

# TIBCO Spotfire® Connectors – Installation Manual

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# TIBCO Spotfire Documentation and Support Services

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All TIBCO documentation is available on the TIBCO Documentation site, which can be found here:

<https://docs.tibco.com>

## Product-Specific Documentation

The following documents for this product can be found in the TIBCO Documentation Library:

- *TIBCO Spotfire® Connectors – User’s Guide*
- *TIBCO Spotfire® Connectors – Installation Manual*
- *TIBCO Spotfire® Connectors License Agreement*
- *TIBCO Spotfire® Connectors Release Notes*

## How to Contact TIBCO Support

For comments or problems with this manual or the software it addresses, contact TIBCO Support as follows:

- For an overview of TIBCO Support, and information about getting started with TIBCO Support, visit this site:

<http://www.tibco.com/services/support>

- If you already have a valid maintenance or support contract, visit this site:

<https://support.tibco.com>

Entry to this site requires a user name and password. If you do not have a user name, you can request one.

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<http://www.tibcommunity.com>

# Introduction

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With TIBCO Spotfire® Connectors, users can connect to and analyze data from a variety of data sources in Spotfire.

Use this document to install and configure the product.

## Connectors in this Version

The following connectors are available in this version of TIBCO Spotfire Connectors:

- Amazon Redshift
- Cisco Information Server
- Cloudera Hive
- Cloudera Impala
- Hortonworks
- HP Vertica
- IBM DB2
- IBM Netezza
- Microsoft SQL Server
- Microsoft SQL Server Analysis Services
- OData
- Oracle
- Oracle Essbase
- Oracle MySQL
- Pivotal Greenplum
- Pivotal HAWQ
- PostgreSQL
- SAP BW
- SAP HANA
- Teradata
- Teradata Aster



Once the installation described in this manual is finished, you need to make sure that each computer that will use a connector also has the required data source driver installed. See [http://support.spotfire.com/sr\\_spotfire\\_dataconnectors.asp](http://support.spotfire.com/sr_spotfire_dataconnectors.asp) for details.

## Prerequisites

The following prerequisites must be met before you start the installation:

- You must be a TIBCO Spotfire Administrator to be able to perform the installation.
- You must have a working installation of TIBCO Spotfire®. See <http://support.spotfire.com/sr.asp> for the required version.

- You must have access to a running TIBCO Spotfire Server that Spotfire can connect to. (Installing a TIBCO Spotfire Server is described in the *TIBCO Spotfire Server Installation and Configuration Manual*.)
- After the installation you need to make sure that each client computer or Spotfire Web Player server to run a connector also has access to the corresponding data source driver, as described in the system requirements. See [http://support.spotfire.com/sr\\_spotfire\\_dataconnectors.asp](http://support.spotfire.com/sr_spotfire_dataconnectors.asp).

# Installing TIBCO Spotfire Connectors

As Spotfire Administrator, you must perform a number of steps to set up TIBCO Spotfire® Connectors. The first step is unzipping the package and reviewing the documentation.

## Procedure

- Unzip the downloaded TIBCO Spotfire® Connectors package, `TIB_spc_4.0.0_win.zip`, to a folder on your local disk.

The zip archive includes this PDF document, release notes, and the deployment file `Spotfire.Connectors.sdn`.

## Deploying the TIBCO Spotfire Connector SDN File to a Server

Use the Spotfire Server Administration Console to deploy the SDN file.

### Procedure

1. Open the Administration Console located at `http://spotserver:port/spotfire/` (where `spotserver` is the name of a Spotfire Server and `port` is the port number, if other than the default) in a web browser.
2. Log in as a Spotfire Administrator.
3. Select the **Deployment** tab.
4. In **Deployment areas**, select the **Deployment Area Name**, which specifies where to deploy the connector packages.



For more information about deployment areas, see the *TIBCO Spotfire Deployment and Administration Manual*.

5. To the right of the Software packages area, click **Add**.  
Response: The Add to Deployment dialog is displayed.
6. Click **Browse**, and then browse to the file `Spotfire.Connectors.sdn`.
7. Click **Open**, and then click **OK** in the Add to Deployment dialog to upload and add the file to the distribution.

Response: The list of software packages is updated with the contents of the file.



All the connectors in the TIBCO Spotfire Connectors product are added initially, but you can exclude any connector that you do not want to deploy. Just select the connector in the Software packages area, and click the **Remove** button to the right. Make sure you remove all software packages corresponding to the connector you do not want to deploy.

8. Click **Validate** to ensure the deployment is consistent with the current version.
9. Click **Save** to save and publish the deployment.  
Response: The Save Deployment dialog is displayed.
10. Type a version number and a description for the deployment and click **OK**.



For more information, see the online help for the Administration Console.

## Updating Clients with the Connector Packages

When the SDN file has been deployed to the Spotfire Server, you must perform a couple of additional steps to update the Spotfire clients. These steps must be performed on all computers running Spotfire.



As a Spotfire Server Administrator with responsibility to upgrade a Spotfire Automation Services server, you must perform these steps to obtain the DLLs that must be copied to the Spotfire Automation Services server.

### Procedure

1. If you are logged into Spotfire, exit Spotfire.
2. Restart Spotfire and log in as usual to the server and the deployment area where you deployed the connector packages. Spotfire will notify you that new packages are deployed on the server and that an update is available. Accept the updates to download and install the new packages by clicking **Update Now**.

## Updating TIBCO Spotfire Web Player

To make the TIBCO Spotfire® Connectors product work on a Spotfire Web Player server, you must update the configuration with information about the connectors you want to use.

### Procedure

1. Install the required drivers for all the connectors of interest, as described in the system requirements at <http://support.spotfire.com/sr.asp>.



For Oracle Essbase, you must also give the server access to the Essbase Client C API, and create environment variables to access the API. Follow separate instructions in [Installing Oracle EssbaseClient on Client computers](#).

2. Locate the `web.config` file in the `webroot` folder on the Web Player server.  
For example, `C:\Program Files\TIBCO\Spotfire Web Player\[version number]\webroot`.
3. Open the `web.config` file, and find the section `<Spotfire.Dxp.Data.Access.Adapters.Settings>`.



4. If the connectors of interest are not available in the <value><adapters> subsection, add the following lines of code in that subsection:

```
<adapters>
  <adapter name="Spotfire.CompositeAdapter" mode="Prompt" />
  <adapter name="Spotfire.ClouderaHiveAdapter" mode="Prompt" />
  <adapter name="Spotfire.ImpalaAdapter" mode="Prompt" />
  <adapter name="Spotfire.HortonworksAdapter" mode="Prompt" />
  <adapter name="Spotfire.VerticaAdapter" mode="Prompt" />
  <adapter name="Spotfire.DB2Adapter" mode="Prompt" />
  <adapter name="Spotfire.NetezzaAdapter" mode="Prompt" />
  <adapter name="Spotfire.SqlServerAdapter" mode="Prompt" />
  <adapter name="Spotfire.SsasAdapter" mode="Prompt" />
  <adapter name="Spotfire.ODataAdapter" mode="Prompt" />
  <adapter name="Spotfire.OracleAdapter" mode="Prompt" />
  <adapter name="Spotfire.EssbaseAdapter" mode="Prompt" />
  <adapter name="Spotfire.MySqlAdapter" mode="Prompt" />
  <adapter name="Spotfire.GreenplumAdapter" mode="Prompt" />
  <adapter name="Spotfire.PivotalHdAdapter" mode="Prompt" />
  <adapter name="Spotfire.PostgreSqlAdapter" mode="Prompt" />
  <adapter name="Spotfire.RedshiftAdapter" mode="Prompt" />
  <adapter name="Spotfire.SapBwAdapter" mode="Prompt" />
  <adapter name="Spotfire.HanaAdapter" mode="Prompt" />
  <adapter name="Spotfire.TeradataAdapter" mode="Prompt" />
  <adapter name="Spotfire.TeradataAsterAdapter" mode="Prompt" />
</adapters>
```



If you do not want all of the connectors above to be available on the Web Player server, simply remove the entire line of code corresponding to the connector you want to make unavailable.

5. Go through the inserted code and make sure each connector is set up with the authentication mode that should be used when logging in to the data source. You can select one of the following authentication modes: mode="Prompt", mode="WebConfig", mode="Kerberos", or mode="ServiceAccount". See TIBCO Spotfire® Web Player Installation and Configuration Manual to learn more about the available authentication types.



All authentication alternatives are not available for all connectors. For information on which authentication alternatives are available for a specific connector, see the help section for that connector in TIBCO Spotfire Connectors User's Guide.



For those connectors that have been configured for anonymous authentication (for example Cloudera Hive, Cloudera Impala, Hortonworks, and OData), the correct authentication mode to use is ServiceAccount.

6. Restart the computer to ensure that IIS picks up the new system variables.

### What to do next

Run the webupdate.bat tool to upgrade the Spotfire Web Player server with the new packages, as described in the *TIBCO Spotfire Web Player Installation and Configuration Manual*.

## Updating TIBCO Spotfire Automation Services

To make the TIBCO Spotfire® connector work on a Spotfire Automation Services server, you must perform the following:

### Procedure

1. Install the required drivers for all the connectors of interest, as described in the system requirements at <http://support.spotfire.com/sr.asp>.



For Oracle Essbase, you must give the server access to the EssbaseClient C API, and create environment variables to access the API. Follow separate instructions in [Installing Oracle EssbaseClient on Client computers](#).

2. Locate and open the file `AddIns.xml` in the `webroot\bin` folder on the Automation Services server. For example, `C:\Program Files\TIBCO\Automation Services\[version number]\webroot\bin`.

3. Find the <AddInRegistry> section, and add the following code:

```
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Impala.ImpalaAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Impala.AddIn"/>
<AddIn
FullTypeName="Spotfire.Dxp.Data.Adapters.ClouderaHive.ClouderaHiveAdapterAddIn,
Spotfire.Dxp.Data.Adapters.ClouderaHive.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Greenplum.GreenplumAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Greenplum.AddIn"/>
<AddIn
FullTypeName="Spotfire.Dxp.Data.Adapters.Hortonworks.HortonworksAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Hortonworks.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Hana.HanaAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Hana.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Essbase.EssbaseAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Essbase.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.SapBw.SapBwAdapterAddIn,
Spotfire.Dxp.Data.Adapters.SapBw.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Vertica.VerticaAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Vertica.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.DB2.DB2AdapterAddIn,
Spotfire.Dxp.Data.Adapters.DB2.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Netezza.NetezzaAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Netezza.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.SqlServer.SqlServerAdapterAddIn,
Spotfire.Dxp.Data.Adapters.SqlServer.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Ssas.SsasAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Ssas.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Oracle.OracleAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Oracle.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.MySql.MySqlAdapterAddIn,
Spotfire.Dxp.Data.Adapters.MySql.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.PivotalHd.PivotalHdAdapterAddIn,
Spotfire.Dxp.Data.Adapters.PivotalHd.AddIn"/>
<AddIn
FullTypeName="Spotfire.Dxp.Data.Adapters.PostgreSql.PostgreSqlAdapterAddIn,
Spotfire.Dxp.Data.Adapters.PostgreSql.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.OData.ODataAdapterAddIn,
Spotfire.Dxp.Data.Adapters.OData.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Redshift.RedshiftAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Redshift.AddIn"/>
<AddIn
FullTypeName="Spotfire.Dxp.Data.Adapters.TeradataAster.TeradataAsterAdapterAddIn,
Spotfire.Dxp.Data.Adapters.TeradataAster.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Teradata.TeradataAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Teradata.AddIn"/>
<AddIn FullTypeName="Spotfire.Dxp.Data.Adapters.Composite.CompositeAdapterAddIn,
Spotfire.Dxp.Data.Adapters.Composite.AddIn"/>
```



If you do not want all of the connectors above to be available on the Automation Services server, simply remove the piece of code corresponding to the connector you want to make unavailable.

4. Restart the computer to ensure that IIS picks up the new system variables.
5. Copy the downloaded connector DLLs/files from the client to the Spotfire Automation Services server. For detailed instructions on how to update Spotfire Automation Services with DLLs, see [Updating Automation Services with DLLs](#).

## Updating Automation Services with DLLs

Before you can use the connector, you must update the Automation Services server with the connector DLLs.

### Prerequisites

Complete the steps in [Updating Clients with the Connector Packages](#).

## Procedure

1. On the client computer, locate the `Modules` folder for your Spotfire installation.

By default, the `Modules` folder includes the hidden attribute. The path is usually one of the following:

- `C:\Program Files\TIBCO\Spotfire\[version number]\Modules`
- `C:\Program Files (x86)\TIBCO\Spotfire\[version number]\Modules`

2. For each connector, locate and open the folder named after the connector.

These folders are created in the `Modules` folder when the client is updated with connector packages.



The name of the folder to open should not include the word `Forms`. The connector folder with `Forms` in the name is used only by the Spotfire Professional Client and not by Spotfire Automation Services.

3. Copy the DLL files from the folder.



For Oracle Essbase, you must also copy the EXE file.

4. Log in to the Automation Services server (either locally or through a remote desktop session).
5. Open the Automation Services `webroot` folder and then open the `bin` folder.

For example, `C:\Program Files\TIBCO\Automation Services\[version number]\webroot\bin`.

6. Paste the copied files into the `webroot\bin` folder.

# Access Rights

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You can specify access rights to the TIBCO Spotfire® Connectors data.


In TIBCO Spotfire®, the access rights to the data from the connector is controlled by the following:

- The data source authentication. (See the Help for your data source for more information.)
- The licenses enabled for the end user groups.

## Assigning the License

The license assignment for the external data source gives access to the corresponding data connection dialog, which is used to fetch data using connectors. Enable or disable the license for groups of users by following these steps.

### Procedure

1. Log into TIBCO Spotfire® as a user with Administration privileges.
2. Select **Tools > Administration Manager**.
3. Click the **Groups and Licenses** tab and select the group for which to enable or disable the license.  
 | Licenses are always assigned to groups, not to individual users.
4. On the **Licenses** tab, click **Edit**.
5. Assign the license by selecting the check box for the **TIBCO Spotfire Connectors** license if you want to make all the connectors available. Alternatively, select only the check boxes corresponding to the ones you want to enable.
6. Repeat [Step 3](#) through [Step 5](#) for all groups that should, or should not, have access to the Connector functionality.

# Access to the TIBCO Spotfire Connectors

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After you have installed and configured the connector, you can set up data connections to the external data in two different ways:

- Add a shared connection to the library, and use it in one or more analyses.
- Add a local connection directly to the analysis.

If the steps in [Updating TIBCO Spotfire Web Player](#) were performed on the Spotfire Web Player server, and an analysis using a connection has been set up, then users of the Spotfire Web Player can connect to the data source directly.

## Adding a Shared Data Connection to the Library

### Procedure

1. Open TIBCO Spotfire.
2. Select **Tools > Manage Data Connections** .
3. Select **Add New > Data Connection**.
4. From the submenu, select the data connection of interest.

### What to do next

The shared data connection can then be used in an analysis by selecting **Add > Connection To > Shared Connection in Library** from the Add Data Tables dialog. See the *TIBCO Spotfire User's Guide* for more information about using the Add Data Tables dialog.

## Adding a Local Data Connection to an Analysis

### Procedure

1. Open TIBCO Spotfire.
2. Click **File > Add Data Tables** .
3. In the Add Data Tables dialog, select one or multiple data sources to be added in a single step.

All the available data connections appear in the **Add** drop-down list.

See the *TIBCO Spotfire User's Guide* for more information about using the Add Data Tables dialog.

# Installing Oracle Essbase Client on Client computers

## Prerequisites

Ensure that you have access to the appropriate Oracle Essbase Client installer and unzip any zipped files on your computer. (For example, `ClientInstallers-11122.zip`.)

For more information about the supported Oracle Essbase versions, see [http://support.spotfire.com/sr\\_spotfire\\_dataconnectors.asp](http://support.spotfire.com/sr_spotfire_dataconnectors.asp).

## Procedure

1. In the extracted archive, locate the `EssbaseClient` directory containing the installation program `EssbaseClient.exe`.
2. Double-click `EssbaseClient.exe`.
3. Select the appropriate language and continue.
4. In the installer pane, click **Next**.
5. Make a note of the destination folder. (You need it for creating the appropriate environment variables.) Click **Next**.
6. In the Custom Setup pane, ensure that both **Essbase Client** and **Essbase Client C API** are selected to be installed before you click **Next**.



The Essbase Client C API is not selected by default. You must select it manually.

7. Click **Install**, and then click **Finish** when the installation is completed.



In the **Installed Programs** list of the Control Panel, you can find a listing for Oracle® Hyperion Essbase Client. Use this entry if you must uninstall Oracle Essbase. Also, remember to remove the created environment variables listed in [Creating Environment Variables](#).

## Creating Environment Variables

You must set up the required environment variables to access the Essbase Client C API.



The environment variables must be exactly as specified, and they must point to the correct paths. Make sure no additional blank spaces are added.

## Procedure

1. Open the **System Properties** of your computer. (On Windows 7 this is reached from **Control Panel** > **All Control Panel Items** > **System**, **Advanced system settings**.)
2. On the **Advanced** tab, click **Environment Variables**.
3. On client computers, under **System variables**, click **New**, and then create the variable `EPMHOME` and set its value to the home path for the Oracle Enterprise Management System. (For example, `C:\oracle\Middleware\EPMSystem11R1`.)

This home path contains the directories `bin`, `bin-32`, `common`, and `products`.



We recommend always using System variables, if possible. For TIBCO Spotfire® Web Player and Spotfire Automation Services servers, the environment variables must be defined as System variables.

4. Create the variable ARBORPATH and set it to the destination folder chosen in the installer. (For example, C:\oracle\Middleware\EPMSys~~tem~~11R1\products\Essbase\EssbaseClient (or %EPMHOME%\products\Essbase\EssbaseClient).)
5. Create the variable ESSBASEPATH and set it to %ARBORPATH%.
6. Add the following to the PATH variable (or create the PATH variable): %ARBORPATH%\bin;%EPMHOME%\bin;