

Quest® MessageStats® 7.8
Upgrade Guide



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Legend

-  **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

-  **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

-  **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

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Upgrading MessageStats Overview

- [MessageStats upgrade paths](#)
- [About task migration](#)
- [How the task migration tool works](#)

MessageStats upgrade paths

MessageStats 7.8 supports an in-place upgrade from 7.4 or later. If you have an earlier version (6.5.1 to 7.3) of MessageStats, you must first upgrade to 7.4.1 and then upgrade 7.4.1 to 7.8.

After you have upgraded to 7.4.1, you can perform an in-place upgrade to MessageStats 7.8.

About task migration

When upgrading MessageStats, you are prompted to initiate task migration.

Depending on how your MessageStats Scheduler Service is configured and on the number of existing tasks that you have to migrate, task migration can take several hours. If you choose to cancel task migration during the installation process, you can run it separately at a later time.

You cannot use the upgraded MessageStats release until the existing tasks have been migrated.

To run the task migration tool separately

- On a computer on which the MessageStats console is installed, navigate to C:\Program Files (x86)\Quest\MessageStats and run the MigrateTasks.exe tool.
The task migration progress is displayed while the task files are being migrated.

How the task migration tool works

When you run the MigrateTasks.exe tool, it performs the following tasks:

- 1 Connects to the Quest MessageStats Scheduler Service to determine the database location.
- 2 Verifies that no tasks are currently running.

If the scheduler service is running tasks, the tool waits for one minute and tries again. If the scheduler service is running tasks continually for 60 minutes, the task migration tool fails to run.

- 3 Stops and disables the MessageStats Scheduler Service.
- 4 Connects to task storage and task instance storage.
- 5 Migrates the tasks and the task instances to the database.
- 6 Archives the tasks and task instances in a compressed file named as follows:
tasksarchiveYYYYMMDDHHMMSS.zip

By default, the file is located in the following path C:/Program Files (x86)/Quest/MessageStats/tasks.

- 7 Deletes the processed task instance files from the MessageStats tasks folder.
- 8 Enables and restarts the MessageStats Scheduler Service.

Troubleshooting task migration

The following error conditions might be reported during task migration:

Table 1. Troubleshooting the task migration tool.

Error Message	What It Means
Problem migrating task	These errors can appear if you deleted any task files in the MessageStats tasks folder. The task migration continues but the status of occurrences related to the missing task documents will be inaccurate.
Problem migrating task instance	
Problem updating occurrence status of task instance	
Problem migrating property X of task	These errors can appear if there are errors in the task documents, or if there were errors during database installation. Task migration is not performed for the problematic information, but will otherwise continue.
Problem migrating property x of task instance	
Problem updating status of task instance	
Problem updating progress of task instance	

If task migration is stopped unexpectedly, the Quest MessageStats Scheduler Service might be left in a disabled state. In this situation, you must enable the scheduler service before you can restart task migration.

Typical MessageStats Upgrade Scenarios

- [About SQL Security Permissions for Upgrading the Database](#)
- [Upgrading a Complete \(Single Server\) MessageStats Installation](#)
- [Upgrading a Distributed Installation with a Separate Database Server](#)
 - [1a. Upgrading the MessageStats Database on a Separate Server](#)
 - [1b. Manually Upgrading the MessageStats Database on a Separate Server](#)
 - [2. Upgrading the MessageStats Reports and the MessageStats Server](#)

About SQL Security Permissions for Upgrading the Database

Generally, it is recommended that you upgrade MessageStats using the MessageStats service account. In most cases, if the account used to upgrade the MessageStats database is the database owner, you can upgrade the database without any issues.

However, for environments in which security is locked down in the SQL deployment, use the following information to determine which SQL security role assignments are required by the account used to upgrade the database:

Table 1. Determining the required SQL security roles.

Is the account the database owner?	Required SQL security role assignments
Yes	<ul style="list-style-type: none"> • dbcreator • public • securityadmin
	The account must be a member of MessageStats Admin local user group.
No	<ul style="list-style-type: none"> • dbcreator • public • securityadmin • sysadmin
	The account must be a member of MessageStats Admin local user group.

Upgrading a Complete (Single Server) MessageStats Installation

The simplest type of upgrade is for a complete installation where all the MessageStats components are installed on a single computer.

Prerequisite

Before you start the upgrade process, ensure that you are logged onto the MessageStats server with the MessageStats service account.

Download and Extract MessageStats

- 1 Download the latest version of MessageStats from the Support web site.
- 2 Extract the contents of the compressed file to a directory on your existing MessageStats server.
- 3 In the extracted MessageStats directory, double-click the **autorun.exe** file.

Verify the Upgrade Options

- 4 Select the **Install** tab, click the **MessageStats** link, and run the installer.
A dialog appears indicating that an earlier version of MessageStats exists in this computer.
- 5 Click **Continue**.
- 6 Click **Next**, accept the license agreement and click **Next**.
- 7 Select **Complete**.
- 8 Verify the server locations for the installed components:
 - the MessageStats database SQL server
 - the MessageStats reports IIS server
 - the server on which the MessageStats scheduler service is installed.
- 9 Click **Next**.
- 10 Ensure that the **Share the Application Log folder** option is selected and click **Next**.
- 11 Select the web site option that reflects your MessageStats reports installation and click **Next**.
- 12 Verify the SMTP server and SMTP from address settings for your report subscriptions and click **Next**.
- 13 Enter the MessageStats service account name (in domain\username format) and password.
- 14 Click **Install**.
The MessageStats Database Setup Wizard is displayed.

Migrate the Database

- 15 Click **Next**.
- 16 Verify the SQL server name and MessageStats database name. Ensure that the **Migrate previous build** check box is selected.
A summary of the selected database options are displayed.

17 Click **Start**.

The Installation Results screen shows whether database migration was successful.

18 Verify that the database was successfully migrated and click **Done**.

If a database upgrade and migration is not successful, MessageStats automatically reverts to the previous version of the database. The MessageStats database and the MessageStats product must be the same version to work properly.

Migrate Existing Tasks

Once the reports and MessageStats server components are installed, you are prompted to perform task migration.

i | **IMPORTANT:** Do not run task migration if database installation was not successful.

If you cancel task migration during the installation process, you can run it separately at a later time. For information about running task migration manually, see [About task migration](#) on page 4.

19 Click **Next**.

20 After the tasks have been migrated, click **Finish**.

Upgrading a Distributed Installation with a Separate Database Server

When you upgrade a distributed MessageStats installation in which the components are installed on different computers, you must upgrade the components in the following order:

- 1 MessageStats database
- 2 MessageStats reports
- 3 MessageStats server (includes the MessageStats scheduler service)

In the following sample procedures, the MessageStats database is installed on one server. The MessageStats reports and the MessageStats server (scheduler service, task processors, and console) are installed together on a second server.

In most installations, you use the MessageStats installer to perform the upgrades. The process consists of the following procedures:

- 1a. [Upgrading the MessageStats Database on a Separate Server](#)
2. [Upgrading the MessageStats Reports and the MessageStats Server](#)

However in some situations, you might have to manually upgrade the database but still use the installer to upgrade the reports and server (scheduler service). The process consists of the following procedures:

- 1b. [Manually Upgrading the MessageStats Database on a Separate Server](#)
2. [Upgrading the MessageStats Reports and the MessageStats Server](#)

i | **IMPORTANT:** The database must have the same MessageStats version and build number as the MessageStats Server you are using.

1a. Upgrading the MessageStats Database on a Separate Server

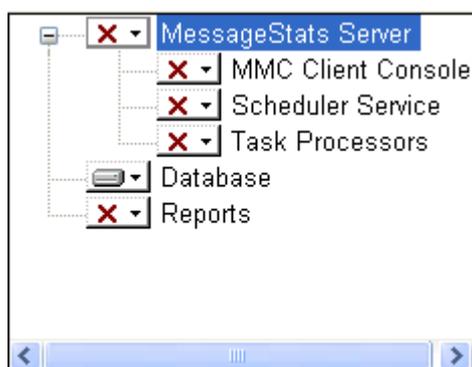
First you must upgrade the MessageStats database by running the MessageStats installer. It is recommended that you log on with the MessageStats service account to perform the upgrade.

To upgrade the MessageStats Database

- 1 Download the latest version of MessageStats from the Support web site.
- 2 Extract the contents of the compressed file to a directory on your existing MessageStats database server.
- 3 In the extracted MessageStats directory, double-click the **autorun.exe** file.
- 4 Select the **Install** button under Quest MessageStats.

A dialog appears indicating that an earlier version of MessageStats exists in this computer.

- 5 Click **Continue**.
- 6 Click **Next**, accept the license agreement and click **Next**.
- 7 Select **Custom**.



The installer automatically detects the database component that is installed. A red x is displayed beside the MessageStats Server and Reports nodes in the Select Features dialog, indicating that they are not present and will not be upgraded.

- 8 Click **Next**.
- 9 Verify the server location for the installed MessageStats database server. Enter the SQL instance name after the SQL server name (SQLServer/InstanceName).

You must explicitly specify the SQL instance if

- you are not using the default SQL instance
- you have more than one SQL instance
- you are using SQL Express (*MyServer/SQLEXPRESS*)

- 10 Click **Next**.
 - 11 Verify that the displayed account is the MessageStats service account and click **Install**.
- The MessageStats Database Setup Wizard Welcome page is displayed.

- 12 Click **Next**.
- The existing SQL Server and MessageStats database information is displayed.

- 13 Ensure that the **Migrate Previous Build** check box is selected and click **Next**.

- 14 Verify the summary of selected options and click **Start**.
- 15 When the database migration is completed, verify that the installation results show that the database creation and migration was successful.

If a database upgrade and migration is not successful, MessageStats automatically reverts to the previous version of the database. The MessageStats database and the MessageStats product must be the same version to work properly.
- 16 Click **Done** and click **Finish**.
- 17 Upgrade the MessageStats reports and server (scheduler service). For details, see [2. Upgrading the MessageStats Reports and the MessageStats Server](#) on page 11.

1b. Manually Upgrading the MessageStats Database on a Separate Server

In some situations, you might need to manually upgrade the MessageStats database using a script instead of using the MessageStats installer.

To migrate the MessageStats database manually, you use a SQL script called MessageStatsMigration.sql that is located in the MessageStats installation directory in a folder named SQL.

To manually migrate the MessageStats database

- 1 Copy the MessageStatsMigration.sql file to the SQL server on which the MessageStats database resides.
- 2 Open SQL Server Management Studio.
- 3 Connect to the SQL Server that is hosting the MessageStats Database.

`Server Type = Database Engine`
`Server Name = SQL Server Name`

`Authentication = Windows Authentication or SQL Server Authentication`

SQL Authentication is recommended for installations in which the reports and database are on separate servers.
- 4 Expand **SQL Server Name** and expand **Databases**.
- 5 Right-click the **MessageStats** database and select **New Query**.
- 6 On the Query window, select **File | Open | File**.
- 7 Locate the MessageStatsMigration.sql script file and open it.
- 8 Provide either the Windows Authentication or SQL Server Authentication and click **Connect**.
- 9 Select the **Query Menu** and **Execute**. Select the **MessageStats Database**.

This migrates the tables and roles as required.
- 10 Go to the Security\Logins folder in SQL Management Studio.
- 11 Confirm that the MessageStats Admin login has the following roles for database access:
 - public
 - db_ddladmin
 - db_securityadmin
 - MessageStats_Admin
- 12 Confirm that the MessageStats Web login has the following roles for database access:
 - public

- MessageStats_Web
- 13 Close SQL Management Studio.
 - 14 Upgrade the MessageStats reports and server (scheduler service). For details, see [2. Upgrading the MessageStats Reports and the MessageStats Server](#) on page 11.
 - 15 Confirm that the MessageStats console can connect by opening and confirming all settings.

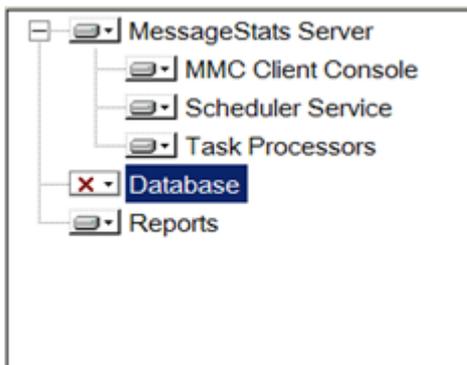
2. Upgrading the MessageStats Reports and the MessageStats Server

Next you must upgrade the MessageStats reports and the MessageStats server (console, scheduler service, and task processors) using the MessageStats installer.

It is recommended that you log on with the MessageStats service account to perform the upgrade.

To upgrade MessageStats Reports and MessageStats server

- 1 Copy the zipped file that contains the MessageStats release to the server that hosts the MessageStats reports and the MessageStats server.
- 2 Extract the contents of the compressed file to a directory on the server.
- 3 In the extracted MessageStats directory, double-click the **autorun.exe** file.
- 4 Select the **Install** tab and click the **MessageStats** link.
A dialog appears indicating that an earlier version of MessageStats exists in this computer.
- 5 Click **Continue**.
- 6 Click **Next**, accept the license agreement and click **Next**.
- 7 Select **Custom**.



The installer automatically detects that the MessageStats server and the MessageStats reports components are installed. A red x is displayed beside the MessageStats Database node in the Select Features dialog, indicating that the database is not present.

- a If you manually updated the MessageStats database using a script, set the MessageStats Database to **Entire feature will be unavailable**.
- 8 Click **Next**.
- 9 Verify the server locations for the installed MessageStats database, reports, and scheduler service.
The current server is displayed by default for all the component locations.
- 10 Enter the SQL Server on which the MessageStats database is installed. Enter the SQL instance name after the SQL server name (SQLServer/InstanceName).

You must explicitly specify the SQL instance if

- you are not using the default SQL instance
- you have more than one SQL instance
- you are using SQL Express (*MyServer/SQLEXPRESS*)

11 Click **Next**.

12 Ensure that the **Share the Application Log folder** option is selected and click **Next**.

13 Select the web site option that reflects your MessageStats reports installation and click **Next**.

14 Verify the SMTP server and SMTP from address settings for your report subscriptions and click **Next**.

15 Enter the MessageStats service account name (in domain\username format) and password.

16 Click **Install**.

Once the reports and MessageStats server components are installed, you are prompted to perform task migration.

i | **IMPORTANT:** Do not run task migration if database installation was not successful.

Task migration can take a while to run. If you cancel task migration during the installation process, you can run it separately at a later time. For information about running task migration manually, see [About task migration](#) on page 4.

17 Click **Next** to run the Migrate.exe tool which migrates your existing tasks.

18 Click **Finish**.

Moving the MessageStats Database

- [Process to Move an Existing MessageStats Database](#)
- [Backing Up the MessageStats Database](#)
- [Restoring the MessageStats Database on the Destination Server](#)
- [Setting Security on the New SQL Server](#)
- [Detaching the Database](#)
- [Moving the Database Files and Reattaching the Database](#)
- [Updating Connections to the New Server](#)
- [Upgrading MessageStats After the Database is Moved](#)

Process to Move an Existing MessageStats Database

The process of moving the MessageStats database to a different SQL server consists of the following steps:

- 1 [Backing Up the MessageStats Database.](#)
- 2 [Restoring the MessageStats Database on the Destination Server.](#)
- 3 [Setting Security on the New SQL Server](#)
- 4 [Detaching the Database.](#)
- 5 [Moving the Database Files and Reattaching the Database.](#)
- 6 [Moving the Database Files and Reattaching the DatabaseUpdating Connections to the New Server.](#)

Backing Up the MessageStats Database

The first step is the back up your MessageStats database on the existing SQL server.

To back up the MessageStats database

- 1 Start SQL Server Management Studio on the source computer.
- 2 Expand the **Databases** node.
- 3 Right-click the **MessageStats** database and select **Tasks | Backup Database**.
- 4 Under the Destination section of the Backup Database window, click **Add**.
- 5 Enter a name for the MessageStats database backup file (such as MessageStatsDb.bak) in the File Name field.
- 6 Ensure the **Overwrite Media** option is set.

This option is located in the Overwrite section of the Backup Database window.

- 7 Click **OK** from the Backup Database window.

Restoring the MessageStats Database on the Destination Server

Next, you must restore the MessageStats database on the new SQL server.

To restore the MessageStats database

- 1 Start SQL Server Management Studio on the destination SQL server.
- 2 Right-click the **Databases** node and select **Tasks | Restore Database**.
- 3 Enter MessageStats in the [Restore as database:] field on the Restore Database window.
- 4 Under the Restore section of the Backup Database window, select the **[From device]** option.
- 5 Click **Select Devices**.
- 6 Click **Add** and select the backup file that you created.
- 7 Click **OK** until the Restore Database window is displayed.
- 8 Click **OK** on the Restore Database window to restore the database.

Setting Security on the New SQL Server

Security groups are needed to assign rights to the MessageStats database on the new SQL server. You must create two groups, either local groups or global groups, named MessageStats Admin and MessageStats Web.

If the MessageStats database resides on a SQL cluster, create the groups in Active Directory.

To create the MessageStats groups

- 1 Add the MessageStats service account to the local Administrators group on the new SQL server.
- 2 Create two groups called MessageStats Admin and MessageStats Web.
 - The MessageStats Admin group is used for accounts that perform a gathering and administer the MessageStats console.
 - The MessageStats Web group is used for accounts that render the reports.
- 3 Add the MessageStats service account to the MessageStats Admin group.
- 4 Add Everyone to the MessageStats Web group.

To assign the MessageStats Admin group to the MessageStats database

- 1 Open SQL Server Management Studio and expand **Security | Logins**.
- 2 Right-click **Logins** and select **New Login**.
- 3 Click **Search** and find the **MessageStats Admin** group. Click **OK**.
- 4 Select **Windows Authentication**.

If the database and reports are on separate servers, SQL authentication is recommended. See [If SQL Authentication is Used](#) on page 15.

However, if Windows Authentication is required, you must set up Kerberos delegation from the MessageStats Reports server to the MessageStats Database server. For more information, see the section titled “Deploying a Distributed Installation Using Windows Authentication” in the *MessageStats Deployment Guide*.

- 5 For the Default Database, select **MessageStats** from the drop-down list.
- 6 In the left hand column, click **User Mapping**.
- 7 In the Users Mapped to this Login section, select check box beside the MessageStats database.
- 8 Under Database role memberships for, select the following roles for membership:
 - Public
 - MessageStats_Admin
 - db_securityadmin
 - db_ddladmin
- 9 Click **OK**.

To assign the MessageStats Web group to the MessageStats database

- 1 Open SQL Server Management Studio and expand **Security | Logins**.
- 2 Right-click **Logins** and select **New Login**.
- 3 Click **Search** and find the **MessageStats Web** group. Click **OK**.
- 4 Select **Windows Authentication**.

If the database and reports are on separate servers, SQL authentication is recommended. See [If SQL Authentication is Used](#) on page 15.

However, if Windows Authentication is required, you must set up Kerberos delegation from the MessageStats Reports server to the MessageStats Database server. For more information, see the section titled “Deploying a Distributed Installation Using Windows Authentication” in the *MessageStats Deployment Guide*.

- 5 For the Default Database, select **MessageStats** from the drop-down list.
- 6 In the left column, click **User Mapping**.
- 7 In the Users Mapped to this Login section, select check box beside the MessageStats database.
- 8 Under Database role memberships for, select the following roles for membership:
 - Public
 - MessageStats_Web.
- 9 Click **OK**.

If SQL Authentication is Used

If SQL authentication is being used, you must create a SQL account on the new SQL server and assign the appropriate database roles.

Assign the following database roles to the new SQL account:

- Public
- Messagestats_Web

Detaching the Database

You must also detach the database, in preparation for moving the database files to the new location.

To detach the database and move database files

- 1 Back up your data.
- 2 Open SQL Server Management Studio.

- 3 Right-click the **Databases** folder, select **MessageStats** and select **Properties**.
- 4 Select the **Files** tab.
- 5 Note the MessageStats data file and log file names. Scroll right to see the full file names, normally MessageStats.mdf and MessageStats.ldf.
- 6 Click **Cancel** to close the window.
- 7 Right-click the **MessageStats** database and select **Tasks | Detach Database**.
- 8 Click **Clear** if there are connections using this database.
- 9 Click **OK**.

The following prompt is displayed "Do you want to notify the currently connected users that their sessions in the database will be ended?"

- 10 Click **Yes**.

The STATUS in the Detach Database dialog box should say "The database is ready to detach".

- 11 Click **OK**.

The following prompt is displayed "Detaching database has completed successfully".

- 12 Click **OK**.

Moving the Database Files and Reattaching the Database

Now you must move the database data and transaction log files to a location on the new SQL server and reattach the database.

To move the database files

- 1 Navigate to SQL Server Data folder.
- 2 Move the data file and log file to the new SQL server location. As noted in the previous procedure, these files are normally named:
 - MessageStats.mdf
 - MessageStats.ldf

To reattach the database

- 1 In SQL Server Management Studio, right-click **Databases** and navigate to **Tasks | Attach Database**.
- 2 Click the browse (...) button.
- 3 Navigate to where the MessageStats.mdf and the MessageStats.ldf files now reside.
- 4 Select the **MessageStats.mdf** file and click **OK**.

The "Attach Database - [Servername]" dialog box displays the database information
- 5 Click **OK**.

A dialog box displays "Attaching database has completed successfully."
- 6 Click **OK** and exit SQL Server Management Studio.

Updating Connections to the New Server

Now you must edit the values that point to the old SQL server and update them to point to the new SQL server.

- To point the MessageStats Web Reports to the new SQL server, you must edit the QMSReports.udl file.
- To point the MessageStats server (which hosts the scheduler service) to the new SQL server, you must edit the MessageStats server properties in the console.

To update QMSReports.udl file

- 1 On the computer that hosts the MessageStats Reports, navigate to the MessageStats installation directory. By default, the installation directory path is C:\Program Files (x86)\Quest\MessageStats.
- 2 Double-click the **QMSReports.udl** file.
- 3 Select the **Connection** tab.
- 4 Select or enter the new server name (ServerName\Instance Name).
- 5 Click **Test Connection** to verify the connection to the new server.
- 6 Click **OK**.

To update the SQL server location in the MessageStats console

- 1 Open the MessageStats client console.
- 2 Right-click the MessageStats Server name in the treeview and select **Properties**.
The MessageStats server node is located directly under the MessageStats node in the tree.
- 3 Select the **Database** tab.
- 4 Click the browse (...) button for the **Locate the database on the following SQL server** option.
- 5 Select the new SQL server.
- 6 Click **Apply** and click **OK**.
- 7 Click the **Database Management** node and verify that the “Connected to” message displayed at the bottom right contains the correct SQL server name.

Upgrading MessageStats After the Database is Moved

If you are upgrading MessageStats after you have moved the database to a new SQL server, you must do the following:

- 1 Run the MessageStats installer on the new SQL server to upgrade the database version.
For information about upgrading the MessageStats database, see [Upgrading a Distributed Installation with a Separate Database Server](#) on page 8.
- 2 Run the MessageStats installer on the servers that host the MessageStats reports and MessageStats server (scheduler service, console, and task processors).
For more information about upgrading the reports and server, see [2. Upgrading the MessageStats Reports and the MessageStats Server](#) on page 11.

Moving and Upgrading MessageStats

- [About Moving a Complete MessageStats Installation](#)
- [Moving a MessageStats Installation with No Installed Report Packs](#)
- [Moving MessageStats with at least One Installed Report Pack — No Upgrade](#)
- [Moving and Upgrading MessageStats with at least One Installed Report Pack](#)

About Moving a Complete MessageStats Installation

This section describes moving a complete MessageStats installation to a new server. There are three possible scenarios covered:

- [Moving a MessageStats Installation with No Installed Report Packs](#)
- [Moving MessageStats with at least One Installed Report Pack — No Upgrade](#)
- [Moving and Upgrading MessageStats with at least One Installed Report Pack](#)

In the scenarios that follow, `Old_Server` is the server on which MessageStats is currently installed. `New_Server` is the server to which MessageStats is being moved.

When performing an upgrade, if you are going to upgrade the database manually using the SQL database migration script, run the script after you have removed MessageStats from the old server but before you install MessageStats on the new server. (If you are upgrading MessageStats in the normal manner using the installer, the database is migrated automatically.)

Moving a MessageStats Installation with No Installed Report Packs

Use the following procedure to move MessageStats in an installation where no report packs are installed. You can use this procedure whether you are upgrading MessageStats to a new version or not. (If you are upgrading, you install the new version of MessageStats on `New_Server`.)

- 1 Ensure there are no tasks running on `Old_Server`. Use the MessageStats console client to cancel any active tasks.
- 2 Remove MessageStats from `Old_Server`.
- 3 Copy the contents of the MessageStats program files folder to the new server.
The default location is `C:\Program Files (x86)\Quest\MessageStats`.
- 4 Install MessageStats on `New_Server` using the appropriate MessageStats service credentials.

- Ensure that the credentials have local administrative privileges on New_Server.
 - Ensure that the target folder for the installation matches the location to which you copied the program files folder from Old_Server.
- 5 If you installed MessageStats on New_Server without upgrading, install any MessageStats hotfixes to New_Server that were installed on Old_Server.
 - 6 If any tasks were specifically configured to run using Old_Server as the task execution server (tasks that do not use the default task execution server), configure these tasks to use New_Server.

Moving MessageStats with at least One Installed Report Pack — No Upgrade

Use this procedure when there is at least one report pack installed, but the versions of MessageStats and the report packs that are installed to the new server are the same as those on the old server. Neither MessageStats or the report packs are upgraded.

- 1 Ensure there are no tasks running on Old_Server. Use the MessageStats console client to cancel any active tasks.
- 2 Remove all MessageStats report packs from Old_Server.
- 3 Remove MessageStats from Old_Server.
- 4 Copy the contents of the MessageStats program files folder to the new server **except** for the Tasks folder. Do not copy the Tasks folder.

It is important that you do not copy the Tasks folder yet. You will copy this folder later.

The default location is C:\Program Files (x86)\Quest\MessageStats.

- 5 Install MessageStats on New_Server using the appropriate MessageStats service credentials.
 - Ensure that the credentials have local administrative privileges on New_Server.
 - Ensure that the target folder for the installation matches the location to which you copied the program files folder from Old_Server.
- 6 Install all the MessageStats report packs that you require.
- 7 Stop the MessageStats Scheduler Service on New_Server.
- 8 Copy the Tasks folder from Old_Server to New_Server.
- 9 Install any MessageStats hotfixes to New_Server that you had installed on Old_Server.
- 10 Start the MessageStats Scheduler Service on New_Server.
- 11 If any tasks were specifically configured to run using Old_Server as the task execution server (tasks that do not use the default task execution server), configure these tasks to use New_Server.

Moving and Upgrading MessageStats with at least One Installed Report Pack

Use this procedure when there is at least one report pack installed and one or more MessageStats components are being upgraded to a newer version.

This procedure is a variation of the previous procedure. The variation is required because the task document files must be refreshed to update any task templates that were changed in the new version. Unfortunately, the MigrateTasks.exe tool does not update the task document files. The task document files are updated automatically by some (but not all) of the MessageStats report pack installers.

- 1 Ensure there are no tasks running on Old_Server. Use the MessageStats console client to cancel any active tasks.
- 2 Remove all MessageStats report packs from Old_Server.
- 3 Remove MessageStats from Old_Server.
- 4 Copy the contents of the MessageStats program files folder to the new server **except** for the Tasks folder. Do not copy the Tasks folder.

It is important that you do not copy the Tasks folder yet. You will copy this folder later.

The default location is C:\Program Files (x86)\Quest\MessageStats.

- 5 Install the new version of MessageStats on New_Server using the appropriate MessageStats service credentials.
 - Ensure that the credentials have local administrative privileges on New_Server.
 - Ensure that the target folder for the installation matches the location to which you copied the program files folder from Old_Server.
- 6 Install all except one of the new versions of the report packs that you require. Do not install one of the report packs. You will install the last report pack in a later step.

The last report pack to be installed must be one of the following report packs:

- The MessageStats Report Pack for OCS/Lync Server
- The MessageStats Report Pack for Exchange ActiveSync
- The MessageStats Report Pack for OWA

These report packs have installers that will refresh the task documents for all scheduled tasks.

- 7 Stop the MessageStats Scheduler Service on New_Server.
- 8 Copy the Tasks folder from Old_Server to New_Server.
- 9 Start the MessageStats Scheduler Service on New_Server
- 10 Install the remaining new version of the report pack that was not installed with the other report packs.
- 11 If any tasks were specifically configured to run using Old_Server as the task execution server (they do not use the default task execution server), configure these tasks to use New_Server.

Moving Custom Reports and Report Subscriptions

- [Backing Up and Moving Custom and Saved Reports](#)
- [Backing Up and Restoring Report Subscriptions](#)

Backing Up and Moving Custom and Saved Reports

Custom reports are created when a user selects File | New | Custom Report. In the Web Report Wizard, the user selects the data source and fields to be used in the report. The user can also select the grouping options, sort order, and filters to create a custom report. Typically, the user views his or her custom reports under the [My Reports] folder.

In addition to custom reports, users can also create customized “saved” versions of the standard reports. To do this, a user browses to a report, sets specific filter settings, and selects File | Save Report Settings.

When you remove MessageStats, all the standard reports are removed but any custom reports and saved reports are still in the _Users folders.

In the instructions that follow, it is assumed that your current MessageStats reports web site is using the default location of C:\inetpub\wwwroot\messagestatsreports. If you are unsure of the location of your virtual directory, use the IIS console to verify the path. Check the Home folder tab of the virtual directory properties.

To move custom and saved reports

- 1 Open Windows Explorer.
- 2 Expand the treeview to display the following directory:
C:\inetpub\wwwroot\MessageStatsReports\Reports_Users.

The individual user directories in which custom reports (.qrp files) and saved reports (.qsrs files) are saved are located in the _Users directory.
- 3 Copy the _Users directory to a directory to be used for backed up reports.

In addition to the _Users folder, custom reports can be saved under Corporate reports which are located in the following path: C:\inetpub\wwwroot\MessageStatsReports\Reports\#0010_[Corporate Reports].
- 4 If you have custom reports that are saved under [Corporate Reports] in the Web Reports console, copy the \#0010_[Corporate Reports] folder to the backup location.
- 5 Restore the custom reports by copying the backed up _Users directory and the #0010_[Corporate Reports] to the following directory on the new server:

C:\inetpub\wwwroot\MessageStatsReports\Reports
- 6 On the new server, for each user folder in the _Users directory, assign Full Control permissions to the corresponding user.

Administrators can save custom reports not only in the [My Reports] folder but anywhere in the MessageStats reports tree. For example, if an administrator saved a custom report under the Servers folder, the resulting .qrp file is saved to the following folder path:

C:\inetpub\wwwroot\MessageStatsReports\Reports\#0100_Servers

Backing Up and Restoring Report Subscriptions

In the instructions that follow, it is assumed that your current MessageStats reports web site is using the default location of C:\inetpub\wwwroot\messagestatsreports.

If you are unsure of the location of your virtual directory, use the IIS console to verify the path. Check the Home folder tab of the virtual directory properties.

To back up report subscriptions

- 1 On the old server, open MessageStats Reports.
- 2 Select **File | Subscriptions**.
- 3 Click the Subscription you want to back up.
- 4 Select **Subscriptions | Export Selected Subscription**.
- 5 Save the file to the location to be used for backed up subscriptions.

To restore report subscriptions

- 1 On the new server, open MessageStats Reports.
- 2 Select **File | Subscriptions**.
- 3 Select **Subscriptions | Import Subscriptions** and select the files that were previously backed up.

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Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request.
- View Knowledge Base articles.
- Sign up for product notifications.
- Download software and technical documentation.
- View how-to-videos.
- Engage in community discussions.
- Chat with support engineers online.
- View services to assist you with your product.