

Performance Analytics

Powered by Horizon Business Insight



Installing HBI in a Microsoft Windows 2003
Server Environment

Release 15.0
April 2010

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Chapter 1: Before you Begin

This manual provides information and instructions for Horizon Business Insight™ customers who are installing Horizon Business Insight for the first time in a Microsoft Windows 2003 server environment with Microsoft SQL Server 2005.

Important installation information

Before you begin, please read this chapter in its entirety. 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:

- Single server environment - Customers who intend to run Horizon Business Insight in a single server environment have the Horizon Business Insight software and the Microsoft SQL 2005 Server software installed on the same Windows 2003 server (referred to as the Horizon Business Insight or HBI server or the application server).
- Multi-server environment - Customers who intend to run Horizon Business Insight in a multi-server environment have the Horizon Business Insight software installed on a Windows 2003 server (referred to as the Horizon Business Insight server or the application server). The Microsoft SQL 2005 Server software is installed on a different Windows 2003 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 both the application server and the SQL database server booted up and running throughout the entire installation process described in this document.

Full system administrator rights required

In order to properly complete the processes described in this manual, you must be logged into the Horizon Business Insight server(s) with full system administrator rights.

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 2003 Server Standard Edition (or R2) with Service Pack 2
- Microsoft SQL Server 2005 (Standard or Enterprise Edition)
- You must have downloaded the current release of the Horizon Business Insight installation software for Windows 2003 from the McKesson Download Central website. Verify that the you have downloaded the executable for Windows 2003 installations. Be sure you know the network location where the software was stored during the download process.

IMPORTANT! installation location for HBI software components

McKesson recommends that you do not begin the installation process until you have determined how you want to partition your Horizon Business Insight server and the drive letter(s) to which you intend to install each of the components listed below.

The components can be installed on the same drive or on different drives on the Horizon Business Insight server as determined by your organizational security policies. However, once you select the drives and set the paths, you cannot make modifications.

- 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)

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.

Note: 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.

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.

Important: 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 2003 and SQL
- 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)

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 bolded in the list below.

Name	Description
<i>Installing HBI in a Microsoft Windows 2003 Server Environment</i>	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
<i>Installing HBI in a Microsoft Windows 2008 Server Environment</i>	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
<i>Upgrading Horizon Business Insight in a Windows 2003 Environment</i>	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.
<i>Migrating your Horizon Business Insight System to a New Environment</i>	Instructions and information about migrating your existing Horizon Business Insight 11.2 or 14.0 system to a new environment
<i>Optional Configuration Guidelines for Horizon Business Insight</i> The chapters in this guide were previously included as appendices in the HBI Installation and Upgrade Guide	Instructions and information about the following: <ul style="list-style-type: none"> • 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

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 2003 server environment.

IMPORTANT: If you intend to run Horizon Business Insight 15.0 in a Microsoft Windows 2008 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 2008 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 2003 environment.

- Microsoft Windows 2003 Service Pack 2 (32-bit or 64-bit server) and all required hot fixes and security patches described in the section beginning on page 3-3.
- Microsoft SQL Server 2005 (Standard or Enterprise Edition) with SP3
- IIS 6.0 (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:

- For a domain server setup, you must use a Domain Administrator privileged account.
- For a local server setup, you must use a Local Administrator account.
- Multi-server customers must install Windows 2003 on the database server as well as the application server.

Chapter 3: Install Operating System and Services

This chapter provides you with the information you need to bring the operating system and related services on your server(s) to the level required to properly run Horizon Business Insight release 15.0. .

IMPORTANT: If you intend to run Horizon Business Insight 15.0 in a Microsoft Windows 2008 Server environment with Microsoft SQL Server 2008, 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 2008 Server Environment*.

The following topics are discussed in this chapter.

Topic	See Page
Install Windows 2003 Server, Service Pack 2 and required hot fixes	3-2
Operating system security patches and hot fixes	3-3
Download and install the Microsoft .NET Framework on HBI server	3-5
Internet Information Services (IIS)	3-6
Set Regional Options on the server (for US and UK)	3-8

You must perform all of the procedures described in this chapter before you install the Horizon Business Insight 15.0 software.

Install Windows 2003 Server, Service Pack 2 and required hot fixes

The Windows 2003 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.

If you have any problems during the installation of Windows 2003 Server, contact your hardware manufacturer (HP, IBM) or Microsoft for assistance.

During the installation of Windows 2003 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 2003 Server Terminal Services in an Application Mode.
 - Windows 2003 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 2003 options, note that additional resources, memory and CPU time may be required.
-

Procedures

Step	Task
1	Install Windows 2003 Server. Use the Windows 2003 CD that was provided with your server to install the operating system. Follow the instructions provided by Microsoft to do so.
2	Apply Windows 2003 Service Pack 2. Go to the Microsoft website at www.microsoft.com and download Windows 2003 Service Pack 2 and apply the service pack to the server.
3	Apply the Microsoft hot fixes described in the next section of this document.

Operating system security patches and hot fixes

The Horizon Business Insight 15.0 software has been validated against critical Windows security and hot fix patches received from Microsoft through the release date of Horizon Business Insight 15.0.

Certain Windows patches and hot fixes are required in order to run your operating system properly with Horizon Business Insight while others are discretionary. All patches and hotfixes are available from Microsoft.

Required operating system hot fixes and security patches

This sections describes security patches and hot fixes that you must apply to your server(s) in order to properly run your operating system with Horizon Business Insight 15.0.

Be sure to apply these patches and hot fixes before you install your Horizon Business Insight software.

32-bit servers

- Hot fix #936296

Obtain and apply Critical Microsoft Server SP2 hot fix #936296 to the server.

As of this writing, Microsoft has not yet included hot fix #936296 in a Windows 2003 Server service pack. You will be notified via product alert from Performance Management Technical Support when the service pack which includes this hot fix is available from Microsoft.

In the meantime, contact Microsoft at 1-800-642-7676 to request hotfix #936296.

- Hot fix #934016 - Availability of Windows Server 2003 Post-Service Pack 2 COM+ 1.5 Hotfix Rollup Package 12.

Contact Microsoft by phone at 1-800-642-7676 and request the file for hot fix 934016 for 32-bit environment.

- Hot fix #940284 - When you use Internet Explorer 7 to visit a Web site that includes certain VBScript functions, Internet Explorer 7 may crash.

Contact Microsoft by phone at 1-800-642-7676 and request the file for hot fix 940284 for a 32-bit environment.

64-bit servers

- Hot fix #936296

Obtain and apply Critical Microsoft Server SP2 hot fix #936296 to the server.

As of this writing, Microsoft has not yet included hot fix #936296 in a Windows 2003 Server service pack. You will be notified via product alert from Performance Management Technical Support when the service pack which includes this hot fix is available from Microsoft.

In the meantime, contact Microsoft at 1-800-642-7676 to request hotfix #936296.

- Hot fix #934016 - Availability of Windows Server 2003 Post-Service Pack 2 COM+ 1.5 Hotfix Rollup Package 12.

Contact Microsoft by phone at 1-800-642-7676 and request the file for hot fix 934016 for a 64-bit environment.

- Hot fix #940284 - When you use Internet Explorer 7 to visit a Web site that includes certain VBScript functions, Internet Explorer 7 may crash.

Contact Microsoft by phone at 1-800-642-7676 and request the file for hot fix 940284 for a 64-bit environment.

Additional operating system security patches

If you choose to apply other Microsoft service packs, patches or fixes, in addition to those described above as required critical hotfixes, you do so with the understanding that Performance Management Technical Support 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.

Download and install the Microsoft .NET Framework on HBI server

This section is required only for customers in a multi-server environment. Follow the procedures below to install the Microsoft .NET Framework package on your application server.

Single-server customers can skip this section. The required Microsoft .NET Framework was included with the installation of the Microsoft SQL 2005 software.

IMPORTANT: You must download and install the 32-bit or 64-bit framework package, as appropriate, depending on your operating system.

Step	Task		
1	Access the Download page of the Microsoft web site at: www.microsoft.com/downloads		
2	Use the information below to search for and select the proper framework package depending on whether you are installing HBI 15.0 on a 32-bit or a 64-bit server		
	For this server type	Type the following into the Search field and click Go..	Select the following package from the search results web page... Click on the link to download the package to your HBI server...
	32-bit	.Net Framework 2.0	.NET Framework Version 2.0 Redistributable Package (x86)
	64-bit	.Net Framework 2.0 for 64-bit	.NET Framework Version 2.0 Redistributable Package (x64)
3	Follow the instructions provided on the Download page of the web site to install the package on your HBI application server.		

Internet Information Services (IIS)

Windows 2003 does not automatically install the necessary IIS components on your server. Follow the instructions below 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.

Install IIS components

Step	Task
1	Right click on Start and select Properties . <ul style="list-style-type: none">• Select Classic Start menu• Click OK.
2	Click Start/Settings/Control Panel/Add or Remove Programs .
3	Click Add/Remove Windows Components . <ul style="list-style-type: none">• Highlight Application Server• Click Details.
4	Click on the following to select: <ul style="list-style-type: none">• Application Server Console• ASP.Net (<i>Customers in a 64-bit environment will not see ASP.Net</i>)• Enable Network Com+ Access• Enable Network DTC Access <p>Note to Multi-server customers: Be sure to activate all of the options in this step on the SQL server as well as on the HBI server.</p>

Step	Task
5	<p>Highlight Internet Information Services,</p> <ul style="list-style-type: none">• Click Details.• Select the following, and then click OK. Common Files Internet Information Services Manager SMTP Highlight World Wide Web Service, choose Details. Select the following and click OK. Active Server Pages World Wide Web Service. <ul style="list-style-type: none">• Click OK.• Click OK again.• Click Next to install the new components.
6	<p>If prompted to do so, insert the Windows 2003 installation CD in the CD-ROM drive on the server and click OK to continue.</p> <ul style="list-style-type: none">• Click Finish.• Close the Add/Remove Programs window.• Close the Control Panel window.
7	<p>Click Start/Programs/Administrative Tools/Internet Information Services (IIS) Manager.</p> <ul style="list-style-type: none">• Expand Internet Information Service (IIS)• Click Web Service Extensions.• Click Active Server Pages, then click Allow. (May already be set to Allow.)• Click ASP.NET, then click Allow. (May already be set to Allow.) <p>If there are two versions displayed, be sure both version are set to Allow.</p>
8	Close IIS Manager.

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.

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
	Regional Options	Standards and Formats Locations	English (United States) United States
	Language	Click Details/Default input language	English (United States) - US
	Advanced	Language for non-Unicode programs	English (United States)
4	Click Apply to save the settings on the various tabs.		
5	Click OK to close the Regional and Language Options window.		
6	Close the Control Panel.		

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: <ul style="list-style-type: none"> Standards and formats: Select <i>English (United Kingdom)</i> Location: Select <i>United Kingdom</i>
4	Select the Languages tab: <ul style="list-style-type: none"> Click Details. Click Add and choose the following: <i>English (United Kingdom)</i>. Click OK.
5	In the Default input language area select: <i>English (United Kingdom) - UK</i> . In the Installed services area, highlight <i>English (United States)</i> and click Remove .
6	Select the Advanced tab: <ul style="list-style-type: none"> For the Language for non-Unicode programs, select: <i>English (United Kingdom)</i>. In the Default User Account Settings, click on the checkbox to select the option to Apply all settings to the current user account and to the default user profile. Click OK.
7	Click Apply .
8	If prompted to reboot the server, click Yes . Otherwise, move on to the next chapter.

Chapter 4: Install Microsoft SQL Server

This chapter provides you with the Microsoft SQL Server 2005 settings that are required to run your Horizon Business Insight system properly.

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.

Topic	See Page
Install Microsoft SQL Server 2005	4-2
Apply Microsoft SQL Server 2005 Service Pack 3	4-4
Configure Microsoft SQL Server 2005 for Horizon Business Insight	4-5

Install Microsoft SQL Server 2005

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

In order to install the Microsoft SQL Server 2005 software to properly run Horizon Business Insight 15.0, accept all defaults during the upgrade process EXCEPT those on the windows indicated in the table below.

Note to installing Multi-server customers: The Microsoft SQL Server 2005 software and Service Pack 3 must be installed on your HBI database server.

Window Name	Required Selection
SQL Server 2005 START	Install > Server Components, Tools, Books Online, and Samples
Registration	Enter the requested information in the designated fields.
Components to Install	SQL Server Database Services Integration Services Workstation Components, Books Online and development tools
Service Account	Use the built-in System account SQL browser SQL Server SQL Server Agent
Authentication Mode	Mixed Mode (Windows Authentication and SQL Server Authentication). Note: An sa logon password is optional
Collation Settings on United States (US) servers	SQL Collations > Dictionary order, case sensitive, for use with 1252 Character Set. After you have completed the installation, Collation properties are displayed as: <i>SQL_Latin1_General_CP1_CS_AS</i>
Collation Designator on United Kingdom (UK) servers	UK - Accept default setting of Latin1_General with a sort order of Accent Sensitive (See Additional steps for UK customers following this table.)
Completing setup	Review the summary log and information displayed on this window. Note: Log files, including Summary.txt, are saved at the following location: C:\Program Files\Microsoft SQL Server\90\Setup Bootstrap\LOG\Files\

IMPORTANT: When you have completed, the installation of Microsoft SQL Server 2005 software, you must reboot the server.

Once you have rebooted the server, move on to the section entitled, [Apply Microsoft SQL Server 2005 Service Pack 3](#).

Additional steps for United Kingdom customers only

Once you have completed the installation of Microsoft SQL Server 2005, 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/ Microsoft SQL Server 2005/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. <ul style="list-style-type: none"> Type the following into the window: <pre>sp_configure 'default language',23 RECONFIGURE with override (case-sensitive)</pre> Click Execute. 						
4	Click New Query again: Type the following into the new window: <pre>sp_defaultlanguage sa, 'British'</pre> <ul style="list-style-type: none"> 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 border="1" data-bbox="479 1423 1421 1583"> <thead> <tr> <th>SQL command</th><th>Required parameters</th></tr> </thead> <tbody> <tr> <td>print@ @language</td><td>Language=British</td></tr> <tr> <td>print@ @langid</td><td>LangID = 23</td></tr> </tbody> </table>	SQL command	Required parameters	print@ @language	Language=British	print@ @langid	LangID = 23
SQL command	Required parameters						
print@ @language	Language=British						
print@ @langid	LangID = 23						

Once you have completed the steps above, move on to the section entitled, [Apply Microsoft SQL Server 2005 Service Pack 3](#).

Apply Microsoft SQL Server 2005 Service Pack 3

In order to properly run your Horizon Business Insight system, all HBI database servers must be running Microsoft SQL Server 2005 Service Pack 3.

Before you begin

The instructions in this section require that you download Microsoft SQL Server 2005 Service Pack 3 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 2005 Service Pack 3

During the installation, accept all defaults EXCEPT those shown on the windows indicated 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 2005 SP3 must indicate the version (9.00) and include notation of service pack 3 (SP3) as shown in the example here:

9.00.XXXX SP3 dated Mar 23, 2007 or later.

Configure Microsoft SQL Server 2005 for Horizon Business Insight

Once you have installed Microsoft SQL Server 2005 and applied Service Pack 3, you must set the SQL Server 2005 to autostart the MSSQLServer, SQL Server Agent and SQL Server Browser services.

Set Autostart SQL

Step	Task
1	Navigate to START/Programs/Microsoft SQL Server 2005/Configuration Tools/SQL Server Configuration Manager .
2	Highlight SQL Server 2005 Services and select SQL Server (MSSQLServer) . <ul style="list-style-type: none">• 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 click Start .
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 Browser from the shortcut menu in step 2.
6	Click OK to save the configuration and move on to the section below.

Set MSSQL Server protocols

Step	Task
1	Continuing from the steps above, in the tree-view, select the SQL Server 2005 Network Configuration/Protocols for MSSQL Server .
2	Right-click on Named Pipes and verify that this option is enabled (correcting the setting if necessary).
3	Restart the SQL Server service.
4	Verify that the Shared Memory and TCP/IP options are also enabled (correcting the settings, if necessary) and then click OK .
5	Close the SQL Server Configuration Manager .

Set recovery option

Only those customers installing Microsoft SQL Server 2005 for the first time must follow the steps below to set the required database size and recovery properties for use with the Horizon Business Insight system.

Step	Task
1	Navigate to Start/Programs/Microsoft SQL Server 2005/Microsoft SQL Server Management Studio and connect to the server.
2	Expand the tree view in the left pane, then expand Databases/System Databases . Right-click on Model and choose Properties .
3	On the Model Properties window: <ul style="list-style-type: none">• 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 manual entitled, [Install Horizon Business Insight Software Components](#).

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 Windows 2003 single-server or a multi-server environment.

Single server environment - An environment with the Horizon Business Insight software and the Microsoft SQL software installed on the same Windows 2003 SP2 server.

Multi-server environment - An environment with the Horizon Business Insight software and the Microsoft SQL software installed on separate Windows 2003 SP2 servers.

About this chapter

The table below lists the topics discussed in this chapter for customers installing Horizon Business Insight for the first time in a Windows 2003 environment.

You will find instructions for customers running HBI in a single-server and a multi-server environment. Be sure to read the introductory text and notes provided in each section before you step through the procedure.

Topic	See Page
Install procedures by environment type	5-3
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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

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 32-bit or 64-bit 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	Check environment parameters on the server
4	Install the HBI software
5	Install HBI websites
6	Perform manual configuration procedures for: <ul style="list-style-type: none">• 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
7	Establish HBI server configuration settings
8	Reboot the HBI server
9	Verify HBI installation process has completed successfully
10	Update your HBI information with PA Customer Support Center
11	Assess need for additional optional configuration of your HBI system

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 32-bit or 64 bit 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	Check environment parameters on the server
4	Install the HBI software
5	Install HBI websites
6	Perform manual configuration procedures for: <ul style="list-style-type: none"> • HBI Viewer • SMTP operator privilege • User rights for WTUsers • JBoss configuration • Security and share permissions for folders, subfolders, files
7	Establish HBI server configuration settings
8	Reboot the application server
	<i>The remaining steps in this table cannot be performed until you have completed all of the steps in the table below on the SQL database server.</i>
9	Verify that the HBI installation process has completed successfully
10	Update your HBI information with PA Customer Support
11	Assess need for additional optional configuration of your HBI system

Procedures necessary on the SQLdatabase server	
1	Enable DTC communications on the SQL database server
2	Check environment parameters on the server
3	Install databases and HBI components
4	Perform manual configuration procedures for: <ul style="list-style-type: none">• Add login to Microsoft SQL server• Security and share permissions for folders, subfolders, files
5	Establish HBI server configuration settings
6	Reboot the SQL server

Set Up active directory domain 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 a Horizon Business Insight 15.0 Windows 2003 server in an Active Directory Domain.

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 Full Administrator privileges.
- 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.
- 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/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. <ul style="list-style-type: none">• MTS_WTADMIN• MTS_WTUSER

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

MTS_WTADMIN account

Step	Task
1	From the Windows 2003 menu select Start/Programs/Administrative Tools/Active Directory Users and Computers .
2	Expand the domain and select Users . <ul style="list-style-type: none"> Right-click and select New/User.
3	On the New User window, set the following and then click Next :
	First name MTS_WTADMIN
	Last name HBI Administrator
	Full name HBI Administrator
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: <ul style="list-style-type: none"> 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:
	Local Administrators Group [your domain name.com]/Builtin
	Domain Users [your domain name.com]/Groups
	<p>Note: The Active Directory Folder will be specific to the domain where the Horizon Business Insight server is being installed.</p> <p>If you do not see the above assignments, click Add and follow the prompts to add the proper groups.</p>
8	Click Apply and then OK .

MTS_WTUSER

Step	Task	
1	From the Windows 2003 menu select Start/Programs/Administrative Tools/Active Directory Users and Computers .	
2	Expand the domain and select Users . <ul style="list-style-type: none"> Right-click and select New/User. 	
3	On the New User window, set the following and then click Next :	
	First name	MTS_WTUSER
	Last name	HBI COM+Packages
	Full name	HBI COM+Packages
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: <ul style="list-style-type: none"> 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:	
	Domain Users	[your domain name.com]/Groups
	Users	[your domain name.com]/Builtin
	<p>Note: The Active Directory Folder will be specific to the domain where the Horizon Business Insight server is being installed.</p> <p>If you do not see the above assignments, click Add and follow the prompts to add the proper groups.</p>	
8	Click Apply and then OK .	
9	Close the Administrative Tools/Active Directory Users and Computers window.	

Enable DTC communications

The DTC settings allow the HBI application to communicate directly with the database over the network. In some cases, the application of Service Pack 2 for Microsoft Windows 2003 server and/or certain of the Microsoft hot fixes may have disabled the required security settings necessary for proper communication.

All new installations of Horizon Business Insight must follow the instructions provided 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 both the HBI application server and on the database server.

Set Security Configuration properties

Step	Task		
1	Click Windows Start . <ul style="list-style-type: none">• Select Run.• In the Run window, type: dcomcnfg		
2	In the left pane, expand Component Services\Computers\My Computer . <ul style="list-style-type: none">• Right-click on My Computer.• Select Properties.• Select the MSDTC tab.• Click Security Configuration		
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 Enabled XA Transactions</td></tr></table>	Security Settings	Network DTC Access Enabled XA Transactions
	Security Settings	Network DTC Access Enabled XA Transactions	
	<table><tr><td>Client and Administration</td><td>Allow Remote Clients Allow Remote Administration</td></tr></table>	Client and Administration	Allow Remote Clients Allow Remote Administration
Client and Administration	Allow Remote Clients Allow Remote Administration		
<table><tr><td>Transaction Manager Communications</td><td>Allow inbound Allow outbound No authentication required</td></tr></table>	Transaction Manager Communications	Allow inbound Allow outbound No authentication required	
Transaction Manager Communications	Allow inbound Allow outbound No authentication required		
4	Click Yes to restart the service and then click OK at the prompt.		

Step	Task														
5	<p>On the same window:</p> <ul style="list-style-type: none"> Select My Computer. Right-click and select Properties. 														
6	<p>On the Properties window, open the COM Security tab.</p> <ul style="list-style-type: none"> 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. <table> <tr> <th>Account Name</th><th>Account Location</th></tr> <tr> <td>INTERACTIVE</td><td>Local</td></tr> <tr> <td>MTS_WTUSER</td><td>Domain or Local</td></tr> <tr> <td>SELF</td><td>Local</td></tr> <tr> <td>SYSTEM</td><td>Local</td></tr> </table>	Account Name	Account Location	INTERACTIVE	Local	MTS_WTUSER	Domain or Local	SELF	Local	SYSTEM	Local				
Account Name	Account Location														
INTERACTIVE	Local														
MTS_WTUSER	Domain or Local														
SELF	Local														
SYSTEM	Local														
7	<p>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:</p> <ul style="list-style-type: none"> 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. <table> <tr> <th>Account Name</th><th>Account Location</th></tr> <tr> <td>Administrators</td><td>Local</td></tr> <tr> <td>INTERACTIVE</td><td>Local</td></tr> <tr> <td>IUSR_[servername]</td><td>Local</td></tr> <tr> <td>IWAM_Server name (IWAM is not shown on database server in multi-server environment)</td><td>Local</td></tr> <tr> <td>MTS_WTUSER</td><td>Domain or Local</td></tr> <tr> <td>SYSTEM</td><td>Local</td></tr> </table>	Account Name	Account Location	Administrators	Local	INTERACTIVE	Local	IUSR_[servername]	Local	IWAM_Server name (IWAM is not shown on database server in multi-server environment)	Local	MTS_WTUSER	Domain or Local	SYSTEM	Local
Account Name	Account Location														
Administrators	Local														
INTERACTIVE	Local														
IUSR_[servername]	Local														
IWAM_Server name (IWAM is not shown on database server in multi-server environment)	Local														
MTS_WTUSER	Domain or Local														
SYSTEM	Local														
8	<p>If you make any changes to groups or users or the access or launch settings, you must reboot the server.</p>														

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 2003 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 2003 Servers. There are two executable zip files for Windows 2003 customers available for download from the McKesson Download Central web site. Be sure you download the installation software appropriate for your Windows 2003 server environment:
 - HBI 15.0 Installation Software for Windows 2003 for 32 bit servers
 - HBI 15.0 Installation Software for Windows 2003 for 64 bit servers

Once you have downloaded and saved the the applicable 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 2003 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.

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.

Run wtInstallCheck executable

Step	Task
1	<p>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\2003 [xx]bit.</p> <p><i>(where xx indicates either 32 bit or 64 bit as applicable to your server environment. You will only have one 2003 xxbit folder depending on whether you downloaded the Windows 2003 32bit or the Windows 2003 64 bit installation software from Download Central).</i></p> <ul style="list-style-type: none"> Double-click on the wtInstallCheck.exe to run it.
2	<p>On the Horizon Business Insight Version Check & Install Paths window, select HBI application server as your server type, then click Continue.</p> <p>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 (SQL Server) are provided later in this manual.</p>
3	<p>On the Horizon Business Insight Installation Version Checker window, you must provide the information described below.</p> <p>First, review the section, "IMPORTANT! installation location for HBI software components" on page 1-2 and review the notes below.</p> <ul style="list-style-type: none"> 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. <p>When you are certain of the drive letter(s) where you want the HBI components to reside, provide the information requested described below:</p>

Step	Task	
	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)\Com Plus Applications\HBI\
	HBI Data Files Path	This reflects the location where you intend to 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
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 .	
6	<p>When the HBI Installation Check window is displayed, choose one of the following:</p> <ul style="list-style-type: none"> • 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 <p>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.</p>	

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.

If the log file indicates that you do not have the proper version of ASP.NET installed on your HBI server, see [“Download and install the Microsoft .NET Framework on HBI server”](#) on page 3-5.

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.

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	Depending on whether you are installing in an 32-bit or a 64-bit environment, expand the applicable registry key noted below: <u>For 32-bit environments:</u> HKEY_LOCAL_MACHINE\SOFTWARE\McKesson HBOC\WebTREND <u>For 64-bit environments:</u> 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: <ul style="list-style-type: none">• ComPath key reflects value in <i>Com Plus Applications Path</i>• DataPath key reflects value in <i>HBI Data Files Path</i>• JBossPath key reflects value in <i>JBoss Path</i>• WebsitesPath key reflects value in <i>Web Sites Path</i>• DBServerName key reflects value in <i>Database Server Name</i>• LogPath and DataPath keys reflect value in <i>HBI Data Files Path</i>

Verify Windows directory setup

Step	Task
1	In Windows Explorer, navigate to: C:\HBI.
2	Verify that the following directories have been created: <ul style="list-style-type: none">• \Temp• \WTLog• \WtFiles• \WtReports
3	Navigate to the location noted below and open the file indicated: ...\WTLog\Install\HBI_Install_Check_[date].log Verify that the drive letter and paths for the COM+, HBI Data Files, JBoss and Websites are set as you intended.

STOP: If any of the paths are not correct in the log file, do not continue 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.

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	<p>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\2003 [xx]bit\</p> <p><i>(where xx indicates either 32 bit or 64 bit as applicable to your server environment. You will only have one 2003 xxbit folder depending on whether you downloaded the Windows 2003 32bit or the Windows 2003 64 bit installation software from Download Central).</i></p> <p>Depending on your environment, double-click on the applicable executable to run it.</p> <p>Please be patient. This file may take several minutes to run.</p>	
	Single-server	HBI_Single.exe
	Multi-server	HBI_Multi_HBI.exe
2	At the Install HBI 15.0 Introduction window, click Next to continue the installation.	
3	<p>When the Pre-Installation Summary is displayed:</p> <ul style="list-style-type: none">• Verify the accuracy of the installation information.• Click Install to continue. <p>Note: As the installation process proceeds, progress is displayed on your screen. Please be patient; this may take some time. Do not perform other activities on the server while the process is running.</p>	
4	<p>When prompted to load the HBI software, click Yes.</p> <p>When prompted to select the directory from which to load the packages, <u>you must select the default path shown below:</u></p> <p>C:\McKesson\HBI 15.0\Server\Packages</p> <p>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.</p>	
5	Click OK to continue.	

Step	Task
6	<p>Provide a Domain, Username and Password:</p> <ul style="list-style-type: none">• Enter the domain name for both the MTS_WTUSER and MTS_WTADMIN. <i>(If this is a local server, domain name is not applicable.)</i>• Enter each Username in the appropriate section.• Enter the password for each account. If it has changed recently, see your System Administrator. <p>The Com+ Package installation will proceed. When the installation has completed, you will see an HBI Installation Complete dialog box.</p> <ul style="list-style-type: none">• Click OK.
7	<p>You will be prompted to View Log or Exit.</p> <ul style="list-style-type: none">• 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. <p>The HBI software installation will continue to run.</p>
8	<p>Click Done when you are notified that the installation is complete.</p>

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

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	<ul style="list-style-type: none"> • Right-click on the <u>wtadmin</u> account and select Set Password • Change the password, as desired.
3	<ul style="list-style-type: none"> • 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. Do not make changes to the WTUSERS group.
- Two SQL login accounts with passwords:
 - hbiportal - *HBIportalpazz4*
 - hbijboss - *HBIjbosspace4*

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 do not 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:

- Single-server customers: Skip the section beginning on the following page and move on to the section entitled **Verify setup process** on page 5-25.
 - Multi-server customers: Move on the section beginning on the next page entitled **Install database server - SQL server (multi-server only)**.
-

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

Only customers installing Horizon Business Insight for the first time in a multi-server environment must complete the instructions in this section to install the required databases and Horizon Business Insight components on the SQL server.

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 SQL database server.

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 2003</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\2003 [xx]bit <i>(where xx indicates either 32 bit or 64 bit as applicable to your server environment. You will only have one 2003 folder depending on whether you downloaded the Windows 2003 32bit or the Windows 2003 64 bit installation software from Download Central).</i>
3	In the 2003...\ 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 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	<p>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.</p> <ul style="list-style-type: none"> Run the file called: wtInstallCheck.exe
2	<p>On the Horizon Business Insight Version Check and Install Paths window, click the button noted below, then click Continue to move on.</p> <p>Database server (applicable only to multi-server environments)</p>
3	<p>On the Horizon Business Insight Installation Version Checker window, you must provide the information described below.</p> <p>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.</p> <ul style="list-style-type: none"> 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. <p>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:</p>

Step	Task	
	Database Server Name	Enter the name of the HBI server where Microsoft SQL is installed.
	Web Sites Path	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. WFiles, WReports, WTemp, WLog directories are created in this location. Default is c:\HBI\
	JBoss Path	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	<p>When the HBI Installation Check window is displayed, click OK.</p> <p>Be sure to review and save the log file located at:</p> <p><i>x:\HBI\Wtlog\Install\HBI_Install_Check_[date]_[HH]_[MM].log</i></p>	

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	<p>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.</p> <ul style="list-style-type: none"> Run the executable: HBI_SQL.exe.
2	<p>At the Install HBI 15.0 Introduction window, click Next to continue the installation.</p>
3	<p>When the Pre-Installation Summary is displayed:</p> <ul style="list-style-type: none"> Verify the accuracy of the installation information. Click Install to continue. <p>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.</p>
4	<p>When prompted to load the HBI software, click Yes.</p> <p>When prompted to select the directory from which to load the packages, <u>you must select the default path shown below:</u></p> <p>C:\McKesson\HBI 15.0\Server\Packages</p> <p>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.</p>
5	<p>Click OK to continue.</p>
6	<p>Provide a Domain, Username and Password:</p> <ul style="list-style-type: none"> Enter the domain name for both the MTS_WTUSER and MTS_WTADMIN. <i>(If this is a local server, domain name is not applicable.)</i> Enter each Username in the appropriate section. Enter the password for each account. If it has changed recently, see your System Administrator. <p>The Com+ Package installation will proceed. When the installation has completed, you will see an HBI Installation Complete dialog box.</p> <ul style="list-style-type: none"> Click OK.

Step	Task
7	<p>You will be prompted to View Log or Exit.</p> <ul style="list-style-type: none">• 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. <p>The HBI software installation will continue to run.</p>
8	<p>Click Done when you are notified that the installation is complete.</p>

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 *

** In a multiserver environment, 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, multi-server customers must complete the steps below. Single-server customers can move on to the instructions for installing the IIS websites.

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.

Note to customers installing in a 64-bit environment: 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	<p>Browse to the location where the HBI 15.0 Installation Executable files were extracted. The default location is c:\McKesson\HBI 15.0.</p> <ul style="list-style-type: none"> Open the ...\Server\Web folder Run the file called: WebInstall_15_0.bat
2	<p>Navigate to the location noted below:</p> <p style="padding-left: 40px;">x:\HBI\WTlog\Install\</p> <p>Open the log files noted below and verify that the websites are correctly installed:</p> <p style="padding-left: 40px;">WebInstall_[hbiversion#]_[Date/Time].log</p> <p style="padding-left: 40px;">websvcinstallutil.log</p> <p>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.</p>

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.

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	<p>Go to Start/Settings/Control Panel/Administrative Tools/Internet Information Services (IIS) Manager.</p> <ul style="list-style-type: none">From the Internet Information Services (IIS) window, expand Internet Information Server/local machine/ Websites/Default web sites/ (where local machine is the machine name of the HBI server).Select and right-click on the HBI_Viewer (located under Default Website) and select Properties from the shortcut menu.
2	<p>From the HBI_Viewer Properties window:</p> <ul style="list-style-type: none">Select the Custom Errors tab.From the Custom Errors tab, select the entry for 404 and click Edit.
3	<p>On the Edit Custom Error Properties window, select the action to Execute a URL on this site.</p>
4	<p>In the URL text box:</p> <ul style="list-style-type: none">Type the following: /hbi_viewer/wterror_404.aspClick OK to close the window. <p>Do not close Internet Information Services (IIS) Manager.</p>

Move on to the next section.

Grant SMTP operator privilege - HBI server

In order for the e-mail notification options to work in Horizon Business Insight, Operator privilege on the default SMTP Virtual Server must be granted to the MTS_WTUSER account.

To do so, complete the following procedure:

Step	Task
1	Navigate to Start/Programs/Settings/Control Panel/Internet Information Services (IIS) Manager . <ul style="list-style-type: none">• Expand Local Machine.• 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: <ul style="list-style-type: none">• 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.

Move on to the next section.

Add login to Microsoft SQL server 2005

This section describes the procedure to add MTS_WTUSER as an SQL Server login.

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

Follow the steps below to add login to Microsoft SQL server.

Step	Task						
1	<p>Navigate to Start/Programs/ Microsoft SQL Server 2005/SQL Server Management Studio and connect to the server.</p> <ul style="list-style-type: none"> In the tree-view, expand Security. Right-click on Logins and select New Login. 						
2	<p>On the General tab of the Login- New window, enter or select the information shown below.</p> <p>To begin, click Search and select the Login Name shown below.</p> <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>	Login Name	(domain or local) MTS_WTUSER account	Authentication	Windows Authentication	Defaults - Database	WebTrend
Login Name	(domain or local) MTS_WTUSER account						
Authentication	Windows Authentication						
Defaults - Database	WebTrend						
3	Select the Server Roles tab and place a checkmark next to sysadmin .						
4	Select the User Mapping tab.						
5	<p>Select the checkbox next to the Webcache database and place a checkmark next to the following under Database role membership for Webcache:</p> <ul style="list-style-type: none"> public db_owner 						
6	<p>Select the checkbox next to the Webdata database and place a checkmark next to the following under Database role membership for Webdata:</p> <ul style="list-style-type: none"> public db_owner 						

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 : <ul style="list-style-type: none">• public• db_owner
8	Click OK and close the Microsoft SQL Server Management Studio.

Move on to the next section.

Establish user rights for WTUsers - HBI server

The user rights *Log on As a Batch Job* and *Allow Log on Locally* must be granted to the group WTUsers. You must also grant user rights *Access This Computer from the Network* to the MTS_WTUSER and MTS_WTADMIN domain accounts.

Log on as a batch job

Step	Task
1	From the Windows menu, select Start/Programs/Administrative Tools/Local Security Policy .
2	Select Local Policies/User Rights Assignments/ Log on as a batch job . <ul style="list-style-type: none">• Right-click and select Properties.• On the properties window, click Add User or Group.
3	On the Select Users or Groups window: <ul style="list-style-type: none">• Click 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. <ul style="list-style-type: none">• Click OK to return to the previous window.
5	On the Select Users or Groups window: <ul style="list-style-type: none">• 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.

Access this computer from the network

Step	Task
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 . <ul style="list-style-type: none">• Right-click and select Properties.• On the properties window, click Add User or Group.
3	On the Select Users or Groups window: <ul style="list-style-type: none">• Click Locations and select your domain server.• Click OK.
4	On the Select Users and Groups window: <ul style="list-style-type: none">• 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: <ul style="list-style-type: none">• 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.

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 both manual and automated 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	<p>Open the ..\Server\Server Executables\ folder and locate the file below:</p> <p>service_MCKHBIPortlets.bat</p> <ul style="list-style-type: none"> • Double-click on the file to run it. • At the command window, Press Enter to continue. <p>A log file named, <i>Services_mckhbiportlets.txt</i> is created in the Wtlog\Install directory.</p>
3	<p>Repeat the step above to run the file noted below:</p> <p>service_MCKHBIServlets.bat</p> <p>A log file named, <i>Services_mckhbiservlets.txt</i> is created in the Wtlog\Install directory.</p>

Step	Task
4	<p>Navigate to the new log files at the location below and verify that each of the services have been properly installed.</p> <p>x:\HBI\wtLog\Install\</p> <p>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.</p>

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

No log file is created for this procedure.

Move on to the section entitled, [Start JBoss services](#).

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 Control Panel on the HBI server and verify that the following services are present: <ul style="list-style-type: none">• McKesson HBI Portal Server• McKesson HBI Servlets
3	On the Services window: <ul style="list-style-type: none">• 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.

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) in order for Horizon Business Insight to run properly.

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_[servername]	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.				

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	
IUSR_[servername]	local		Modify	
IIS_WPG	local		Modify	
MTS_WTUSER	domain or local		Modify	
SYSTEM	local		Full Control	

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_[servername] Internet Guest Account	local		Modify	
MTS_WTUSER	domain		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.

Security Permissions for Resource - HBI Application Server (x:\inetpub\wwwroot\webtrend)				
Administrators	local		Full Control	
IIS_WPG	local		Full Control	
IUSR_[servername] Internet Guest Account	local		Read	
MTS_WTUSER	domain		Modify	
SYSTEM	local		Full Control	
WTUsers	local		Read	

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_WPG	local		Modify	
MTS_WTUSER	domain or local		Modify	
SYSTEM	local		Full Control	
WTUsers	local		Read	
IUSR_[servername]	local		Modify	

Security Permissions on the HBI folder - Multi-server only on the SQL Server (x:\HBI)				
Administrators	local		Full Control	
IIS_WPG	local		Modify	
MTS_WTUSER	domain or local		Modify	
SYSTEM	local		Full Control	
IUSR_[servername]	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	

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	

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	<p>Right-click on the <i>[HBIdirectory]</i> folder and choose Properties from the shortcut menu.</p> <ul style="list-style-type: none"> • Select the Security tab and click Advanced. • Remove the checkmark in the box to Allow inheritable permissions from parent to propagate to this object... • Click Remove. • Click OK to return to the Properties window. • Click Yes on the security message.
3	<p>On the Properties window, click Add to begin adding the user accounts listed in the table.</p> <ul style="list-style-type: none"> • 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	<p>Important: Perform this step only when setting permissions for the <u>ExcelExport</u> and <u>UserImages</u> folders. Otherwise, skip this step and move on to Step 6.</p> <p>-----</p> <p>To set permissions for the WTUsers account from the Properties window, click Advanced.</p> <ul style="list-style-type: none"> Click Add, then click Advanced. Click Find Now to populate the Search results area, then select WTUsers from the results. Click OK, then OK again. Select This folder and subfolders from drop down. Select Create Files/Write data and click Apply these permissions to objects and/or containers within this container only. Click OK. Click Add, then Advanced and repeat the bulleted items in this step to add a second instance of the WTUsers account. Click OK, then OK again. Select This folder, subfolders and files from drop down. Select the following permissions: <ul style="list-style-type: none"> 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 OK, then OK.

Step	Task
6	<p>Click Advanced.</p> <ul style="list-style-type: none">Place a checkmark in the box to select the option to Replace permission entries on all child objects with entries shown here that apply to child objects.Click OK.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	<p>From the Properties window, click the Sharing tab.</p> <ul style="list-style-type: none">From the Sharing tab, select Share This Folder.For the Share Name, enter the name of the subfolder as shown in the table.Click Permissions.From the Permissions window, select <u>Everyone</u>, and then click Remove.

Step	Task
4	<p>Click Add to begin adding the user accounts listed in the table shown above.</p> <ul style="list-style-type: none">• 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.• Click Advanced.• Click Find Now.• From the Search results, select one of the user accounts shown in the table.• Click OK.• Click OK again.• Select the proper permissions based on the information in the table for the user you selected.• Click OK.• Click OK again.
5	Repeat step 4 for the remaining user accounts listed in the table.
6	Click OK .

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	<p>When prompted with a message indicating that a Bad Product key has been encountered. Click OK.</p> <p>The multi-tabbed Horizon Business Insight Server Configuration window will be displayed. By default, the Security tab is displayed.</p> <p>Continue with the steps below to set the product key.</p>

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.

Set Report Settings for multi-server installations only

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

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.

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 Advanced tab: <ul style="list-style-type: none">For the Language for non-Unicode programs, verify that the following is selected: <i>English (United Kingdom)</i>.In the Default User Account Settings, verify that the following option is selected: Apply all settings to the current user account and to the default user profile.Click OK.
4	Click Apply .
5	Move on to the next page to verify the installation of your Horizon Business Insight software and components.

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	<p>Run the options listed below from the Horizon Business Insight Support Page.</p> <ul style="list-style-type: none"> • Component Instantiation Test • Show Server License Information • Email Test • SQL Information and Check • Show Install Paths <p>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:</p> <p><code>http://[yourservername]/wtadmin/include/support.asp</code></p> <p>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.</p> <p>Refer to the chapter about the HBI Support Page in the document entitled <i>Optional Configuration Guidelines for Horizon Business Insight</i>.</p>
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	<p>Log into the HBI Viewer website and click on Dashboard located at the top of the page. The Public Dashboard Welcome portlet is displayed.</p> <p>Note: You may experience a delay of about thirty seconds when attempting to open the Dashboard for the first time from your workstation.</p>
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: <ul style="list-style-type: none">• Customer/Hospital Name• Customer/Enterprise ID (<i>optional</i>)
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.

Other configuration topics 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 HorizonWP 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