Enterprise

Installation Guide

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ABOUT VEERA

Veera (Visual Engine for Enterprise Reporting and Analysis) is a powerful tool that allows you to turn data into actionable knowledge. Using Veera, you can transform data into workflow processes, create and share jobs with colleagues and simplify data and reporting needs. Having the ability to merge and integrate data from any one or multiple disparate data sources allows for:

- A revolutionary new way of working with data
- Implementing solutions quickly, based on existing architecture
- Getting the right data, at the right time, to make the right decisions
- Streamlining and automating reporting
- Easily finding and tracking errors in current reporting processes
- Trusting results

In short, Veera makes meaningful data highly accessible whenever you need to ask questions of your data.

THIS DOCUMENT

Veera has been developed to work in a number of configurations. This document describes the process for installing, licensing, and updating all components of Veera Enterprise, the client-server version of the product.

SYSTEM REQUIREMENTS

Veera Enterprise requires that the following *minimum* criteria be met on both the client and server platforms prior to the installation:

- Windows 7, or later
- .NET Framework 4.6.1 and its requirements
- 2 GHz 32-bit (x86) or 64-bit (x64) processor
- 3 GB of available system memory
- 20 MB available hard drive space
- 32 MB of graphics memory
- Internet access

VEERA ENTERPRISE OVERVIEW

Veera Enterprise is comprised of two main components – the Veera Enterprise Server and the Veera Client. Though they can be installed on the same computer , they are typically placed on separate machines occupying the same domain of a local area network (LAN).

Veera Enterprise Server

The Veera Server component is the workhorse of an Enterprise installation. This component runs on its host computer as a service rather than an application. This means that , unless intentionally stopped, the Veera Server is invisibly running whenever its computer is.   Multiple Veera Clients can connect to the same Veera Server, as long as it's on the same network domain as they are. The Veera Server is also the keeper of all the data processing "jobs" Veera Client users create, all the data source references/pointers their jobs rely upon, and it performs all of the computations required by these jobs to produce their results. These three characteristics of the Veera Server provide the advantages of a Veera Enterprise installation – easily sharing jobs between users and the ability to schedule jobs to run without the Veera Client component even being on.

Veera Client / Veera Runner Client

Veera Clients are installed directly onto users' computers. They interact with an Enterprise Server, passing the commands it needs to perform all of Veera's actions on their behalf. The Client locally stores several custom settings unique to its user.
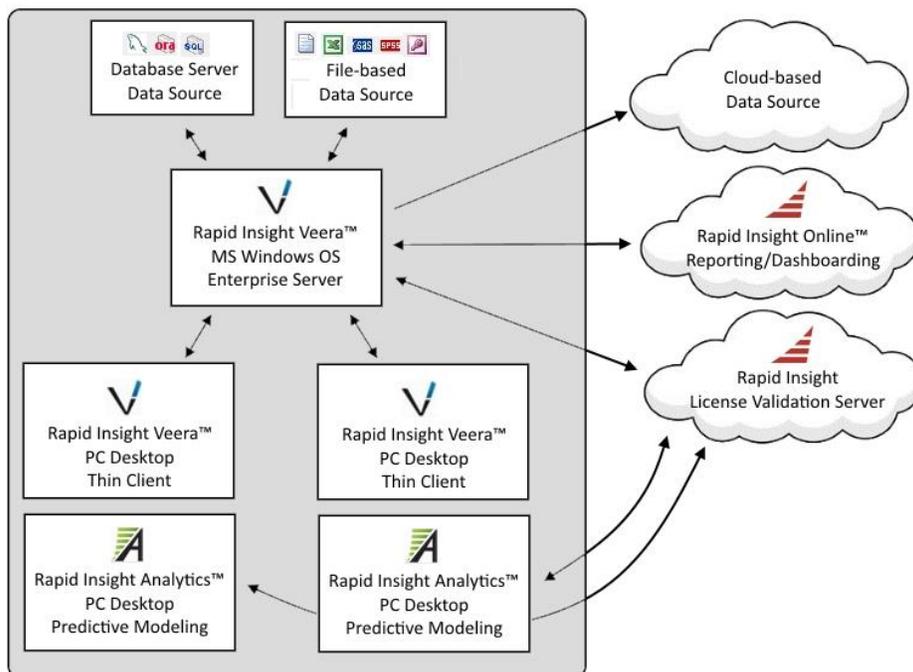

Veera Runner Client is a limited feature version of the Client component. Its purpose is to provide the ability to run jobs on demand but not permit the user to create or edit them. In all other respects, Veera Runner Client is installed and operates like the full featured Veera Client.
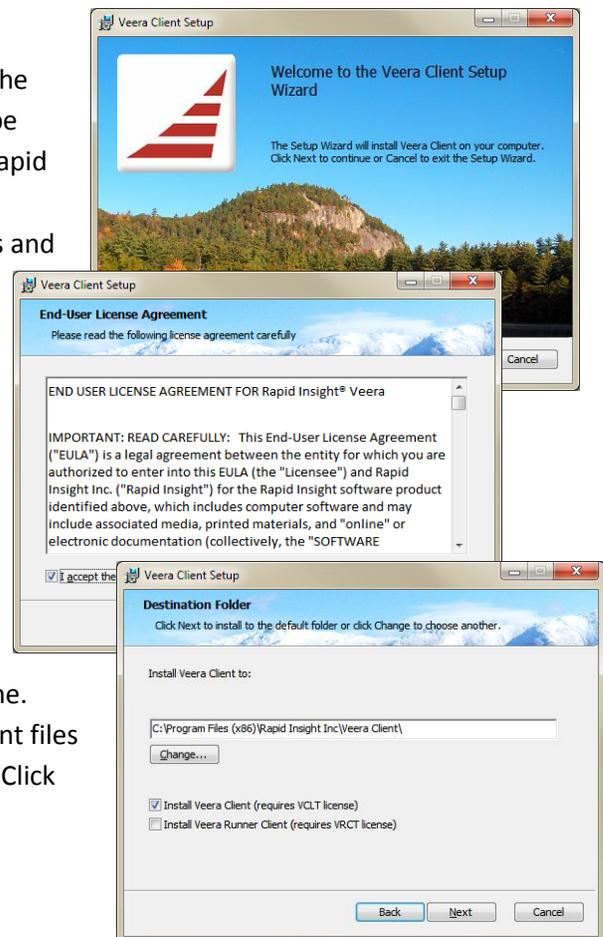
INSTALLING VEERA ENTERPRISE

Veera Server Installation

1. Run the Veera Enterprise installer "VeeraEnterprise.msi" or run the setup program "VeeraEnterpriseWebSetup.exe" (which will check for and install prerequisites before downloading and running the .msi installer file). Click NEXT.
2. Accept the terms and conditions by checking the box, then click NEXT.
3. Enter a new destination path where the server files will be installed, or accept the default path. Click NEXT.
4. Once the program has successfully been installed, a splash screen stating that the installation is complete will appear. Click FINISH.
5. The Veera Server service will be started automatically once the installation is successfully completes
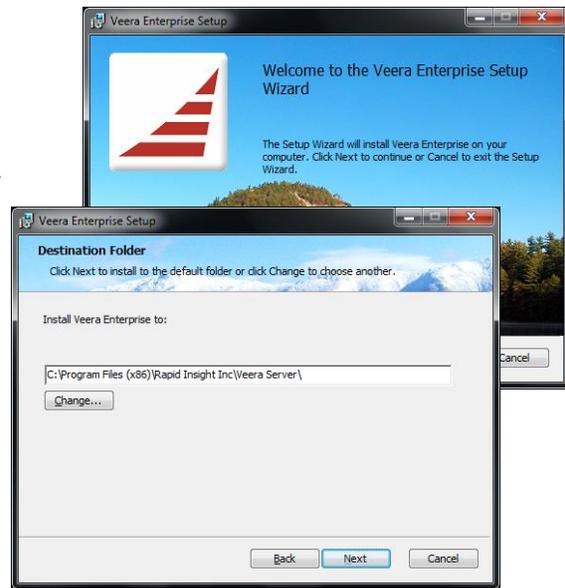
Veera Client / Runner Client Installation

1. Locate the folder labeled "VeeraClient" on the Veera Enterprise Server. This will typically be found as a subfolder to "C:\Program Files\Rapid Insight Inc\Veera Server".
2. Copy the VeeraClient folder and its contents and paste a copy of this onto a computer that will host a Veera Client.
3. Open the VeeraClient folder on the Client host computer and run the installer file "VeeraClient.msi"
4. Click NEXT on the opening splash screen.
6. Accept the terms and conditions by checking the box, then click NEXT.
5. Check the appropriate box to choose whether the installer will install Veera Client or Veera Runner Client on this machine.
7. Enter a new destination path where the client files will be installed, or accept the default path. Click NEXT.
8. Click INSTALL to begin the installation.

9. Once the program has successfully been installed, a splash screen stating that the installation is complete will appear. Click FINISH.

LICENSING AND REGISTERING VEERA ENTERPRISE
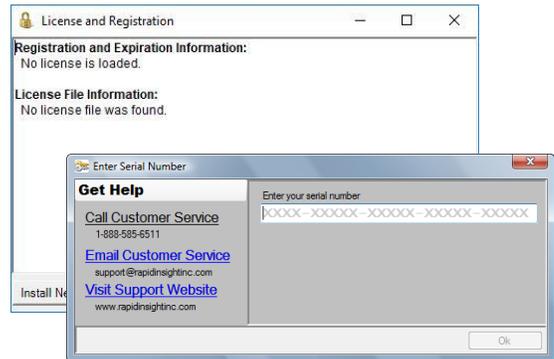
Licensing the Veera Server
Locate the Veera Enterprise Manager in the Windows Program List (under the Rapid Insight Inc > Veera Enterprise menu) and run it to start the licensing and registration process

Licensing a Veera Client or Runner Client
Locate the Veera Client or Veera Runner in the Windows Program List (under the Rapid Insight Inc > Veera menu) and run it to start the licensing and registration process.

Licensing and Registration Process

1. When Veera Server, Client or Runner is launched for the first time, a "License and Registration" window will open. Click Install New License in the dialog box.

2. Paste or type in the serial number provided by Rapid Insight and click OK. If a serial number has not been provided, please contact support.

3. The serial number will be verified against the Rapid Insight license server. This requires an active internet connection and the ability to verify with the site through any firewalls or virus scan software. It may be necessary to add exceptions to a web filter for both of these sites in:

   http://license.rapidinsightinc.com/RapidInsightLicensingService.asmx

   http://update.rapidinsightinc.com/RapidInsightUpdateService.asmx

4. Once the serial number is verified, the software must be registered. Enter the requested information and click Register. All of the fields on this screen are required.

5. After registration, the license has to be locked the machine's hardware so that the license can only be used on the registered computer. Click the 'Lock' button to continue. The software is ready for use.

VEERA SERVER SERVICE CREDENTIALS

The Veera Server Service works under a set of credentials (username/password). The credentials that are used by default may not always possess sufficient rights to run Veera effectively. To review and, if necessary, change these credentials, do the following:

- Open the Services window on the machine acting as the Veera Server
- Right-click on the Veera Server Service in the list and select "Properties"
- Select the "Log On" tab
- Change the account information to a set of credentials with sufficient privileges.
- Apply the new credentials
- Stop then Start the Veera Server Service

VEERA DATA ACCESS CREDENTIALS

All connections to data sources and data destinations (outputs) are made from the vantage point of the Veera Server. As such, any sets of data drivers that need to be installed (such as the Oracle Client) must be accomplished on the server rather than any of the clients. Any credentials that are required are also drawn from the server-side. This means the a user opting to make use of "Windows Credentials" to connect to a data source is actually relying upon the log in credentials on the server rather than those used to start the client machine.

For detailed descriptions of how to attach to a specific data source, please refer to the Veera User Manual.

DELEGATING ACCESS CREDENTIALS

Veera users are sometimes required to submit unique credentials to access a data source. In such cases, access may be denied unless the network has been properly configured to "delegate" authority to the Veera Enterprise Server to make such connections on behalf of a Veera Client.

To permit such delegation, the network's Active Directory properties must be set to permit delegation. This amounts to unchecking the "Account is sensitive and cannot be delegated" box.

After this, each individual client must be designated as a trusted source for delegation to any service, which includes the Veera Enterprise Server's Service. This is done on the data source.

Refer to this Microsoft help blog entry for a more complete description.
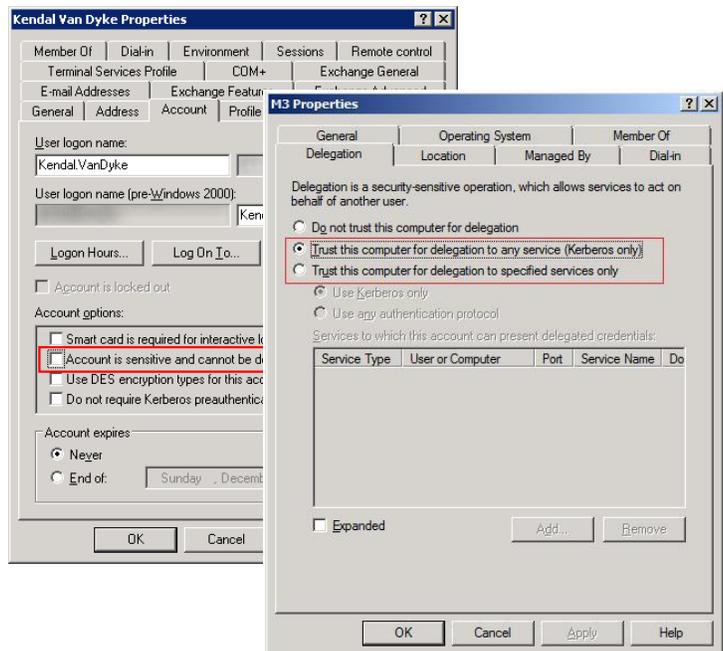
ADDING WINDOWS CREDENTIALS (FOR JOB SCHEDULING)

Certain nodes and functions in Veera may require the specific user's Windows credentials be provided by the Veera Client to run effectively under a Windows Service. These include COMMAND, SCRIPT, and R SCRIPT nodes, as well as any job scheduled to run automatically.

Enter the user's Windows (login) credentials in the Veera Client under TOOLS > OPTIONS > USE CREDENTIALS.
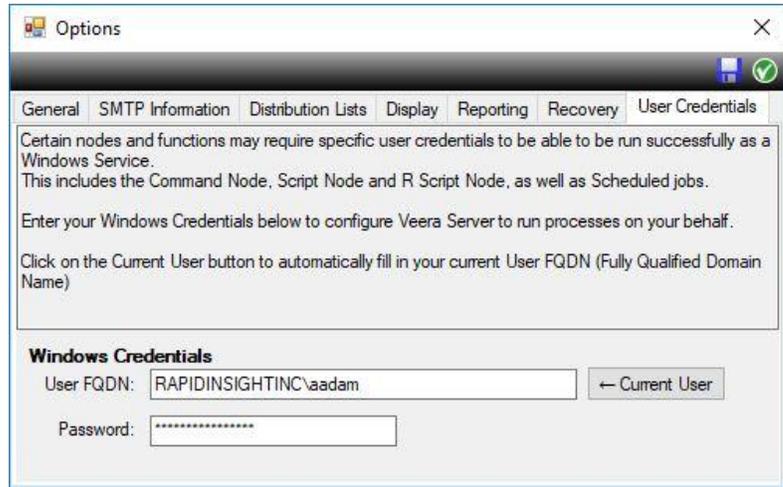
INSTALLING UPDATES TO THE PROGRAM

Veera Client and Veera Runner Client will automatically request permission to check for program updates on a weekly basis. If one is found, the user will be given the opportunity to download and install it.

To check for updates to the Veera Server, open the Veera Enterprise Manager and click on the Check for Updates button. If one is found, the user will be given the opportunity to download and install it.

RELOCATING THE VEERA SERVER TO NEW HARDWARE

If the need arises to transfer the Veera Server to a new piece of hardware, here are several steps that should be taken in order to make the move as smooth as possible while avoiding any possible data loss.

1. Open the Veera Enterprise Manager program on the existing server (this will appear in the Windows Program list). Use the Veera Enterprise Manager program to…
   a. Create a Veera Database Backup all of the clients' content (jobs and connections) and save the resulting .VBK file in a safe location (as a safety backup)
   b. Unlock/uninstall the Veera Enterprise Server license (Check Server License > Uninstall License). This will allow for it to be reapplied to the new environment
2. Install a new copy of the Veera Enterprise Server on the new machine (see instructions above).
3. Copy the folder "C:\ProgramData\Rapid Insight Inc\" from the original server machine and paste it onto the new server, overwriting the existing copy of that folder.
4. Open the Veera Enterprise Manager program on the existing server and apply the license (Check Server License > Install New License) to the new environment.
5. Stop and restart the service.
6. Locate the folder labeled "VeeraClient" on the Veera Enterprise Server. This will typically be found as a subfolder to "C:\Program Files\Rapid Insight Inc\Veera Server".
7. Copy the file "Client.config" from this location.

8. Paste a copy of this configuration file into the folder "C:\ProgramData\Rapid Insight Inc\Veera\Configuration" of every copy of Veera Client intending to connect to this server (overwriting any copies previously found there). This re-orients each Veera Client to be able to connect to the Veera Enterprise Server in its new location.

TRANSFERRING A VEERA CLIENT LICENSE TO NEW HARDWARE

If the need arises to transfer the Veera license to a new piece of hardware, the current software and license must be unlocked first. Since the serial number is specific to the current equipment, it will be required to be unlocked from the current hardware first. Once it has been unlocked the product can be uninstalled and reinstalled on the new hardware. The current code can then be locked to the new machine.

*Note: You need to uninstall the license **before** you uninstall the application. If you already uninstalled the application before unlocking the license, then reinstall the application, unlock the license, and then uninstall it again.*

UNINSTALLING/UNLOCKING A CLIENT LICENSE

1. To begin to uninstall a Veera Client or Veera Runner Client license, start the program, select Help from the menu bar, then select License and Register. To begin to uninstall a Veera Server license, open the Veera Enterprise Manager and click on the Check Server License button.
2. Click Uninstall License.
3. Since this will render the current product unusable, the product will prompt for confirmation of the uninstall process.
4. Click YES to continue.
5. The next prompt will be to unlock the software so that it can be properly removed from the current hardware. Click on Unlock software when prompted.
6. Uninstall the application from the workstation.
7. Reinstall the application with the same serial number on the new machine and proceed with registration and locking of the software.

EXPIRED LICENSE

It is the practice of Rapid Insight to send a renewal notice to the licensed user 30 days prior to the expiration of the license. When the renewal has been confirmed, the term of the license is extended. If the renewal lapses and is not confirmed, the software will expire and not be accessible.

TO RENEW A LICENSE

Once the renewal has been confirmed, the license will be useable without having to reinstall the software. If you receive a license error before the term of the license has expired, please contact Rapid Insight Support to have the issue resolved.

POINTS TO REMEMBER

- Veera Enterprise Server acts as the focal point for all of the software's interactions. The data sources that will contribute their records to any analyses must be reachable from that server.
- As the Veera Enterprise Server runs as a Windows Service, there are a set of network credentials associated with that service. These credentials provide access to drives on the computer hosting the Veera Server as well as any machines on the network. The level of access these credentials provide is universal; all Veera Clients enjoy the same level of access.
- Users of the individual Veera Clients connecting to the Veera Server do so either using their Windows credentials or a username & password exclusive to Veera Enterprise. These credentials are currently used solely for the purpose of communicating with the Veera Server.
- Each Veera Client user establishes their own, unique connections to data sources. These connections are never shared between users. If credentials are necessary to access the data (as in the case of a database server) then these are saved in an encrypted form along with the connection.

CONTACT US

For any issues/questions about Rapid Insight Veera, please send an email to Support at
support@rapidinsightinc.com