

GW3 Data Warehouse Manual Install Steps

This document will outline the steps for installing a Data Warehouse.

Assumptions and requirements

There are some assumptions and requirements for manually installing a Data Warehouse and they are listed below. Some steps require elevated SQL privileges and will be noted what level of access is required and why for those steps.

- This document assumes and requires that the lowest level of access to the Data Warehouse at any step will be db_owner.
- The SQL Server instance the Data Warehouse is being installed to must have the SQL Server Agent installed and running prior to executing the second Data Warehouse script.
- Assumption, all steps that require elevated privileges will be performed with an account having Server Administrator privileges. – **Some elevated steps may not require full Server Administrator privileges however for simplicity in this document this will be the assumed level of access for these steps.**

Setup and Installation steps

There are three main parts of the installation.

Gathering the Data Warehouse installation scripts.

To obtain the scripts needed for the installation, you will need the installation media (DVD or .zip file) for the version of GenWatch being used.

1. Navigate to the Setup.exe application (this will be on the root of the DVD media or the sub directory of the unzipped file). For TRBO installations, the executable will be named TRBO_Setup.exe. For non TRBO installs this will be named GW3_Setup.exe.
2. Run the Setup.exe. – Note this requires administrator privileges. This step may be done on any machine desired and will not require installation of software applications.
3. Select the “Database Only” option on the dialog that results.
4. On the Database Configuration dialog, click the “Write Script Files” link text at the bottom left of the dialog. This should result in a Windows explorer window opening to the current user’s documents\genesis\DBScripts folder that now contains a number of .sql files.
5. Exit out of the installation by clicking the close button on the upper left hand corner of the installation dialog.

Deploying the Data Warehouse from the installer scripts.

To proceed with the installation, you will need to have available the scripts obtained from the installer. The scripts need to be deployed in the order listed below. Some scripts will be noted as requiring elevated privileges to be deployed or have specific prerequisites for being run.

1. The first script to be run is the `Create_Warehouse_2_xx_xx_xx_DB.sql` (x's will match the version of the software being installed). This script creates the database and some of the required tables.
 - **This script requires elevated privileges to run.** It uses [Master] and creates the GW_DW database.
 - This script has a prerequisite that the server instance does not already have a database named GW_DW.
2. The second script to run is the `DataWarehouseRemoveTriggersAddJob.sql`. This script will make some modifications to the data warehouse and add a server job for purging and pulling data (The job will be named GW_DW_Daily).
 - **This script requires elevated privileges to run.** It creates a SQL Server Agent job.
 - This script has a prerequisite that the SQL Server Agent be running on the SQL instance on which the Data Warehouse is being deployed.

Post install configuration.

A number of manual changes are required to setup the Data Warehouse to pull data from the Data Server and configure users for reporting. There are also optional configuration changes that will be covered in this section.

1. Create an SQL login on the data server 's SQL server instance. Map this login to the GW database and grant it the role of db_gw3user.
 - **This step requires elevated privileges to complete.** Adding an SQL server login requires higher level privileges than db_owner.
2. The SQL server instance that the Data Warehouse is on needs to have a Linked Server added that links to the SQL server instance the data server is on. Use the SQL login created in step one as the security context for the linked server.
 - **This step requires elevated privileges to complete.** Adding a linked server requires higher level privileges than db_owner.
3. Create one entry in the PullServers table in the GW_DW database. In the Server column, enter the server instance name from which this Data Warehouse will pull data. In the DB column, enter the Database name (GW).
4. The GW_DW_Daily job is scheduled by default to run at 1:00 AM. It may be edited to run at a different time of day.
 - **This step is optional and requires elevated privileges to complete.** Editing a server job requires higher privileges than db_owner.
5. Ensure that the account specified as the service account when installing the GenWatch software has an SQL login on the data warehouse SQL Server instance. This account will need to be mapped to the GW_DW database with the role of db_gw3service.
 - **This step requires privileges greater than db_owner.** This step is required to be able to run reports against the data warehouse.
6. For all GenWatch logins that should be able to report on the data warehouse create an SQL Login on the data warehouse server instance. These SQL logins will need to be mapped to the GW_DW database with the role db_gw3user.
 - **This step requires privileges greater than db_owner.**
 - Notes: This step will have to be done anytime a new user that should have reporting rights to the Data Warehouse is added to the GenWatch security module. When a GenWatch user is removed from the security module, the corresponding SQL login on the Data Warehouse server instance will need to be removed or disabled.