

ActuateOne™

One Design
One Server
One User Experience

Installing BIRT Spreadsheet Designer

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Understanding the Actuate 11 family of products

ActuateOne™ includes Release 11 of Actuate® Corporation's value-added products for the Eclipse BIRT open source project. ActuateOne institutes a paradigm shift in Business Intelligence technology from individualized tools to a suite of integrated capabilities within a single environment. ActuateOne is one designer, one server, one integrated environment providing a single unified user experience. A common architecture is precisely what today's information-rich global environment requires for development and deployment. This unified Actuate technology continues to enable information management and delivery while supporting advanced security, massive scalability, flexibility through programming, and reuse. ActuateOne realizes our corporate vision of a single user experience by providing extended new analytics capabilities reaching a broader spectrum of users. The new dashboard functionality supports building gadgets to enhance the visual presentation of information. Export to Excel® and other formats integrates Actuate output with other tools on the end-user desktop. Actuate's cloud-ready server supports elastic clustering for dynamic provision of uninterrupted efficient service.

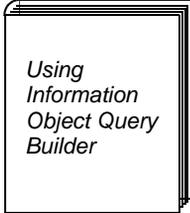
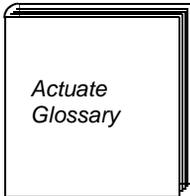
Information, live demos, and endorsements about this release are available from birt-exchange.com and actuate.com. The Actuate site also makes "The Forrester Wave™: Open Source Business Intelligence (BI), Q3 2010" report freely available. The report recognizes Actuate and its value-added offerings for BIRT as a leader in Open Source Business Intelligence.

About BIRT Spreadsheet Designer documentation

The printed and online documentation includes the materials described in Table I-1. You can obtain HTML and PDF files from the BIRT Exchange or Actuate Customer Support site.

Documentation updates are created in response to customer requirements and are available at both sites.

Table I-1 Product documentation

For information about this topic	See the following resource
Installing and configuring BIRT Spreadsheet Designer	 <p><i>Installing BIRT Spreadsheet Designer</i></p>
Late-breaking information and documentation updates	Release notes and updated localization, HTML help, and PDF files posted on birt-exchange.com and Actuate Support
Designing and publishing spreadsheet reports using BIRT Spreadsheet Designer Overview of data access concepts Accessing data from databases, other JDBC data sources, text files, and custom data sources Importing, formatting, and manipulating data Using callback classes and VBA code Adding security features	 <p><i>Designing Spreadsheets using BIRT Spreadsheet Designer</i></p>
Accessing data from Actuate information objects Actuate SQL reference	 <p><i>Using Information Object Query Builder</i></p>
Glossary	 <p><i>Actuate Glossary</i></p>

Obtaining documentation

Actuate provides technical documentation in PDF, HTML, and print formats. Actuate products access HTML-format documentation from the Actuate web site. If you do not have web access or prefer to use documentation hosted on your local system, install the documentation from the Online Documentation and Localization Resource Files ftp package. You can download PDF or view HTML versions of the documentation from birt-exchange.com. If you purchase the product, you can also download documentation using ftp as instructed in the e-mail from Actuate Distribution.

Using PDF documentation

In each book, the table of contents and the index page numbers contain links to the corresponding topics in the text. In the table of contents, you access the link by positioning the pointer over the topic. In the index, you access the link by positioning the pointer over the page number.

The Actuate11\Manuals directory contains a file, master-index.pdx, which is an Adobe Acrobat Catalog utility that can search all the documents in the Actuate Manuals directory. This tool provides a convenient way to find a particular topic in Actuate documentation.

Obtaining late-breaking information and documentation updates

The release notes contain late-breaking news about Actuate products and features. The release notes are available on the Actuate Support site at the following URL:

<http://support.actuate.com/documentation/releasenotes>

Updates to documentation in PDF form are available at the following URL:

<http://support.actuate.com/documentation>

A new user must first register on the site and log in before viewing these pages.

[Birt-exchange.com](http://birt-exchange.com) and actuate.com also provide updated product information. To download updated product documentation, use the following URL:

<http://www.actuate.com/docupdate11sp4/docupdate.html>

Alternatively, after installing Actuate release 11 products, use Start→Programs→Actuate 11→Update Documentation to access this URL.

About obtaining technical support

You can contact customer support by e-mail or telephone. For contact information, go to the following URL:

<http://www.actuate.com/services/support/contact-support/>

About supported and obsolete products

The Actuate Support Lifecycle Policy and Supported Products Matrix are available on the Actuate Support web site. You can access the Support site at the following URL:

<http://support.actuate.com/documentation/spm>

Typographical conventions

Table I-2 describes the typographical conventions in this document.

Table I-2 Typographical conventions

Item	Convention	Example
Code examples	Monospace	Dim Text1 As String
File names	Initial capital letter, except where file names are case-sensitive	Detail.roi
Key combination	A + sign between keys means to press both keys at the same time	Ctrl+Shift
Menu items	Capitalized, no bold	File
Submenu items	Separated from the main menu item with a small arrow	File→New
User input or user response	Monospace	M*16*
User input in XML and Java code	Monospace italics	chkjava.exe <i>cab_name.cab</i>

Syntax conventions

Table I-3 describes the symbols used to present syntax.

Table I-3 Syntax conventions

Symbol	Description	Example
[]	Optional item Array subscript	[Alias<alias name>] matrix[]
{ }	Groups two or more mutually exclusive options or arguments when used with a pipe Defines array contents	{While Until} {0, 1, 2, 3}
	Delimiter of code block Separates mutually exclusive options or arguments in a group	public myClass(){ } Exit {Do For Function Sub}
< >	Java OR operator Argument you must supply Delimiter in XML	int length 4 <expression to format> <xsd:sequence>

Installing and configuring BIRT Spreadsheet Designer

This guide describes how to install Actuate BIRT Spreadsheet Designer Release 11 series. This document also describes how to increase memory allocation for BIRT Spreadsheet Designer.

Installing Actuate BIRT Spreadsheet Designer

You install Actuate BIRT Spreadsheet Designer using the installation wizard. The installation wizard:

- Prompts you to set the install location
- Copies Actuate BIRT Spreadsheet Designer program to the install location
- Creates an icon in the Start menu for Actuate BIRT Spreadsheet Designer

How to install on supported Microsoft Windows systems

To evaluate BIRT Spreadsheet Designer, go to the following location to download the installation executable file: <http://www.birt-exchange.com>

Save the file to your computer. Alternatively, you can run the installation program directly from the BIRT exchange web site. If you are a purchasing customer, you can download BIRT Spreadsheet Designer from an Actuate download site. To install BIRT Spreadsheet Designer, perform the following tasks:

- 1 If you downloaded BIRT Spreadsheet Designer, run the ActuateBIRTSpreadsheetDesigner.exe file. If you have an electronic distribution, run setup.exe in the BIRT Spreadsheet Designer directory. A welcome message appears, as shown in Figure 1-1. Choose Next.



Figure 1-1 Welcome message

- 2 Read and accept the license agreement, as shown in Figure 1-2. Choose Next.

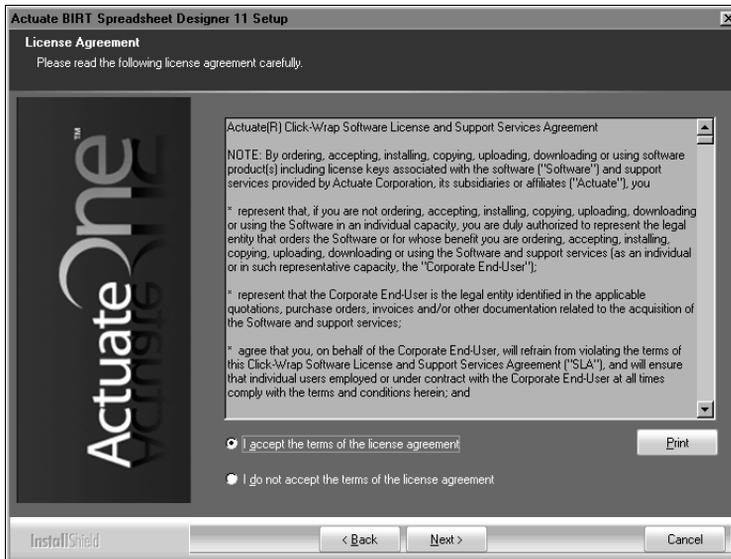


Figure 1-2 Accepting the license agreement

- 3 Accept the default destination folder. Select Typical, then choose Next, as shown in Figure 1-3.

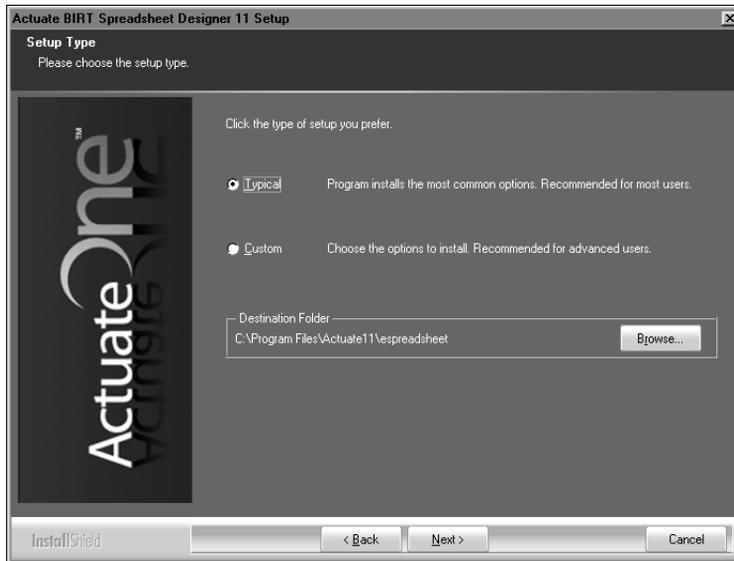


Figure 1-3 Choosing the destination folder in setup type

Alternatively, to install specific features, select Custom, then choose Next, as shown in Figure 1-4.

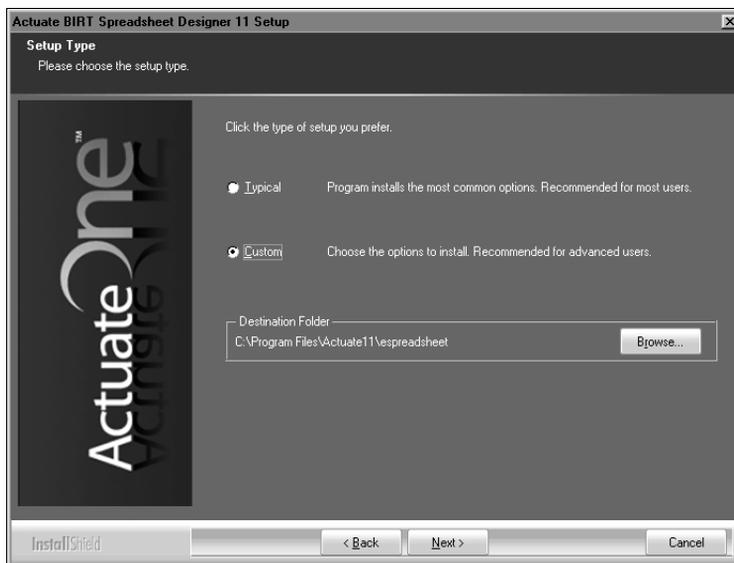


Figure 1-4 Specifying a custom installation

If customizing your installation, select features to install, as shown in Figure 1-5, then choose Next.

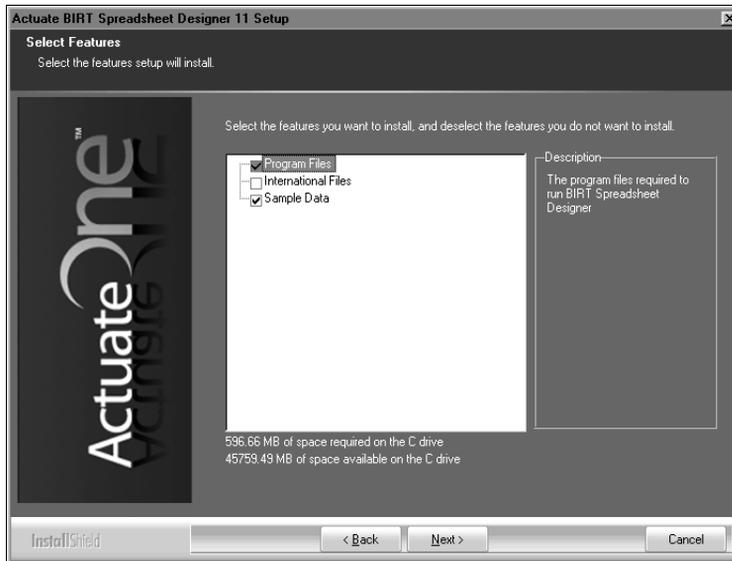


Figure 1-5 Selecting features to install

- 4 In Start Copying Files, review installation settings. To change settings, choose Back. To start copying files, choose Next, as shown in Figure 1-6.

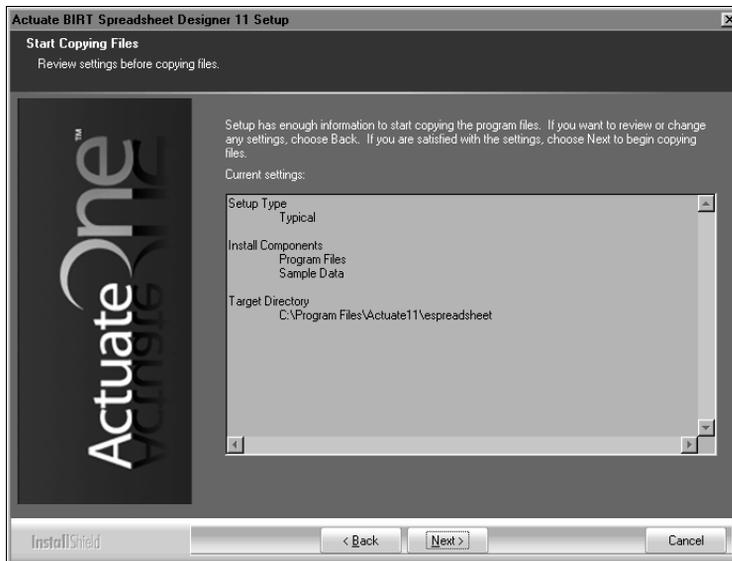


Figure 1-6 Reviewing installation settings

- 5 Setup Status displays the install progress as shown in Figure 1-7. To stop the installation, choose Cancel.

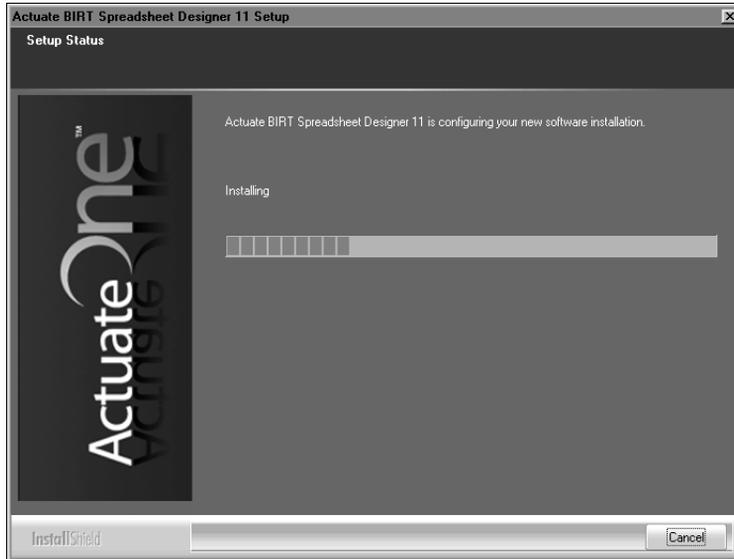


Figure 1-7 Monitoring installation progress

- 6 When installation progress completes, a message that BIRT Spreadsheet Designer installed successfully appears, as shown in Figure 1-8. To prevent the Readme.rtf file from appearing, deselect the Readme option. To exit the installation wizard, choose Finish.

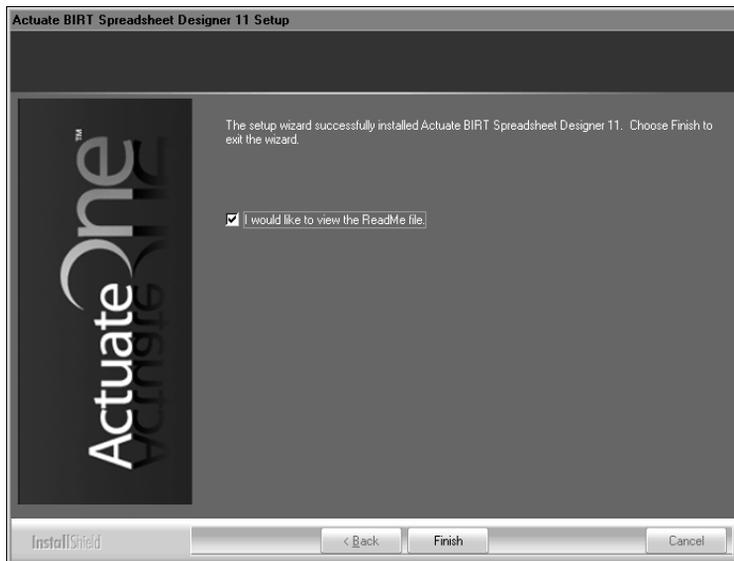


Figure 1-8 Exiting the installation wizard

If you choose Finish without deselecting the Readme file option, the Readme.rtf file appears, as shown in Figure 1-9.

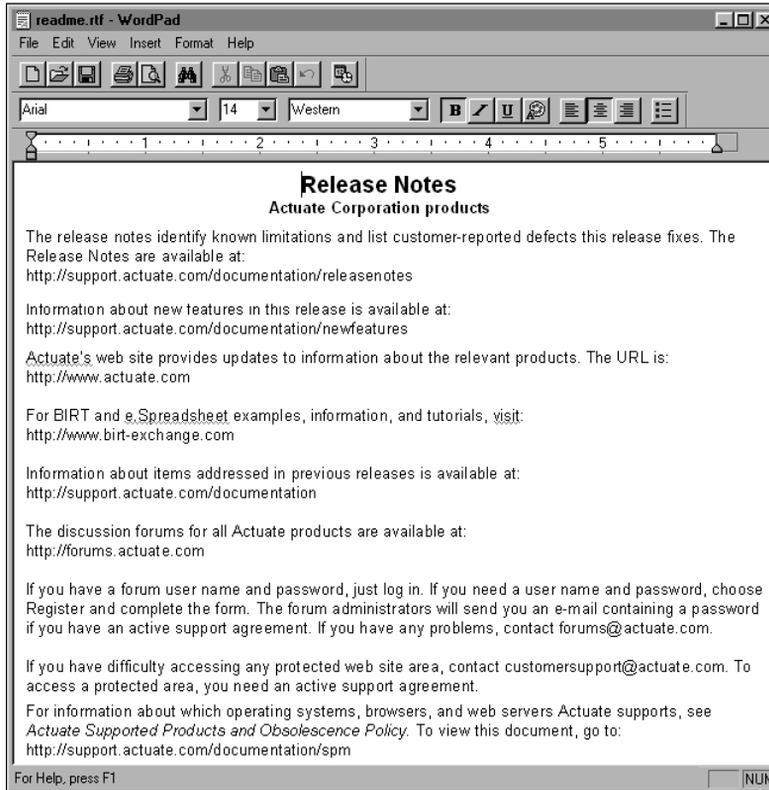


Figure 1-9 Release notes in the readme.rtf file

The installation program installs the BIRT Spreadsheet Designer icon on the Start menu, as shown in Figure 1-10.



Figure 1-10 BIRT Spreadsheet Designer icon

The figures in this procedure show a typical installation of BIRT Spreadsheet Designer on a Windows XP or Vista system in C:\Program Files\Actuate11\espreadsheet.

On a Windows 7 system, you perform a typical installation of BIRT Spreadsheet Designer in C:\Program Files (x86)\Actuate11\espreadsheet. You can choose the custom installation option to install BIRT Spreadsheet Designer in a different location.

How to specify running BIRT Spreadsheet Designer as an administrator on Windows Vista

- 1 In Windows Explorer, navigate to and select the BIRT Spreadsheet Designer executable file. The default installation location for the file is \Program Files\Actuate11\espreadsheet\espreadsheet.exe.
- 2 Right-click the file name, and choose Properties.
- 3 On Properties, choose Compatibility.
- 4 On Compatibility, select Run this program as an administrator. Choose OK.

How to use online documentation on your local system

Actuate products access HTML-format documentation from the Actuate web site. If you do not have web access or prefer to use documentation hosted on your local system, perform these steps.

- 1 Close BIRT Spreadsheet Designer.
- 2 Install the online documentation, including online help and PDF files of the product manuals, using ActuateLocalizationandOnlineDocumentation.exe, which ships with your software, or electronic download package.
- 3 Choose Start→Programs→Actuate 11→Switch Help Location <service pack>.
- 4 In Switch Help Location, select Use local help. Then, choose OK. When you open BIRT Spreadsheet Designer, it accesses online help from the local system.

Starting BIRT Spreadsheet Designer on a Windows 7 system

If you are using BIRT Spreadsheet Designer on a Windows 7 system, to start BIRT Spreadsheet Designer from the Start menu, you must right-click the Start menu item and choose Run as administrator.

To set the executable file to always run as Administrator for every user who uses the PC, log in to Windows 7 as an administrator-level user and perform the following steps.

- 1 Navigate to the \Program Files (x86)\Actuate11\espreadsheet folder.
- 2 Right-click espreadsheet.exe. Choose Properties.
- 3 In espreadsheet.exe Properties, choose Compatibility. In Compatibility, choose Change settings for all users.
- 4 In espreadsheet.exe Properties—Compatibility for all users, select Run this program as an administrator. Choose OK.
- 5 In espreadsheet.exe Properties, choose OK.

Uninstalling BIRT Spreadsheet Designer

To uninstall BIRT Spreadsheet Designer, use Add/Remove Programs.

On a Windows 7 system, select Actuate BIRT Spreadsheet Designer, right-click, then choose Uninstall.

On a Windows XP system, select Actuate BIRT Spreadsheet Designer, then choose Remove, as shown in Figure 1-11.

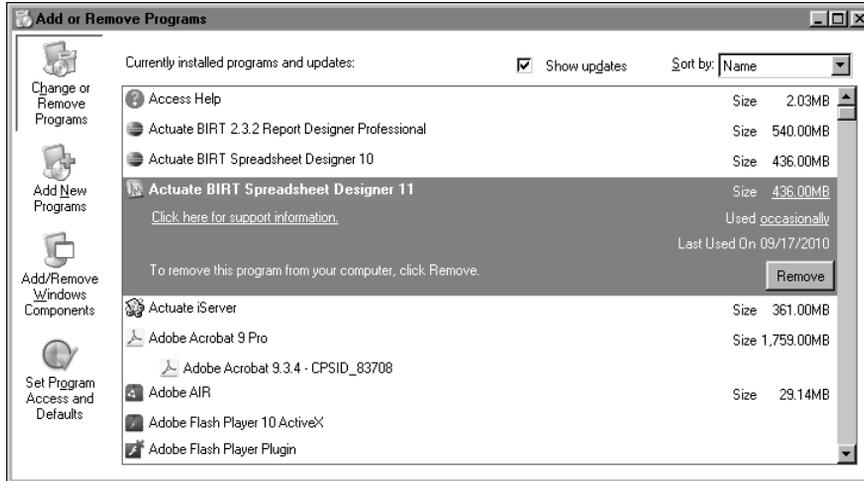


Figure 1-11 Uninstalling BIRT Spreadsheet Designer

Configuring memory usage for BIRT Spreadsheet Designer

If BIRT Spreadsheet Designer displays an out of memory message, BIRT Spreadsheet Designer requires more memory than is currently allocated for the program. If you use a database data source, ensure you perform sorting operations in a database query rather than in the report.

To solve memory allocation issues, increase the maximum allocation to enough memory to run your largest report using BIRT Spreadsheet Designer. If your platform uses virtual memory, the physical memory of the machine does not limit BIRT Spreadsheet Designer's maximum memory allocation.

To increase memory allocation, modify the BIRT Spreadsheet Designer vmoptions file. This file contains important configuration information. Save a backup copy before making any changes to the file.

You can use the `vmoptions` file to change any Java Virtual Machine option. Increasing memory allocation, however, is the most common task for users modifying `eSpreadsheet.vmoptions`. For more information about modifying this file, see *Designing Spreadsheets using BIRT Spreadsheet Designer*.

How to increase memory allocation in the BIRT Spreadsheet Designer configuration file

- 1 In a text editor, open `eSpreadsheet.vmoptions`.
- 2 Add or modify the memory allocation parameter. For example, to set the memory allocation to 512 megabytes, type:
`-Xmx512M`
- 3 Save `eSpreadsheet.vmoptions`.
- 4 Close BIRT Spreadsheet Designer, if necessary.
- 5 To start BIRT Spreadsheet Designer and use the updated values in the `eSpreadsheet.vmoptions` file, choose **Start**→**Programs**→**Actuate 11**→**Actuate BIRT Spreadsheet Designer**.

Configuring Actuate BIRT iServer System for spreadsheet reports

This section provides information about what to do if you experience memory issues when you publish a spreadsheet report. If memory errors persist after you increase the memory allocation pool and turn on incremental garbage collection for BIRT Spreadsheet Designer, you can increase the memory allocation for BIRT Spreadsheet processes on the server.

To increase memory, you must change the `StartArguments` configuration variable in the `acserverconfig.xml` file. This file installs with Actuate BIRT iServer System to the `iServer\etc` directory.

How to increase memory allocation for BIRT Spreadsheet processes on an Actuate BIRT iServer

- 1 In a text editor, open `acserverconfig.xml`.
- 2 Locate the `StartArguments` variable in the `ReportingService` section. Replace the first variable value, type `-Xmx`, followed by the new memory allocation, followed by `M`. For example, to set the memory allocation to 512, type
`-Xmx512M`
- 3 To increase viewing memory, you must also change the value of the `StartArguments` variable in the `ViewingService` section of the file.
- 4 Save `acserverconfig.xml`.

Installing Actuate BIRT Designer Professional to create Information Objects

To create Information Objects for Spreadsheet reports, first install Actuate BIRT Designer Professional. Use the Information Object Design Perspective in BIRT Designer Professional to create information objects and use information object data sources. You install Actuate BIRT Report Designer Professional using the installation wizard. The installation wizard:

- Asks you to accept or decline the license agreement
- Prompts you to set the install location

The default install location for supported Microsoft Windows systems is:

```
C:\Program Files\Actuate<Release family number>\BRDPro
```

where <Release family number> is the first number of the Actuate product suite release number. For example, Actuate BIRT Report Designer Professional Release 11 series uses a directory named Actuate11.

- Installs the Eclipse workbench into BRDPro\eclipse
- Copies Actuate BIRT Report Designer Professional features into BRDPro\eclipse\features
- Copies Actuate BIRT Report Designer Professional plug-ins and JAR files into BRDPro\eclipse\plugins
- Creates an entry in the Start menu for Actuate BIRT Report Designer Professional

The entry is BIRT Report Designer Professional and is under the Actuate <Release family number> group. For example, Actuate BIRT Report Designer Professional Release 11 series is in the Actuate 11 group in the Start menu.

When you install Actuate BIRT Report Designer Professional on Windows Vista, you must perform an additional step manually to set the designer to run as an administrator.

How to install Actuate BIRT Report Designer Professional on Microsoft Windows systems

To evaluate BIRT Designer Professional, go to the following location to download the installation executable file: <http://www.birt-exchange.com>

Save the file to your computer. Alternatively, you can run the installation program directly from the BIRT exchange web site. If you are a purchasing customer, you can download BIRT Designer Professional from an Actuate ftp site.

To install BIRT Designer Professional, perform the following tasks:

- 1 If you downloaded BIRT Designer Professional, run the ActuateBIRTDesignerProfessional.exe file. If you have a ftp distribution, run setup.exe in the \birtdesignerprofessional directory. A welcome message appears, as shown in Figure 1-12. Choose Next.



Figure 1-12 Welcome message

- 2 Read and accept the license agreement, as shown in Figure 1-13. Choose Next.

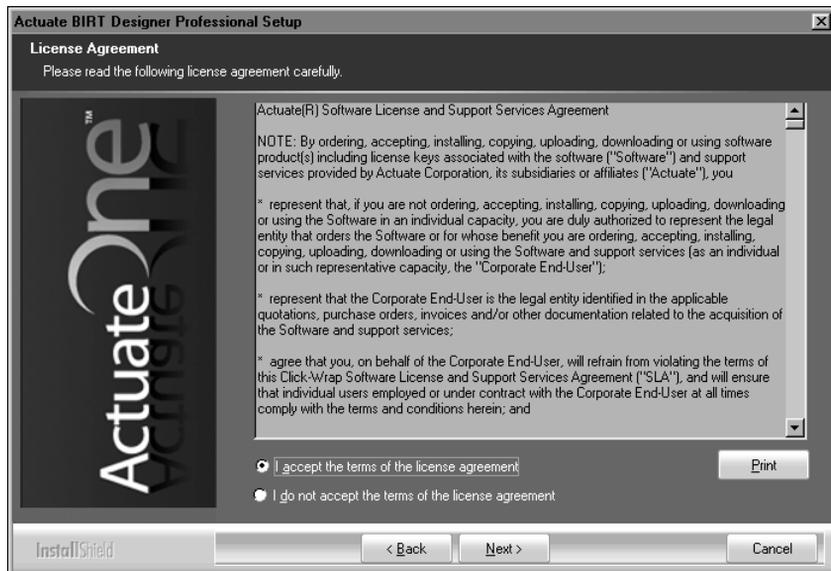


Figure 1-13 License agreement

- 3 Setup prompts to install prerequisite software, as shown in Figure 1-14. Choose Next.



Figure 1-14 Accepting the prerequisite components installation

- 4 Accept the default destination folder, C:\Program Files\Actuate11\BRDPro, as shown in Figure 1-3. Select Typical, then choose Next.



Figure 1-15 Choosing the destination folder in setup type

Alternatively, to install specific features, select Custom, then choose Next, as shown in Figure 1-4.



Figure 1-16 Specifying a custom installation

- 5 Accept the Evaluation License option, as shown in Figure 1-17. Alternatively, select Use the license you have purchased. Browse to that file. Then, choose Next.

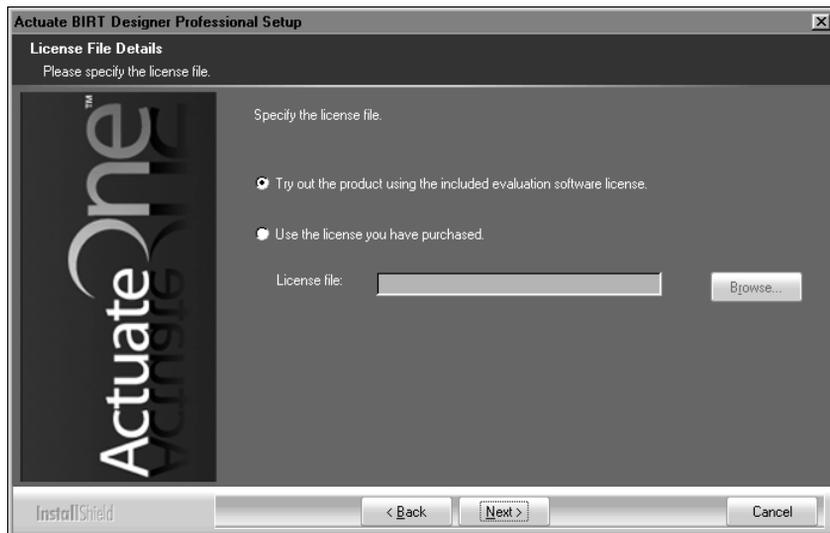


Figure 1-17 Selecting a license option

If customizing your installation, select features to install, as shown in Figure 1-5. Then, choose Next.

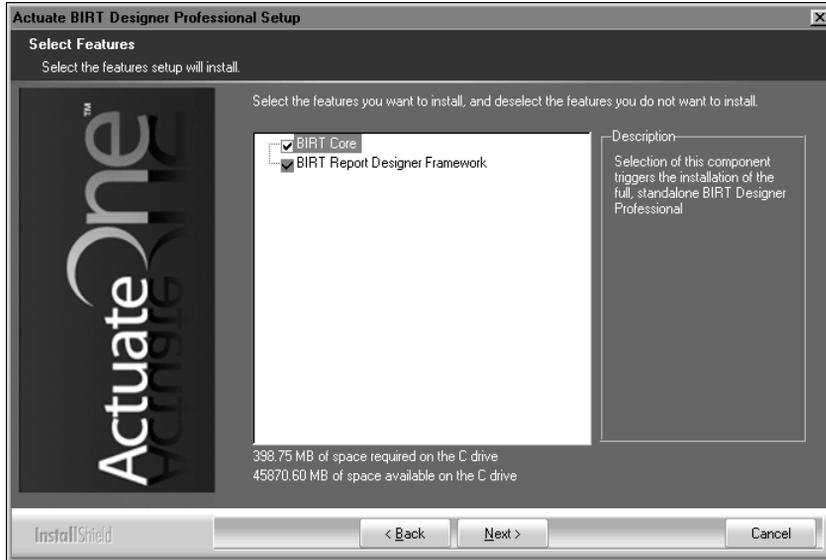


Figure 1-18 Selecting features to install

- 6 In Start Copying Files, review installation settings. To change settings, choose Back. To start copying files, choose Next, as shown in Figure 1-6.



Figure 1-19 Reviewing installation settings

- 7 Setup Status displays the install progress as shown in Figure 1-7. To stop the installation, choose Cancel.

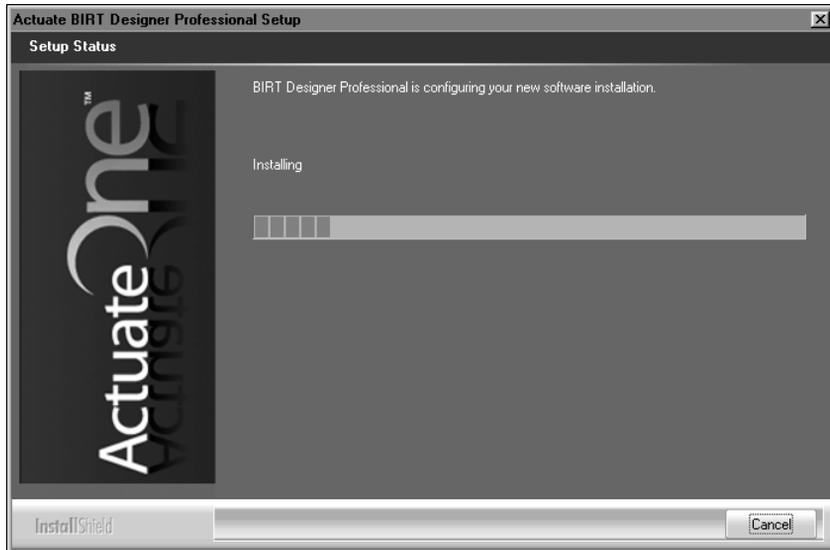


Figure 1-20 Monitoring installation progress

- 8 When installation progress completes, a message that BIRT Designer Professional installed successfully appears, as shown in Figure 1-8. To exit the installation wizard, choose Finish.

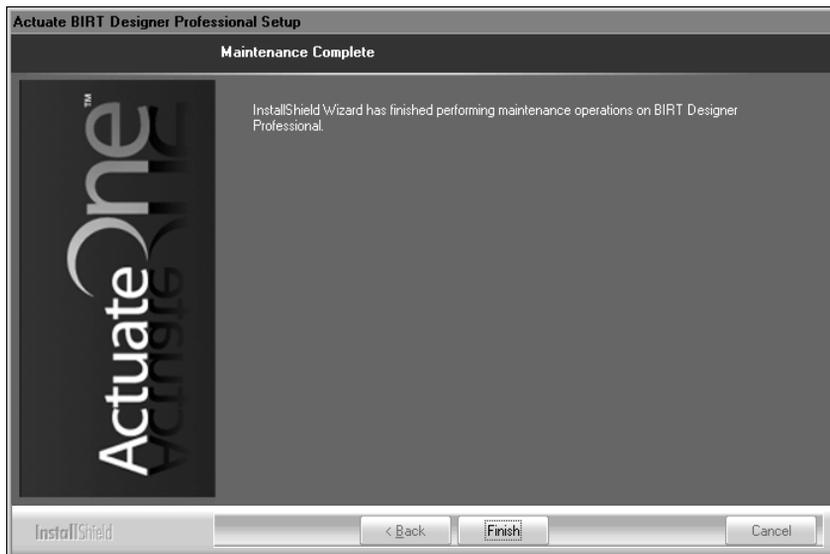


Figure 1-21 Exiting the installation wizard

The installation program installs the BIRT Designer Professional icon on the Start menu, as shown in Figure 1-10.



Figure 1-22 BIRT Designer Professional icon

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