

IBM Unica NetInsight
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Installation Guide



Note

Before using this information and the product it supports, read the information in "Notices" on page 27.

This edition applies to version 8, release 6, modification 0 of IBM Unica NetInsight and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Contacting IBM Unica technical support

If you encounter a problem that you cannot resolve by consulting the documentation, your company's designated support contact can log a call with IBM® Unica® technical support. Use the information in this section to ensure that your problem is resolved efficiently and successfully.

If you are not a designated support contact at your company, contact your IBM Unica administrator for information.

Information to gather

Before you contact IBM Unica technical support, gather the following information:

- A brief description of the nature of your issue.
- Detailed error messages you see when the issue occurs.
- Detailed steps to reproduce the issue.
- Related log files, session files, configuration files, and data files.
- Information about your product and system environment, which you can obtain as described in "System information."

System information

When you call IBM Unica technical support, you might be asked to provide information about your environment.

If your problem does not prevent you from logging in, much of this information is available on the About page, which provides information about your installed IBM Unica applications.

You can access the About page by selecting **Help > About**. If the About page is not accessible, you can obtain the version number of any IBM Unica application by viewing the `version.txt` file located under the installation directory for each application. If the `version.txt` file is not available, use the command `NetTracker admin -buildinfo` to obtain the version information.

Contact information for IBM Unica technical support

For ways to contact IBM Unica technical support, see the IBM Unica Product Technical Support website: (<http://www.unica.com/about/product-technical-support.htm>).

Chapter 2. Before installing NetInsight

NetInsight is designed to run on a Web server and be accessed via a Web browser. Therefore, users do not need to install any software on their client machines to use the application.

Before installing NetInsight:

- Ensure that the computer on which you install NetInsight meets the minimum system requirements. For details, see *IBM Unica NetInsight Recommended Software Environments and Minimum System Requirements*.
- **Important: If you are installing on Windows or 64-bit Linux and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported.**
- If you want NetInsight to run on IIS, you must configure some options within IIS before beginning the installation.
- If you are installing for UNIX or Linux and you intend to connect to ODBC data sources, you must install and configure unixODBC.
 - When the installation prompts for the database driver, use the driver name you used when configuring the unixODBC `odbcinst.ini` file.
 - For Apache web servers, use `SetEnv` to add the path to unixODBC to the `LD_LIBRARY_PATH` variable in the Apache configuration file (`httpd.conf`). For example:

```
SetEnv LD_LIBRARY_PATH /usr/local/lib
```
- Please contact IBM Unica Technical Support before upgrading if your current installation uses any of the following:
 - A partitioned schema
 - A non-standard schema
 - Data model extensions.

Where to install IBM Unica NetInsight

Follow the guidelines below when installing NetInsight.

Installation location

A Web server must be installed and running on the server on which you install NetInsight. This can be, but does not have to be, the Web server for the site you are analyzing. Regardless of where you install NetInsight, ensure that it has access to your site's Web server log files either through a local network or an FTP connection.

NetInsight directories

Where you install NetInsight files is subject to your Web server configuration. These guidelines describe where to install files relative to other files on your server.

NetInsight uses three different directories:

- **NetInsight HTML directory:** Put this directory in its own subdirectory under your Web server's HTML document root. This is where NetInsight stores the reports it generates.

- **NetInsight CGI-BIN directory:** Put this directory in its own subdirectory under your Web server's CGI-BIN document root. On Windows running IIS this will typically be under the Scripts directory.
- **NetInsight program directory:** Put this directory in any location. On Windows, the default is C:\Program Files\NetInsight; on UNIX, the default is /usr/local/NetInsight.
This directory contains the binary and configuration files.

About character sets

Character sets map written characters to a number that can be stored electronically. Some character sets only contain characters for certain languages. For example, the character set Western European (ISO-8859-1) contains the characters in the Latin script and can represent most European languages, but not Arabic or Mandarin. The Unicode character set contains the characters needed to represent almost all written languages. NetInsight uses UTF-8, a common implementation of Unicode.

About character sets in NetInsight

Several character sets affect NetInsight:

- The character set of the data (log file or page tag) you are analyzing.
- The character set specified in your external database application.
- The character set specified for the profile, which is used for the reports and the profile interface, and is also the character set used to send data to the database.
- The character set specified in the administration options, which is used for the Profile Manager and the administrative options.

The character sets of your profiles must match the database's character set. If they do not, you may end up with junk characters in your database. In most database applications, the character set is specified at the application level, so for the profile character set and the database character set to match, all of your profiles must use the same character set.

Likewise, if the profile's character set is different than the Profile Manager character set, the profile title may not display properly in the Profile Manager. As a best practice, ensure that all of your settings use the same character set.

Support for UTF-8

NetInsight supports UTF-8 for DB2[®], Netezza[®], and Oracle databases. UTF-8 is not supported for SQL Server.

Note: If you are planning on using UTF-8, contact IBM Unica technical support for additional guidance.

When to change character sets

NetInsight creates the database tables for a profile the first time it is updated. The database tables are created using the character set specified in the Locale options. Do not change the character set for a profile whose database has already been created. If you need to change the character set for an existing profile, contact IBM Unica technical support.

Which character set to use

If you anticipate needing to analyze keywords or page titles in a variety of languages, the best practice is to use UTF-8 if it is available for your database. Otherwise, use the character set that is the best match for the data you are analyzing.

Note: NetInsight environments with Netezza databases must use UTF-8 for the profile character set.

Using the UTF-8 character set in DB2

If you are using a DB2 database and you want to use the UTF-8 character set, you must set the value of the environment variable named **DB2CODEPAGE** to 1208 in the `Nettracker.cfg` file before you import data into any of your profiles. For example:

```
<envvars>
  <envvar name="DB2CODEPAGE">1208</envvar>
</envvars>
```

Using the UTF-8 character set in Oracle

If you are using an Oracle database and you want to use the UTF-8 character set, you must set the value of the environment variable named **NLS_LANG** to `AMERICAN_AMERICA.AL32UTF8` in the `Nettracker.cfg` file before you import data into any of your profiles. For example:

```
<envvars>
  <envvar name="NLS_LANG">
    AMERICAN_AMERICA.AL32UTF8
  </envvar>
</envvars>
```

Note: This setting assumes that you are using AL32UTF8 (the Oracle UTF-8 character set supported by NetInsight) as the database and client character set.

Locale settings for UTF-8 with Netezza

To display UTF-8 characters correctly through the NetInsight interface with Netezza, the `LC_CTYPE` environment variable in the `Nettracker.cfg` file must be set to the correct UTF-8 locale type for your environment. By default, the `LC_CTYPE` variable is set to `en_US.utf8`. If you have a different locale, change the value of `LC_CTYPE` to the correct UTF-8 locale type for your environment.

Important: If you need to change this setting, change it before you import profile data. If you import data and then change the `LC_CTYPE` variable, the database will contain incorrect profile data.

Case-sensitivity requirement for NetInsight databases

NetInsight requires a case-sensitive database. If your database is not case-sensitive, the NetInsight installation will not complete.

Important: Other products in the IBM Unica Marketing do not support case-sensitive databases. The databases for those products must be separate from the NetInsight database.

Before installing IBM Unica NetInsight for DB2

Your database server must be running a supported version of DB2. For a complete list of supported database versions, refer to the *Recommended Software Environments and Minimum System Requirements* for your version of NetInsight posted on the IBM Unica Customer Central web site (<https://customers.unica.com>).

You must know the user name, password, and database alias necessary to log onto your DB2 database server from your computer in order to complete the installation. If your computer is not currently configured as a DB2 client, consult the DB2 documentation for instructions.

Database code page

Your database should use a single-byte, case-sensitive, and accent-sensitive code page. You can use a UTF-8, IBM-1252 (on Windows systems) or ISO8859-1 (on UNIX systems) code page. If you are considering using a different code page, you should first contact IBM Unica technical support.

Note: If you are planning on using UTF-8, you are encouraged to contact IBM Unica technical support for additional guidance.

Before installing IBM Unica NetInsight for Netezza

Your database server must be running a supported version of Netezza. For a complete list of supported database versions, refer to the *Supported Software Environments and Minimum System Requirements* for NetInsight posted on the IBM Unica Customer Central web site (<https://customers.unica.com>).

You must know the user name and password to log into your Netezza database server from your computer to install NetInsight.

Database and client character sets

The UTF-8 character set is required for installing NetInsight for Netezza.

Before installing IBM Unica NetInsight for Oracle

Important: If you are installing on Windows or 64-bit Linux and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported.

To install NetInsight, you need a valid user account for your Oracle database. This user account must have previously been granted the CONNECT role, and must have sufficient space available in the quota for the default tablespace. The amount of space available must be large enough to accommodate the total size of the logs you expect to process with NetInsight.

Your database server must be running a supported version of Oracle. For a complete list of supported database versions, refer to the *Recommended Software Environments and Minimum System Requirements* for your version of NetInsight.

You must know the user name, password, and service name necessary to log into your Oracle database server from your computer to install NetInsight.

If your computer is not currently configured as an Oracle client, consult the Oracle documentation for instructions.

Database and client character sets

The database and client character sets you use when creating your Oracle database can have a significant impact on NetInsight. The **WE8ISO8859P1** and **AL32UTF8** character sets are safe to use as both the database and the client character sets.

If you are considering using AL32UTF8 or a different character set, you should first contact IBM Unica technical support. If you do not know which character set you are using, contact your database administrator.

Note: The **US7ASCII** character set should never be used.

Oracle 10gR2 configuration

Important: Oracle 10gR2 is only supported for 32-bit Linux installations. If you are installing on Windows or 64-bit Linux and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported.

With Oracle 10gR2, the **CONNECT** role alone is not sufficient for the NetInsight user to connect to the database. To enable successful database connections, you must grant the NetInsight user the following additional permissions:

- **CREATE SESSION**

This permission is needed to create a session. Oracle throws an ORA-01045 error when someone tries to connect to a database if this privilege is missing.

- **ALTER SESSION**

This permission is needed to alter your current session in one of the following ways:

- To enable or disable the SQL trace facility
- To change the values of NLS parameters
- To change your DBMS session label in Trusted Oracle
- To change the default label format for your session
- To close a database link
- To send advice to remote databases for forcing an in-doubt distributed transaction
- To permit or prohibit procedures and stored functions from issuing COMMIT and ROLLBACK statements
- To change the goal of the cost-based optimization approach
- In a parallel server, to indicate that the session must access database files as if the session were connected to another instance

- **CREATE TABLE**

This permission is needed to create a table, the basic structure to hold user data, specifying the following information:

- Column definitions
- Integrity constraints
- The table's tablespace
- Storage characteristics
- An optional cluster
- Data from an arbitrary query

Permissions required for Oracle users

All Oracle users require the following permissions in order for NetInsight to terminate database sessions associated with running reports that are canceled by a user or admin:

- ALTER SYSTEM
- SELECT on gv_\$session

If you are unable to grant these permissions to all users, check the reportschedule_qexec log file regularly. NetInsight logs error messages listing database sessions that were not terminated, so you can identify the sessions you must manually terminate.

Before installing IBM Unica NetInsight for SQL Server

To install NetInsight, you must have a valid user account for your SQL Server database. This user account must be granted the db_owner role on the database that you intend to use for NetInsight. The amount of space available must be large enough to accommodate the total size of the logs you expect to process with NetInsight.

Your database server must be running a supported version of SQL Server. For a complete list of supported database versions, refer to the *Recommended Software Environments and Minimum System Requirements* for your version of NetInsight on the IBM Unica Customer Central web site (<https://customers.unica.com>).

If your computer is not currently configured as a SQL Server client, consult the SQL Server documentation for instructions.

SQL Server ODBC drivers

Your computer must have version 3.7 or later of the SQL Server ODBC driver installed. Acceptable versions of the SQL Server ODBC driver are included in the SQL Server distribution and are installed when SQL Server is installed. You can also find acceptable SQL Server ODBC drivers in the Microsoft Data Access Components package version 2.1 or later. If your computer does not currently have the correct SQL Server ODBC driver installed, consult the SQL Server documentation or the Microsoft data access Web site for instructions.

SQL Server case-sensitivity considerations

A default SQL Server installation treats character strings in a case-insensitive and accent-insensitive manner due to the default sort order setting. However, the NetInsight database must be both case-sensitive and accent-sensitive. (The installation does not complete with a case-insensitive database.) As a best practice, use a database with the Latin1_General_BIN collation order for Latin1 languages. Consult your SQL Server documentation for information and instructions on creating a case-sensitive database.

Chapter 3. Installing NetInsight

This chapter contains information on installing NetInsight on supported platforms.

To install IBM Unica NetInsight on UNIX

Before proceeding with these instructions, please review the prerequisites to installation described earlier in the guide.

Important: When installing on Linux 64-bit and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported.

1. Obtain the IBM Unica NetInsight DVD, or download the software from IBM.
2. Unpack the installer archive into a temporary directory. For example:

```
gunzip NetInsight -<version>-<database>-UNIX OS.tar.gz
tar xvf NetInsight-<version>-<database>-UNIX OS.tar
```
3. Change directories to the temporary directory.
4. Run the install program with the command `./ntinstall`.
5. Read and accept the license agreement.
6. Enter the following requested information when prompted.
 - For DB2, the instance name for the DB2 client and the user name, password, and database alias for the DB2 database.
For Oracle, the path to your Oracle client program directory (**ORACLE_HOME**) and the user name, password, and service name for the Oracle database.

Note: NetInsight tries to connect to the database. If it encounters difficulties, it displays an error message.

- The program directory to store executables.
 - The HTML directory in which to store HTML. This directory must be under the document root for your Web server reports.
 - The URL that corresponds to the HTML directory you specified.
 - The CGI-BIN directory. This directory must be set up as a CGI-BIN directory within your Web server software.
 - The URL that corresponds to the CGI-BIN directory you specified.
7. Indicate whether you want to configure the first profile during the installation process. If you enter Yes:
 - a. Enter the profile title.
 - b. Enter the web site URL for this profile.
 - c. Enter the path to the log file(s).
 8. Specify whether you want to enter information about your email server during the installation process. This allows users to email reports and send application error notifications to NetInsight administrators. If you do not configure mail server settings during installation you can do it later through the administration interface.

If you enter Yes, enter:

 - a. The host name or IP address of your mail server.

- b. The TCP port on which your mail server is installed, or press Enter to accept the default of 25.
 - c. The email address from which all reports will be sent.
 - d. The email address(es) of the individuals who should be notified of errors. Separate multiple email addresses with commas.
9. Indicate whether you want to have profiles updated automatically each day. If you select a time of day from the list, the installation program generates an entry for you to add to your system's crontab file.

After your review the values you entered and correct any mistakes, NetInsight finishes the installation and displays a URL for you to enter into your Web browser to begin.

Note: For Linux environments: The user running Apache requires write permission to the <NetInsight>/data/admin/logging directory. After installation, check the permissions on the logging directory. If they are owned by a user other than the Apache user, you may need to change their access permissions to allow write access to the Apache user if you have umasks set.

To install NetInsight on Windows

Before proceeding with these instructions, please review the prerequisites to installation described earlier in the guide.

Important: When installing on Windows and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported.

1. Obtain the NetInsight DVD, or download the software from IBM.
2. Log in to the server console with administrative access rights.
3. Double-click the self-extracting archive.
4. Follow the on-screen instructions.

Note: If you are using an Oracle database and installed the Oracle client immediately before installing NetInsight, you must reboot the server before you can use NetInsight.

To register IBM Unica NetInsight with the IBM Unica Marketing Platform

In order to use NetInsight with other IBM Unica Marketing products, you must register it with the IBM Unica Marketing Platform. Registration allows users to use a single sign on for all IBM Unica Marketing products and creates links in the IBM Unica Marketing interface to NetInsight.

Before you begin the registration process, complete the following tasks:

- Install both the IBM Unica Marketing Platform and NetInsight.
- Stop the Web application server that is serving the IBM Unica Marketing Platform.

To complete the registration process:

1. In a text editor, open `netinsight_config.xml`, located at the top level of the NetInsight installation directory.
2. Set the value of the **serverURL** property to the URL for NetInsight and save your changes to the file.

For example:

```
<property name="serverURL" type="string_property" width="40">  
  <value>http://my_netinsight_server/netinsight_root</value>  
</property>
```

By default, the URL is the computer name or IP address and installation root directory. You can copy the URL from the `NetTracker.cfg` file, under **<platform>/<htmlurl>**.

3. Run the IBM Unica Marketing Platform `configTool` as follows:

```
configTool -r NetInsight -f <NETINSIGHT_HOME>/netinsight_config.xml
```

This enables single sign on between NetInsight and the Marketing Platform.

Note: If you make a mistake or the NetInsight URL changes, you can change the value through the IBM Unica Marketing Platform.

4. Run `configTool` a second time, this time as follows:

```
configTool -i -p "Affinium|suite|uiNavigation|mainMenu|Analytics" -f  
<NETINSIGHT_HOME>/netinsight_navigation.xml
```

This enables the NetInsight menu item within the IBM Unica Marketing Platform.

Note: For more information on using the `configTool` utility, see the IBM Unica Marketing Platform documentation.

Important: To be able to view the NetInsight menu item within the Marketing Platform, individual users must be assigned the NetInsight User Role in the IBM Unica Marketing Platform. Without that assignment the menu item will not be visible.

Chapter 4. About upgrading to NetInsight 8.6.0

You can upgrade to NetInsight 8.6.0 from version 8.3.x and 8.5.x on UNIX and Windows systems.

For earlier versions, you must first upgrade to NetInsight 8.3.x or 8.5.x before upgrading to 8.6.0

Important: If you are upgrading on Windows or 64-bit Linux and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported. If you have an earlier Oracle client version (10g) in the path of an environment variable, you must update the environment variable to point to Oracle 11g before upgrading. For information about setting environment variables, see the *IBM Unica NetInsight Administrator's Guide*.

Note:

Please note the following before you begin the upgrade process:

- Ensure that the computer on which you are installing NetInsight meets the NetInsight 8.6 system requirements. For details, see *IBM Unica NetInsight 8.6 Recommended Software Environments and Minimum System Requirements*.
- NetInsight 8.6.x includes geographical data functionality; no separate geographical data conduit is required. If you are using the NetInsight Geographical Data Conduit with your current release of NetInsight, you must upgrade to the 8.6 version of the geographical database if you want to continue to access geographical reports. If you do not upgrade to the new geographical database, import of existing geographical data will fail. Download the latest version of the NetInsight Geographic Database from the download site URL you received from your IBM customer representative and save it to a location that is accessible to your NetInsight installation. For details about configuring NetInsight to use the new geographical database, see the *IBM Unica NetInsight Administrator's Guide*.

To upgrade to IBM Unica NetInsight 8.6.0 on a Windows system

Note: If you are performing an upgrade on a partitioned profile, please proceed first to the instructions for performing a partitioned upgrade.

Important: If you are using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported. If you have an earlier Oracle client version (10g) in the path of an environment variable, you must update the environment variable to point to Oracle 11g before upgrading. For information about setting environment variables, see the *IBM Unica NetInsight Administrator's Guide*.

To upgrade to 8.6.0 on a Windows system:

1. Ensure that:
 - No profiles are currently being updated.
 - No reports are running.
 - There are no reports in the queue.

2. Back up your current installation.
3. Log on to the server console with administrative access rights.
4. If you are currently using a language pack, obtain the corresponding language pack for NetInsight 8.6.
5. Double-click the self-extracting archive.
6. When the installation program prompts you for the program directory, enter the current program directory.
The default program directory is C:\Program Files\NetInsight.
7. If the installation program prompts you for the language pack, browse to the IBM Unica Web Analytics language pack for Release 8.6.
The installation program then prompts you to confirm that you have backed up the installation from which you are upgrading.
8. Click **Yes** only when you have backed up the listed directories.

NetInsight confirms your settings and then upgrades your current installation.

The upgrade process is logged to `program_directory/ntupgrade.log`.

When the upgrade process is complete, you must perform the following tasks:

- **Configure profiles to use the geographic database (optional):** If you require access to geographic reports in any of your profiles, configure each of these profiles to use the geographic database. For information, see the *IBM Unica NetInsight Administrator's Guide*.
- **Resample any profiles that use sampling.** Use the command `nettracker short_profile_name -resample` to resample the profile.

For information on database errors you might receive during the upgrade process, see the section for your database.

To upgrade to IBM Unica NetInsight 8.6.0 on a UNIX system

Note: If you are performing an upgrade on a partitioned profile, please proceed first to the instructions for performing a partitioned upgrade.

To upgrade to 8.6.0 on a UNIX system:

Important: If you are on 64-bit Linux and using Oracle as the database, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported on 64-bit Linux. If you have an earlier Oracle client version (10g) in the path of an environment variable, you must update the environment variable to point to Oracle 11g before upgrading. For information about setting environment variables, see the *IBM Unica NetInsight Administrator's Guide*.

1. Ensure that:
 - No profiles are currently being updated.
 - No reports are running.
 - There are no reports in the queue.
2. Back up your current installation.
3. If you are currently using a language pack, obtain the corresponding language pack for NetInsight 8.6.0.
4. Unpack the archive into a temporary directory.

For example:

- For **Oracle**:
 - gunzip NetInsight-8.6-Oracle-0S.tar.gz
 - tar xvf NetInsight-8.6-Oracle-0S.tar
 - For **DB2**:
 - gunzip NetInsight-8.6-DB2-0S.tar.gz
 - tar xvf NetInsight-8.6-DB2-0S.tar
5. Run the ntupgrade program.
For example:
./ntupgrade
 6. Read and accept the license agreement.
 7. When the installation program prompts you for the program directory, enter your current program directory.
The default program directory is /usr/local/NetInsight.
 8. If the installation program prompts you for the language pack, type the full path to the IBM Unica Web Analytics language pack for NetInsight 8.6 and press Enter.
The installation program prompts you to confirm that you have backed up the installation from which you are upgrading.
 9. Enter Yes only when you have backed up the listed directories.

NetInsight confirms your settings and then upgrades your current installation.

The upgrade process is logged to program_directory/ntupgrade.log.

When the upgrade process is complete, you must perform the following tasks:

- **Configure profiles to use the geographic database (optional):** If you require access to geographic reports in any of your profiles, configure each of these profiles to use the geographic database. For information, see the *IBM Unica NetInsight Administrator's Guide*.

Note: If you are using the NetInsight Geographic Database with an earlier version of NetInsight, you must upgrade to geographic database for version 8.6.0. Download the latest version of the geographic database from the download site URL you received from your IBM customer representative. For details, see the *IBM Unica NetInsight Administrator's Guide*.

- **Resample any profiles that use sampling.** Use the command nettracker short_profile_name -resample to resample the profile.

For information on database errors you might receive during the upgrade process, see the section for your database.

Note: For Linux environments: The user running Apache requires write permission to the <NetInsight>/data/admin/logging directory. After upgrading, check the permissions on the logging directory. If they are owned by a user other than the Apache user, you may need to change their access permissions to allow write access to the Apache user if you have umasks set.

To upgrade to IBM Unica NetInsight 8.6.0 64-bit

Prerequisites to upgrade

Prior to upgrading to NetInsight 64-bit:

- Ensure that the operating system is 64-bit.
- Install the Oracle 64-bit client (either the full client or the instant client, depending on where your database is located).
- Other standard prerequisites to upgrade as described elsewhere in this guide also apply.

Important: If you are installing on Windows or 64-bit Linux, you must use the Oracle 11g client. Earlier Oracle client versions are no longer supported.

To upgrade to NetInsight 64-bit:

1. Update the Oracle client library path in the operating system.
2. As necessary, upgrade previous installations of the 32-bit Oracle Data Conduit to 64-bit as follows:
 - a. Acquire the archive file containing the 64-bit data conduit.
 - b. Extract the contents and overwrite the 32-bit .so and apitest files with their 64-bit counterparts.
3. In Apache, update the Oracle environment variable path to point to the Oracle 64-bit client.
4. Restart Apache.
5. Run the NetInsight 64-bit installer, following the standard instructions for installation or upgrade described earlier in this guide.

To perform a partitioned upgrade

Note: These instructions pertain only to partitioned upgrades to NetInsight versions that include schema changes. If there are no schema changes in your upgrade path, follow the instructions for a non-partitioned upgrade for your operating system.

These instructions are for installations of NetInsight with partitioned profiles using SQL Server or Oracle as the database.

Before you begin a partitioned upgrade:

1. Back up your Oracle or SQL Server database.
2. Back up your current installation directory, including:
 - The NetInsight data directory and its subdirectories. The data directory is in the program directory. The default location of the program directory for Windows is C:\Program Files\NetInsight. The default location for UNIX is /usr/local/NetInsight.)
 - The HTML directory and its subdirectories (in your Web site's HTML or wwwroot directory).
 - The CGI-BIN directory and its subdirectories (located in your Web server's CGI-BIN or scripts directory).
3. Ensure that:
 - The Web server is not running.

- There are no .lck files or problems with any profiles.
- No profiles are currently being updated.
- No reports are running.
- There are no reports in the queue.
- Any UNIX cron jobs are temporarily disabled.

To perform a partitioned upgrade:

1. For each partitioned profile, create a record in the **<reportroot>_Misc** table with the values NoUpgrade and 1. This instructs the upgrade program to not upgrade the profile's schema.

The reportroot is a table prefix that is unique for each profile. All the table names for a given profile start with the same reportroot, which is based on the short profile name. Contact technical support if you need assistance determining the reportroot for a profile.

2. Run the upgrade program.

At the end of the upgrade program, you are instructed to update your profiles. Do not update any partitioned profiles at this time.

3. Select one of your partitioned profiles and create a NetInsight 8.6.0 schema definition file based on the latest data/webschema.xml file. Partition the new file exactly like the profile's existing partitioned schema definition file.
4. Add or modify the schema file element in the profile's configuration file to refer to the new schema definition file.
5. Make a copy of the upgrade schema file for the profile you are upgrading and modify it as described below. Upgrade schema files are located at: program_directory/upgrade/.

The webschema.xml file creates and/or restructures tables in partitioned upgrades. The file lists only the versions/tables that will be upgraded or are affected by the upgrade. It contains an xml element for each upgrade.

```
<tables fromversion="ver#" toversion="ver#_next">
<table name="RetAction">...
```

- a. Save the copied file under a different name of your choosing. You can save it to any location on the machine you are upgrading.
- b. As you did in step 3, modify the file so that it is partitioned exactly like your current partitioned schema definition file for the profile. You must modify the table definitions for all the sections in the upgrade path whose version contains schema changes.

For details, see "Creating a Schema Definition File for a Partitioned Database" in the *IBM Unica NetInsight Database Administrator's Guide*.

6. If you are upgrading on a UNIX system, copy the **ntupgrade** executable into the program directory. If you are upgrading on a Windows system, the executable is already in the program directory.
7. Run the following command (all one line) to generate create-and-drop SQL files:

```
ntupgrade -partition -i Path/to/schema_definition_file
-p short_profile_name -f from_version
```

8. Open the create-and-drop files and review them for any errors. Make sure they contain the correct SQL and that the partition definitions are correct.
9. Execute the create-and-drop files. Note that if you have create-and-drop files for more than one version, these files must be executed in release order (for example, create<ver#>.sql, drop<ver#>.sql, create<ver#_next>.sql, drop<ver#_next>.sql).

If you are upgrading to NetInsight for SQL Server 2005:

- Connect as a user with the *db_owner* role and highlight the database that contains the partitioned tables.
- Open the create-and-drop files in Management Studio and click **Execute**.

If you are upgrading to NetInsight for Oracle, use SQL*Plus to execute the create-and-drop files. (Connect as the user that connects as.) For example:

```
@ "C:\temp\create<ver#>.sql"
```

10. Update the profile by running the following command at the command line prompt:

```
nettracker short_profile_name -update
```

Where:

- *Path/to/schema_definition_file* is the path and filename for the modified copy of the upgrade webschema.xml you created for this profile.
- *short_profile_name* is the profile name that appears in parentheses in the Available Profiles list in the Profile Manager. You can display a list of short profile names by running the command:
- *from_version* is the previous version of the installation. From example, -f 8.5.

Running this command creates the files `create<ver#>.sql` and `drop<ver#>.sql`. The create file contains all table creations and modifications. The drop file contains all drop table and drop temp table statements. Version-specific create and drop files are created for each NetInsight release in the upgrade path that contains schema changes. (If a particular release contains no schema changes, files are not created for that version.)

Note: You will need to know the location of the create-and-drop file later, so make note of it now.

11. Repeat steps 3-10 for each partitioned profile.

Chapter 5. Database installation errors

If the installation process generated errors, see the section below for your database type and possible solutions.

DB2 installation error messages

The NetInsight installation program attempts to connect to your DB2 database and create tables that NetInsight needs to generate reports. During this test, you may receive an error message if NetInsight detects a problem with your current DB2 configuration that will prevent it from running. Some common error messages and their causes are:

- Could not allocate the environment handle
NetInsight was unable to find the local DB2 instance you specified.
- The database alias name or database name "NAME" could not be found
You specified an undefined database alias.
- A communication error has been detected. Communication protocol being used: "TCP/IP". Communication API being used: "SOCKETS". Location where the error was detected "". Communication function detecting the error: "connect". Protocol specific error code(s): "111", "*", "*"
The remote instance you are trying to connect to is not running.
- No start database manager command was issued
The local database you are trying to connect to is not running.
- Attempt to establish connection failed with security reason "#"
("<description>")
You do not have permission to log into the DB2 database (due to an incorrect user name, invalid password, etc.).
- User "USER NAME" does not have the CONNECT privilege
Your user name and password were correct, but you are not allowed to connect to the database.
- USER NAME does not have the privilege to perform operation "OPERATION"
You do not have the rights required to perform some of the database functions necessary to run NetInsight in the DB2 database you specified.
- Setup was unable to connect to the NetInsight interface using the CGI URL you provided.
This occurs post-installation on Windows/IIS platforms. To resolve the issue, edit the Internet Guest Account user (usually IUSR_<COMPUTERNAME>) by making it a member of the DB2USERS group. Then restart the IIS Admin service.

Most of these error messages are the result of problems with your DB2 configuration. If necessary, check your DB2 documentation for help resolving them.

Oracle installation error messages

The NetInsight installation program attempts to connect to your Oracle database and create tables that NetInsight needs to generate reports. During this test, you may receive an error message if NetInsight detects a problem with your current Oracle configuration that will prevent it from running. Some common error messages and their causes are:

- **Could not resolve service name**
NetInsight was unable to locate the computer where your Oracle service is running, or a service with the name provided running on that computer.
- **Invalid user name/password**
You do not have the ability to log onto the Oracle database with the user name and password you provided.
- **No listener**
You specified a service name which resolved to a computer that is not currently running Oracle.
- **User lacks privilege**
You do not have the rights required to perform some of the database functions necessary to run NetInsight in the Oracle database you connected to.
- **No privileges on tablespace NAME**
You do not have space in the database allocated to you.
- **ld.so.1: ntinstall: fatal: libcIntsh.so.10.1: open failed: No such file or directory**
You are installing NetInsight with Oracle 11g and do not have the Oracle Client 10.2 32-bit libraries on your LD_LIBRARYPATH. When installing NetInsight with Oracle 11g, you must use the Oracle 10.2 32-bit client. (Post-installation you can upgrade the client to version 11 if you choose.)

These error messages are a result of problems with your Oracle configuration. If you receive one of these error messages, check your Oracle documentation or ask your database administrator for help resolving it.

SQL Server installation error messages

The NetInsight installation program attempts to connect to your SQL Server database and create various tables that NetInsight needs to generate reports. During this test, you may receive an error message if NetInsight detects a problem with your current SQL Server configuration that will prevent it from running. Some common error messages and their causes are:

- **Specified SQL server not found**
NetInsight was unable to locate the computer where SQL Server is running.
- **Login failed for user "username"**
You do not have the ability to log into the SQL Server database with the user name and password you provided. Check with your database administrator for a valid user name.
- **The user "user name" must have the db_owner role set for database "database"**
You do not have the rights required to perform some of the database functions necessary to run NetInsight in the SQL Server database you specified.

These error messages are a result of problems with your SQL Server configuration. If you receive one of these error messages, check with your database administrator or your SQL Server documentation for help resolving it.

Chapter 6. Browser configuration

Read this chapter for information about configuring different browsers.

Configuring Microsoft Internet Explorer

For optimal performance, configure Internet Explorer to check for newer versions of stored pages every time you visit a web page.

Configuring Mozilla Firefox

For optimal performance, configure Firefox according to these guidelines.

- Set Firefox to use 0 MB of space for the cache.
- If you want to use the Drill Anywhere feature in NetInsight, make sure the advanced JavaScript option **Disable or replace context menus** is not selected in Firefox.

Setting MIME types for Internet Explorer

Note: You must have administrative rights to complete this task.

You change the MIME settings for Internet Explorer to allow users to export report data as a .csv or .rtf file. In the Control Panel, configure the CSV, DOC, RTF, and XLS file types to confirm open after download.

Users should now see the **Save As** dialog box when exporting report data.

Note: You must change the MIME settings on the NetInsight Web server in addition to changing MIME settings for Internet Explorer.

About printing chart legends in Internet Explorer

The legends in NetInsight summary graphs are table cells with background colors set. By default, Internet Explorer does not print background colors. To print the legends in color, you must turn on background printing in Internet Explorer.

Chapter 7. Configuring your site's web sever

Read this chapter for information about configuring different web servers.

About Web server password protection

NetInsight contains features that you can use to restrict access to profiles and options, but your Web server's built-in security must be used to completely restrict access. See the documentation for your Web server for more information.

To schedule NetInsight to run nightly

You complete this task to have NetInsight run nightly, to automatically generate reports, on both UNIX and Windows servers.

1. On UNIX servers:
 - a. Open the system's crontab file.
 - b. Add the command to run the nettracker utility nightly:

```
0 0 * * * /path/to/program/directory/nettracker all -update -quiet  
-email -dir /path/to/program/directory/
```
2. On Windows servers:
 - a. Ensure that the task scheduler is running. If it is not, use the Control Panel to set it up to start automatically.
 - b. Use the AT command from the MS-DOS command prompt to schedule a job. For example, to update your profile each night at 11:05 PM, use the AT command:

```
AT 11:05PM /every:m,t,w,th,f,sa,su "c:\Program Files\NetInsight\  
nettracker.exe" all -update -quiet -email -dir "c:\Program  
Files\<NetInsight>"
```

About MIME types and exporting reports

NetInsight can export data, allowing users to import reports into popular software products such as Microsoft Excel, Access, and Word. NetInsight uses the .csv, .html, and .rtf extensions when exporting data. For optimal performance, the best practice is to add the MIME type application/octet-stream for the file extension .csv.

For more information consult your Web server documentation.

Enabling the scripts directory in IIS

In IIS the scripts directory is not enabled by default. The NetInsight installation program automatically enables the scripts directory. If necessary, you can manually enable the scripts directory. For more information, see the Microsoft IIS documentation.

Enabling log file browsing in IIS

With IIS 6.0 and 7.0, you cannot browse for your log files from within NetInsight until you enable log file browsing. For the user name that IIS runs as (usually the anonymous Web user), change the permissions for that user to **Full Control**. For more information, see the Microsoft IIS documentation.

Note: If your log files are on a mapped network drive, NetInsight may have difficulty finding them. For more information and additional workarounds, go to the Microsoft Knowledge Base (located at support.microsoft.com) and search using the keywords "IIS mapped drives".

Setting MIME types

You change MIME settings on the server to allow users to export report data as a .csv or .rtf file. Doing so allows users to access the **Save As** dialog box when they export a report. You must set both the .csv and .rtf file extensions to application/octet-stream. For more information, see your web server documentation.

Note: If users are not seeing the **Save As** dialog box when exporting data, you must change MIME settings for Internet Explorer.

Logging browser and referrer information

Follow the guidelines for your web server to log browser and referrer information, making this data available to NetInsight.

Apache guidelines

Access the httpd.conf file to configure the following:

- Find the LogFormat line: `LogFormat "%h %l %u %t \"%r\" %>s %b \"%{Referer}i\" \"%{User-Agent}i\""` combined
If the line does not exist, add it.
- Use the **Combined Log Format**.

IIS guidelines

Access the Internet Services Manager to configure the following:

- Select **W3C Extended Log File Format** for the active log format.
- Select the **User Agent** field (for browser and platform information) and the **Referrer** field.

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