

ENVIRONMENT MANAGER

Installing Personalization Server with Limited Database Privilege

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Overview

AppSense Personalization Server uses a SQL Server database to store personalization data. The installation procedure requires sysadmin access to the SQL Server instance in order to create and initialize the Personalization Database.

Use this document for situations where the Personalization Server installer does not have sysadmin access. This document describes the procedure for exporting scripts to send to the Database Administrator to execute with full privilege.

Note It is assumed that the SQL Server instance is on a separate machine to the Personalization Server.

Personalization Server Requirements

The Personalization Server installer must have administrative privilege to the machine on which the Personalization Server itself is being installed. In addition, two SQL Servers logins are required:

- § The profile configuration account for the installation utility.
- § The profile service account for normal database access to save personalization data and maintain the system.

The Personalization Server requires two SQL Agent jobs to be created to do daily and demand archiving. Whilst the Database Administrator must set these jobs up, they run in the context of the service account and need no special privilege after installation.

The installation procedure is detailed in the following sections. Screenshots and descriptions are based on SQL Server 2005. For installation on SQL Server 2000, Enterprise Manager and Query Analyzer are used rather than Management Studio for maintenance and running queries. This is not discussed further.

Installation Procedure

Initial Personalization Server Installation

The first or only Personalization Server is installed in the normal way, using the Management Suite installer, and by specifying a remote SQL instance.

Exporting Scripts

1. At the end of the Personalization Server installation, click the **Launch Personalization Server Configuration** button. The Server Configuration Utility (SCU) is displayed.
2. Click the **Skip Wizard** button in the bottom left hand corner. A message is displayed to confirm you want to skip the wizard. Click **Yes**.
3. After a short while the **Connect to Database** dialog box is displayed. Click the **Cancel** button. The main page of the SCU is displayed with a variance report showing variances from the default configuration. These variances can be ignored for the time being.
4. Select the **Database** node in the left pane.
5. Click the **Actions** menu button in the right pane and select **Export Scripts** on the menu. The **Export Scripts Wizard** is displayed.
6. Select **I want to create a new database** and click **Next**.
7. Select the **Create Database** and **Create Schema** scripts to export and click **Next**.
8. Specify a convenient location to save the files and click the **Save** button.
9. Click the **Finish** button to return to the main SCU page.
10. Click the **Actions** menu button and select **Export Scripts**.
11. Select **I want to perform maintenance tasks** and click **Next**.
12. Select the **Set up daily archive job** and **Setup demand archive job** scripts to export and click **Next**.
13. Specify a convenient location to save the files and click the **Save** button.
14. Click the **Finish** button to return to the main SCU page and close the page.

Editing the Scripts

Three out of the four scripts must be edited before use. You need to know:

- § The name of the Personalization Database to be created (usually 'PersonalizationServer').

§ The name of the service account login.

Modify the scripts (using a convenient text editor) as follows:

Create Database.sql	Modify the line <code>SET @DatabaseName = ''</code> (line 6) to contain the database name required, for example, <code>SET @DatabaseName='PersonalizationServer'</code>
Create Schema.sql	No edits are required.
Set up daily archive job.sql	Modify the value 'ProfileUser' to the value of the service account login. If this is a Windows login (rather than a SQL login) the value will be in the form 'Domain\User', for example, 'AppSense\PUser'. This may be found on line 43.
Set up demand archive job.sql	As above, modify 'ProfileUser' to the service account. This is on line 41 in this case.

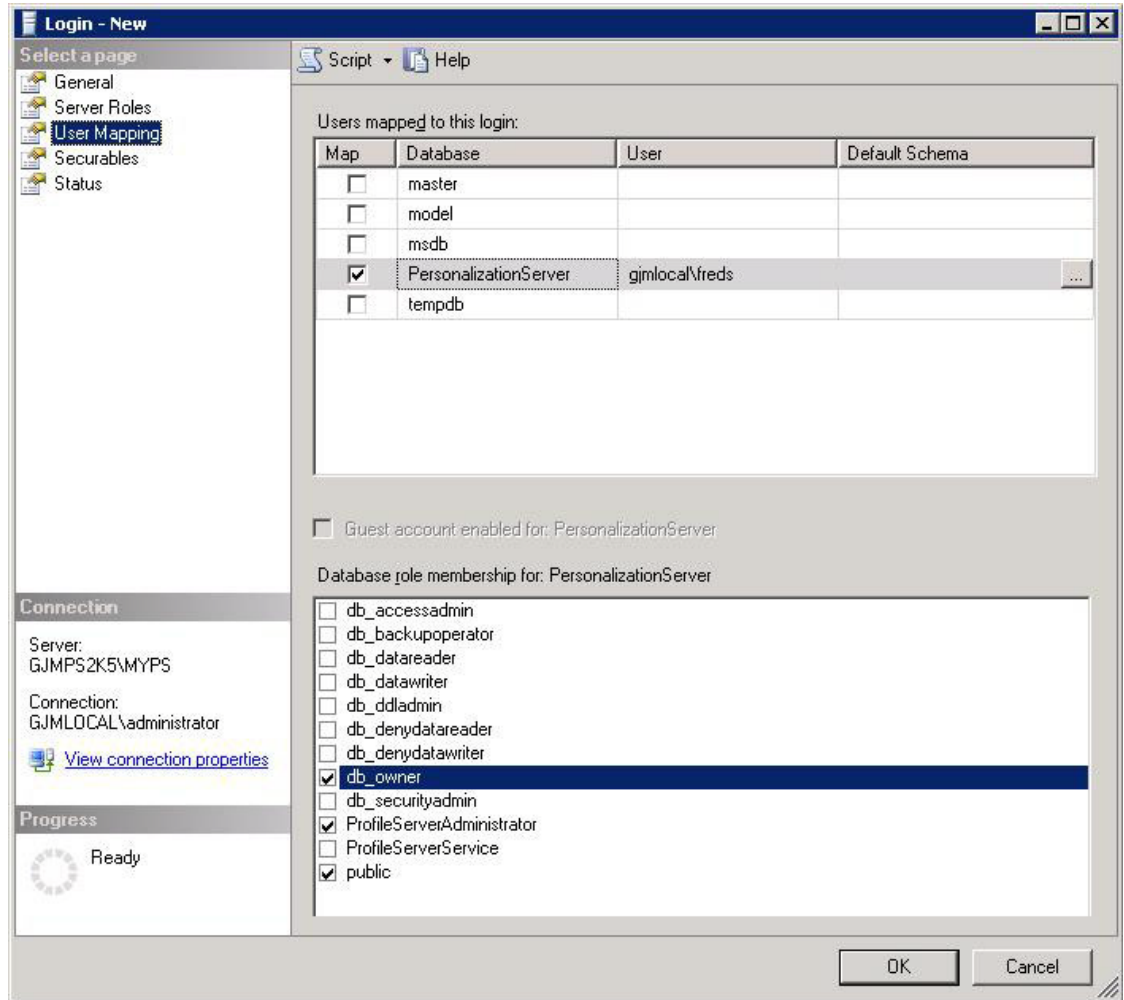
Apply the Scripts to the Database

The following steps must be carried out by the Database Administrator under sysadmin privilege. The scripts exported and edited in the previous steps are used.

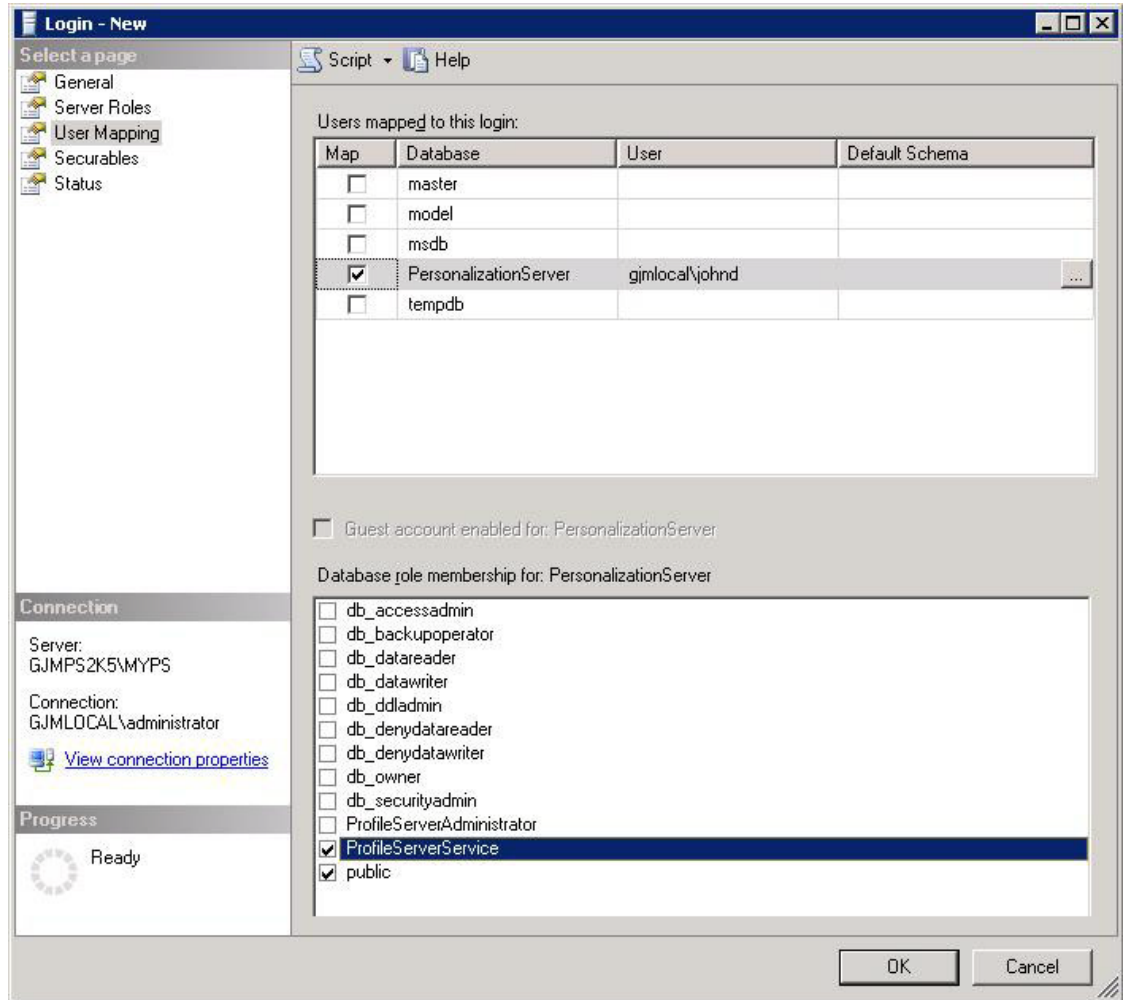
1. Create the database. Using Management Studio, load the 'Create Database.sql' script prepared earlier and run it to create the Personalization Database.

Note It is important to use this script and not to create a default database, as this script creates a second file group specifically for archiving.

2. Create the tables in the database. Select the new database as the current database in Management Studio and run the 'Create Schema.sql' script. Some warnings will be displayed about maximum key length and renaming objects. These may safely be ignored.
3. Add the configuration account login using Management Studio. Right-click the **Security/Logins** node in the left pane and select **New Login**. The Personalization Server can use either Windows accounts or SQL accounts as required. This account needs no special server role, but needs to be a member of the 'db_owner' and 'ProfileServerAdministrator' roles (but not the 'ProfileServerService' role). This is shown below:



4. Similarly, add the service account login. This only needs to be a member of the 'ProfileServerService' role in the Personalization Database.



- The daily archiving SQL Agent job runs at 2AM daily to archive all profiles that have changed on the previous day (and clean up orphaned profiles and out-of-date usage statistics). This is created by the 'Set up daily archiving.sql' script. Set the current database to be the Personalization Database in Management Studio and execute the script.
- After the execution the script may be started manually from Management Studio to check that it works. Also, the schedule may be modified according to archiving requirements using the normal Management Studio features.

Note The demand archiving job is provided as a convenience if archiving is required other than on the normal schedule. It is intended to be run manually from Management Studio and, as such, may be omitted if desired.

- To create the job, ensure the current database is the Personalization Database in Management Studio and run the 'Set up demand archiving.sql' script.

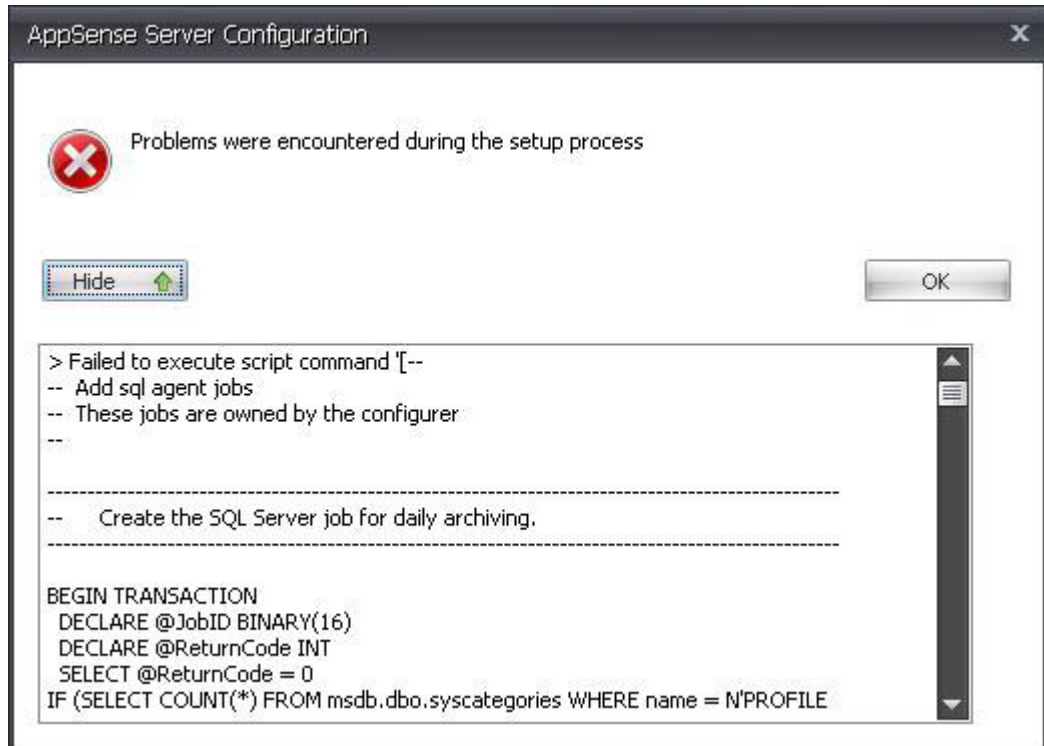
This procedure concludes the steps that require sysadmin privilege. Further installation is done by the Personalization Server installer.

Run the SCU to Complete Setup

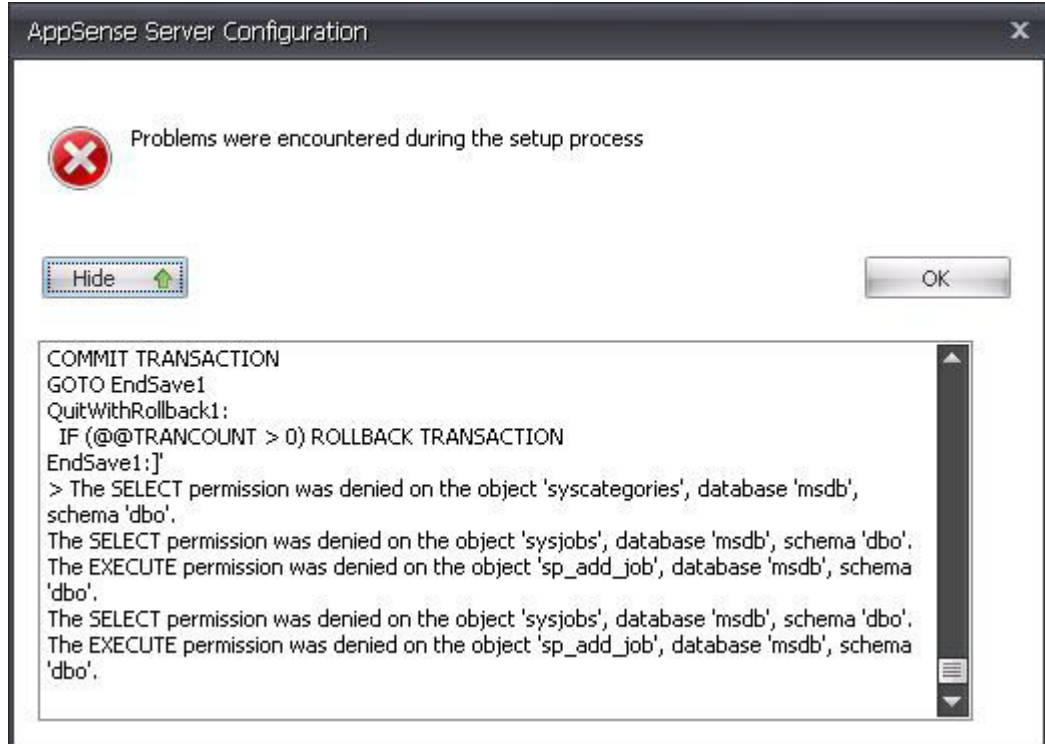
Once the database is set up, the configuration is completed on the Personalization Server.

1. Launch the SCU from **Start > All Programs > AppSense > Environment Manager > AppSense Personalization Server Configuration**. The **Connect to Database** dialog box is displayed. Click the **Cancel** button. The main SCU page is displayed.
2. Click the **Run Wizard** button in the right-pane and continue to set up the server as normal, using the configuration and service database accounts added in the previous section.

Note Because the configuration account does not have sysadmin permission, an error will be displayed when the SCU attempts to set up the SQL Agent jobs. The error should look like the following:



3. Ensure that this is the correct error. Scroll down to the bottom of the text and check the end of the message. The end should look as follows:



Provided the error looks as above, it may be ignored and the Personalization Server has been successfully installed. Note that, because of the privilege problem, the SCU will continue to show a couple of database variances.

Note The SCU will show a variance indicating that the database login is not enabled. Do not attempt to repair this variance. This would have the effect of removing the service account role from the login, which will prevent personalization and the console working.

Adding Extra Personalization Servers

Installation of extra Personalization Servers connected to the same database can proceed as normal. In each case the SCU will display the error message above regarding the SQL Agent job. This can be safely ignored.

Upgrades

Upgrades work as expected. The SCU can upgrade the database but will display the same error message as above when it attempts to recreate SQL Agent jobs. This can be ignored. The process upgrades the database correctly. Care should be taken to check that no other error messages are generated.