

TIBCO Spotfire® Connectors Installation Manual

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TIBCO Spotfire Documentation and Support Services

Documentation for this and other TIBCO products is available on the TIBCO Documentation site. This site is updated more frequently than any documentation that might be included with the product. To ensure that you are accessing the latest available help topics, please visit:

<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*
- *Working with Cubes in TIBCO Spotfire®*

Related Documentation

The following document related to this product can be found in the TIBCO Documentation Library:

- *TIBCO Spotfire® Server and Environment – Installation and Administration manual*

How to Contact TIBCO Support

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

- 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.

How to Join the TIBCO Spotfire Community

The TIBCO Spotfire Community is an online destination for TIBCO Spotfire customers, partners, and resident experts. It is a place to share and access the collective experience of the TIBCO Spotfire community. The community site offers forums, blogs, and access to a variety of resources. To register, go to the following web address.

<https://community.tibco.com/products/spotfire>

Introduction

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 for use in TIBCO Spotfire Analyst, TIBCO Spotfire Business Author, TIBCO Spotfire Consumer, and/or TIBCO Spotfire Automation Services.

Connectors in this Version

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

- Amazon Redshift
- Apache Spark SQL
- Cisco Information Server
- Cloudera Hive
- Cloudera Impala
- Google Analytics
- 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
- Salesforce.com
- SAP BW
- SAP HANA
- Teradata
- Teradata Aster

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 Spotfire. See <http://support.spotfire.com/sr.asp> for the required version.
- You must have access to a running Spotfire Server that Spotfire can connect to. Installing a Spotfire Server is described in *TIBCO Spotfire Server and Environment* manual and online help.

- Make sure the correct data source drivers have been installed on each client computer, or computer running a Web Player or an Automation Services service, as described in the system requirements. See http://support.spotfire.com/sr_spotfire_dataconnectors.asp.



If you have installed a 32-bit version of the Spotfire client, then you must use the 32-bit version of the data source driver. For Web Player services, always use the 64-bit driver.

Installing TIBCO Spotfire Connectors

As a Spotfire administrator, you must perform a number of steps to make TIBCO Spotfire® Connectors available in Spotfire clients.

Procedure

1. Download and unzip the TIBCO Spotfire® Connectors package, named `TIB_spc_7.6.0_win.zip`, to a folder on your local disk.
The ZIP archive includes this PDF document, release notes, and the deployment file named `Spotfire.Connectors.sdn`.
2. To make connectors available in Spotfire applications, continue by deploying connector packages on a server, see [Deploying Connectors on a Server](#).
3. When the connectors of interest have been deployed on the server, the installed Spotfire clients must download and install the updates, see [Updating Clients with the Connector Packages](#).
4. If connectors should be available for users of web clients or in Automation Services, additional configuration on the server is necessary, see [Configuring Connectors for Use with Web Clients and Automation Services](#).
5. After you have installed the connectors, read more about how to grant Spotfire users access to the connectors in [Access to the Connectors](#).



Make sure the correct data source drivers have also been installed on each client computer, or computer running a Web Player or an Automation Services service, as described in the system requirements. See http://support.spotfire.com/sr_spotfire_dataconnectors.asp.

Deploying Connectors on a Server

To make the connectors available in any Spotfire client, the Connectors SDN file must be deployed on a deployment area on the server. Use the Deployments and Packages page on the server to deploy the SDN file.

Prerequisites

- The Spotfire Server and node manager are up and running.
- A working Spotfire distribution has been deployed to a deployment area on the server. See *Deploying client packages to Spotfire Server* in the *TIBCO Spotfire Server and Environment* online help for more information.
- You have downloaded and saved the `Spotfire.Connectors.sdn` file on your local disk.

Procedure

1. Log in, as a user with administrator rights, to Spotfire Server located at `http://spotsrver:port/spotfire/` (where *spotsrver* is the name of a Spotfire Server and *port* is the port number, if other than the default) in a web browser.
2. Click **Deployments & Packages**.
3. On the Deployments & Packages page, under **Deployment areas**, select the deployment area on which you want to deploy the connectors.



This should be the area where a working Spotfire distribution has already been deployed. For more information about deployment areas, see the *TIBCO Spotfire Server and Environment* online help.

4. On the Software packages pane, click **Add packages**.
5. In the Add packages dialog, click **Choose File**.
6. Browse to, and select the `Spotfire.Connectors.sdn` file, then click **Open**.
7. Click **Upload** in the Add packages dialog to upload and add the file to the distribution.
Response: The list of software packages is updated with the contents of the file.
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 **Save**.
11. Optional: All the connectors in the TIBCO Spotfire Connectors product are added initially, but you can exclude any connectors that you do not want to deploy. Just select the connectors you do not want to deploy 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.

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.

Prerequisites

The connectors of interest have been deployed on the server. See [Deploying Connectors on a Server](#) for instructions.

Procedure

1. If any installed Spotfire clients are open, close them.
2. Restart a Spotfire client, and log in as usual to the server and the deployment area where you deployed the connector packages.
3. Spotfire will notify you that new packages have been deployed on the server, and that an update is available. Click **Update Now** to accept the updates and download and install the new packages. Spotfire opens, and the deployed connectors are available to use, if you have logged in as a user with the sufficient access rights to use installed connectors. See [Assigning the License](#) if you need to change the access rights.

Configuring Connectors for Use with Web Clients and Automation Services

If connectors should be available for users of Spotfire web clients, or in Automation Services, some configuration on the TIBCO Spotfire Server is necessary.

The workflow described below is a suggested workflow, and detailed descriptions for each step are available in separate topics.

Prerequisites

- The Spotfire Server and node manager are up and running.
- Client packages and connectors packages have been deployed to the Spotfire Server. At a minimum, the `Spotfire.Dxp.sdn` file and the `Spotfire.Connectors.sdn` file must be deployed. For instructions, see [Deploying Connectors on a Server](#).

Procedure

1. On the machine that will run the service, install drivers for all the connectors that should be available. See TIBCO Spotfire Connectors System Requirements at http://support.spotfire.com/sr_spotfire_dataconnectors.asp for more information about drivers for the different connectors.
2. Optionally, create a configuration that the service will use, and assign it to the deployment area on which the connectors are deployed. See *Configuring a Web Player service*, or *Configuring Automation Services* in the *TIBCO Spotfire Server and Environment* online help, depending on the type of service you are configuring.



If you need to configure the authentication mode for any of the deployed connectors, this step is required. See [Authentication Modes](#) for more information.

3. Install a service and make sure to select the deployment area where you deployed the connectors. For detailed instructions on installation of services, see *Installing Spotfire Web Player instances*, or *Installing Spotfire Automation Services instances*, in the *TIBCO Spotfire Server and Environment* online help, depending on the type of service you are configuring.



If you created a configuration in the previous step, select that configuration when you install the service.

4. When the service has been installed successfully, test that it is now possible to work with connectors data.

Note that some connectors require additional configuration. See appendix.

Create an analysis in TIBCO Spotfire Analyst, and configure connections with the connectors that should be available in the web clients, then save the analysis to the library. Verify that you can successfully open the analysis in a web client.

Create an Automation Services job with tasks using the connectors that should be available for Automation Services. Verify that you can run the Automation Services job successfully.

Authentication Modes

You might need to change the authentication mode for some connectors that should be available for use with web clients. This is done in the `Spotfire.Dxp.Worker.Host.exe.config` file.

To change the authentication mode for a connector on a Web Player service, you must modify or create a new configuration and assign it to the deployment area on which the connectors are deployed.

Detailed instructions are available in the topic named *Configuring a Web Player service* in the *TIBCO Spotfire Server and Environment* online help, but details specific to the connectors are listed here.

- The configuration file containing the authentication mode settings for the connectors is named `Spotfire.Dxp.Worker.Host.exe.config`, and the authentication mode settings are located in the section `<Spotfire.Dxp.Data.Access.Adapters.Settings>`. To edit this file, you need to export it from Spotfire Server using the `export-service-config` command. See the topic named *Configuring a Web Player service* in *TIBCO Spotfire Server and Environment* online help for instructions.
- The available authentication modes are: `Prompt`, `ServiceAccount`, `Kerberos`, and `WebConfig`. By default, all the connectors use the `Prompt` mode. Read more about the settings in [Configuration File Examples](#).
- See [Connector Names in Configuration File](#) if you are unsure what a certain connector is called in the configuration file.

Configuration File Examples

The available authentication modes Prompt, ServiceAccount, Kerberos, and WebConfig are described here.

By default, all connectors are listed in the configuration file, and all connectors use Prompt as authentication mode, as seen below.

```
<Spotfire.Dxp.Data.Access.Adapters.Settings>
<setting name="WebAuthenticationMode" serializeAs="Xml">
  <value>
    <adapters>
      <adapter name="Spotfire.SqlServerAdapter" mode="Prompt"/>
      <adapter name="Spotfire.TeradataAdapter" mode="Prompt"/>
      <adapter name="Spotfire.OracleAdapter" mode="Prompt"/>
      <adapter name="Spotfire.SsasAdapter" mode="Prompt"/>
      <adapter name="Spotfire.SapBwAdapter" mode="Prompt"/>
      <adapter name="Spotfire.EssbaseAdapter" mode="Prompt"/>
      <adapter name="Spotfire.CompositeAdapter" mode="Prompt"/>
      <adapter name="Spotfire.MySqlAdapter" mode="Prompt"/>
      <adapter name="Spotfire.NetezzaAdapter" mode="Prompt"/>
      <adapter name="Spotfire.PostgreSqlAdapter" mode="Prompt"/>
      <adapter name="Spotfire.VerticaAdapter" mode="Prompt"/>
      <adapter name="Spotfire.TeradataAsterAdapter" mode="Prompt"/>
      <adapter name="Spotfire.HanaAdapter" mode="Prompt"/>
      <adapter name="Spotfire.GreenplumAdapter" mode="Prompt"/>
      <adapter name="Spotfire.ImpalaAdapter" mode="Prompt"/>
      <adapter name="Spotfire.ClouderaHiveAdapter" mode="Prompt"/>
      <adapter name="Spotfire.SparkSqlAdapter" mode="Prompt"/>
      <adapter name="Spotfire.HortonworksAdapter" mode="Prompt"/>
      <adapter name="Spotfire.DB2Adapter" mode="Prompt"/>
      <adapter name="Spotfire.PivotalHdAdapter" mode="Prompt"/>
      <adapter name="Spotfire.ODataAdapter" mode="Prompt"/>
      <adapter name="Spotfire.RedshiftAdapter" mode="Prompt"/>
      <adapter name="Spotfire.SalesforceAdapter" mode="Prompt"/>
      <adapter name="Spotfire.GoogleAnalyticsAdapter" mode="Prompt"/>
    </adapters>
  </value>
</setting>
</Spotfire.Dxp.Data.Access.Adapters.Settings>
```

What effect a certain authentication mode in the configuration file will have for users logging in to a web client depends on what authentication method has been selected for the connection in the analysis. For example, all authentication alternatives are not available for all connectors.

Prompt

Prompt is the default authentication mode, and will allow analyses containing connections to prompt web client users for username and password.

Example: `<adapter name="Spotfire.SparkSqlAdapter" mode="Prompt"/>`

ServiceAccount

ServiceAccount should be used as authentication mode for connectors that have been configured for anonymous authentication (for example Cloudera Hive, Cloudera Impala, Hortonworks, and OData). Web client users who open analyses containing connections will then connect to the external data source using the computer account or dedicated user account that is used to run the node manager.

Example: `<adapter name="Spotfire.ClouderaHiveAdapter" mode="ServiceAccount"/>`

Kerberos

To use Kerberos as authentication method, the Spotfire Server must be configured to use delegated Kerberos. It will only have effect if you have also selected Kerberos as authentication method in the connection login dialog in the analysis. See the *TIBCO Spotfire Server and Environment* online help for more information about Kerberos configuration.

Example: `<adapter name="Spotfire.SqlServerAdapter" mode="Kerberos"/>`

WebConfig

When WebConfig is used as authentication method, all web client users will log in using credentials profiles.

Example: `<adapter name="Spotfire.SparkSqlAdapter" mode="WebConfig"/>`

If this option is selected, then you must also specify the credentials profile to use when logging in. This is done in the `DataAdapterCredentials` settings section in the configuration file, see separate help section about `DataAdapterCredentials` below.

DataAdapterCredentials

If WebConfig has been selected as WebAuthenticationMode, then users will log in with a credentials profile. A credentials profile consists of a profile name, a username, and a password. All users of a credentials profile will then use the same username and password for data source authentication. You can add multiple profiles with different credentials. Each entry should be in this format:

```
<entry profile="profile_name">
  <username>user</username>
  <password>password</password>
</entry>
```

In the example below, two credentials profiles have been added.

```
<Spotfire.Dxp.Web.Properties.Settings>

  <setting name="DataAdapterCredentials" serializeAs="Xml">
    <value>
      <credentials>
        <entry profile="Sales_Dept">
          <username>EMEA\SalesUsers</username>
          <password>MySalesPassword</password>
        </entry>
        <entry profile="Executive">
          <username>EMEA\ExecUsers</username>
          <password>MyExecPassword</password>
        </entry>
      </credentials>
    </value>
  </setting>

</Spotfire.Dxp.Web.Properties.Settings>
```

For integrated security, the username should be in the DOMAIN\user format as in the example with EMEA\SalesUsers and EMEA\ExecUsers. The profile is an arbitrary string.

To use the credentials in an analysis, enter the profile name in the **Credentials** tab of the Data Source Settings dialog in TIBCO Spotfire Analyst. When a credentials profile has been specified both in the configuration file and in an analysis in Spotfire Analyst, it means that the user will not be prompted for username and password to the connection when opening the analysis in the web client. Instead the username and password defined in the credentials profile in the configuration file will be used to log in to the data source when opening the analysis.

Connector Names in Configuration File

This list describes how to refer to the different connectors in the configuration file named `Spotfire.Dxp.Worker.Host.exe.config`.

Official Name	Name in Configuration File
Amazon Redshift	RedshiftAdapter
Apache Spark SQL	SparkSqlAdapter
Cisco Information Server	CompositeAdapter
Cloudera Hive	ClouderaHiveAdapter
Cloudera Impala	ImpalaAdapter

Official Name	Name in Configuration File
Google Analytics	GoogleAnalyticsAdapter
Hortonworks	HortonworksAdapter
HP Vertica	VerticaAdapter
IBM DB2	DB2Adapter
IBM Netezza	NetezzaAdapter
Microsoft SQL Server	SqlServerAdapter
Microsoft SQL Server Analysis Services	SsasAdapter
OData	ODataAdapter
Oracle	OracleAdapter
Oracle Essbase	EssbaseAdapter
Oracle MySQL	MySQLAdapter
Pivotal Greenplum	GreenplumAdapter
Pivotal HAWQ	PivotalHdAdapter
PostgreSQL	PostgreSqlAdapter
Salesforce.com	SalesforceAdapter
SAP BW	SapBwAdapter
SAP HANA	HanaAdapter
Teradata	TeradataAdapter
Teradata Aster	TeradataAsterAdapter

Access to the Connectors

After you have installed and configured the connectors, you need to specify access rights to make them available for users of any Spotfire clients. Data connections can then be created using the installed connectors.

In Spotfire, the access rights to data from connectors are controlled by the following

- The data source authentication. See the official help for the data source of interest for more information. For a short summary of which authentication modes are available for a specific connector, you can view the help section for the connector in the *TIBCO Spotfire Connectors – User’s Guide*.
- The licenses enabled for the end user groups. See [Assigning the License](#) for detailed instructions.

When the access rights have been specified, end users can create data connections to external data in two different ways

- By adding a shared connection to the library, and using it in one or more analyses; see [Adding a Shared Data Connection to the Library](#).
- By adding a local connection directly to the analysis; see [Adding a Local Data Connection to an Analysis](#).

If the steps in [Configuring Connectors for Use with Web Clients and Automation Services](#) were performed on the Web Player service, and an analysis using a connection has been created, then users of Spotfire web clients can connect to the data source directly.

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.

Adding a Shared Data Connection to the Library

By creating a shared connection in the library, the same connection can be used in many different analyses, as well as to create analyses with Spotfire Business Author.

Procedure

1. Open Spotfire Analyst.
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

By creating a connection directly in an analysis, it can be used in that specific analysis only.

Procedure

1. Open Spotfire Analyst.
2. Select **File > Add Data Tables**.
3. Click **Add**.
4. Under **Connection To**, select the data source of interest.

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.

Appendix: Installing Oracle Essbase Client on Client Computers

If you are installing the TIBCO Spotfire Connector for Oracle Essbase, you also need to install Oracle Essbase client on each computer that will run the connector.

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.

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 directory; 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 create 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\EPMSys11R1`.)

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



We recommend always using System variables, if possible. For machines running Web Player services or Automation Services services, 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\EPMSys11R1\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;`

Appendix: Google Analytics-Specific Configuration

To enable the Google Analytics connector for use in web clients, you need to create a new project in your Google Analytics instance to obtain the required ClientID and ClientSecret.

Procedure

1. Log in to <https://console.developers.google.com>.
2. Create a new project.
3. Enable the **Analytics API**.
4. Create credentials.
This will provide you with a client ID and a client secret.
5. Add the following hosts:
 - <http://localhost:55931/authorize/code>
 - <http://localhost:55932/authorize/code>
 - http://<spotfire_server>/spotfire/wp/oauth2/code

Please refer to the online help in the developers console to learn more about how to work with these settings.
6. Log in to Spotfire Analyst as a user with administrator rights.
7. Open **Tools > Administration Manager**.
8. Go to the **Preferences** tab.
9. Click on a group for which you want to enable Google Analytics connectivity.
10. On the **Preferences** tab, expand **Connectors**, and click **GoogleAnalytics**.
11. Click **Edit**.
12. In the **ClientID** field, add the client ID obtained in [Step 4](#).
13. In the **ClientSecret** field, add the client secret obtained in [Step 4](#).
14. In the **LocalRedirectPorts** field, enter 55931, 55932.
15. Click **OK** in the Edit Preferences dialog.
16. Click **Close** in the Administration Manager.
17. For the settings to take effect, users must log out and then log in again.