

# Upgrade to Webtrends Analytics 8.7: Best Practices

Version 3

**Webtrends Analytics is a powerful application that must be installed on a dedicated computer. This document is a guide that describes some of the basic system requirements and commonly encountered install issues when upgrading to version 8.7.**

## Critical notices

Due to the functional nature of the 8.7 installer; it is critical to create a current and full backup of the Webtrends installation before running the installer for any reason. If a current and full backup is not secured prior to running the Webtrends installer executable or MSI file, there is a potential risk of losing all existing data and configurations if the installer fails or is cancelled.

If you downloaded the Webtrends 8.7 installer prior to August 14, 2009 please delete all installer packages and files, and download the latest 8.7 installer package. The latest installer package can be found on the ftp site, <ftp://ftp.webtrends.com/wrc/87d/wt-windows.exe>.

Because of named instance support in 8.7, it is even more critical than ever to ensure that your Webtrends service accounts are setup with the appropriate permissions. Named Pipes and TCP/IP protocols should be enabled for your SQL Server Enterprise installation.

Additionally, Windows XP is no longer a supported Operating System for Webtrends Marketing Lab. If your install is currently on Windows XP, please consult with your Account Manager for a professional service engagement to migrate your installation.

For ease of upgrade, it's recommended that you stop ALL Webtrends services except the MS-SQL Server just prior to upgrade.

## Pre-Upgrade Tasks:

There are several tasks that are critical to a successful upgrade. Skipping these tasks may result in complete loss of data if the upgrade fails. If there are any questions regarding these steps, please do not hesitate to contact Webtrends Technical Support.

### Make a complete backup of the Webtrends install

1. Stop all running jobs
2. Stop all Webtrends services
3. Backup the following directories in their entirety
  - \webtrends\storage
  - \common\database\SQLExpress\MSSQL.1\MSSQL\DATA\*

\*The above path refers to a default installation of Webtrends\*

### Download all required install packages

If your current install includes the GeoTrends component, it is necessary to first download the GeoTrends data file. This file is approximately 810MB in size.

Any GeoTrends data file prior to 8.5 is not valid for the 8.7 version as we have changed the storage format. This resulted in a larger file, but with more accurate and complete data. Additionally, this newer data file will not work with previous versions of Webtrends software.

Marketing Lab Analytics

8.0d – <ftp://ftp.webtrends.com/wrc/80d/wt-windows.exe>

8.5a – <ftp://ftp.webtrends.com/wrc/85a/wt-windows.exe>

8.7d – <ftp://ftp.webtrends.com/wrc/87d/wt-windows.exe>

GeoTrends Data File

<ftp://ftp.webtrends.com/geotrends/datafile/geotrends.8.200808.dat>

Earlier Versions –

<ftp://ftp.webtrends.com/geotrends/datafile/geotrends.8.200611.dat>

### Check system specifications

Verify that the server meets the minimum recommended system specifications for the install type. These are listed at the end of this document in the section “General System Specifications”, as well as the Installation and Configuration Guide. If the system does not meet the minimum required specifications, the upgrade will detect this, and fail. If the upgrade fails in this manner, the only way to recover is to restore a backup, and then correct the invalid hardware or software configuration before continuing the upgrade process.

## Common install issues and recommended practices

This section details some of the commonly encountered mistakes made while trying to install Webtrends, as well as outlines situations that may cause the installer to fail.

### Services shutdown order

This is the preferred order to stop the Webtrends' services; startup is the reverse of this list. Your install may not have all of the services listed below.

Webtrends – Scheduler Agent

Webtrends – Email Notification Service

Webtrends – DataExtraction Retention Service

Webtrends – UI Web Services

Webtrends – System Monitor

Webtrends – User Interface *(this controls the Tomcat service)*

SQL Server (MSSQLSERVER)

### Do not install Webtrends on an existing web server

Webtrends uses a vast amount of system resources, and runs its user interface on IIS. Installing Webtrends on an existing web server will result in degrade performance for both applications.

### SDC requires a dedicated computer and a dedicated IIS instance

The SDC installs an ISAPI filter into IIS. This filter is designed to cause IIS to log only certain gif requests and discard all other requests. Installing the SDC on an existing web server may cause other sites hosted by that server to behave erratically.

### Do not install SDC on the Webtrends computer

Webtrends is an extremely resource intensive application. In some cases, this is enough to cause SDC installed on a Webtrends server to miss data that is sent to it. These missed hits are never logged and will affect the accuracy of the reports.

### Install Webtrends as the System Administrator

Webtrends needs to be able to not only read and write files to the hard drives, but the install itself must be able to edit the registry and connect with other components on both the install server, and other Webtrends components on the network. To avoid possible permissions or security policy issues, run the install as a System Administrator.

### Backing up Webtrends

In order to properly backup the WebTrends directories all Webtrends services must be shut down prior to backing up the Webtrends folder and files.

### Install IIS prior to installing Webtrends

Webtrends runs a user interface on IIS. IIS must be installed prior to installing Webtrends, or the install will fail. It is also recommended to disable the default web site before installing Webtrends. You must have .NET Framework 3.5 or better installed.

## **Exclude the Webtrends folders from antivirus real time scanning**

Virus scanning software, more specifically; live virus scanning can contribute to corruption of the Webtrends installation. A live virus scanner detects when a new file is saved to the system, or a file is changed/rewritten. When it detects this activity, it immediately attempts to scan the file before a virus has the chance to do any damage. Often times, the virus scanner needs to put a read/write lock on the file during the scanning process. As Webtrends does a large number of reads and writes during the analysis process, a live virus scanner attempting to scan the files being worked with can easily cause a read or write failure. This will result in incorrect data within the file, and consequently corrupt the integrity of the application and database. This same activity can affect the MS-SQL database tables as they are changed, or any other configuration file that is modified by Webtrends.

As a best practice Webtrends recommends excluding the entire Webtrends directories from being scanned to prevent Anti-Virus software from causing corruption. In some high security environments this is not always possible. In such cases, to prevent corruption and still meet the need to have the Webtrends directory actively scanned; Webtrends can provide a list of file types to be excluded from active scanning inside the Webtrends folders. Contact technical support for a full list of file types to exclude.

## **Set permissions for service account**

The Scheduler Agent service must run as a domain user if log files are located on another server across a domain, if the install is a distributed architecture environment, or if the MSSQL dedicated instance is located on another server in the domain.

Create a service account (a domain account for the services to log on as). Make sure to set the password to "Never Expire". Add the domain account used for the Webtrends services to the following security policies of both the Webtrends server, and the server hosting the log files:

- Log on locally (Allow logon locally in Windows 2003 systems)
- Log on as a service
- Act as part of the operating system (this option is not given to any account by default) and is no longer required by Webtrends as of v8.x.

This user must be a member of the Administrators group on all computers running a Webtrends service for the services to properly interact with the operating system. This is required even if the account is a domain administrator account. The Report Cache Server component relies on the local administrators group and the service will fail to start if the domain user is not a member of that group.

Make sure that the all Webtrends services are all using the domain account to run.

If Webtrends is setup in a distributed architecture, be sure to do this on each one of the servers that has the scheduler agent installed.

### Setting up a share for the storage locations

The storage locations folders must be shared (i.e. C:\Program Files\Webtrends\Storage) when installing a distributed architecture, or if the dedicated MS SQL instance is located on another server. A UNC share must be configured with the appropriate permissions and security settings.

NOTE: Admin shares (such as \\server\D\$\folder\ ) are not supported by Webtrends, and can result in analysis failure or data loss.

Create the share and set both Sharing and Security permissions for this share (be sure to add the service account if one was created one for the Webtrends services).

Edit the Sharing and Security permissions for the UNC share folder.

### The following environments and configurations are not supported for production installations of Webtrends Analytics 8.7d

- Any environment that does not meet ALL of the minimum system requirements as specified in the release notes
- Windows 2003 Server Web Edition
- Any Linux, Unix, or Solaris based operating system
- On any operating system already running another copy of Apache, IIS, or any other web server
- On any operating system already running another copy of MySQL, MS SQL, or another database or database driven application
- Installations that make use of an Admin shares (such as C\$ or D\$) or Samba shares for any aspect of the installation including log file retrieval
- Any versions or updates of Apache, MySQL, or Tomcat that do not ship with Webtrends or installations of these components on Linux, Unix, or Solaris.
- Any third party customization of Webtrends or the configuration files unless otherwise directed by Webtrends
- Any network with overly restrictive firewall or proxy configurations. Certain ports need to be available to allow communication between the various Webtrends components. Some applications can prevent full product functionality. For example, DNS resolution does not function through a default configuration of Microsoft ISA server.
- Installing the main application to a NAS or SAN environment. Moving logs or configuring storage folders to reside on a SAN is supported; however, the main application is not supported in a SAN environment.

### The following environments and configurations are not supported for production installations of the Smart Source Data Collector (SDC)

- Any environment that does not meet ALL of the minimum system requirements as specified in the release notes
- Any virtual server environment including Microsoft Virtual Server, VMWare, and Wine
- Windows server 2003 Web Edition
- On any web server that is not dedicated to the SDC (for example, an IIS installation that serves other web sites as well)

(SDC environments/configurations continued)

- Any third party customization of the configuration files or JavaScript tag unless otherwise directed by WebTrends
- Multiple instances of the SDC running on the same computer, either with multiple NIC's and IP's or with a single NIC and IP address.
- Installations that make use of an Admin shares (such as C\$ or D\$) or Samba shares for any aspect of the installation (including log file storage)

### General System requirements (all install types)

**For complete system requirements and additional documentation, please see our Documentation Center - <http://product.webtrends.com/WRC/8.7d/documentationcenter/>**

- Webtrends supports IDE, SATA, SCSI drives and NAS/SAN storage systems (NAS/SAN is supported for log files and storage locations only, not for installing the main application). External USB and Firewire storage is not supported.
- Webtrends requires a minimum screen resolution of 1024 x 768 with 16-bit color.
- Microsoft Internet Information Services v6 or higher (except stand alone Analysis Engine)
- Microsoft .NET Framework 2.0 or higher
- Converting Webtrends Analytics reports to Microsoft Word or use Webtrends SmartReports for Microsoft Excel, WebTrends also requires Office XP, Office 2003, or Office 2007.
- Supported Operating Systems
  - o Windows 2003 Server with SP1 or higher
  - o Windows 2003 Server R2
  - o Windows 2003 Server x64 with SP1 or higher
  - o Windows 2003 Server x64 R2
- Supported Browsers
  - o Microsoft Internet Explorer v6.0 or v7.0
  - o Mozilla Firefox v1.5 or higher
- Supported System Databases
  - o SQL Server 2005 Enterprise with Service Pack 2 or better (supported on Windows 2003 Server)
  - o SQL Server 2008 Enterprise (supported on Windows 2008 Server)
  - o MS SQL Express 2008 (comes free with the installer)

To run GeoTrends on the same computer WebTrends Analytics, add 1 GB of RAM to the recommended minimum. To run GeoTrends on the same computer running WebTrends Analytics and process more than 100,000 page views a day, add 2 GB of RAM to the recommended minimum. This memory is used to load the look up table when the GeoTrends service starts. As such, it is in use the entire time that the GeoTrends service is running, not just during an analysis.

## Webtrends Analytics Requirements

Webtrends Analytics is a powerful application that you must install on a dedicated computer. This section describes the minimum requirements for installing Webtrends Analytics software on a single computer.

### Minimum Hardware Requirements

- 2.4 GHz or higher (4 cores)
- 4 GB of RAM\*
- 80 GB of usable hard disk space (7200 RPM IDE)
- 100 Mbps network interface card
- Advanced reporting features require additional hardware.

\*In order to run multiple simultaneous analyses on the same computer, WebTrends Analytics requires at least 3 GB (4 GB of RAM if GeoTrends is installed) of RAM and the /3GB switch in the BOOT.INI file. This does not apply to x64 operating systems. Requirements are based on 5 profiles, 2 concurrent users, and up to 1,000,000 daily page views.

## Webtrends UI Server Requirements

This section describes the minimum requirements for installing the Webtrends UI Server component on a dedicated computer.

### Minimum Hardware Requirements

- 2.4 GHz or higher
- 2 GB of RAM
- 80 GB of usable hard disk space (7200 RPM IDE)
- 100 Mbps network interface card

## Webtrends Analysis Engine Requirements

This section describes the minimum requirements for installing the Webtrends Analysis Engine as a stand-alone component on a dedicated computer. The Analysis Engine component includes the Standard Analysis Engine and the Express Analysis Engine.

### Minimum Hardware Requirements

- 2.4 GHz or higher
- 2 GB of RAM\*
- 80 GB of usable hard disk space (7200 RPM IDE)
- 100 Mbps network interface card

\*In order to run multiple simultaneous analyses on the same computer, Webtrends Analytics requires at least 3 GB of RAM and the /3GB switch in the BOOT.INI file. This does not apply to x64 operating systems. Requirements are based on 5 profiles, 2 concurrent users, and up to 1,000,000 daily page views.