MCKESSON
Empowering Healthcare

Performance Analytics

Powered by Horizon Business Insight

**Migrating your Horizon Business Insight System
to a New Environment**

Release 15.0
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About this document

This document has been prepared for Horizon Business Insight customers who intend to migrate their existing Horizon Business Insight 11.2 or 14.0 system to a new environment.

Important: In order to properly complete the migration processes described in this document it is essential that you be logged into the Horizon Business Insight server(s) with full system administrator rights.

Migration scenarios addressed in this document

Single-server and multi-server customers in any of the following migration scenarios can use the processes and information described in this document.

Existing HBI version\Server environment	Target HBI version/Server environment
HBI: 11.2 Server: Windows 2003, 32-bit/SQL 2000	HBI: 15.0 Server: Windows 2003, 32-bit or 64-bit/SQL 2005
HBI: 11.2 Server: Windows 2003, 32-bit/SQL 2005	HBI: 15.0 Server: Windows 2003, 32-bit or 64-bit/SQL 2005
HBI: 11.2 Server: Windows 2003, 32-bit/SQL 2000	HBI: 15.0 Server: Windows 2008, 64-bit/SQL 2008
HBI: 11.2 Server: Windows 2003, 32-bit/SQL 2005	HBI: 15.0 Server: Windows 2008, 64-bit/SQL 2008
HBI: 14.0 Server: Windows 2003, 32-bit/SQL 2005	HBI: 15.0 Server: Windows 2003, 64-bit/SQL 2005
HBI: 14.0 Server: Windows 2003, 32-bit/SQL 2005	HBI: 15.0 Server: Windows 2008, 64-bit/SQL 2008
HBI: 14.0 Server: Windows 2003, 64-bit/SQL 2005	HBI: 15.0 Server: Windows 2008, 64-bit/SQL 2008

If your situation is not listed in the table above, log an ICSS service order for the Performance Analytics Customer Support Center to engage assistance with migrating your Horizon Business Insight system to a new environment.

For information about how McKesson can help you upgrade or migrate your current HBI environment, please contact our sales team at 1-800-469-4262.

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Choose a migration method

This document provides you with the information you need to move your existing Horizon Business Insight system from release 11.2 or 14.0 to a new 15.0 environment.

This chapter describes two methods for migrating your existing Horizon Business Insight system.

IMPORTANT: It is essential that your read this entire document and determine which methodology is best for your organization <u>before</u> you perform any installation or upgrade procedures on your Horizon Business Insight server(s).

The table below provides a brief description of each of the migration methods.

Method	Description	See page
"Method 1: Migrate then upgrade the databases"	Use Method 1 to migrate your existing Horizon Business Insight 11.2 or 14.0 databases to your newly built Horizon Business Insight 15.0 environment and then upgrade the databases to release 15.0. When you use this method to migrate to a new environment, your 11.2 or 14.0 data is retained on your existing server and is available if necessary.	1-1
"Method 2: Upgrade then migrate the databases"	Use Method 2 to upgrade your existing Horizon Business Insight 11.2 or 14.0 databases to release 15.0 and then migrate them to your newly built Horizon Business Insight 15.0 environment. When you use this method to migrate to a new environment, your 11.2 or 14.0 data is no longer available.	2-1

Note: In order to successfully utilize Method 2, you must upgrade your existing databases to your target version of SQL Server, i.e., SQL Server 2005 or 2008. Therefore, if you are currently running HBI 11.2 in a Windows 2003/SQL Server 2000 environment and intend to migrate directly to HBI 15.0 in a Windows 2008/ SQL Server 2008 environment, McKesson strongly recommends that you use Method 1.

When you have chosen a method, move on to the applicable page noted in the table above.

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Method 1: Migrate then upgrade the databases

This chapter provides you with the procedures and information you need to migrate your HBI 11.2 or 14.0 system using:

Method 1: Migrate your existing Horizon Business Insight 11.2 or 14.0 databases to your newly built Horizon Business Insight 15.0 environment and then upgrade the databases to release 15.0.

When you use this method to migrate to a new environment, your 11.2 or 14.0 data is retained on your existing server and is available if necessary.

Depending on your specific migration scenario (see About this document), the procedures in this chapter may differ slightly. Be sure to read all informational and procedural text carefully.

Method 1: Overview

Use Method 1 to migrate your existing Horizon Business Insight 11.2 or 14.0 databases to your newly built Horizon Business Insight 15.0 environment and then to upgrade the databases to release15.0.

The table below lists the procedures involved in this migration method.

Process	See Page
Method 1: Review important information	1-2
Method 1: Pre-migration tasks in the existing HBI 11.2 or 14.0 environment	1-3
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Method 1: Install HBI 15.0 software in your new environment	1-4
Method 1: Migration tasks in your new HBI 15.0 environment	1-5
Method 1: Test Horizon Business Insight 15.0 in the new environment	1-11

Before you begin, be sure to read the all of this chapter with special attention to the Method 1: Review important information section on page 1-2.

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Method 1: Review important information

Be sure to review the following information about your Horizon Business Insight environment before you begin any of the migration processes in this chapter:

1 You must run the entire Horizon Business Insight 15.0 installation from either a Local Administrator or a Domain Administrator account.

- For a domain server setup, you must use a Domain "Administrator" account.
- For a local server setup, you must use a Local "Administrator" account.

Note: Do NOT use a self-created user with Administrative privileges.

2 McKesson recommends that you NOT change the servername after you have installed IIS on the new server. Renaming may result in issues with IIS.

Accordingly, you must determine the name and partition configuration for your new server before you begin the installation procedures. *You cannot repartition the server after you have begun the installation.*

3 The Horizon Business Insight 15.0 Installation executable <u>and</u> the Upgrade executable files are required to complete the migration of your databases from your 11.2 or 14.0 environment to the new15.0 environment.

The install and the upgrade software executable file for Horizon Business Insight 15.0 can be downloaded from McKesson's Download Central web site. The HBI 15.0 software install and upgrade executable files also include all of the files you need to complete the migration processes described in this chapter. When you begin the migration procedures, be sure to use the files found in the location noted below:

c:\TempHBI\HBI 15.0\Server Migration Files\

4 McKesson recommends that you use the existing drive letters for all folders when you install the software in your new environment. If that is not possible, you will need to run the ***Disk Letter Change.sql*** script. Information is provided in the appropriate section of this chapter.

5 If the STAR Key Performance Indicators (KPI) package or STAR Standard Content package has been installed on the server, contact Performance Management Technical Support to obtain a list of required tasks associated with these products.

6 If you are currently running DTS packages that were created and saved in SQL 2000, you cannot directly migrate these packages. Instead, you must follow the instructions provided in the appendix of the document entitled, *Using the Standard DTS Templates to Import Data.*

7 Do not attempt to test your new Horizon Business Insight system until you have completed all of the migration procedures in this chapter.

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Method 1: Pre-migration tasks in the existing HBI 11.2 or 14.0 environment

The tasks in this section are performed in your existing HBI 11.2 or 14.0 environment <u>before</u> you perform any of the procedures described in this chapter.

IMPORTANT: Be sure to read this section in its entirety before you perform any installation or upgrade procedures on your Horizon Business Insight server(s).

1 Determine which servers and/or users are sending files to the existing Horizon Business Insight server environment via NFS, FTP, or Windows mapped drives. Notify the appropriate users of the upcoming server migration.

> **Note:** If a TRENDSTAR server is sending files to this HBI server via an NFS mount point, contact Performance Management Technical Support and request that the NFS mount be remapped to the new drive letter.

2 Determine if new NFS Maestro Server software, including a license, needs to be obtained from Hummingbird.

3 Make a note of your Horizon Business Insight License Key. Refer to the chapter, "Horizon Business Insight Support Page" in the 15.0 document entitled, *Optional Configuration Guidelines for Horizon Business Insight* for instructions on running the **Show Server License Information**.

4 If present, record all NFS export configuration settings for any folders in the X:\WebTREND*.* (or X:\HBI*.* on post 11.0 installations) folder structure, especially WTFiles and WTReports.

5 Record all Share and Security settings for any folders in the X:\WebTREND*.* (or X:\HBI*.* on post 11.0 installations) folder structure.

6 Open your IIS software and check for any FTP virtual folders that may need to be recreated on the new server.

7 Back up the items listed below. Be sure to store all backup files in a location that is not on the Horizon Business Insight server.

- X:\WebTREND*.* (*or X:\HBI for systems installed at release 11.0 or later*)
- X:\Inetpub\wwwroot\WebTREND\Resource*.*
- Run a sql backup on the following databases (depending on your current HBI environment). Be sure to note the size and data file names:
  - For 11.2: WebCache, WebDATA, WebTREND
  - For 14.0: WebCache, WebDATA, WebTREND, WebPortal
- Custom DTS packages, if applicable.
- Customer Logo in IIS, if applicable.
- Scheduled jobs (right-click on scheduled jobs and copy from the server).

8 Perform full server and SQL backups prior to the move.

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Method 1: Install operating system in your new environment

The Horizon Business Insight 15.0 Documentation Library includes two installation guides. Be sure to select the applicable installation guide based on the operating system in your new environment: Windows 2003 or Windows 2008.

- *Installing HBI in a Microsoft Windows 2003 Server Environment*
- *Installing HBI in a Microsoft Windows 2008 Server Environment*

Once you have selected the applicable installation guide for your new environment, following the instructions in:

> Chapter 3: Install Operating System and Services

Method 1: Install Microsoft SQL Server in your new environment

Using the same installation guide that you selected above, follow the instructions in the chapter noted below to install the compatible version of Microsoft SQL Server in your new environment.

> Chapter 4: Install Microsoft SQL Server

IMPORTANT: If you are installing a new Windows 2003 Server environment, you must install Microsoft SQL Server 2005.

If you are installing a new Windows 2008 Server environment, you must install Microsoft SQL Server 2008.

Method 1: Install HBI 15.0 software in your new environment

Again, using the same guide that you selected above, follow the instructions in the chapter noted below to install the Horizon Business Insight 15.0 software in your new Windows 2005 Server or Windows 2008 Server environment.

Depending on whether you are installing your Horizon Business Insight system in a single-server or multi-server environment, be sure to follow the applicable instructions in the chapter.

> Chapter 5: Install Horizon Business Insight Software Components

It is important that you follow the procedure in Chapter 5 to verify the installation of the Horizon Business Insight 15.0 software and components.

Once you have completed the Horizon Business Insight 15.0 installation and verification, return to this document and continue with the migration tasks described in the following section.

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Method 1: Migration tasks in your new HBI 15.0 environment

Be sure to perform each of the tasks described in this section in your new environment <u>after</u> you have completed the installation of Horizon Business Insight 15.0 in your new environment.

Important: Read this section in its entirety before you perform any of the procedures described here.

Method 1: Restore databases

Restore the following SQL databases to the new environment (**overwrite**):

- For 11.2: WebCache, WebDATA and WebTREND
- For 14.0: WebCache, WebDATA, WebTREND and WebPortal

Method 1: Fix user accounts

1 In Microsoft SQL Server, reset the properties on the SQL *MTS_WTUSER* account login.

To do so, log into your Microsoft SQL Server 2005 or 2008 software, as appropriate to your server environment, and use the instructions in this step to create the correct login settings for the MTS_WTUSER account.

- Navigate to **Start/Programs/ Microsoft SQL Server/Microsoft SQL Server Management Studio** and connect to the server.
- In the tree-view, expand **Security** and then expand **Logins**.
- Select (domain or local) MTS_WTUSER login, then right-click and choose **Properties** from the shortcut menu.
- On the General tab, verify the settings as shown in the table below:

Login Name	(domain or local) MTS_WTUSER account
Authentication	Windows Authentication
Defaults - Database	WebTrend

- Select the Server Roles tab and verify that **sysadmin** is selected.

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- Select the User Mapping tab and verify that the **Database role membership** for each database is set as shown is the table.

Webcache	public, db_owner
Webdata	public, db_owner
Webtrend	public, db_owner

- Click **OK**.

2 In Microsoft SQL Server 2005 or 2008, create SQL user accounts by associating with appropriate logins. Follow the steps below to do so.

Note: If you are migrating from an HBI 11.2 environment, do not perform step (a) below to delete the SQL user logins. You must, however, perform step (b) to verify/update the SQL user logins as shown in the table below.

(a) Delete SQL user logins: In the tree-view, expand **Databases**, then ...

- select WebTREND/Security/Users and delete the *hbijboss* user.
- select WebCache/Security/Users and delete the *hbijboss* user.
- select WebData/Security/Users and delete the *hbijboss* user.
- select WebPortal/Security/Users and delete the *hbiportal* user.

(b) Add SQL user logins: In the tree-view, expand **Security**.

- Right-click on the hbijboss login and select **Properties**.
- Establish the Server Roles, User Mappings and Database role membership settings for the hbijboss user as shown in the table below.
- Repeat this step to establish the Server Roles, User Mappings and Database role membership settings for the hbiportal user as shown in the table below.

SQL User	Settings
hbijboss	Server Roles: public
	User Mapping: WebCache, WebData, WebTREND
	Database role membership: public and db_owner
hbiportal	Server Roles: public
	User Mapping: WebPortal
	Database role membership: public and db_owner

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Method 1: Execute database scripts on your SQL server

Follow the steps below to execute the database scripts on your SQL server.

1 Run the ***HBI SQLServerName Change.sql*** script to update the server name reference in "input_file" and "output_loc" fields of the WebData.dbo.wt_definition_info table. Follow the steps below to run the script.

- Open SQL Server Query Analyzer.

- Navigate to the following location on your new (SQL database) server:

  c:\TempHBI\HBI 15.0\Server Migration Files

- Open the ***HBI SQLServerName Change.sql*** script and modify as follows:
  - Replace [*OriginalServer*] with [*NameofExistingHBIserver*]
  - Replace [*NewServer*] with [*NameofNewHBIserver*]

- Run the script and save the output to a log file.

- Close the file <u>without saving</u>.

If you need assistance, log an ICSS service order for the Performance Analytics Customer Support Center.

2 On the SQL server, follow the steps below to run the database upgrade script(s).

During this step, 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.

If you are migrating from Horizon Business Insight 11.2, you must run both of the following .bat files:

  - *HBI_Upgrade_14_0.bat*
  - *HBI_Upgrade_15_0.bat*

Run the 14.0 script first, then repeat the process to run the 15.0 script.

If you are migrating from Horizon Business Insight 14.0, run only the following script.

  - *HBI_Upgrade_15_0.bat*

Follow the instructions below to run one or both scripts, as applicable to your situation.

- Browse to the location below:

  c:\TempHBI\HBI 15.0\Server Migration Files

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- Locate the ***HBI_Upgrade_XX_0.bat*** and double-click on the file to run it.
- When the process has completed, a log file, *HBI_XX_0_DBupgrade_log,* is created in the directory in which you ran the process as noted below: :

    c:\TempHBI\HBI 15.0\Server Migration Files\Install

    If you migrated from HBI 11.2, log files for both HBI 14.0 and HBI 15.0 are shown in the location noted above.

    Verify that the log file indicates that the upgrade has completed successfully. <u>Do not continue if the file indicates otherwise</u>; log an ICSS service order with Performance Analytics Customer Support Center immediately for assistance.

Method 1: Verify wtUsers Group

When you run the file noted in this procedure, it reads all users out of the WebTREND.dbo.Users table, verifies that each user is also a member of the wtUsers group and generates a log file to show the output results.

Note to multi-server customers: You must run this step on your <u>HBI server</u>.

Follow the instructions below on the applicable server.

1   Browse to the location shown below on your <u>HBI server</u>:

    c:\TempHBI\HBI 15.0\Server Migration Files

2   Double-click on the ***HBI_WTUsers_Check.exe*** and then click **Process**.

3   When the HBI wtUsers Group Verification Complete message is displayed, click **OK**.

4   View the log file at the location noted below:

    c:\HBI\WTLOG\Validate_WTUSERS_Group_[date]_[HH]_[MM].log

    If the log file indicates errors or you need assistance, log an ICSS service order with Performance Analytics Customer Support Center immediately.

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Method 1: Organization-specific tasks

1 On your new15.0 server (*not applicable to a new 32-bit server),* verify that the **wtscheduler.exe** is present in both of the directories noted below:

- C:\windows\syswow64\
- *C:\windows\system32* directory

If the file is not present in the *syswow64* directory, copy it the from the *system32* directory.

2 Copy your scheduled tasks from your old server to your new server.

- To do so, open the Scheduled Tasks folder on your old server and select the scheduled tasks. Right-click and select **Copy**.
- Transfer the copied files to the Scheduled Tasks folder on the new server.
- Test each task on the new server. If you receive a message that a task *cannot start*, open the task properties and reset the password for the account under which the task is being run.

3 Restore the following directories:

- WTFiles directory and below to X:\WebTREND\ *(or to X:\HBI\ on post 11.0 installations*).

  Warning: Restore only WTFiles and below; do not overwrite the X:\WebTREND or HBI folder.

- WTReports and below to X:\WebTREND\ *(or to X:\HBI\ on post 11.0 installations).*

  Warning: Restore only WTReports and below; do not overwrite the X:\HBI folder.

- Resources and below to X:\Inetpub\wwwroot\WebTREND\.

  Warning: Restore only Resource and below; do not overwrite the folders above it.

4 Verify the following are correct based on the information you collected in the Method 1: Review important information section on page 1-2 of this chapter.

- Security and Share settings on each folder.
- Configuration of the NFS exports; reconfigure, if necessary.
- IIS FTP Virtual Folders; create, if necessary.
- Update settings for STAR KPI and STAR Standard Content, if necessary.
- If applicable, log an ICSS service order with the Performance Analytics customer Support Center to remap the TRENDSTAR NFS mount to the new drive letters.

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5 If the drive letter for Reports on the new server is different than the drive letter on your existing server, run the ***HBI Disk Letter Change.sql*** script

- Locate the ***HBI Disk Letter Change.sql*** *script* in the following location perform the tasks listed below:

  c:\TempHBI\HBI 15.0\Server Migration Files

- Open the script and perform the following tasks
  - open the script and make the required edits
  - copy the script into SQL Query Analyzer
  - execute the script on the HBI server

If you need assistance with this step, log an ICSS service order for the Performance Analytics Customer Support Center.

6 Restore your customer logo, if applicable. Refer to the document entitled, *Optional Configuration Guidelines for Horizon Business Insight* for more information.

7 Restore custom DTS packages, if applicable. Before you restore these packages, refer to the instructions in the appendix of the document entitled, *Using the Standard DTS Templates to Import Data* for pertinent information.

8 Reboot the server.

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Method 1: Test Horizon Business Insight 15.0 in the new environment

Follow the steps below to verify that your Horizon Business Insight 15.0 software and components have been successfully migrated to your new environment.

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

Important: Do not attempt to test the software prior to completing all of the processes in this section. Your software will not function properly migration.

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 Subset Editor and import a file from the WTFiles directory.

5   Log into the HBI Administrator website and refresh your Reports and Resources.

While you are in the Administrator website, grant the desired dashboard-related privileges to the *wtadmin* account. Definitions of the dashboard privileges can be found in the online documentation in the Administrator website.

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6   Log into the HBI Viewer website and click on **Dashboard** located at the top of the page. The Public Dashboard Welcome portlet is displayed. You may experience a delay of about thirty seconds when attempting to open the Dashboard for the first time from your workstation.

7   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 Public Dashboard, Personal Dashboard and Dashboard Administration areas.

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Method 2: Upgrade then migrate the databases

This chapter provides you with the procedures and information you need to migrate your HBI 11.2 or 14.0 system using:

Method 2: upgrade your existing Horizon Business Insight 11.2 or 14.0 databases to release 15.0 and then migrate them to your newly built Horizon Business Insight 15.0 environment.

When you use this method to migrate to a new environment, your 11.2 or 14.0 data is no longer available.

Depending on your specific migration scenario (see About this document), the procedures in this chapter may differ slightly. Be sure to read all informational and procedural text carefully.

Method 2: Overview

Use Method 2 to upgrade your existing Horizon Business Insight 11.2 or 14.0 databases to release 15.0 and then to migrate them to your newly built Horizon Business Insight 15.0 environment. The procedures noted in the table can be found on the page indicated in the table.

Procedure	See Page
Method 2: Review important information	2-2
Method 2: Upgrade existing HBI environment to release 15.0	2-4
Method 2: Pre-migration tasks in upgraded HBI 15.0 environment	2-7
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Method 2: Test Horizon Business Insight 15.0 in the new environment	2-14

Before you begin be sure to read of of this chapter with special attention to the Method 2: Review important information section on page 2-2.

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Method 2: Review important information

Be sure to review the following information about your Horizon Business Insight environment before you begin any of the migration processes in this chapter:

1 Verify the compatibility of your hardware. It is your responsibility to contact your vendor to confirm compatibility of your hardware with the Microsoft Windows 2003 or Windows 2008 Server operating system.

You can verify software and hardware compatibility with Windows Server by running the compatibility option provided on the Microsoft Windows Server CD. The "Perform System Compatibility" option can be accessed from the Start menu.

This option provides only a preliminary check. Therefore, while the compatibility option will verify whether or not your server is compatible with the Microsoft Windows 2003 or 2008 operating system, we strongly recommend that you contact your hardware vendor to confirm compatibility before you proceed with the installation of Windows 2003 or 2008 on your server.

2 Coordinate appropriate downtime with your Horizon Business Insight users. Keep in mind month-end processing.

3 Determine which servers and/or users are sending files to your existing Horizon Business Insight server environment via NFS, FTP, or Windows mapped drives. Notify the appropriate users of the upcoming server migration.

Note: If a TRENDSTAR server is sending files to this HBI server via an NFS mount point, contact Performance Management Technical Support and request that the NFS mount be remapped to the new drive letter.

4 Determine if new NFS Maestro Server software, including a license, needs to be obtained from Hummingbird.

5 If present, record all NFS export configuration settings for any folders in the X:\WebTREND*.* (or X:\HBI*.* on post 11.0 installations) folder structure, especially WTFiles and WTReports.

6 Record all Share and Security settings for any folders in the X:\WebTREND*.* (or X:\HBI*.* on post 11.0 installations) folder structure.

7 Open your IIS software and check for any FTP virtual folders that may need to be recreated in the new environment.

8 McKesson recommends that you NOT change the servername after you have installed IIS on the new server. Renaming may result in issues with IIS.

Accordingly, you must determine the name and partition configuration for your new server before you begin the installation procedures. *You cannot repartition the server after you have begun the installation.*

9 McKesson recommends that you use the existing drive letters for all folders when you install the software in your new environment. If that is not possible, you will need to run the ***Disk Letter Change.sql*** script. Information is provided in the appropriate section of this chapter. This script can be found at the following location on your HBI server:

C:\TempHBI\HBI 15.0\Server Migration Files

10 If the STAR Key Performance Indicators (KPI) package or STAR Standard Content package has been installed on the server, contact Performance Management Technical Support to obtain a list of required tasks associated with these products.

11 If you are currently running DTS packages that were created and saved in SQL 2000, you cannot directly migrate these packages. Instead, you must follow the instructions provided in the appendix of the document entitled, *Using the Standard DTS Templates to Import Data*.

12 Do not attempt to test your new Horizon Business Insight system until you have completed all migration procedures in this chapter.

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Method 2: Upgrade existing HBI environment to release 15.0

When you use Method 2, you upgrade your existing Horizon Business Insight 11.2 or 14.0 system to Horizon Business Insight 15.0 before you migrate your databases to your new environment.

Perform the procedures described in the table below in your existing Horizon Business Insight 11.2 or 14.0 environment to upgrade to release 15.0.

IMPORTANT: If you are currently running Horizon Business Insight 11.2, you must upgrade first to release 14.0, then to release 15.0. You cannot upgrade directly to HBI 15.0.

Before you begin

Before you begin the procedures to upgrade you HBI 11.2 system to release 14.0, you must download the HBI 14.0 upgrade software and documentation files noted below from the Horizon Business Insight 14.0 area of McKesson's Download Central web site.

- HBI 14.0 Upgrade Software
- HBI 14.0 User Documentation and Instructions

Method 2: Upgrade existing HBI 11.2 environment to release 14.0

This section is required only for customers current running Horizon Business Insight 11.2.

Note: If you are already running HBI 14.0 in your existing environment, you can skip this section and move on to the next.

Using the HBI 14.0 upgrade software and the document entitled, *Horizon Business Insight 14.0 Installation and Upgrade Guide*, follow the upgrade procedures described in the chapters noted below in your existing HBI 11.2 environment.

- Chapter 3: Install or Upgrade your Windows Operating System and Services

  Be sure to apply all required Microsoft patches and hot fixes described in the chapter.

- Chapter 4: Install or Upgrade Microsoft SQL Server 2005

  IMPORTANT NOTES:

  In order to successfully use Method 2 to migrate your databases, you must upgrade your SQL Server software.

  HBI 14.0 is compatible only with Microsoft SQL Server 2005. You cannot run HBI 14.0 with other versions of the SQL Server software.

  Microsoft SQL Server 2005 was supported but not required with HBI 11.2. You may have already upgraded your database software when you upgrade to HBI 11.2.

- Chapter 5: Install or Upgrade Horizon Business Insight Software Components

  When you have completed the upgrade procedures in Chapter 5, you must test your HBI 14.0 system. It is essential that you follow the instruction in the section of the 14.0 upgrade guide entitled, "Verify upgrade of HBI software and components."

  If you find issues while testing your HBI 14.0 system, log an ICSS service order with the Performance Analytics Customer Support Center immediately.

  Do not continue with the migration procedures in this chapter until all issues have been resolved.

When your HBI 11.2 system have completed the upgrade to HBI 14.0, move on to the next section of this document to upgrade your HBI 14.0 system to release 15.0.

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Method 2: Upgrade existing HBI 14.0 environment to release 15.0

Perform the procedures described in this section to upgrade your existing HBI 14.0 server to release 15.0.

The instructions for completing the upgrade to HBI 15.0 are set forth in the *Horizon Business Insight 15.0 Upgrade Guide*. This document in included in the Horizon Business Insight Documentation LIbrary which can be downloaded from the Horizon Business Insight 15.0 area of McKesson's Download Central web site.

Using the *Horizon Business Insight 15.0 Upgrade Guide*, follow the procedures described in the chapters noted below in your existing HBI 14.0 environment.

- Chapter 2: Apply Required Operating System Security Patches and Hot Fixes

  You may have already applied the required Microsoft patches and hot fixes described in Chapter 2. McKesson recommends that you verify that these patches and hot fixes are present on your Horizon Business Insight system.

- Chapter 3: Apply Microsoft SQL Server 2005 Service Pack 3

  In order to successfully use Method 2 to migrate your databases, you <u>must</u> upgrade your SQL Server software.

- Chapter 4: Upgrade Horizon Business Insight Software Components

  When you have completed the upgrade procedures in Chapter 4, you must test your HBI 15.0 system. It is essential that you follow the instruction in the section of the 15.0 upgrade guide entitled, "Verify upgrade of HBI software components."

If you find issues while testing your HBI 15.0 system, log an ICSS service order with the Performance Analytics Customer Support Center immediately.

Do not continue with the migration procedures in this chapter until all issues have been resolved.

When your HBI 14.0 system has been successfully upgraded to HBI 15.0, move on to the next section of this document and follow the pre-migration steps in your upgraded Horizon Business Insight 15.0 environment.

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Method 2: Pre-migration tasks in upgraded HBI 15.0 environment

Follow the steps below in the upgrade Horizon Business Insight 15.0 environment to safeguard your databases and prepare for migration.

1 Make a note of your Horizon Business Insight License Key.

Refer to the chapter, "Horizon Business Insight Support Page" in the 15.0 document entitled, *Optional Configuration Guidelines for Horizon Business Insight* for instructions on running the **Show Server License Information**.

2 Back up the items listed below. Be sure to store all backup files in a location that is not on the Horizon Business Insight server.

- X:\WebTREND*.* (*or X:\HBI for systems installed at release 11.0 or later*)
- X:\Inetpub\wwwroot\WebTREND\Resource*.*
- Run a SQL backup on the following 15.0 databases. Be sure to note the size and data file names:
  - WebCache
  - WebDATA
  - WebTREND
  - WebPortal
- Custom DTS packages, if applicable.
- Customer Logo in IIS, if applicable.
- Scheduled jobs (right-click on scheduled jobs and copy them from the server).

3 Collect the following server information.

- Server Name
- TCP/IP configuration information such as IP, DNS, WINS and all other information you might need after the Windows 2003 64-bit environment is installed.

4 Perform full server and SQL backups prior to the move.

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Method 2: Install operating system in your new environment

The Horizon Business Insight 15.0 Documentation Library includes two installation guides. Be sure to select the applicable installation guide based on the operating system in your new environment: Windows 2003 or Windows 2008.

- *Installing HBI in a Microsoft Windows 2003 Server Environment*
- *Installing HBI in a Microsoft Windows 2008 Server Environment*

Once you have selected the applicable installation guide for your new environment, following the instructions in:

Chapter 3: Install Operating System and Services

Method 2: Install Microsoft SQL Server in your new environment

Using the same installation guide that you selected above, follow the instructions in the chapter noted below to install the compatible version of Microsoft SQL Server in your new environment.

Chapter 4: Install Microsoft SQL Server

IMPORTANT: If you are installing a new Windows 2003 Server environment, you must install Microsoft SQL Server 2005.

If you are installing a new Windows 2008 Server environment, you must install Microsoft SQL Server 2008.

Method 2: Install HBI 15.0 software in your new environment

Again, using the same guide that you selected above, follow the instructions in the chapter noted below to install the Horizon Business Insight 15.0 software in your new Windows 2005 Server or Windows 2008 Server environment.

Depending on whether you are installing your Horizon Business Insight system in a single-server or multi-server environment, be sure to follow the applicable instructions in the chapter.

Chapter 5: Install Horizon Business Insight Software Components

It is important that you follow the procedure in Chapter 5 to verify the installation of the Horizon Business Insight 15.0 software and components.

Once you have completed the Horizon Business Insight 15.0 installation and verification, return to this document and continue with the migration tasks described in the following section.

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Method 2: Post-migration tasks in the new HBI 15.0 environment

Be sure to perform each of the tasks described in this section in your new environment <u>after</u> you have completed the installation of Horizon Business Insight 15.0 in your new environment.

Important: Be sure to read this section in its entirety before you perform any of the procedures described in this section.

Method 2: Restore databases

Restore the following 15.0 SQL databases to the new environment (**overwrite**):

- WebCache
- WebDATA
- WebTREND
- WebPortal

Method 2: Fix user accounts

1   In Microsoft SQL Server 2005 or 2008, reset the properties on the SQL *MTS_WTUSER* account login. To do so, log into your Microsoft SQL Server 2005 or 2008 software and use the instructions in this step to create the corrrect login settings for the MTS_WTUSER account.

- Navigate to **Start/Programs/ Microsoft SQL Server/Microsoft SQL Server Management Studio** and connect to the server.
- In the tree-view, expand **Security** and then expand **Logins**.
- Select (domain or local) MTS_WTUSER login, then right-click and choose **Properties** from the shortcut menu.
- On the General tab, verify the settings as shown in the table below:

Login Name	(domain or local) MTS_WTUSER account
Authentication	Windows Authentication
Defaults - Database	WebTrend

- Select the Server Roles tab and verify that **sysadmin** is selected.

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- Select the User Mapping tab and verify that the **Database role membership** for each database is set as shown is the table.

Webcache	public, db_owner
Webdata	public, db_owner
Webtrend	public, db_owner

- Click **OK**.

2 In Microsoft SQL Server 2005 or 2008, create SQL user accounts by associating with appropriate logins. Follow the steps below to do so.

(a) Delete SQL user logins: In the tree-view, expand Databases, then ...

- select WebTREND/Security/Users and delete the *hbijboss* user.
- select WebCache/Security/Users and delete the *hbijboss* user.
- select WebData/Security/Users and delete the *hbijboss* user.

(b) Add SQL user logins: In the tree-view, expand **Security**.

- Right-click on **Logins** and select **Properties**.
- Establish the Server Roles, User Mappings and Database role membership settings for the hbijboss user as shown in the table below.
- Repeat this step to establish the Server Roles, User Mappings and Database role membership settings for the hbiportal user as shown in the table below.

SQL User	Settings
hbijboss	Server Roles: public
	User Mapping: WebCache, WebData, WebTREND
	Database role membership: public and db_owner
hbiportal	Server Roles: public
	User Mapping: WebPortal
	Database role membership: public and db_owner

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Method 2: Update server name

When you run the file noted in this procedure, it updates the server name reference in "input_file" and "output_loc" fields of the WebData.dbo.wt_definition_info table.

Follow the steps below to run the script.

1   Open SQL Server Query Analyzer.

2   Navigate to the following location on your new (SQL database) server:

   c:\TempHBI\HBI 15.0\Server Migration Files

3   Open the *HBI SQLServerName Change.sql* script and modify as follows:

   -   Replace [*OriginalServer*] with [*NameofExistingHBIserver*]

   -   Replace [*NewServer*] with [*NameofNewHBIserver*]

4   Run the script and save the output to a log file.

5   Close the file <u>without saving</u>.

If you need assistance, log an ICSS service order for the Performance Analytics Customer Support Center.

Method 2: Verify wtUsers Group

When you run the file noted in this procedure, it reads all users out of the WebTREND.dbo.Users table, verifies that each user is also a member of the wtUsers group and generates a log file to show the output results.

   Note to multi-server customers: You must run this step on your <u>HBI server</u>.

Follow the instructions below on the applicable server.

1   Browse to the location shown below on your <u>HBI server</u>:

   c:\TempHBI\HBI 15.0\Server Migration Files

2   Double-click on the *HBI_WTUsers_Check.exe* and then click **Process**.

3   When the HBI wtUsers Group Verification Complete message is displayed, click **OK**.

4   View the log file at the location noted below:

   c:\HBI\WTLOG\Validate_WTUSERS_Group_[date]_[HH]_[MM].log

   If the log file indicates errors or you need assistance, log an ICSS service order with Performance Analytics Customer Support Center immediately.

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Method 2: Organization-specific tasks

1   On your new15.0 server (*not applicable to a new 32-bit server),* verify that the **wtscheduler.exe** is present in both of the directories noted below:

  -   C:\windows\syswow64\

  -   *C:\windows\system32* directory

If the file is not present in the *syswow64* directory, copy it the from the *system32* directory.

2   Copy your scheduled tasks from your old server to your new server.

  •   To do so, open the Scheduled Tasks folder on your old server and select the scheduled tasks. Right-click and select **Copy**.

  •   Transfer the copied files to the Scheduled Tasks folder on the new server.

  •   Test each task on the new server. If you receive a message that a task *cannot start*, open the task properties and reset the password for the account under which the task is being run.

3   Restore the following directories:

  •   WTFiles directory and below to X:\WebTREND\ *(or to X:\HBI\ on post 11.0 installations*).

  Warning: Restore only WTFiles and below; do not overwrite the X:\WebTREND or HBI folder.

  •   WTReports and below to X:\WebTREND\ *(or to X:\HBI\ on post 11.0 installations).*

  Warning: Restore only WTReports and below; do not overwrite the X:\HBI folder.

  •   Resources and below to X:\Inetpub\wwwroot\WebTREND\.

  Warning: Restore only Resource and below; do not overwrite the folders above it.

4   Verify the following are correct based on the information you collected in the Method 2: Review important information section on page 2-2 of this chapter.

  •   Security and Share settings on each folder.

  •   Configuration of the NFS exports; reconfigure, if necessary.

  •   IIS FTP Virtual Folders; create, if necessary.

  •   Update settings for STAR KPI and STAR Standard Content, if necessary.

  •   If applicable, log an ICSS service order with the Performance Analytics Customer Support Center to remap the TRENDSTAR NFS mount to the new drive letters.

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5 If the drive letter for Reports on the new server is different than the drive letter on your existing server, run the ***Disk Letter Change.sql*** script

- Locate the ***Disk Letter Change.sql*** *script* in the following location perform the tasks listed below:

  c:\TempHBI\HBI 15.0\Server Migration Files

- Open the script and perform the following tasks
  - open the script and make the required edits
  - copy the script into SQL Query Analyzer
  - execute the script on the HBI server

If you need assistance with this step, log an ICSS service order for the Performance Analytics Customer Support Center.

6 Restore your customer logo, if applicable. Refer to the document entitled, *Optional Configuration Guidelines for Horizon Business Insight* for more information.

7 Restore custom DTS packages, if applicable. Before you restore these packages, refer to the instructions in the appendix of the document entitled, *Using the Standard DTS Templates to Import Data* for pertinent information.

8 Reboot the server.

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Method 2: Test Horizon Business Insight 15.0 in the new environment

Follow the steps below to verify that your Horizon Business Insight 15.0 software and components have been successfully migrated to your new environment.

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

Important: Do not attempt to test the software prior to completing all of the processes in this section. Your software will not function properly migration.

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 Subset Editor and import a file from the WTFiles directory.

5   Log into the HBI Administrator website and refresh your Reports and Resources.

   While you are in the Administrator website, grant the desired dashboard-related privileges to the *wtadmin* account. Definitions of the dashboard privileges can be found in the online documentation in the Administrator website.

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6   Log into the HBI Viewer website and click on **Dashboard** located at the top of the page. The Public Dashboard Welcome portlet is displayed. You may experience a delay of about thirty seconds when attempting to open the Dashboard for the first time from your workstation.

7   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 Public Dashboard, Personal Dashboard and Dashboard Administration areas.

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