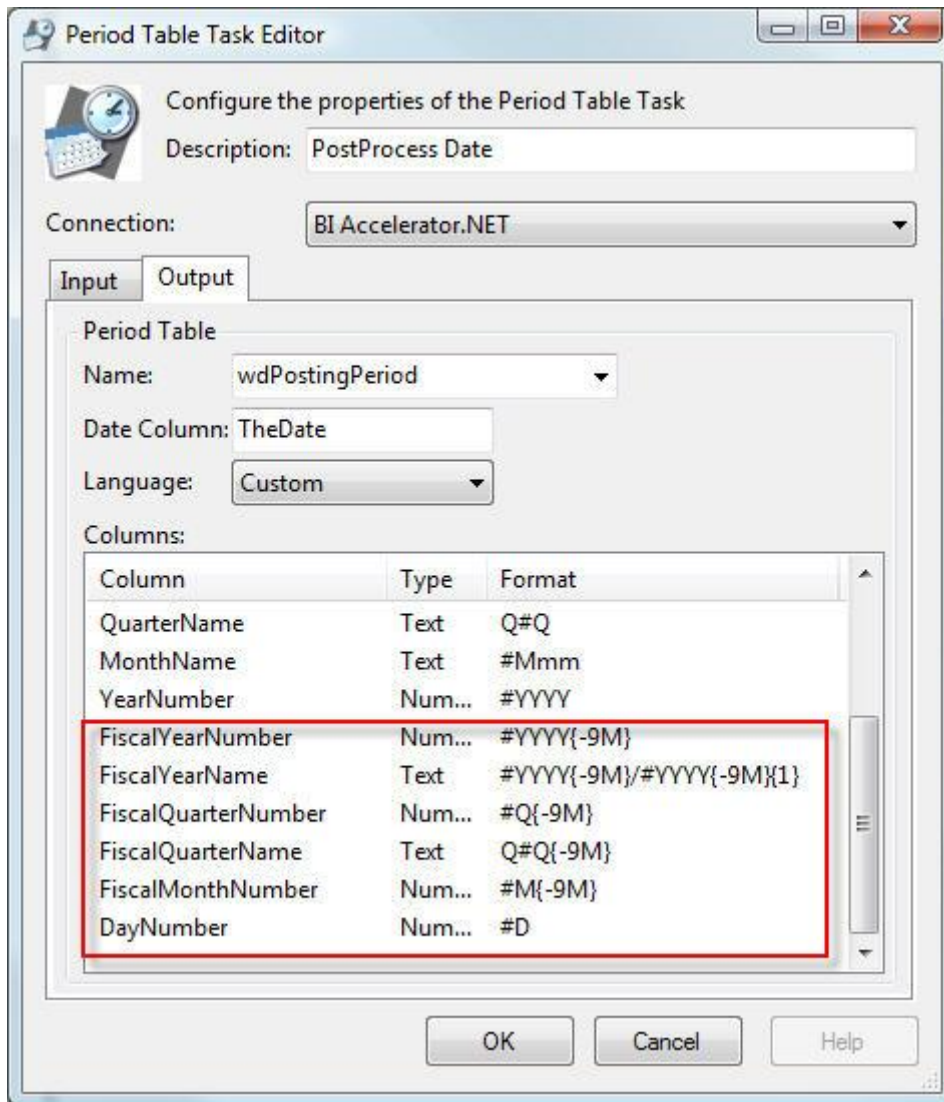
This example shows how to expand the dimension with a new hierarchy that supports fiscal calendar which in this example begins 1st of October. To setup dynamic periods the offset feature will be used to build the Timedef.

- #|TimeDef:&[<>].&[Q<>].&[<>].[,Offset:-6|#

In this example 6 months is subtracted from the system date before evaluating the fiscal year.

Note: It should be noted that the dimension that is sliced with an offset needs to be structured properly, so that the user will see the fiscal year as expected. So if the fiscal year starts in June (6th month) this month should have the key-value of 1, indicating that this is the first month of the new year. This will make the offset value of -6 properly find the month since the key value will be 6 less than 'expected' from a normal system date evaluation.

First you should create the needed key and name fields necessary to build the hierarchy. Use the Period Table Task in the SSIS package to do this.



As you can see in the picture the following columns have been added:

- FiscalYearNumber: #YYYY{-9M}
- FiscalYearName: #YYYY{-9M}/#YYYY{-9M}{1}
- FiscalQuarterNumber: #Q{-9M}
- FiscalQuarterName: Q#Q{-9M}
- FiscalMonthNumber: #M{-9M}
- DayNumber #D

In this case {-9M} should be used as an offset because the first 9 months of the calendar year belongs to the fiscal year that starts the year before. Also create a new DayNumber because this is needed to build a new Date attribute, since the old one will not work as intended with an offset in the Timedef. This will provide the following new columns in the period table:

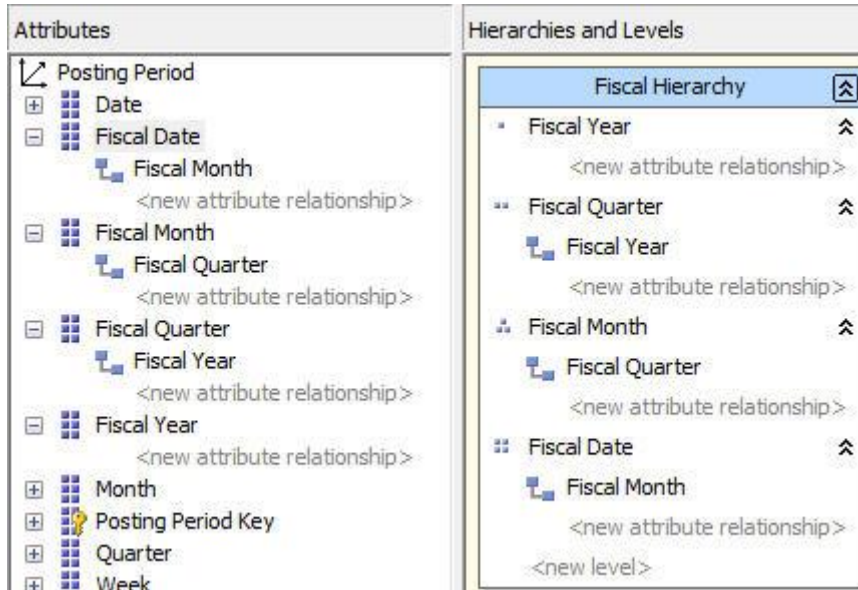
TheDate	FiscalYearNumber	FiscalYearName	FiscalQuarterNumber	FiscalQuarterName	FiscalMonthNumber	DayNumber
2000-09-26 00:00:00.000	1999	1999/2000	4	Q4	12	26
2000-09-27 00:00:00.000	1999	1999/2000	4	Q4	12	27
2000-09-28 00:00:00.000	1999	1999/2000	4	Q4	12	28
2000-09-29 00:00:00.000	1999	1999/2000	4	Q4	12	29
2000-09-30 00:00:00.000	1999	1999/2000	4	Q4	12	30
2000-10-01 00:00:00.000	2000	2000/2001	1	Q1	1	1
2000-10-02 00:00:00.000	2000	2000/2001	1	Q1	1	2
2000-10-03 00:00:00.000	2000	2000/2001	1	Q1	1	3
2000-10-04 00:00:00.000	2000	2000/2001	1	Q1	1	4
2000-10-05 00:00:00.000	2000	2000/2001	1	Q1	1	5

The new attributes and then the new hierarchy are now ready to be build. Remember to set the correct types on the attributes and to create attribute relationships.

Use the following Key and Name columns:

- Fiscal Year:
 - Key: FiscalYearNumber
 - Name: FiscalYearName
- Fiscal Quarter:
 - Key: FiscalYearNumber + FiscalQuarterNumber
 - Name: FiscalQuarterName
- Fiscal Month:
 - Key: FiscalYearNumber + FiscalMonthNumber
 - Name: MonthName
- Fiscal Date:
 - Key: FiscalYearNumber + FiscalMonthNumber + DayNumber
 - Name: DateName

When done the hierarchy should look like this:



When using the MDX Query in SQL Server Management Studio the new date level will look like this:

- [Posting Period].[Fiscal Hierarchy].[Fiscal Date].&[2000]&[4]&[15]

Point of origin is still January 15, 2001 as in example 1, but the key to this date is now &[2000]&[4]&[15]. This is because FiscalYearNumber and FiscalMonthNumber are used in the combined key and this will also be the values created in the MDX by TARGIT as a result of the offset in the Timedef.

This is the Timedef from example 1 that was used on a similar hierarchy:

- #|TimeDef:&[<>].&[<YYYY>]&[Q>].&[<YYYY>]&[M>].&[<YYYYMMDD>]|#.

Year, quarter and month level hasn't changed (except using some other key values) so the Timedef on these levels should be the same. But instead of using DateNumber as key on the date level it is now setup using a combined key, this will have to be reflected in the Timedef.

The combined key should look like this:

- &[<YYYY>]&[M]&[D>]

Then all that needs to be added to the timedef is the offset value, so the final Timedef should look like this:

- #|TimeDef:&[<>].&[<YYYY]&[Q>].&[<YYYY]&[M>].&[<YYYY]&[M]&[D>],Offset:-9|#

Now dynamic periods work with the fiscal period hierarchy.

Changing the Dynamic Period configuration

This section gives two examples of changes to the Dynamic Period configuration.

Using Tablelookup to change month focus

This section shows how to create a hierarchy that will enable the option to control when a view should change focus from last month to this month. In this example the view should change focus from last month to this month the last Tuesday in the current month, but it might as well be the 10th in every month. The only limit here is the developers ability write the necessary code. To setup dynamic periods the TableLookup feature will be used to build the Timedef.

- #|TimeDef:[<>].[<>],TableLookup:tablename|#

The tablename is the name of a table in the system database that must contain at least:

- THEDATE - a date field containing the date to look up. If you only have this field, it will copy the data from the original table if the query is made at a level where this data is needed.

Optional fields:

- YEAR - the value to substitute the year with.
- HALFYEAR - the value to substitute half year with.
- QUARTER - the value to substitute quarter with.
- MONTH - the value to substitute month with.
- WEEK - the value to substitute week with.
- DAY - the value to substitute day with.

If the dimension contains a level type that is not included in the table, the default mechanism applies for these levels. So it is possible to make 1-1-2006 look and work like 1-1-2007 if a lookup table is created and 1-1-2006 is put in the date field, and 2007 is added in the year column.

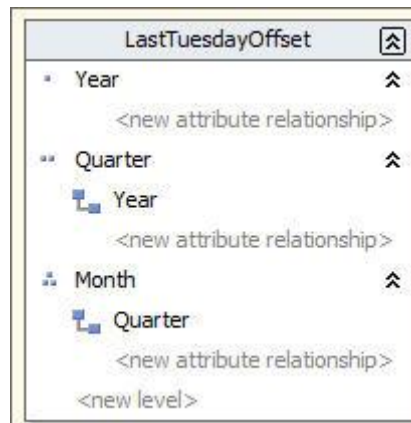
So, a new table is needed where values are defined to replace key values that is created in the MDX query. The table should be located in the TARGIT system database that in most cases is recommended to move to the stage database.

Below is an example of the values needed in this example. The values are from a table named TARGIT_OFFSETLastTuesday. The name of the table will later be used in the Timedef.

	TheDate	Year	Quarter	Month
1	2001-01-25 00:00:00.000	2000	4	12
2	2001-01-26 00:00:00.000	2000	4	12
3	2001-01-27 00:00:00.000	2000	4	12
4	2001-01-28 00:00:00.000	2000	4	12
5	2001-01-29 00:00:00.000	2000	4	12
6	2001-01-30 00:00:00.000	2001	1	1
7	2001-01-31 00:00:00.000	2001	1	1
8	2001-02-01 00:00:00.000	2001	1	1
9	2001-02-02 00:00:00.000	2001	1	1
10	2001-02-03 00:00:00.000	2001	1	1

As the screenshot shows the year key value for January 25, 2001 will be replaced with '2000', the quarter value with '4' and the month value with '12'. This is because until the last Tuesday in January 2001 is reached the dynamic period should return to the previous year, quarter and month.

After creating the new table the hierarchy may be built. However, a new hierarchy doesn't have to be build. A copy of the Year-Quarter-Month-Day hierarchy that was created in the section 'Creating a dynamic Calendar Period' may be made. Remove the day level from the hierarchy since it will not be needed. So the hierarchy will end up like this:



This is the Timedef from the section 'Creating a dynamic Calendar Period' that was used on a similar hierarchy:

- #|TimeDef:&[<>].&[<YYYY>]&[Q>].&[<YYYY>]&[M>].&[<YYYYMMDD>]|#

Since the Date level is no longer a level in the hierarchy this part of the Timedef can be removed.

Then all that needs to be added to the Timedef is the TableLookup, so the final Timedef should look like this:

- #|TimeDef:&[<>].&[<YYYY>]&[Q>].&[<YYYY>]&[M>],TableLookup:TARGIT_OFFSETLastTuesday|#

This hierarchy should only be used for setting dynamic period criteria or in comparisons. So if a period hierarchy is still wanted as a part the object then one of the hierarchies that were build in the sections 'Creating a dynamic Calendar Period' and 'Setting up Fiscal Period' should be used.

Making offsets in Periods

A major issue with week and dynamic periods is that a week can't be a part of multiple attribute members of the parent attribute. In this case we need to make sure that any week isn't a part of 2 different years, like if week 1 begins in December in the previous year or the other way around if week 52/53 ends in the new year.

To handle this, a new year key is needed in the period table and of course a key to weeks.

These new values should follow ISO 8601 standard.

Add the following to the Period Table Task:

- WeekYear #WYYY (4 digit week year - ISO 8601)
- WeekNumber #WW (2 digit week number - ISO 8601)
- WeekName Week #WW

This will provide the following new columns in the period table:

	TheDate	YearNumber	WeekYear	WeekNumber	WeekName
1	2001-12-26 00:00:00.000	2001	2001	52	Week 52
2	2001-12-27 00:00:00.000	2001	2001	52	Week 52
3	2001-12-28 00:00:00.000	2001	2001	52	Week 52
4	2001-12-29 00:00:00.000	2001	2001	52	Week 52
5	2001-12-30 00:00:00.000	2001	2001	52	Week 52
6	2001-12-31 00:00:00.000	2001	2002	1	Week 01
7	2002-01-01 00:00:00.000	2002	2002	1	Week 01
8	2002-01-02 00:00:00.000	2002	2002	1	Week 01
9	2002-01-03 00:00:00.000	2002	2002	1	Week 01
10	2002-01-04 00:00:00.000	2002	2002	1	Week 01
11	2002-01-05 00:00:00.000	2002	2002	1	Week 01

Notice the different YearNumber and WeekYear on December 31th, 2001, because that week 1 begins this date.

Now build the hierarchy using the following attributes:

- Week Year:
 - Key: WeekYear
 - Name: WeekYear
- Week:
 - Key: WeekYear+ WeekNumber
 - Name: WeekName
- Date:
 - Key: DateNumber
 - Name: DateName

Remember to set the correct type on the attributes and to create attribute relationships where needed.

Since dates are being moved from one year to another, dynamic periods will need to be setup using TableLookup. But all the needed dates should be in the period table. They just needs to be inserted into a new table.

- TheDate should be inserted as TheDate
- WeekYear should be inserted as Year
- WeekNumber should be inserted as Week

- DateNumber should be inserted as Day

Finally the Timedef should be the following:

- #|TimeDef:&[<>].&[<YYYY]&[W>].&[<>],TableLookup:TARGIT_Week|#

Network Load Balancing

This section provides information on how to set up load balancing on the server running TARGIT NET.

TARGIT NET load balancing

Load balancing on one or more servers running TARGIT NET is a built-in feature of TARGIT. When requests are made, they are distributed evenly among the virtual directories, which lead to a performance increase. To setup load balancing follow these steps:

- Create the file apps.xml in the TARGIT NET folder (typically located at C:\inetpub\wwwroot\TARGITNET) on the TARGIT NET server.
- Add these lines to apps.xml (the number of virtual directories depend on the amount of memory available on the server):
 - <apps>
 - <app url="http://[Server name]/TARGITNET1"/>
 - <app url="http://[Server name]/TARGITNET2"/>
 - <app url="http://[Server name]/TARGITNET3"/>
 - </apps>
- Create application pools for each of the virtual directories in the IIS.
- Create the corresponding virtual directories TARGITNET1, TARGITNET2 etc. in the IIS.
- Right-click each of the virtual directories and select 'Properties'. Each virtual directory needs to be assigned its own application pool in the application pool drop down in the 'Virtual Directory' tab.
- Make sure that the virtual directories have the same settings as the virtual directory created by TARGIT NET e.g. disabled anonymous access and enabled windows authentication.
- The TARGIT NET server is now set up to use load balancing. If any problems are experienced try resetting the IIS.

Note: This feature requires an enterprise server license.

Optimization

This section provides information about optimizing the server environment.

Configuring User Preferences

When a new user is added the user preferences are copied from the UserPreferences.xml file located in the ...\\ANTserver\\Settings\\Defaults folder to the personal folder for the user (...\\ANTserver\\VFS\\Personal\\[user]\\Settings\\Preferences.xml). This provides the option to customize the initial user preferences for new users by changing the UserPreferences.xml file or changing individual users' existing user preferences. The settings for the xml files are shown in the table below:

Setting	Explanation
weekstart sunday	Per default, the calendar settings of TARGIT is set to start weeks on Mondays. Setting this value to "true" changes weeks to start on Sundays. Default is "false".
crosstab scrollheaders	Per default, only data fields of tables are scrollable leaving column and row headers viewable when scrolling. Setting this value to "true" causes entire tables, including column and row headers, to be scrollable. Default is "false".
compact hierarchies	Per default, tables with multi-level dimensions will display the dimension hierarchy with one column or one row for each level in the dimension. The 'Compact hierarchies' option will cause all levels of a multi-level dimension, to be displayed in a single column or row. Setting this value to "true" enables this feature in all new objects. Default is "false".
autofiltercriteria criteriabar	When this value is set to "true", the criteria bar drop-lists are filtered to show only the dimension members that would be present in a data object being influenced by the selected criteria. Default is "false".
criteriaeditor	When this value is set to "true", the Criteria editor in the Smartpad is filtered to show only the dimension values that would be present in a data object being influenced by the selected criteria. Default is "false".
autoexpandcharttype	When this option is enabled and an object is auto-expanded for instance as a result of a drill action or by applying criteria, the type of chart will automatically change in accordance with the level of expansion. This setting has three values: "always", auto expands an object and changes the chart type to the one most often used for the dimension according to the built in intelligent analysis. This is done when applying a criterion, when TARGITing or drilling. If for example the criterion JEANS is applied (from the criteria editor/bar, from TARGITing or from drilling) the object is auto-expanded to show all children of the JEANS hierarchy level and the chart type that is most often used for this dimension is used to display all the children. The value "targiting" also auto expands the object and changes the chart type, but only when TARGITing. The value "never" disables all auto expansion and changing chart type. Default is "targiting".
drillpad visible	Three values are available for the drillpad mode: "always", which makes it

	possible to enable the drillpad by clicking it. This splits the Smartpad in two - one part for the selected tab in the Smartpad and one for the drillpad. The drillpad may be disabled again by clicking the tab again. "onuse" shows the drillpad when drilling takes place. "never" does not change to the drillpad on drilling and the drillpad tab has to be clicked in the Smartpad to show the drillpad. Default is "onuse".
memberlist enabled	When this value is set to "true" a threshold is put on the number of members shown in criteria bar drop lists. If the value is set to "false" all members are shown. Default is "true".
threshold	The number of members shown may be specified in this value field. Default is "50"
print explanationlastpage	When using the Print Special options: "Chart and explanation" or "Data and explanation" explanations are by default printed at the bottom of each page. Setting this value to "true" allows the user to print the explanation on the last page only. Note that if the explanation spans more than 50% of the page height, it will automatically be moved to the last page. Default is "false".
reporteditor snaptogrid	When placing elements in a report, the placement is decided by an underlying grid. Setting a custom size may be enabled by setting this value to "true". If the setting is set to false, the grid size is set to 4 x 4. Default is "true".
snapx	Step size in pixels along the X-axis. Default is "4".
snapy	Step size in pixels along the Y-axis. Default is "4".
startup document	If a specific analysis or report should be opened upon login the VFS path may be entered e.g. "vfs://global/Sales/Sample Revenue.xview.
smartpad visible	Changing this value to "false" hides the Smartpad. Default is "true".
smalltabs	Setting this value to "true" changes the Smartpad to show small icons instead of the regular tabs. Use this function to save space in the Smartpad, which is useful for some of the space demanding functions. Default is "false".
width	Sets the width of the Smartpad. Default is "180".
toolbar visible	Changing this value to "false" hides the toolbar. Default is "true".
statusbar visible	Changing this value to "false" hides the status bar. Default is "true"
sourcedata groupbytype	Setting this value to "true" causes the source data tab in the Smartpad to be split into a measures section and a dimension section. Default is "false".
sortbytype	Setting this value to "false" lists the measures and dimensions in the source data tab in the Smartpad in alphabetical order. If the value is set to true the measures and dimensions are sorted according to type (dimensions first and then measures). Default is "true".
displayfolderfirst	Setting this value to "false" lists the measures, dimensions and folders in the source data tab in the Smartpad in alphabetical order.. Changing the value to

	"true" displays folders first. Default is "true".
documents foldersfirst	Setting this value to "false" lists documents and folders alphabetically in the Documents tab in the Smartpad or list them by type if that property is set to true. Changing the value to "true" displays folders first. Default is "true".
sortbytype	Setting this value to "true" lists documents and folders according to type in the Documents tab in the Smartpad. "false" lists the documents alphabetically. Default is "false".
startupfolder	This value specifies which of the 4 main folders (Favorites, Shared, Personal and Recent) that should be opened by when logging in. Default is "Favorites".

If a user's user preferences should be used as a template for new users, the content of the ...\\ANTserver\\VFS\\Personal\\[user]\\Settings\\Preferences.xml file may simply be copied to the ...\\ANTserver\\Settings\\Defaults\\UserPreferences.xml file.

Custom menu item for export

A custom menu item used to export table data may be created by creating a new ObjectMenu.XML file and save it in ...\\ANTserver\\Settings\\External with the following content:

```
<item id="{BD7C661C-A96D-4ad0-8789-E2BEEAE569E2}" name = "New Export to
Notepad" type="fileassociation">
  <export format="csv" extension="txt">
    <fieldseparator>;</fieldseparator>
    <textqualifier"></textqualifier>
    <newline>CRLF</newline>
    <thousandseparator>.</thousandseparator>
    <decimalseparator>,</decimalseparator>
    <numberformat reversesign="false"
astime="false">("&#,##0.00")</numberformat>
  </export>
</item>
```

The above example creates a new menu item with the name "New Export to Notepad". Clicking it makes a table data export to a .txt file with the csv format. Like the TARGIT built-in export wizard several format settings may be set. It is in fact possible to select the desired format in the wizard, then save it as default and go to ...\\ANTserver\\VFS\\Personal\\USER\\Settings\\Export.xml and copy the format from this file to the custom file. The number formatting is standard MDX format string format.

To make date formatting "astime" must be set to "true" and the relevant options must be used ("sourcetimeunit" and "displaytimeunit" may take the values days, hours, minutes, seconds and miliseconds):

```
<numberformat reversesign="false" astime="true" sourcetimeunit="days"
displaytimeunit="hours"/>
```

Note that a license with the Corporate Communication module is required to make a custom menu item for export.

Client

Any issues and installation guidelines on the client side are explained in this chapter.

System recommendations

In order for TARGIT to perform well some System recommendations should be fulfilled. Notice that the following recommendations are for the client components handled in this guide only. For further information about other components please refer to the specific documentation for these components. Recommendations for server components may be found in the section "System recommendations" on page 3.

TARGIT Windows Client

TARGIT Server requires a business class computer running Windows XP, Windows Vista or Windows 7. TARGIT Server will also run on Windows server 2003 and Windows Server 2008 but these operating systems are not recommended as client production environments. The system must have Microsoft .NET Framework version 3.5 SP1 installed.

TARGIT Management Studio

TARGIT Management Studio requires a business class computer running Windows XP, Windows Vista or Windows 7. TARGIT Management Studio will also run on Windows server 2003 and Windows Server 2008.

TARGIT NET Web Client

TARGIT NET Web Client requires a business class computer running Internet Explorer 7.0 or higher, Chrome, Firefox or Safari. To display the Thumbnail Navigator the Microsoft Silverlight application framework must be installed.

Note: Internet Explorer 8 or higher is recommended due to minor visual deviations in the TARGIT NET user interface when run in Internet Explorer 7.

TARGIT Desktop

TARGIT Desktop requires a business class computer running Windows XP, Windows Vista or Windows 7. TARGIT Desktop will also run on Windows server 2003 and Windows Server 2008 but these operating systems are not recommended for production environments. The system must have Microsoft .NET Framework version 2.0 and have access to TARGIT Server via TCP/IP through LAN, WAN or the Internet.

Client Installation

This section includes information about the client installations -TARGIT Windows client, TARGIT Management Studio and TARGIT Desktop and also how to run TARGIT NET.

Installing TARGIT Windows Client

To install TARGIT Windows Client run the TARGITBISuite.msi file. This starts the installation wizard. The typical installation type will provide the most common features, so choose this option and remember to deselect TARGIT Server and TARGIT Management Studio on the next screen.

When TARGIT Windows Client is installed click the finish button and the logon screen is shown. Type the name of the server running the TARGIT Server in the 'Log on to' field. Before logging on also make sure that the appropriate authentication method is selected.

Running TARGIT NET

When TARGIT NET has been installed on the server a connection to TARGIT NET is made by opening a browser and typing: `http://servername/virtual directory`. *Servername* is the name of the server running TARGIT NET and by default *virtual directory* is called TARGITNET, but this may have been changed during installation.

Internet Explorer settings with Windows authentication

Please note that if you are using Windows authentication in your TARGIT solution you must also make sure that the end users' Internet Explorer browsers are configured to use Windows authentication. To ensure this open your Internet Explorer browser and go to the Tools | Internet Options menu and select the Advanced tab. Make sure that the option 'Enable Integrated Windows Authentication' has been checked.

Internet Explorer security settings

Some security settings in Internet Explorer may prevent you from opening pages on your intranet. In the Internet Explorer browser go to the 'Tools | Internet Options' menu and select the 'Security' tab. You should add `http://[Server name]` (server name is the name of the server running *TARGIT NET*) to your local Intranet zone.

Changing UI language in the NET client

The language of the User Interface in the TARGIT NET client is controlled by the language settings of the individual Internet Explorer browser. To change the language you should go to the browser's 'Tools | Internet Options' menu. On the 'General' tab of the shown dialog click the 'Languages' button to allow you to manage the 'Language Preferences'. The top most language on the Language list will determine the language of the TARGIT NET client's user interface. If your preferred language is not on the list, you may need to add it via the 'Add' button. After changing the language restart TARGIT NET to apply the change.

Note: The above settings refer to Internet Explorer. For similar settings in other browsers please refer to the browser help section.

Installing TARGIT Management Studio

To install TARGIT Management Studio run the TARGITBISuite.msi file. This will start the installation wizard. The typical installation type will provide the most common features, so choose this option and remember to deselect TARGIT Server and TARGIT Windows Client on the next screen.

Installing TARGIT Desktop

To launch the TARGIT Desktop client from the TARGIT Windows client you should go to the 'Tools | Launch Desktop' menu. This will launch the Desktop client, or, if the TARGIT Desktop client hasn't been installed yet it will launch the TARGIT Desktop installation wizard.

The TARGIT Desktop client may also be launched/installed by right-clicking any object in an existing analysis and choose 'Object | Desktop | Add to desktop' from the context menu. This latter method is also the only way to install the TARGIT Desktop client from the TARGIT NET client. Once the application detects that no TARGIT Desktop client is currently installed it will automatically start the installation process.

The TARGIT Desktop client traces the URL used for the first initial install. When installing from TARGIT NET the TARGIT Desktop gets the URL directly from the TARGIT NET web service. This is not the case for the TARGIT Windows client, because it doesn't have direct access to the TARGIT NET web service. Therefore, it is required that the 'Web Service URL' is set in the General section of the setup module in TARGIT Management Studio on the server running the TARGIT Server. The URL must be the address of the TARGIT NET web service, e.g. 'http://*server name*/TARGITNET'. Note that 'localhost' shouldn't be used as server name even if the TARGIT Server and TARGIT NET web service are on the same machine.

Note: When installing the TARGIT Desktop client, the user must have access and access rights to TARGIT NET in the moment of install.

Upgrading

This chapter gives an overview of what to do to prepare an upgrade and explains in detail how to perform upgrades on both server and client side.

Preparing an upgrade

Before starting an upgrade some minimum precautions should be taken to ensure that no data loss occurs due to the process:

- An upgrade should be performed at a time which would affect as few users as possible.
- If there are any clients open, save the work being done and close them to ensure that no unsaved data is lost. Check the 'Logins'-module in TARGIT Management Studio to get an overview of clients logged in.
- When upgrading TARGIT Server a backup of 'C:/Program files/TARGIT' folder should be taken, in order to revert back to the previous settings in case the upgrade ends with an error. Backup of other settings and folders may be necessary. For more information on backing up the TARGIT solution see the section "Backing up and recovering a Server Installation".
- For TARGIT NET the file Web.config located in C:\inetpub\wwwroot\TARGITNET must also be backed up, since it contains all configurations.
- If a server switch is planned when making the upgrade, the old installation must be migrated to the new server before making the upgrade, since installing the new version on the new server and copying the old installation files to the new server does not update the file structure, which an upgrade may do.
- If the TARGIT Server is configured to use standard authentication and an upgrade from a build prior to 4614 is performed, the license must be updated before the upgrade takes place. Otherwise access is denied to TARGIT Management Studio after the upgrade. If upgrading without updating the license first, the License.xml file must be replaced with a valid license afterwards.

Note: During the upgrade process a restart of the system at least once may be necessary. The restart may be avoided by running the command 'iisreset' from the command line before starting the upgrade.

Upgrading a Server Installation

This section describes how to upgrade the two server installations TARGIT Server and TARGIT NET. Make sure that the steps from the section "Preparing an upgrade" have been followed before starting any upgrade.

TARGIT Server upgrade

One of the easiest ways to keep TARGIT Server up-to-date is to go to the Download Center on www.mytargit.com and download the latest version of the TARGIT Business Intelligence Suite installation file and run it to start the installation wizard. The installation is straightforward and will also upgrade the TARGIT Windows Client and TARGIT Management Studio client if they are present on the server.

To verify that the upgrade was successful check the build number in the lower left corner of the login screen.

TARGIT NET upgrade

TARGIT NET must be upgraded in a separate process and its version must match with the TARGIT Server. Firstly, any TARGIT NET present on the system should be uninstalled before installing a new version. Trying to install on top of any existing TARGIT NET installation will prompt a message, asking the user to uninstall the previous installation before continuing. Uninstalling TARGIT NET may be done as follows:

- Go to Start Menu | Control Panel | Add or Remove Programs.
- Select 'TARGIT NET' from the list of installed applications and click on 'Remove' button provided for it. This uninstalls the existing version of TARGIT NET. Also, the folder C:\Inetpub\wwwroot\TARGITNET should be deleted before continuing with the upgrade.
- Now, install the desired version of TARGIT NET by following the steps as described in the section "Installing TARGIT NET".
- Remember if you previously made any changes to the Web.config file in C:\Inetpub\wwwroot\TARGITNET, then make sure that you copy the backed up Web.config to the new installation folder.

If you upgrade an older version of TARGIT NET on Windows Server 2003 some file types may be using .NET Framework 1.1 when they should be using 2.0. This is the case if your web site was running .NET Framework 1.1 when installing TARGIT NET. This detail may cause problems to show some of the icons and images in the client. So, after upgrading you should check the file types the following way:

- Go to Internet Information Services (IIS) Manager.
- Right-click the TARGIT NET virtual directory and select 'Properties'.
- Go to the 'Virtual directory' tab and select the 'Configuration' button. In the dialog that opens check that the 'Executable Path' is set to Framework 2.0 for the .aspx, .ashx, .asmx, .asax file extensions.
- If the extensions are still set to Framework 1.1 go to the 'ASP.NET' tab and change the ASP.NET version to 1.1 and click 'Apply'. Then change the version back to 2.0 and click 'Apply' again.
- Run 'iisreset' from the run menu and go back to check that the extensions are now set to Framework 2.0.

Note: When upgrading on Windows Server 2008 the installation files must be run as an administrator. For more information on this issue see the section "Installing TARGIT NET".

Upgrading a Client Installation

To upgrade TARGIT Windows client or TARGIT Management Studio follow the same procedures as described in the section "Upgrading a Server Installation". The installation will automatically detect a previous version of the windows client and upgrade it. If other components from the TARGITBISuite.msi file must be installed, then run the file again and modify the installation.

Upgrading TARGIT Desktop

TARGIT Desktop client relies on TARGIT NET technology. Hence, it is updated whenever TARGIT NET is updated. Each time TARGIT Desktop is started it checks if TARGIT NET has been upgraded. If it has, then TARGIT Desktop is also upgraded.

Silent Installation

Silent installation is a feature that automates installation of TARGIT. With silent installation you can impact the installation by choosing only the specific elements of the Suite which are relevant to the individual users. Through the use of parameters you will easily avoid installing too much e.g. avoid installing TARGIT Servers with all Windows client installations.

The parameters that may be used are (Note that commands are case sensitive):

ENTERPRISECLIENTCOMPONENT

0 = Not applied

1 = TARGIT windows client and TARGIT Management Studio are applied

ENTERPRISEMANAGER

0 = Not applied

1 = TARGIT Management Studio is applied

SERVERCOMPONENTS

0 = Not applied

1 = TARGIT Management Studio, TARGIT Server are applied

When running the msi, you will need to include all the parameters and indicate their applicability with either 0 or 1. The following is an example of a client installation where only TARGIT Windows client is installed.

```
msiexec /i TARGITBISuite.msi ENTERPRISECLIENTCOMPONENT=1  
ENTERPRISEMANAGER=0 SERVERCOMPONENTS=0 /quiet
```

Here is another example of a full server installation (TARGIT Windows Client, TARGIT Management Studio, TARGIT Server):

```
msiexec /i TARGITBISuite.msi ENTERPRISECLIENTCOMPONENT=1  
SERVERCOMPONENTS=1 /quiet
```

With the parameter /quiet the installation will be silent.

For more advanced control it is also possible to use a Windows Installer transform (.mst), and this is also possible for previous versions.

SharePoint Installation and Configuration

This chapter provides detailed information on installing TARGIT SharePoint WebPart on different versions of SharePoint. Note that this information focuses on installation and configuration of the web part and the TARGIT environment. For other issues relating to the SharePoint setup please refer to the documentation provided by Microsoft.

Introduction to TARGIT SharePoint WebPart

To integrate TARGIT with Microsoft SharePoint, a Web Part-component is available from the TARGIT download center. This component is installed and configured as a standard SharePoint Web Part, and may be integrated into either an existing SharePoint server solution, or deployed on a Microsoft Windows Server with enabled Microsoft Windows SharePoint Services. TARGIT SharePoint Integration allows end-users to run or create analyses, reports and use the other features available in TARGIT NET.

This chapter is divided into sections according to the versions of SharePoint, making it easier to address any problems once the SharePoint version has been identified.

Supported Microsoft SharePoint versions

The following versions of Microsoft SharePoint are supported:

- Microsoft Office SharePoint Portal Server 2003
- Windows Sharepoint Services 2.0
- Microsoft Office SharePoint Server 2007
- Windows SharePoint Services 3.0
- Microsoft Office SharePoint Server 2010
- Microsoft SharePoint Foundation 2010

Requirements

To be able to integrate TARGIT with SharePoint the following requirements must be met:

- Any of the above mentioned versions of SharePoint with the latest updates and service packs installed
- A TARGIT Portal Development Kit license
- Microsoft Windows Server 2003 or later versions with the latest updates and service packs installed. Note that the 2003 SharePoint family and Windows SharePoint Services 3.0 are not supported on Windows Server 2008.

- Microsoft Internet Information Services (IIS) 6.0 or later

Note: It is recommended to use Windows authentication when implementing the web part, since Windows authentication is integrated into SharePoint. Though not recommended standard authentication is supported.

SharePoint 2003 Family

Integrating with SharePoint Portal Server 2003

The following sections explain how to prepare the TARGIT environment for deployment of the TARGIT SharePoint WebPart and how to deploy the Web Part on SharePoint Portal Server 2003.

Configuring the TARGIT Environment

Note: Before integrating TARGIT with SharePoint make sure that the latest service pack is applied to SharePoint.

To setup TARGIT SharePoint WebPart it is required that you have a server running with TARGIT, specifically TARGIT Server, and that TARGIT is configured to use Windows Security. Next step is to install TARGIT NET. When installing TARGIT NET, make sure that it is installed as a virtual directory under the Default website in the Internet Information Services (IIS). In IIS also make sure that ports used for SharePoint and TARGIT NET are not the same.

After installation the following changes must be done to the web.config file:

- First of all you have to tell TARGIT NET that it is integrated with SharePoint. This is done by setting the SharepointMode Key value to "1". This value is found in the TARGIT NET web.config file and looks like this:

```
<add key="SharepointMode" value="1"/>
```

- Furthermore, if you are running TARGIT NET and SharePoint on the same server partitionResolverType="" must be added to the following line in the web.config file:

```
<sessionState mode="InProc" stateConnectionString="tcpip=127.0.0.1:42424"
sqlConnectionString="" cookieless="false" timeout="5" partitionResolverType="">
```

- Also, if you are running TARGIT NET and SharePoint on the same server, add the following lines to the <system.web> section of web.config located in the TARGIT NET directory and make sure the content of each tag below is left on its own line and doesn't contain linebreaks:

```
<trust level="Full" originUrl="" />
```



```
<httpModules>
  <add name="Session" type="System.Web.SessionState.SessionStateModule"/>
</httpModules>
<pages enableSessionState="true" enableViewState="true"
enableViewStateMac="true" validateRequest="false" />
```

Adding the Web Part to SharePoint

Before adding the Web Part to SharePoint you must make sure that SharePoint doesn't try to control the existing TARGIT NET web application. This is done by using managed paths:

- Click Start | All Programs | SharePoint Portal Server | SharePoint Central Administration.
- Login in as Administrator in SharePoint.
- In the "Portal Site and Virtual Server Configuration" section click "Configure virtual server settings from the Virtual Server List page".
- From the "Virtual Server List" page click the virtual server that you wish to add the excluded path to.
- Under the "Virtual Server Management" section, click "Define Managed Paths".
- In the "Add a New Path" section type TARGITNET in the Path box and select "Excluded Path" and click OK. Note that clicking the "Check URL" button in this dialog won't work.
- Close the administration tool by exiting Internet Explorer.

The TARGIT Web Part component is distributed in a .cab file. Administrator access to the server running SharePoint is required in order to deploy the cab file to the SharePoint installation. The following steps explain the deployment:

- First step is to create a directory called C:\TARGIT_INSTALL, download the TARGIT SharePoint WebPart file to the directory.
- Deploying the Web Part is done by using the Windows SharePoint Services Administration tool stsadm.exe. To deploy the Web Part open a command prompt and navigate to the (default) location: C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\BIN and enter the following line and click 'Enter':

```
stsadm -o addwppack -filename C:\TARGIT_INSTALL\TARGITWebPart.cab
```

- In some cases it may be necessary to add " -force" to the end of the command.
- The deployment may also fail with the error 'Version 2.0 is not a compatible version'. In this case go to the folder where stsadm.exe is placed (C:\Program Files\Common Files\Microsoft

Shared\web server extensions\60\BIN) and create a file named stsadm.exe.config and place the following in it:

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
<startup>
<supportedRuntime version="v2.0.50727" />
<!-- update the version # once .Net v2.0 is released -->
<supportedRuntime version="v1.1.4322" />
<!-- this is the version number for .Net v1.1 -->
</startup>
</configuration>
```

The Web Part will now deploy.

Like normal Web Parts the TARGIT SharePoint WebPart must be added to the page to run. The TARGIT SharePoint WebPart is added to the page in edit mode as any normal Web Part and afterwards configured through the normal configuration page of the Web Part. The TARGIT NET Client running within the Web Part uses session variables to store data during its execution. This limits the user to run only a single instance of the TARGIT SharePoint WebPart per session. The Web Part is found in the "Virtual Server Gallery" and may be placed into an appropriate zone of the page. The properties for the Web Part are the same as for most Web Parts with the exception of TARGIT specific settings.

Integrating with SharePoint Services 2.0

The following sections explain how to prepare the TARGIT environment for deployment of the TARGIT SharePoint WebPart and how to deploy the Web Part on SharePoint Services 2.0.

Configuring the TARGIT Environment

Note: Before integrating TARGIT with SharePoint make sure that the latest service pack is applied to SharePoint.

To setup TARGIT SharePoint WebPart it is required that you have a server running with TARGIT, specifically TARGIT Server, and that TARGIT is configured to use Windows Security. Next step is to install TARGIT NET. When installing TARGIT NET, make sure that it is installed as a new web site in the Internet Information Services (IIS). In IIS also make sure that ports used for SharePoint and TARGIT NET are not the same.

After installation the following changes must be done to the web.config file:

- First of all you have to tell TARGIT NET that it is integrated with SharePoint. This is done by setting the SharepointMode Key value to "1". This value is found in the TARGIT NET web.config file and looks like this:

```
<add key="SharepointMode" value="1"/>
```

- Furthermore, if you are running TARGIT NET and SharePoint on the same server partitionResolverType="" must be added to the following line in the web.config file:

```
<sessionState mode="InProc" stateConnectionString="tcpip=127.0.0.1:42424"
sqlConnectionString="" cookieless="false" timeout="5" partitionResolverType="">
```

- Also, if you are running TARGIT NET and SharePoint on the same server, add the following lines to the <system.web> section of web.config located in the TARGIT NET directory and make sure the content of each tag below is left on its own line and doesn't contain linebreaks:

```
<trust level="Full" originUrl="" />
<httpModules>
  <add name="Session" type="System.Web.SessionState.SessionStateModule"/>
</httpModules>
<pages enableSessionState="true" enableViewState="true"
enableViewStateMac="true" validateRequest="false" />
```

Adding the Web Part to SharePoint

The TARGIT Web Part component is distributed in a .cab file. Administrator access to the server running SharePoint is required in order to deploy the cab file to the SharePoint installation. The following steps explain the deployment:

- First step is to create a directory called C:TARGIT_INSTALL, download the TARGIT SharePoint WebPart file to the directory.
- Deploying the Web Part is done by using the Windows SharePoint Services Administration tool stsadm.exe. To deploy the Web Part open a command prompt and navigate to the (default) location: C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\BIN and enter the following line and click 'Enter':

```
stsadm -o addwppack -filename C:\TARGIT_INSTALL\TARGITWebPart.cab
```

- In some cases it may be necessary to add " -force" to the end of the command.
- The deployment may also fail with the error 'Version 2.0 is not a compatible version'. In this case go to the folder where stsadm.exe is placed (C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\BIN) and create a file named stsadm.exe.config and place the following in it:

```
<?xml version="1.0" encoding="utf-8" ?>
```

```
<configuration>
<startup>
<supportedRuntime version="v2.0.50727" />
<!-- update the version # once .Net v2.0 is released -->
<supportedRuntime version="v1.1.4322" />
<!-- this is the version number for .Net v1.1 -->
</startup>
</configuration>
```

The Web Part will now deploy.

Like normal Web Parts the TARGIT SharePoint WebPart must be added to the page to run. The TARGIT SharePoint WebPart is added to the page in edit mode as any normal Web Part and afterwards configured through the normal configuration page of the Web Part. The TARGIT NET Client running within the Web Part uses session variables to store data during its execution. This limits the user to run only a single instance of the TARGIT SharePoint WebPart per session. The Web Part is found in the "Virtual Server Gallery" and may be placed into an appropriate zone of the page. The properties for the Web Part are the same as for most Web Parts with the exception of TARGIT specific settings.

SharePoint 2007 Family

Integrating with SharePoint Server 2007

The following sections explain how to prepare the TARGIT environment for deployment of the TARGIT SharePoint WebPart and how to deploy the Web Part on SharePoint Server 2007.

Configuring the TARGIT Environment

Note: Before integrating TARGIT with SharePoint make sure that the latest service pack is applied to SharePoint.

To setup TARGIT SharePoint WebPart it is required that you have a server running with TARGIT, specifically TARGIT Server, and that TARGIT is configured to use Windows Security. Next step is to install TARGIT NET. When installing TARGIT NET, make sure that it is installed as a virtual directory under the Default website in the Internet Information Services (IIS). In IIS also make sure that ports used for SharePoint and TARGIT NET are not the same.

After installation the following changes must be done to the web.config file:

- First of all you have to tell TARGIT NET that it is integrated with SharePoint. This is done by setting the SharepointMode Key value to "1". This value is found in the TARGIT NET web.config file and looks like this:

```
<add key="SharepointMode" value="1"/>
```

- Furthermore, if you are running TARGIT NET and SharePoint on the same server `partitionResolverType=""` must be added to the following line in the web.config file:

```
<sessionState mode="InProc" stateConnectionString="tcpip=127.0.0.1:42424"
sqlConnectionString="" cookieless="false" timeout="5" partitionResolverType="">
```

- Also, if you are running TARGIT NET and SharePoint on the same server, add the following lines to the `<system.web>` section of web.config located in the TARGIT NET directory and make sure the content of each tag below is left on its own line and doesn't contain linebreaks:

```
<!-- Sharepoint 2007 Section Begin -->
<httpHandlers>
<add verb="*" path="*.aspx" type="System.Web.UI.PageHandlerFactory" />
<add path="WebResource.axd" verb="GET"
type="System.Web.Handlers.AssemblyResourceLoader" validate="True" />
</httpHandlers>
<!-- Set the trust to Full. -->
<trust level="Full" originUrl="" />
<!-- Enable the session module. -->
<httpModules>
<remove name="PublishingHttpModule" />
<add name="Session" type="System.Web.SessionState.SessionStateModule"/>
</httpModules>
<!-- Enable session state for all the pages in the Web application. -->
<pages autoEventWireup="true" enableSessionState="true" enableViewState="true"
enableViewStateMac="true"
smartNavigation="false" validateRequest="false" />
<!-- Sharepoint 2007 Section End -->
```

- **Note:** Some changes apply depending on the system environment:
 - If you are running IIS 7.0 the httpModules section causes an error (HTTP error 500.19). In this case delete the section and change the application pool of TARGIT to run in classic mode in the IIS Manager.
 - If running Windows Server 2008 also make sure that the system.webServer section in the web.config of TARGIT NET is deleted.
 - If the error "Access denied" is shown in the web part when running IIS 7.0, make sure that Windows authentication is enabled for the virtual directory of TARGIT NET.

Adding the Web Part to SharePoint

The TARGIT Web Part component is distributed in a .cab file. Administrator access to the server running SharePoint is required in order to deploy the cab file to the SharePoint installation. The following steps explain the deployment:

- First step is to create a directory called C:\TARGIT_INSTALL. Download the TARGIT SharePoint WebPart file to the directory.
- Deploying the Web Part is done by using the Windows SharePoint Services Administration tool stsadm.exe. To deploy the Web Part open a command prompt and navigate to the (default) location: C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN and enter the following line and click 'Enter':

```
stsadm -o addwppack -filename C:\TARGIT_INSTALL\TARGITWebPart.cab
```

- In some cases it may be necessary to add " -force" to the end of the command.

Like normal Web Parts the TARGIT SharePoint WebPart must be added to the page to run. The TARGIT SharePoint WebPart is added to the page in edit mode as any normal Web Part and afterwards configured through the normal configuration page of the Web Part. The TARGIT NET Client running within the Web Part uses session variables to store data during its execution. This limits the user to run only a single instance of the TARGIT SharePoint WebPart per session. The Web Part is found among the "Miscellaneous" web parts in the section "All Web Parts" and may be placed into an appropriate zone of the page. The properties for the Web Part are the same as for most Web Parts with the exception of TARGIT specific settings.

Integrating with SharePoint Services 3.0

The following sections explain how to prepare the TARGIT environment for deployment of the TARGIT SharePoint WebPart and how to deploy the Web Part on SharePoint Services 3.0

Configuring the TARGIT Environment

Note: Before integrating TARGIT with SharePoint make sure that the latest service pack is applied to SharePoint.

To setup TARGIT SharePoint WebPart it is required that you have a server running with TARGIT, specifically TARGIT Server, and that TARGIT is configured to use Windows Security. Next step is to install TARGIT NET. When installing TARGIT NET, make sure that it is installed as a virtual directory under the Default website in the Internet Information Services (IIS). In IIS also make sure that ports used for SharePoint and TARGIT NET are not the same.

After installation the following changes must be done to the web.config file:

- First of all you have to tell TARGIT NET that it is integrated with SharePoint. This is done by setting the SharepointMode Key value to "1". This value is found in the TARGIT NET web.config file and looks like this:

```
<add key="SharepointMode" value="1"/>
```

- Furthermore, if you are running TARGIT NET and SharePoint on the same server partitionResolverType="" must be added to the following line in the web.config file:

```
<sessionState mode="InProc" stateConnectionString="tcpip=127.0.0.1:42424"
sqlConnectionString="" cookieless="false" timeout="5" partitionResolverType="">
```

- Also, if you are running TARGIT NET and SharePoint on the same server, add the following lines to the <system.web> section of web.config located in the TARGIT NET directory and make sure the content of each tag below is left on its own line and doesn't contain linebreaks:

```
<!-- Sharepoint services 3.0 Section Begin -->
<httpHandlers>
<add verb="*" path="*.aspx" type="System.Web.UI.PageHandlerFactory" />
<add path="WebResource.axd" verb="GET"
type="System.Web.Handlers.AssemblyResourceLoader" validate="True" />
</httpHandlers>
<!-- Set the trust to Full. -->
<trust level="Full" originUrl="" />
<!-- Enable the session module. -->
<httpModules>
<add name="Session" type="System.Web.SessionState.SessionStateModule"/>
</httpModules>
<!-- Enable session state for all the pages in the Web application. -->
<pages autoEventWireup="true" enableSessionState="true" enableViewState="true"
enableViewStateMac="true" smartNavigation="false" validateRequest="false" />
<!-- Sharepoint services 3.0 Section End -->
```

Note: SharePoint Services 3.0 is not compatible with Windows Server 2008.

Adding the Web Part to SharePoint

The TARGIT Web Part component is distributed in a .cab file. Administrator access to the server running SharePoint is required in order to deploy the cab file to the SharePoint installation. The following steps explains the deployment:

- First step is to create a directory called C:\TARGIT_INSTALL. Download the TARGIT SharePoint WebPart file to the directory.

- Deploying the Web Part is done by using the Windows SharePoint Services Administration tool stsadm.exe. To deploy the Web Part open a command prompt and navigate to the (default) location: C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN and enter the following line and click 'Enter':

```
stsadm -o addwppack -filename C:\TARGIT_INSTALL\TARGITWebPart.cab
```

- In some cases it may be necessary to add " -force" to the end of the command.

Like normal Web Parts the TARGIT SharePoint WebPart must be added to the page to run. The TARGIT SharePoint WebPart is added to the page in edit mode as any normal Web Part and afterwards configured through the normal configuration page of the Web Part. The TARGIT NET Client running within the Web Part uses session variables to store data during its execution. This limits the user to run only a single instance of the TARGIT SharePoint WebPart per session. The Web Part is found among the "Miscellaneous" web parts in the section "All Web Parts" and may be placed into an appropriate zone of the page. The properties for the Web Part are the same as for most Web Parts with the exception of TARGIT specific settings.

SharePoint 2010 Family

Integrating with SharePoint Server 2010

The following sections explain how to prepare the TARGIT environment for deployment of the TARGIT SharePoint WebPart and how to deploy the Web Part on SharePoint Server 2010.

Configuring the TARGIT Environment

Note: Before integrating TARGIT with SharePoint make sure that the latest service pack is applied to SharePoint.

To setup TARGIT SharePoint WebPart it is required that you have a server running with TARGIT, specifically TARGIT Server, and that TARGIT is configured to use Windows Security. Next step is to install TARGIT NET. When installing TARGIT NET, make sure that it is installed as a virtual directory under the Default website in the Internet Information Services (IIS). In IIS also make sure that ports used for SharePoint and TARGIT NET are not the same.

After installation the following changes must be done to the web.config file:

- First of all you have to tell TARGIT NET that it is integrated with SharePoint. This is done by setting the SharepointMode Key value to "1". This value is found in the TARGIT NET web.config file and looks like this:

```
<add key="SharepointMode" value="1"/>
```


- Furthermore, if you are running TARGIT NET and SharePoint on the same server `partitionResolverType=""` must be added to the following line in the web.config file:

```
<sessionState mode="InProc" stateConnectionString="tcpip=127.0.0.1:42424"
sqlConnectionString="" cookieless="false" timeout="5" partitionResolverType="">
```

- Also, if you are running TARGIT NET and SharePoint on the same server, add the following lines to the `<system.web>` section of web.config located in the TARGIT NET directory and make sure the content of each tag below is left on its own line and doesn't contain linebreaks:

```
<!-- Sharepoint 2010 Section Begin -->
<httpHandlers>
<add verb="*" path="*.aspx" type="System.Web.UI.PageHandlerFactory" />
<add path="WebResource.axd" verb="GET"
type="System.Web.Handlers.AssemblyResourceLoader" validate="True" />
</httpHandlers>
<!-- Set the trust to Full. -->
<trust level="Full" originUrl="" />
<!-- Enable the session module. -->
<httpModules>
<remove name="PublishingHttpModule" />
<add name="Session" type="System.Web.SessionState.SessionStateModule"/>
</httpModules>
<!-- Enable session state for all the pages in the Web application. -->
<pages autoEventWireup="true" enableSessionState="true" enableViewState="true"
enableViewStateMac="true"
smartNavigation="false" validateRequest="false" />
<!-- Sharepoint 2010 Section End -->
```

- Also make sure that the `system.webServer` section in the web.config of TARGIT NET is deleted.
- **Note:** Some changes apply depending on the system environment:
 - If you are running IIS 7.0, the `httpModules` section causes an error (HTTP error 500.19). In this case delete the section and change the application pool of TARGIT to run in classic mode in the IIS Manager.
 - If the error "Access denied" is shown in the web part when running IIS 7.0, make sure that Windows authentication is enabled for the virtual directory of TARGIT NET.

Adding the Web Part to SharePoint

The TARGIT Web Part component is distributed in a .cab file. Administrator access to the server running SharePoint is required in order to deploy the cab file to the SharePoint installation. The following steps explain the deployment:

- First step is to create a directory called C:\TARGIT_INSTALL. Download the TARGIT SharePoint WebPart file to the directory.
- Deploying the Web Part is done by using the Windows SharePoint Services Administration tool stsadm.exe. To deploy the Web Part open a command prompt and navigate to the (default) location: C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\BIN and enter the following line and click 'Enter':

```
stsadm -o addwppack -filename C:\TARGIT_INSTALL\TARGITWebPart.cab
```

- In some cases it may be necessary to add " -force" to the end of the command.

Like normal Web Parts the TARGIT SharePoint WebPart must be added to the page to run. The TARGIT SharePoint WebPart is added to the page in edit mode as any normal Web Part and afterwards configured through the normal configuration page of the Web Part. The TARGIT NET Client running within the Web Part uses session variables to store data during its execution. This limits the user to run only a single instance of the TARGIT SharePoint WebPart per session. The Web Part is found in the category "Miscellaneous" and may be placed in an appropriate zone of the page. The properties for the Web Part are the same as for most Web Parts with the exception of TARGIT specific settings.

Integrating with SharePoint Foundation 2010

The following sections explain how to prepare the TARGIT environment for deployment of the TARGIT SharePoint WebPart and how to deploy the Web Part on SharePoint Foundation 2010.

Configuring the TARGIT Environment

Note: Before integrating TARGIT with SharePoint make sure that the latest service pack is applied to SharePoint.

To setup TARGIT SharePoint WebPart it is required that you have a server running with TARGIT, specifically TARGIT Server, and that TARGIT is configured to use Windows Security. Next step is to install TARGIT NET. When installing TARGIT NET, make sure that it is installed as a virtual directory under the Default website in the Internet Information Services (IIS). In IIS also make sure that ports used for SharePoint and TARGIT NET are not the same.

After installation the following changes must be done to the web.config file:

- First of all you have to tell TARGIT NET that it is integrated with SharePoint. This is done by setting the SharepointMode Key value to "1". This value is found in the TARGIT NET web.config file and looks like this:

```
<add key="SharepointMode" value="1"/>
```

- Furthermore, if you are running TARGIT NET and SharePoint on the same server partitionResolverType="" must be added to the following line in the web.config file:

```
<sessionState mode="InProc" stateConnectionString="tcpip=127.0.0.1:42424"
sqlConnectionString="" cookieless="false" timeout="5" partitionResolverType="">
```

- Also, if you are running TARGIT NET and SharePoint on the same server, add the following lines to the <system.web> section of web.config located in the TARGIT NET directory and make sure the content of each tag below is left on its own line and doesn't contain linebreaks:

```
<!-- Sharepoint 2010 Section Begin -->
<httpHandlers>
<add verb="*" path="*.aspx" type="System.Web.UI.PageHandlerFactory" />
<add path="WebResource.axd" verb="GET"
type="System.Web.Handlers.AssemblyResourceLoader" validate="True" />
</httpHandlers>
<!-- Set the trust to Full. -->
<trust level="Full" originUrl="" />
<!-- Enable the session module. -->
<httpModules>
<remove name="PublishingHttpModule" />
<add name="Session" type="System.Web.SessionState.SessionStateModule"/>
</httpModules>
<!-- Enable session state for all the pages in the Web application. -->
<pages autoEventWireup="true" enableSessionState="true" enableViewState="true"
enableViewStateMac="true"
smartNavigation="false" validateRequest="false" />
<!-- Sharepoint 2010 Section End -->
```

- Also make sure that the system.webServer section in the web.config of TARGIT NET is deleted.
- **Note:** Some changes apply depending on the system environment:
 - If you are running IIS 7.0, the httpModules section causes an error (HTTP error 500.19). In this case delete the section and change the application pool of TARGIT to run in classic mode in the IIS Manager.

- If the error "Access denied" is shown in the web part when running IIS 7.0, make sure that Windows authentication is enabled for the virtual directory of TARGIT NET.

Adding the Web Part to SharePoint

The TARGIT Web Part component is distributed in a .cab file. Administrator access to the server running SharePoint is required in order to deploy the cab file to the SharePoint installation. The following steps explain the deployment:

- First step is to create a directory called C:\TARGIT_INSTALL. Download the TARGIT SharePoint WebPart file to the directory.
- Deploying the Web Part is done by using the Windows SharePoint Services Administration tool stsadm.exe. To deploy the Web Part open a command prompt and navigate to the (default) location: C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\BIN and enter the following line and click 'Enter':

```
stsadm -o addwppack -filename C:\TARGIT_INSTALL\TARGITWebPart.cab
```

- In some cases it may be necessary to add " -force" to the end of the command.

Like normal Web Parts the TARGIT SharePoint WebPart must be added to the page to run. The TARGIT SharePoint WebPart is added to the page in edit mode as any normal Web Part and afterwards configured through the normal configuration page of the Web Part. The TARGIT NET Client running within the Web Part uses session variables to store data during its execution. This limits the user to run only a single instance of the TARGIT SharePoint WebPart per session. The Web Part is found in the category "Miscellaneous" and may be placed in an appropriate zone of the page. The properties for the Web Part are the same as for most Web Parts with the exception of TARGIT specific settings.

Configuring the TARGIT Web Part in SharePoint

When the Web Part has been added to the SharePoint solution it may be configured. Below the TARGIT specific settings are explained:

URL

Enter the URL that points to the server running SharePoint and has TARGIT NET installed. By default the URL for TARGIT NET should be: `http://server_name/TARGITNET`. Do not use "localhost" as servername. SharePoint will, due to its session handling, launch several TARGIT NET clients. This will result in a "All licenses used" error message.

Favorites file

Filename of an analysis or report that will load when the page is displaying the Web Part, e.g. vfs://Global/Sales/Sample revenue.xview.

Toolbar

Controls whether the toolbar TARGIT NET is visible or not.

Smartpad

Controls whether the Smartpad TARGIT NET is visible or not.

Upgrading to newer TARGIT builds

Upgrading the TARGIT SharePoint WebPart should be done like installing the Web Part using the stsadm tool:

```
stsadm -o addwppack -filename C:\TARGIT_INSTALL\TARGITWebPart.cab
```

Note: It is important not to use the deletewppack command of the stsadm tool. Using that option will remove the unique id that's assigned automatically for the TARGIT SharePoint WebPart from the SharePoint database and thereby requiring that the Web Part is added manually to every page again. If an upgrade is performed from a version prior to build 4665, the above upgrade procedure will not work. Instead delete the existing web part with the following command:

```
stsadm -o deletewppack -name TARGITWebPart.cab
```

After deleting the existing web part install the new web part and add it to the SharePoint page(s) again as explained in the sections for each SharePoint version.

Connections from other Web Parts

It is possible to create other Web Parts that connects to the TARGIT SharePoint WebPart. Currently it is possible to provide the location in the ANTserver VFS of an analysis or a report and make the TARGIT SharePoint WebPart open that analysis using a VFS Name-cell connection.

Appendix

Installation Contents

This overview will serve to explain what files have been installed where and for what purpose. It should be emphasized that this overview is not meant as a recommendation for manual moving / copying / modification of the folders and files. TARGIT Management Studio is the primary interface for such actions. The following paths are the default installation paths.

C:\Program Files\Common Files\TARGIT

This folder contains the system ocx file, dll files that are common for all TARGIT components and a Help folder with all the help files for the Windows client.

C:\Program Files\TARGIT\Analysis

This folder only contains a single file - the executable file for the Windows client.

C:\Program Files\TARGIT\ANTServer

This folder contains files and subfolders related to the TARGIT Server.

Subfolder 'Exported Reports'

This folder is the default output folder for exports.

Subfolder 'Mapdata'

This folder is intended for the Scalable Maps functionality in TARGIT. You may add any new GIS Workspaces to this folder in order to access the information from TARGIT. The demo installation of the TARGIT comes with one World GIS workspace already installed, located in the \World subfolder.

Subfolder 'Settings'

This folder contains many subfolders with various settings related to the general behavior of TARGIT. Most of the information is in the editable XML format, but it is recommended to use TARGIT Management Studio when changes are needed. The folder also contains the Settings.xml file which contains all of the settings that may be set in TARGIT Management Studio.

Subfolder 'Settings\Charts'

This folder holds files with dimension value coordinates for gauges, globes and maps.

Subfolder 'Settings\Colors'

All the files in this folder contain color coding information on e.g. graphs and charts.

Subfolder 'Settings\Comparisons'

This folder contains an XML files with information on all stored comparisons.

Subfolder 'Settings\Connections'

The subfolders in this folder correspond to the connections that have been defined in TARGIT Management Studio. Each subfolder contains information about one connection. Connections.xml contains more general information about.

Subfolder 'Settings\Criteria'

This folder contains an XML files with information on all stored criteria.

Subfolder 'Settings\Decorations'

This folder contains Decorations.xml with information about the decorations added from TARGIT Management Studio.

Subfolder 'Settings\Defaults'

This folder contains the UserPreferences.xml file with default settings for new users. See the section "Configure User Preferences" for details. The folder also contains the Favorites.xml file with a list of the default documents that are added to new users' Favorites section.

Subfolder 'Settings\DesktopData'

Data in Desktop clients is automatically updated each time the underlying data warehouses have been processed. The State.xml file keeps track of the last processing.

Subfolder 'Settings\Jobs'

This folder is related to all scheduled jobs that all users may have created for this TARGIT installation and contains information about jobs, schedules and logging information related to the schedules.

Subfolder 'Settings\Logins'

When a user logs on to the ANTserver, some information regarding their client version, access rights and time is logged in the Logins.xml file in this folder.

Subfolder 'Settings\Roles'

The file Roles.xml file contains information about all created Roles in the current authentication/security model.

Subfolder 'Settings\Search'

This folder contains an SQL database with indexing information on the search function in the Smartpad Documents tab.

Subfolder 'Settings\Translations'

The MetaData.xml file in this folder contains all the translations and descriptions that may be added to source data via the translation editor in TARGIT Management Studio. Languages.xml contains id-mapping of all the languages in TARGIT.

Subfolder 'Settings\Upgrade'

This folder contains a text file with information about any prior upgrades that required conversion.

Subfolder 'Settings\Users'

This folder holds information about users and potential groups of users as they may have been defined from the TARGIT Management Studio when working with Standard Security.

Subfolder 'VFS\ChartImgs'

This folder may contain image files of the type bmp, jpg or gif. The chart images in this folder are available in the TARGIT clients as background images for individual objects.

Subfolder 'VFS\Gauges'

This folder contains compressed cab files. Each cab file corresponds to one type of gauge when working with the standard gauges in the TARGIT client. When creating a new custom gauge, using the Gauge Builder Wizard in the TARGIT client, the gauge will be saved in a new cab file.

Subfolder 'VFS\Global'

The Global folder contains all the analyses, reports, dashboards and storyboards that are saved in the Shared Favorites folder in the TARGIT client. The Global folder may be structured with subfolders to give a similar structure in the Shared Favorites folder in the TARGIT client.

Subfolder 'VFS\MapImgs'

This folder may contain image files of the type bmp, jpg or gif. The map images in this folder are available in the TARGIT clients for map objects. If a map is linked to the Globe then the MapGlobeSections.cfg file will store information about this link.

Subfolder 'VFS\Personal'

The Personal folder holds a subfolder structure – one subfolder for each user. When an end-user saves an analysis, report, dashboard or storyboard in his/her Personal folder in the client, it will be physically stored on the TARGIT Server in this folder structure. When working with Windows Authentication the subfolders will furthermore be structured within domain folders. The file MySettings.cfg inside the Settings folder contains information about each user's personal TARGIT preferences and behavior. The administrator could create a company standardized user profile and copy this user's MySettings.cfg file to the personal folder of all other users. Note that the Settings folder also contains XML files with personal information; a Criteria folder with information on personal stored criteria, a Desktop folder with information on objects and notifications added to the user's Desktop, a Intelligence folder with information on the user's behavior used for the automatic intelligence, a Recent folder with information on the recently opened documents, Drillpad.xml

containing all Drillpad information, Export.xml with information on the user's export properties, OpenSave.xml with information on the user's open/save destinations, Preferences.xml with the user's user preferences and Favorites.xml with a list of the users Favorites. Each personal folder also contains a Favorites folder with the user's personal analyses and reports.

C:\Program Files\TARGIT\Management Studio

This folder contains the executable file for the TARGIT Management Studio and a folder containing help files for TARGIT Management Studio.

Glossary

Active Directory

Active Directory is a directory service used to store information about the network resources across a domain and also centralize the network. An 'Active Directory' structure is a hierarchical framework of objects. The objects fall into three broad categories: resources (e.g., printers), services (e.g., email), and users (user accounts and groups). The AD provides information on the objects, organizes the objects, controls access and sets security.

Business Intelligence

A computer based BI System is designed to generate information in a user-friendly way. This offers decision-makers with limited knowledge of computers the ability to specify their own analysis.

IIS (Internet Information Services)

This is a Microsoft web platform used for hosting web applications and services.

Network Load Balancing

Network Load Balancing is a technology used to balance network traffic across a number of hosts, helping to enhance scalability and availability of services.