



Installing and Configuring One Analytics

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Technical Guide

CAPITA

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01 / Introduction

Purpose

This document describes the installation and configuration of the One Analytics software.

Overview and Scope

One Analytics is a reporting tool that is installed alongside an existing Capita One environment. It requires a Microsoft SQL database as an interface between the One Oracle database and the Tableau reporting software that is used to analyse the data in the One Oracle database.

Prerequisites

- An existing One environment, with hardware that meets the minimum OTRA specification.
- SQL Server 2012 R2 Standard Edition or higher.
 - Mixed-mode authentication enabled.
- Oracle Client 12.1.0.2, both 32-bit and 64-bit, configured to connect to any relevant One Oracle databases.
- If you require a secure connection to the Tableau server, Tableau server must have exclusive access to port 443.

Naming Conventions

The One Analytics server software is a customised version of the Tableau server software. Generally, the terms One Analytics server and Tableau server are interchangeable, although this guide uses “One Analytics server” whenever possible. “Tableau server” is used only if the software could not be customised, such as the Tableau Server Configuration utility.

What’s new in this release

There are two new entries in the One Analytics Console web.config file that must be completed, UsingPrimeAuthentication and TableauServerExternalUrl. For more information, see [Configuring the One Analytics Console](#) on page 29.

02 / Installing the Data Warehouse

Introduction

After installing and configuring the SQL Server, you can install and populate the One Analytics Data Warehouse. The data warehouse installer, `ONEAnalyticsDeployment.Input.ps1`, is included in the Data Warehouse folder of the release media. You must also configure the ETL parameters.

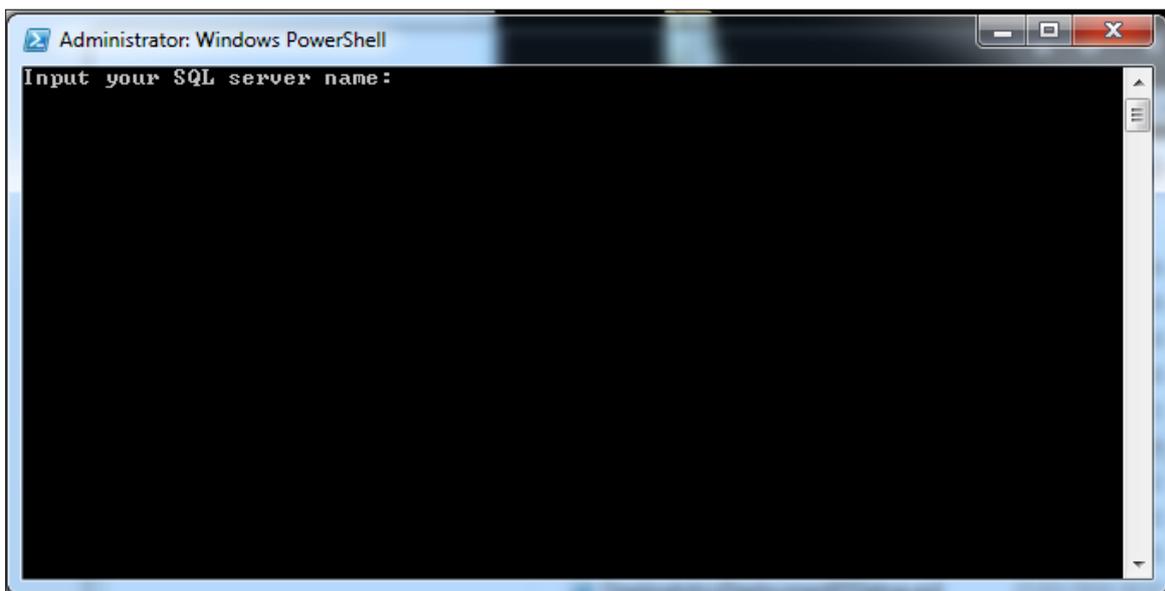
Installing the Data Warehouse

The data warehouse is installed and upgraded using the `ONEAnalyticsDeployment.Input.ps1` script. You can run it from any machine with access to the One Analytics SQL server, however it is recommended that you run it directly on the One Analytics server. The script prompts you to enter all the information it requires. After you have entered all the required information, the script starts the installation/upgrade process automatically. You can monitor the installation progress via the SQL Server Agent jobs list in SQL Server. For more information on monitoring progress, see the [View Job Activity](#) page on Microsoft's [TechNet](#) website. When the One Analytics database is installed or updated, a completion message is also displayed in the PowerShell console window.

IMPORTANT NOTE: Running the DW Deployment job redeploys the ETL jobs. This removes the job schedules associated with the ETL jobs. You should check the existing schedules prior to running the DW Deployment job as you will need to replace them after it has completed.

1. Open a new PowerShell terminal.
2. Within PowerShell, navigate to the folder where the deployment script is located. The deployment script is located in the DW Deployment folder of the installation media.
3. Run the following command to start the script:

```
.\ OneAnalyticsDeployment.Input.ps1
```



4. Enter the details requested by the script. You should enter details for each requested parameter, unless noted in the table below. The parameters are outlined in the following table.

Input Parameter	Details	Example
Input your SQL Server name	This is the server name of the target SQL environment you are deploying to.	Sqlserver1942\mssql
Input the SQL user name	This is the SQL login for the target SQL environment you are deploying to. This user must have permissions to create databases, and manage security roles within the server, along with creating SQL agent jobs and scheduled tasks.	Sqladmin
Input the SQL user password	This is the password of the SQL login you are connecting to the target SQL environment with.	#####
Input the SQL user name to use the ETL if different from above	This is the SQL login used by the Extract, Transform, and Load (ETL) processes (SQL Jobs). Must have permission to create tables, write to tables, run SQL jobs and be able to add jobs into MSDB.	datauser
Input the SQL user password to use the ETL	This is the password for the SQL login used by the ETL processes (SQL Jobs).	#####
Input your Oracle server name	The server name of the One Oracle database that this warehouse will be populated from. Your Oracle client must be configured to allow this.	EMSMAN
Input the Oracle user name	The username for access to the One Oracle database.	onemx64
Input the Oracle user password	The password for access to the One Oracle database	#####
Input your eStart server name	<u>eStart only</u> - The server name\instance name of the eStart SQL server that this warehouse will be populated from. If you do not have an eStart installation in your environment or do not want to analyse eStart data, press the Enter key.	SQLServer12\eStart
Input your eStart database (only asked if a value was entered for the eStart server name)	The name of the database to retrieve eStart data from.	eSuite
Input the eStart user name (only asked if a value was entered for the eStart server name)	The username for the eStart database.	eStartAdmin
Input the eStart user password (only asked if a value was entered for the eStart server name)	The password for the eStart database.	#####
Input your Youth server name	<u>Youth only</u> - The name of the database to retrieve youth data from. If you do not have a Youth installation in your environment or do not want to analyse Youth data, press the Enter key.	EMSMAN_IYSS

Input Parameter	Details	Example
Input the Youth user name (only asked if a value was entered for the Youth server name)	The username for the Youth database.	Onemx64_iyss
Input the Youth User password (only asked if a value was entered for the Youth server name)	The password for the Youth database.	#####
Input the location of the ETL packages folder (referring to the SQL Server)	The local path to the ETL packages folder when accessed from the SQL Server. For example, if the ETL folder is located on the SQL Server's D drive, the path might look like the example provided here.	D:\ONE Analytics\ETL
Input the destination ETL packages folder if different from above (if you are installing One Analytics from a separate box using a remote mapped drive)	The folder into which the SQL jobs and packages will be copied during the install. If you are running the install on the <u>same box</u> that houses the SQL Server, this value will be the same as for the above parameter. If you are running the install from a <u>remote location</u> , the path will use the drive to which you have mapped the SQL Server on this box. For example, if the ETL folder is mapped onto the V drive, the path might look like the example provided here.	V:\ETL
Input the SQL Server to deploy the SQL job, if different from above	The server name\instance name of the SSIS server. If you are deploying the SQL job to the same SQL server defined earlier, press the Enter key. The script will automatically skip ahead to the Input the first job schedule (dd/MM/yyyy hh:mm) step.	SQLServer12\SSIS
Input the SQL user to use the ETL	The username to connect to the SQL SSIS instance specified above. This user must have permission to create SSIS jobs and schedules.	Ssisuser
Input the SQL user password to use the ETL	The password for the user specified above.	#####
Input the first job schedule (dd/MM/yyyy hh:mm)	The date and time the first ETL population will occur. The jobs will be scheduled to run once per day from this date onwards.	29/03/2016 15:00
Input if you would trigger SQL jobs - Yes or No	Yes if you want to run the ETL jobs immediately after creation.	Yes or No
Verbose (see what I am doing) - Yes or No	Yes if you want to enable extra logging details within the installation process.	Yes or No

Configuring ETL Parameters

Within SQL Server, configure the parameters in the **config.Parameters** and **config.LAServices** tables (**Databases | OneAnalyticsDWStaging | Tables**). These parameters must be set before the ETL process is executed. If the parameters are not configured, the default values will be used.

config.Parameters Table

Young Carer

There are two ways of identifying students who are young carers. The Young Carer parameters determine which one is used for the ETL process. After configuration, these parameters populate the **Is Young Carer** and **Was Young Carer** fields for students within the data sources.

Parameter	Use
IsYoungCarerFlag	<p>Set to either 'Student Record' or 'Young Carer History'.</p> <p>If 'Student Record' is set, the 'Carer' flag is used on the student record.</p> <p>If 'Young Carer History' is set, then the 'YoungCarerInvolvementForm' and 'YoungCarerService' parameters <u>must</u> be set.</p> <p>Default value is 'Student Record'.</p>
YoungCarerInvolvementForm	<p>If the 'IsYoungCarerFlag' parameter is set to 'Young Carer History', either this parameter or the 'YoungCarerService' parameter must be populated.</p> <p>This parameter indicates the ID of the involvement form that is valid for young carers.</p> <p>Default value is null.</p>
YoungCarerService	<p>If the 'IsYoungCarerFlag' parameter is set to 'Young Carer History', either this parameter or the 'YoungCarerInvolvementForm' parameter must be populated.</p> <p>This parameter indicates the ID of the service that supports young carers.</p> <p>Default value is null.</p>

Student History Null Registration Type

To deal with issues created by student history records with no registration type (REGTYPE) values, this parameter enables you to decide whether to ignore such records, import them with a null registration type value or to replace the null with a default value in the data warehouse.

Parameter	Use
NullRegTypeBehaviour	<p>To select a new default value, set this parameter to the required code from the lookups table for lookups 0722. You should interrogate the database using SQL to view the contents of this table.</p> <p>To ignore records with null REGTYPE values, enter the value 'IGN'.</p> <p>To import records in spite of a null REGTYPE value, leave this field blank.</p> <p>Default value is 'OTH' (other).</p>

Null Inactive Reason Code

When student records are flagged as inactive but no reason code is provided to explain why, this parameter enables you to decide whether to permit such records as they are, or to replace the null with a default value.

Parameter	Use
NullInactiveReasonCode	To select a new default value, set this parameter to the required code from the lookups table for lookups 0048. To permit null values in the reason code fields, set this parameter to 'LEV'. Default value is 'DEC' (deceased).

Minimum and Maximum School Age

To identify if students should be attending compulsory education, and to populate the **Missing Education** field, define the age range for your LA using these two parameters.

Parameter	Use
MinimumSchoolAge	Minimum statutory age at which children are required to be in education. Default value is '5'. NOTE: Default value is based on legislation for England.
MaximumSchoolAge	Age at which children are no longer required to be in education. Default value is '18'. NOTE: Default value is based on legislation for England.

Early Years Provider Type

Current descriptions for Early Years provider types are provided by the default values for the following parameters. You can change the description for the provider types by updating these parameters.

Parameter	Use
EarlyYearsProviderTypeB	Provider Type: B Default value is 'School'.
EarlyYearsProviderTypeD	Provider Type: D Default value is 'Child Minder'.
EarlyYearsProviderTypeO	Provider Type: O Default value is 'Independent'.
EarlyYearsProviderTypeNull	Provider Type: Null Default value is 'Not Provider'.

eStart

If you do not use the default setting (where the eStart member ID is matched to the One person ID) to populate the EMS_Id field in the member table, you must configure one of the two parameters. The value entered must match the original name exactly, otherwise a null value will

be returned. If a null value is returned for both parameters, the default setting is assumed, and the native EMS_Id column value is used.

Parameter	Use
eStartEMSMemberCustomLabel	If you use a custom label field to populate the EMS_Id field in the member table, the name must be entered into this parameter. It must match the original name exactly.
eStartEMSExternalSystemIdCompany	If you use an external system identifier field to populate the EMS_Id field in the member table, the name must be entered into this parameter. It must match the original name exactly.

Vulnerable Risk Groups

This parameter displays the risk category codes that are available to be tracked within One analytics.

Parameter	Use
PermittedRiskCategories	To select risk categories to be tracked, enter the required risk category codes from lookups table 0520. Separate codes with a comma, e.g. DD, DC, PP. Where a risk category code is not stated, the associated risk category is not displayed against students in One Analytics.

config.LAServices Table

Services Involved With

Student-service relationships (defined as activities, involvements or provisions related to the indicated service) can be checked by logic implemented into the ETL. To enable this, the services must be entered into the **[OneAnalyticsDWStaging].[config].[LAServices]** table. The following information is needed:

Column Name	Entry
Service_Id	The ID of the service you want to include from the SSS_Services table. This can be any relevant value from Select Service_ID from SSS_Services.
One_Service_Name	The name of the service as known within the One system. Select the description from SSS_Services, e.g. 'Childcare', 'Young Children's Services'.
DW_Service_Column_Name	The name to be used to create a column for the service within the data warehouse. The new column uses a tri-state (true/false/null) field to indicate whether a person currently has (true), has had in the past (false), or has never had (null) a relationship with this service. The names must follow column naming conventions, e.g. 'Young_Career_Service'.

03 / Installing the One Analytics Server

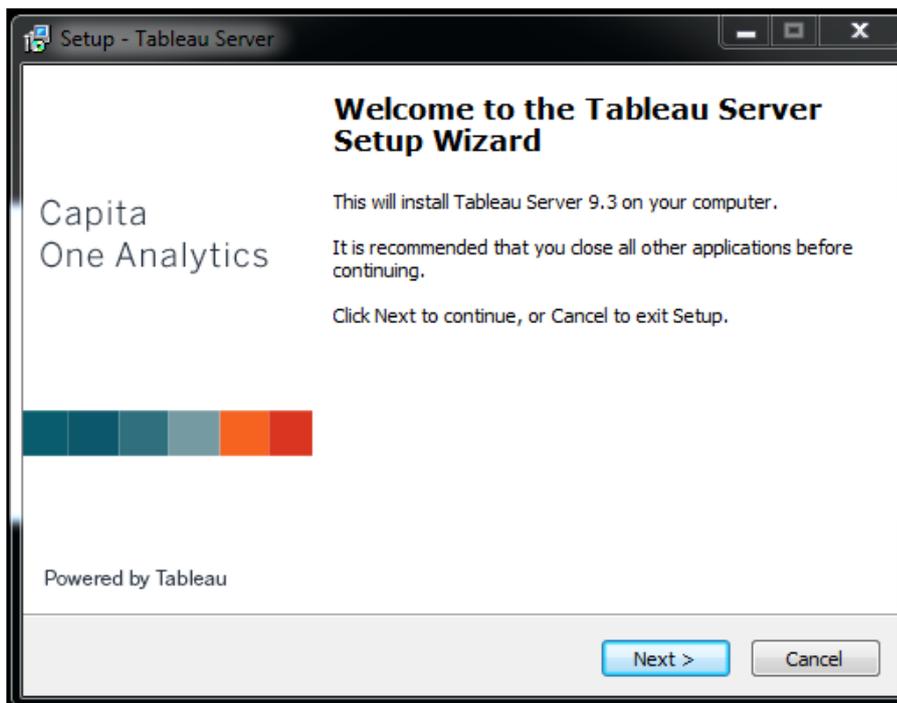
Introduction

After installing and configuring the SQL Server and the data warehouse, you can install the One Analytics (OA) server. The OA server installer, TableauServer-n-n-n-CapitaServer-64bit.exe, is provided in the OA-Tableau-10-3 release media on Solus.

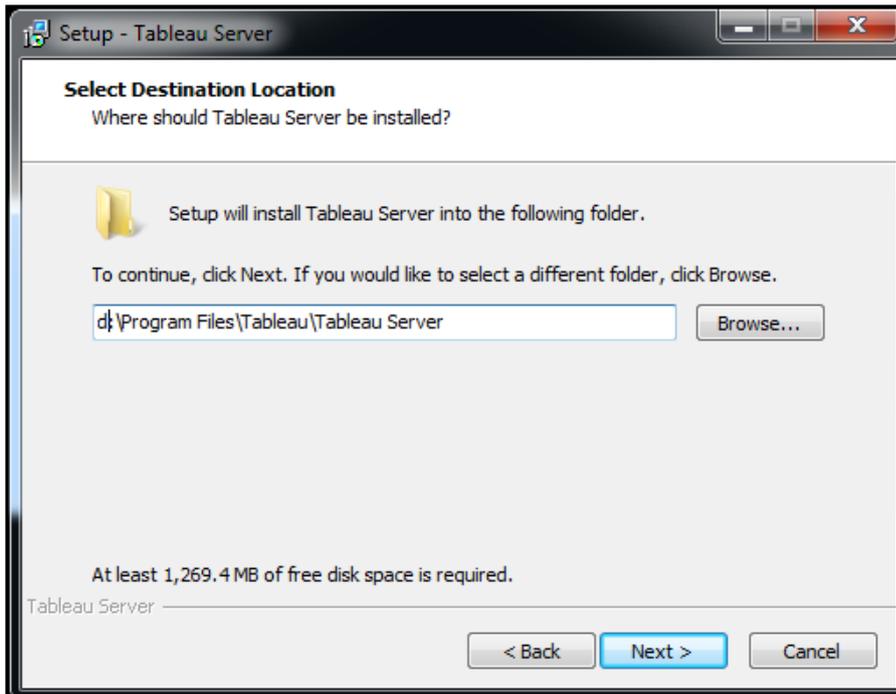
Installing the One Analytics Server

1. On your OA server, double click the TableauServer-n-n-n-CapitaServer-64bit.exe to display the Tableau Server Setup wizard.

NOTE: If you are presented with a security warning when you try to run the installer, click the **Run** button

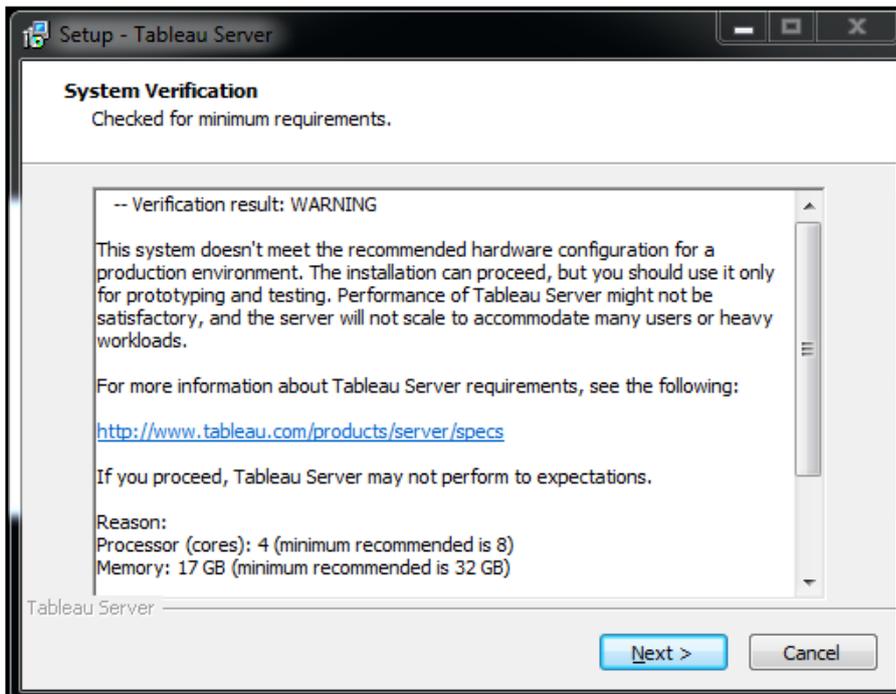


2. Click **Next** to display the **Select Destination Location** page.



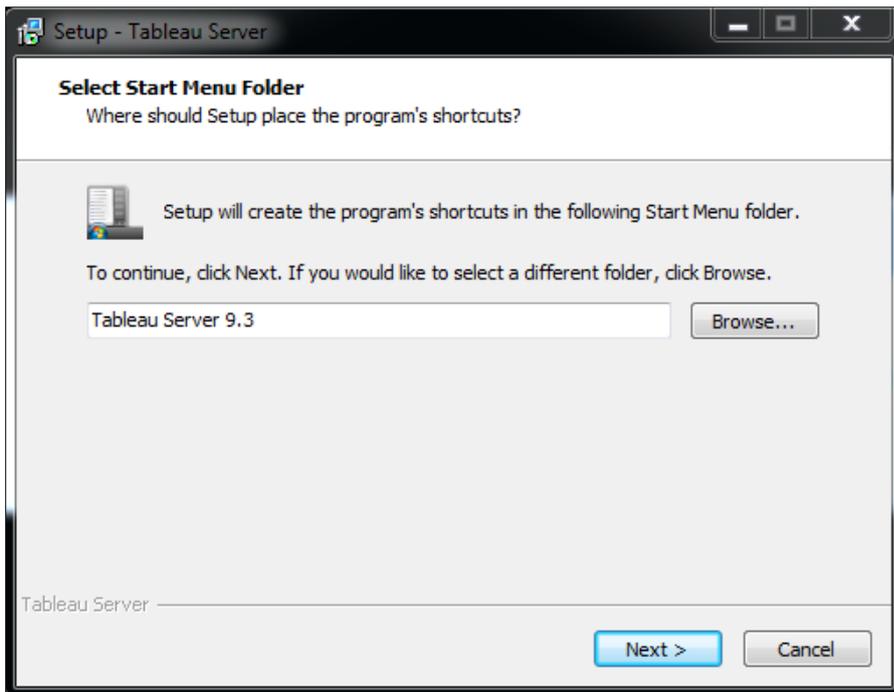
3. If you want to change the installation location for the Tableau Server, click the **Browse** button and choose the required location.
4. Click the **Next** button to display the **System Verification** page.

The installer will now extract all of the files required for the installation process to the local drive, then perform checks to ensure your server meets the minimum requirements for installation. The minimum requirements can be found on the Tableau website (<http://www.tableau.com/products/server/specs>). If your server fails the minimum requirement checks, you cannot continue the installation process.

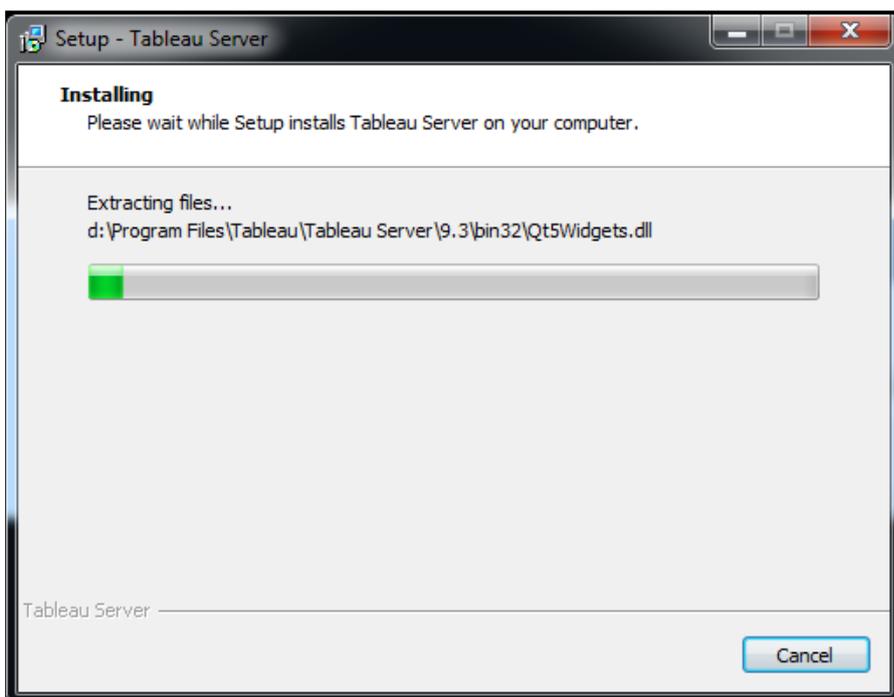


5. After the verification completes, click the **Next** button to display the **Select Start Menu Folder** page.

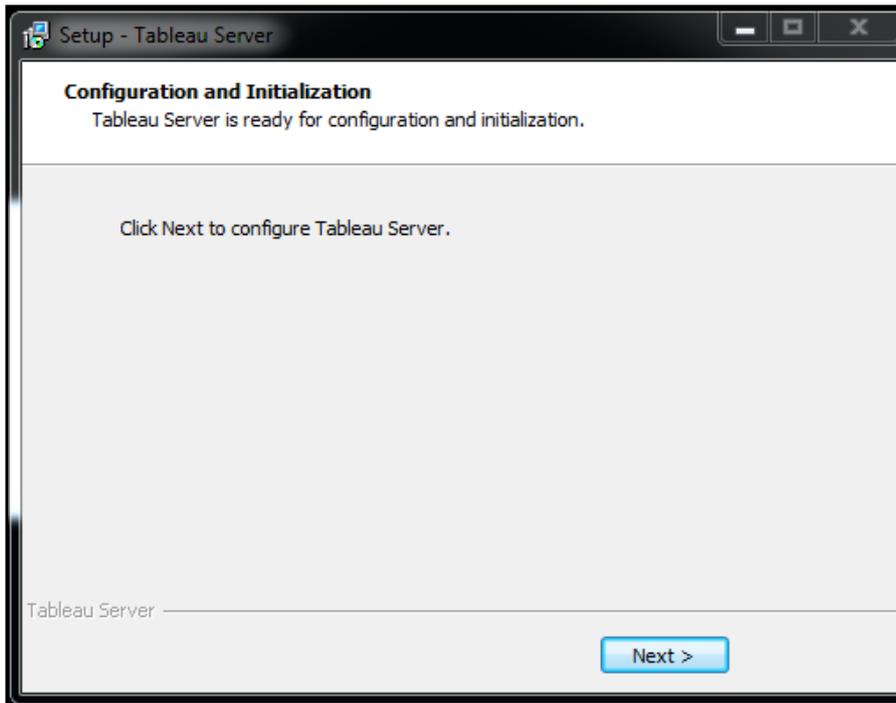
Installing the One Analytics Server



6. Confirm your start menu folder name or, if required, click the **Browse** button to select a different location.
7. Click the **Next** button to display a summary page.
8. Click the **Install** button to start the installation process

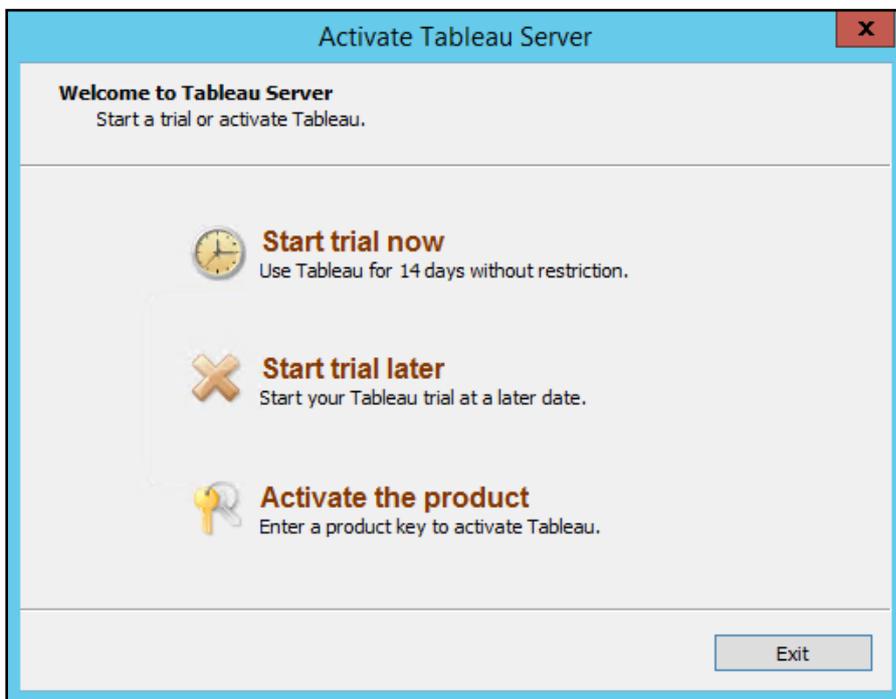


After the installation completes, you must activate and configure the One Analytics server.

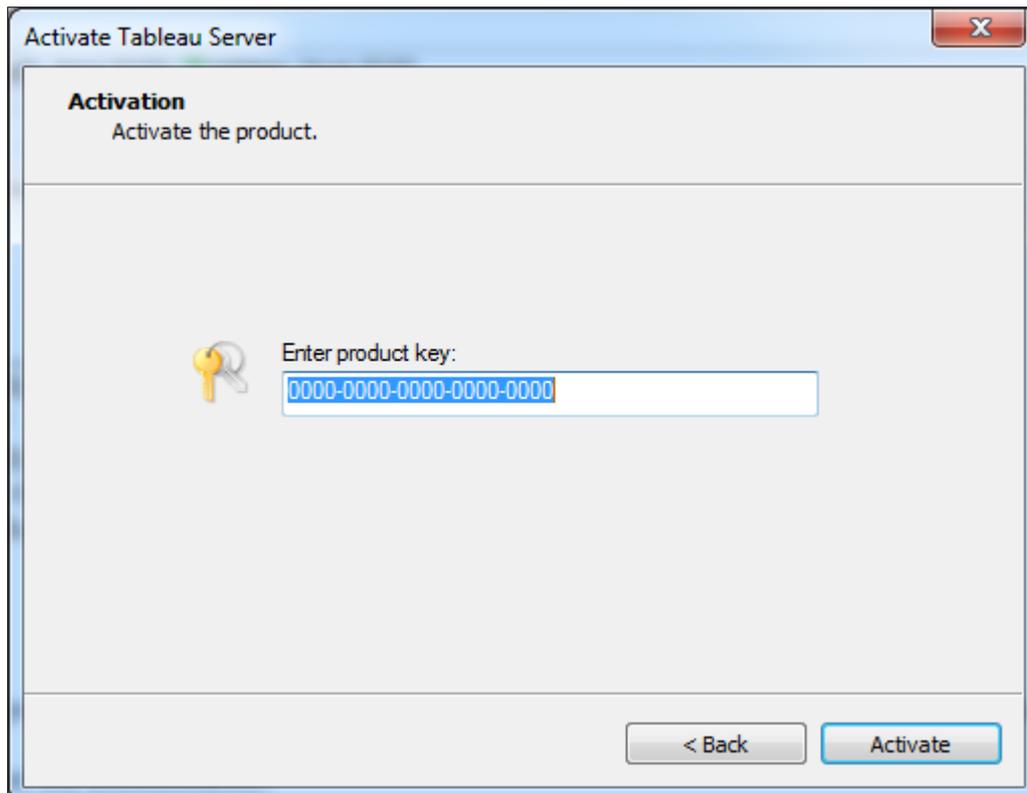


9. Click the **Next** button to display start the **Activate Tableau Server** wizard.

IMPORTANT NOTE: License activation requires a connection to the Tableau licensing services, hosted externally. If the server being used for installation does not have external internet access, please contact the One Service Desk for information regarding offline activation.



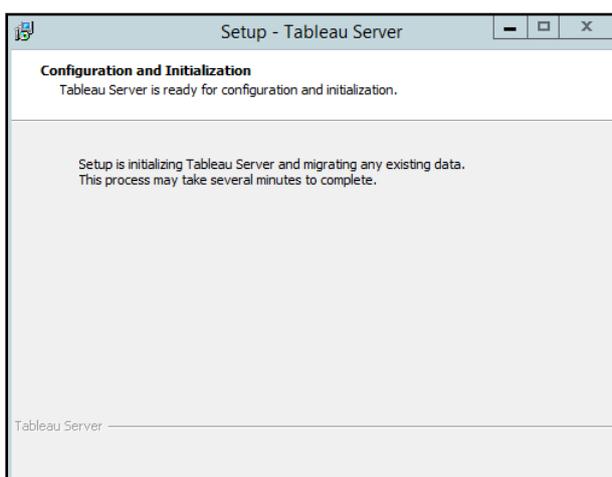
10. Click the **Activate the product** option to display the **Activation** page.



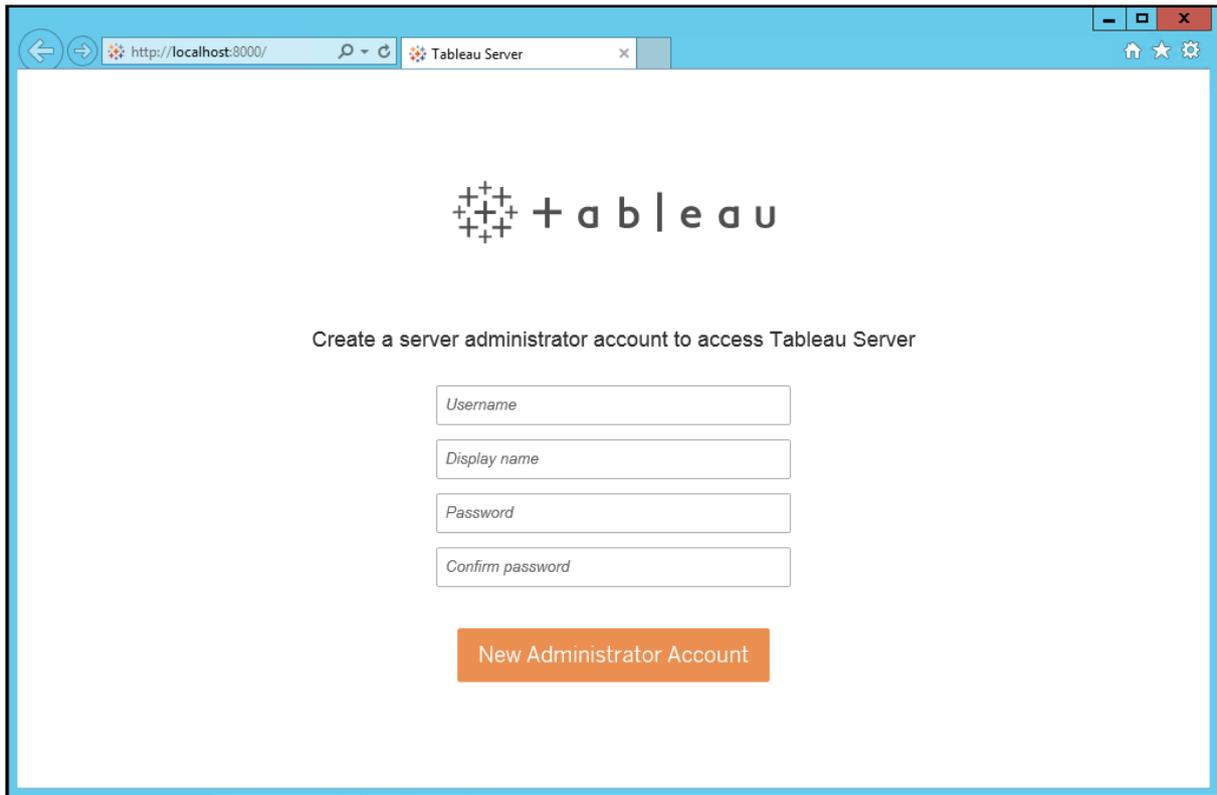
A licence key can be obtained from your One administrator as required.

11. Enter the licence key and click the **Activate** button to activate the product.
After the Tableau activation, the installer will open the final configuration dialog.
12. Enter the required information into the Tableau Server Configuration tool. For more information on configuring the Tableau server, see [Configuring the One Analytics Server](#) on page 14.
13. After completing the server configuration, click the **OK** button to close the **Tableau Server Configuration** tool.

The installer will now proceed to complete the installation.



The installation starts. The installation can take some time and there is no progress bar. When the installation is complete, the **Tableau Server** web page is displayed.



14. Create an administrator account by entering a **Username**, **Display name** and **Password**.
15. Click the **New Administrator Account** button to create the new administrator. The server administrator role is used to log in to the server and to create other users.

Adding One Analytics server components to your PATH environment variable

You should add the One Analytics bin folder to your Windows PATH environment variable. This ensures that all the One Analytics executables are easily accessible throughout the system. Although the folder location is dependent on where you chose to install the One Analytics server components, the default location is C:\Program Files\Tableau\Tableau Server\<<version number>\bin.

For more information on adding a folder to the PATH variable, refer to the [How to: Add Tool Locations to the PATH Environment Variable](#) page, available from Microsoft.com.

04 / Configuring the One Analytics Server

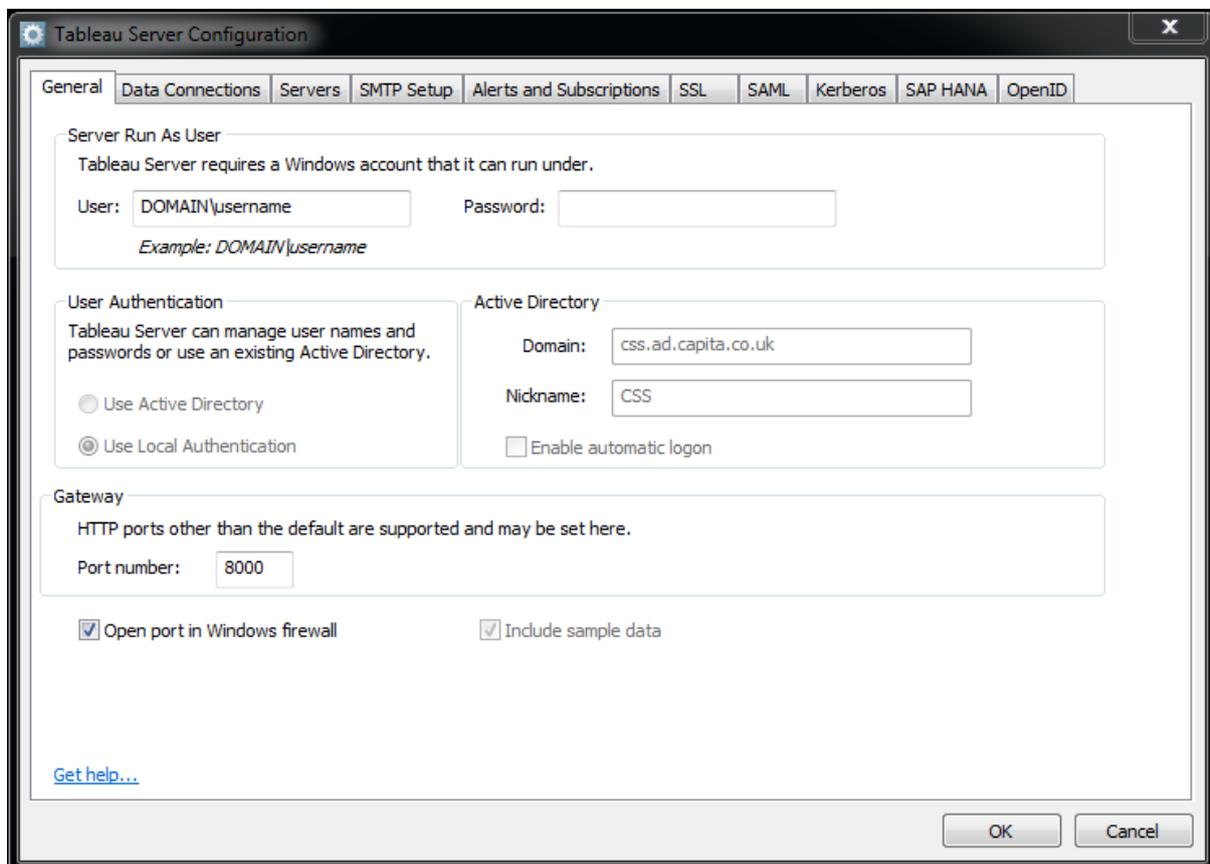
One Analytics Server Configuration

You must configure several areas of the One Analytics server using **Tableau Server Configuration** tool, which is automatically opened as part of the One Analytics server installation process. The tool can be accessed later via **Start | Tableau <version number> | Configure Tableau Server**.

When you have entered you configuration details in the each section, click the **OK** button to save your changes.

IMPORTANT NOTE: Only the Tableau settings relevant to configuring One Analytics are covered in this document (General, SMTP Setup, Alerts and Subscriptions and SSL). For information on other areas of configuration within the One Analytics/Tableau Server, refer to Tableau Server documentation.

General

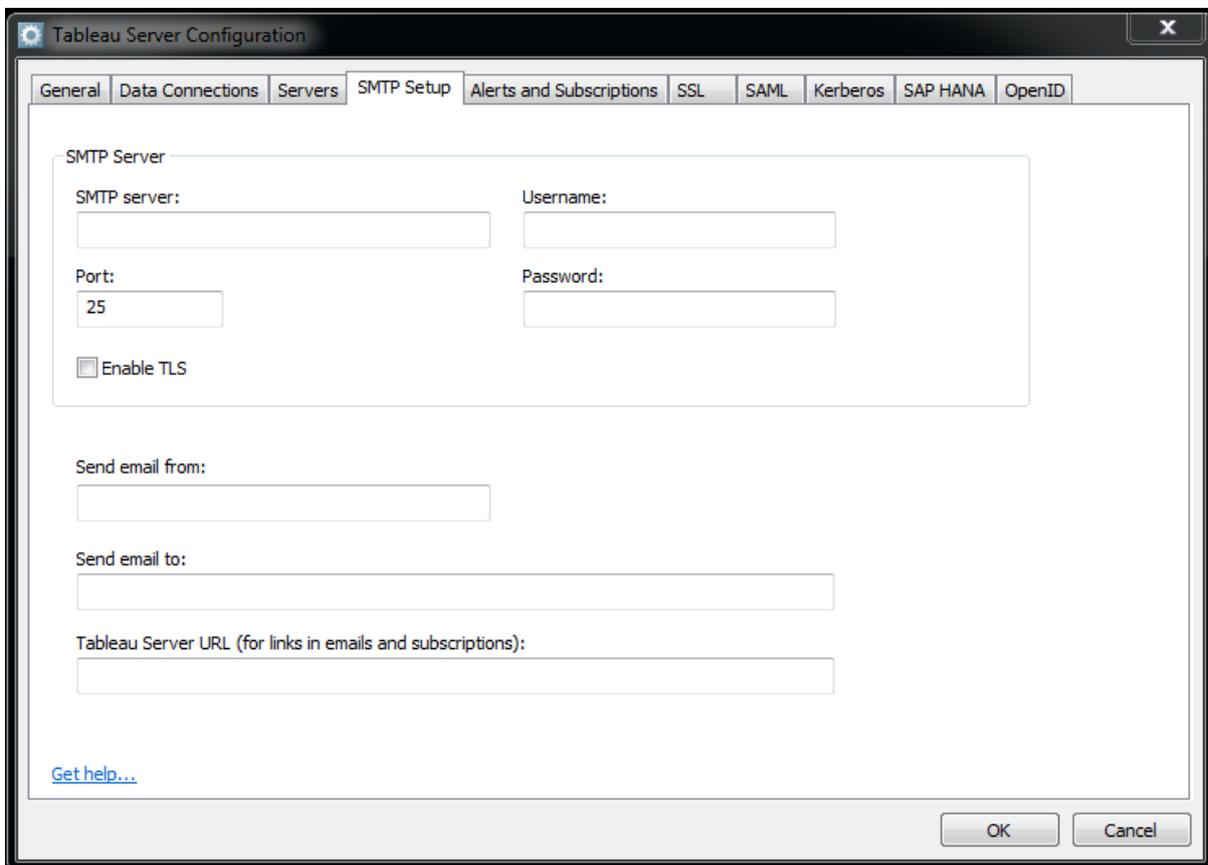


Setting Name	Details	Example
User	The user identity/service account that the OneAnalytics/Tableau Server will run as. Use the built-in NetworkService account or a domain account. If you use the NetworkService account, no password is required.	DOMAIN\Username

Setting Name	Details	Example
Password	The password of the user identity/service account specified above. The password is required to save any changes to the configuration. If you used the NetworkService account in the previous step, no password is required.	#####
Port Number	The port number that One Analytics/Tableau Server will run on. Default is 8000.	8000
Open Port in Windows Firewall	If selected, the configuration utility will attempt to open the entered port within the Windows firewall on the current server. If other firewall software is in use, this may need to be done manually.	

SMTP Setup

If email delivery is required as part of the operation (either system alerts or subscriptions), the settings must be configured here.

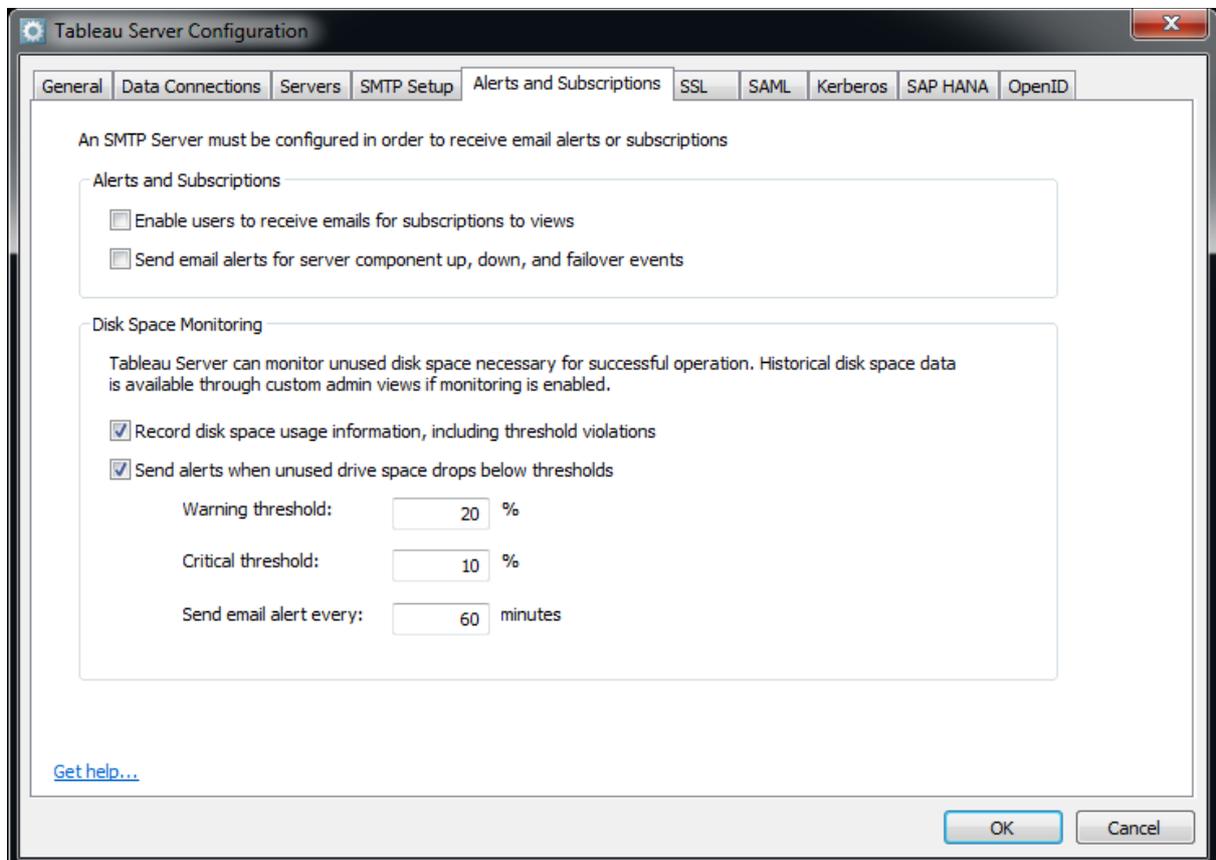


Setting Name	Details	Example
SMTP Server	Name or IP address of the SMTP server.	xxx.xxx.xxx.xxx
Username	The username to use to authenticate to the SMTP server.	DOMAIN\Username
Password	The password to use to authenticate to the SMTP server.	#####

Setting Name	Details	Example
Port	The port to use for connection to the SMTP server. Default SMTP port is 25.	25
Send Email From	The email address that system generated alerts and subscriptions are sent from.	user@email.com
Send Email To	The email addresses/distribution list that system alerts (in the event of any system failure) are sent to.	user@email.com
Tableau Server URL	The URL used to link to visualisations and dashboards within One Analytics Server on alerts and subscription emails.	http://oneanalyticsserver:8000

Alerts and Subscriptions

After the SMTP Server is configured, the alerts/emails that are sent to users need to be configured via the **Alerts and Subscriptions** tab.

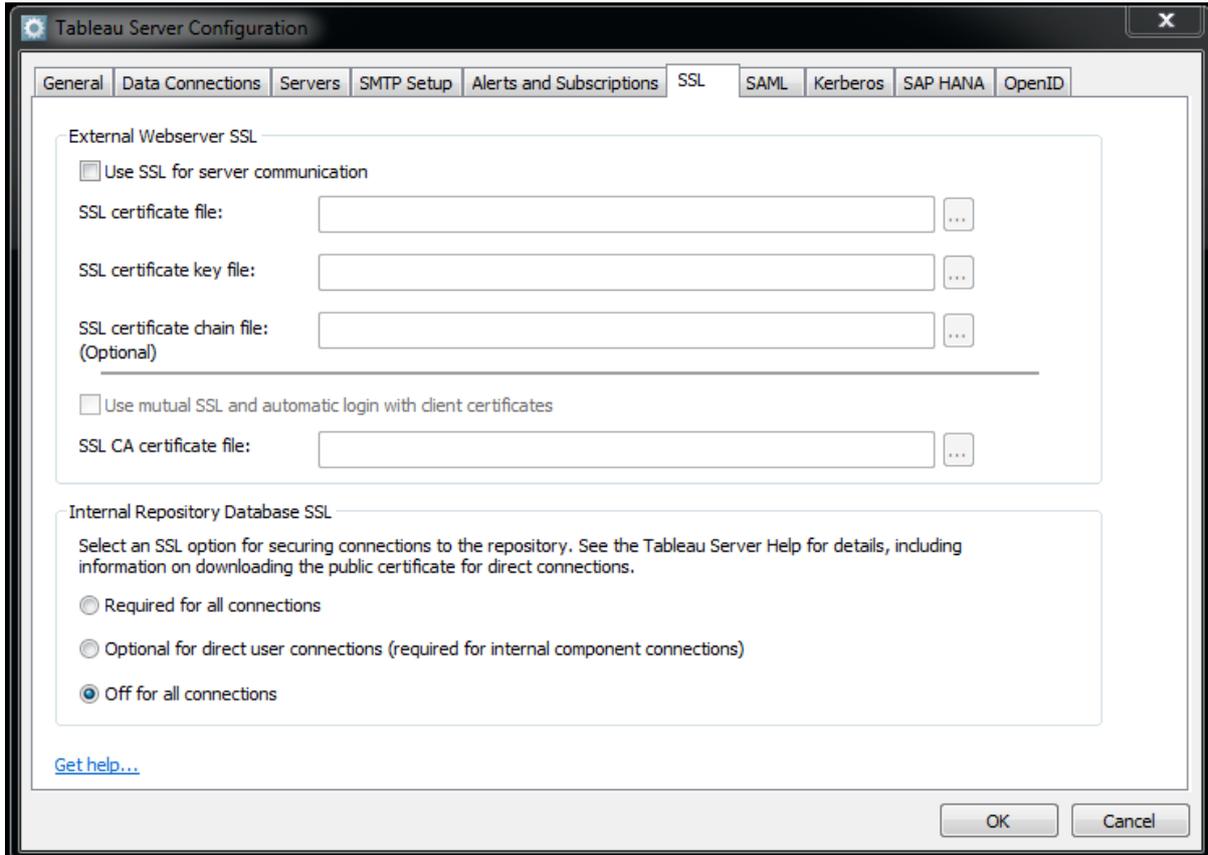


Setting Name	Details	Example
Enable users to receive emails for subscriptions	Allow users to receive emails when subscribing to views within the server.	
Send email alerts for server component...	Allow the server to send alert emails to the configured groups on server up/down/fail events.	

Setting Name	Details	Example
Disk Space Monitoring	This section allows system alerts to be sent when certain conditions are met regarding server disk space. For more information on these settings, please refer to the Tableau Server documentation.	

SSL

To secure connections between One Analytics client, server and console applications, you must configure certificate information via the **SSL** tab. The relevant certificate and key files for installation must be provided to complete this step.



Click the **OK** button to save the configuration details. If the Tableau Server Configuration tool was opened automatically by the One Analytics server installer, you will be returned to the installer when you click the **OK** button.

Set additional Server configuration values

A number of configuration settings are required in order to allow the One Analytics Server to integrate with the One Analytics Console site. These settings are managed via the TabAdmin command line utility, available directly on the One Analytics server.

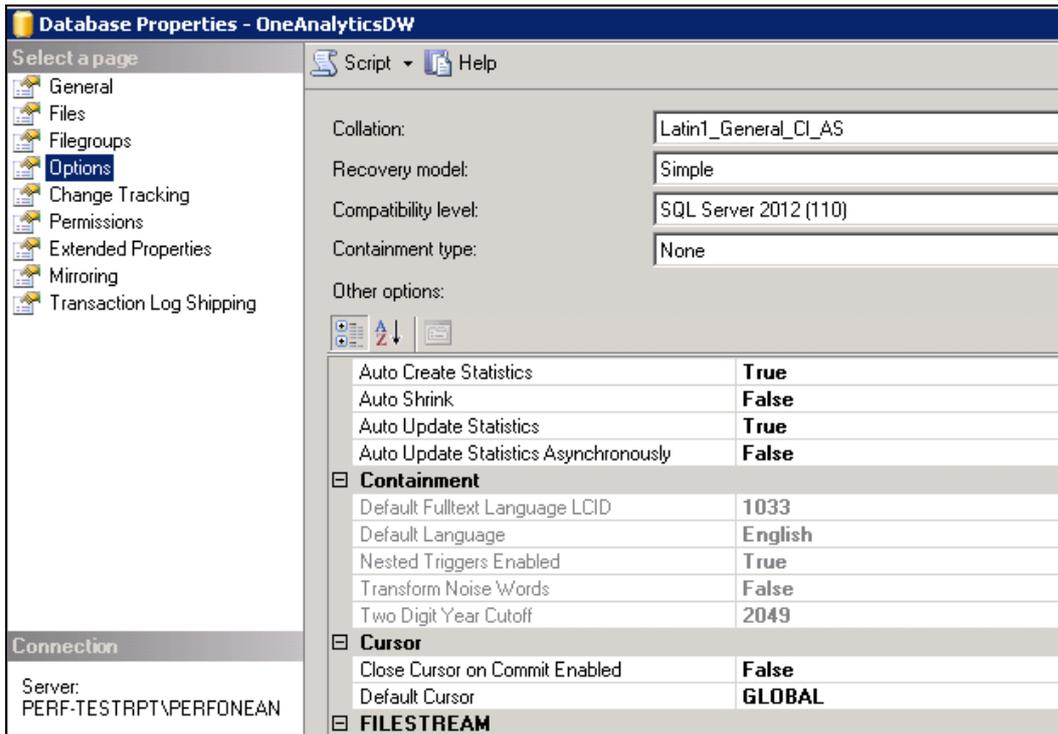
To configure these settings:

1. Locate the ConfigureONEAnalyticsServer.bat file in the Configuration folder on the release media.
2. Open the file in a text editor, and locate the text “xxx.xxx.xxx.xxx”.
3. Replace this with the hostname or IP address of the server hosting the One Analytics website. If more than one address is needed, add multiple IP addresses, separated with a comma.

4. Save the file, and execute the batch file directly from the One Analytics Server

Configure the Data Warehouse backup strategy (optional)

1. Using Microsoft SQL Server Management tool, ensure both OneAnalyticsDW and OneAnalyticsDWStaging are set to simple recovery mode:
 - a. In the **Databases** folder, right click on the OneAnalyticsDW database and select **Properties** from the menu to display the **Database Properties** dialog.



- b. From the **Select a page** panel, select **Options** to display the current settings.
 - c. Ensure the selected **Recovery Mode** is **Simple**.
 - d. Repeat steps a – c for the OneAnalyticsDWStaging database.
2. Create an appropriate maintenance plan for both the ONEAnalyticsDW and ONEAnalyticsDWStaging databases, according to local backup strategy.

Populating One User accounts

The One Analytics server can be configured to use the Single Sign On (SSO) functionality, which enables users to log into the One Analytics server using their One user accounts.

To enable this functionality, a Windows scheduled task must be set up to synchronise One user accounts with the One Analytics server.

The synchronisation process operates by connecting to the One Analytics database to retrieve the user list, before adding/removing users from the One Analytics Server. In order that this process operates correctly, the following two conditions are necessary:

- The user that the Windows scheduled task runs as must have read permissions to the One Analytics Staging Database

- The SysAdmin ETL process must run before the AddUsers scheduled task will bring new user information across to the One Analytics Server. For more information, refer to the Scheduling ETL Processes chapter in the One Analytics Handbook.

NOTE: Any One user that requires access to One Analytics must be a member of a One user group with read, read-write or read-write-delete access to the One Analytics main business process.

Configuring the Settings.ini file

To configure and schedule the user management script to run:

1. From the One Analytics installation media, copy the AddUsers.ps1 and Settings.ini files from the Configuration folder into a new folder on your One Analytics server.
2. Open the Settings.ini file in a text editor and add the following values:

```

Setting.ini - Notepad
File Edit Format View Help
[Tableau Server]
Path=http://10.128.39.155:8000
UserName=OAUserAdmin
Password=#####

[[OneAnalyticsGroup]
GroupName=One Analytics

[SQLSERVER]
SQLDBServer=10.128.39.155,1439
SQLDatabase=OneAnalyticsDWStaging
    
```

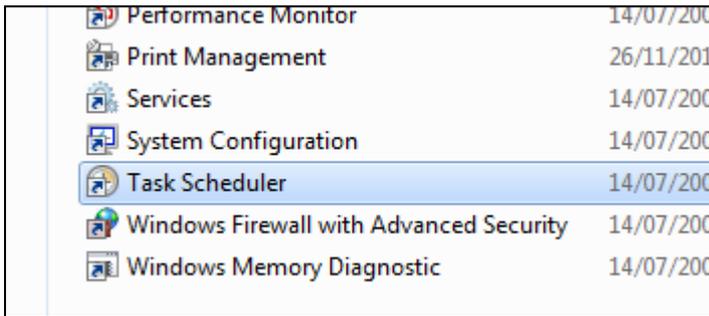
Setting Name	Details	Example
Path	The URL to your One Analytics Server installation.	http://xxx.xxx.xxx.xxx
Username	The username to use to connect to the One Analytics Server.	OAUserAdmin
Password	The password to login to the One Analytics Server.	#####
GroupName	The name of the group in One to use as the One Analytics permissions group. Default should be "ONE Analytics".	ONE Analytics
SQLDBServer	The name/URL to the SQL Server hosting the One Analytics Staging and Warehouse databases.	xxx.xxx.xxx.xxx
SQLDatabase	The SQL database to use to retrieve user information from. Unless specifically stated, this should ALWAYS be ONEAnalyticsDWStaging.	ONEAnalyticsDWStaging
SQLUserName	User that can access the One Analytics SQL database entered above.	sa
SQLPassword	Password for the database user entered above.	#####

3. Save and close the Settings.ini file.

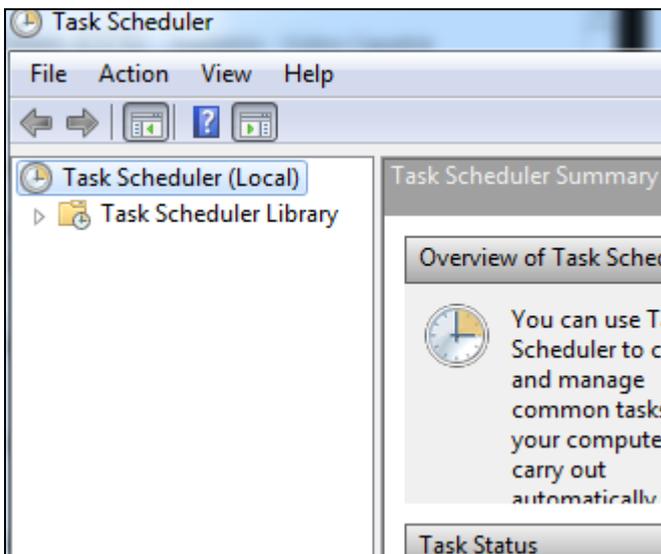
Configuring the Scheduled Task

To configure the user account sync scheduled task:

1. Open **Administrative Tools** from the server **Control Panel**.

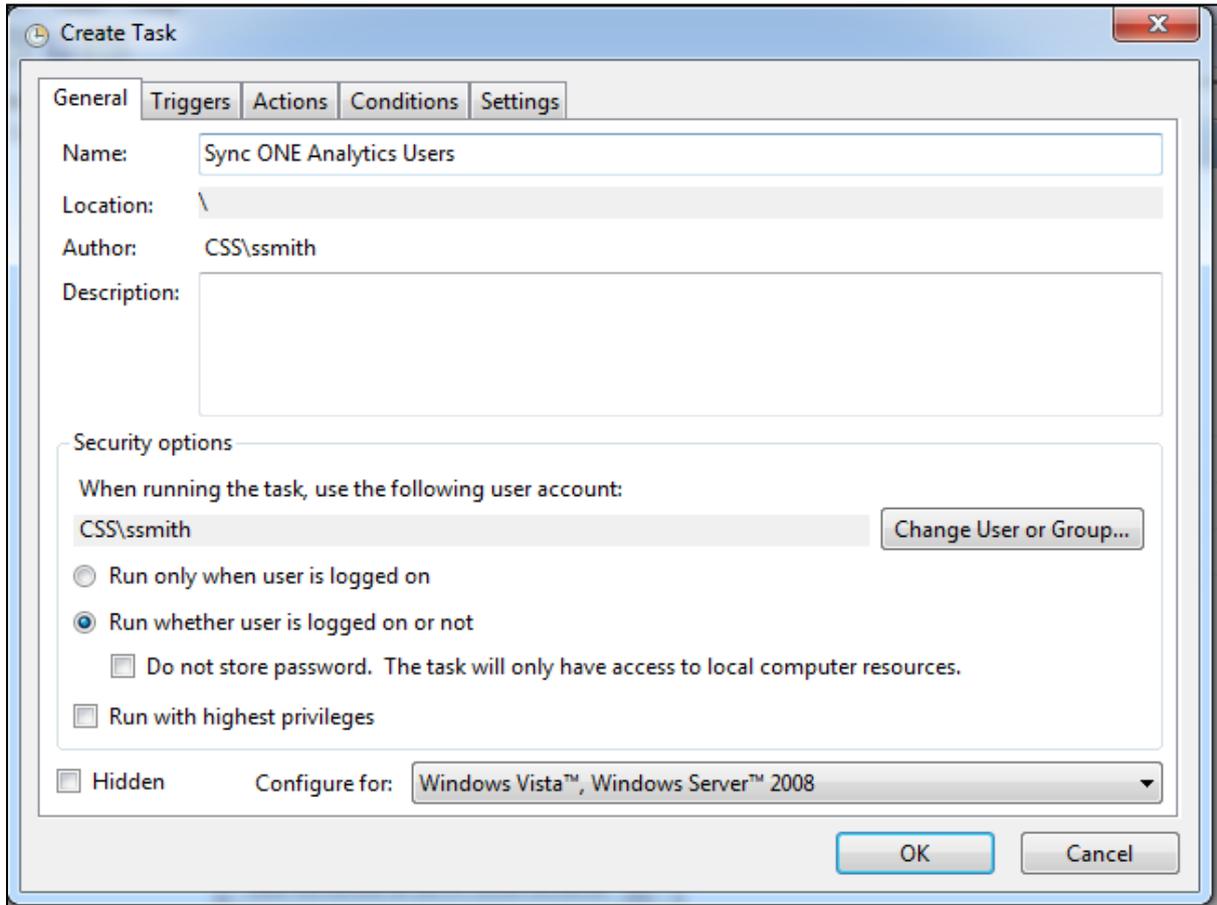


2. Double-click **Task Scheduler** to display the **Task Scheduler** window.



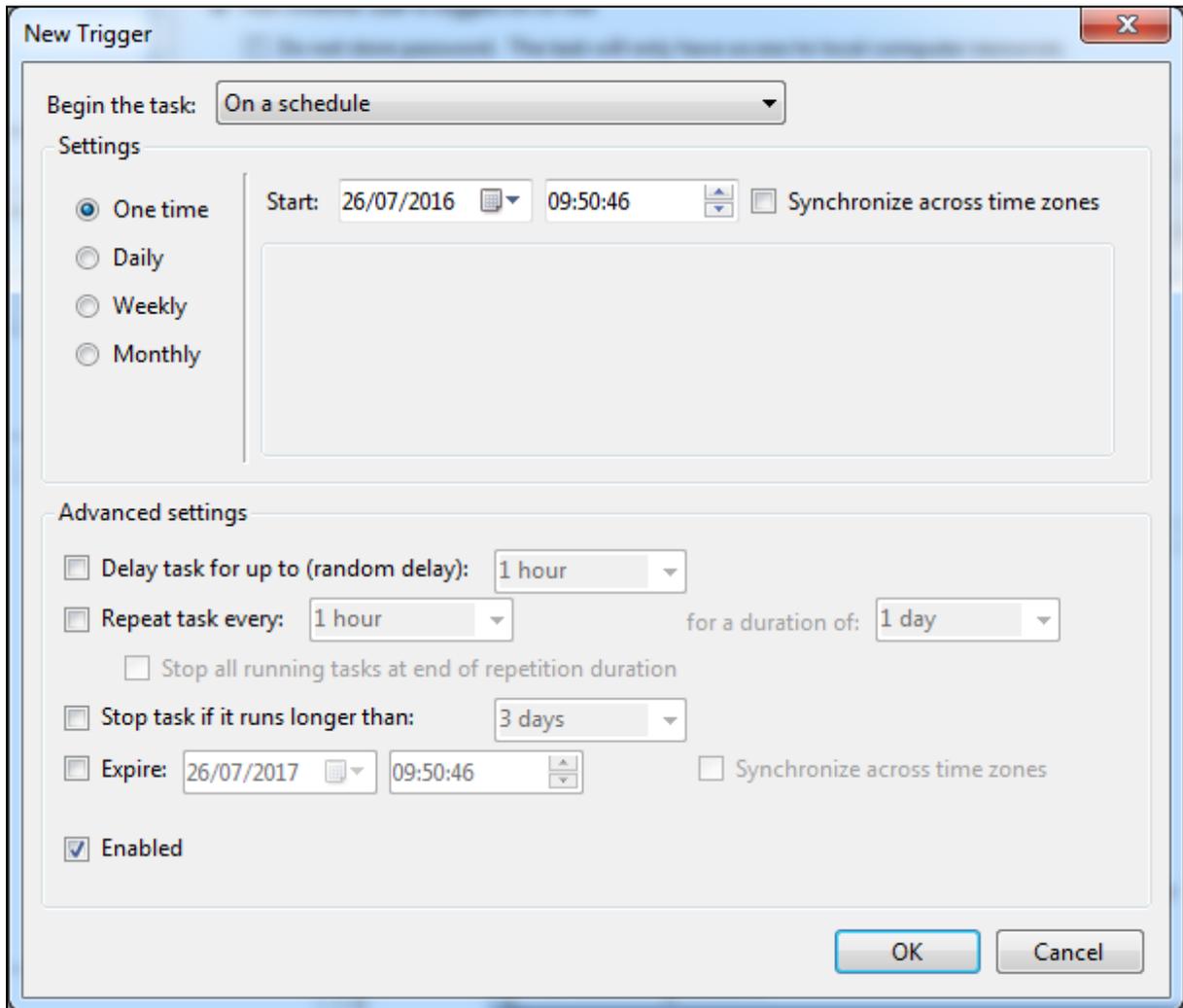
3. In the **Task Scheduler** window, right-click **Task Scheduler (Local)** and select **Create Task** from the pop-up menu to display the **Create Task** dialog.
4. On the **General** tab, enter a **Name** for the task. This is displayed in the **Task Scheduler** window.
5. In the **Security options** area, click the **Change User or Group** button to select the Windows user you want to execute the task. This user must be able to log in to the relevant SQL server and has read access to the One Analytics Staging database.

6. Select the **Run whether user is logged on or not** radio button. When saving the task, you will be asked to enter the password for the selected user.



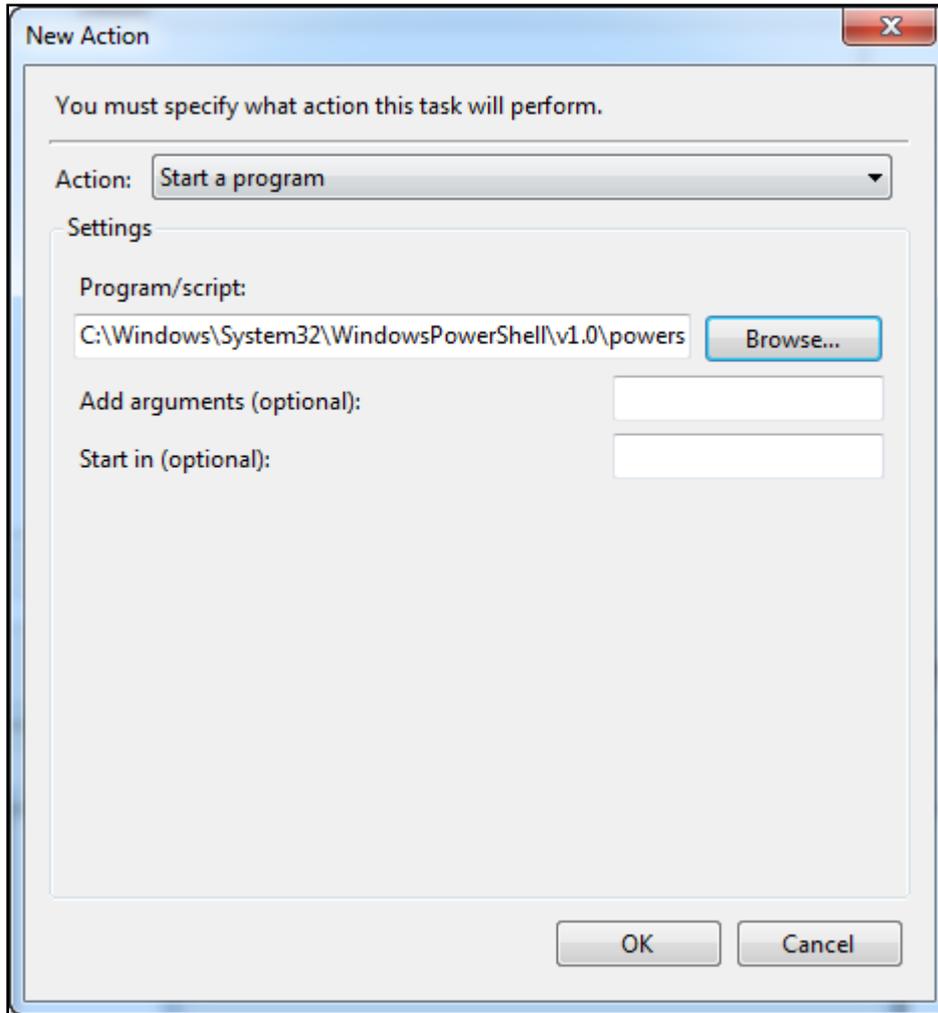
7. Select the **Triggers** tab.
8. Click the **New** button to display the **New Trigger** dialog.

9. Ensure **Begin the Task** is set to **On a Schedule**, and then select a schedule appropriate for your environment. New One Analytics users will only be added to the server when this task runs.



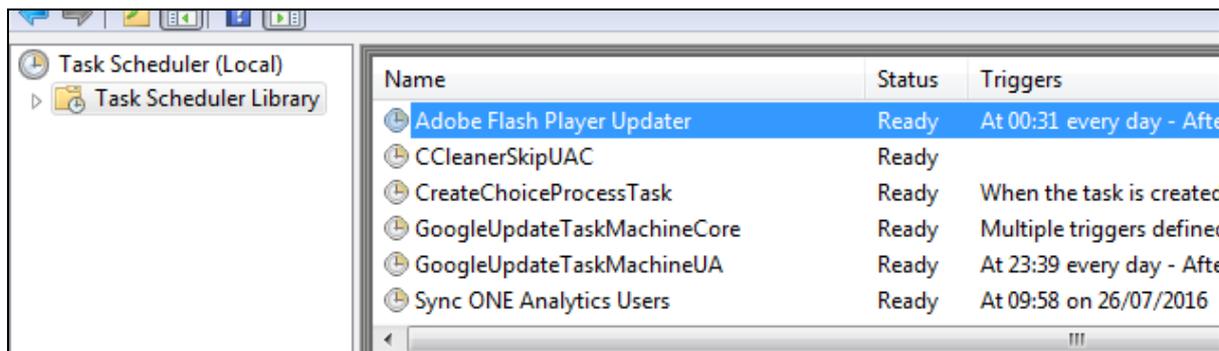
10. Click the **OK** button to save the task.
11. Select the **Actions** tab.
12. Click the **New** button to display the **New Action** dialog.

- Ensure the **Action** is set to **Start a Program**, then click the **Browse** button to select the PowerShell application. By default, this is located in C:\Windows\System32\WindowsPowerShell\v1.0.



- In the **Add arguments (optional)** field, enter `.\AddUsers.ps1`.
- In the **Start in (optional)** field, enter the full path to the folder on your local machine that contains the AddUsers.ps1 script. For example, C:\One Analytics\Scripts\.
- Click the **OK** button to save the action and close the dialog.
- In the **Create Task** window, click the **OK** button to save the scheduled task.

The new scheduled task is now available within the **Task Scheduler Library**.

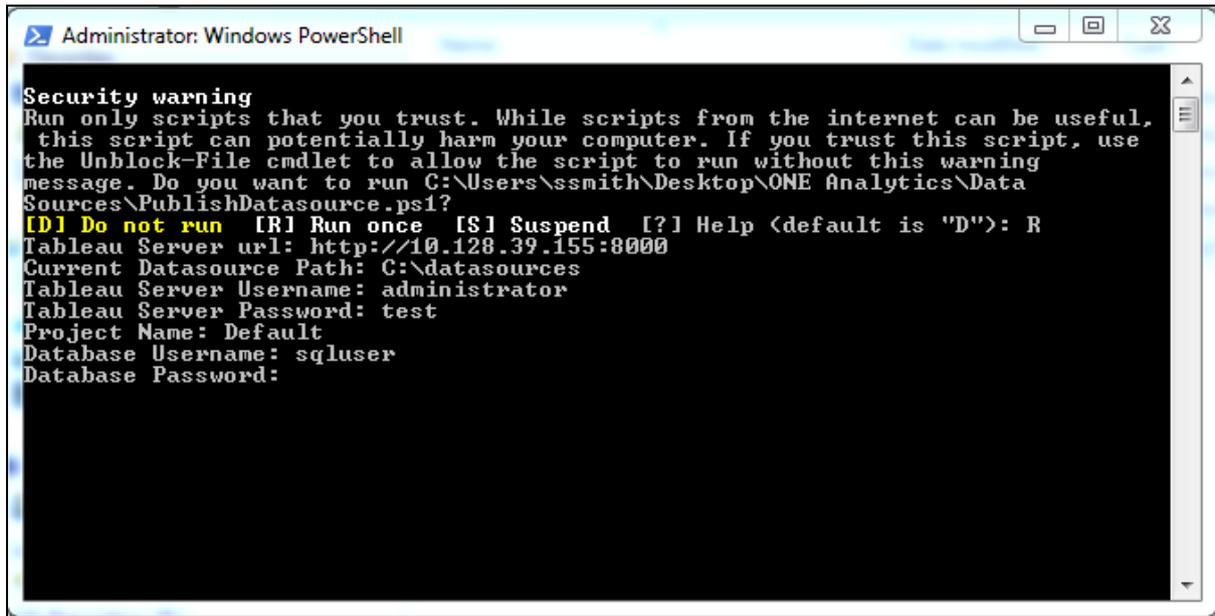


Publishing Data Sources

In order to publish the data sources used by One Analytics, you must run the PublishDatasource.ps1 script available on the One Analytics release media in the Configuration folder.

IMPORTANT NOTE: If you are given a security warning when attempting to run the script, please enter "R" to allow the script to run.

When running, you will be prompted to enter the following details:



Setting Name	Details	Example
Tableau Server URL	The URL to your One Analytics Server installation.	http://xxx.xxx.xxx.xxx
Current Datasource Path	The folder path containing the data source files (part of the One Analytics installation media).	C:\ONE Analytics\Data Sources
Tableau Server Username	The username to login to the One Analytics Server.	OAdmin
Tableau Server Password	The password for the username in the previous value.	#####
Project Name	The project within the One Analytics server that the data sources should be published to. This will overwrite/upgrade any existing version within the project.	Default
Database Username	The SQL Server username to use when the data source connects to the One Analytics data warehouse. This can be any username that has the necessary permissions to access the SQL data warehouse.	SQLUser
Database Password	The password for the database user.	#####
Database Server	The name of the SQL Server database containing the data warehouse.	Sqlserver1942\mssql

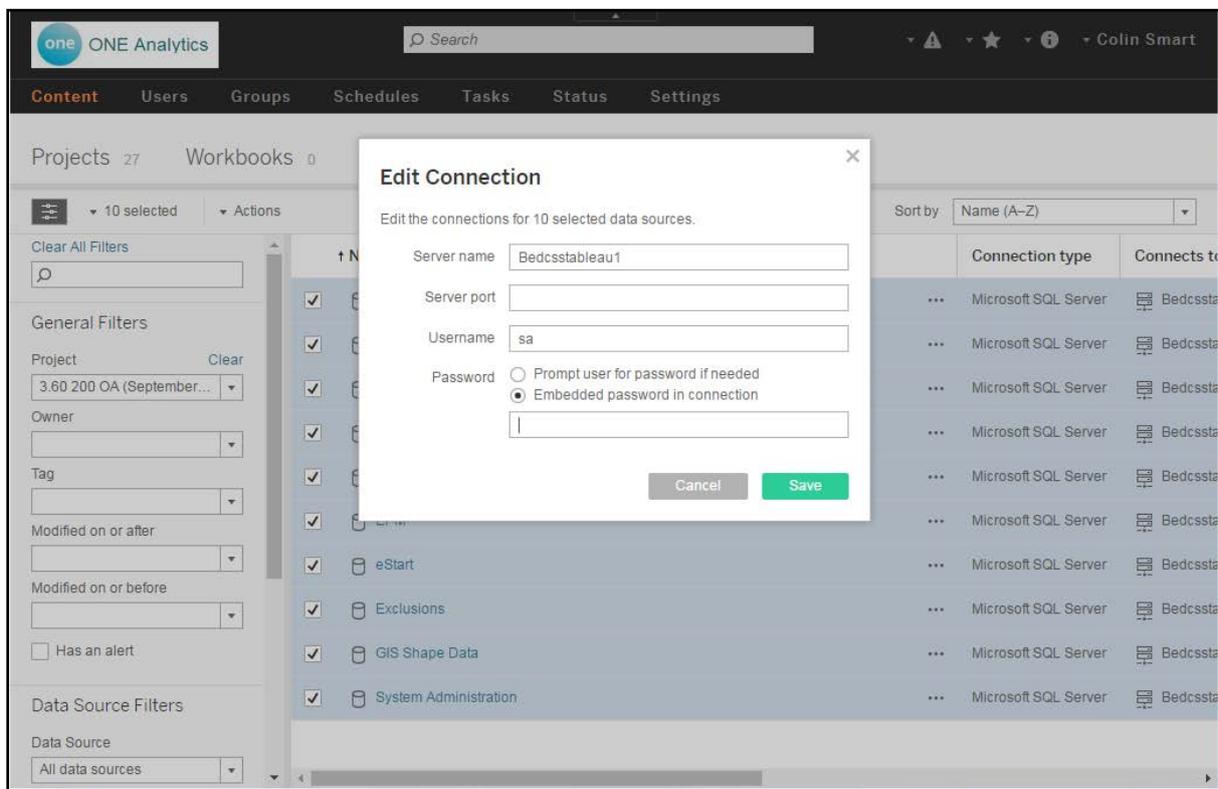
After all details are entered, the utility will publish the latest versions of the One Analytics data sources to your One Analytics server.

After a data source has been published, you can embed the password for the data source so that users do not have to re-enter the password every time they try to connect to the data source. For more information, see [Embedding Passwords](#) on page 25.

Embedding Passwords

The One Analytics Server can embed passwords into data sources. Embedding a password into a data source means that One Analytics users do not need to enter password every time they try to connect to a data source.

1. Log into the One Analytics Server webpage as an administrator.
2. Select **Content | Data Sources** to display a list of available data sources.
3. Locate the data sources you just uploaded and select the check box for each.
4. Select **Actions | Edit Connection** to display the **Edit Connection** dialog.



5. In the **Password** section, select the **Embedded** password option, and enter database password.
6. Click the **Save** button to save the connection credentials into the data sources.

Create Maintenance Plans for One Analytics Server (Optional)

IMPORTANT NOTE: Executing the `ONEAnalyticsServerCleanup.bat` will restart the One Analytics web server software, ending any active user sessions

The One Analytics Server maintains a significant amount of cached data, logs, and audits which will periodically require cleansing. The One Analytics server provides a number of options for

Configuring the One Analytics Server

maintaining these items, and they will be covered in advanced training. However, the recommended approach would be:

1. On the One Analytics release media, copy the ONEAnalyticsServerCleanup.bat file from the Configuration folder to your One Analytics server.
2. Create a Windows scheduled task to execute this batch file on the required schedule.

05 / Installing and Configuring the One Analytics Console

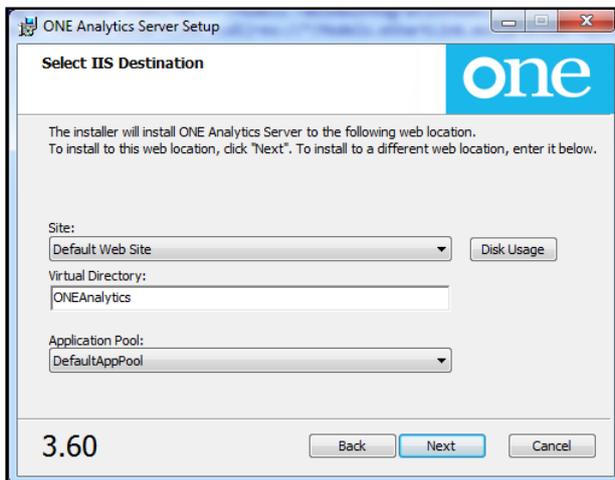
Installing the One Analytics Console

You must install the One Analytics Console into your environment. You can install the console on any server inside your LAN, as long as it can access to the One Analytics Server, SSRS and has IIS installed. You should also create a dedicated application pool in IIS, ensuring it is running in integrated managed pipeline mode and running as the NetworkService identity.

1. On the One Analytics installation media, double click the ONEAnalyticsSetup.msi to display the **One Analytic Server Setup** wizard.



2. Click the **Next** button to display the **Select IIS Destination** page.



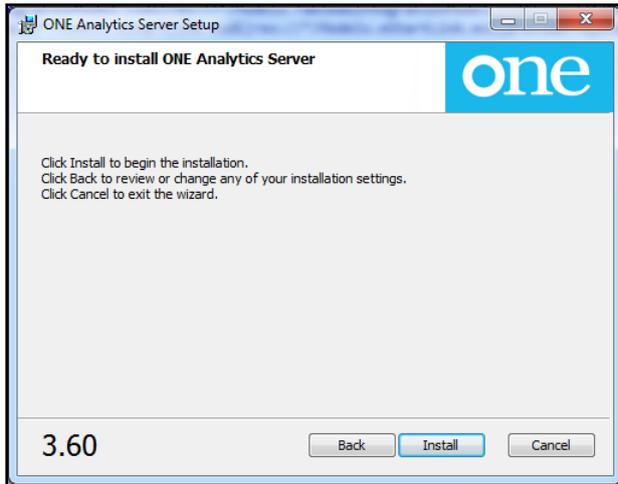
3. Select the options appropriate for your environment.

Site: The IIS site into which you want to install the One Analytics Console web application.

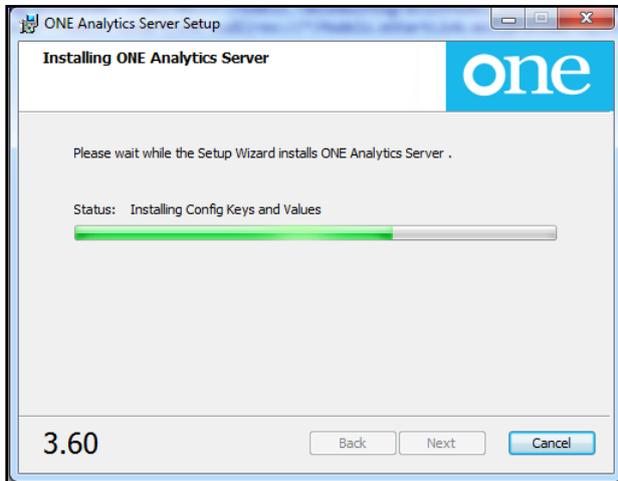
Virtual Directory: The name of the virtual directory that will be created during the installation process. This is typically the name that will be used to reference the site in the browser (e.g. <https://mylocalauthority.com/ONEAnalytics>).

Application Pool: The name of the application pool in which the newly created web application will run. It is recommended that the application runs in its own application pool and is running in integrated managed pipeline mode.

- Click the Next button to display the **Ready to Install ONE Analytics Server** page.



- Click the **Install** button to begin the installation.



The installation will now take place, copying the application files to your IIS instance, and performing all required configuration within IIS.

- Once the installation is complete, click the **Finish** button to close the installation dialog.



Configuring the One Analytics Console

After the installation of the One Analytics console is complete, you must edit the configuration file within the site to connect the site to the One Analytics Server and the One suite.

Locate the web.config file in the root of the website, typically C:\inetpub\wwwroot\ONEAnalytics, and open it in a text editor such as Notepad.

Within this file, search for each of the settings below by name, and enter the value appropriate for your environment.

Config Area	Setting Name	Details	Example
connectionStrings	TableauIntegrationEntities	Connection details to access the Tableau Integration database	Data source=sqlserver\instance; initial catalog=TableauIntegration; user id=sqlUser;password=sqlUserPassword;MultipleActiveResultSets=True;App=EntityFramework
	eStartLinkEntities	Connection details to access the OA Staging database	data source=sqlserver\instance;initial catalog=OneAnalyticsDWStaging; user id=sqlUser;password=sqlUserPassword;MultipleActiveResultSets=True;App=EntityFramework
appSettings	ApplicationServerUrl	The URL to the application server	https://localauthority.com/CCSApplicationServer
	UsingPrimeAuthentication	Set to true if your SSRS environment use Prime Authentication	True or false
system.webServer	customHeaders. Access-Control-Allow-Origin	The URL to the Tableau server	http://myTableauServer:8000
system.serviceModel	endpoint	ReportService2010.asmx of the SSRSServer	https://localauthority.com/ReportServer/ReportService2010.asmx
applicationSettings	TableauServerURL	The URL to the One Analytics (Tableau) server installation	http://myTableauServer:8000
	TableauServerExternalUrl	Set to the Tableau URL that will be accessible to browsers. If using URL rewriting to access the Tableau server then use this URL, otherwise use the same value as for TableauServerURL	http://externallyAccessibleTableauServer:8000
	TableauUsername	The username of the service account to use for connection to the One Analytics (Tableau) server	TableauConsole

Config Area	Setting Name	Details	Example
	TableauSiteName	The site name of the One Analytics (Tableau) Server that will host the OA Console content in the case where multiple sites are used. If only a single site is needed, leave this blank	TestSite
	TableauProjectName	The name of the project within the One Analytics (Tableau) server that will host the content for the OA Console.	OAConsoleReports
	FeedbackApplicationURL	Setting not currently used; leave blank.	
	TableauPassword	The password for the user specified in the TableauUsername setting. The settings should be encrypted – see below.	*****
	SSRSServerURL	The URL to your report server hosting the SSRS content to share via the OA Console	https://localauthority.com/Reports/Pages/Report.aspx?ItemPath=
	SSRSUsername	The username for authentication to the SSRS report server. If the One environment uses PRIME, this should be a One user account. If the One environment does not use PRIME, this should be a Windows user account. The settings should be encrypted. For more information, see Encrypting config values on page 31.	SSRSServiceUser
	SSRSPassword	The password for the username specified in the SSRSUsername setting. The settings should be encrypted. For more information, see Encrypting config values on page 31.	*****

Config Area	Setting Name	Details	Example
	SSRSAppDomain	The domain name for the username specified in the SSRSUsername setting. If you are using a One user account for the SSRSUsername (because your environment uses PRIME), then this value should be blank. The settings should be encrypted. For more information, see Encrypting config values on page 31.	Localauthority.com or blank if using One PRIME.
	SSRSFolderName	The name of the folder on the report server containing the content to make available via the OA Console.	OAReports

Running the Console in HTTP

If the LA is running the console and Tableau in http, which is common when the console is running within the LAN, the **requireSSL** values must be set to “false” in the following section of the web.config file:

```
<system.web>
  <trace enabled="true" requestLimit="40" localOnly="true" />
  <compilation debug="true" targetFramework="4.5" />
  <httpRuntime targetFramework="4.5" />
  <customErrors mode="RemoteOnly" defaultRedirect="Error.html" />
  <authentication mode="Forms">
    <forms loginUrl="~/Account/Login" timeout="2880" protection="All"
requireSSL="false" />
  </authentication>
  <httpCookies httpOnlyCookies="true" requireSSL="false" />
```

The **requireSSL** values should only be set to “true”, when the console is being run within https.

Encrypting config values

To enhance security, you must encrypt the following values within the One Console configuration file:

- TableauPassword
- SSRSUsername
- SSRSPassword
- SSRSAppDomain

Each value should be encrypted individually and placed back into the web.config file, replacing the unencrypted values.

Installing and Configuring the One Analytics Console

The encryption tool, CCSEncryptionTool.exe, is available in the Configuration folder of the One Analytics release media.

1. Open command prompt and change the directory to the One Analytics install configuration folder.
2. Enter the following command in the command prompt, replacing the value to encrypt and MACHINENAME as appropriate.

IMPORTANT NOTE: The MACHINENAME must be in all CAPS and is the name of the machine that is hosting SSRS.

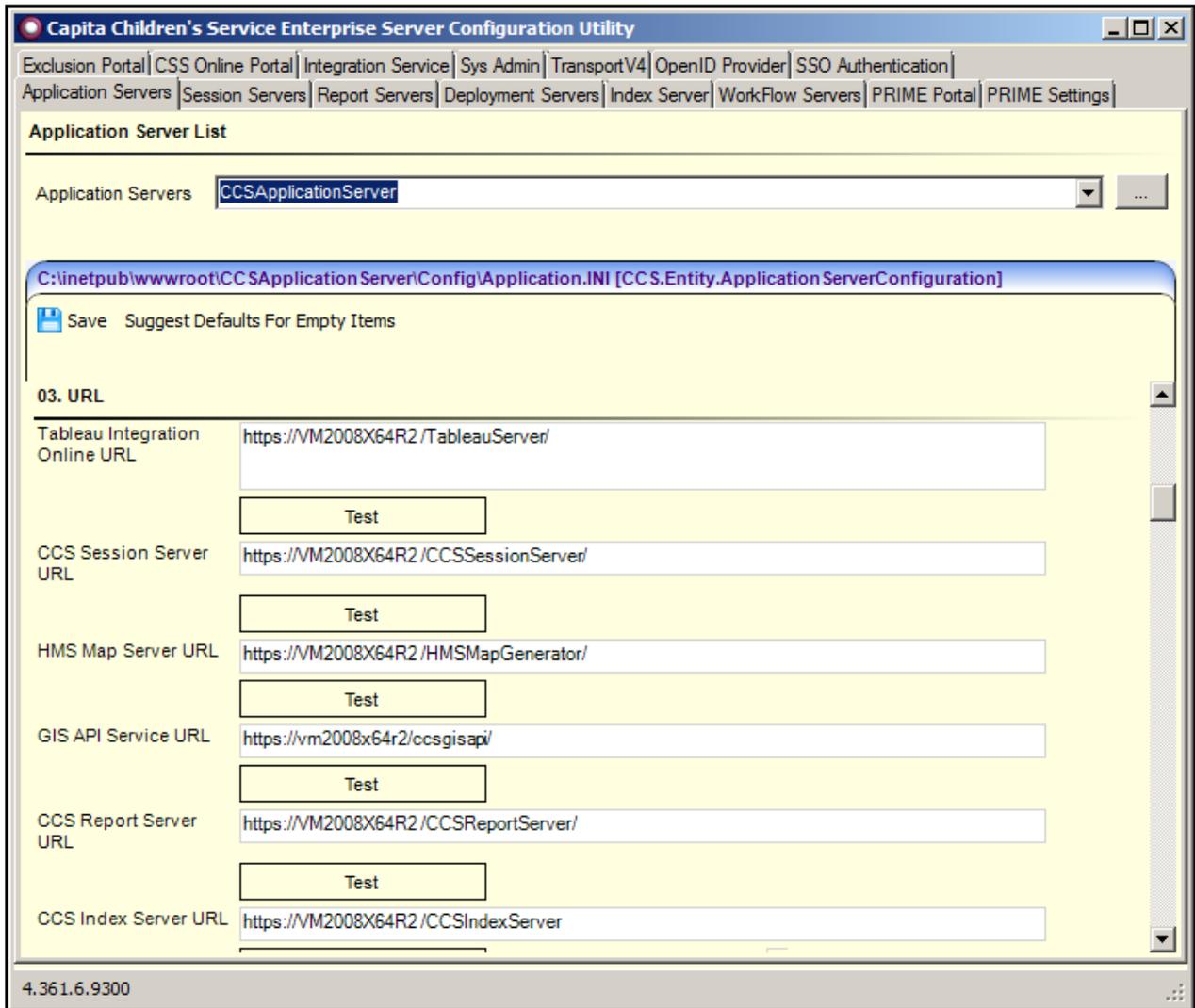
```
D:\...\bin\Debug>CCSEncryptionTool.exe valuetoencrypt MACHINENAME
```

Linking v4 Online to the One Analytics console

In order to link the One Analytics lozenge in v4 Online to the One Analytics console, the One Analytics console address must be entered into the **Tableau Integration Online URL** field in the CCS Server Configuration Utility.

To update the One environment to link to the One Analytics console, complete the following:

1. On the Application server, run the CCSServerConfig.exe from the C:\inetpub\wwwroot\CCSEnterpriseApplicationService_LIVE\Config folder.
2. Select the **Application Server** tab, and select the required application server from the drop-down.
3. Navigate to the **URL Settings** section.
4. Enter your One Analytics Console site URL into the **Tableau Integration Online URL** field.



5. Click the **Save** button.

06 / Installing One Analytics Import Tool

Installing One Analytics Import Tool

There is no installer for the One Analytics Import Tool, simply copy the OA Import Tool folder from the release media to wherever you want to run it from. The Import Tool must be installed on a Windows machine. After copying the files, you should use a text editor to edit the following parameters within the One Analytics – Import Tool.exe.config file.

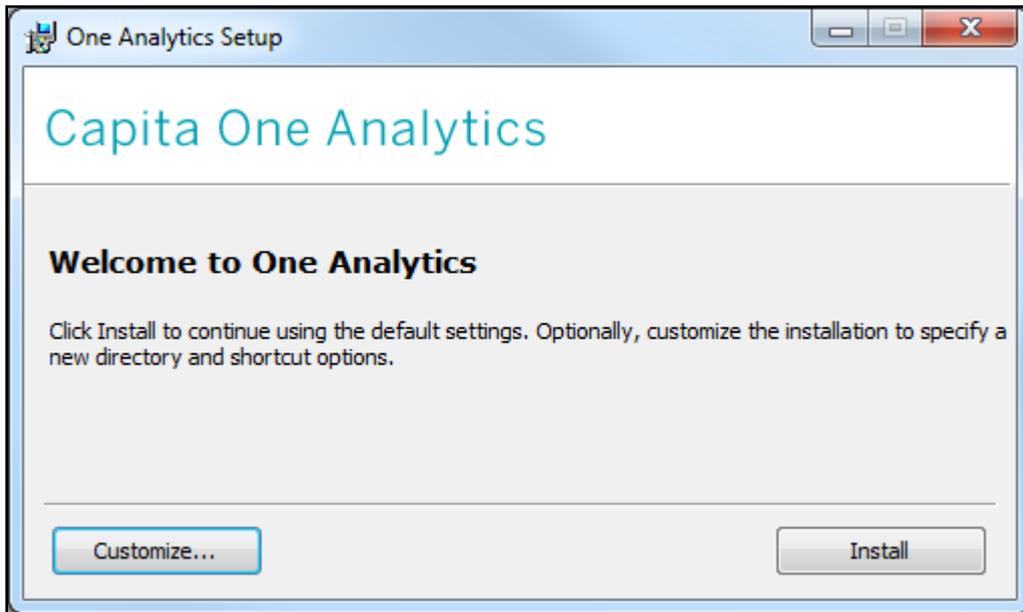
Config Area	Setting Name	Details	Example
connectionStrings	ONEAConnectionString	Connection details to access the data warehouse database	Data Source=sqlserver\OneAnalyticsDW;Initial Catalog=OneAnalyticsDW;Integrated Security=true;Min Pool Size=20; Max Pool Size=500;
appSettings	ApplicationServerUrl	The URL to the Application Server	https://localauthority.com/CCSApplicationServer

IMPORTANT NOTE: The user running the One Analytics - Import Tool.exe must be authorised to access the SQL Server database and have a PULSE license.

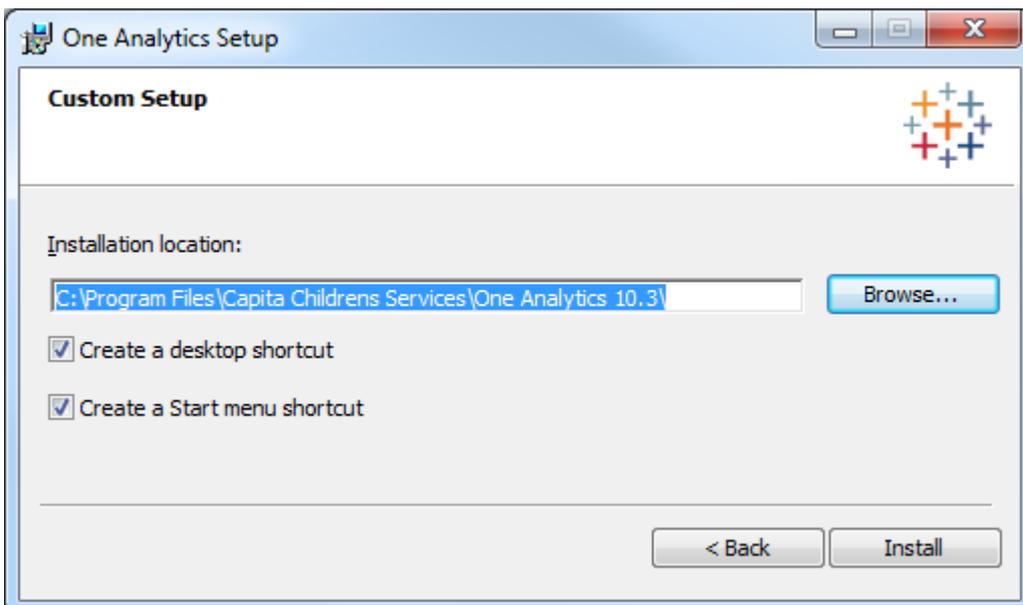
07 / Installing One Analytics Desktop and connecting to published data sources (Power Report Writers Only)

Install One Analytics Desktop

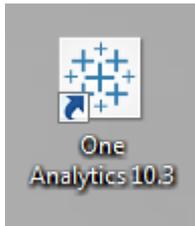
1. From the OA-Tableau-10-3 release media on Solus, run the 64-bit One Analytics Desktop installer.



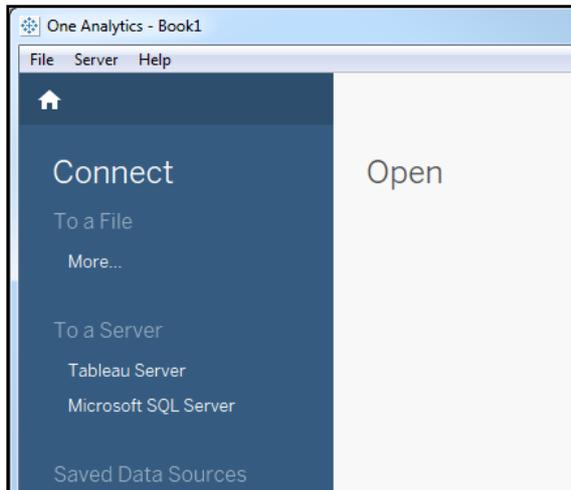
2. If you want to install with the default options, click the **Install** button. Alternatively, click the **Customize** button to display the **Custom Setup** page and change the installation location or change the shortcut options:



After installation, the One Analytics shortcuts should be on your start menu or desktop, depending on the options selected during installation.

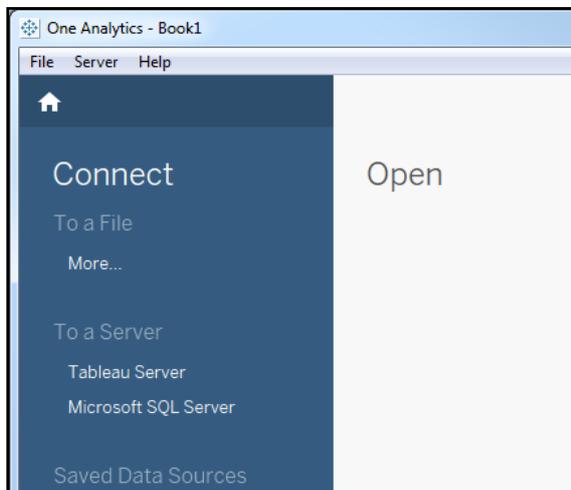


3. Double-click a shortcut to start the software.

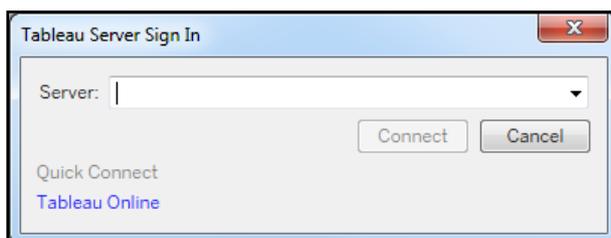


Connecting To Tableau Server

1. Open the One Analytics client.

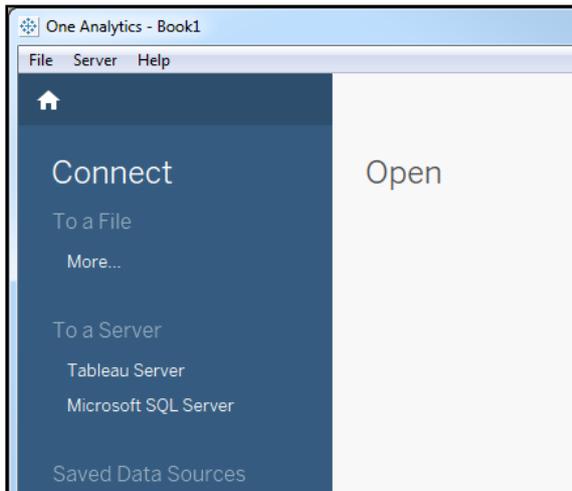


2. Select **Server | Sign In** to display the **Tableau Server Sign In** dialog.

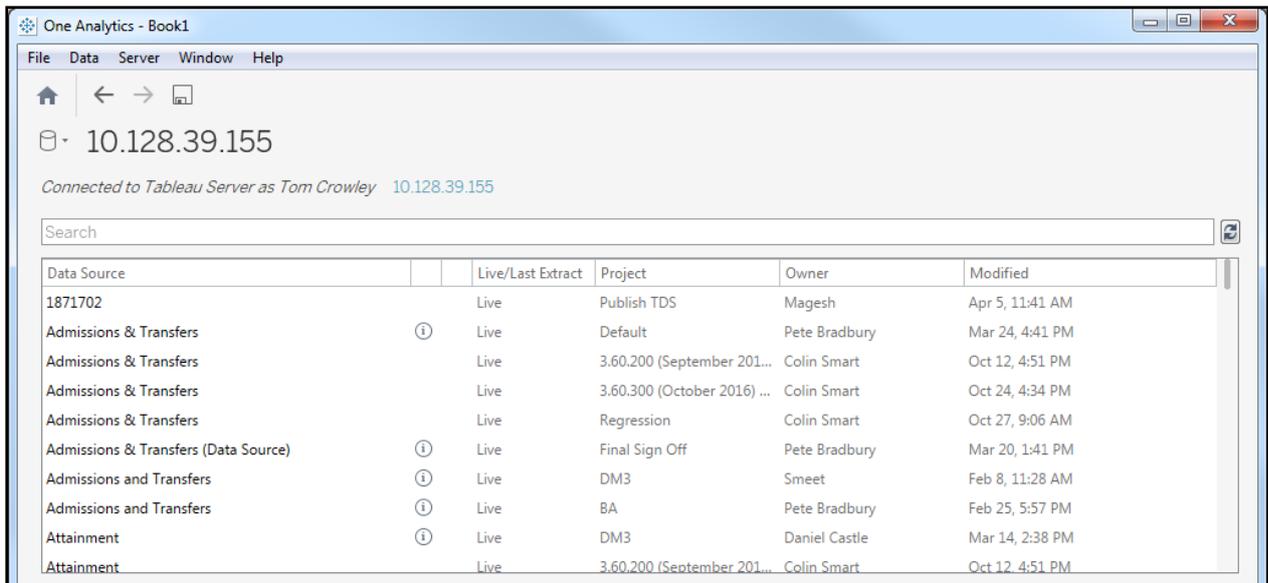


3. Enter your **Server** address. This should be obtained from your server administrator.
4. Enter your **Username** and **Password**. These should have already been supplied. If not, contact your One administrator.

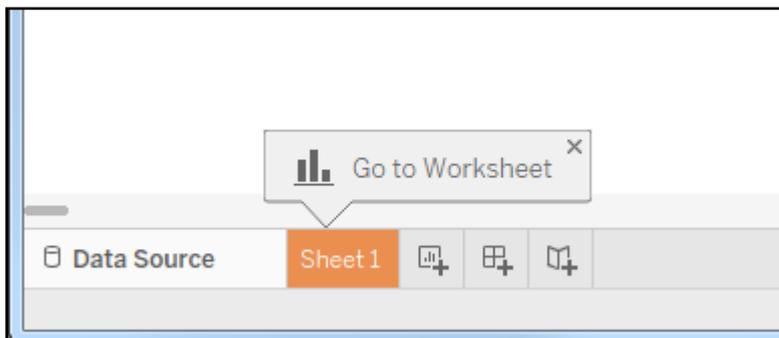
Connect to the One Analytics data source



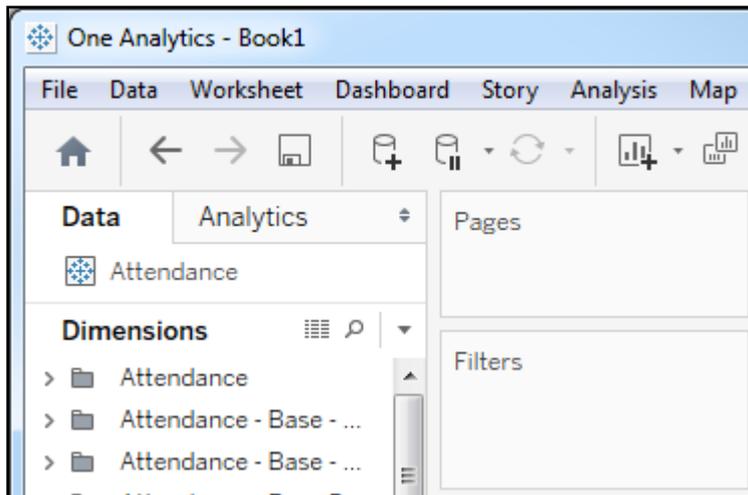
1. On the One Analytics home page in the **Connect** pane, select **Tableau Server** under the **To a Server** menu item



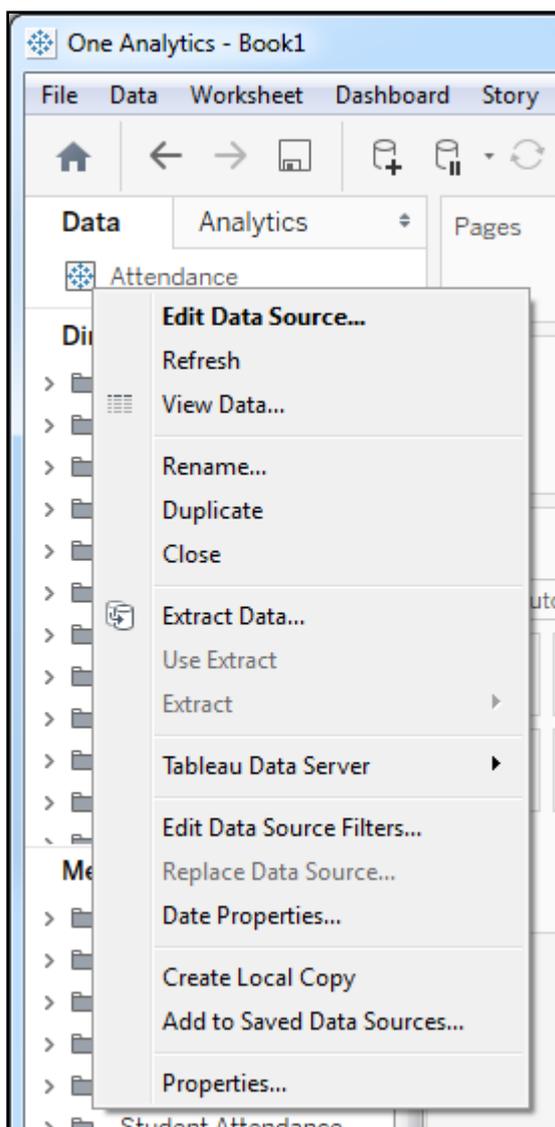
2. Click the name of the data source you wish to connect to. Ensure you connect to the data source in the correct project for the activities you wish to perform.
You are automatically connected to the selected data source, and a new workbook is created.
3. Select Sheet 1 to get started.



The Tableau icon next to the data source indicates that you are connected to an online data source. You should remain connected to the Server version of the data source unless you wish to edit/add fields to that data source.



4. To download the data source to enable local editing, right-click on the data source, and select **Create Local Copy** from the pop-up menu.



08 / Restoring a hosted eStart Database

Introduction

If your LA uses Capita to host their eStart environment, in order to transfer eStart data to One Analytics you must copy the eStart database to a SQL server instance. To copy the eStart database, Capita have provided the SFTPDownloadAndRestore.ps1 in the Configuration folder of the release media. The script should be run daily to ensure that current eStart data is available to One Analytics. The script performs the following tasks:

1. Connects to the ftp server.
2. Looks for a folder with today's date, then dates before it until it finds an eStart database.
3. Downloads the database file.
4. Unpacks the database file.
5. Self-extracts the database file.
6. Restores into the eStart database into the local SQL instance.

Pre-requisites

The server on which you run the script must have SQL Server Management Studio installed and can access the server instance where the database will be restored into.

You must run the script on the machine that hosts the SQL server and you must run the script as a Windows users with authorisation to perform database restores on the on the SQL server.

The supplied script requires the following PowerShell modules to be installed:

Module	Download details
WinSCP	<p>If you have PowerShell 4.0 or later, install WinSCP from the PSGallery over the Internet like this:</p> <pre>Install-Module -Name WinSCP -Verbose</pre> <p>Taken from https://www.powershellgallery.com/packages/WinSCP/5.9.2.5</p>
7-Zip	<p>If you have PowerShell 4.0 or later, install 7Zip4PowerShell from the PSGallery over the Internet like this:</p> <pre>Install-Module -Name 7Zip4PowerShell -Verbose</pre> <p>Taken from https://www.powershellgallery.com/packages/7Zip4Powershell/1.7.1</p>

Parameters

The SFTPDownloadAndRestore.ps1 script requires information on the following parameters:

Parameter	Description	Example
FTPServer	Supplied by Capita – the host of the FTP site.	10.129.4.37

Restoring a hosted eStart Database

Parameter	Description	Example
FTPUsername	Supplied by Capita – the user name to log on to the FTP server.	user-1234
FTPPassword	Supplied by Capita – the password to log on to the FTP server.	Pa55word
SshHostKeyFingerprint	Supplied by Capita – the ssh key to log on to the ftp server.	ssh-rsa 1024 34:1f:33:51:3f:96:72:32:ec:7b:df:f8:e8:0 4:c3:74
FileDownloadLocalPath	Full path of the folder to which you want to downloaded files.	D:\eStartFTPFiles\downloads
ZipFilePassword	Password required to unzip the database download.	egexampleblahblah
SQLDBServer	The name of the SQL server instance that will host the restored database.	myServer\MSSQL2012
SQLDatabase	The name to give the restored database.	hostedeStart

Installation

Copy the STFPDownloadAndRestore.ps1 and FTPDownloadSetting.ini files to a directory on the server, e.g. D:\eStartFTPFiles

Edit the FTPDownloadSetting.ini file, replacing the default values as described in the [Pre-requisites](#) on page 39.

Running the script

You should create a Windows scheduled task to run the STFPDownloadAndRestore.ps1 script every night. The scheduled task should execute the following commands:

```
D:\eStartFTPFiles\SFTPDownloadAndRestore.ps1 -settingsFile  
D:\eStartFTPFiles\FTPDownloadSetting.ini
```

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