Performance Analytics

Powered by Horizon Business Insight

Installing HBI in a Microsoft Windows 2008 Server Environment

Release 15.0
April 2010

Product

Horizon Business Insight Release 15.0

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Chapter 1: Before you Begin

This manual provides information and instructions for Horizon Business Insight^{TM} customers who are installing Horizon Business Insight for the first time in a Microsoft Windows 2008 (64-bit) Server environment with Microsoft SQL Server 2008.

Important Installation Information

Before you begin, please read this chapter in its entirety. Once you have done so, follow the instructions section by section in the order presented in this document, unless otherwise instructed.

Horizon Business Insight environment types

This book provides instructions for the following types of environments:

- <u>Single server environment</u> - Customers who intend to run Horizon Business Insight in a single server environment have the Horizon Business Insight software and the Microsoft SQL 2008 Server software installed on the same Windows 2008 server (referred to as the Horizon Business Insight or HBI server or the application server).

- <u>Multi-server environment</u> - Customers who intend to run Horizon Business Insight in a multi-server environment have the Horizon Business Insight software installed on a Windows 2008 server (referred to as the Horizon Business Insight server or the application server). The Microsoft SQL 2008 Server software is installed on a different Windows 2008 server (referred to as the SQL or database server).

As you proceed through the instructions in this book, be sure to perform the instructions for your environment type.

Important information for multi-server installations

McKesson recommends that you have <u>both</u> the application server and the SQL database server booted up and running throughout the entire installation process described in this document.

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Software CDs

The following software CDs or downloads are required to install your Horizon Business Insight system. Refer to the applicable section of this document for additional information related to associated service packs and hot fixes.

- Windows 2008 Server (Standard or Enterprise Edition) Service Pack 2
- Microsoft SQL Server 2008 (Standard or Enterprise Edition) Service Pack 1
- You must have downloaded the current release of the Horizon Business Insight software from the McKesson Download Central website. Verify that the you have downloaded the executable for Windows 2008 installations. Be sure you know the network location where the software was stored after the download process.

IMPORTANT! Installation location for HBI software components

If you intend to install the HBI software components listed below on a server drive other than the C: drive, you must have the required information available before you begin the installation process.

- WebTREND folder (drive letter and data path required)
- COM+ components (drive letter and application path required)
- HBI Websites (drive letter and web sites path)
- JBoss software (drive letter and files path)

The components listed above can be installed on the same drive or on different drives on the Horizon Business Insight server as desired by your organizational security policies.

During the installation process, you will be prompted to provide the installation drive letter and the associated path for each of the items listed above. You cannot create the folder structure to which you want to install when you are prompted. You must create the folder structure prior to the installation so that you can browse to the location during the applicable install procedure.

> **Note:** It is important that you follow the installation instructions for the server and the related components in the order in which they are presented in this manual.

Networking and system information

The networking and system information listed below is usually provided by the customer on the Horizon Business Insight Technical Information Checklist.

<u>Important</u>: Do not proceed unless you have all of the following information. The information listed is needed in the first steps and, in some cases, changes cannot be easily made after these steps have been completed.

- Facility Name
- Licensing Scheme and CALs for both Windows 2008 and SQL 2008
- Host Name
- Time Zone
- IP Address
- Subnet Mask
- Default Gateway
- DNS Servers (if applicable)
- WINS Servers (if applicable)
- DNS Domain Name (if applicable, e.g. amherst.hboc.com)
- Host Name or IP address of Feeder System (TRENDSTAR or Horizon Performance Manager)
- Password for the Local Administrator account

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Related Horizon Business Insight technical documents

This section describes the documents related to installing, upgrading, migrating and configuring your Horizon Business Insight system that are available with this release. A zip file containing all documents for the current Horizon Business Insight release can be downloaded from the McKesson Download Central website.

Before you begin the installation procedures described in this document, be sure you are using the correct guide for your needs. The document you are currently viewing is shown in ***bold*** in the table below.

Name	Description
Installing HBI in a Microsoft Windows 2008 Server Environment	Instructions for installing Windows 2008, Microsoft SQL 2008 and the HBI software components for the first time in a single-server or multi-server environment
Installing HBI in a Microsoft Windows 2003 Server Environment	Instructions for installing Windows 2003, Microsoft SQL 2005 and the HBI software components for the first time in a single-server or multi-server environment
Upgrading Horizon Business Insight in a Windows 2003 Environment	Instructions for upgrading an existing single or multi-server HBI system that is actively running the previous HBI release in a Windows 2003 environment with Microsoft SQL 2005.
Migrating your Horizon Business Insight System to a New Environment	Instructions and information about migrating your existing Horizon Business Insight 11.2 or 14.0 system to a new environment
Optional Configuration Guidelines for Horizon Business Insight The chapters in this guide were previously included as appendices in the HBI Installation and Upgrade Guide	Instructions and information about the following: • Browser Settings • Installing Java Runtime Client • Horizon Business Insight Server Configuration window • Using the Support Page • Configuring the Horizon Portlets for use with the Horizon^{WP} Physician Portal • Loading the HPM_System_ Monitoring_Statistics script • Changing the HBI splash screen • Setting MIME types mapping • Create a local FTP account • Activating SSL • Configure Multi-Entity Root Folder functionality • User Authentication and Passwords • Backup and Restore Guidelines

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Chapter 2: Supported Environment

This chapter describes the validated server hardware and software requirements for customers running Horizon Business Insight 15.0 in a Microsoft Windows 2008 server environment.

IMPORTANT: If you intend to run Horizon Business Insight 15.0 in a Microsoft Windows 2003 Server environment, do not use the instructions in this book. Instead, follow the instructions provided in the document entitled, *Installing Horizon Business Insight in a Microsoft Windows 2003 Server Environment.*

Hardware and software

The list below reflects the hardware and software required to properly run your Horizon Business Insight system in a Windows 2008 environment.

- Microsoft Windows 2008 (Standard or Enterprise Edition) Service Pack 2 (*64-bit server only*).

   Windows 2008 R2 is <u>not</u> supported with Horizon Business Insight 15.0.

- Microsoft SQL Server 2008 (Standard or Enterprise Edition) SP1.
- IIS 6.0 and IIS 7.0

   (Do not include IIS Sample Code with IIS installation. It is considered a security risk.)

- Terminal Services (Preferred Administrative Mode required)
- Internet Explorer 6.0SP2, 7.0 or 8.0; Firefox 3.5

   Refer to the chapter on browser issues in the document entitled, *Optional Configuration Guidelines for Horizon Business Insight* for additional information.

Important notes

Be sure to note the following about the Horizon Business Insight environment:

- In order to properly complete the processes described in this guide you must use either the Windows Server Local Administrator account or a new fully-privileged Windows account that you create specifically for this purpose. For more information, see "Determine your Windows Software Install Account" on page 3-10.
- Multi-server customers must install Windows 2008 on the database server as well as the application server.

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Chapter 3: Install Operating System and Services

This section provides you with the information you need to properly install the Windows 2008 operating system and related services on your Horizon Business Insight server(s).

IMPORTANT: If you intend to run Horizon Business Insight 15.0 in a Microsoft Windows 2003 Server environment with Microsoft SQL Server 2005, do not use this document to install Horizon Business Insight 15.0. Instead refer to the document entitled, *Installing Horizon Business Insight in a Microsoft Windows 2003 Server Environment.*

The following topics are discussed in this chapter.

Topic	See Page
Install Windows 2008 Server, Service Pack 2	3-2
Additional operating system security patches	3-3
Internet Information Services (IIS)	3-4
Set Regional Options on the server (for US and UK)	3-7
Determine your Windows Software Install Account	3-10

You must perform all of the procedures described in this chapter before you install the Horizon Business Insight 15.0 software on your server(s).

Install Windows 2008 Server, Service Pack 2

The Windows 2008 server installation process can vary greatly from system to system. This section is designed to help you successfully complete the process.

Be sure to run a Microsoft compatibility check on your server and review the hardware recommendations to verify that your hardware is up to date. Note that Microsoft Window 2008 R2 is <u>not</u> compatible with Horizon Business Insight 15.0.

If you have any problems during the installation of Windows 2008 Server, contact your hardware manufacturer (HP, IBM) or Microsoft for assistance.

During the installation of Windows 2008 Server, you may be prompted to install additional software or configure your server in various ways, note the guidelines below:

- Do *not* make the server a domain controller, additional domain controller, child domain, domain tree or forest.

- Do *not* set up the Windows 2008 Server Terminal Services in an Application Mode.

- Windows 2008 automatically installs Terminal Services. You can enable the Remote Desktop feature which allows your System Administrator to remotely administer this server.

- If you install additional Windows 2008 options, note that additional resources, memory and CPU time may be required.

Procedures

Step	Task
1	Install Windows 2008 Server. Use the Windows 2008 CD that was provided with your server to install the operating system. Follow the instructions provided by Microsoft to do so.
2	Apply Windows 2008 Service Pack 2. Go to the Microsoft website at www.microsoft.com and download Windows 2008 Service Pack 2 and apply the service pack to the server.

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Additional operating system security patches

The current release of the Horizon Business Insight software has been validated against critical Windows security and hot fix patches received from Microsoft through the date of the software release. Windows patches and hot fixes are available from Microsoft.

If you choose to apply other Microsoft service packs, patches or fixes, you do so with the understanding that Performance Analytics Customer Support Center continues to troubleshoot and escalate, as necessary, any issue that may arise in the customer environment. Under these circumstances, however, additional time may be required to identify a satisfactory solution. Therefore, we strongly recommend that you take every precaution by backing up your server in the event that the resolution takes longer than you can keep your system unavailable for production. McKesson attempts to validate critical patches, service packs and hot fixes as soon as possible.

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Internet Information Services (IIS)

Windows 2008 does not automatically install the necessary IIS components on your server. This section provides you with the information you need to do so.

> **Note:** If you are using FTP to transfer files to HBI from TRENDSTAR, refer to the document, *Using Horizon Business Insight with TRENDSTAR*. The section of that document entitled, "FTP Export Setup for Highlight and Report Files" provides specific information for TRENDSTAR systems that is *not* included in the instructions below.

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Install IIS components

The tasks in the table below include the installation of IIS 6.0 and IIS 7.0. Both versions are necessary for use with Windows 2008 Server. IIS 6.0 components are used to manage services such as FTP, SMTP and fulfull other backward compatibility requirements. IIS 7.0 components are used for web server requirements.

Note to multi-server customers: Follow the instructions in this section on your HBI application server only.

Step	Task
1	From the Windows **Start** menu, select **Control Panel/Administrative Tools.**
2	Open Server Manager and locate the Roles Summary.
3	Select WebServer (IIS).
4	Click **Add Roles** and then click **Next.**
5	Verify that **WebServer IIS** is selected and then click **Next**.
6	On the Role Services window, verify that all of the *Web Server*, *Management Tools* and *Windows Process Activation Service* items listed below are selected. If they are not, select them now.

<table>
<tr><td colspan="2" align="center">Web Server</td></tr>
<tr>
<td>

Common HTTP Features

-Static Content
-Default Document
-Directory Browsing
-HTTP Errors
-HTTP Redirection

Application Development

-ASP.NET
-.NET Extensibility
-ASP
-CGI
-ISAPI Extensions
-ISAPI Filters
-Server Side Includes
</td>
<td>

Health and Diagnostics

-HTTP Logging
-Logging Tools
-Request Monitor
-Tracing
-Custom Logging
-ODBC Logging

Security

-Basic Authentication
-Windows Authentication
-Request Filtering
-IP and Domain Restrictions

Performance

-Static Content Compression
</td>
</tr>
</table>

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Step	Task	

6 cont.	**Management Tools**
	
	• IIS Management Console
	
	• IIS Management Scripts and Tools
	
	• IIS 6 Management Compatibility
	
	    -IIS 6 Management Console
	    -IIS 6 Metabase Compatibility
	    -IIS 6 WMI Compatibility
	    -IIS 6 Scripting Tools
		Windows Process Activation Service
		
		• Process Model
		
		• .NET Environment
		
		• Configuration APIs
		
		Note: The roles above are dependent features which are automatically included in the IIS roles installation. You do not have to specifically select them during the installation.

7	When you have completed the verification and selection in the previous step, click **Add Features** and then select **SMTP Server**.	
8	Click **Add Required Features** and then click **Next.**	
9	Click **Install.**	

Move on to the next section in this chapter.

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Set Regional Options on the server

All new Horizon Business Insight customers must follow the instructions provided below upon initial installation of your Horizon Business Insight system.

Note to Multi-server customers: Regional Options must be set on the HBI application server and on the SQL database server.

Horizon Business Insight requires that the short date setting be used. Only the following regional settings are supported.

English (United States) - MM/dd/yyyy   Location: United States

English (United Kingdom) - dd/MM/yyyy Location: United Kingdom

There are two sets of instructions in this section.

- HBI servers with English (United States) as the regional setting
- HBI servers with English (United Kingdom) as the regional settings.

Follow the steps in the section to establish the regional and location settings appropriate for your server.

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Set English (United States) regional options - US Customers

Step	Task
1	From the Windows menu, select **Start/Settings/Control Panel.**
2	Select **Regional and Language Options**.
3	Select the setting for the tabs shown below to configure a United States (US) server:

Tab	Options	US Servers
Formats	Current format and Short dates	English (United States) MM/dd/yyyy
Location	Current Location	United States

Step	Task
4	Click **OK** to close the Regional and Language Options window.
5	Close the Control Panel.

Move on to the next chapter in this document.

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Set English (United Kingdom) regional options - UK Customers

Step	Task
1	From the Windows menu, select **Start/Settings/Control Panel.**
2	Select **Regional and Language Options**.
3	Select the Regional Options tab, select the following: • Formats: Select *English (United Kingdom)* • Location: Select *United Kingdom* <table><tr><td>**Tab**</td><td>**Options**</td><td>**UK Servers**</td></tr><tr><td>Formats</td><td>Current format and Short dates</td><td>English (United Kingdom dd/MM/yyyy</td></tr><tr><td>Location</td><td>Current Location</td><td>United Kingdom</td></tr></table>
4	Select the Keyboards and Languages tab: • Click **Change Keyboard**. • Select the General tab. • Click **Add** and choose the following: *English (United Kingdom).* • Click **Apply**.
5	In the Default input language area select: *English (United Kingdom) - UK.* In the Installed services area, highlight *English (United States)* and click **Remove.**
6	Select the Administrative tab: • Click **Change system locale**. • Select *English (United Kingdom)* • Click **Apply**.
7	Still on the Administrative tab, click on **Copy to reserved accounts** • Place a checkmark next to the following: - **Default user account (new users)** and - **System accounts (local system, local service, and network service)**. • Click **OK** then click **Apply**.
8	If prompted to reboot the server, click **Yes**. Otherwise, move on to the next chapter.

Determine your Windows Software Install Account

The Windows 2008 Server software includes strengthened security rules. As a result, before you continue, you must determine the Windows account you intend to use for the following server-related activities:

- procedures to install the Horizon Business Insight software and components.

- procedures used to support your Horizon Business Insight software, i.e., in a situation where a McKesson Support Representative is authorized by your organization to use remote desktop software to access your HBI server in order to assist you with an issue.

Choose from the the options below. If you use an account other than those noted below for HBI software installation or McKesson Support purposes, you will encounter installation isues and your HBI software may not run properly.

- Use the Local Administrator account

  This is an fully-privileged account provided with your Windows 2008 Server software. If you choose this option, it may be necessary to provide the password for your Local Administator account to McKesson Implementations and Support representatives. The need to do so may represent a security issue within your organization. If this is a concern in your organization, choose the option below.

- Create a new HBI Administrator account

  You can create a new Windows Server account specifically for the purposes described above. If you choose this option, you must provide the password for this account to McKesson Implementations and Support representatives, if necessary.

  If you choose this option, you must create the new Windows Server account now. Do not continue with the procedures in the remaining chapters in this document until you have done so.

  Important: Multi-server customers must create and configure the new acount on both servers.

  Create and configure new Windows HBI Administrator account

  When you create this account, configure it as shown below. The account should be named: *HBIAdmin*.

  - Assign the *HBIAdmin* account to the Windows Local Administators group
  - When you install the SQL Server software, add the *HBIAdmin* account to the SQL logins
  - Modify the *Local Security Policy/Local Policies/Security Options* for the *HBIAdmin* account. You must scroll down to the *User Access Control Policies* noted below and set the options as indicated:

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- **Run all administrators in Admin Approval mode** = *Disabled*
- **Behavior of the elevation prompt for administators in admin approval mode** = *Elevate without prompting.*

Once you have made the modifications, reload the policies.

Warning: You must reboot your server now. Do not continue until you have done so. If you do not reboot, the installation of the HBI components will not complete successfully.

Once the server has rebooted, log back into the server using the domain or local administrator account and move on to the next chapter in the document.

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Chapter 4: Install Microsoft SQL Server

This chapter provides you with the information you need to install Microsoft SQL Server 2008 and Service Pack 1 and properly configure the software to run your Horizon Business Insight system.

Only those settings that are required to run Horizon Business Insight are described in this section. For additional installation information, contact Microsoft directly.

The following topics are discussed in this chapter.

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Install Microsoft SQL Server 2008

This section provides information for customers installing the Microsoft SQL Server 2008 software for the first time.

In order to install the Microsoft SQL Server 2008 software to properly run Horizon Business Insight 15.0, accept all defaults during the installation process EXCEPT those on the windows noted in the table below.

Note to installing Multi-server customers: The Microsoft SQL Server 2008 software and Service Pack 1 must be installed on your HBI database server.

Important: In order to install your SQL Server software, you must be logged into the server with the domain or local administrator account. If you created a new Windows *HBIAdmin* account for use in installing the HBI software and components, do not log in as *HBIAdmin* for the procedure in this chapter.

Window Name	Required Selection
SQL Server Installation Center	New SQL Server stand-alone installation or add features to an existing installation.
Product Key	Enter the product key.

Feature Selection	Instance Features:
	
	• Database Engine Services
	
	  • SQL Server Replication
	
	  • Full-Text Search
	
	Shared Features
	
	• Business Intelligence Development Studio
	
	• Client Tools Connectivity
	
	• Integration Services
	
	• Client Tools Backwards Compatibility
	
	• SQL Server Books Online
	
	• Management Tools - Basic
	
	  • Management Tools - Complete

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Window Name	Required Selection
Server Configuration/ Service Account tab	Service (Startup Type) • SQL Server Agent (Automatic) • SQL Server Database Engine (Automatic) • SQL Server Integration Services 10.0 (Automatic) • SQL Full-text Filter Daemon Launcher (Manual) • SQL Server Browser (Automatic)
Server Configuration/ Collation tab (US Servers) _____ Collation Designator on United Kingdom (UK) servers	For Database Engine, click **Customize** and select: SQL_Latin1_General_CP1_CS_AS UK - Accept default setting of Latin1_General with a sort order of Accent Sensitive (See Additional steps for UK customers following this table.)

Database Engine Configuration/ Account Provisioning tab	Authentication Mode: Select Mixed Mode (SQL Server authentication and Windows authentication)
	• An sa logon password is required. Set a password now.
	• Click **Add** to Specify SQL Server administrators
	   - Click Locations and choose Local
	   - For Object names, add Administrators and add *HBIAdmin* if you have created this account..

Ready to Install	Review the summary and information displayed on this window, then click **Install**.
Complete	Review the summary log and information displayed on this window.

IMPORTANT: When you have completed, the installation of the Microsoft SQL Server 2008 software, you must reboot the server.

Once you have rebooted the server, move on to the section entitled, Apply Microsoft SQL Server 2008 Service Pack 1.

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Additional steps for United Kingdom customers only

Once you have completed the installation of Microsoft SQL Server 2008, UK customers must follow the additional steps below.

Note: Be sure to log into the server using the SQL Server *sa* account. If you are logged on as a server or domain administrator, the values will revert to the default when the server is rebooted.

Step	Task
1	On the SQL server, navigate to the following location: **START/ Programs/Microsoft SQL Server 2008/SQL Server Management Studio**.
2	On the Connect window, log in using the SQL Server sa account.
3	Click **New Query** to open a query window. • Type the following into the window: `sp_configure 'default language',23` `RECONFIGURE with override` (*case-sensitive*) • Click **Execute**.
4	Click **New Query** again: Type the following into the new window: `sp_defaultlanguage sa, 'British'` • Click **Execute**.
5	Close the query windows and exit the SQL Server Management Studio.
6	Reboot the SQL server.
7	Run the SQL Query Tool, using the following commands to verify that the parameters shown are correct: <table><tr><th>SQL command</th><th>Required parameters</th></tr><tr><td>print@@language</td><td>Language=British</td></tr><tr><td>print@@langid</td><td>LangID = 23</td></tr></table>

Once you have completed the steps above, move on to the section entitled, Apply Microsoft SQL Server 2008 Service Pack 1.

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Apply Microsoft SQL Server 2008 Service Pack 1

In order to complete the installation of Microsoft SQL Server 2008, all HBI database servers must be running Microsoft SQL Server 2008 Service Pack 1.

Before you begin

The instructions in this section require that you download Microsoft SQL Server 2008 Service Pack 1 from the Microsoft website at www.microsoft.com and run the executable file. If you have not already downloaded the service pack, you must do so now.

Apply Microsoft SQL Server 2008 Service Pack 1

During the installation, accept all defaults EXCEPT on those windows listed in the table below.

Window name	Required selection
Ready to Install	After you click **Install** to begin the update, you may be prompted to reboot the server. Click **OK** to do so.
Additional Information	<u>Deselect</u> the box to **Launch the User Provisioning Tool for Windows Vista after SP2 installation completes**.

When you have completed the update, perform the following actions:

- Reboot the HBI database server.
- After you have restarted the server, be sure to navigate to Microsoft SQL Server Management Studio and run an SQL version check.

The proper version for SQL Server 2008 SP1 must indicate the version (10.00) and include notation of service pack 1 (SP1) as shown in the example here:

```
10.00.XXXX SP1 dated Mar 29, 2009 or later
```

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Configure Microsoft SQL Server 2008 SP1 for Horizon Business Insight

Once you have installed Microsoft SQL Server 2008 and applied Service Pack 1, you must configure the SQL Server 2008 settings as described in this section.

Set Autostart SQL

Step	Task
1	Navigate to **START/Programs/Microsoft SQL Server 2008/ Configuration Tools/SQL Server Configuration Manager**.
2	Highlight **SQL Server Services** and select **SQL Server (MSSQLServer)**. • Right-click and select **Properties** from the shortcut menu. • Click on the Service tab and select **Start Mode**. • From the dropdown list, verify that **Automatic** is selected (correcting the setting, if necessary) • Click **Apply**.
3	Select the Logon tab and in the Built-in Account area, select Local System. • Click **Apply.** • Click **Start.** • Click **OK**. .
4	Repeat Steps 2 and 3, selecting **SQL Server Agent** from the shortcut menu in step 2.
5	Repeat Steps 2 and 3 again, selecting **SQL Server Browser** from the shortcut menu in step 2.
6	Click **OK** to save the configuration and move on to the section below.

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Set MSSQL Server protocols

Step	Task
1	Continuing from the steps above, in the tree-view, select the **SQL Server Network Configuration/Protocols for MSSQL Server.**
2	Right-click on each of the following, in turn, and and verify that the option is enabled (correct the setting, if necessary). • Named Pipes • Shared Memory • TCP/IP
3	Click **OK**.
4	Close the **SQL Server Configuration Manager**.
5	Restart the SQL Server service and then move on to the steps below.

Set database recovery option

Step	Task
1	Navigate to **Start/Programs/Microsoft SQL Server 2008/Microsoft SQL Server Management Studio** and connect to the server.
2	Expand the tree view in the left pane and select **Databases/System Databases**. • Right-click on **Model.** • From the shortcut menu, choose **Properties.**
3	On the Model Properties window: • Select the Options tab. • Under Recovery Model, select **Simple** and then click **OK**.
4	Close the **SQL Server Management Studio**.

You have completed the instructions in this chapter. Move on to the next chapter in this book entitled, Install Horizon Business Insight Software Components.

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Chapter 5: Install Horizon Business Insight Software Components

Introduction

This chapter provides information necessary for all customers installing the Horizon Business Insight 15.0 software for the first time in a single-server or a multi-server environment.

<u>Single server environment</u> - An environment with the Horizon Business Insight software and the Microsoft SQL 2008 software installed on the same Windows 2008 SP2 server.

<u>Multi-server environment</u> - An environment with the Horizon Business Insight software and the Microsoft SQL 2008 software installed on separate Windows 2008 SP2 servers.

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About this chapter

This chapter provides instructions for customers installing HBI in a single-server or a multi-server environment. Accordingly, it is essential that you follow the correct instruction set in each section.

Be sure to read the introductory text and notes provided in each section before you step through the procedure.

The following topics are discussed in this chapter.

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Install procedures by environment type

This section provides a high level task list of the procedures necessary to install Horizon Business Insight 15.0.

Task lists are provided for the single-server and multi-server environments noted below:

Topic	See Page
Install in a single-server environment	5-4
Install in a multi-server environment	5-5

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Install in a single-server environment

This section provides a high-level overview of the procedures necessary to install Horizon Business Insight 15.0 in a single-server environment. It applies to customers who meet the following requirements:

- You are installing Horizon Business Insight for the first time on a Windows 2008 server.
- Horizon Business Insight will be running in a single-server environment

The task list below is an overview of the installation process. Be sure to follow the instructions provided in the various sections of this chapter.

1	Set up and configure Active directory domain accounts
2	Enable DTC communications
3	Add SQL Login for *HBIAdmin* account, if necessary
4	Check environment parameters on the server
5	Install the HBI software
6	Install HBI websites
7	Perform manual configuration procedures for: • HBI Viewer • SMTP operator privilege • Add login to Microsoft SQL server • User rights for WTUsers • JBoss configuration • Security and share permissions for folders, subfolders, files
8	Establish HBI server configuration settings
9	Reboot the HBI server
10	Verify HBI installation process has completed successfully
11	Update your HBI information with PA Customer Support Center
12	Assess need for additional optional configuration of your HBI system

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Install in a multi-server environment

This section provides a high-level overview of the procedures necessary to install Horizon Business Insight 15.0 in a multi-server environment. It applies to customers who meet the following requirements:

- You are installing Horizon Business Insight for the first time on a Windows 2008 server.

- Horizon Business Insight will be running in a multi-server environment

The task list below is an overview of the installation process. Be sure to follow the instructions provided in the various sections of this chapter.

Procedures necessary on the HBI application server	
1	Set up and configure your Active directory domain accounts
2	Enable DTC communications
3	Add SQL Login for *HBIAdmin* account, if necessary
4	Check environment parameters on the server
5	Install the HBI software
6	Install HBI websites
7	Perform manual configuration procedures for: • HBI Viewer • SMTP operator privilege • User rights for WTUsers • JBoss configuration • Security and share permissions for folders, subfolders, files
8	Establish HBI server configuration settings
9	Reboot the application server
	The remaining steps in this table cannot be performed until all procedures set for in the table below have been completed on your SQL database server.
10	Verify that the HBI installation process has completed successfully
11	Update your HBI information with PA Customer Support Center
12	Assess need for additional optional configuration of your HBI system

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Procedures necessary on the HBI SQL server	
1	Enable DTC communications on SQL server
1	Check environment parameters on the server
2	Install databases and HBI components
3	Perform manual configuration procedures for: • Add login to Microsoft SQL server • Security and share permissions for folders, subfolders, files
4	Establish HBI server configuration settings
5	Reboot the SQL server

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Set Up HBI-specific accounts

At this point in the install, your HBI system must be a member of an Active Directory Domain.

This section contains step-by-step setup instructions for installing Horizon Business Insight 15.0 user accounts on Windows 2008 Server (or Windows 2003 Server) Active Directory Domain controllers.

Customers in a single server or multi-server environment must proceed by setting up the users on this domain.

Important notes:

- These steps assume that you are logged onto the server with either the Windows Local Administrator account or with the new *HBIAdmin* account.

- The installation of the HBI software needs to be performed directly on the server. Do not use an emulation software package such as Terminal Services or PCAnywhere.

- Be sure you perform the following steps on the Domain Controller server.

- Multi-server customers must create the HBI-specific accounts on both servers.

- It is recommended that you do not exit until you have completed this section.

Follow the steps below to set up your active directory domain accounts. The steps in this section also pertain to customers running Horizon Business Insight on a local server.

Step	Task
1	Go to **Start/Programs/Administrative Tools/Active Directory Users and Computers**.
2	Expand the domain and create the following two domain accounts in your domain. These accounts should not currently exist in the domain. • MTS_WTADMIN • MTS_WTUSER

Note: The Active Directory Folder will be specific to the domain where the Horizon Business Insight server is being installed.

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MTS_WTADMIN account

Step	Task
1	From the Windows 2008 menu select **Start/Programs/Administrative Tools/Active Directory Users and Computers**.
2	Expand the domain and select **Users**. • Right-click and select **New/User**.
3	On the New User window, set the following and then click **Next**: <table><tr><td>First name</td><td>MTS_WTADMIN</td></tr><tr><td>Last name</td><td>HBI Administrator</td></tr><tr><td>Full name</td><td>HBI Administrator</td></tr></table>
4	Enter the password in the **Password** and **Confirm Password** fields; click **Finish**.
5	Right-click on the MTS_WTADMIN account; select **Properties**.
6	Click on the Account Tab and verify that the following options are selected: • User cannot change password. • Password never expires.
7	Click on the Member Of tab and verify that MTS_WTADMIN is a member of the following: <table><tr><td>Local Administrators Group</td><td>[your domain name.com]/Builtin</td></tr><tr><td>Domain Users</td><td>[your domain name.com]/Groups</td></tr></table> **Note**: Adding MTS_WTADMIN to Local Administrators group must be done on the HBI application server and the database server. **Note**: The Active Directory Folder will be specific to the domain where the Horizon Business Insight server is being installed. If you do not see the above assignments, click **Add** and follow the prompts to add the proper groups.
8	Click **Apply** and then **OK**.

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MTS_WTUSER

Step	Task
1	From the Windows 2008 menu select **Start/Programs/Administrative Tools/Active Directory Users and Computers**.
2	Expand the domain and select **Users**. • Right-click and select **New/User**.
3	On the New User window, set the following and then click **Next**: <table><tr><td>First name</td><td>MTS_WTUSER</td></tr><tr><td>Last name</td><td>HBI COM+Packages</td></tr><tr><td>Full name</td><td>HBI COM+Packages</td></tr></table>
4	Enter the password in the **Password** and **Confirm Password** fields; click **Finish**.
5	Right-click on the MTS_WTUSER account; select **Properties**.
6	Click on the Account Tab and verify that the following options are selected: • User cannot change password. • Password never expires.
7	Click on the Member Of tab and verify that MTS_WTUSER is a member of the following: <table><tr><td>Domain Users</td><td>[your domain name.com]/Groups</td></tr><tr><td>Users</td><td>[your domain name.com]/Builtin</td></tr></table> **Note**: Adding MTS_WTUSER to Local Users group must be done on the HBI application server and the database server. **Note**: The Active Directory Folder will be specific to the domain where the Horizon Business Insight server is being installed. If you do not see the above assignments, click **Add** and follow the prompts to add the proper groups.
8	Click **Apply** and then **OK**.
9	Close the Administrative Tools/Active Directory Users and Computers window.

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Enable DTC communications

The DTC (*Distributed Transaction Coordinator*) settings allow the HBI application to communicate directly with the database over the network. In some cases, the application of Service Pack 1 for Microsoft Windows 2008 server and/or certain of the Microsoft hot fixes may have disabled the required security settings necessary for proper communication.

Follow the procedures in this section to verify the required settings and to re-enable them if necessary.

IMPORTANT: Multi-server customers must follow the procedure in this section on <u>both</u> the HBI application server and on the database server.

Step	Task
1	Click **Windows Start**. • Select **Run**. • In the Run window, type: **dcomcnfg**
2	In the left pane: • Expand **Component Services\Computers\My Computer**. • Expand My Computer/**Distributed Transaction Coordinator**/ • Right-click on **Local DTC** and select **Properties**. • On the Properties window, select the Security tab.
3	On the Security Configuration window, verify the following options are <u>selected</u>. If the settings are not correctly enabled, change them. When the options are properly set, click **OK** to move on. <table><tr><td>Security Settings</td><td>• Network DTC Access • Enable XA Transactions</td></tr><tr><td>Client and Administration</td><td>• Allow Remote Clients • Allow Remote Administration</td></tr><tr><td>Transaction Manager Communications</td><td>• Allow Inbound • Allow Outbound • No Authentication Required</td></tr></table>
4	Click **Yes** to restart the service and then click **OK** at the prompt.
5	On the same window: • Select **My Computer.** • Right-click and select **Properties**.

Step	Task
6	On the Properties window, open the COM Security tab.
	• In the Access Permissions section, click **Edit Default** and verify that the permissions for each account are enabled as shown below.
	• If the settings are incorrect, change them. Click **Add** and follow the prompts, if necessary to add any missing groups/users.
	• When the permissions are properly set, click **OK** to move on.

Account Name	Account Location	Set Permissions to Allow
INTERACTIVE	Local	Local Access Remote Access
MTS_WTUSER	Domain or Local	same as above
SELF	Local	same as above
SYSTEM	Local	same as above

Step	Task
7	On the COM Security tab, in the Launch section, click **Edit Default** and verify that the permissions for each account are set as shown in the table below:
	• If your permission settings are incorrect, change them. Click **Add** and follow the prompts, if necessary to add any missing groups/users.
	• When the permissions are properly set, click **OK** to close the window.

Account Name	Account Location	Set Permissions to Allow
Administrators	Local	Local Launch Remote Launch Local Activation Remote Activation
INTERACTIVE	Local	same as above
IUSR	Local	same as above
MTS_WTUSER	Domain or Local	same as above
SYSTEM	Local	same as above

Step	Task
8	Log off the server.
	Important: If you make any changes to groups or users or the access or launch settings, you must reboot the server.

Move on to the next section.

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Add SQL login for *HBIAdmin* account, if necessary

Follow the steps in this section to assign SQL login privileges to the *HBIAdmin* account.

Important: If you are using the Local Administrator account instead of the *HBIAdmin* account to install the HBI software and components, you do not need to perform the procedure described below. See "Determine your Windows Software Install Account" on page 3-10.

Step	Task
1	On the SQL server, navigate to the following location depending on your SQL server version and connect to the server: For SQL Server 2008: **Windows Start/Programs/Microsoft SQL Server 2008/SQL Server Management Studio**.
2	Connect to SQL using your preferred connection method.
3	In the tree-view, expand **Security**, then right-click on **Logins.** Verify that the HBIAdmin login is present. (This login is added during installation of the SQL server software.)
4	Right-click on HBIAdmin and select **Properties**. Verify the properties are set as shown below. <table><tr><td>**Login Name**</td><td>HBIAdmin account</td></tr><tr><td>**Authentication**</td><td>Windows Authentication</td></tr><tr><td>**Defaults - Database**</td><td>Master</td></tr></table>
5	Select the Server Roles tab and place a checkmark next to **sysadmin.**
6	Click on the User Mapping tab and select the following: • Master • Model • Tempdb Select db_owner for each of the above and then click **OK**.

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Install the HBI application server

All customers installing HBI for the first time in either a single or a multi-server environment must follow the instructions provided in this section to set up the HBI application server.

Note: Instructions in this section differ slightly depending on whether you are running HBI in a single or a multi-server environment. Be sure to read through all of the steps before you begin the procedures and then follow the instructions carefully.

About the HBI installation software for Windows 2008 servers

Note the following before you begin the procedures in this section:

- The instructions in this section apply to the HBI 15.0 installation software for Windows 2008 Servers. This executable zip file is available for download from the McKesson Download Central web site.

  Once you have downloaded and saved the software self-extracting zip file to your HBI (application) server, double-click on it to unzip the installation folders and files. By default, the unzip location is: **C:\TempHBI\HBI15.0**

  Note: If the files are extracted to a different location, be sure that information is available to you. The instructions in this section required you to browse to that location and select the necessary executable files.

  When the files and folders have been unzipped, you will note the following subfolders below C:\TempHBI\HBI15.0 (*the default location*).

  - **..\HBI 15.0 Installation Files** - This folder includes all of the files you need to install the Horizon Business Insight 15.0 software on your Windows 2008 server(s).

  - **..\Reusable HBI Files** - This folder includes a set of files that you can rerun on your server in the future should the need arise. You may not need the files in this directory. If you think it is necessary to rerun one or more files, log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance.

  - **...\Server Migration Files** - This folder includes the files and scripts for use only by customers who are migrating data to a new server. In a multi-server environment, this folder is extracted and saved on the SQL database server later in the installation procedures.

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Verify environment parameters

The steps in this section verify that your operating system and various related components are at the proper release level.

Before you begin, check to see if there is an antivirus program running, if so stop it. If you are unsure how to stop the antivirus program, refer to your antivirus software documentation.

Important: You must be logged into the server with either the Local Administrator account or the *HBIAdmin* Account. See "Determine your Windows Software Install Account" on page 3-10.

Run wtInstallCheck executable

Step	Task
1	Browse to the location where the HBI 15.0 software installation files were extracted from the zip after they were downloaded from the McKesson Download Central web site. The default location is **C:\TempHBI\HBI 15.0\HBI 15.0 Installation Files**. • Open folder: ***...\2008*** • Run the file called: **wtInstallCheck.exe**
2	On the Horizon Business Insight Version Check and Install Paths window, select **HBI application server** as your server type, then click **Continue.** **Note to Multi-server customers**: Select **HBI application server** to run this executable file on the HBI server. Instructions for running this executable on the Database Server are provided later in this manual.

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Step	Task
3	On the Horizon Business Insight Installation Version Checker window, you must provide the information described below.
	First, review the section, "IMPORTANT! Installation location for HBI software components" on page 1-2 and carefully review the notes below.
	• You cannot create a new folder structure from this window; you can only browse to a location that has already been created on the server.
	• You cannot overwrite the default paths shown. You may accept the defaults or click **Browse** to navigate to the location on the server where your organization has decided to install the HBI web sites, Com+ applications and the HBI data files.
	• If you select a single drive letter as your install location, "\HBI" is added to the path location. This is required. You cannot install to the root directory.
	• You cannot modify the paths once you have installed the software. If changes are necessary, do not continue with the installation of the HBI software. Instead, log an ICSS service order requesting assistance from the Performance Analytics Customer Support Center. Once the change has been completed, you can return to the procedure described in this section.
	When you are certain of the drive letter(s) where you want the HBI components to reside, provide the information described below:

	Database Server Name	Enter the name of the HBI server where Microsoft SQL is installed.
	Web Sites Path	This reflects the location where you intend to install the HBI websites. Default is: c:\Inetpub\wwwroot\
	Com Plus Applications Path	This reflects the location where you intend to install the COM+ applications. Default is: c:\Program Files(x86)\ComPlus Applications\HBI\
	HBI Data Files Path	This reflects the location where you intend to store subset source files; report source files and install and application log files. WTFiles, WTReports, WTTemp, WTLog directories are created in this location. Default is c:\HBI\
	JBoss Path	Default is: c:\Program Files\McKesson\HBI Software\JBoss
		This reflects the location where you intend to load the JBoss utility files for the dashboard. Regardless of the drive letter (partition) you have chosen, the path must <u>always</u> be: ..\Program Files\McKesson\HBI Software\JBoss

Step	Task
4	When your entries are complete, click **OK** to save and close the window.
5	When you are notified that the version check has succeeded and the install paths have been successfully entered in the registry, click **OK**.

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Step	Task
6	When the HBI Installation Check window is displayed, choose one of the following: • **View log** to view the log file now. If you choose to view the log file now, you must close the window when you have completed your review. To do so, click **File/Exit**, then click **Exit** to close the window. • **Exit** to close the window. If you choose to exit at this time, be sure to review and save the log file located at: *x:\HBI\Wtlog\Install\HBI_Install_Check_[date]_[HH]_[MM].log* **Note:** If you find errors in the log file or if this process fails, use the log file to determine the issue. You must resolve the issue before continuing.

Important: Do not continue with the installation unless you have completed this procedure without failures or errors.

Once you have done so, move on to the next section.

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Verify Registry and Windows Directory setup on the HBI server

Once you have successfully run the wtInstallCheck.exe, follow the steps below to complete the verification of the environment parameters on the HBI server.

Note: If the registry settings or Windows directories are not set up as expected, log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance in resetting your environment parameters.

Do not continue with the installation procedures until you have done so.

Verify registry setup

Step	Task
1	Select **Windows/Start/Run** and type the following: REGEDIT
2	Expand the registry key noted below: **HKey_Local_Machine\Software\WOW6432Node\McKesson HBOC\WebTREND**
3	Verify that the paths for the following are correctly defined based on how you wish to partition your HBI server. Each of the registry keys shown below should reflect the drive letter and path shown on the HBI Installation Version Checker window: • **ComPath** key reflects value in *Com Plus Applications Path* • **DataPath** key reflects value in *HBI Data Files Path* • **JBossPath** key reflects value in *JBoss Path* • **WebsitesPath** key reflects value in *Web Sites Path* • **DBServerName** key reflects value in *Database Server Name* • **LogPath** and **DataPath** keys reflect value in *HBI Data Files Path*

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Verify Windows directory setup

Step	Task
1	In Windows Explorer, navigate to: C:\HBI.
2	Verify that the following directories have been created: • \Temp • \WTLog • \WtFiles • \WtReports
3	Navigate to the location noted below and open the file indicated: ...\WTLog\Install*HBI_Install_Check_[date]_[HH]_[MM].log* Verify that the drive letter and paths for the COM+, HBI Data Files, JBoss and Websites Paths are set as you intended.

STOP: If any of the paths are not correct in the log file, <u>do not continue</u> with the HBI software installation procedures. Log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance is resetting your paths as necessary.

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Install Horizon Business Insight software on HBI server

After you have successfully run the wtInstallCheck file without any errors, you are ready to install the Horizon Business Insight software on the server.

Step	Task
1	Browse to the location where the HBI 15.0 Installation software was extracted after it was downloaded from the McKesson Download Central web site. The default location is **c:\TempHBI\HBI15.0\HBI 15.0 Installation Files\2008**. Based on your environment, double-click on the applicable executable indicated below to run it. For single-server: ***HBI_Single.exe*** For multi-server: ***HBI_Multi_HBI.exe*** Please be patient. This file may take several minutes to run.
2	At the Install HBI 15.0 Introduction window, click **Next** to continue.
3	When the Pre-Installation Summary is displayed: • Verify the accuracy of the installation information. • Click **Install** to continue. **Note**: As the installation process proceeds, progress is displayed on your screen. Please be patient; this may take some time. <u>Do not</u> perform other activities on the server while the process is running.
4	When prompted to load the HBI software, click **Yes**. When prompted to select the directory from which to load the packages, <u>you must select the default path shown below</u>: ***C:\McKesson\HBI 15.0\Server\Packages*** **Important**: This path is automatically created when you run the executable file noted in the steps above. If you change this path, the installation cannot be successfully completed.
5	Click **OK** to continue.

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Step	Task
6	Provide a Domain, Username and Password:
	• Enter the domain name for both the MTS_WTUSER and MTS_WTADMIN. *(If this is a local server, domain name is not applicable.)*
	• Enter each Username in the appropriate section.
	• Enter the password for each account. If it has changed recently, see your System Administrator.
	The Com+ Package installation will proceed. When the installation has completed, you will see an HBI Installation Complete dialog box.
	• Click **OK**.
7	You will be prompted to **View Log** or **Exit**.
	• McKesson recommends that you choose **View Log** at this time.
	• When you have completed your review, click **Exit** to close the window and allow the installation process to continue.
	The HBI software installation will continue to run.
8	Click **Done** when you are notified that the installation is complete.

Move on to the following section to update the HBI passwords on your server.

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Update HBI password and settings

When you run the HBI software executable file described in the procedure above, it creates the following local users on your HBI server:

- wtadmin
- wtdemo
- hbi_soapuser

The default password for these local accounts is *McKesson123*; the password is set to *Never Expire*.

McKesson recommends that you reset the password based on your organizational security settings. In a multi-server environment, perform this procedure on the HBI application server only.

Step	Task
1	Navigate to **Windows Start/Programs/Administrative Tools/Computer Management/Local Users and Groups/Users**.
2	• Right-click on the <u>wtadmin</u> account and select **Set Password** • Change the password, as desired.
3	• Right-click on the wtadmin account and select **Properties** from the shortcut menu. • On the General tab, change the password settings, as desired.
4	Repeat for each of the remaining local accounts noted above.

In addition to the user accounts described above, the HBI software also creates:

- Local group named, WTUSERS: All HBI users, both local and domain, are added to this group. <u>Do not</u> make changes to the WTUSERS group.
- Two SQL login accounts with passwords:
    - hbiportal - *HBIportalpazz4*
    - hbijboss - *HBIjbosspazz4*

    These login accounts are created in your SQL Server software; they are not local computer accounts. (In a multi-server environment, these accounts are created later in these instructions when the HBI software executable file is run on the SQL database server.) McKesson recommends that you <u>do not</u> change the passwords for these login accounts without assistance from the Performance Analytics Customer Support Center.

Important: Move on to your next installation task as follows:

- <u>Single-server customers</u>: Skip the section beginning on the following page and move on to the section to entitled Verify setup process on page 5-27.

- <u>Multi-server customers</u>: Move on the section beginning on the next page entitled Install database server - SQL server (multi-server only).

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Install database server - SQL server (multi-server only)

The instructions in this section are designed for customers installing Horizon Business Insight for the first time in a multi-server environment. The procedures below install the required databases and Horizon Business Insight components.

Single-server customers can skip this section.

IMPORTANT: Before you begin

All customers in a multi-server environment will be directed in the instructions in this section to run certain SQL installation executable files on the <u>SQL database server</u>.

Important: You must be logged into the server with either the Local Administrator account or the *HBIAdmin* Account. See "Determine your Windows Software Install Account" on page 3-10.

Prior to beginning these procedures, follow the steps below:

Step	Task
1	Navigate to the location on the <u>HBI application server</u> copy where you unzipped the folders and files included in the <u>HBI installation software for Windows 2008</u> after you downloaded it from McKesson's Download Central web site. The default location is: **C:\TempHBI\HBI15.0**.
2	Open the folder: **..\HBI 15.0 Installation Files\2008**.
3	In the **2008** folder, copy the entire **Multi_Database** folder to your SQL database server.
4	On your SQL database server, open the **Multi_Database** folder and double-click on the **HBI_Multi_SQL.exe** file to extract the files. The default location for the extracted files on you SQL server is: **C:\TempHBI\HBI 15.0 SQL**. This location now contains all of the executable files necessary to update your SQL server.

Verify environment parameters on the SQL server

Follow the steps below to verify that the operating system and related components on the SQL database server are at the proper version for Horizon Business Insight 15.0.

IMPORTANT: If you encounter an error during this process indicating that you do not have the required version of Windows currently running on your server, do not proceed with the installation process until you have upgraded to the required version of Windows.

Step	Task
1	On the SQL server, browse to the location where you extracted the HBI multi-server software files. The default location is: **c:\TempHBI\HBI 15.0 SQL**. • Run the file called: **wtInstallCheck.exe**
2	On the Horizon Business Insight Version Check and Install Paths window, click the button noted below, then click Continue to move on. **Database server (applicable only to multi-server environments)**
3	On the Horizon Business Insight Installation Version Checker window, you must provide the information described below. However, before you do so, review the section entitled, "IMPORTANT! Installation location for HBI software components" on page 1-2 and then carefully review the notes below. • You cannot create a new folder structure from this window; you can only browse to a location that has already been created on the server. • Where applicable, the default paths shown on the window include paths on different partitions. You cannot overwrite the default paths shown. You may accept the defaults or click **Browse** to navigate to the location on the server where your organization has decided to install the Com+ applications and the HBI data files. • If you select a single drive letter as your install location, "\HBI" will be added automatically to the path location. This is required. You cannot install to the root directory. • You cannot modify the paths once you have installed the software. If changes are necessary, do not continue with the installation of the HBI software. Instead, make the necessary changes to your drive partitions on your server and then return to the procedure described in this section. When you are certain of the drive letter(s) where you want the HBI components to reside on the server, provide the information requested as described below:

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Step	Task	
	Database Server Name	Enter the name of the HBI server where Microsoft SQL is installed.
	Web Sites Path	The Web Sites Path is not applicable on the SQL database server.
	Com Plus Applications Path	This reflects the location where you intend to install the COM+ applications. Default is: c:\Program Files(x86)\Com Plus Applications\HBI\
	HBI Data Files Path	This reflects the location where you intend to store subset source files; report source files and install and application log files. WTFiles, WTReports, WTTemp, WTLog directories are created in this location. Default is c:\HBI\
	JBoss Path	The JBoss Path is not applicable on the SQL database server.
4	When your entries are complete, click **OK** to save and close the window.	
5	When the HBI Installation Check window is displayed, click **OK**. Be sure to review and save the log file located at: *x:\HBI\Wtlog\Install\HBI_Install_Check_[date]_[HH]_[MM].log*	
6	When you are notified that the version check has succeeded and the install paths have been successfully entered in the registry, **click** OK.	
7	When the HBI Installation Check window is displayed, choose one of the following: • **View log** to view the log file not. if you choose to view the log file now, you must close the window when you have completed your review. To do so, click **File/Exit**, then click **Exit** to close the window. • **Exit** to close the window. If you choose to exit at this time, be sure to review and save the log file located at: *x:\HBI\Wtlog\Install\HBI_Install_Check_[date]_[HH]_[MM].log* **Note**: If you find errors in the log file or if this process fails, use the log file to determine the issue. You must resolve the issue before continuing with these installation procedures.	

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Install databases and HBI components on the SQL server

Follow the steps below to install the databases necessary for Horizon Business Insight 15.0 on the SQL server.

Step	Task
1	On the SQL server, browse to the location where you extracted the HBI multi-server software files. The default location is: **c:\TempHBI\HBI 15.0 SQL**. • Run the executable: **HBI_SQL.exe**.
2	At the Install HBI 15.0 Introduction window, click **Next** to continue.
3	When the Pre-Installation Summary is displayed: • Verify the accuracy of the installation information. • Click **Install** to continue. **Note**: As the installation process proceeds, progress is displayed on your screen. Please be patient; this may take some time. <u>Do not</u> perform other activities on the server while the process is running.
4	When prompted to load the HBI software, click **Yes**. When prompted to select the directory from which to load the packages, <u>you must select the default path shown below</u>: ***C:\McKesson\HBI 15.0\Server\Packages*** **Important**: This path is automatically created when you run the executable file noted in the steps above. If you change this path, the installation cannot be successfully completed.
5	Click **OK** to continue.
6	Provide a Domain, Username and Password: • Enter the domain name for both the MTS_WTUSER and MTS_WTADMIN. *(If this is a local server, domain name is not applicable.)* • Enter each Username in the appropriate section. • Enter the password for each account. If it has changed recently, see your System Administrator. The Com+ Package installation will proceed. When the installation has completed, you will see an HBI Installation Complete dialog box. • Click **OK**.

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Step	Task
7	You will be prompted to **View Log** or **Exit**. • Mckesson recommends that you choose **View Log** at this time. • When you have completed your review, click **Exit** to close the window and allow the installation process to continue. The HBI software installation will continue to run.
8	Click **Done** when you are notified that the installation is complete.

Important: Once you have completed the steps above, move on to the following section entitled, Verify setup process.

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Verify setup process

The setup process for the HBI server(s) creates several log files. You must review these log files before proceeding to the next set of instructions.

The location and names of the log files associated with key procedures in the install process are provided below.

- x:\HBI\WtLog\Install\CreateHBIUsers.log
- x:\HBI\WtLog\Install\HBI_15_0_Install_[date/time].log
- x:\HBI\WtLog\Install\HBI_DBInstall_15_0.log   *
- x:\HBI\WtLog\Install\HBI_DBInstall_WebPortal_15_0.log *

   * <u>In a multiserver environment</u>, the database log files noted with an asterisk above are found on the database server.

If errors are noted in any of the log files noted above, do not continue with the installation. Log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance.

After you have resolved any errors, all customers can move on to the instructions for installing the IIS websites as described in the following section.

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Install IIS websites - HBI server

All customers installing HBI for the first time must perform the steps below on the HBI server to install and configure the IIS WebSites for Horizon Business Insight 15.0.

Note to Multi-server customers: The steps below must be performed on the HBI application server.

During the steps in this section, you may encounter a command window with the following message:

```
The system was unable to find the specified registry key or
value.
```

This message does not reflect a problem with the files or procedures described in this section. You can safely ignore this message.

Follow the steps below to install the IIS websites on the HBI server.

Step	Task
1	Browse to the location where the HBI 15.0 Installation Executable files were extracted. The default location is **c:\McKesson\HBI 15.0**. • Open the **...\Server\Web** folder • Run the file called: **WebInstall_15_0.bat**
2	Navigate to the location noted below: x:\HBI\WTlog\Install\ Open the log file noted below and verify that the websites are correctly installed: WebInstall_[hbiversion#]_[Date/Time].log If the log file noted above does not exist or there are errors in the file, do not continue with the installation procedures. Log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance.

Important: Once you have completed the steps above, move on to the following section entitled, Configure your HBI system.

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Configure your HBI system

Once the procedures in the previous sections of this chapter have been completed, all customers installing HBI for the first time in either a single or a multi-server environment must follow the instructions in this section to complete the configuration requirements for your Horizon Business Insight system.

The configuration instructions in the following pages describe HBI server settings that are required for your Horizon Business Insight software to run properly. You cannot skip these instructions.

Note to multi-server customers: Some of the configuration procedures in the following pages require additional steps to be performed by customers in a multi-server environment. These sections are labeled accordingly.

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Configure HBI_Viewer - HBI server

All installing customers must follow the steps in this section to manually adjust the Custom Errors setting in the HBI_Viewer WebSite on the HBI application server.

Step	Task
1	Go to **Start/Settings/Control Panel/Administrative Tools/Internet Information Services (IIS) Manager.** • From the Internet Information Services (IIS) window, expand: **local machine/ Sites/Default web site/** (*where local machine is the machine name of the HBI server*). • Select **HBI_Viewer** (located under Default Website).
2	In the center pane (default), scroll down to the IIS Setting area. • Locate **Error Pages** and double-click on it. • Choose **404** and double-click on it.
3	On the Edit Custom Error Page window, select the action to **Execute a URL on this site.**
4	In the URL text box: • Type the following: /hbi_viewer/wterror_404.asp • Click **OK** to close the window.
5	Close Internet Information Services (IIS) Manager.

Move on to the next section.

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Grant SMTP operator privilege - HBI server

In order for e-mail notification to work, Operator privilege on the default SMTP Virtual Server must be granted to the MTS_WTUSER account and the SMTP service must be set to startup automatically. There are three procedures in this section. Follow the steps in each procedure below to fully configure SMTP.

Step	Procedure 1 Tasks: Configure SMTP
1	Navigate to **Start/Programs/Settings/Control Panel/Administrative Tools/Internet Information Services (IIS) 6.0 Manager**. • Expand **Local Machine** and then select **SMTP Virtual Server #1**. • Right-click and select **Properties**.
2	Select the Security tab, then: Click **Add**. Click **Locations** to select your domain.
3	On the Select Users or Groups window: • Click **Advanced**. • Click **Find Now** to populate the Search results list. • Select **MTS_WTUSER** from the list in the Search results area. • Click **OK**. • Click **OK** again. • Click **Apply**. • Click **OK**.
4	Close Internet Information Services (IIS) 6.0 Manager.

Step	Procedure 2 Tasks: Set SMTP service to Automatic
1	Navigate to **Start/Settings/Control Panel/Administrative Tools/ Services**.
2	In the Services pane, right-click on the Simple Mail Transfer Protocol (SMTP) service and select **Properties** from the shortcut menu.
3	On the General tab, verify that the Startup type is set to: <u>Automatic</u>. If necessary, change the type and click **OK** to save the change.
4	Close the Services window.

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Step	Procedure 3 Tasks: Set security permissions on mailroot folder
1	On your HBI server, browse to the location of the mailroot directory, noted below: **c:\inetpub**
2	Right-click on the *mailroot* folder and select **Properties** from the shortcut menu. • Select the Security tab • Click **Edit** and then click **Add**.
3	On the Select User, Computer or Group window, click **Locations** and select domain. Click **OK**. Click **Advanced** Click **Find Now** to populate the Search results area. From the Search results list shown on the window, select <u>MTS_Wtuser</u> account. Click **OK** to return to the Select User, Computer or Group window. Click **OK** again to return to the Properties window. In the **Allow** column, place a checkmark in Modify permission box for the selected account to activate the required permission setting.
4	Click **OK**.
5	Click **OK** again to save the settings for MTS_Wtuser account in the mailroot directory.

Move on to the next section.

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Add login to Microsoft SQL Server 2008

Follow the steps in this section to allow for package access to the Horizon Business Insight databases. MTS_WTUSER must be added as a SQL Server login.

Note to multi-server users: You must perform the steps in this section on the HBI database server.

Step	Task
1	Navigate to **Start/Programs/ Microsoft SQL Server 2008/SQL Server Management Studio** and connect to the server. • In the tree-view, expand **Security**. • Right-click on **Logins** and select **New Login**.
2	On the General tab of the Login- New window, enter or select the information shown below. To begin, click **Search** and select the Login Name shown below. <table><tr><td>**Login Name**</td><td>(domain or local) MTS_WTUSER account</td></tr><tr><td>**Authentication**</td><td>Windows Authentication</td></tr><tr><td>**Defaults - Database**</td><td>WebTrend</td></tr></table>
3	Select the Server Roles tab and place a checkmark next to **sysadmin.**
4	Select the User Mapping tab.
5	Select the checkbox next to the Webcache database and place a checkmark next to the following under **Database role membership for Webcache**: • public • db_owner
6	Select the checkbox next to the Webdata database and place a checkmark next to the following under **Database role membership for Webdata**: • public • db_owner

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Step	Task
7	Select the checkbox next to the Webtrend database and place a checkmark next to the following under **Database role membership for Webtrend**: • public • db_owner • Click **OK** to continue.
8	Right-click on **Login Name** of *HBIAdmin*. • Select the Server Roles tab and verify the following are selected: - sysadmin - public • Select the User Mappings tab and verify that all databaes (not including the msdb database) have the following selected: - db-owner Click **OK**.
9	Click **OK** and close the Microsoft SQL Server Management Studio.

Move on to the next section.

Establish user rights - HBI server

This section describes the procedures to set up the required user rights for the WTUsers group and the MTS_WTUSER and MTS_WTADMIN domain accounts.

Be sure to set up the applicable user rights for the accounts noted in the procedures in this section.

Log on as a batch job

Step	Establish rights for WTUsers group
1	From the Windows menu, select **Start/Settings/Control Panel/ Administrative Tools/Local Security Policy.**
2	Select **Local Policies/User Rights Assignments/ Log on as a batch job**. • Right-click and select **Properties.** • On the properties window, click **Add User or Group**.
3	On the Select Users or Groups window: • Cick **Locations**. • Select your local server. (The default displayed when the window opens is your domain. You must change this entry.) • Click **OK**.
4	Click **Object Types** and select **Groups** from the list on the Object Types window. • Click **OK** to return to the previous window.
5	On the Select Users or Groups window: • Click **Advanced**. • Click **Find Now** to populate the Search results box. • Select **WTUsers** from the list. • Click **OK**. • Verify that the local WTUsers group appears in the list and click **OK**. • Click **OK** again.

Allow log on locally

Repeat the steps above to check the policy to allow **Log on locally** for WTUsers.

Once you have done so, move on to the next section and continue.

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Access this computer from the network

Repeat the steps below to check the policy to **Access this computer from the network** for the MTS_WTUSER and MTS_WTADMIN domain accounts.

Step	Establish user rights for MTS_WTUSER and MTS_WTADMIN
1	From the Windows menu, select **Start/Programs/Administrative Tools/Local Security Policy**.
2	Select **Local Policies/User Rights Assignments/ Access this computer from the network**. • Right-click and select **Properties**. • On the properties window, click **Add User or Group**.
3	On the Select Users or Groups window: • Click **Locations** and select your domain server. • Click **OK.**
4	On the Select Users and Groups window: • Click **Advanced** • Click **Find Now** to populate the Search Results box. • Select **MTS_WTUSER**. • Click **OK**. • Click **OK**, again. • Click **Add**.
5	On the Select Users and Groups window: • Click **Advanced**. • Click **Find Now**. • Select **MTS_WTADMIN**. • Click **OK**. • Click **OK**, again. • Click **Yes**, then click **OK**.
6	Close the Local Security Settings window.

Move on to the next section.

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Deny logon locally and Deny logon through Terminal Services

Repeat the steps below to check the policy to **Deny log on locally** and **Deny logon through Terminal Services** for both the MTS_WTUSER and MTS_WTADMIN accounts. These accounts are restricted; they can be used <u>only</u> within the Horizon Business Insight applications.

Warning: Use of these accounts for other purposes may compromise the functioning of your Horizon Business Insight software.

Step	Establish user rights for MTS_WTUSER and MTS_WTADMIN
1	From the Windows menu, select **Start/Programs/Control Panel/ Administrative Tools/Local Security Policy**.
2	Select **Local Policies/User Rights Assignments/Deny logon locally.**
3	Right-click and select Properties On the Properties window, click **Add User or Group**.
4	On the Select Users and Groups window: • Click **Add User or Group**. • Click **Advanced** • Click **Find Now** to populate the Search Results box. • Select **MTS_WTUSER**. • Click **OK**, then click **OK**, again.
5	On the Properties window, click **Deny logon through Terminal Services**.
6	On the Select Users and Groups window: • Click **Add User or Group**. • Click **Advanced** • Click **Find Now** to populate the Search Results box. • Select **MTS_WTUSER**. • Click **OK** then click **OK**, again.
7	Repeat the steps above to deny logon locally and th deny logon through terminal services for the MTS_WTADMIN account.

Move on to the next section.

Configure JBoss software - HBI server

Follow the procedures in this section on the HBI application server to configure the new JBoss services to run properly with Horizon Business Insight.

Add JBoss services

This section provides you with automated and manual instructions for adding the JBoss services and related files noted below:

- McKesson HBI Servlets
- McKesson HBI Portal Server

Important: If you have installed the JBoss software to a drive other than C: you must follow the manual procedure below.

If you have installed the JBoss software to the C: drive, follow the automated procedure below.

Automated procedure to add JBoss Services

Important: If you have loaded the JBoss files to the C:\ drive, you must perform the automated procedure below on the HBI server.

However, if you have installed the JBoss software to a drive other than the C: drive, follow the manual procedure on the next page instead of the automated procedure below.

Step	Task
1	Browse to: **C:\McKesson\HBI 15.0**.
2	Open the **..\Server\Server Executables** folder and locate the file below: **service_MCKHBIPortlets.bat** • Double-click on the file to run it. • At the command window, Press **Enter** to continue. A log file named, *Services_mckhbiportlets.txt* is created in the Wtlog\Install directory.

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Step	Task
3	Repeat the step above to run the file noted below: **service_MCKHBIServlets.bat** A log file named, *Services_mckhbiservlets.txt* is created in the Wtlog\Install directory.
4	Navigate to the new log files at the location below and verify that each of the services have been properly installed. x:\HBI\wtLog\Install\ If the log file is empty, then the service has not been created. Log an ICSS service order for the Performance Analytics Customer Support Center requesting troubleshooting assistance.

Move on to the section entitled, Start JBoss services.

Manual procedure to add JBoss services

Important: If you have loaded the JBoss files onto a partitioned drive other than C:\, you must perform the manual procedure in this section on the HBI server.

Step	Task
1	Open a command window and change the directory to the following: X:\Program Files\McKesson\HBI Software\jboss\bin (*where X is the drive letter of the disk where you loaded the JBoss files*).
2	Edit the path by appending [*serviceHBI install*] as shown in bold below and then press **Enter**: X:\Program Files\McKesson\HBI Software\jboss\bin**>serviceHBI install** **Important**: If the message indicating *Service McKesson HBI Servlets installed* is displayed, continue on to the next step. Otherwise, stop here and log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance.

Step	Task
3	Edit the path by appending [*servicePortal install*] as shown in bold below and then press **Enter**: X:\Program Files\McKesson\HBI Software\jboss\bin**>servicePortal install** **Important**: If the message indicating *Service McKesson HBI Portal installed* is displayed, continue on to the next step. Otherwise, stop here and log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance.

No log file is created for this procedure.

Move on to the section entitled, .

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Start JBoss services

Once you have created the new JBoss services using either the manual or automated procedure in the previous sections, follow the steps below to initiate the services.

Step	Task
1	Navigate to Windows **START/Programs/Administrative Tools/ Services**.
2	Open the Services window on the HBI server and verify that the following services are present: • McKesson HBI Portal Server • McKesson HBI Servlets
3	On the Services window: • Select the following service: McKesson HBI Portal Server • Click on the highlighted **START** located in the left pane of the window.
4	Repeat the step above to start the following service: McKesson HBI Servlets

STOP: If you receive errors when starting the JBoss services, do not continue with the installation procedures. Log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance.

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Set Security and Share Permissions for Folders, Subfolders and Files

This section describes the required security and share permissions that must be configured on your HBI server (and the SQL server for multi-server environments). The tables below set forth all of the required accounts and permission settings. General instructions can be found after the tables.

Tables of required security and share permissions for HBI servers

Account name	Account location	Advanced Permission	Permission	Apply to
Security permissions for UserImages for wtportlets website (x:\inetpub\wwwroot\wtportlets) - HBI Application Server				
Administrators	local		Full Control	
CREATOR OWNER	local		Full Control	
IUSR	local		Modify	
MTS_WTUSER	domain or local		Modify	
SYSTEM	local		Full Control	
WTUsers *	local	Create Files/Write Data		This folder and subfolders
WTUsers *	local	Special	List Folders/Read Data Read Extended Attributes Delete Read Permissions Read Attributes	This folder, subfolders and files

* You must add two instances of the WTUsers account before setting the advanced permissions shown in the table.

Account name	Account location	Advanced Permission	Permission	Apply to
Security Permissions for isapi_redirect directory (c:\Program File\McKesson\HBI Software\isapi_redirect) - HBI Application Server				
Administrators	local		Full Control	
CREATOR OWNER	local		Full Control	
IIS_IUSRS	local		Modify	
MTS_WTUSER	domain or local		Modify	
SYSTEM	local		Full Control	
Users	local		Read and Execute	

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Account name	Account location	Advanced Permission	Permission	Apply to
Security Permissions for ExcelExport - HBI Application Server (x:\inetpub\wwwroot\webtrend)				
Administrators	local		Full Control	
CREATOR OWNER	local		Full Control	
IUSR	local		Modify	
MTS_WTUSER	domain or local		Modify	
SYSTEM	local		Full Control	
WTUsers *	local	Create Files/Write data		This folder and subfolders
WTUsers *	local	Special	List Folders/Read Data Read Extended Attributes Delete Read Permissions Read Attributes	This folder, subfolders and files
* You must add two instances of the WTUsers account before setting the advanced permissions shown in the table.				

Account name	Account location	Advanced Permission	Permission	Apply to
Security Permissions for Resource - HBI Application Server (x:\inetpub\wwwroot\webtrend)				
Administrators	local		Full Control	
IIS_IUSRS	local		Full Control	
IUSR	local		Read	
MTS_WTUSER	domain		Modify	
SYSTEM	local		Full Control	
WTUsers	local		Read	

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Account name	Account location	Advanced Permission	Permission	Apply to
Security Permissions on the HBI folder - HBI Application Server (x:\HBI)				
Administrators	local		Full Control	
IIS_IUSRS	local		Modify	
MTS_WTUSER	domain or local		Modify	
SYSTEM	local		Full Control	
WTUsers	local		Read	
IUSR	local		Modify	

Account name	Account location	Advanced Permission	Permission	Apply to
Security Permissions on the HBI folder - Multi-server only on the SQL Server (x:\HBI)				
Administrators	local		Full Control	
IIS_IUSRS	local		Modify	
MTS_WTUSER	domain or local		Modify	
SYSTEM	local		Full Control	
IUSR	local		Modify	

Account name	Account location	Advanced Permission	Permission	Apply to
Share Permissions on the HBI subfolders - HBI Application Server (x:\HBI\WTFiles and x:\HBI\WTReports)				
Administrators	local		Full Control	
MTS_WTUSER	domain or local		Change Read	
WTUsers	local		Read	

Account name	Account location	Advanced Permission	Permission	Apply to
Share Permissions on the HBI subfolder - Multi-server only on the SQL Server (x:\HBI\Temp)				
Administrators	local		Full Control	
MTS_WTUSER	domain or local		Change and Read	

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Setting security and share permissions

This section provides you with general procedures for setting the security and the share permissions as noted in the tables in the previous section.

Security permissions

Use the instructions below to set the security permissions on the HBI directories shown in the tables above. The required settings for the various accounts associated with each directory can also be found in the tables.

Step	Task
1	Browse to the location of the HBI directory as indicated in the heading row of the table.
2	Right-click on the [*HBIdirectory*] folder and choose **Properties** from the shortcut menu. • Select the Security tab and click **Advanced**. • Click **Edit**. • Remove the checkmark in the box to **Include inheritable permissions from this object's parent**. • Click **Remove**. • Click **OK** to return to the Properties window. • Click **Yes** on the security message, then **OK**, **Edit** and **Add**.
3	On the Properties window, click **Add** to begin adding the user accounts listed in the table. • On the Select User, Computer, or Group window, click **Locations** and select local server or domain based on the information shown in the table. • Click **OK**. • Click **Advanced**. • Click **Find Now** to populate the Search results area. • From the Search results list shown on the window, select an account associated with the current HBI directory. • Click **OK** to return to the Select User, Computer, or Group window. • Click **OK** again to return to the Properties window. • In the **Allow** column, place a checkmark in the appropriate permission box for the selected account to activate the required permission setting.

Step	Task
4	For each of the remaining accounts in the selected HBI directory, repeat step 3 above.
5	**Important**: *Perform this step only when setting permissions for the* *ExcelExport* *and* *UserImages* *folders. Otherwise, skip this step and move on to Step 6.* --- Set permissions for the <u>WTUsers</u> account from the Properties window, click **Advanced**. • Click **Edit**. • Click **Add**, then click **Advanced**. • Click **Find Now** to populate the Search results area, then select <u>WTUsers</u> from the results. • Click **OK**, then **OK** again. • Select **Create Files/Write data**. • Select **This folder and subfolders** and click **Apply these permissions to objects or contains with this container only**. • Click **OK**. • Click **Add**, then **Advanced** and repeat the bulleted items in this step to add a second instance of the <u>WTUsers</u> account. • Click **OK**, then **OK** again. • Select This folder, subfolders and files. • Select the following permissions: - List folders/Read data - Read Extended Attributes - Delete - Read Permissions - Read Attributes • Click **Apply these permissions to objects or containers with this container only.** • Click **Apply**, then **OK**.

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Step	Task
6	Click **Advanced**. • Place a checkmark in the box to select the option to **Replace all existing inheritable permissions on all descendants with inheritable permissions from this object.** • Click **OK**, then click **Yes** at the security message.
7	Click **OK** to save the settings for all accounts in the HBI directory.

Share permissions for folders and subfolders

Follow the steps below to share permissions on HBI folders and subfolders.

Step	Task
1	Browse to the location shown in the heading row of the applicable table at the beginning of this section.
2	Right-click on the folder/subfolder on which you want to set the share permissions.
3	From the Properties window, click the Sharing tab. • From the Sharing tab, select **Advanced Sharing**. • Select **Share This Folder**. • For the Share Name, enter the name of the subfolder as shown in the table. • Click **Permissions**, select <u>Everyone</u>, and then click **Remove**.
4	Click **Add** to begin adding the user accounts listed in the table shown above. • Click **Locations** and select the local server or domain depending on the information provided in the table for the user account that you have selected to add. • Click **OK**, then click **Advanced**. • Click **Find Now**. • From the Search results, select one of the user accounts shown in the table. • Click **OK** and then click **OK** again. • Select the proper permissions based on the information in the table for the user you selected. • Click **OK** and then click **OK** again.
5	Repeat step 4 for the remaining user accounts listed in the table.
6	Click **OK**.

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Establish HBI server configuration settings

The Horizon Business Insight Server Configuration window allows you to load your Horizon Business Insight product key, to establish administrative, user authentication, resource folder security, and SSL and DB settings. The window also provides settings specific to use of the Viewer and options for organizations with multiple entities as well as audit options for each of the HBI websites.

IMPORTANT: Only the required setting on the Horizon Business Insight Server Configuration window are set forth in this section. These instructions are required for all customers installing Horizon Business Insight for the first time in either a single and multi-server environment. In general, the procedures in this section must be performed on the HBI application server by both single and multi-server customers. Exceptions for multi-server customers are noted.

Refer to the document entitled, *Optional Configuration Guidelines for Horizon Business Insight*, for a description of additional optional settings available on this window.

Required settings for new installations

Following is a list of options where an entry or selection is required in order to run your Horizon Business Insight software. Follow the steps in this section to establish the required settings on the Horizon Business Insight Server Configuration window.

- HBI Product Key (Security tab)
- DB Server Name (Security tab)
- Report Settings for multi-server installations (Paths tab) (multi-server only)

NOTE: Be sure to click **Update** to save your changes before you close the window.

To access the window and update the configuration options, follow the steps below.

Step	Task
1	Browse to: C:\McKesson\HBI 15.0.
2	Open the **...\Server** folder and run the program: **wtServerConfig.exe**
3	When prompted with a message indicating that a Bad Product key has been encountered. Click **OK**.
	The multi-tabbed Horizon Business Insight Server Configuration window will be displayed. By default, the Security tab is displayed.
	Continue with the steps below to set the product key.

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Set Product Key

Follow the steps below to set the product key.

Step	Task
1	Click **Product Key** located in the lower right corner of the window.
2	Enter the Client Code and your Product Key, which were provided to you with the Horizon Business Insight software. The Product Key is case-sensitive. **Note**: The Client Code is your SAP code provided with the Horizon Business Insight software.
3	Click **Save** on the Product Key window and click **OK** at the prompt indicating that the product key has been updated.
4	Click **Exit** to close the Product Key window.
5	You will be returned to the Horizon Business Insight Server Configuration window. Do not close the window. Move on to the section below.

Verify DB Server Name

Step	Task
1	On the Security tab, In the DB Settings area, verify that the name of your HBI server shown in the DB Server Name field is correct. Your HBI system cannot be properly installed to version 15.0 without the appropriate information in this field.
2	Click **Update** to save your settings on the Security tab.
3	Do not close the Horizon Business Insight Server Configuration window. Move on to the section below.

Note to multi-server customers: You must also run the *wtServerconfig.exe* on the HBI database sever to verify that the DB Server Name field displays the correct information.

When you do so, you will encounter a message: "Bad product key." You can ignore this message on the SQL database server.

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Set Report Settings for multi-server installations only

Single-server customers can skip this section. Move on to the instructions on the next page.

Multi-server customers must enter a path in the Report Settings for multi-server installation area. Follow the steps below to do so.

Step	Task
1	On the Horizon Business Insight Server Configuration window, select the Paths tab.
2	In the box provided in the Report Settings for multi-server installation area, enter the path to the SQL database server in UNC format. You must enter the UNC path to the temp folder (shared) on the SQL database server as follows: \\[SQLSERVERNAME]\Temp
3	Click **Update** to save your settings.
4	If you do not intend to make any optional changes at this time, close the Horizon Business Insight Server Configuration window.

Move on to the next section in this document.

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Reboot the Horizon Business Insight system

All customers must reboot the HBI application server now.

Multi-server customers must reboot both the HBI application server and the SQL server.

Once you have completed the reboot, move on to the section below.

Verify United Kingdom Regional Options - UK Customers only

If you have installed Horizon Business Insight 15.0 on a UK server, follow the steps below to verify that your regional options are properly set.

Customers who have installed Horizon Business Insight 15.0 on a US server, can skip this procedure and move on to the next page to verify the installation of your Horizon Business Insight software and components.

Step	Task
1	From the Windows menu, select **Start/Settings/Control Panel.**
2	Select **Regional and Language Options**.
3	Select the Regional Options tab and verify that the following are selected: • Formats: English (United Kingdom) • Location: United Kingdom
4	Select the Administrative tab and click on **Copy to reserved accounts**. Verify that the following are selected: • **Default user account (new users)** • **System accounts (local system, local service, and network service)**
5	• Click **OK**. • Click **Apply**.
6	Move on to the next page to verify the installation of your Horizon Business Insight software and components.

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Verify installation of HBI software and components

Follow the steps below to verify that your Horizon Business Insight 15.0 software and components have been properly installed.

Important: If you cannot properly complete any of the steps below or if you encounter errors during this verification process, log an ICSS service order for the Performance Analytics Customer Support Center requesting assistance in resolving issues with the upgrade.

Step	Task
1	Run the options listed below from the Horizon Business Insight Support Page. • Component Instantiation Test • Show Server License Information • Email Test • SQL Information and Check • Show Install Paths To access the Support page, first log into the Horizon Business Insight Administrator web site. Then, modify the text shown in the Address field in your browser as shown below: http://[*yourservername*]/wtadmin/include/support.asp If you encounter problems with any of the options listed above, use the **Email this page** option on the Support page to gather the information necessary for the Performance Analytics Customer Support center to assist you. Refer to the chapter about the HBI Support Page in the document entitled *Optional Configuration Guidelines for Horizon Business Insight*.
2	Log into the HBI Viewer website and verify that existing highlights, reports, resources and scorecards can be opened.
3	From an open highlight, select **Print** and verify that the highlight display is properly printed as a PDF.
4	Log into the HBI Administrator website and grant the **Public Dashboard Access** privilege to the wtadmin account.
5	Log into the HBI Viewer website and click on **Dashboard** located at the top of the page. The Public Dashboard Welcome portlet is displayed. **Note:** You may experience a delay of about thirty seconds when attempting to open the Dashboard for the first time from your workstation.
6	At this point, you can log into the HBI Administrator website and grant the applicable dashboard-related privileges to the users you want to have access to the Personal Dashboard, the Public Dashboard and Dashboard Administration.

Once you have completed the steps above, move on to the final task on the following page.

Update your HBI information with PA Customer Support

Once you have verified that your Horizon Business Insight system has been properly upgraded, McKesson strongly recommends that you notify the Performance Analytics Customer Support Center.

Use the HBI Support Page to do so.

Step	Task
1	Log into the Horizon Business Insight Administrator web site.
2	Modify the text shown in the Address field in your browser as shown below to access the HBI Support page: http://[*yourservername*]/wtadmin/include/support.asp
3	Select **HBI Upgrade Information** from the drop down list of Support Page options.
4	Enter the information requested on the page: • Customer/Hospital Name • Customer/Enterprise ID (*optional*)
5	Use the e-mail option on the Support page to send the information to: *hbiupgrade@mckesson.com* If you cannot send e-mail outside of your organization, e-mail the page to yourself and then forward it to the address above.
6	Click **OK**.

You have now completed the installation of Horizon Business Insight 15.0.

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Optional configuration guidelines for Horizon Business Insight

Information and instructions related to the Horizon Business Insight configuration topics listed below can be found in the document entitled *Optional Configuration Guidelines for Horizon Business Insight*.

- Browser Settings for Internet Explorer and Firefox
- Installing Java Runtime Client for the Subset Editor
- Horizon Business Insight Server Configuration window
- Horizon Business Insight Support Page
- Configuring the Horizon Portlets for use with the Horizon^WP Physician Portal
- Loading the HPM_System_ Monitoring_Statistics script
- Changing the HBI splash screen
- Setting MIME types mapping
- Create a local FTP account
- Activating SSL
- Configure Multi-Entity Root Folder functionality
- User Authentication and Passwords
- Backup and Restore Guidelines

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