McKESSON
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Performance Analytics

Powered by Horizon Business Insight

Using the Standard DTS Templates to Import Data

Release 15.0
April 2010

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Publication date

April 2010
Produced in Ireland

Product

Horizon Business Insight Release 15.0

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Chapter 1 - Using Microsoft DTS to Import Data

Overview

Microsoft Data Transformation Services (DTS) provides you with the tools to move organizational data from disparate source systems to a single or multiple locations. As your source data is likely stored in a variety of formats, DTS tools allow you to transform the data as necessary to meet your organizational needs.

The Enterprise Horizon Business Insight software package includes the following DTS package templates. You can use these standard templates to export your source data and move it into a Horizon Business Insight subset.

- SubsetImportFromSQLServer DTS Package
- SubsetImportFromTextFile DTS Package
- SubsetImportFromTextFileBulk DTS Package
- SubsetTransferFromSQLServer DTS Package
- SubsetTransferFromTextFile DTS Package
- SubsetTransferFromTextFileBulk DTS Package

The properties of each package must be modified before it can be used for importing data. This document provides the information and instructions required to complete the necessary modifications and execute or schedule the data import. The following topics are discussed in the following pages:

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This document provides you with information and instructions specific only for using the customized DTS package templates noted above to import your source files to Horizon Business Insight. For additional information regarding Microsoft DTS functionality, refer to *SQL Server Books Online.*

Before you begin

Note the following information regarding using DTS to import your source data into a subset in Horizon Business Insight. It is recommended that you review this document in its entirety before you begin your import process.

Technical notes

- The audit log produced by the DTS import process indicates the number of records imported; detail of rejected rows is not included in the log.
- While the DTS import process is generally faster than importing through the Subset Editor, large import files may require a significant amount of time to process.
- Each of the DTS SubsetImport templates discussed in this document have an ActiveX step called *Updates* which runs after the source data has been inserted into the subset table and notifies HBI that the import process is complete.

  Similarly, each of the DTS SubsetTransfer templates have an *UpdateTransfer* step that must be run.

  The Updates and the UpdateTransfer steps run even when records have not been successfully inserted into the table. If the scripts are not run, the subset will remain locked and users will be unable to access the subset or the associated highlights.

  Do not modify your DTS package so that the Updates or UpdateTransfer step does not run on a failure.
- Before you attempt to open or edit the DTS package templates provided with Horizon Business Insight, you must update your Microsoft SQL Server 2005 or SQL Server 2008 environment. Instructions for doing so are provided in this document.

Installation notes

- The DTS package templates provided with the Horizon Business Insight 15.0 software are compatible with SQL Server 2005 and SQL Server 2008.
- The DTS package templates are included in the HBI 15.0 installation and upgrade software zip files that are available on the McKesson Download Central website.

  Once you have completed the upgrade of the HBI components and files, you will find the standard DTS templates in the following location: **C:\McKesson\HBI 15.0\DTS Templates**.

  Multi-server customers will find the templates in the location above on the SQL server.
- Once you have configured a DTS package, you must be logged into the server as MTS_WTUSER to run or schedule a package import.
- Use of mapped drives is not supported with DTS. Problems will be encountered when scheduling package updates.
- Be sure to review the remainder of this Overview before you attempt to use the DTS packages to import your data. You may need to perform certain steps, described in the following section, to update your Microsoft SQL Server environment.

Update your SQL Server environment

Microsoft has indicated that errors may be encountered when attempting to open and/or edit DTS packages in a SQL Server 2005 or SQL Server 2008 environment. In order to prevent these errors, you must update your SQL server environment. This section describes the information Microsoft has provided to to assist you in this area.

More information related to both SQL Server 2005 and SQL Server 2008 environments can be found at the URL below:

support.microsoft.com/kb/917406

This section descibes the information provided by Microsoft to assist you in resolving these environment issues so you can successfully utilize the standard DTS templates.

The following pages include procedures specific to SQL Server 2005 and SQL Server 2008 environment. Be sure to perform the procedures applicable to your Horizon Business Insight environment.

Update a Microsoft SQL Server 2008 environment

Customers who intend to use DTS packages in a Microsoft SQL Server 2008 environment must perform certain procedures to install additional support for DTS packages. For more information, refer to the Microsoft article at the URL below:

http://technet.microsoft.com/en-us/library/ms143755.aspx

The Microsoft article at the link above is provided for information purposes only. You do not need to complete all the steps noted in the Microsoft article. Certain portions of the procedures have already been completed, by default, during the installation of your SQL Server 2008 software.

Follow the steps in this section to update your SQL Server 2008 environment as necessary for use with DTS.

Note: If you are running Horizon Business Insight in a SQL Server 2005 environment, move on to the following section for the steps necessary to update your environment.

Install run-time support for Data Transformation Services packages

SQL Server 2008 does not install run-time support for DTS packages. Before you can run and manage DTS packages, you must perform the following procedure.

1. From the Microsoft website, download the following:

   Microsoft SQL Server 2005 Backward Compatibility Components X64 package *(SQLServer2005_BC_x64.msi)*

   This download can be accessed from the *Microsoft SQL Server 2008 Feature Pack, April 2009* page at the following Microsoft address:

   http://www.microsoft.com/downloads/details.aspx?familyid=B33D2C78-1059-4CE2-B80D-2343C099BCB4&displaylang=en

2. Run the executable to install the files on the database server.
3. On the Feature Selection window, click on the arrow to select and install all of the following:
   - Data Transformation Services 2000 runtime
   - SQL Distributed Management Objects
   - Replication component
   - SQL virtual Device Interface
   - Decision Support Objects
4. Click Next to continue.
5. Click Install.
6. Click Finish.

Install design-time support for Data Transformation packages

SQL Server 2008 does not install design-time support for DTS packages. You must perform the following procedure.

1 From the Microsoft website, download the following:

SQLServer2005_DTS.msi

This download can be accessed from the *Feature Pack for Microsoft SQL Server 2005 - December, 2008* at the following Microsoft address:

http://www.microsoft.com/downloads/details.aspx?FamilyID=536fd7d5-013f-49bc-9fc7-77dede4bb075&displaylang=en

---

IMPORTANT: Click the **Download** button; do not download via the hyperlink on the *Feature Pack* page.

---

2 Run the executable to install the files on the database server.

3 Reboot the database server.

Copy .dll files to a new location on the database server

After you have completed the procedures above and rebooted the HBI database server, follow the steps below to ensure that the DTS designer can be used in SQL Server Management Studio.

Copy the files noted in the table below to the location on the database server indicated in the table below.

1.	Copy these files:	SEMSFC.DLL, SQLGUI.DLL, SQLSVC.DLL
	From this folder:	ProgramFiles(x86)\Microsoft SQL Server\80\Tools\Binn
	To this folder:	ProgramFiles(x86)\Microsoft SQL Server\100\Tools\Binn\ VSShell\ Common7\IDE
2.	Copy these files:	SEMSFC.RLL, SQLGUI.RLL, SQLSVC.RLL
	From this folder:	ProgramFiles(x86)\Microsoft SQL Server\80\Tools\Binn\ Resources\[*lang_id*]
	To this folder:	ProgramFiles(x86)\Microsoft SQL Server\100\Tools\Binn\ VSShell\ Common7\IDE\Resources\[*lang_id*] (e.g., for U.S.English, the land_id subfolder is “1033”.)

You can now open the DTS package(s) and make your modifications.

Update a Microsoft SQL Server 2005 environment

Customers who intend to use DTS packages in a Microsoft SQL Server 2005 environment must perform certain additional procedures to install additional support for DTS packages.

Follow the steps in this section to update your SQL Server 2008 environment as necessary for use with DTS. If you have already completed any of the procedures below during the implementation of your SQL Server 2005 environment, you do not need to do so again.

Note: If you are running Horizon Business Insight in a SQL Server 2008 environment, this section does not apply to you. Follow the steps in the previous section to update your environment.

Install design-time support for Data Transformation packages

SQL Server 2005 does not install design-time support for DTS packages. You must perform the following procedure.

1 From the Microsoft website, download the following:

SQLServer2005_DTS.msi

This download can be accessed from the *Feature Pack for Microsoft SQL Server 2005 - December, 2008* at the following Microsoft address:

http://www.microsoft.com/downloads/details.aspx?FamilyID=536fd7d5-013f-49bc-9fc7-77dede4bb075&displaylang=en

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IMPORTANT: Click the **Download** button; do not download via the hyperlink on the *Feature Pack* page.

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2 Run the executable to install the files on the database server.

3 Reboot the database server.

File modification required for SQL Server 2005

The following steps must be performed by customers with a SQL Server 2005 environment before you can edit your DTS packages.

Note: The following information contains steps to modify a file on your HBI database server. It is essential that you back up the file before you modify it.

---

1 Navigate to the location shown below:

x:\Program Files(X86)\Microsoft SQL Server\90\Tools\Bin\VSShell\Common7\IDE folder

(*where x represents the drive letter where SQL Server 2005 is installed.*)

2 In the IDE folder, locate the **Sqlwb.exe.manifest** file and open it in Notepad or other text editor.

3 Remove the lines of code shown below from the **Sqlwb.exe.manifest** file.

```
<dependency>
<dependentAssembly>
<assemblyIdentity type="win32" name="Microsoft.Windows.Common-
 Controls" version="6.0.0.0" processorArchitecture="x86"
 publicKeyToken="6595b64144ccf1df" language="*"></assemblyIdentity>
</dependentAssembly>
</dependency>
```

4 Save the changes to the file and exit the text editor.

You can now open the DTS package(s) in SQL Server 2005 and make your modifications.

Create a subset definition

Before you can import data from your source system, you must create a subset definition in the Horizon Business Insight Subset Editor. Once the subset definition has been created, you can perform successive imports into the definition you have created. You do not need to redefine the subset prior to each import run.

For more information and the steps necessary to complete this procedure, refer to the chapter entitled, “Using the Subset Editor” in the *Horizon Business Insight User Guide*.

Before you begin

Note the following before you create your subset definition:

- You must create a sample file that mirrors the format of the file to be imported into the Subset Editor. Your sample file can be as simple as a single line of text with the appropriate formatting.
- In the Subset Editor, when you define your subset, select ASCII as the file type and browse to the sample file you created.
- Make a note of the delimiter you choose for the subset definition.
- After you have completed your subset definition and saved it, you will be prompted to import your file. Select **No** to import your file immediately. Information is provided later in this section on how to execute the import.

Additional Subset Editor tasks

Before you log out of the Subset Editor, follow the steps below:

1. On the Subset List window, click the box to the left of the name of your new subset to select it.
2. Click **Info** located in the menu bar at the top of the window.
3. From the Info window, locate and write down the ID number that has been assigned to your subset by the Subset Editor.

   You will need to enter this number as a global variable when you configure the properties of your package.

Once you have completed the steps above. Move on to the next section of this document and continue.

Select your DTS packages

Following is a brief description of each of the six DTS package templates and a recommendation on when to select it for importing your source data to the Horizon Business Insight Subset Editor.

SubsetImportFromSQLServer DTS Package

This package can be used to import data into a subset from another SQL server database. When you select this package, your source data can be specified as a table in the source database or defined as an SQL query on the tables in the source database.

Use this package to import your source file without first having to export to a text file. This package allows you to join data from multiple tables.

SubsetImportFromTextFile DTS Package

This package can be used to import data into a subset from a text file.

Use this package when you need to make conversions (transformations) to your source data before importing into the subset table.

SubsetImportFromTextFileBulk DTS Package

This package can be used to import data into a subset from a text file.

Use this package when you need the fastest import possible from a text file and no conversions (transformations) to your source data are necessary before importing into the subset table.

SubsetTransferFromSQLServer DTS Package

This package can be used to import data into a subset from another SQL server database. When you select this package, your source data can be specified as a table in the source database or defined as an SQL query on the tables in the source database.

Use this package to import your source file without first having to export to a text file. This package allows you to join data from multiple tables.

This package separates the data transfer process from the update steps so you can work with the combined new and existing data before the highlights, alerts and scorecards associated with the subset are updated.

SubsetTransferFromTextFile DTS Package

This package can be used to import data into a subset from a text file.

Use this package when you need to make conversions (transformations) to your source data before importing into the subset table.

This package separates the data transfer process from the update steps so you can work with the combined new and existing data before the highlights, alerts and scorecards associated with the subset are updated.

SubsetTransferFromTextFileBulk DTS Package

This package can be used to import data into a subset from a text file.

Use this package when you need the fastest import possible from a text file and no conversions (transformations) to your source data are necessary before importing into the subset table.

This package separates the data transfer process from the update steps so you can work with the combined new and existing data before the highlights, alerts and scorecards associated with the subset are updated.

Save DTS storage file to the HBI SQL Server

The DTS package templates are provided with the Horizon Business Insight software as structured storage files. Before you can run your package, you must save the file to the Horizon Business Insight SQL server. Follow the steps below to do so.

Note: You must be logged into the Horizon Business Insight SQL server to perform the procedure in this section.

Follow the instruction in this section to save the DTS storage file to the SQL server.

1 Log on to the Horizon Business Insight SQL server.

2 From the **Start** menu, select **Programs/Microsoft SQL Server/Microsoft SQL Server Management Studio.**

3 On the Connect to Server window, select *Database Engine* from the **Server type** dropdown list and click **Connect**.

Figure 1-1 SQL Server Connect to Server window.

4 In the **Microsoft SQL Server Management Studio** window, expand the tree view in the left pane.

5 Expand **Databases/WebTrend** and click **Tables** to display the list of tables.

6 In the left pane, right-click on **dbo.wt_databases** as shown in the picture below.

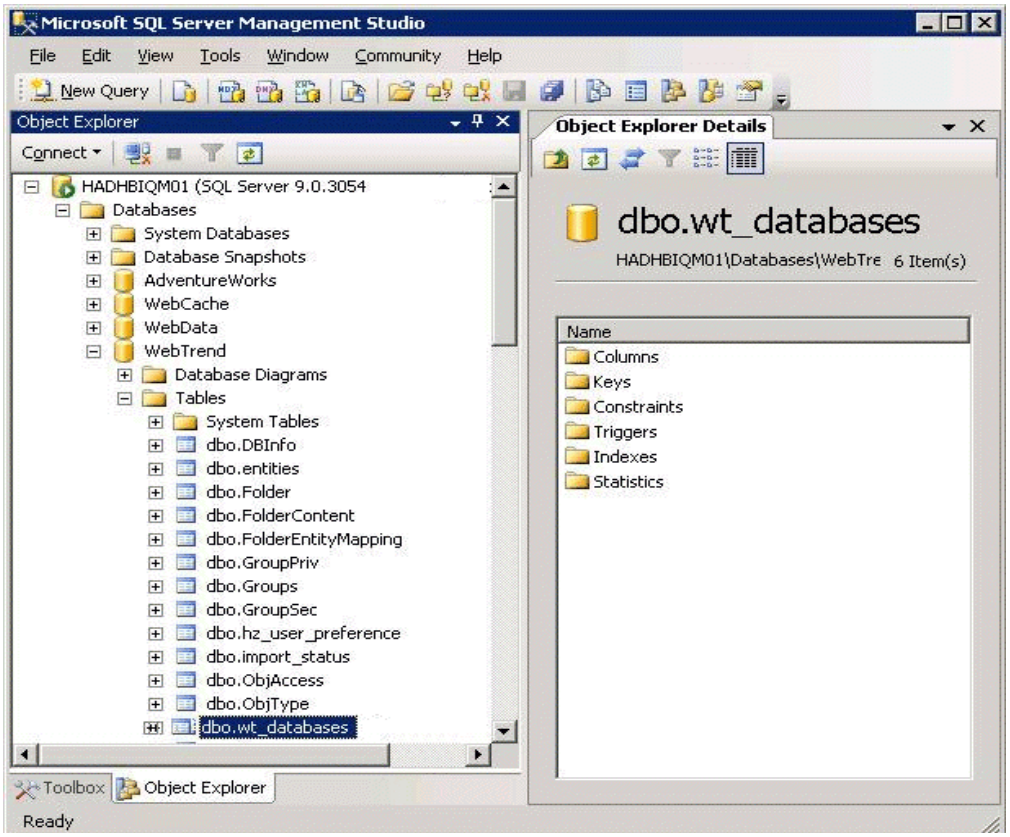

Figure 1-2 Microsoft SQL Server Management Studio.

7 From the shortcut menu, select **Open Table**.

8 From the data table, locate and write down the **unique_id** for the database into which your data will be imported.

Note: The default database on the Horizon Business Insight SQL server is called “WebData.” Select WebData unless your organization has created another database on the server.

You will need to enter this number as a global variable when you configure the properties of your package.

	unique_id	server_name	db_name
	501.7	<NULL>	WebTrend
▶	510.7	<NULL>	WebData
*			

Figure 1-3 List of tables in dbo.wt_databases on SQL Server.

9 Close the dbo.wt_databases window.

10 Still in Microsoft SQL Server Management Studio, in the tree view in the left pane, expand **Management,** then **Legacy**.

11 Right-click on **Data Transformations Services** and click **Open Package File...** from the shortcut menu.

12 From the Select File window, navigate to the following location: **X:\Server\WTDtsTemplates** (where X represents the drive letter on the server where you stored the Horizon Business Insight software after downloading it from the McKesson Download Central website).

The following files are displayed in the directory:

- SubsetImportFromSQLServer.dts
- SubsetImportFromTextFile.dts
- SubsetImportFromTextFileBulk.dts
- SubsetTransferFromSQLServer.dts
- SubsetTransferFromTextFile.dts
- SubsetTransferFromTextFileBulk.dts

13 Highlight the package you want to use to import your data and click **Open**.

14 If the Select Package window is displayed, highlight the package and click **OK**.

The file will open and the Package window is displayed. The SubsetImportFileFromSQLServer Package window is shown below.

Note: If you selected a different package, the process displayed as icons at the top of the window may be somewhat different.

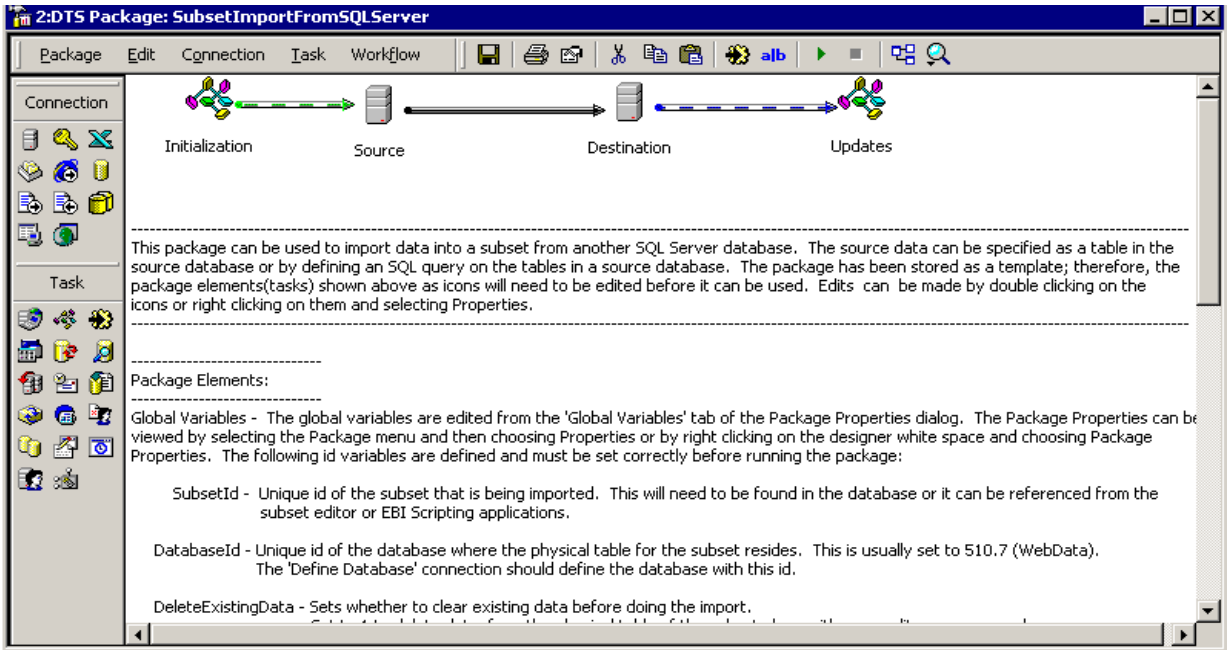

Figure 1-4 Open package display: SubsetImportFromSQLServer.

15 From the menu bar, click **Package/Save As**. The window below is displayed.

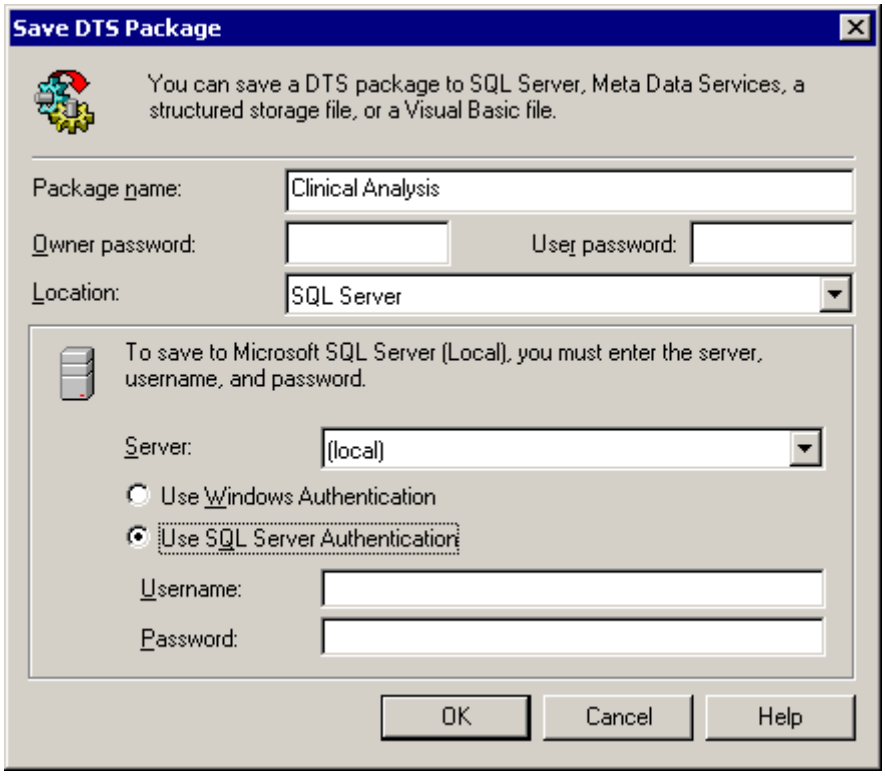

Figure 1-5 Save DTS package window.

- In the **Package name**: box, type a name for your import (select a name that is associated with the corresponding subset).
- In the **Location**: box, select SQL Server.
- From the **Server**: box, select the name of the Horizon Business Insight SQL server.
- Choose an authentication method. If you select **Use SQL Server Authentication**, you must enter a valid SQL server username and password in the appropriate text boxes.
- Click **OK** to save the package.

You have completed the steps necessary to save the DTS structured storage file to the Horizon Business Insight SQL server.

Move on to the section entitled, Edit your DTS packages.

Edit your DTS packages

Use the instructions in this section to define the global variables, to enable the SQL logging and error handling features and to define destination, data source and data transformation properties for the DTS packages you have selected for use.

Access the DTS packages

Follow the steps below to access the DTS packages:

1. On the HBI database server, navigate to your SQL server management application and open Microsoft SQL Server Management Studio.
2. In the left pane, expand the following:

   Management>Legacy
3. Select **Data Transformation Services**.
4. Right-click on the DTS package and choose **Open Package File** from the shortcut menu.

Once you have opened the selected DTS package, edit the package properties as discussed in the remaining sections of this chapter.

Be sure to edit the properties for each DTS package as discussed in the instructions for each section.

Define global variables

Global variables are established on the DTS Package Properties window. This section provides you with the information and procedures you need to define the following variables:

- **SubsetId** - ID assigned by the Subset Editor to the subset you created for this import. See Create a subset definition.
- **DatabaseId** - unique_id assigned to the database into which your data will be imported. See Save DTS storage file to the HBI SQL Server.
- **DeleteExistingData** - Establishes whether incoming data overwrites or is appended to any data that is already present in the subset.

Follow the steps below to set the global variables for your package.

1 From the DTS Package window, select **Package/Properties** and click on the Global Variables tab.

Note: Be sure that none of the process icons are highlighted when you select **Properties** from the **Package** menu.

The window shown below is displayed.

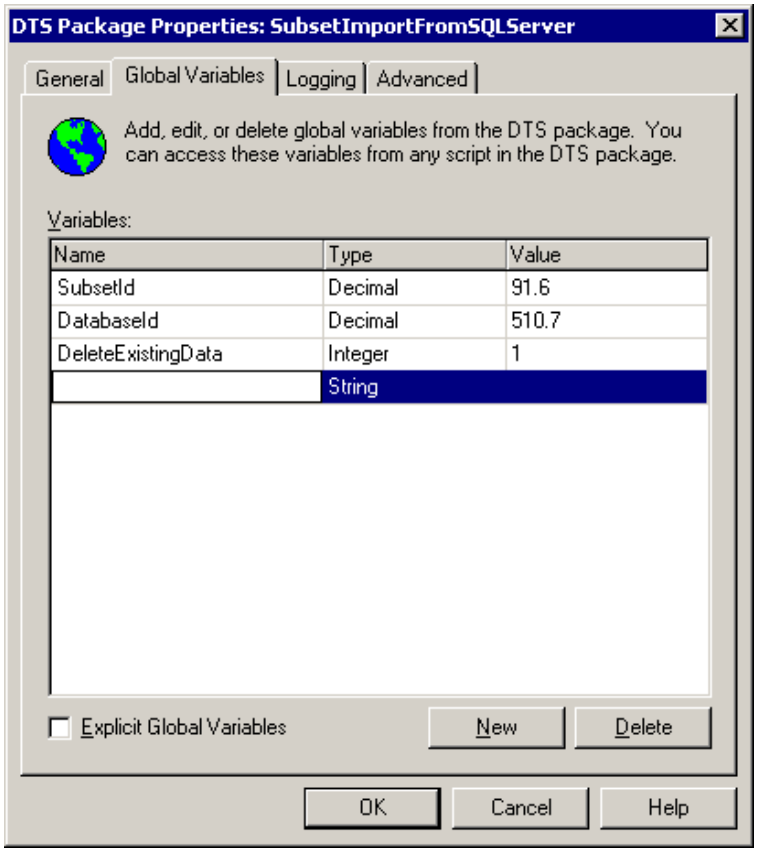

Figure 1-6 DTS Package Properties - Global Variables tab.

2 In the Variables table, type the following information in the Value column:

- **SubsetId**: ID number that was assigned to the subset you created for this import.
- **DatabaseId**: unique_id assigned to the database into which your data will be imported. The DatabaseId you enter is used to define the destination connection.
- **DeleteExistingData**: Type the number 1 if you want incoming data to overwrite data already in the subset. Type the number 0 if you want to append incoming data to the data already in the subset.
  - If you enter a 1 to overwrite, all data existing in the subset is deleted and replaced with the incoming data.
  - If you enter a 0 to append, the existing data is not eliminated. Instead new data records are added to the existing data. Where duplicate records exist, they will be merged when the data is displayed.

3 Click **OK** to accept the changes, then save the package.

Enable logging and error handling functions

The Microsoft DTS logging and error handling functions are optional. However, when these functions are enabled for each DTS package that runs on the HBI database server, you can easily monitor the success or failure of your scheduled DTS imports and troubleshoot import errors, if they occur.

The logging and error handling functions are found on the Logging tab of the DTS Package Properties window shown below.

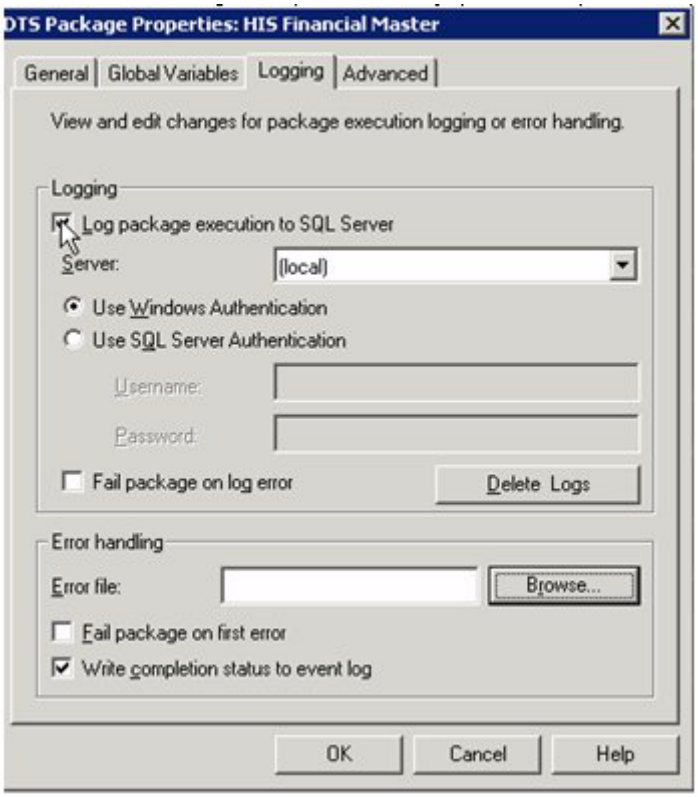

Figure 1-7 DTS Logging and Error handling properties - Logging Tab.

The next section describes the logging and error handling functions. Once you have read the information, if you decide to enable one or both of these options, you can access the window shown above by logging into the database server and selecting **Package/Properties** from the DTS Package window. Once you have done so, click on the Logging tab.

Note: You must enable these functions for each DTS package that you want to monitor.

Logging

When you enable the checkbox entitled, **Log package execution to SQL server,** information is stored in the *Job* and *Job Step* tables each time the current DTS package is run on the HBI database server. The data from the tables is then used to populate the Horizon Business Insight DTS Import Alert Highlight.

It is recommended that you access these options directly from the database server. As such, select *(local)* in the **Server** field.

Job and Job Step Table maintenance

When **Logging** is enabled, data is appended to the Job and Job Step tables each time the DTS package is run on the HBI server. As there is no automatic mechanism to purge the data from the tables, without periodic maintenance they can get quite large.

Your Database Administrator can use the following SQL commands to regularly purge data from the Job and Job Step tables.

- If you want to delete records older than a specific date; e.g., January 1, 2006:

  delete msdb.dbo.sysdtssteplog where endtime < '01-01-2006'

  delete msdb.dbo. sysdtspackagelog where endtime < '01-01-2006'

- If you want to delete records more than a specific number of days old; e.g., 90 days

  delete msdb.dbo.sysdtssteplog where endtime < DATEADD(dd, -90, getdate())

  delete msdb.dbo. sysdtspackagelog where endtime < DATEADD(dd, -90, getdate())

Additional information related to handling historical data can be found in the ***e-answers* Knowledge Base**. Select Horizon Business Insight from the product list and enter "*how to purge data*" in the search field.

Horizon Business Insight DTS Import Alert Highlight

This system-generated highlight is automatically updated each time the package runs. It allows you to view current information about whether or not a scheduled import for this DTS package has succeeded or failed.

The **Horizon Business Insight DTS Import Alert** highlight includes the following dimensions and measures.

Horizon Business Insight DTS Import Audit	
Highlight Dimensions	Highlight Measures
Name A DTS package is only included in the highlight if Logging has been enabled	Status 0 = process completed successfully 1= process failed
Start Time	
Step Name	

If a DTS import fails, you can drill down into the highlight to determine which step in the process failed.

Users must be granted access to this highlight from the Horizon Business Insight Administrator site in order to view it. You cannot modify system-generated highlights in the Highlight Editor.

Error handling

When you enable **Error handling** for a Microsoft DTS package, a file providing error information for each step is created during the execution of the DTS package.

To enable this function, from the DTS Properties window, click **Browse** and specify the location where you want to store the error file. While you can choose to store the file anywhere on the HBI server, McKesson recommends that you store the file as a text-type resource file at the following location.

…\inetpub\wwwroot\webtrend\resource\1_7\text

When stored as a Resource at the location above, the file must be refreshed in the HBI Administrator site and then users must be granted access to it. Once these steps have been completed, the file can be displayed in the Horizon Business Insight Viewer.

It is recommended that you retain the default selection to **Write completion status to event log**.

Maintaining the error file

As data regarding each subsequent DTS package import is appended to the end of the error file, it will continually increase in size. Therefore, it is suggested that you take steps to maintain this file. You can either delete the file from the HBI server or rename it. In either case a new file will be generated the next time the DTS package is run.

Define destination properties

This section provides you with the information and instructions you need to define the connection to the database that will receive the incoming data.

- server name
- database name
- authentication method

Follow the steps below to set destination properties for your DTS package.

1 From the DTS Package window, double-click on the **Destination** icon to open it.

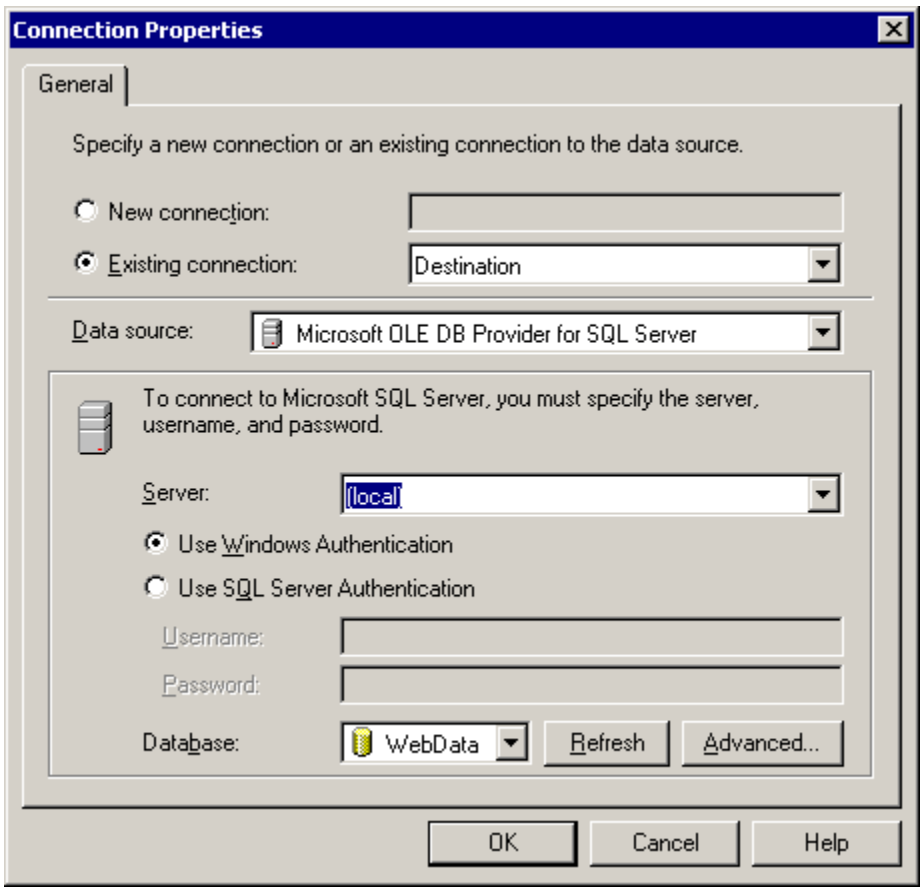

Figure 1-8 DTS Package destination Connection Properties window.

2 Verify the **Server** box indicates "*local*".

3 Click to select the appropriate authentication method.

4 From the **Database**: box, select the database that is defined with the DatabaseId you entered previously in the Global Variables section.

5 Click **OK**.

6 If you selected the SubsetImportFromTextFileBulk DTS Package, you have completed the destination set up procedures for the package. You do not need to complete the remaining steps in this section. Move on to the following section, “Define source and data transformation properties.”

If you selected the SubsetImportFromTextFile DTS Package or the SubsetImportFromSQLServer DTS Package, move on to the next step in this section.

7 From the Task References window, click **Select All** to delete transformations for all tasks.

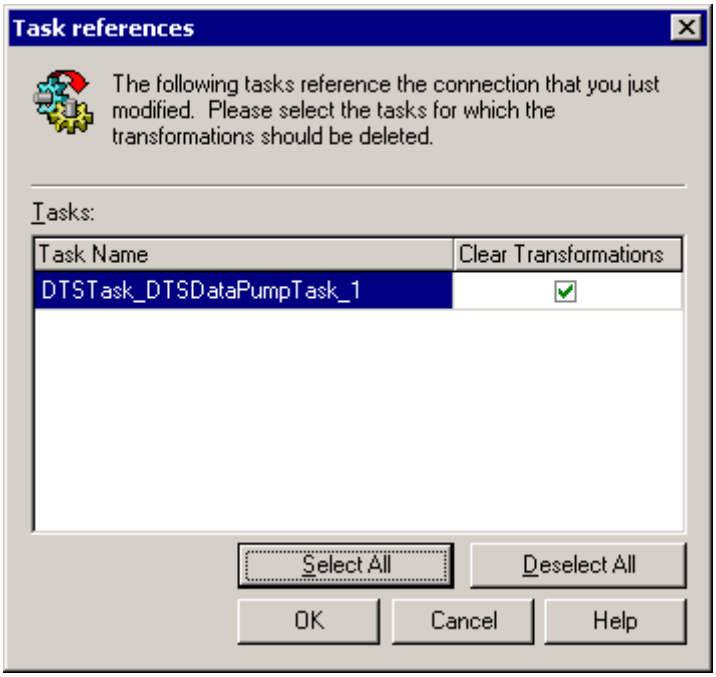

Figure 1-9 Task references window to delete all package transformations.

8 Click **OK**.

You have completed the destination setup procedures. The next section of this document provides steps to complete the setup procedures. Note that the required steps differ for each of the three DTS packages. Be sure to follow the instructions in the section that corresponds to the package you have selected.

Define source and data transformation properties

At this point you have completed and saved a version of your DTS package template to the Horizon Business Insight SQL server, defined your global variables and completed the procedures necessary to define the destination properties.

This section provides you with the information and instructions necessary to define your source connection and, if applicable to your package, the data transformation method.

Note: This section sets forth the steps necessary to complete the package modifications. The required modifications differ for each of the DTS package templates provided with Horizon Business Insight. Be sure to follow the instructions associated with the package you have selected.

SubsetImportFromTextFileBulk DTS Package

Follow the steps below to define the connection to the source text file that contains the data and destination table for the SubsetImportFromTextFileBulk DTS Package.

1 From the DTS Package window, double-click on the **Bulk Insert** icon to display the window shown below.

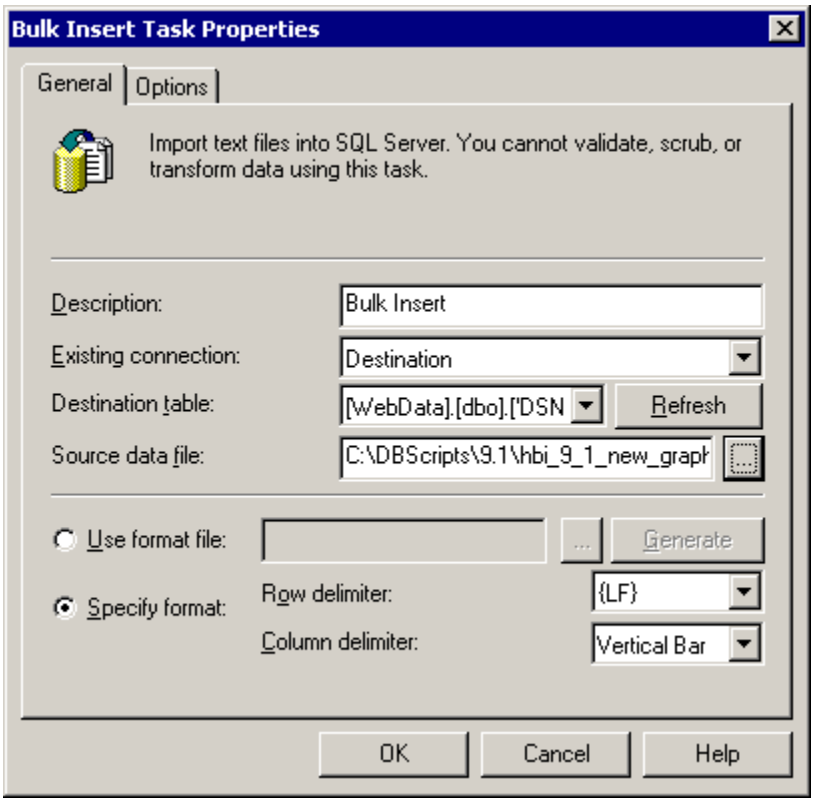

Figure 1-10 Bulk Insert Task Properties/General tab for SubsetImportFromTextFileBulk DTS Package.

2 On the **General** tab, modify the properties as follows:

- Verify that "*Destination*" is selected as the **Existing Connection**.
- Select the **Destination table**. This is the subset table into which your data will be imported.
- In the **Source data file**: box, use the browse button to navigate to the location of your import file. (The **Source data file** box must display the full path name to the file.)
- Select **Specify format** and select the row and column delimiter used in your import file.

3 If your import file includes a header row, click the **Options** tab and modify the settings as follows:.

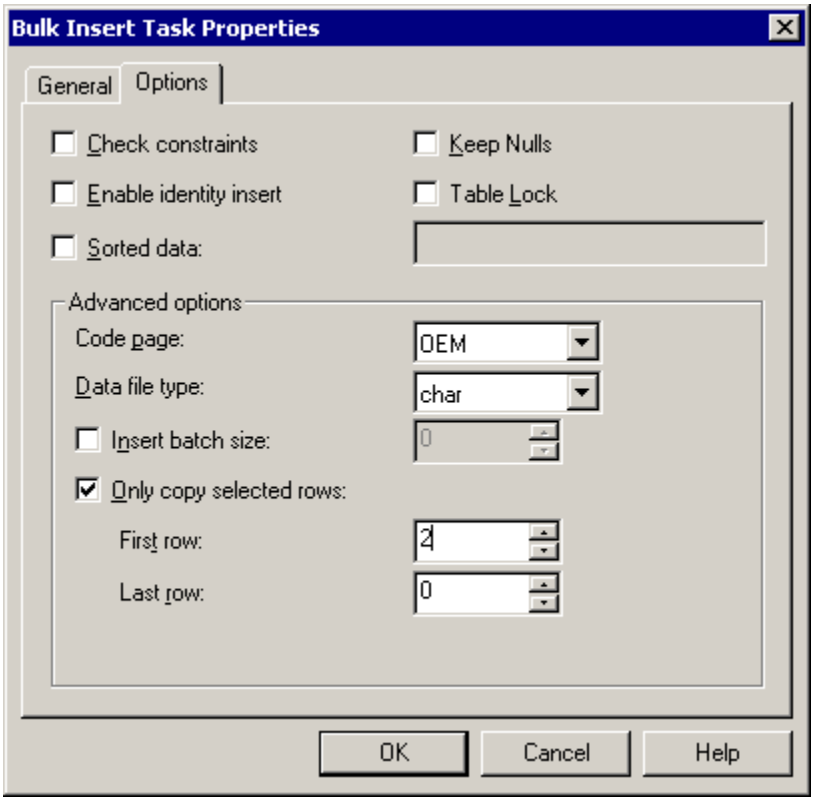

Figure 1-11 Bulk Insert Task Properties/Options tab for SubsetImportFromTextFileBulk DTS Package

- In the Advanced options area, check **Only copy selected rows**:
- In the **First row**: box, enter the number of the first data row.
- The **Last row**: box should be set to 0.

4 Click **OK** to close the window.

5 On the DTS Package window, click **Package/Save** to save your changes to the package.

You have completed the final setup procedures. Move on to the section entitled, "Execute package import - immediately or scheduled."

SubsetImportFromSQLServer DTS Package

Follow the steps below to define how your source data should travel to the destination in the SubsetImportFromSQLServer DTS Package.

1 From the DTS Package window, double-click on the **Data Transformation Task** icon.

Note: The icon is represented by the black arrow connecting the Source and Destination icons. The window shown below is displayed.

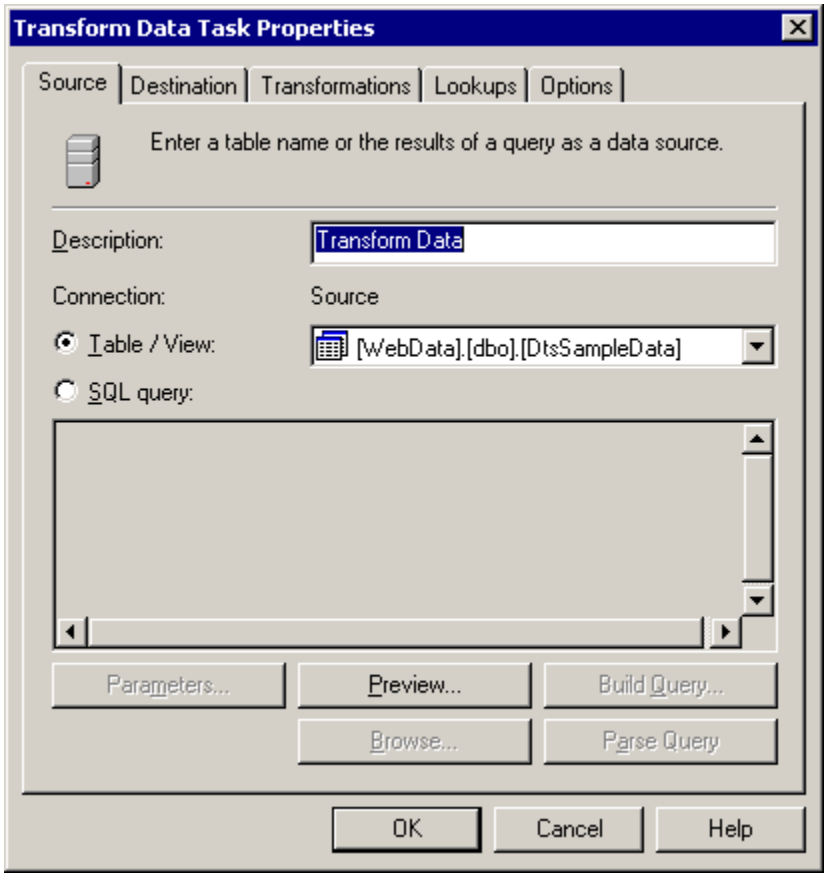

Figure 1-12 Transformation Data Task Properties window for SubsetImportFromSQLServer Package.

2 Select the **Source** tab and modify the settings as follows:

- Select a Source Connection. Choose either **Table/View** or **SQL query**.
  - If you choose **Table/View**, select the desired source table from the list box.

- If you choose **SQL query**, then you must provide the SELECT query in the text box. You can build, type or copy and paste the query into the box. All tables referenced by your query must be included in the source database.

3 Select the **Destination** tab and choose your destination table from the list. This is the table into which your source data will be imported. If the table is not shown in the list, your subset has not been properly created.

4 Click **OK** to close the Transformation Data Task Properties window.

5 Again, from the DTS Package window, double-click on the **Source** icon. The Connection Properties window, shown below is displayed.

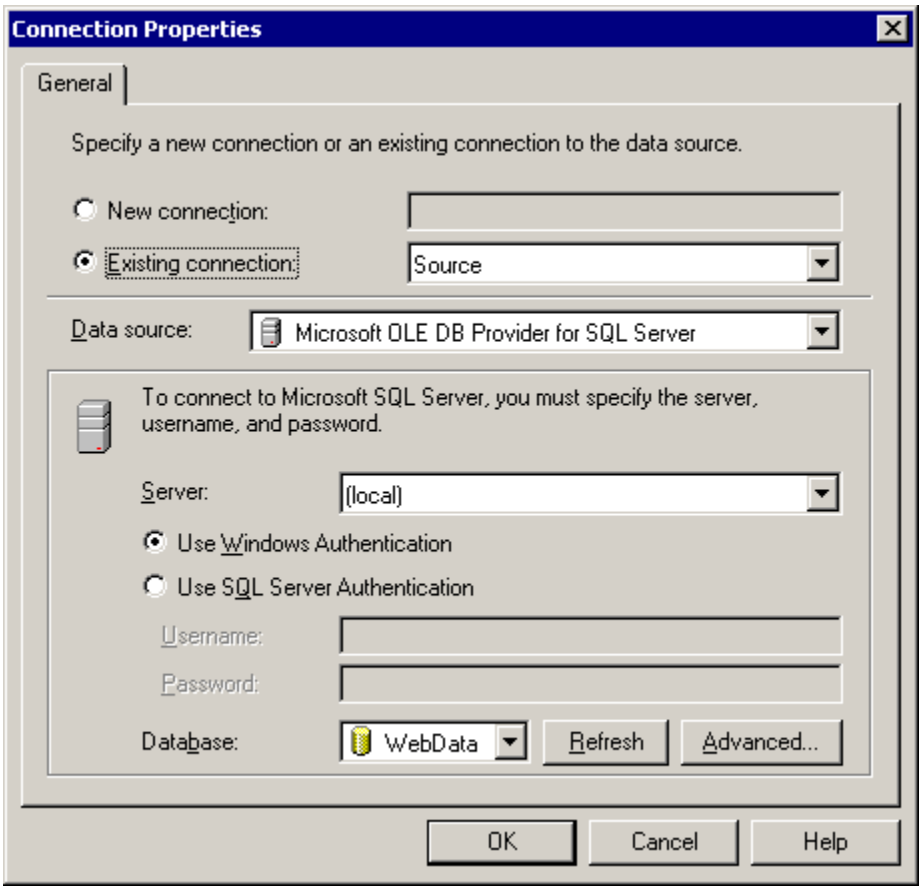

Figure 1-13 Source Connection Properties window for SubsetImportFromSQLServer Package.

- In the **Server**: box, select a server from the list box.
- Select the appropriate authentication method for the server you chose.
- Use the **Database**: list box to select the database where your source data is located.
- Click **OK**.

6 From the Task References window, click **Select All** to delete transformations for all tasks.

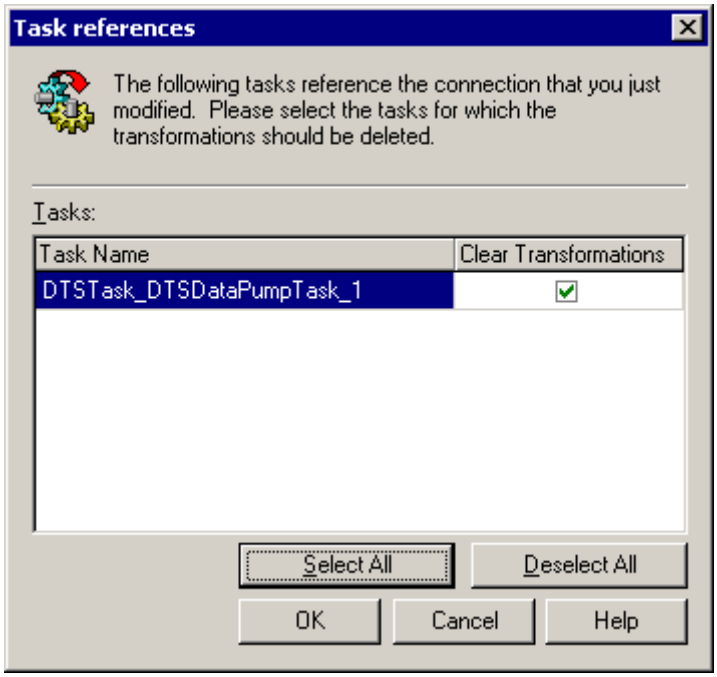

Figure 1-14 Task references window to clear all transformations for SubsetImportFromSQLServer Package.

7 Click **OK**.

8 On the DTS Package window, click **Package/Save** to save your changes to the package.

You have completed the final setup procedures. Move on to the section entitled, "Execute package import - immediately or scheduled."

SubsetImportFromTextFile DTS Package

Follow the steps below to define the following for the SubsetImportFromTextFile DTS Package:

- how the source data should travel to the destination
- the connection to the source text file that contains the incoming data

1 From the DTS Package window, double-click on the **Data Transformation Task** icon.

Note: The icon is represented by the black arrow connecting the Source and Destination icons. The window shown below is displayed.

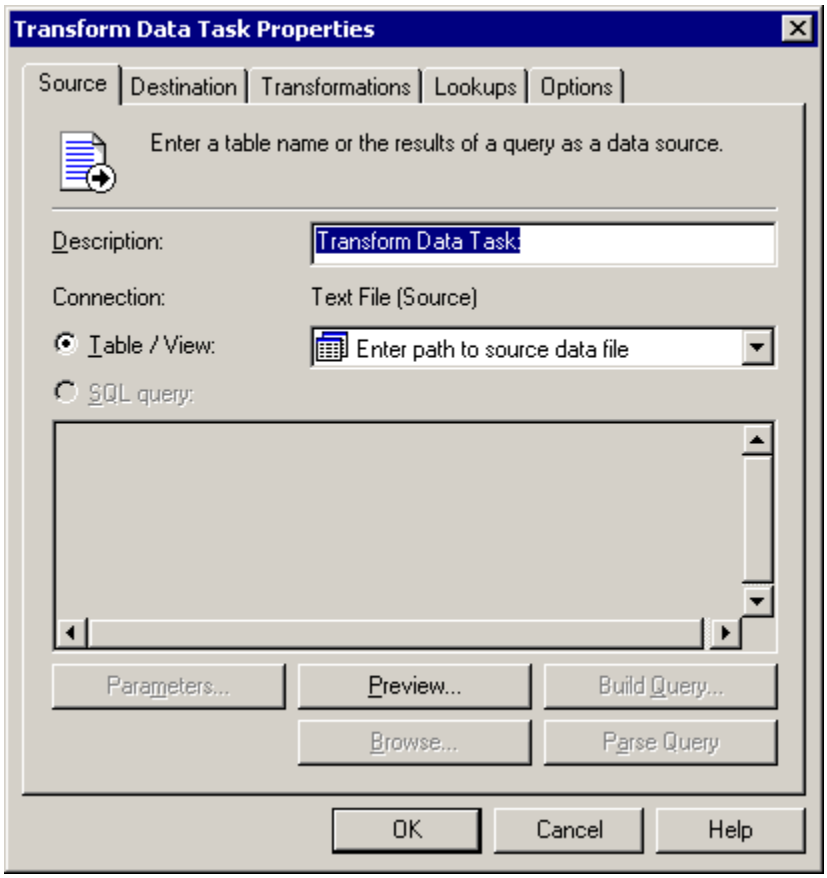

Figure 1-15 Transform Data Task Properties window for SubsetImportFromTextFile Package.

2 Select the **Source** tab and select the correct Text File (Source) connection from the list box.

3 Select the **Destination** tab and choose your destination table from the list. This is the table into which your source data will be imported. If the table is not shown in the list, your subset has not been properly created.

Note: If you encounter an error message at this point, click **OK** to close the message and continue.

---

4 Click **OK** to close the Transformation Data Task Properties window.

5 Again, from the DTS Package window, double-click on the **Text File (Source)** icon. The Connection Properties window, shown below, is displayed.

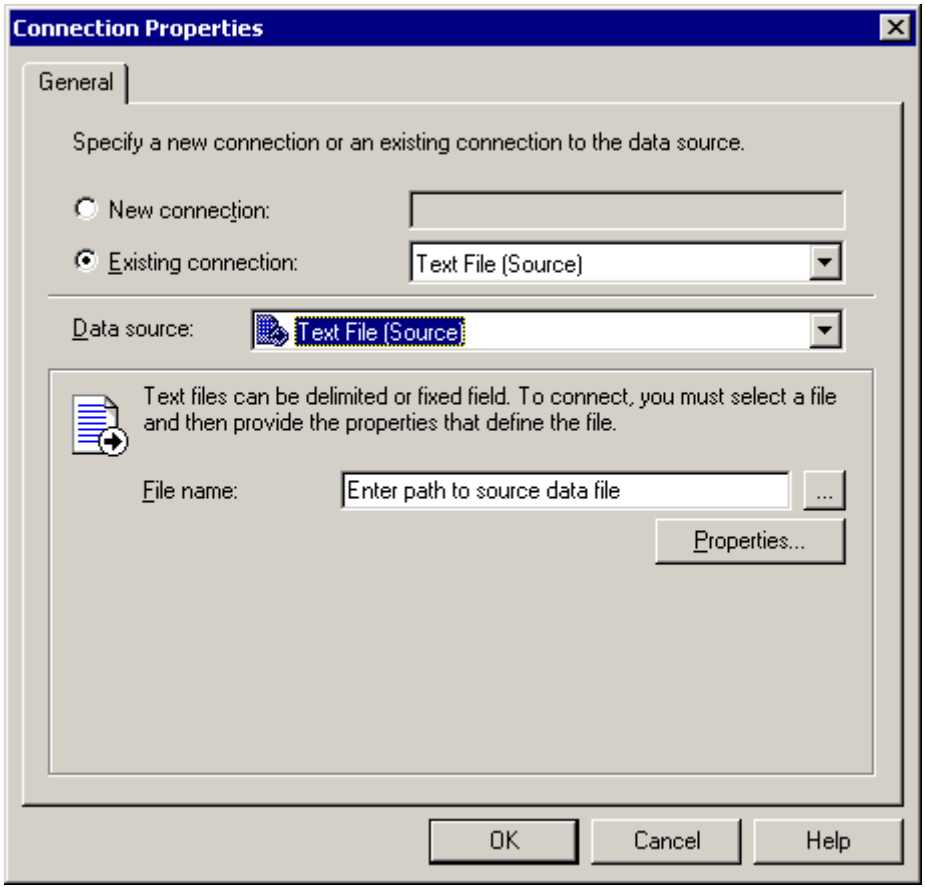

Figure 1-16 Source Connection Properties window for SubsetImportFromTextFile Package.

6 In the **File name**: box, use the browse button to navigate to the location of your import file. (The **File name** box must display the full path name to the file.)

7 Click **Properties** to open the Text File Properties window and initiate the properties wizard.

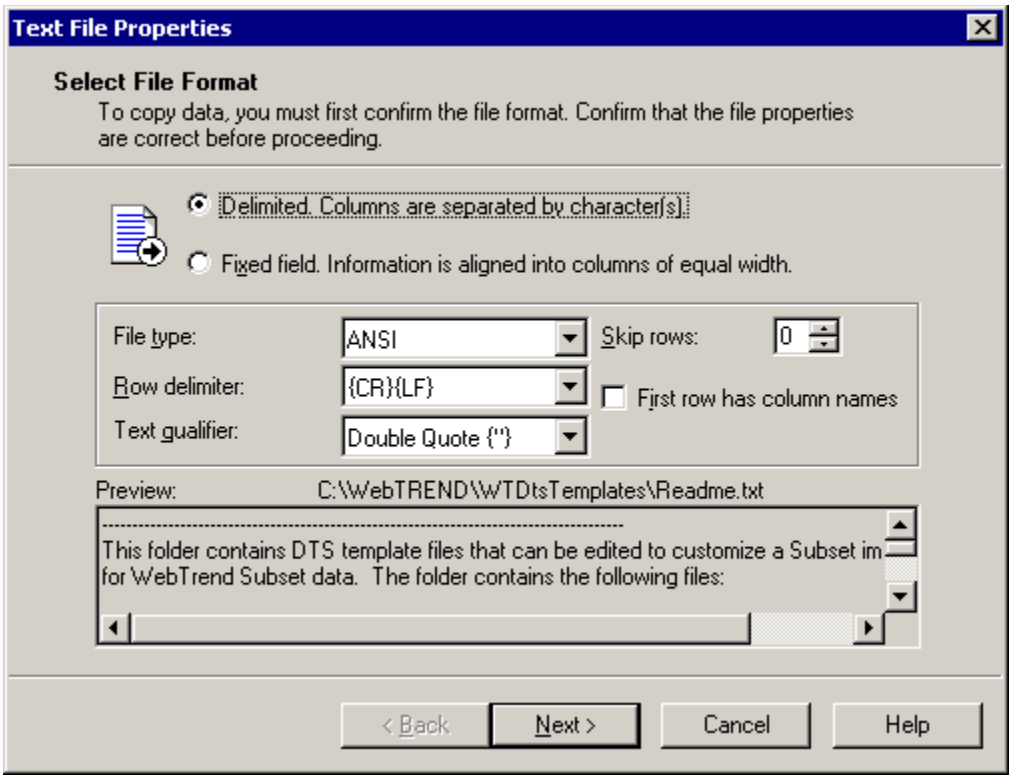

Figure 1-17 Text File Properties window for SubsetImportFromTextFile Package.

Use the Text File Properties wizard to define how your data is organized in the source file. The wizard allows you to define whether your file is delimited or fixed field, the file type, and, if application, row delimiter and text qualifiers.

- If your source file includes a header, be sure to use the **Skip rows**: box to enter the number of rows in the header.
- Click **Next** to move to the following window. Click **Back**, if necessary, to return to the previous window.
- When you have completed your properties selections, click **Finish**. You will be returned to the Connection Properties window.

8 On the Connection Properties window, click **OK**.

9 The Task References window is displayed. Click **Select All** to delete transformations for all tasks.

10 Click **OK** to close the window.

11 On the DTS Package window, click **Package/Save** to save your changes to the package.

You have completed the final setup procedures. Move on to the section entitled, "Execute package import - immediately or scheduled."

SubsetTransferFromTextFileBulk DTS Package

Follow the steps below to define the connection to the source text file that contains the data and destination table for the SubsetImportFromTextFileBulk DTS Package.

1 From the DTS Package window, double-click on the **Bulk Insert** icon to display the window shown below.

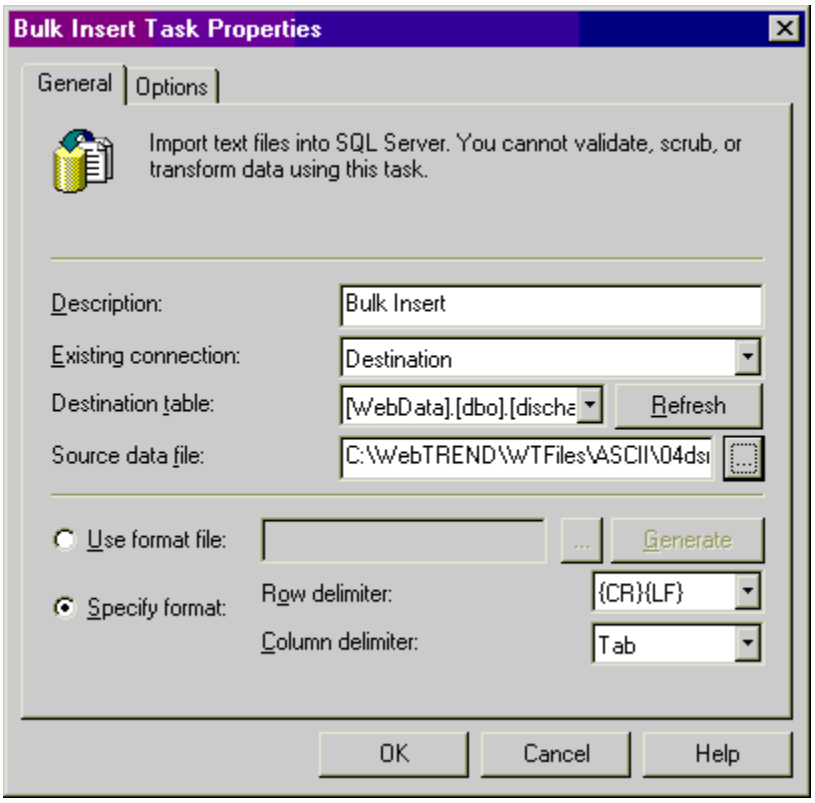

Figure 1-18 Bulk Insert Task Properties/General tab for SubsetImportFromTextFileBulk DTS Package.

2 On the **General** tab, modify the properties as follows:

- Verify that "*Destination*" is selected as the **Existing Connection**.
- Select the **Destination table**. This is the subset table into which your data will be imported.
- In the **Source data file**: box, use the browse button to navigate to the location of your import file. (The **Source data file** box must display the full path name to the file.)
- Select **Specify format** and select the row and column delimiter used in your import file.

3 If your import file includes a header row, click the **Options** tab and modify the settings as follows:.

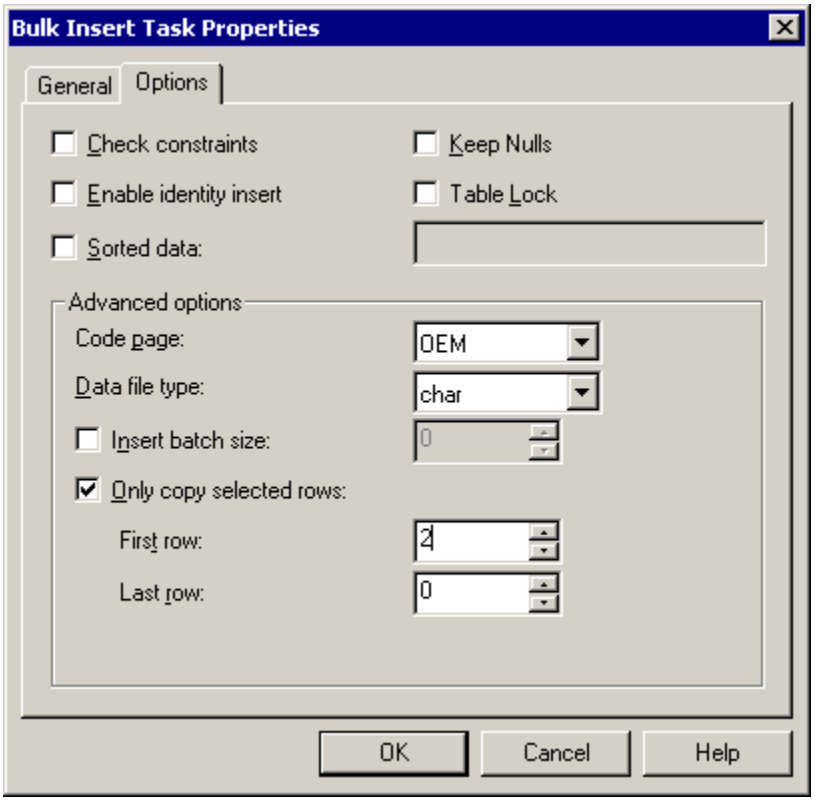

Figure 1-19 Bulk Insert Task Properties/Options tab for Subset Import From Text File Bulk DTS Package

- In the Advanced options area, check **Only copy selected rows**:
- In the **First row**: box, enter the number of the first data row.
- The **Last row**: box should be set to 0.

4 Click **OK** to close the window.

5 Modify or replace the “Custom Task” step to work with combined new and existing data.

Note: The fetch table contains all post-transfer data. All steps that manipulate this data must access that table. The name of the fetch table can be found in the global package variable “Fetch Table” which is populated during the “Transfer” step.

---

6 On the DTS Package window, click **Package/Save** to save your changes to the package.

You have completed the final setup procedures. Move on to the section entitled, “Execute package import - immediately or scheduled.”

SubsetTransferFromSQLServer DTS Package

Follow the steps below to define how your source data should travel to the destination in the SubsetImportFromSQLServer DTS Package.

1 From the DTS Package window, double-click on the **Data Transformation Task** icon.

Note: The icon is represented by the black arrow connecting the Source and Destination icons. The window shown below is displayed.

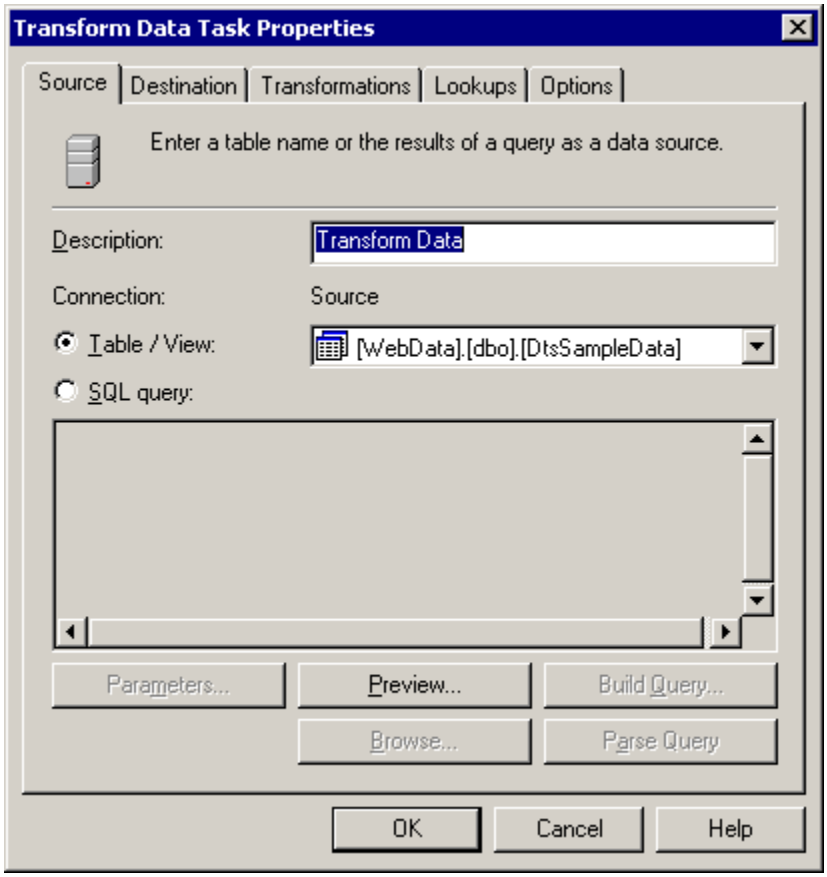

Figure 1-20 Transformation Data Task Properties window for SubsetImportFromSQLServer Package.

2 Select the **Source** tab and modify the settings as follows:

- Select a Source Connection. Choose either **Table/View** or **SQL query**.
  - If you choose **Table/View**, select the desired source table from the list box.

- If you choose **SQL query**, then you must provide the SELECT query in the text box. You can build, type or copy and paste the query into the box. All tables referenced by your query must be included in the source database.

3 Select the **Destination** tab and choose your destination table from the list. This is the table into which your source data will be imported. If the table is not shown in the list, your subset has not been properly created.

4 Click **OK** to close the Transformation Data Task Properties window.

5 Again, from the DTS Package window, double-click on the **Source** icon. The Connection Properties window, shown below is displayed.

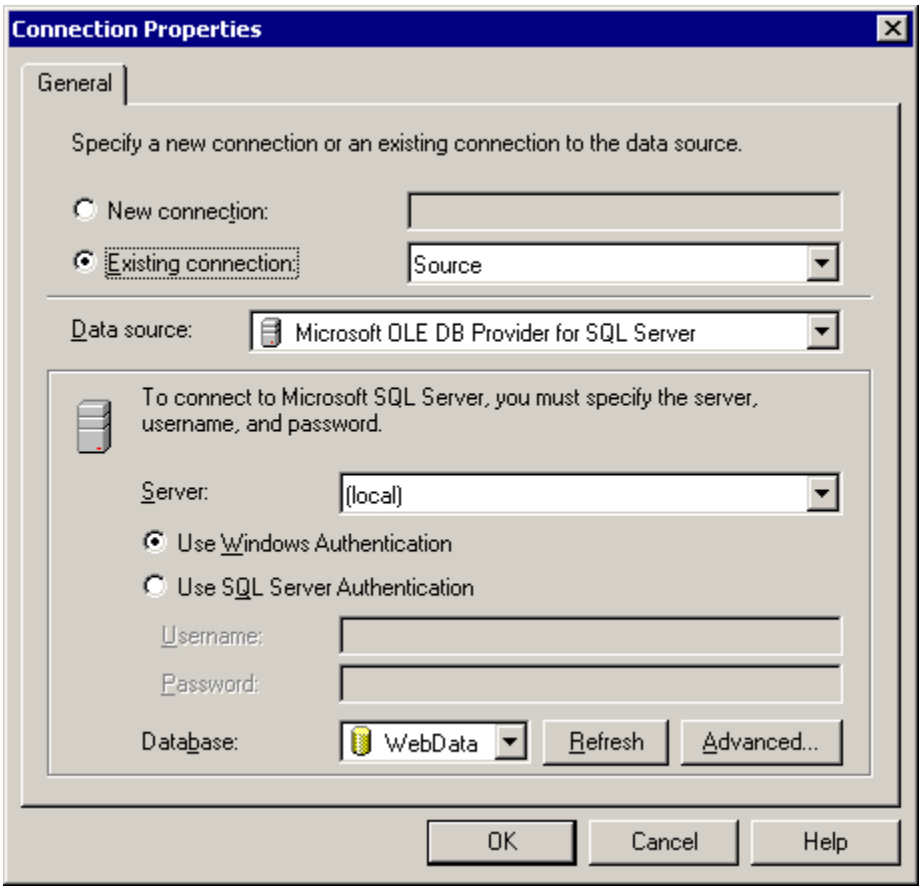

Figure 1-21 Source Connection Properties window for SubsetImportFromSQLServer Package.

- In the **Server**: box, select a server from the list box.
- Select the appropriate authentication method for the server you chose.
- Use the **Database**: list box to select the database where your source data is located.
- Click **OK**.

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6 From the Task References window, click **Select All** to delete transformations for all tasks.

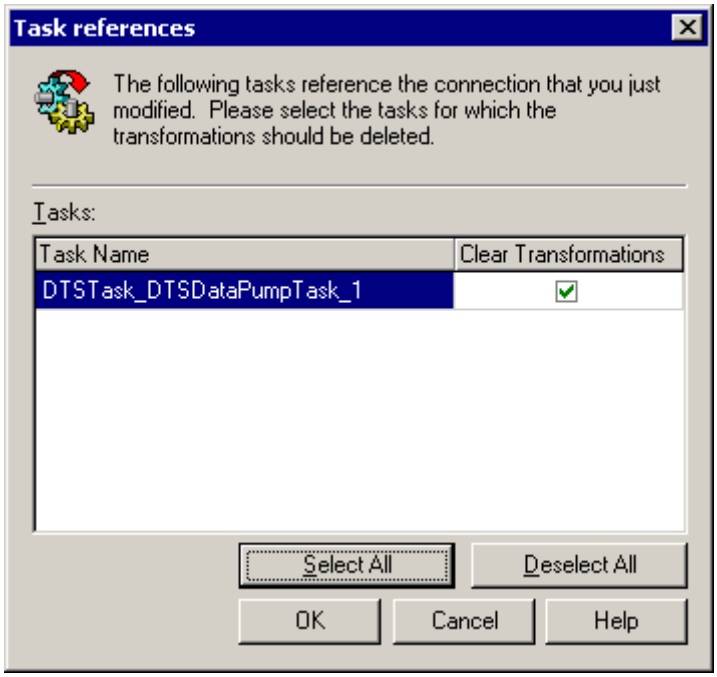

Figure 1-22 Task references window to clear all transformations for SubsetImportFromSQLServer Package.

7 Click **OK**.

8 Modify or replace the “Custom Task” step to work with combined new and existing data.

Note: The fetch table contains all post-transfer data. All steps that manipulate this data must access that table. The name of the fetch table can be found in the global package variable “FetchTable” which is populated during the “Transfer” step.

---

9 On the DTS Package window, click **Package/Save** to save your changes to the package.

You have completed the final setup procedures. Move on to the section entitled, “Execute package import - immediately or scheduled.”

SubsetTransferFromTextFile DTS Package

Follow the steps below to define the following for the SubsetImportFromTextFile DTS Package:

- how the source data should travel to the destination
- the connection to the source text file that contains the incoming data

1 From the DTS Package window, double-click on the **Data Transformation Task** icon.

Note: The icon is represented by the black arrow connecting the Source and Destination icons. The window shown below is displayed.

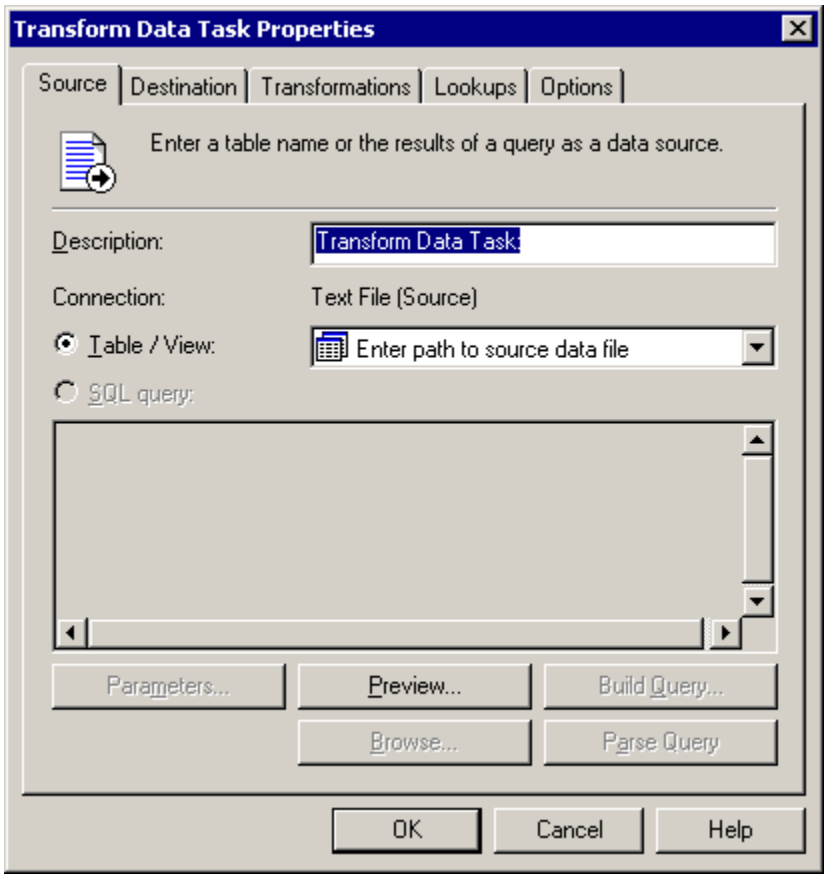

Figure 1-23 Transform Data Task Properties window for SubsetImportFromTextFile Package.

2 Select the **Source** tab and select the correct Text File (Source) connection from the list box.

3 Select the **Destination** tab and choose your destination table from the list. This is the table into which your source data will be imported. If the table is not shown in the list, your subset has not been properly created.

Note: If you encounter an error message at this point, click **OK** to close the message and continue.

---

4 Click **OK** to close the Transformation Data Task Properties window.

5 Again, from the DTS Package window, double-click on the **Text File (Source)** icon. The Connection Properties window, shown below, is displayed.

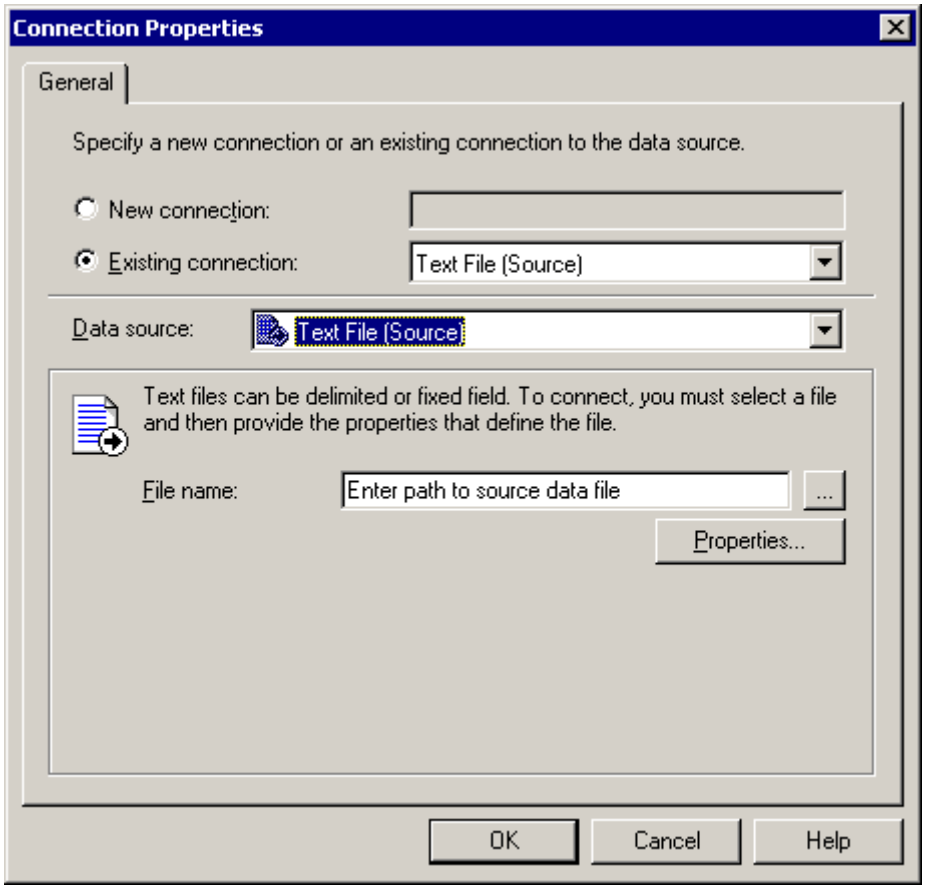

Figure 1-24 Source Connection Properties window for SubsetImportFromTextFile Package.

6 In the **File name**: box, use the browse button to navigate to the location of your import file. (The **File name** box must display the full path name to the file.)

7 Click **Properties** to open the Text File Properties window and initiate the properties wizard.

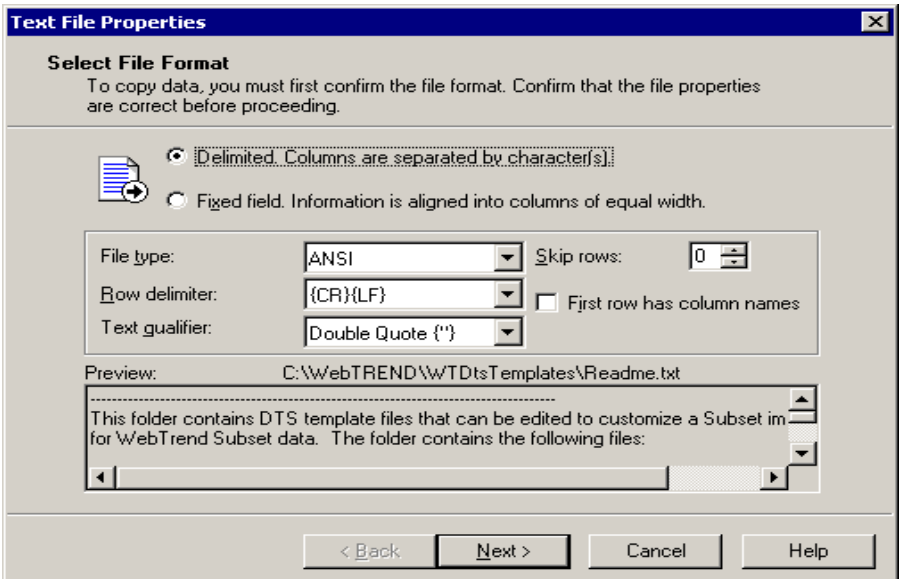

Figure 1-25 Text File Properties window for SubsetImportFromTextFile Package.

Use the Text File Properties wizard to define how your data is organized in the source file. The wizard allows you to define whether your file is delimited or fixed field, the file type, and, if application, row delimiter and text qualifiers.

- If your source file includes a header, be sure to use the **Skip rows**: box to enter the number of rows in the header.
- Click **Next** to move to the following window. Click **Back**, if necessary, to return to the previous window.
- When you have completed your properties selections, click **Finish**. You will be returned to the Connection Properties window.

8 On the Connection Properties window, click **OK** to display the Task References window.

9 Click **Select All** to delete transformations and OK to close the window.

10 Modify or replace the “Custom Task” step to work with combined new and existing data.

Note: The fetch table contains all post-transfer data. All steps that manipulate this data must access that table. The name of the fetch table can be found in the global package variable “FetchTable” which is populated during the “Transfer” step.

---

11 On the DTS Package window, click **Package/Save** to save your changes.

You have completed the final setup procedures. Move on to the section entitled, “Execute package import - immediately or scheduled.”

Execute package import - immediately or scheduled

You are now ready to run your package and import your source data to the subset you have defined in the Horizon Business Insight Subset Editor.

This section provides instructions on how to run the import process immediately and how to schedule it to run at a future date and time.

Run import immediately

A DTS package can be executed to import a file immediately as noted below.

- Navigate to the DTS Package window in **Enterprise Manager** or **Microsoft SQL Server Management Studio**, as applicable and open the selected DTS package.
- Click **Package/Execute** or click the **Execute** icon from the menu bar.

Alternatively, you can follow the steps in the next section to create a SQL Server Agent job for each of your DTS packages and then execute the job at any time.

Create an SQL Server Agent job:

Follow the steps below to create a SQL Server Agent job.

1 On the HBI database server, navigate to the following location:

Start/Programs/Microsoft SQL Server Management Studio/SQL Server Agent/Jobs

2 Right-click on **Jobs** and select **New Job** from the shortcut menu to open the General page of the New Job window.

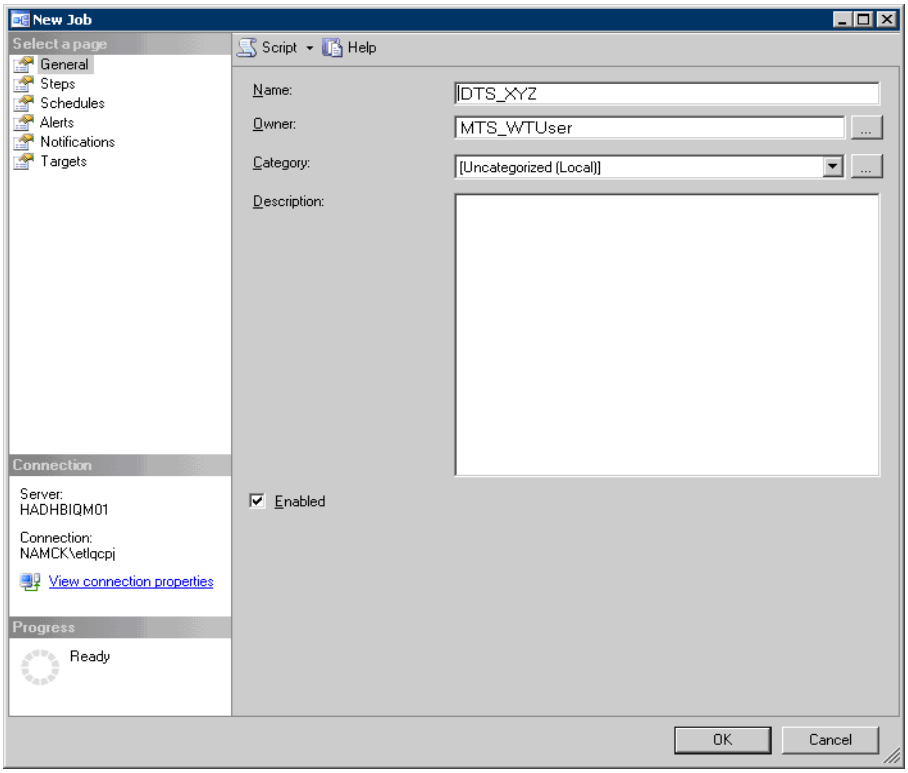

Figure 1-26 SQL Server Agent New Job window.

3 Enter a name for the job you are creating and select MTS_WTUSER from the list in the **Owner** field. Be sure that the **Enabled** checkbox is selected.

The **Category** and **Description** fields are optional.

4 From the Select a page pane on the left, click **Steps** to display the New Job Step page.

5 Enter a name for the step and select the entry shown below from the list in the **Type** field.

```
Operating System (CMDexec)
```

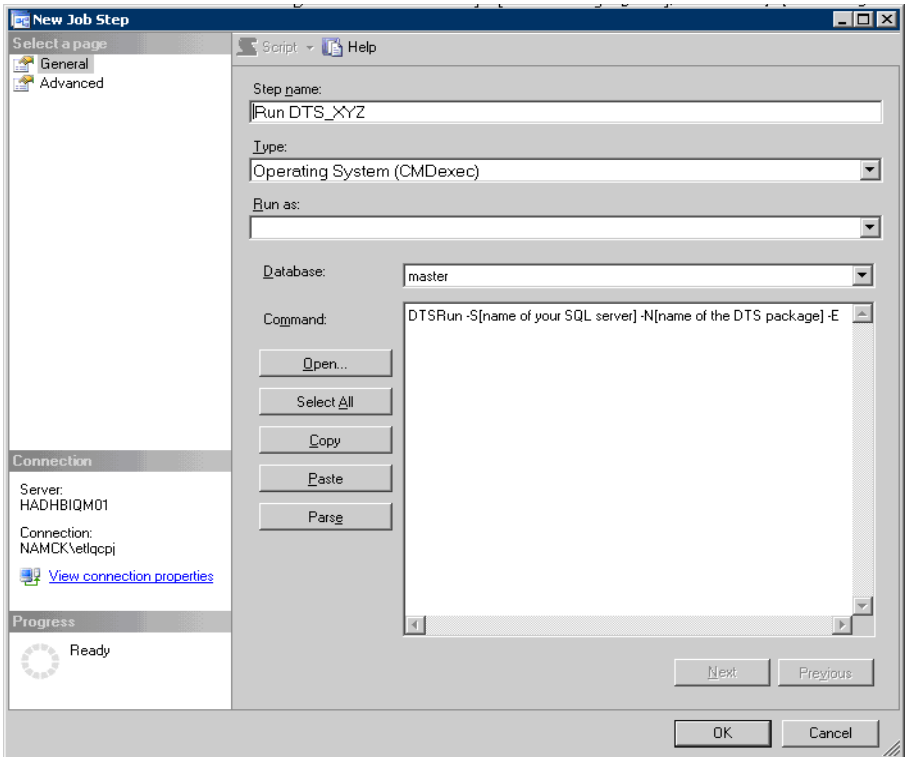

Figure 1-27 SQL Server Agent New Job Step window.

6 In the **Command** text box, type the following:

```
DTSRun /S[your SQL Server Name] /N[DTS Package Name] /E
```

Note the following:

- Be sure to enter a space before: /S, /N and /E)
- If the name of the DTS package or your server has a space, use double-quotes (“) to enclose the space(s).

7 Click **OK** to create the step and then click **OK** again to save the job.

Execute the SQL Server Agent job

Once you have created a Server Agent job for each of the DTS packages, you can execute an import for a selected DTS package at any time by following the steps below.

1 On the HBI database server, navigate to **Start/Programs/SQL Server/ Microsoft SQL Server Management Studio/Jobs**.

2 Right-click on the job you want to execute and select **Start job at step** from the shortcut menu. As the job has only a single step, you do not need to enter a step number.

3 Click **OK** to import immediately.

Schedule import

This section describes the method used to run DTS package imports based on a pre-determined schedule.

Define an SQL Servers scheduled import

The scheduling method described in this section requires you to create an SQL Server Agent job for each DTS package.

Follow the instructions below to create a new import schedule for a DTS package. You must create a schedule for each DTS package you want to run.

1 Create an SQL Server Server Agent Job.

You must create a Server Agent job if you want to run an import immediately or if you want to schedule the DTS package import. If you have already created a server agent job for your DTS packages, you can use the same job to schedule package imports.

If you have not created Server Agent jobs for each of the DTS packages, follow steps to define the job and create the step outlined in the section entitled, “Create an SQL Server Agent job:.”.

When you are done, continue with the steps below to add a schedule to an existing SQL Server Agent job.

2 In the **Select a page** panel on the left of the Server Agent Job window, click **Schedules**, then **New** to display the window below.

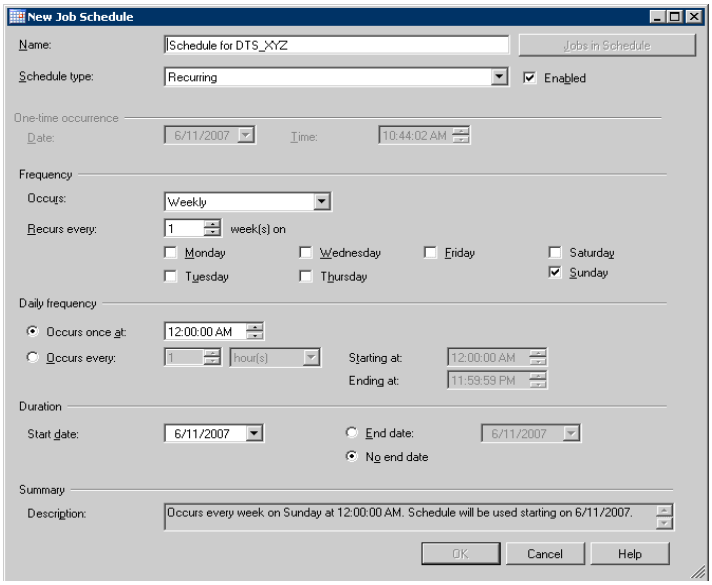

Figure 1-28 SQL Server Agent Scheduler window.

3 Enter a name for your scheduled job in the Name field.

4 Define your import schedule by completing the occurrence, frequency and duration selections

5 Click **OK** to save the schedule as part of the Server Agent job.

View all scheduled jobs

Once you have scheduled all of the DTS packages to run, it is important to manage these and any other SQL jobs to avoid scheduling conflicts that may cause delays in processing.

You can view all SQL Server Agent jobs as follows:

1 On the HBI database server, navigate to **Start/Programs/Microsoft SQL Server/SQL Server Management Studio**.

2 Right-click on **Jobs** and select **Manage Schedules** from the shortcut menu.

3 Select **Properties** if you want to edit the schedule.

Horizon Business Insight DTS Import Schedule Highlight

The **Horizon Business Insight DTS Import Schedule** highlight allows you to view the date and time of the next scheduled run of all DTS packages on the HBI server. The highlight is automatically populated with data collected from the DTS schedule table.

The **Horizon Business Insight DTS Import Schedule** highlight includes the following dimensions and measures.

Horizon Business Insight DTS Import Schedule	
Highlight Dimensions	Highlight Measures
Name	NextRun
	NextTime

Users must be granted access to this highlight from the Horizon Business Insight Administrator site in order to view it.

The **Horizon Business Insight DTS Import Schedule** highlight is system generated and cannot be accessed and modified in the Highlight Editor.

Appendix A: Migrating DTS packages to a new environment

Microsoft has indicated that errors may be encountered when attempting to open and/or edit new or existing DTS packages in a SQL Server 2005 or SQL Server 2008 environment. In order to prevent these errors, you must update your SQL server environment.

More information related to both SQL Server 2005 and SQL Server 2008 environments can be found at the URL below:

support.microsoft.com/kb/917406

This following section describes the information provided by Microsoft to assist you in resolving these environment issues. This information applies to:

- new DTS packages you create in SQL Server 2005 or in SQL Server 2008.
- existing DTS packages created and saved in SQL Server 2000 including any existing DTS packages associated with STAR Key Performance Indicators.

The specific tasks you must perform differ depending on whether your are running Horizon Business Insight in a SQL Server 2005 or a SQL Server 2008 environment. Be sure to read the portion of this section that is appropriate to your database environment.

DTS Migrations in a Microsoft SQL Server 2008 environment

Customers who intend to use DTS packages in a Microsoft SQL Server 2008 environment must perform certain procedures to install additional support for DTS packages. For more information, refer to the Microsoft article at the URL below:

http://technet.microsoft.com/en-us/library/ms143755.aspx

The Microsoft article at the link above is provided for information purposes only. You do not need to complete all the steps noted in the Microsoft article. Certain portions of the procedures have already been completed, by default, during the installation of your SQL Server 2008 software.

Follow the steps in this section to update your SQL Server 2008 environment as necessary for use with DTS.

Note: If you are running Horizon Business Insight in a SQL Server 2005 environment, move on to the following section for the steps necessary to update your environment.

Install run-time support for Data Transformation Services packages

SQL Server 2008 does not install run-time support for DTS packages. Before you can run and manage DTS packages, you must perform the following procedure.

1. From the Microsoft website, download the following:

   Microsoft SQL Server 2005 Backward Compatibility Components X64 package *(SQLServer2005_BC_x64.msi)*

   This download can be accessed from the *Microsoft SQL Server 2008 Feature Pack, April 2009* page at the following Microsoft address:

   http://www.microsoft.com/downloads/details.aspx?familyid=B33D2C78-1059-4CE2-B80D-2343C099BCB4&displaylang=en

2. Run the executable to install the files on the database server.
3. On the Feature Selection window, click on the arrow to select and install all of the following:
   - Data Transformation Services 2000 runtime
   - SQL Distributed Management Objects
   - Replication component
   - SQL virtual Device Interface
   - Decision Support Objects
4. Click Next to continue.
5. Click Install.
6. Click Finish.

Install design-time support for Data Transformation packages

SQL Server 2008 does not install design-time support for DTS packages. You must perform the following procedure.

1 From the Microsoft website, download the following:

SQLServer2005_DTS.msi

This download can be accessed from the *Feature Pack for Microsoft SQL Server 2005 - December, 2008* at the following Microsoft address:

http://www.microsoft.com/downloads/details.aspx?FamilyID=536fd7d5-013f-49bc-9fc7-77dede4bb075&displaylang=en

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IMPORTANT: Click the **Download** button; do not download via the hyperlink on the *Feature Pack* page.

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2 Run the executable to install the files on the database server.

3 Reboot the database server.

Copy .dll files to a new location on the database server

After you have completed the procedures above and rebooted the HBI database server, follow the steps below to ensure that the DTS designer can be used in SQL Server Management Studio.

Copy the files noted in the table below to the location on the database server indicated in the table below.

1.	Copy these files:	SEMSFC.DLL, SQLGUI.DLL, SQLSVC.DLL
	From this folder:	ProgramFiles(x86)\Microsoft SQL Server\80\Tools\Binn
	To this folder:	ProgramFiles(x86)\Microsoft SQL Server\100\Tools\Binn\ VSShell\ Common7\IDE
2.	Copy these files:	SEMSFC.RLL, SQLGUI.RLL, SQLSVC.RLL
	From this folder:	ProgramFiles(x86)\Microsoft SQL Server\80\Tools\Binn\ Resources\[*lang_id*]
	To this folder:	ProgramFiles(x86)\Microsoft SQL Server\100\Tools\Binn\ VSShell\ Common7\IDE\Resources\[*lang_id*] (e.g., for U.S.English, the land_id subfolder is “1033”.)

You can now open the DTS package(s) and make your modifications.

Reschedule existing SQL Server Agent jobs

Customers migrating DTS packages to a new Microsoft SQL Server 2008 environment should note that all previously existing SQL Server Agent jobs including those scheduled to run DTS packages created and saved in SQL Server 2000 must be recreated after you have moved the packages to your SQL Server 2008 environment.

DTS Migrations in a Microsoft SQL Server 2005 environment

Customers who intend to use DTS packages in a Microsoft SQL Server 2005 environment must perform certain additional procedures to install additional support for DTS packages.

Follow the steps in this section to update your SQL Server 2008 environment as necessary for use with DTS. If you have already completed any of the procedures below during the implementation of your SQL Server 2005 environment, you do not need to do so again.

Note: If you are running Horizon Business Insight in a SQL Server 2008 environment, this section does not apply to you. Follow the steps in the previous section to update your environment.

Install design-time support for Data Transformation packages

SQL Server 2005 does not install design-time support for DTS packages. You must perform the following procedure.

1 From the Microsoft website, download the following:

SQLServer2005_DTS.msi

This download can be accessed from the *Feature Pack for Microsoft SQL Server 2005 - December, 2008* at the following Microsoft address:

http://www.microsoft.com/downloads/details.aspx?FamilyID=536fd7d5-013f-49bc-9fc7-77dede4bb075&displaylang=en

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2 Run the executable to install the files on the database server.

3 Reboot the database server.

File modification required for SQL Server 2005

The following steps must be performed by customers with a SQL Server 2005 environment before you can edit your DTS packages.

Note: The following information contains steps to modify a file on your HBI database server. It is essential that you back up the file before you modify it.

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1 Navigate to the location shown below:

x:\Program Files(X86)\Microsoft SQL Server\90\Tools\Bin\VSShell\Common7\IDE folder

(*where x represents the drive letter where SQL Server 2005 is installed.*)

2 In the IDE folder, locate the **Sqlwb.exe.manifest** file and open it in Notepad or other text editor.

3 Remove the lines of code shown below from the **Sqlwb.exe.manifest** file.

```
<dependency>
<dependentAssembly>
<assemblyIdentity type="win32" name="Microsoft.Windows.Common-
 Controls" version="6.0.0.0" processorArchitecture="x86"
 publicKeyToken="6595b64144ccf1df" language="*"></assemblyIdentity>
</dependentAssembly>
</dependency>
```

4 Save the changes to the file and exit the text editor.

You can now open the DTS package(s) in SQL Server 2005 and make your modifications.

Exisiting scheduled jobs for DTS packages

Customers migrating DTS packages to a new Microsoft SQL Server 2005 environment should note that scheduled jobs for DTS packages that were created and saved in SQL Server 2000 still exist.

These jobs will run as previously scheduled. You do not need to recreate these scheduled jobs.