

Planner Server Setup version 4

[Planner Server Setup old version](#)

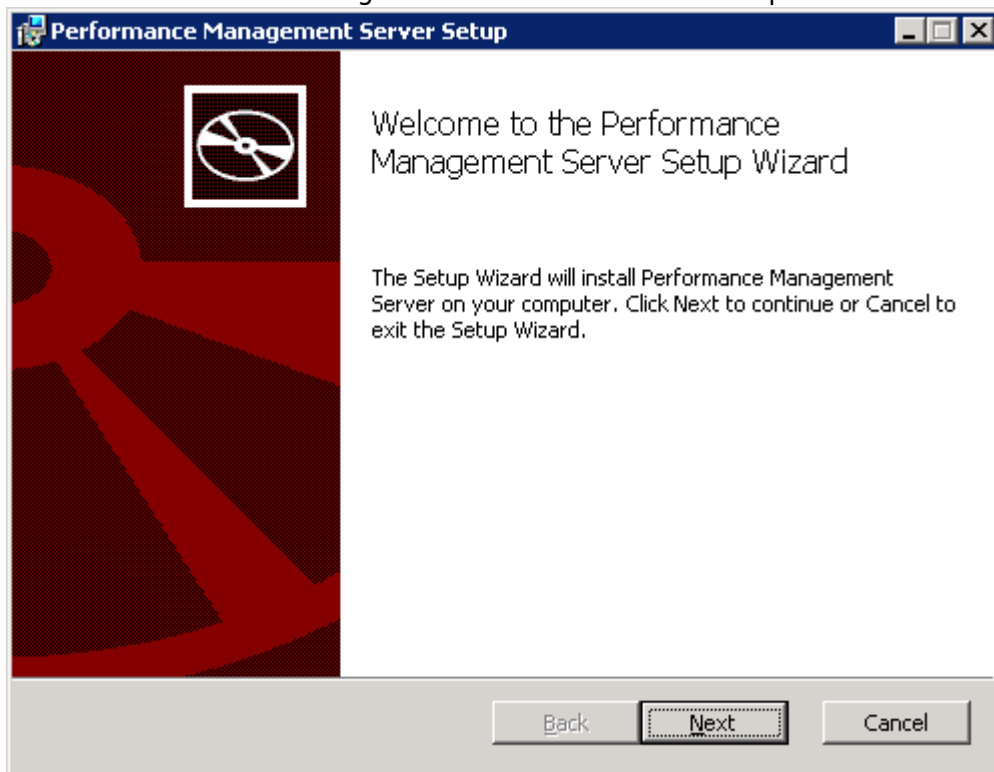
If it's a Single Server or a Demo server, here is the requirements

[Technical Prerequisites](#)

Install Server Components

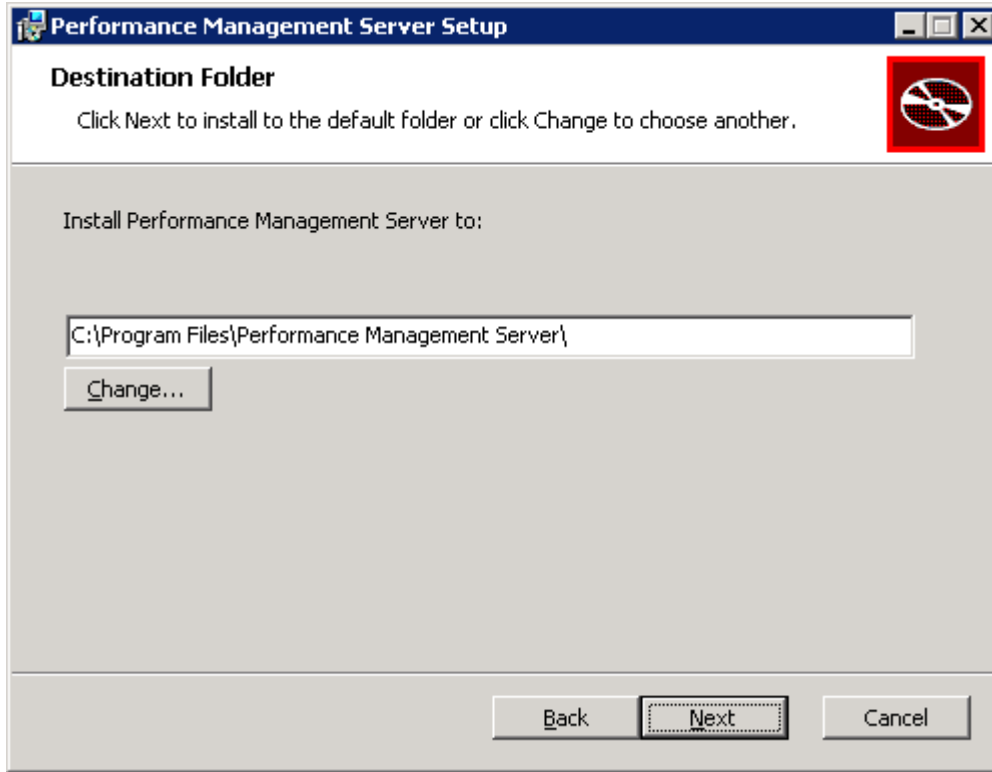
Step 1: Welcome

To start the install, double click on **Callisto64_xxx.msi** or **EPM64_xxxx.msi** -> click on **Next**.
Note: **xxxx** refers to a 4 digit number that identifies the specific build number of the install.

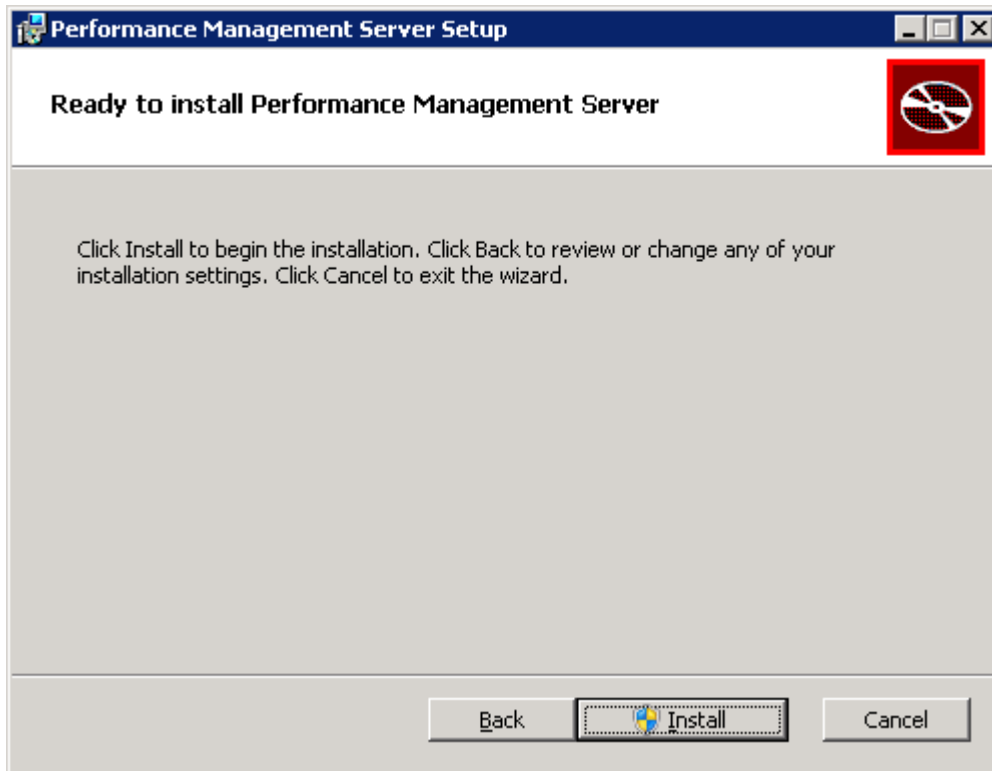


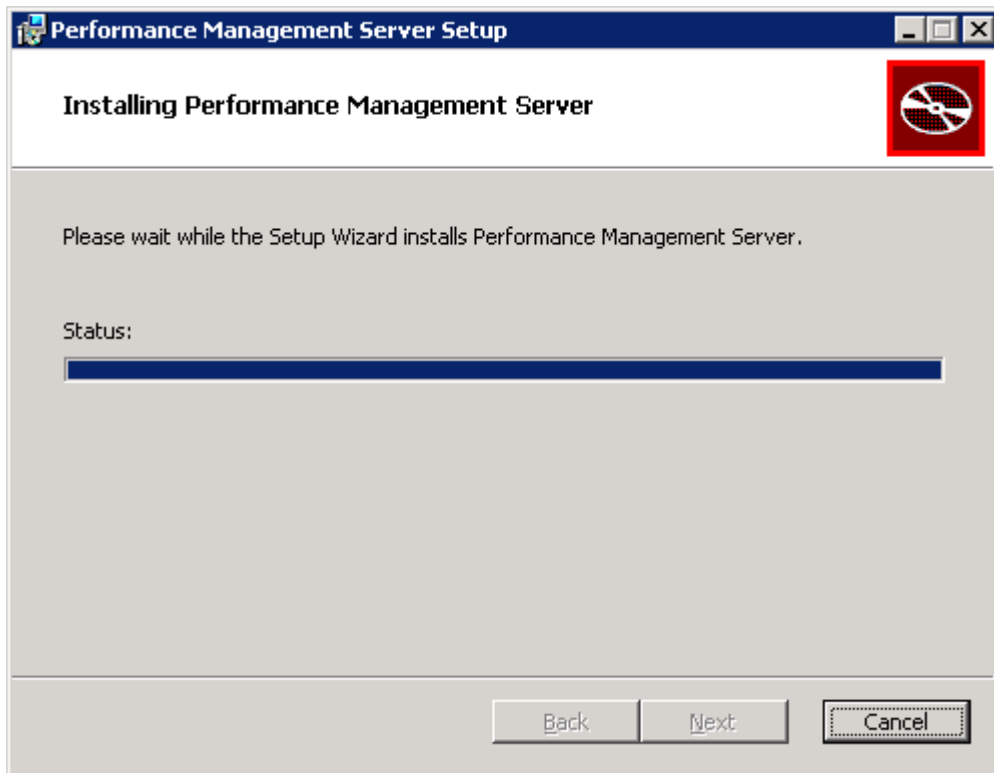
Step 2: Server Installation Folder

Accept or change the folder the server software will be installed into. Click on **Next** to continue.
We highly recommend to use the default installation path.



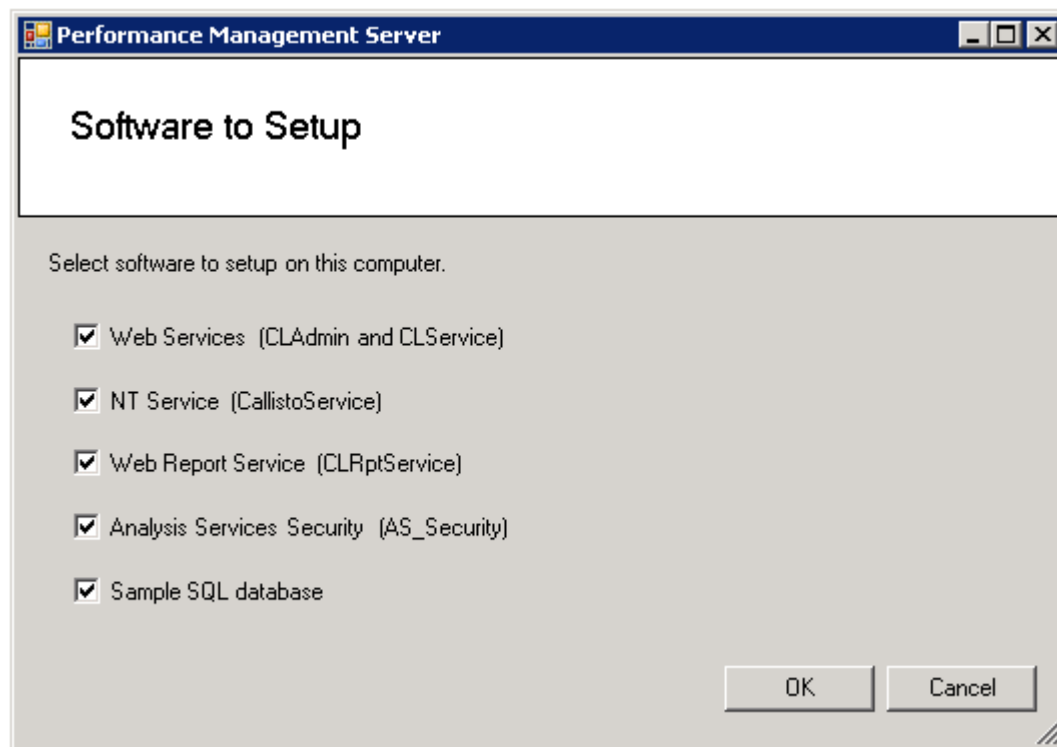
Click **Install** to continue.





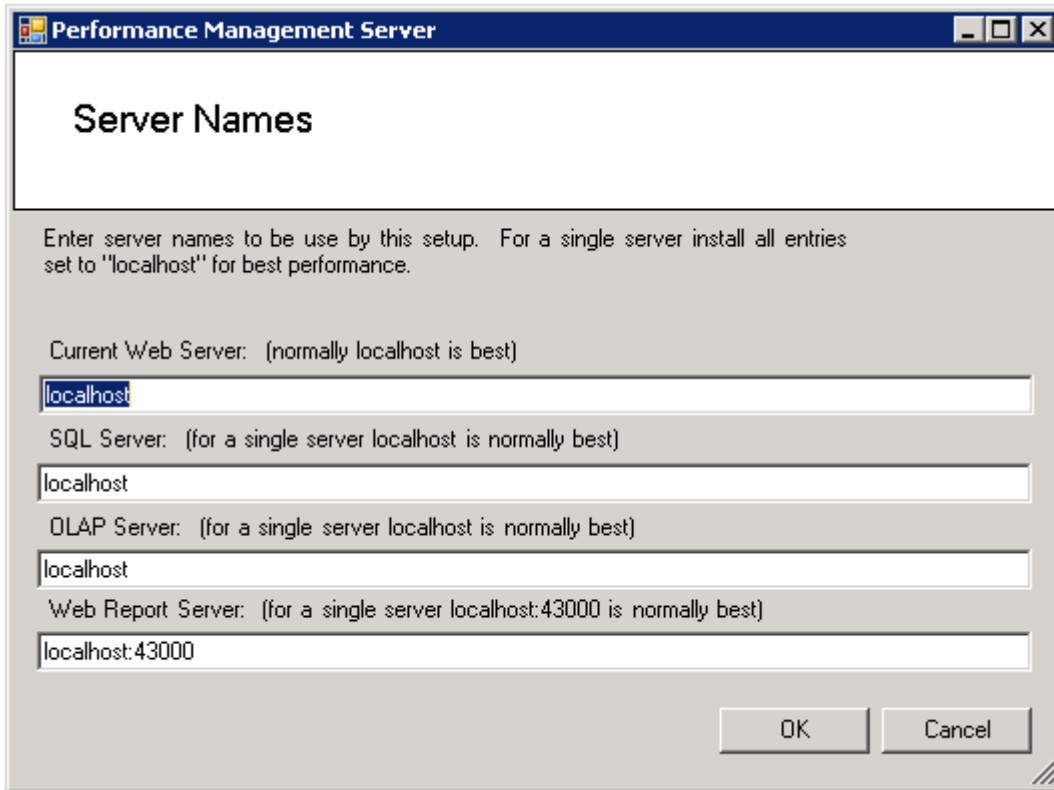
Step 3: Software to Install

Select the software components to install on this server. For a single server installation, such as a demo server, just accept the selection of all 4 software components and the Sample database. Click Next to continue.



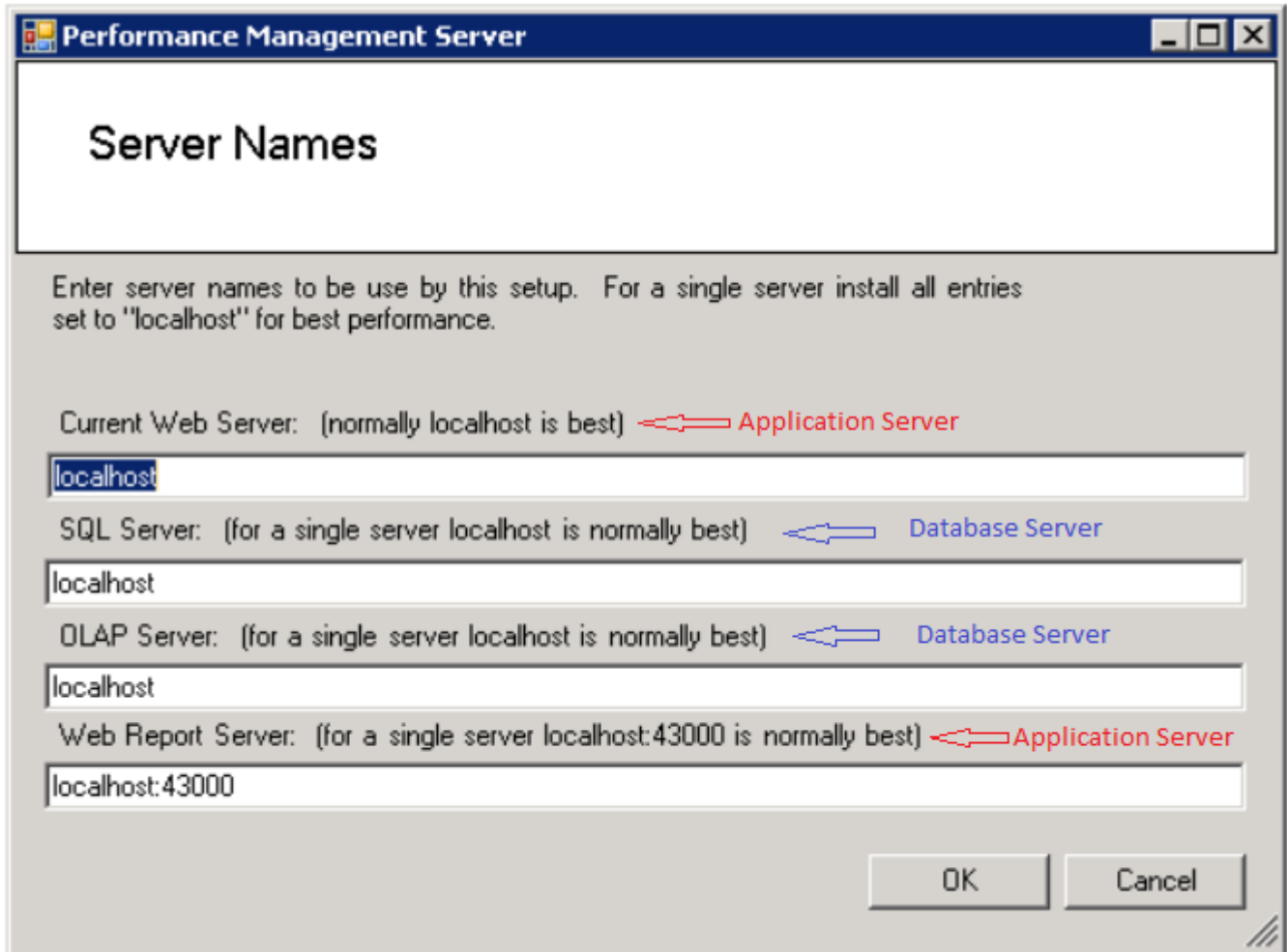
Step 4: Server Names_Single Server Installation

Enter the names of the servers to be used by your Server installation.
For a single server environment just accept localhost for all servers to get best performance.
Click Next to continue.



Step 4: Server Names_Multi-Server Installation

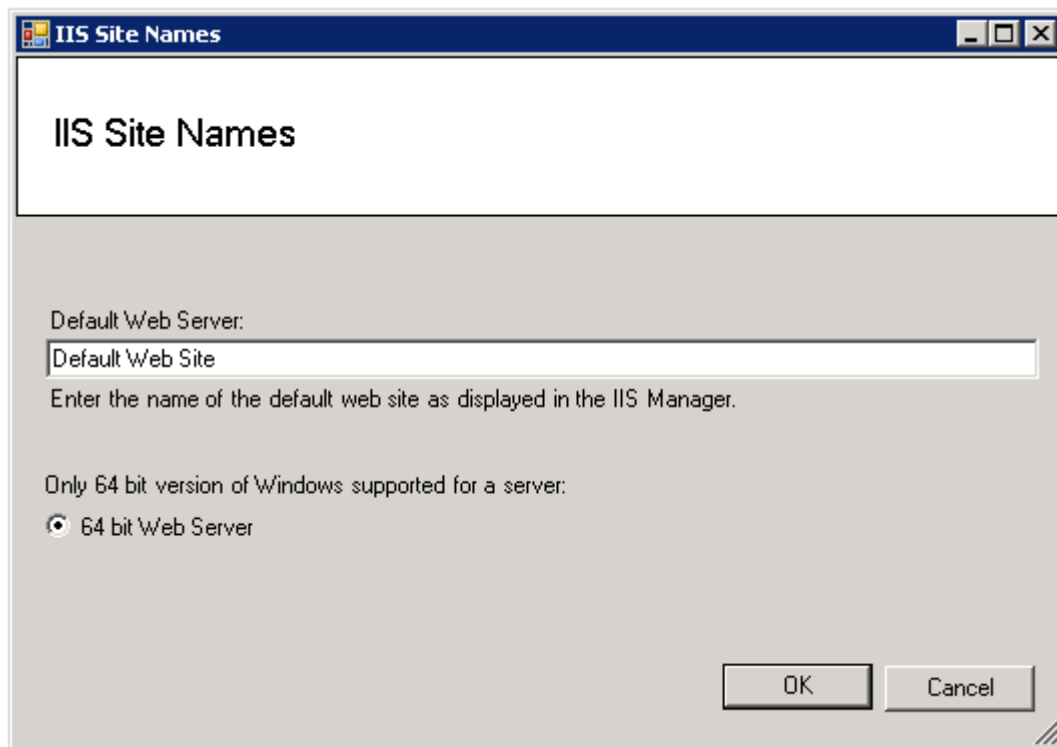
Multi-servers installation, at this step:



- Above screenshot, SSAS is installed at SQL Server end.
- OLAP Server should be **application server name** if SSAS is installed at application server.
- If SSAS server is installed at application server, please make sure all service accounts for SSAS(app server) / SQLServer / SQLServerAgent instances are domain accounts with enough/proper rights. So the two servers can communicate with each other for EFP to work.

Step 5: IIS Site Names

This dialog box only appears when you select the Web Service software component in step 3. Normally you do not need to change this entry. If the IIS Server on this machine has been reconfigured to use a different name for the default web site, enter the appropriate name here.



Step 6: Web Service User Credentials

This dialog box only appears when you select the Web Service software component in step 3.

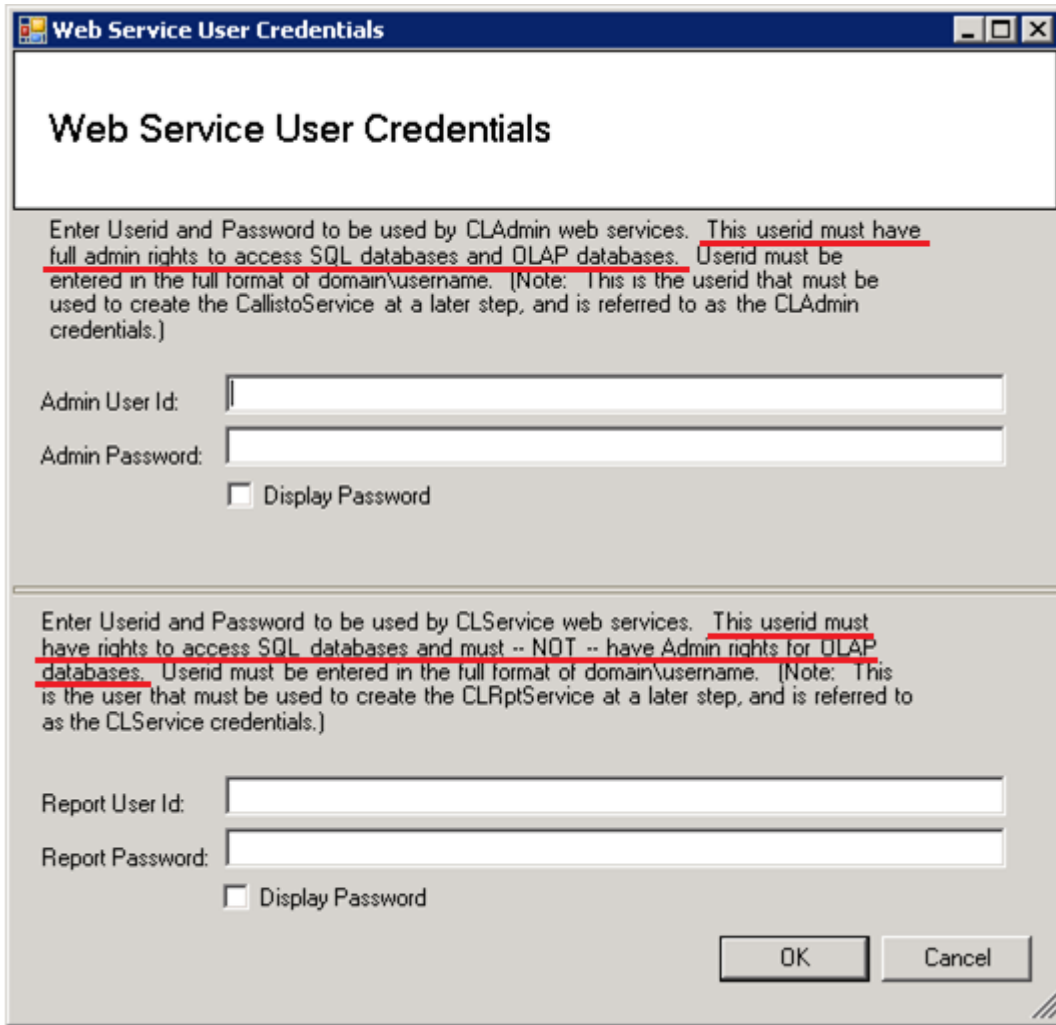
In the top section, enter the user id and password that the Admin Web Service will be configured to use for privileged access to SQL databases, and administrator access to SQL Server Analysis Services, which is **the User ONE** from [Pre-requisites NO.8](#).

In the lower section, enter the user id and password that the reporting Web Services will be configured to use for access to SQL databases, and NOT administrator access to SQL Server Analysis Services, which is **the User TWO** from [Pre-requisites NO.8](#).

(Note: If this User Id has administrator access to SQL Server Analysis Services there will be NO security in mobile and browser reporting and all users will be able to see all data.)

User Id must be entered in the full format of domain\username.

Click OK to continue.

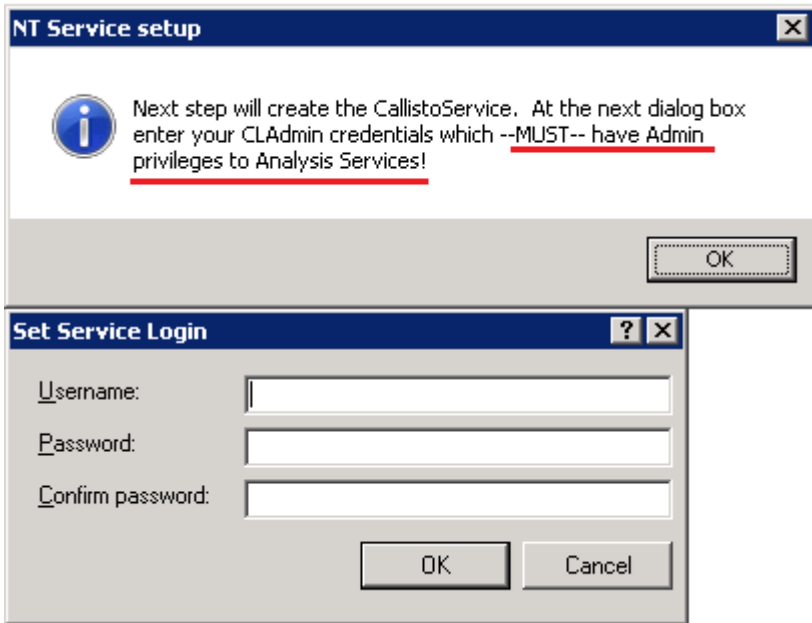


Step 7: Set Service Login

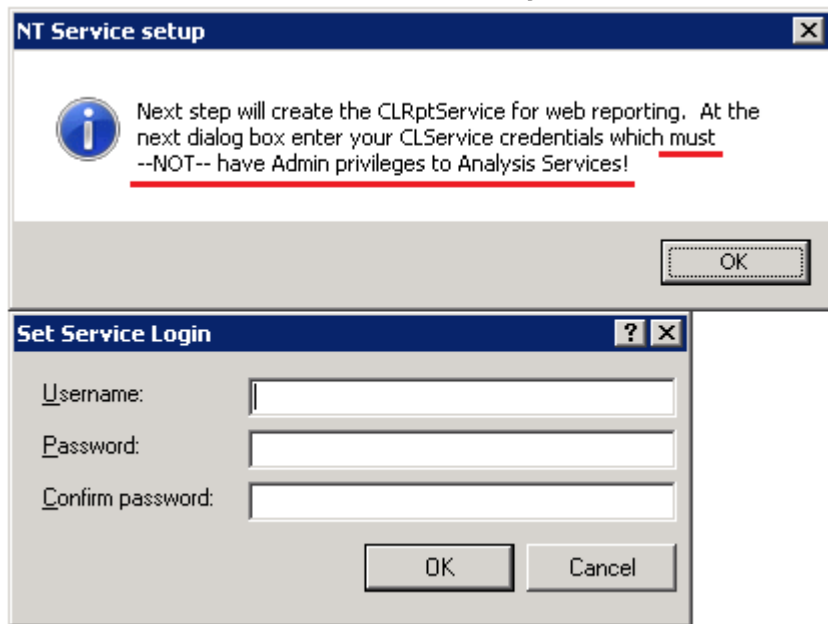
These dialog boxes only appear if you select the NT Service and Web Report Services software components in step 3. **Username must be entered in the full format of domain\username..**

First prompt is for the NT Service setup. **(Here should be the User ONE.)**

Enter the user id and password the CallistoService will be configured to use for access to SQL Server and SQL Server Analysis Services. After the installation is completed, these credentials can be changed by changing the Log On properties for the Service named "CallistoService". Click OK to continue.



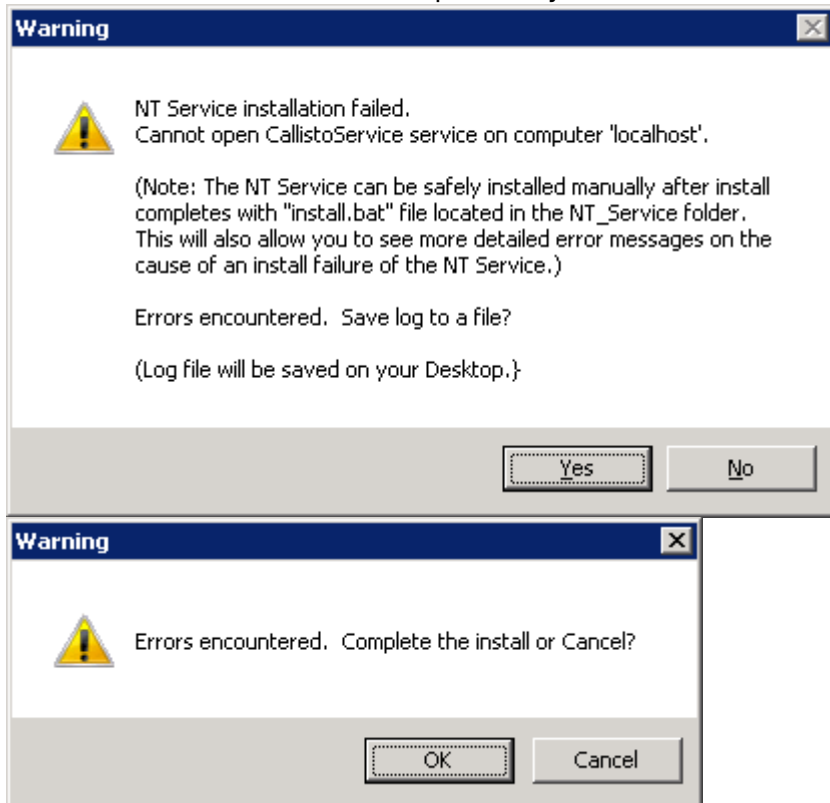
Second prompt is for the Web Report Services setup. **(Here should be the User TWO.)** Enter the user id and password the CLRptService will be configured to use for access to SQL Server and SQL Server Analysis Services. After the installation is completed, these credential can be changed by changing the Log On properties for the Service named "CLRptService". **(Note: This user id should not be configured as an Administrator in SQL Server Analysis Services, and it should not be a user id that is used in any Performance Management Security Roles! Otherwise, security will not work correctly in mobile and browser reporting and users will be able see data they should not have access to.)** Click OK to continue.



Step 8: Warning messages

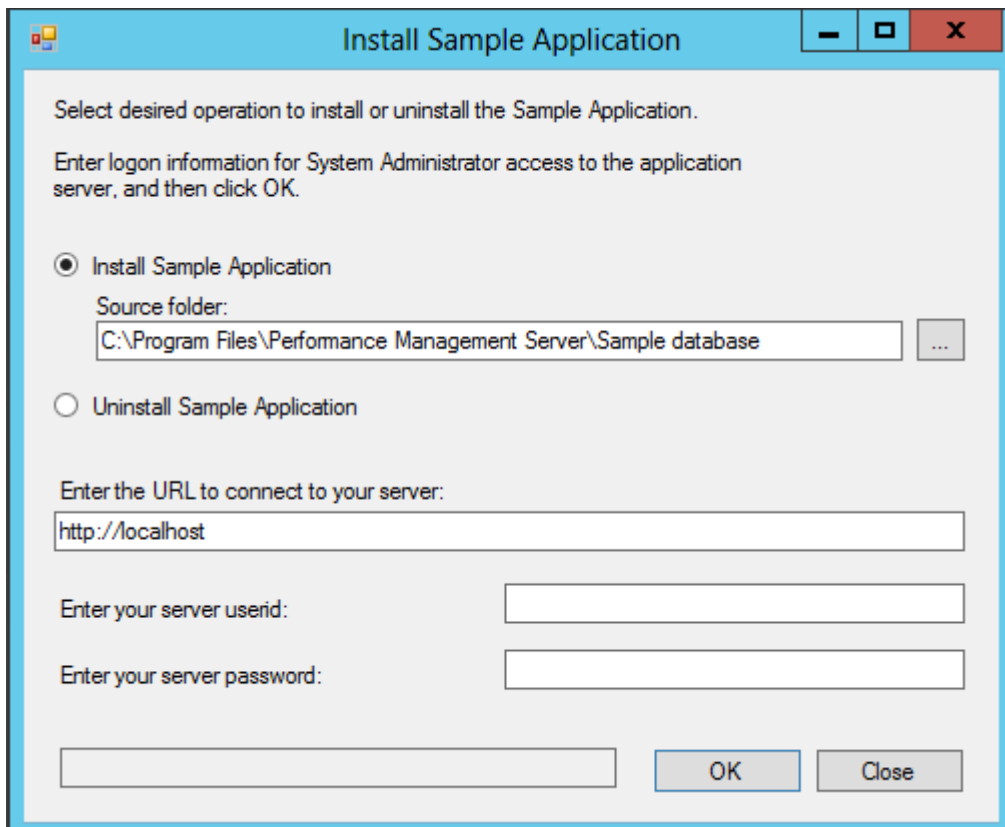
If everything installs with no problems, this dialog box will not appear. If any errors occur during the install a warning dialog box similar to the following will appear. The messages will indicate if the error can be manually corrected after the install. To save a copy of the full install log, click the Yes button and a file will be created on your desktop. After that you will receive a dialog box where you can

decide to complete the install or cancel the install. If you click OK to complete the install all of the files for the installation will be left in place. If you click Cancel all components will be uninstalled.



Step 9: Installation of Sample application

If "Sample SQL database" was selected on the software to install page, the "Install Sample Application" program will start up automatically and display this page.



- Enter the URL to connect to your server – enter the url to connect to the web server. For a server the default is normally okay.
- Enter your server userid – enter a privileged userid that is a System Administrator for the Callisto server. Normally this is the same userid entered for the Web Service User Credentials that is automatically setup as a Callisto System Administrator. (Here should be the **User ONE.**) **User Id must be entered in the full format of domain\username.**
- Enter your server password – enter the password for the userid.

(Note: The Install_Sample_Application can be run at any time from the short cut link on the desktop. If you “Close” without actually installing the “Sample” app, you can install it later.)

Step 10: After Installation making Sample database available

After successful installation of the server, Deploy the Sample database to make it available for reporting:

1. Open the **Modeler**, and select the **Sample** database.
2. Select the **Deploy** action to build the Analysis Services database and make the application available for Excel reporting. At this point only Administrators on the server will have access.

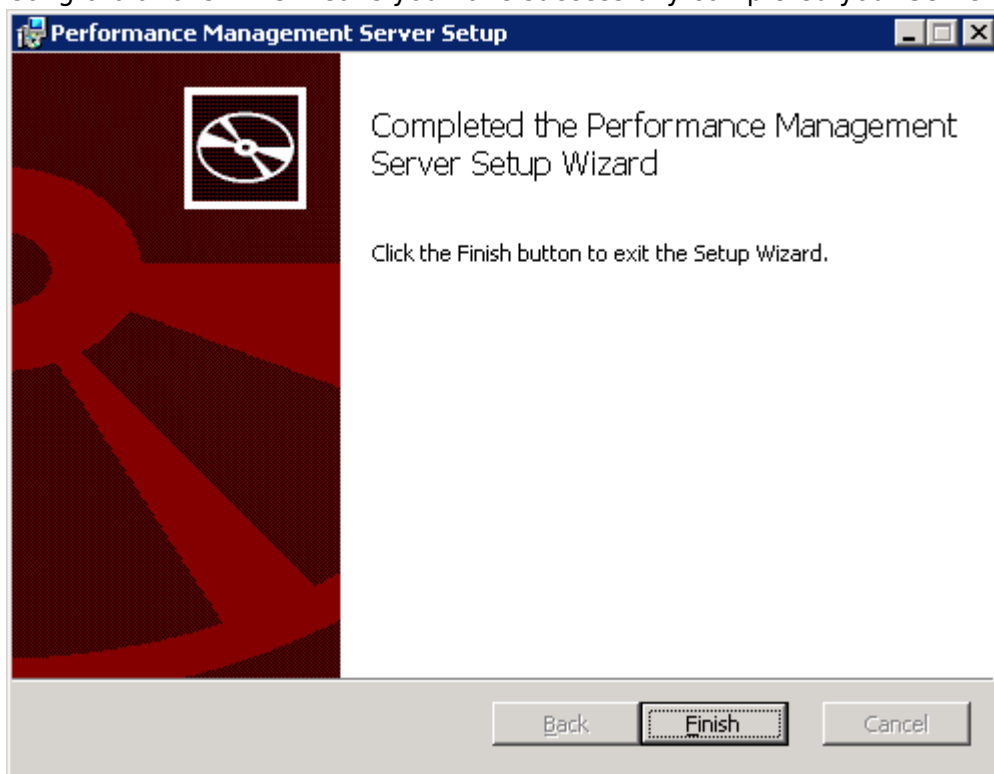
To grant full write access to some users:

1. Select the Security Roles page, and open the T1 security role.
2. On the T1 role page, select the Role Members tab.
3. Click Check Out so you can make changes.
4. For all users add their windows user names to the list.

5. Click Check In and save your changes.
6. Click Deploy Role for users to see the effect of your changes.
7. At this point, this list of people can access the Sample database from the Excel Add-in and write data from input schedules.

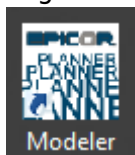
Step 11: Installation Complete

Congratulations. This means you have successfully completed your Server installation.



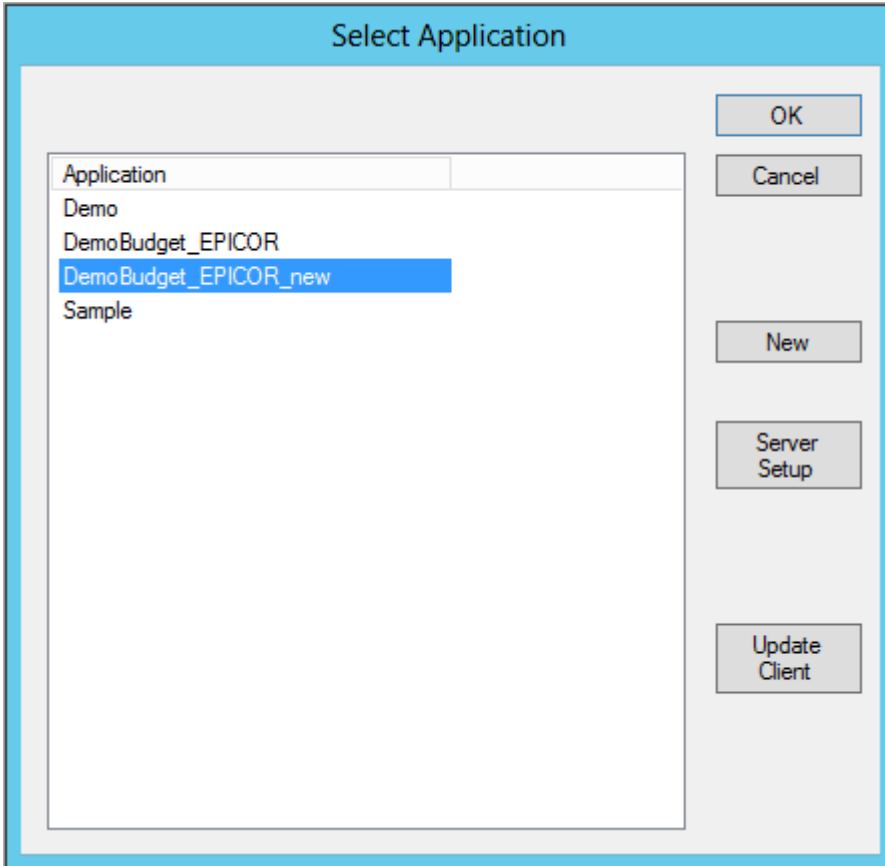
Install the License File

1. Login "Modeler"

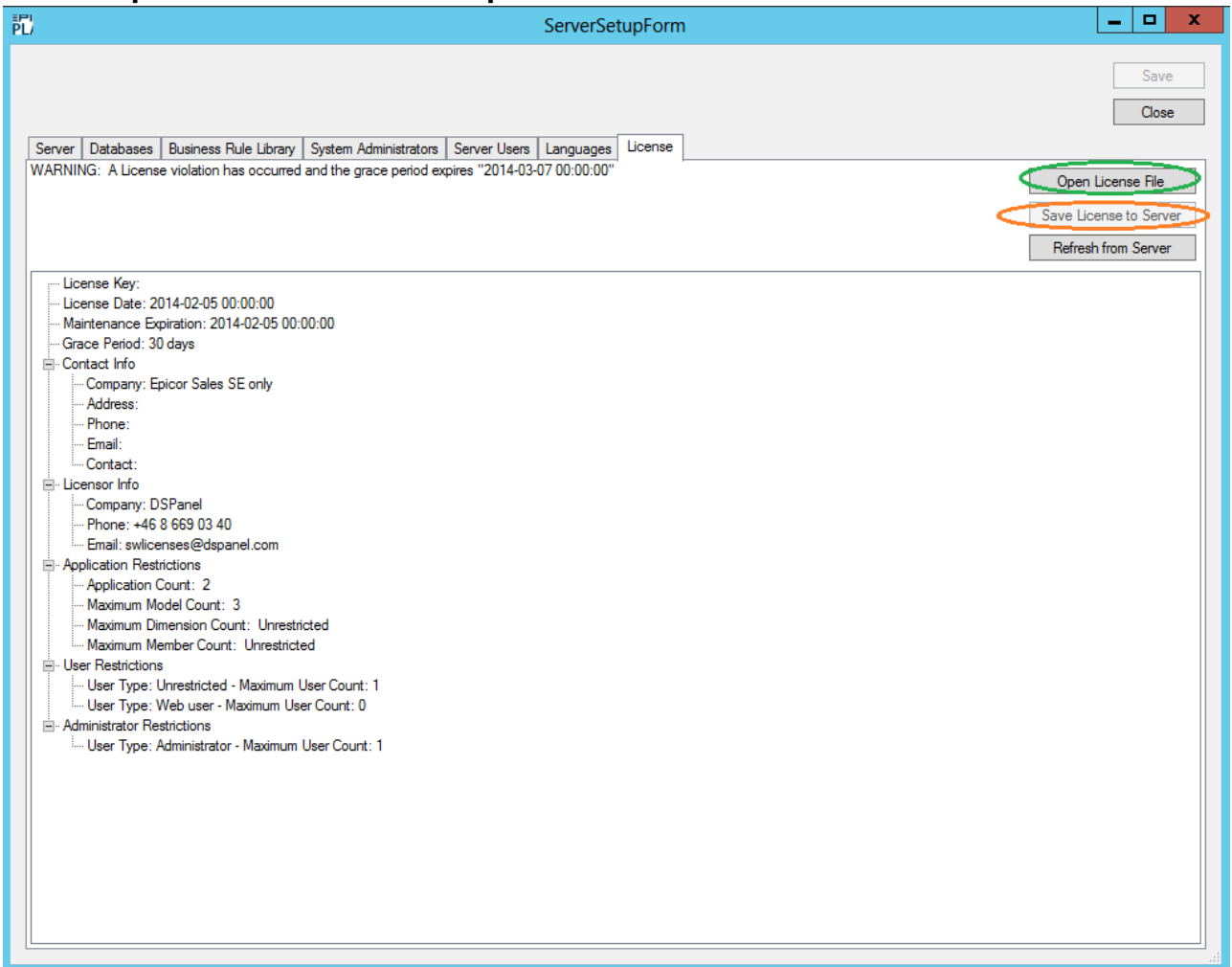


When trying to login to Modeler, if the normal login name is **domain.local**. The user needs to be entered as **domain.local\name** also in the modeler, not as domain\name. (It works sometimes anyway but it might give wrong menu when you login excel client.)

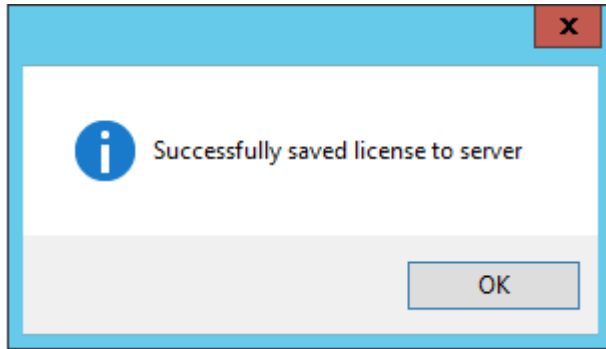
2. **Select Application** window will pop up, click on **Server Setup**



- 3. In **ServerSetupForm** window -> choose **License** tab -> click on **Open License File** -> select **.lic** file in **pcDOWNLOAD** folder -> **Open** -> click on **Save License to Server**



- 4. **Successfully saved license to server** window will pop up, click on **OK**



Analysis Services Access to SQL

A common problem encountered on the first Deploy attempted on a new server is caused by an incomplete setup of SQL Server database security on a new installation of SQL Server and Analysis Services. By default, a new installation of Analysis Services is not granted access to SQL Server databases. For the UserID that Analysis Services is configured to run as, you must configure SQL Server Security to grant that user access to SQL Server databases.

Multi-Server Installation

To install in a multi server environment, you only need to run the install on the Web Server. The first UserID entered in **Step 7** for the Web Server User Credentials must have system admin rights in SQL Server and Administrator rights in Analysis Services. [Multi-Server Installation Details](#)

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Last update: 2020/10/12 14:52

