v5.5

Websense Enterprise® Reporting
Installation Guide

Websense Enterprise Reporting Installation Guide

Contents

Important Reporting Installation Information

To successfully install Websense® Enterprise® Reporting, you need to know about:

◆ Downloading and unzipping the installation files
◆ How to use Websense Setup
◆ Basic information about Reporting components and modules
◆ How to get more detailed information about pre-installation, installation and post-installation

Downloading and unzipping the installation files

The Websense Enterprise installation files are unzipped from Websense Setup, which is downloaded from the Websense Web site or launched from the Websense Installation CD.

1. Click **Install**.

2. Accept the default location to unzip the installation files, or Browse to a different location.

3. Click Extract to unzip the installation files.

All the installation files will be unzipped.

Websense Setup will open automatically.

How to use Websense Setup

Websense Setup installs:

◆ Websense Enterprise
◆ Websense Enterprise Reporting
◆ Websense Enterprise Client Policy Manager™

i **IMPORTANT**

For performance reasons, it is **strongly** recommended that these three products not be installed on the same machine.

Each of these products includes several modules which also contain separate components. This Install Manager can be used to install modules or even single components on separate machines. It is meant to be used at each appropriate machine for installation.

Please see the *Websense Enterprise Deployment Guide* for specific information on how to best deploy the products, modules and components. The link at the top of the Websense Install Manager opens the current version of the *Websense Enterprise Deployment Guide*.

Run Websense Setup to install Websense Enterprise, then you will be asked to re-boot.

Run Websense Setup again to install Websense Enterprise Reporting. Follow the onscreen instructions.

Reporting Modules and Components

The reporting modules and their components are:

- **Websense Enterprise Reporter**™ - Client-based application that communicates with Websense Enterprise and manages information about Internet activity.
    - **<u>Log Server</u>** - Required to receive, store and report on Internet activity.
    - **<u>Log Database</u>** - Required storage for data about Internet activity.
    - **<u>Database Engine</u>** - Required to install either Microsoft SQL Server or MSDE. A free copy of MSDE is available for download via a link provided during the Websense Enterprise Reporting installation.
    - **Reporter** - Client-based application that produces reports that can be generated automatically, sent via email or printed.
- **Websense Enterprise Explorer**™ - Web-based application that produces a variety of easy-to-understand summary reports.
    - Web server - either Apache or Microsoft IIS (Apache is included in the installation package).
    - Web browser - Microsoft Internet Explorer (not included in installation).
- **Log Database Manager**- Web-based application that assists in managing the size of the Log Database.
    - Web server - either Apache or Microsoft IIS (Apache is included in the installation package).
    - Web browser - Microsoft Internet Explorer (not included in installation).

The three underlined components above are required to use **<u>any</u>** other Reporting component or module; Log Server, Log Database and the Database Engine.

All of the reporting modules and their components rely on Websense Enterprise. They are always installed after Websense Enterprise.

> ✔ **NOTE**
> Log Database Manager must be installed on the same machine as Log Server.

For further details about these modules, how they work and how they work together with Websense Enterprise, please refer to the first chapter in the *Websense Enterprise Administrator's Guide*.

Finding out what you need to know

Chapter	When	What
2	Before you install	Verifying system requirements
3	Before you install	Determining Websense and network information
4	Before and after you install	Selecting the Web server, Setting Up Users and Security
5	Install	Running the installer and Connecting to a Log Database
6	After you install	Configuring for Windows Trusted Connection
7	Before you upgrade	Information about upgrading to this version, and also about migrating the Log Database from a previous version.
8	Uninstall	Removing Websense Enterprise Reporting

Verifying System Requirements

Before any of the Websense Enterprise Reporting modules are installed, Websense Enterprise must be installed and working.

It is now required that Websense Enterprise Reporting be installed with the same version of Websense Enterprise.

Websense Enterprise Reporting requires that you first install a database engine, which must be either Microsoft SQL Server or Microsoft Data Engine (MSDE).

> ✓ **NOTE**
> During installation of the Reporter components, the machine may need to be rebooted, depending on whether the machine has the necessary DLLs for installation and operation. This may occur near the beginning of the installation or at the end. You may or may not be given an option to reboot, so be prepared in case the Reporter installation performs a reboot automatically.

- Selecting a Database Engine
- Installing with MSDE
- Installing with SQL Server 7.0
- Installing with SQL Server 2000
- System Requirements for Reporting components

Selecting a Database Engine

The descriptions below provide an overview of Microsoft SQL Server and Microsoft Data Engine (MSDE), either of which can be used by Reporter.

> *i* **IMPORTANT**
> The database engine must be installed before you install any other Reporting components.

◆ **SQL Server** – works best for larger networks and those organizations with a high volume of Internet usage. Also, SQL Server performs better than the Microsoft Database Engine (MSDE) for reporting over long periods of time, such as several weeks or months.

   If a copy of SQL Server exists on your network already, Websense recommends using this solution; otherwise SQL Server must be purchased separately. Separate installation instructions are provided for installing Reporter with SQL Server 7.0 and with SQL Server 2000.

   If you use SQL Server 2000, please be aware that you must install **Connectivity Only** option on each machine running Reporter components.

◆ **Microsoft Data Engine (MSDE)** – Log Databases are only allowed to grow to about 1.5 GB. Upon reaching this maximum size, the Log Database is automatically dated and saved (rollover), and a new Log Database is created. Reports may be generated from any Log Database.

   MSDE works best for smaller networks and organizations that either have a low volume of Internet access, or plan to generate reports and then archive on a daily or weekly basis. MSDE should be installed via the link provided during the Reporting installation program.

If the descriptions above leave you still undecided about which database engine to use, you might want to begin with MSDE, which is a limited edition of SQL Server. You can upgrade your Log Database from MSDE to SQL Server at a later time without loss of data.

Database Engine System Requirements

The system requirements vary according to the database engine. Websense Reporting works with either Microsoft Data Engine (MSDE) or Microsoft SQL Server. Websense recommends using MSDE in organizations with less Internet activity, and Microsoft SQL Server in organizations with higher volume.

	• Microsoft SQL Server v7 (SP 1 or higher) **• Microsoft SQL Server v2000 (SP 1 or higher)**	**MSDE v2000 (can be downloaded during installation)**
Operating System	• Microsoft Windows NT 4.0 Server (Service Pack 6a or higher) • Microsoft Windows 2000, Server, or Advanced Server (Service Pack 1) • Windows 2003 Enterprise and Standard editions	• Microsoft Windows NT 4.0 Server (Service Pack 6a or higher) • Microsoft Windows 2000, Professional, Server, or Advanced Server (Service Pack 1) • Microsoft Windows XP Professional • Microsoft Windows 2003
RAM	512 MB	256 MB
Processor	Refer to Microsoft documentation.	Pentium II processor (Pentium III with 350 MHz recommended)
Web browser	Microsoft Internet Explorer v5.5 or later	Microsoft Internet Explorer v5.5 or later
Disk space	Refer to Microsoft documentation	3 GB recommended (per database)

Installing with MSDE

> **NOTE**
>
> If replacing a previous installation of MSDE and upgrading to a foreign language version of MSDE or Microsoft SQL Server, you will need to uninstall the English version of MSDE <u>before</u> installing the non-English version of MSDE or Microsoft SQL Server.
>
> You can install MSDE as a part of Microsoft Access, or via the link provided during the Reporter installation.

MSDE should be installed from the free version of MSDE from the link available during the Reporting installation. The standard MSDE installation requires a special setup to work with Websense Reporting if you are going to use a remote installation of the database engine. This setup is automatically downloaded from this link.

1. Log on as a user with *local administrator* privileges to the database machine.
2. Close any open applications, including the Windows Control Panel.
3. Download Websense Setup from the Websense Web site or or launch it from the Websense Installation CD. Unzip the installation files.
4. Websense Setup will launch automatically. Follow the instructions on each screen until you come to the options about installing Websense Enterprise, Websense Enterprise Reporting, or Client Policy Manager.
5. Click the radio button next to Websense Enterprise Reporting.
6. Follow the instructions on each screen until you come to an option to download a free copy of MSDE.

   Select the appropriate language version, then follow the instructions.
7. Re-boot your machine after MSDE has finished the installation.

> **IMPORTANT**
> You must restart the machine *before* installing any other Reporter components.

8. If the installation was successful, MSDE will be running. MSDE must be running when you install the Log Server.

Installing with SQL Server 7.0

Microsoft SQL Server must be purchased separately. If it has not been installed in your network, see Microsoft documentation for system requirements and installation instructions. Generally, follow these steps.

1. Install SQL Server 7.0 according to Microsoft instructions, if it has not already been installed.
2. Make sure SQL Server is running.
3. Make sure SQL Server Agent is running.
4. Obtain the SQL Server login ID and password for a SQL Server Administrator, or for an account that has rights to create, modify and delete databases. You will need this login ID and password when you install Reporter components.
5. Restart the SQL Server machine after installation, and then install Log Server on an appropriate machine.

> **NOTE**
> Be sure to restart the machine after installing Microsoft SQL Server 7.0 and before installing Log Server.

Installing with SQL Server 2000

Microsoft SQL Server must be purchased separately. If it has not been installed in your network, see Microsoft documentation for system requirements and installation instructions. Generally, follow these steps.

1. Install SQL Server 2000 according to Microsoft instructions, if it has not already been installed.

2. Make sure SQL Server is running.

3. Make sure SQL Server Agent is running.

4. Obtain the SQL Server login ID and password for a SQL Server Administrator, or for an account that has rights to create, modify and delete databases. You will need this login ID and password when you install Reporter components.

5. Restart the SQL Server machine after installation, and then install Log Server on an appropriate machine, as described in the next section.

> ✔ **NOTE**
> Be sure to restart the machine after installing Microsoft SQL Server 2000 and before installing Log Server.

6. *IMPORTANT:* Set up the Log Server machine and each Reporter machine to recognize and communicate with SQL Server 2000. This can be done in one of two ways:

   • Preferred: Run the SQL Server 2000 installation program on each appropriate machine and select *Connectivity Only* when asked what components to install. *You must restart the machine after installing the connectivity option.* See Microsoft SQL Server documentation for details.

   • Alternative: Run the SQLredis.exe program, provided in the Enterprise Reporting package, on each appropriate machine. This program, created by Microsoft for SQL Server 2000 users, updates the ODBC drivers on the machine so they are compatible with SQL Server 2000. (For additional information on SQLredis.exe, please contact Microsoft.)

To use the SQLredis.exe program, please follow these steps.

a. Log on as a user with *local administrator* privileges to the Log Server machine.

b. Close any open applications, including the Windows Control Panel.

c. Download the Websense Install Manager from the Websense Web site or or launch it from the Websense Installation CD.

d. Click the Install button under Websense Enterprise Reporting.

e. Double-click the SQLredis.exe program that is automatically unzipped in step **d**.

    This program runs as a "silent install," meaning that no dialog boxes or progress bars appear.

f. Verify that the program has finished running as follows:

    Make sure SQLredis.exe and dasetup.exe no longer appear on the Process tab of the Task Manager.

g. *REQUIRED:* Restart the machine. Do not attempt to install Reporter components until after restarting the machine.

✓ **NOTE**
   If you choose No to the trusted connection option when installing Reporter components after running SQLredis.exe, sometimes the SQL Server Login dialog box opens with the Use Trusted Connection option checked. Please uncheck the option and enter the appropriate login ID and password.

System Requirements for Reporting Components

i **IMPORTANT**
   Log Database Manager and Explorer require a Web browser as the user interface. All the online help for the Reporting products also requires use of a Web browser. If your Web browser has strict pop-up blocking, it may block use of the Websense Enterprise Reporting products or limit use of some of the features.

- Reporter
- Log Server
- Explorer
- Log Database Manager

Reporter

Operating System	• Windows NT 4.0 Workstation or NT 4.0 Server (Service Pack 6a) • Microsoft Windows 2000, Professional, Server, or Advanced Server (Service Pack 1) • Microsoft Windows XP Professional • Microsoft Windows 2003
RAM	256 MB
Processor	Pentium II processor (Pentium III with 350 MHz recommended)
Web browser	Microsoft Internet Explorer v5.5 or later
Monitor resolution	800 x 600 or higher resolution, with at least 256 colors
Print driver	Appropriate to the operating system, selected as default

Log Server

The Log Server can successfully log data for up to 99 Websense Filtering Services.

Operating System	• Microsoft Windows 2000 Server Service Pack 3 (SP3) or higher, or Advanced Server SP1 • Microsoft Windows 2003
RAM	256 MB
Processor	Pentium II processor (Pentium III with 350 MHz recommended)
Web browser	Microsoft Internet Explorer v5.5 or later

Explorer

Your company may encrypt Web traffic containing sensitive information (HTTPS) or not (HTTP). Explorer will run over HTTP or HTTPS (if your Web server supports this type traffic).

The Web server portion can be installed on any machine that can connect to the Log Database.

Windows authentication is supported when the Web server is Microsoft IIS.

Web Browser	Microsoft Internet Explorer - version 5.5 or higher **NOTE:** If Internet Explorer version 6.x is used, there may be issues when accessing the Explorer Web Server even though it is an intranet site. In this case, add the Explorer URLs to the "Trusted Sites" list and reduce the security for trusted sites to "medium."
RAM on client PC	256 MB minimum 512 MB recommended
Web Server Operating System	• Windows 2000 Server SP3 • Windows 2003 Server (Web, Enterprise, or Standard editions)
Web Server	• Microsoft IIS - version 5 or higher • Apache Web Server - version 2.0.50 or higher
Directory Service	To use the "Department Level Reporting" feature, you must be using Microsoft IIS as the Web server and one of the following directory services: • NTLM • Active Directory

Log Database Manager

Web Browser	Microsoft Internet Explorer - version 5.5 or higher
RAM on client PC	256 MB minimum 512 MB recommended
Web Server Operating System	• Windows 2000 Server SP3 • Windows 2003 Server (Web, Enterprise, or Standard editions)
Web Server	• Microsoft IIS - version 5 or higher • Apache Web Server - version 2.0.50 or higher

Determining Websense and Network Information

- ◆ Specific Information about Websense Enterprise
- ◆ Which component on which machine?
- ◆ Before Installing Log Database Manager

Specific Information about Websense Enterprise

- You may need to specify the the machine name (or IP address) where the Websense Policy Server has been installed (during Websense Enterprise installation) and the port number it uses to communicate. The default port number is 55806.
- You may need to specify the port number for the Websense Information Service for Explorer. The default port number is 55814.

Which component on which machine?

The various components of Enterprise Reporting may be installed on the same or different machines, depending on the network and the database engine used. Consider the following information as you decide where to install the different components.

- ◆ **Database Engine**. Generally the database engine should run on a separate machine from other Reporter components. The installation program places the Log Database on the database engine machine. However, in environments with a relatively low volume of Internet activity, MSDE can run on the same machine with other Reporter components. It is recommended that Microsoft SQL Server run on its own machine.
- ◆ **Log Server**. Large environments and those with a high volume of Internet activity should consider placing Log Server on a separate machine. Log Server processing can consume considerable system resources, and could slow performance of other programs.

- **Reporter**. The Reporter application can be installed on multiple machines, with each connected to the same Log Database. This approach enables multiple managers, for example, to create reports from the same data. It also enables you to generate reports from different machines at different times.
- **Policy Server**. The Policy Server service must be running for the Log Server service to start. To maximize performance, *do not* install the Log Server or database engine on the Policy Server machine.

For further details on determining your Websense Enterprise Reporting configuration, please see the *Websense Deployment Guide*.

---

i **IMPORTANT**

If you install all the Reporting modules and components on the same machine, they can all be installed at the same time.

If you are going to install different modules and/or components on different machines, you must **first** install the Log Server and Log Database before installing any of the other modules or components.

Before Installing Log Database Manager

- **IMPORTANT**: You should back up your database before performing an archive or purge function. Backing up ensures a safe recovery of your data should an error occur during processing.
- Websense Log Database Manager is installed on the same machine as the Log Server.
- DO NOT install Log Database Manager on the same machine as Websense CPM Reporter.
- You must have a valid Policy Server address in the Log Server configuration.
- The Log Server service must be running.
- Websense Enterprise Manager has to be configured to send Internet traffic to the Log Server.

- ◆ Log Database Manager needs space on your hard disk to be able to complete the archive or purge process. Before performing an archive or purge operation on your Log Database, Log Database Manager will check to see if there is enough available disk space. If there is not, the operation will fail and that status will appear on the Job Status page.
- ◆ If you plan on using a Windows Trusted Connection, see the chapter on *Configuring for Windows Trusted Connection*.

Selecting the Web Server, Setting Up Users and Security

Websense Enterprise Reporter is a client/server application.

Websense Enterprise Explorer and Log Database Manager are web-based applications. You will have to use either Microsoft IIS or Apache as the Web server.

Your installation choices and security procedures will vary based on whether your Web server is Microsoft IIS or Apache. For technical support on the installation or operation of either of these Web servers, please contact Microsoft or Apache directly.

If both Web servers are installed on the machine where you are installing Reporting, you will be asked during installation to choose a Web server.

The Department Level Reporting feature in Explorer only works when using a Microsoft IIS Web server. For more information on this feature, see the *Websense Explorer Administrator's Guide*.

- Explorer with Microsoft IIS Web Server
- Explorer with Apache Web Server
- Using Reporter
- Setting Up Users for Log Database Manager

Explorer with Microsoft IIS Web Server

If you are using IIS, before beginning the installation, you need to know the name of the IIS Web site. You must enter the name of an existing Web site from IIS Manager in which to create the virtual directory. To create a new Web site or view existing Web sites, use the Windows Internet Services Manager. To access this tool from the Windows Start menu choose `Start>Programs>Administrative Tools>Internet Services Manager`.

Plan on setting up security for the nine Explorer modules and the Explorer settings file. These are the file names and types of access needed.

- **explorer.exe** - Give access to this module to those users who can run any report, but not make changes to the database settings.

- **explorer_anon.exe** - Give access to this module to those users who can run reports only with user IDs instead of user names.

- **explorer_auth.exe** - Give access to this module to those users who will be running department level reports.

- **legend.exe, timeline.exe, timelinecal.exe** and **cal_legend.exe** - Give access to these modules to every user who will be running reports.

- **settings.exe** and **prepare.exe** - Give access to these modules only to the Explorer Administrator who will make changes to the database settings, and may run any report.

- **wse.ini** - Give access to this module to the same users who have access to settings.exe.

Be prepared to set up security **after** installation for each module by limiting the permissions on the file. Locate the module file on the hard drive of the machine where Explorer was installed. The default file locations for installation of these module files is:

```
C:\Program Files\Websense Reporter\Explorer\scripts
\explorer.exe


C:\Program Files\Websense Reporter\Explorer\scripts
\explorer_anon.exe


C:\Program Files\Websense Reporter\Explorer\scripts
\explorer_auth.exe


C:\Program Files\Websense Reporter\Explorer\scripts \legend.exe


C:\Program Files\Websense Reporter\Explorer\scripts
\timeline.exe


C:\Program Files\Websense Reporter\Explorer\scripts
\timelinecal.exe
```
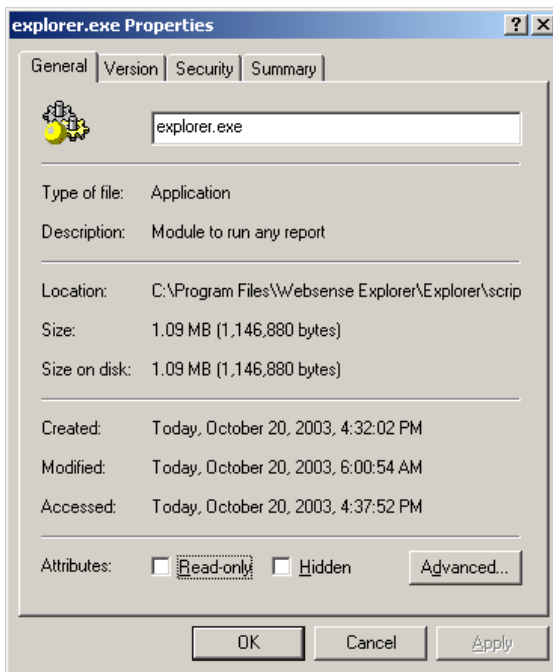
```
C:\Program Files\Websense Reporter\Explorer\scripts
\cal_legend.exe

C:\Program Files\Websense Reporter\Explorer\scripts
\settings.exe

C:\Program Files\Websense Reporter\Explorer\scripts\prepare.exe

C:\Program Files\Websense Reporter\Explorer\scripts\wse.ini
```
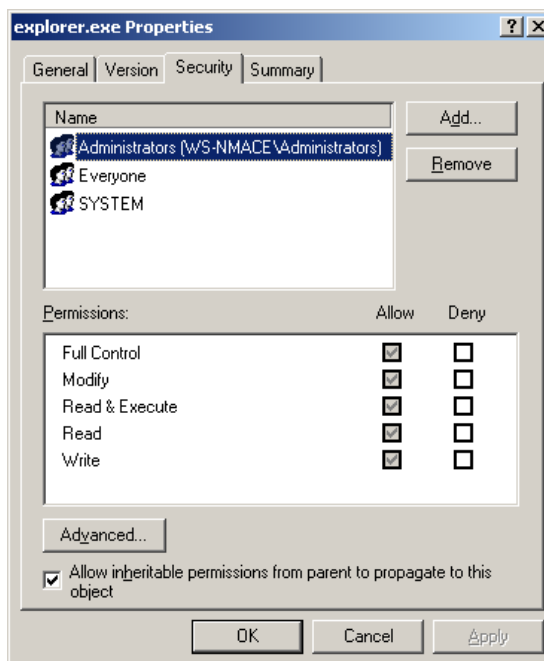
1. Locate each module file, right-click on the file name and select **Properties**.

2. Choose the **Security** tab.

3. Add users who need access to this module, and remove all users who should not have access to this module.

Repeat this process for each module file.

Explorer with Apache Web Server

If you are using Apache, during installation you will be required to set a user name and password for each of the three roles.

Explorer supports three roles when running on Apache: Administrator, HR User, and Restricted User.

- An Administrator can make changes to the database settings, and may run any report.

- An HR User can run any report but does not have access to the database settings.

- A Restricted User can run reports only with user IDs instead of user names (and has no access to the database settings).

More than one person may assume each role, and the user name and password for a role applies to that *role*, not a specific user.

Using Reporter

In order to generate reports in Reporter, you must log on as a user with *local administrator* privileges to the database machine.

Setting Up Users for Log Database Manager

In order to run Log Database Manager, you have to have Administrator level privileges in Websense Enterprise User Manager. If Websense Enterprise User Manager has not been installed, you must have the appropriate password for the Administrator user as defined in Log Database Manager

If either Websense Enterprise Real-Time Analyzer (RTA) or Websense Enterprise Client Policy Manager (CPM) Reporter has been installed, you can use the Websense Enterprise User Manager to set up users that can access Log Database Manager.

1. To access the User Manager, open a Web browser, and type the following URL: http://<machine name or IP address>/websense. You will need a password with Administrator level privileges to log on. The default user name is Administrator, and the password is blank.

2. Once you have successfully logged on, choose the **Administration link**, then the **User Manager** link.

3. You can add users, delete users, or change passwords in the User Manager. Make sure when adding a user you check "Administrator" in the Groups option, to give the Administrator privileges.

When Log Database Manager is installed, the user name is defaulted to **Administrator** and the password is set to what is configured in RTA or CPM Reporter for the **Administrator** user. If you change the password for the **Administrator** user in Log Database Manager, it will also be changed for any user that is logging in to RTA or CPM Reporter with that user name.

If RTA or CPM Reporter has not been installed, the user name is **Administrator** and the default password is blank. For security purposes, you should change the password the first time you log in. You will not be able to add other users unless either RTA or CPM Reporter is installed.

Running the Installer

 ◆ Installation Questions
 ◆ Connecting to a Log Database

Installation Questions

Your installation options and procedures will vary based on the Web server, modules and/or components that are being installed and the locations.

✓ **NOTE**

A new Log Database will be created during installation for this version. The name of this Log Database is "`wslogdb55`." You can run reports on previous versions of the Log Database after migrating them to the current version. See the chapter on *Upgrading and Migrating*.

Follow the onscreen instructions and provide the information requested.

 ◆ *You may get the message* "`Please Upgrade your MDAC version.`"

   If you get this message, you need to run `SQLredis.exe`, included with the Websense Reporting setup file. In order to connect to a remote SQL Server database with an instance name, you also may first need to run the SQLredis.exe process.

   Double-click the "`sqlredis.exe`" file, which was unzipped from the Websense Enterprise Reporting installation package. This process runs in the background. To find out whether the process is finished running, open the Windows Task Manager by selecting Ctrl-Alt-Delete and then choosing the Task Manager button. The Processes tab shows a list of all the processes that are currently running. When "sqlredis" is not listed, the process is complete

◆ *Who should receive monthly reports?*
List the email addresses.

◆ *Are you concerned about minimizing your database size?*
Reporter can report a separate Internet access for each Web page generated by a URL request (*visit*) or for each separate file that a page request generates (*hits*).
Choose report by Visits for a smaller Log Database and faster reporting, or by Hits which will record an entry for every single file requested, including graphic images and advertisements.
By accepting the default to Consolidate Log Records, you will minimize your database size by combining multiple visits by the same user to the same Internet domain.

◆ *Information about Websense Enterprise?*
IP address or machine name where the database engine (Microsoft SQL or MSDE) is installed.
IP address of the Policy Server.
Port number of the Policy Server if the default 55806 port is not available.

◆ *Do you want to help improve the quality of the Websense Enterprise Master Database by sending unrecognized and/or potential adult URLs back to Websense for analysis?*
No user-identifying information is ever sent to Websense.

◆ *Where is the location of the database engine?*
Enter the IP address (preferred) or machine name where the database engine (Microsoft SQL Server or MSDE) is installed.
It is recommended *not* to use a Trusted Connection when using MSDE. Contact your Database Administrator for assistance. Be aware that if you choose your Windows Login to access the database, you must have logged on to the installation machine with an account that has privileges to create, modify, and delete databases in SQL Server, as well as local administrator privileges for the machine. *After installation, be sure to*

*assign the appropriate login ID and password to the Log Server service,
as described in Chapter 7.*

IMPORTANT: If you installed SQL Server 7 or SQL Server 2000 with an
"instance name" other than MSSQLServer (the default), you must enter
the IP address (recommended if known) or machine name of the SQL
Server machine, followed by the instance name, as follows:

<IP address or machine name>\<instancename>

For example: **10.201.1.1\ReporterSql**.

Enter a Login name and Password for an account that has rights to create
a database on the MSDE machine. The default is sa with a blank
password. Then click Next.

◆ *Where should the Log Database be installed?*

Specify the location for installing the Log Database according to your
network setup.

■ *Log Server and the database engine on the same machine:* Click
  Browse to select a folder on the local machine for installing the Log
  Database.

■ *Log Server and the database engine on different machines:* Enter the
  path for installing the Log Database. This must be a local drive on the
  SQL Server machine, and the directory must already exist on that
  machine.

> ✔ **NOTE**
>
> A commonly reported problem during installation is
> failure to set up the correct path for installing the Log
> Database when the Log Server and SQL Server are on
> different machines. Please be sure to check this!

Make sure there is enough free disk space (at least 2 GB) on the specified
drive for the Log Database. Keep in mind that depending on the number
of users in your enterprise, and your network setup, your Log Database
may grow very rapidly.

Connecting to a Log Database

- ◆ **Log Database Manager** - Since Log Database Manager is always installed on the same machine as the Log Server, Log Database Manager will always be connected to the Log Database that Log Server is currently logging to.
- ◆ **Reporter** - If a Log Database is installed at the same time that Reporter is installed, Reporter will automatically be connected to that Log Database. If Reporter is installed separately, you will need to connect Reporter to a Log Database after the installation using the Reporter interface. Please see the *Websense Enterprise Reporter Administrator's Guide* for procedures on how to do that.
- ◆ **Explorer** - If Log Server is installed at the same time that Explorer is installed, Explorer will connect to the same Log Database that Log Server is logging to. If there is no Log Server detected, but Reporter is detected, then Explorer will connect to the same Log Database that Reporter is connected to.

  If there is neither, then the installer will ask for the Log Database name, location, user name and password in order to make a connection.

After installation, Reporter and Explorer can make a connection to a different Log Database in order to run reports on that database.

Configuring for Windows Trusted Connection

These Websense Reporting services must be manually configured to run as the Windows Authenticated User.

◆ Log Server service
◆ Reporter Scheduler service
◆ Log Database Manager service

When you want to run Explorer reports against a different Log Database, you make a change in the:

◆ Explorer settings page

Log Server Service Setup

Most Log Server setup is done via the Log Server Configuration window. However, there are two situations when you would need to set up the Log Server service with a user name and password.

- When Log Server is installed to use a trusted connection for database communications.
- When the Windows directory service is configured so that an application it perceives as anonymous, such as Log Server, cannot obtain a list of users and groups.

In these situations, Log Server must authenticate to either SQL Server or the directory service to obtain the user list.

Set up Log Server with the appropriate authentication information as follows:

1. Open the Windows Control Panel:
2. Select the `Websense Log Server` service in the list, and then click **Stop**.
3. Double-click the Websense Log Server service to open the Service dialog box.

4. On the Log On tab, select the **This account** option.

5. In the text box, enter the user name for an account with appropriate access rights to the Log Database on the SQL Server and/or the Windows directory service. (Some environments require this to be entered as domain\user name. For example: Websense\jdoe.)
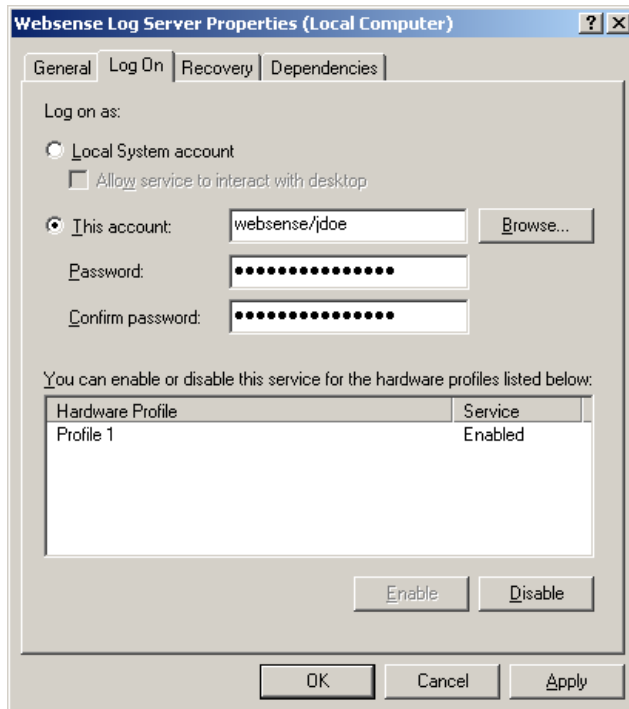
6. Enter and confirm the Windows password for this account.

7. Click **OK** to close the Service dialog box.

8. Select the Websense Log Server entry in the Services list, and then click the **Start** button.
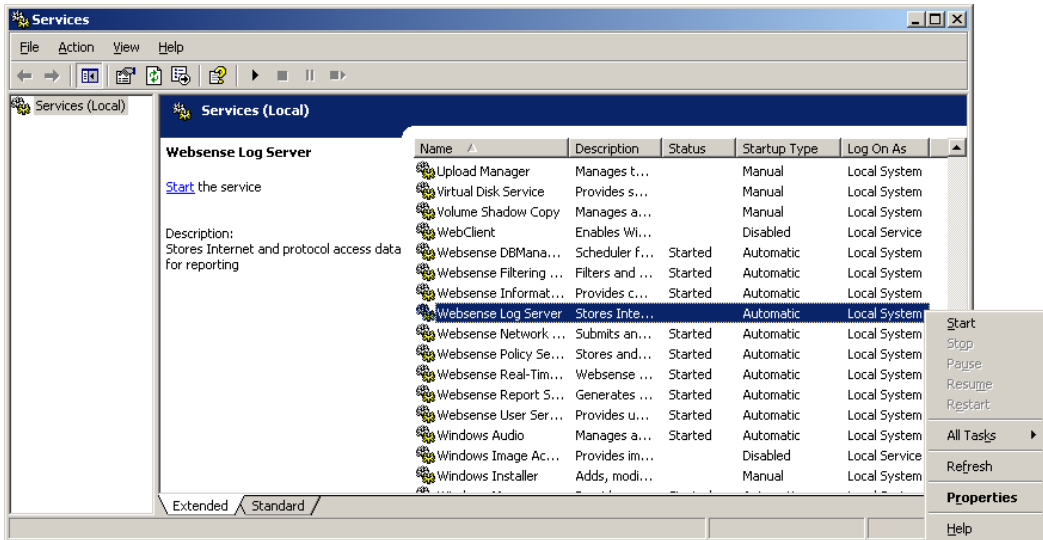
Reporter Scheduler Service Setup

Scheduling Reports to run is done via the Reporter window. However, when Reporter is installed to use a trusted connection for database communications, you will need to set up the Scheduler service with a user name and password.
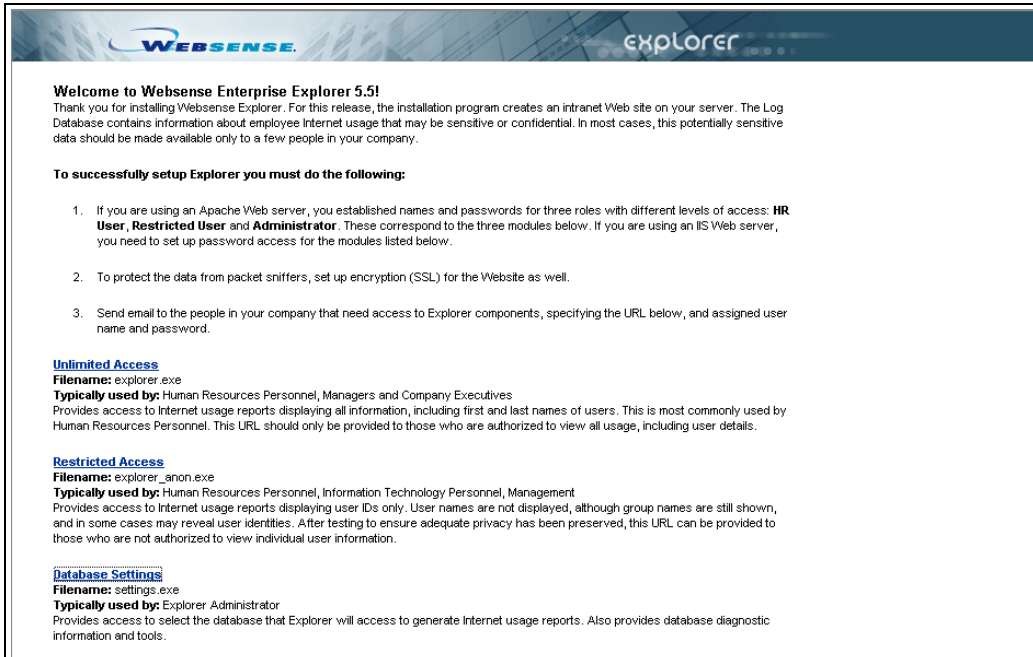
Scheduler must authenticate to the Log Database.

Set up Scheduler with the appropriate authentication information as follows:

1. Open the Windows Control Panel:

2. Select the `Websense Report Scheduler` service in the list, and then click **Stop**.

3. Double-click the Websense Report Scheduler service to open the Properties dialog box.

4. On the Log On tab (or the Log On As area for Windows NT), select the **This account** option.

5. In the text box, enter the user name for an account with appropriate access rights to the Log Database on the SQL Server and/or the Windows directory service. (Some environments require this to be entered as domain\user name. For example: Websense\jdoe.)

6. Enter and confirm the Windows password for this account.

7. Click **OK** to close the Service dialog box.

8. Select the Websense Report Scheduler entry in the Services list, and then click the **Start** button.

Log Database Manager Service Setup

When Log Database Manager is installed to use a trusted connection for database communications, you will need to set up the DBManager Scheduler service with a user name and password, as the Scheduler must authenticate to the Log Database.

These are the steps to configure the Websense DBManager Scheduler service to support the trusted connection after installing the Log Database Manager.

1. Open the Windows Control Panel:

2. Select the Websense DB Manager Scheduler service in the list, and right-click; then click **Stop**.

3. Double-click the `Websense DB Manager Scheduler` service to open the Properties dialog box.

4. On the Log On tab, select the **This account** option.

5. In the text box, enter the user name for an account with appropriate access rights to the Log Database on the SQL Server and/or the Windows directory service. (Some environments require this to be entered as domain\user name. For example: Websense\jdoe.)

6. Enter and confirm the Windows password for this account.

7. Click **OK** to close the Service dialog box.

8. Select the Websense DB Manager Scheduler entry in the Services list again, and right-click; then click the **Start** button.

Explorer settings page

If you have chosen to install Explorer using a trusted connection, after installation you can run reports as that user, subject to the security restrictions placed on that executable.

If you want to run Explorer reports on a different Log Database, you make that change at the Explorer settings page. Access the settings page from the Administration page.

1. Click the **Database Settings** link.

2. If no user name is passed, Explorer assumes it is a trusted connection
   Leave the user name and password blank to connect as trusted connection
3. Click the **Select Database** button.

CHAPTER 7 | Upgrading and Migrating

- ◆ Upgrading
- ◆ Migrating the Log Database
- ◆ Upgrading from MSDE to Microsoft SQL Server

Upgrading

These upgrades are supported to version 5.5:

Component	Version
Explorer	5.0.1, 5.1, 5.2
Reporter	5.x
Log Server	5.x
Log Database Manager	5.1, 5.2

i **IMPORTANT**

When upgrading from v5.1, the installer will uninstall and re-install Explorer 5.1 and Log Database Manager 5.1. Follow the onscreen messages.

During the installation, you may receive an error message about Log Database Manager. Click OK to bypass the message and continue with the installation.

Migrating the Log Database

The migrate utility updates a 6.3 or 5.x Log Database to the version 5.5 format.

> **NOTE**
> When the Migrate Utility migrates Websense Reporter 6.3 log data, it recategorizes Internet access requests to fit the current Master Database category structure (see *Appendix D: Category List*).

The Migrate Utility resides on the Log Server machine. It converts log information from Websense Reporter 6.3.x (`wslogdb.mdf`) or 5.x (`wslogdb50.mdf`), into a format compatible with Websense Enterprise Reporter 5.5. Once the information has been migrated, Websense Enterprise Reporter and Explorer 5.5 can use it to generate reports.

> **NOTE**
> Do not attempt to log to a migrated database. The migrated database should only be used for reporting purposes.

Migrating from Reporter 6.3 or 5.x

To convert a Websense Reporter 6.3 Log Database into a Websense Enterprise Reporting 5.5 compatible format, use the following procedure.

> **NOTE**
> Please be aware that, although Group information is carried forward from a 6.3 database, Reporting 5.5 cannot update the information based on changes in the directory service, because Log Server cannot resolve the domain/context information.

1. Back up the existing Log Database. See the SQL Server or MSDE documentation for assistance.

2. Disable consolidation on the **Consolidation** tab in the Log Server Configuration window, if it is enabled.

3. Select Start > Programs > Websense Enterprise Reporter > Migrate Utility to open the Websense - Migrate window.
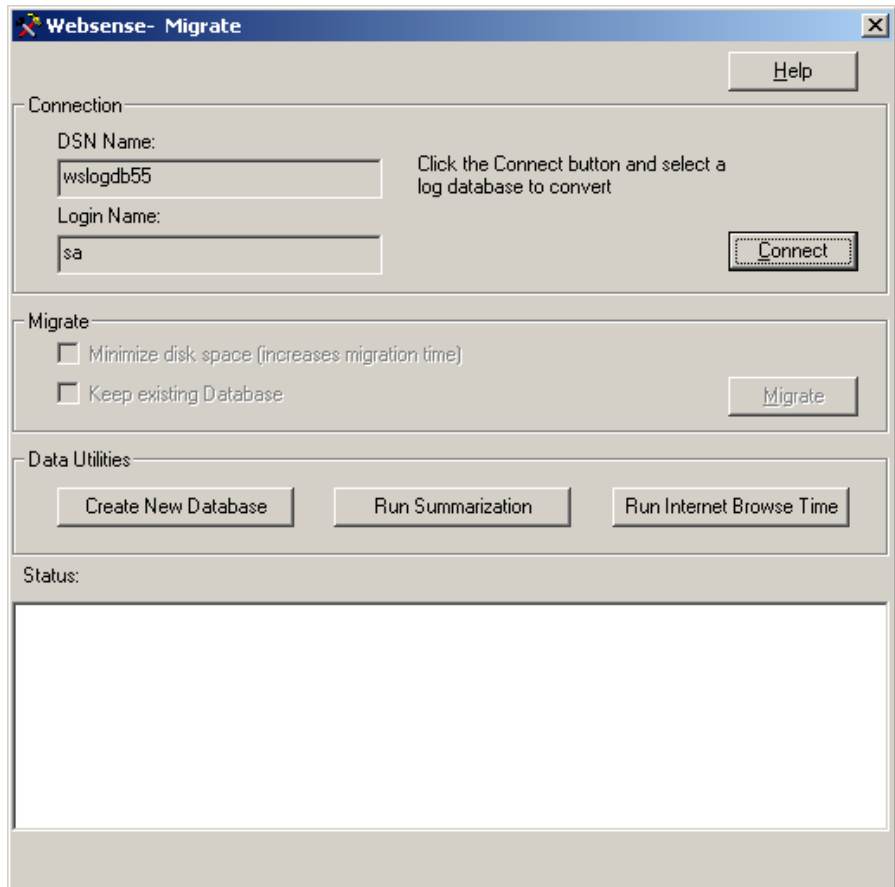
4. Click the **Connect** button. The Select Data Source dialog box appears.
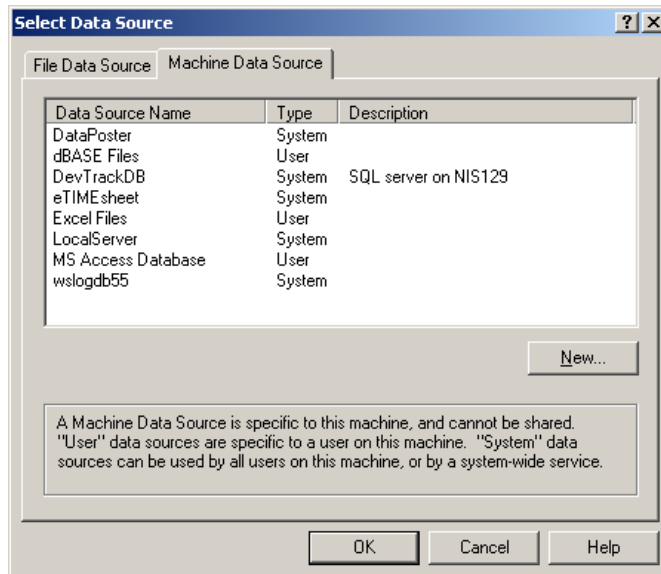
5. Click the **Machine Data Source** tab, and then select the **Data Source Name** (ODBC connection) for the Log Database you want to migrate. In most cases, the Data Source Name matches the name of the Log Database.

6. Click **OK**. A SQL Server Login dialog box appears.

7. If the Use Trusted Connection option is available, make sure it is set properly for your environment.

   MSDE users: Uncheck the option.

   SQL Server users: Contact your Database Administrator for assistance.

8. Enter the **Login ID** and **Password** established when the database was created. Usually this is the same login ID and password entered during Log Server installation.

   If you are not using a trusted connection for database communications, but the Use Trusted Connection option is checked, please uncheck it and enter the appropriate **Login ID** and **Password**.

> ✔ **NOTE**
> If you installed the copy of MSDE from the link provided during the Reporter installation, you may want to enter "sa" as your Login ID, and leave the Password field blank.

9. Consider whether the following options are appropriate for your environment.

   By default (neither option checked), the Migrate Utility maintains both the old and new databases during the migration, and then deletes the old database. This can require significant amount of disk space during migration.

   Check one of the following options if preferred. (You cannot choose both.)

   — **Minimize disk space** – copies a group of records from the old database to the new database, then deletes those records from the database. The process repeats until all records have been copied to the new database, and the old database has been deleted. This setting shrinks the old database as the new database grows, thereby requiring less disk space for the migration. However, the migration may take longer.

   — **Keep existing Database** – keeps the old database intact after it has been migrated. If you choose this option, the old database will retain its name, and the new database will have _55 appended to the name.

10. Click the **Migrate** button.

11. (*SQL Server users only*) Enter a location for the new database in the dialog box that asks for **Database Path**. This must be a complete path, starting with a local drive letter, and the path must already exist on the SQL Server machine. It cannot be a Network drive.

12. View the messages that appear in the **Status** area as the Migrate Utility converts the existing log information into a format compatible with Reporter 5.5, and stores the information in a new database.

   The new database name will include the old database name and the date and time of migration (`wslogdb_55may0820020937`).

13. **Run Trend** – runs trend queries on the newly migrated database. Due to changes in database structure, you may not be able to run Risk Trend reports.

14. When you finish working in the **Migrate** window, click the x button in the upper right corner to close the window.

Upgrading from MSDE to Microsoft SQL Server

Microsoft Data Engine (MSDE) users can upgrade to Microsoft SQL Server version 7.0 or SQL Server 2000 at any time, to take advantage of the larger memory capacity in SQL Server. The recommended approach is to install SQL Server on the MSDE machine, as described below. If you choose to install SQL Server on a different machine than MSDE, please see the Websense support Knowledge Base at:

www.websense.com/support/knowledgebase

Be sure to perform the upgrade during a quiet period, because no Internet access information is logged during this process.

✔ **NOTE**

If upgrading to a foreign language version of Microsoft SQL Server, you will need to uninstall the English version of MSDE before installing Microsoft SQL Server.

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1. On the Log Server machine, stop the Log Server.

   a. Select **Start > Programs > Websense Enterprise Reporter > Log Server**.

   b. Select the **Connection** tab.

   c. In the Log Server Service area, click **Stop**.

2. Go to the MSDE machine, and install SQL Server (see SQL Server documentation).

3. Go to the Log Server machine, and open the **Log Server Configuration** window if necessary.

4. Open the **Database** tab, and select the **MS SQL Server** option.

5. Click the **Connection** button to select the Log Database.

6. Update the **Maximum connections allowed** according to your SQL Server license (contact the Database Administrator for assistance).

7. Click **Apply**.

8. If the SQL Server service is not running, start it at this time.

9. Open the **Connection** tab, and then click the **Start** button to restart the Log Server.

Removing Reporting Components

If you would like to uninstall some or all of the Websense Enterprise Reporting components, remove them from your machine as described in the steps below.

1. Locate the `setup.exe` file that was unzipped with the Websense Enterprise Reporting package.

   Alternatively, you can download Websense Setup from the Websense Web site or or launch it from the Websense Installation CD. In that case, choose Remove some components.

2. Follow the instructions to Modify, Repair or Remove modules or components.

3. Select Modify to remove selected components, and Remove to uninstall all components. Click **Next**.

4. Follow the instructions on the screen to modify or remove Reporting components.

✔ **NOTE**

If Reporting components exist on more than one machine, run the uninstall program on each machine.

The **Remove** option will remove all Reporting components.

The **Repair** option will reinstall Reporter components currently running on the machine, except for the Log Database.

The **Modify** option mentioned in the steps above will allow you to select specific Reporter components to install or delete. The Modify option *adds* checked components that did not previously exist on the machine. It *removes* unchecked components if they exist on the machine

> **NOTE**
>
> Be careful as you select components. Modify *removes*
> unchecked components if they exist on the machine.