

## Master Server Installation

1. **Download** the provided installation package.  
(<https://www.lakesidesoftware.com/product-briefs/introducing-systrack-90/>)
2. **Extract** the installation files to a location on your **SysTrack master system**.
3. **Right-click** the **Setup application** and select **Run as administrator** from the resulting menu.
4. A prompt may require a **system restart** before continuing the installation.
5. The **installer** should **start back up automatically** when the **user logs** back in.
6. At the **Welcome dialog**, mark the checkbox to **accept** the terms in the Software License Agreement and click **Next**.

SysTrack Installation Wizard and Prerequisite Checker

### Installation steps

- Welcome
- Installation Options
- Language Selection
- Database Type
- Reporting Account
- Web Services
- Free Space Verification
- Software Prerequisites
- Database Specifications
- Reporting Server
- Installation Summary

### Welcome

# Lakeside<sup>®</sup>

## SysTrack<sup>®</sup>

#### Software License Agreement

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☒ Check to accept the terms in the software license agreement.

< Back    Next >    Cancel

7. In **Installation Options**, there are several **installation options** to choose from in the Installation Options dialog. Default settings are shown.

The screenshot shows the 'Installation Options' tab of the SysTrack Installation Wizard. On the left, a vertical list of steps includes 'Welcome', 'Installation Options' (highlighted), 'Language Selection', 'Database Type', 'Reporting Account', 'Web Services', 'Free Space Verification', 'Software Prerequisites', 'Database Specifications', 'Reporting Server', and 'Installation Summary'. The main area is titled 'Installation Options' and contains several settings:

- ☒ **Install SysTrack and Web Services**  
SysTrack Services Folder Destination: C:\Program Files\SysTrack (with a browse button '...')
  - ☒ **Fully functional SysTrack Server**  
Typical choice
  - ☐ **Client Tools only SysTrack Server**  
Connects to existing live SysTrack database
  - ☐ **Passive SysTrack Server**  
Connects to offline copy of SysTrack database

Ensure that the version of SysTrack Services that you are installing is compatible with the version of the SysTrack database that you will be using.
- Web Services Folder Destination: C:\Program Files\SysTrack (with a browse button '...')
- ☒ **Install SysTrack Deploy**  
C:\Program Files (x86)\SysTrackTools (with a browse button '...')
- ☒ **Automatically perform necessary reboots**

At the bottom, there is a 'SysTrack Defaults' button and navigation buttons: '< Back', 'Next >', and 'Cancel'.

8. In **Language Selection** tab, select the language (**English**) to be used for SysTrack web-based applications and click **Next**.

The screenshot shows the 'Language Selection' tab of the SysTrack Installation Wizard. On the left, the same vertical list of steps is shown, with 'Language Selection' highlighted. The main area is titled 'Language Selection' and contains the instruction: 'Please select the language of your choice for web applications.' Below this is a list box containing the following languages: Arabic, Chinese, English (highlighted), French, German, Japanese, Portuguese, and Spanish. At the bottom, there are navigation buttons: '< Back', 'Next >', and 'Cancel'.

9. In **Database Type** tab, if we have an **existing SQL Server database** which has been configured prior to the SysTrack installation then select **Connect to existing SQL Server** to allow SysTrack services to connect the database or use an existing SQL Server database to install **SQL Server Express**. Create a strong password and write it in **SQL Server Express SA account password** and also in **Confirm SQL Server Express SA account password** and click **Next**.

The screenshot shows the 'Database Type' tab of the SysTrack Installation Wizard. On the left, a vertical list of steps includes 'Database Type' as the current step. The main area is titled 'Database Type' and contains two radio button options: 'Connect to existing SQL Server' and 'SQL Server Express'. The 'SQL Server Express' option is selected. Below this, there are two password fields: 'SQL Server Express SA account password' and 'Confirm SQL Server Express SA account password', both filled with dots. A text block explains that the password must be at least 8 characters long and contain uppercase, lowercase, numbers, and non-alphanumeric characters. Below the passwords are two text boxes for file paths: 'Location for database data storage' (set to 'C:\Program Files\Microsoft SQL Server') and 'Installation location for SQL Server Management Studio' (set to 'C:\Program Files (x86)\Microsoft SQL Server Management:'). At the bottom are '< Back', 'Next >', and 'Cancel' buttons.

10. In **Reporting Account** tab, enter a **Windows Domain Account** and **Username** in the following format: **domain\user** then enter a **Password** and click on **Test Credentials** for verifying and click **Next**.

The screenshot shows the 'Reporting Account' tab of the SysTrack Installation Wizard. The left sidebar shows 'Reporting Account' as the current step. The main area is titled 'Reporting Account' and contains a text block explaining that domain user account credentials are required. Below this, there are two input fields: 'Reporting User' (containing 'LSLAB\SA-SSRSReportUser') and 'Password' (filled with dots). A 'Test Credentials' button is located below the password field. At the bottom, a message states 'Your Reporting User credentials are valid'. Navigation buttons at the bottom include '< Back', 'Next >', and 'Cancel'.

11. In **Web Services tab**, in the **Web Services logging path** keep the default path (**C:\Logs**) or enter a different path.

In IIS TLS Configuration, select one of the following:

- Select the first option if a trusted certificate has already been created and installed on the local machine.
- Select the second option to create a self-signed certificate.

To maintain STIG compliance when selecting either of the IIS TLS Configuration options, we must complete the **Web Services Host Name** field and enter the **Web Services IP followed by :443** in the **Web Services IP field** and click **Next**.

The screenshot shows the 'Web Services' tab of the SysTrack Installation Wizard. On the left, a vertical list of installation steps includes 'Welcome', 'Installation Options', 'Language Selection', 'Database Type', 'Reporting Account', 'Web Services' (highlighted in orange), 'Free Space Verification', 'Software Prerequisites', 'Database Specifications', 'Reporting Server', and 'Installation Summary'. The main content area is titled 'Web Services' and contains the following sections:

- A checked checkbox: 'Make the SysTrack Launch page the default server page for Visualizer tools.'
- A text field for 'Web Services logging path (Default is C:\Logs):' with the value 'C:\Logs'.
- Fields for 'Web Services Host Name:' and 'Web Services IP: <IP>:<port>'. The IP field contains '\*:443'.
- An 'IIS TLS Configuration' section with three radio button options:
  - ☒ 'Configure IIS TLS for the SysTrack Visualizers Site by using an existing certificate from the Local Machine certificate store.'
  - ☐ 'Configure IIS TLS for the SysTrack Visualizers Site by creating, installing and configuring a new SHA256 2048-bit certificate which expires in 3 years (additional steps are required for client communication, see documentation).'
  - ☐ 'Don't make any changes. I have either already setup the certificate or I will do so manually by following the documented process to request, install and configure a certificate.'
- A 'Select Installed Certificate' section with a text box containing 'SysTrack Services - 3D9DDE47CD637A0658673C7979F6B873841B903A'.

At the bottom right, there are buttons for '< Back', 'Next >', and 'Cancel'. A watermark 'Activate W Go to Settings' is visible in the bottom right corner.

12. In **Free Space Verification tab**, wait while the space checker verifies if the system on which you are installing SysTrack has sufficient space and drive requirements. If our space requirements are met then click **Next**.

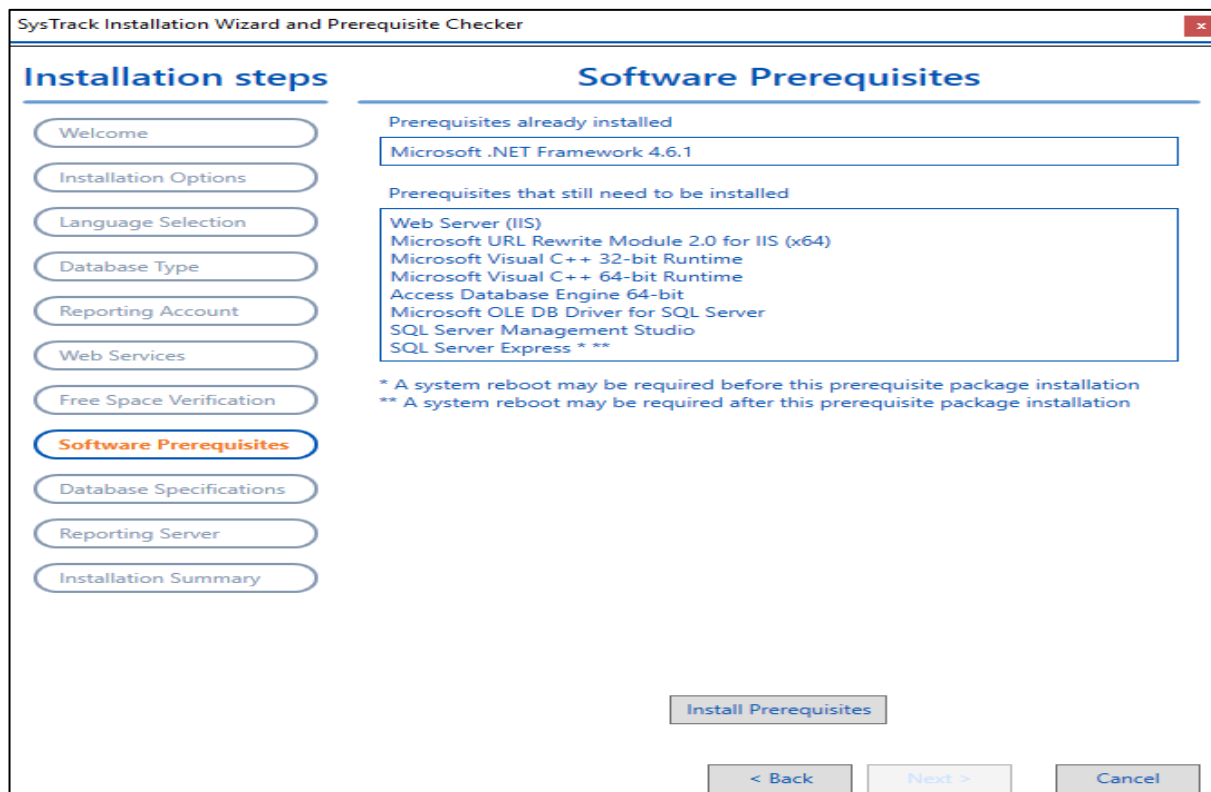
The screenshot shows the 'Free Space Verification' tab of the SysTrack Installation Wizard. The left sidebar is identical to the previous screenshot, with 'Free Space Verification' highlighted in orange. The main content area is titled 'Free Space Verification' and displays the message: 'All minimum space and drive requirements have been met.'

At the bottom, there are buttons for '< Back', 'Next >', and 'Cancel'.

If there is **insufficient space** to install SysTrack and its components, a message will display “**Free space on drive**” or “**redirect SysTrack components to a different drive that does have sufficient free space**”.



13. In **Software Prerequisites** tab, the **SysTrack installation** determines which required software is already on the system and which software needs to be installed. After running the prerequisite check a list of prerequisites already installed and those that still need to be installed are displayed. If prerequisites need to be installed click **Install Prerequisites** and click **Next**.



14. In **Database Specifications** tab, enter the name of our **GMSA** (Group Managed Service Account) and (make sure to include the dollar sign at the end) or **Windows Domain Account** in the **User** field. If we are using the **SQL Express** option, the fields will be pre-populated with default information and the login and password you provided on the **Database Type** tab. If we selected the **Connect to existing SQL Server** option then specify the **Login, Password** and **Database** that we created during the database preparation. Now we have to click **Test Database Connection** then **SysTrack Installation** verifies the database connection and displays a status progress table. If any of the database specifications do not pass the test, follow the recommendations listed in the **Description** column next to the failed items and click **Next**.

The screenshot shows the 'SysTrack Installation Wizard and Prerequisite Checker' window. On the left, a vertical list of 'Installation steps' includes: Welcome, Installation Options, Language Selection, Database Type, Reporting Account, Web Services, Free Space Verification, Software Prerequisites, **Database Specifications** (highlighted), Reporting Server, and Installation Summary. The main area is titled 'Database Specifications' and contains two sections. The 'Windows Authentication' section has two radio buttons: 'Group Managed Service Account (GMSA - Best Practice)' (selected) and 'Windows Domain Account'. Below these are 'User:' and 'Password:' text boxes. The 'SQL Server Database Connection Settings' section includes 'Server/Instance name:' (pre-filled with '.\SYSMGMT\_DB'), 'Database:' (a dropdown menu showing 'SysTrack'), and a 'Port' text box. A note states: 'The port number is only required when the SQL Server Browser service is disabled.' Below this is a 'Test Database Connection' button. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

15. In **Reporting Server** tab, if we are using a SQL Report Server then we need to set up our report server and ensure that it is working correctly. So choose from one of the following:
- Select **Enter individual components to create a Report Server URL** option and then complete the information for each field for this option.
  - If we know our report server's URL, select **Enter a Report Server URL** option and then enter the URL in the provided field.
  - Enter an optional **SSRS configuration user account** to be used as a reporting account for a successful connection test to the report server and enter the **password**.
  - Enter a **windows domain user** or **group account** to the SSRS Content Manager role in the Group or user name field.
  - Then click **Test Report Server URL** to verify the connection and click **Next**.

A SQL Report Server is the central component of a Microsoft SQL Server Reporting Services (SSRS) installation. Using a SQL Report Server allows you to display various reports in SysTrack applications such as SysTrack Visualizer and Transform.

The screenshot shows the 'Reporting Server' step of the SysTrack Installation Wizard. On the left, a vertical list of steps includes 'Welcome', 'Installation Options', 'Language Selection', 'Database Type', 'Free Space Verification', 'Reporting Account', 'Web Services', 'Software Prerequisites', 'Database Specifications', 'Reporting Server' (highlighted in orange), and 'Installation Summary'. The main area has two radio buttons: 'Skip SQL Server Report Server configuration' and 'Enter individual components to create a Report Server URL' (selected). Below the second option is a checkbox 'Uses secure connection?' which is checked. There are four input fields: 'Report Server name' (containing 'localhost'), 'Port number' (containing '443'), 'Virtual directory name' (containing 'ReportServer'), and 'Instance name' (containing 'Sysmgmt\_db'). Below these is a text box for the URL format: 'https://<servername>:<port>/<virtualdirectory>\_<instancename>'. Further down are fields for 'Root content location (optional)', 'SysTrack master server name' (containing 'sp-qa2016Clean.islab.org'), 'SSRS configuration user (optional)', 'Password', and 'Group or user name (optional)'. A note states: 'The instance name is required if SQLServer Express or Reporting Services was installed as a named instance. Port number may be omitted if default port (443 for https) is used.' A 'Test Report Server URL' button is present. At the bottom are '< Back', 'Next >', and 'Cancel' buttons.

16. In **Installation Summary**, click **Process Selections** to proceed with the installation and wait while the SysTrack services, Web Services and Administrative tools (SysTrack Deploy) install. The system will reboot to complete the installation.

The screenshot shows the 'Installation Summary' step of the SysTrack Installation Wizard. The left sidebar is identical to the previous step, but 'Installation Summary' is now highlighted in orange. The main area contains a message: 'It looks like you've chosen to use an existing SQL Server to install, upgrade or uninstall the products listed below. After the process has completed, the local server will be rebooted in order to complete the installation.' Below this message is a list of tasks: 'Run SysTrack Database Prep Service', 'Install SysTrack Services', 'Install Web Services', and 'Install SysTrack Deploy'. At the bottom is a 'Process Selections' button. The '< Back', 'Next >', and 'Cancel' buttons are also present.

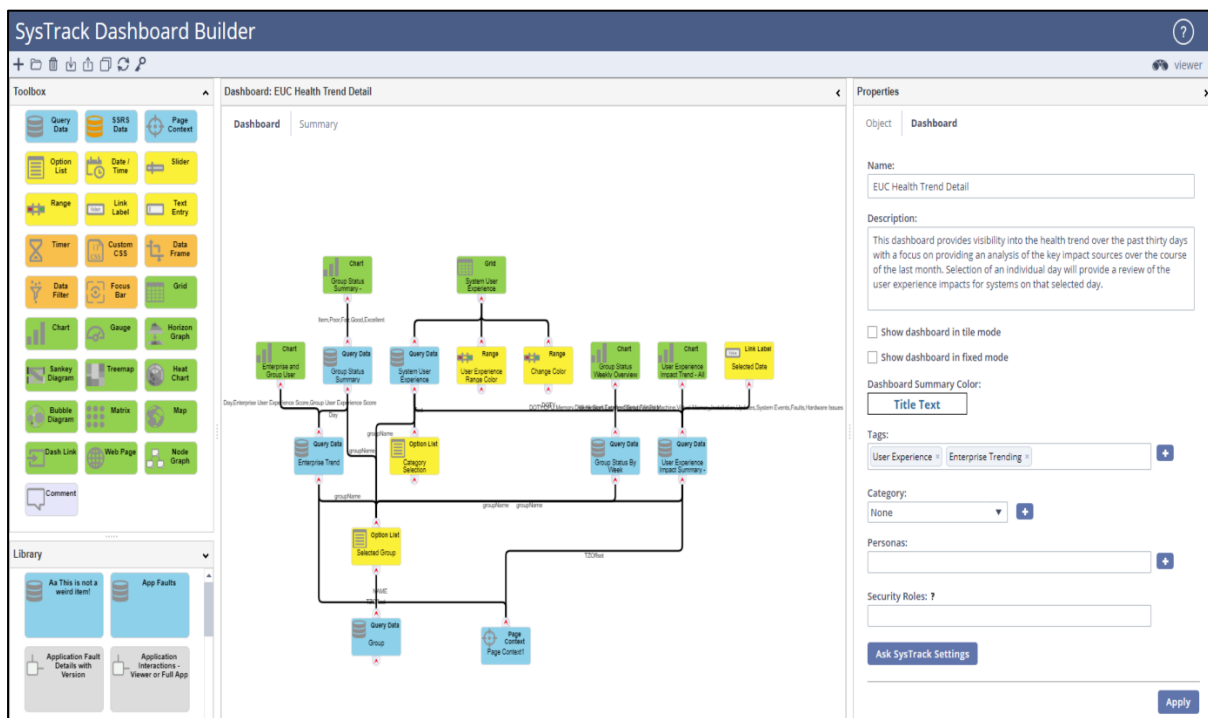
## Dashboard

**SysTrack dashboards** are installed with SysTrack and provide customized views of real-time data, allowing insights into SysTrack data as well as external databases. **Dashboards** can display this data in a **variety of formats**, including a grid, different types of charts, gauges, and other visualizations. The user can interact with the dashboard by providing input on selections, modifying filter criteria, and customizing information displayed in the charts.

**Dashboard Viewer:** SysTrack dashboards can be viewed from the **SysTrack Dashboard Viewer**.



**Dashboard Builder:** Dashboards are created using the **Dashboard Builder**.

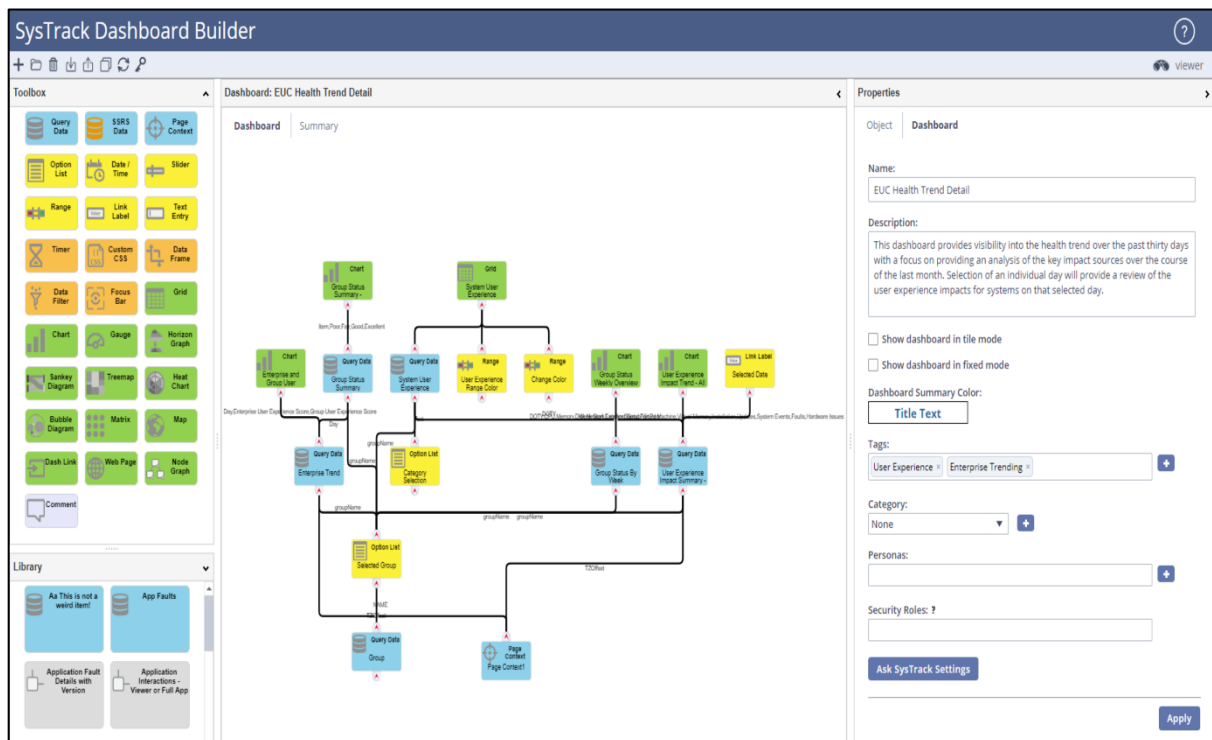




## Build SysTrack Dashboards

The SysTrack Dashboard Builder provides a means for IT professionals to easily **create, save, share and refine custom views** of any of the data available to them in their enterprise in a way that is easily accessible to a viewer.

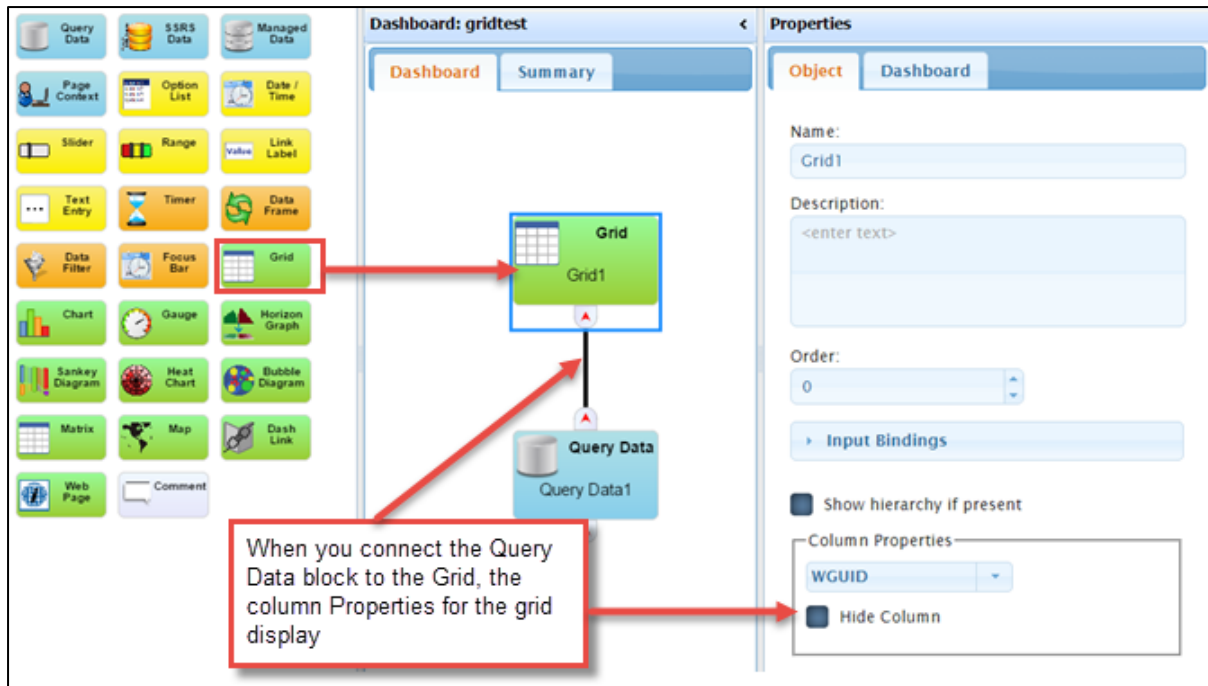
Dashboards are built by using a variety of data blocks and visualization objects on the Dashboard workspace, defining each object's properties, and linking them



## Build a Basic Dashboard

Dashboards are built by dragging data blocks and virtualization objects from the Toolbox to the workspace, defining each object's properties, and linking them to one another

1. Drag a **Query Data block** to the workspace and define the Query Data block as necessary. The Query Data block retrieves data based on a SQL query and makes it available to a grid or other visualization objects. For users who are not completely familiar with writing SQL queries.
2. Drag a visualization object block to the workspace (for example, a grid, gauge etc)
3. Connect the Query Data Block to the visualization object (grid, gauge, chart, etc) to supply data input to the visualization object.
4. Open the **Input Bindings** section, and if necessary select an input. The **Input Bindings** section may be populated automatically if there is only one possible input for the type of object being linked.



5. Set the **Properties** for the visualization object on the **Object** tab (such as the **Column Properties** in the example above).
6. Optionally, supply an **Order** for where on the Dashboard you want the grid to display.
7. Optionally, rename the visualization object block in the **Name** field, and provide a **Description**. The name will appear in the visualization object's title bar when the dashboard is viewed.
8. Click the **Apply** button on the **Dashboard** tab to save your changes.
9. Optionally, select the **Dashboard** tab, then add a **Name** and **Description** and select a **Dashboard Summary Color**. The dashboard name and description will display in any link to the dashboard, such as the Dashboard Browser. The Dashboard Summary Color will be used in the Dash Link object when it displays a link to this dashboard.
10. Optionally, either **select or define** any search tags, categories, or personas you want to include with your dashboard.
11. If you wish to display your dashboard in Tile mode (suitable for mobile devices), select the **Show dashboard in tile mode** check box.
12. If you wish to **restrict access** to this Dashboard in the Dashboard Viewer select a security role (group or user) from the drop-down list in the **Security Roles** field. Leave this field blank if you wish all Dashboard Viewer users to have access to your dashboard.
13. **Preview** to see how it displays in the Dashboard Viewer

Properties

Object

Dashboard

Name:

Description:

☐ Show dashboard in tile mode
 ☐ Show dashboard in fixed mode

Dashboard Summary Color:

Title Text

Tags:

+

Category:

None

+

Personas:

+

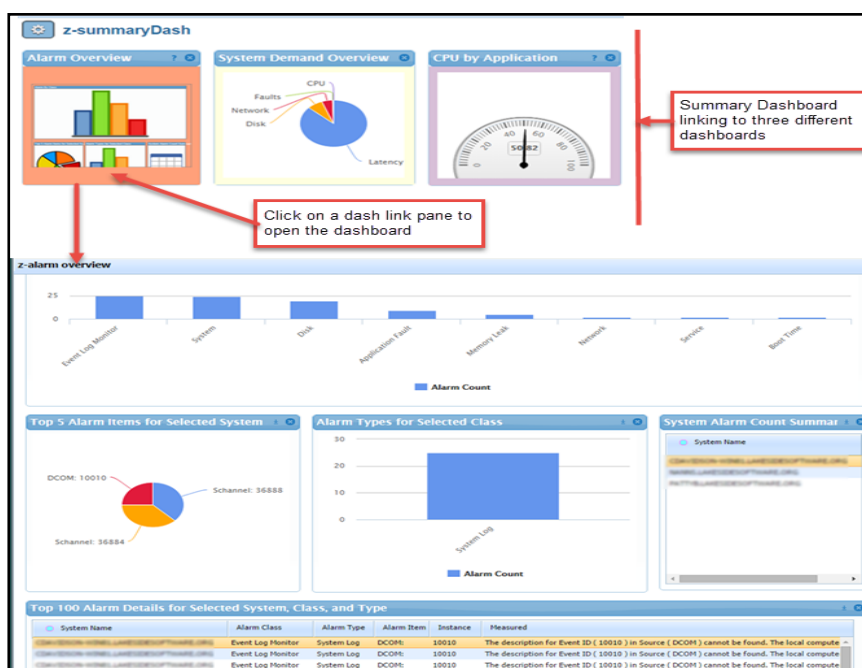
Security Roles: ?

Ask SysTrack Settings

Apply

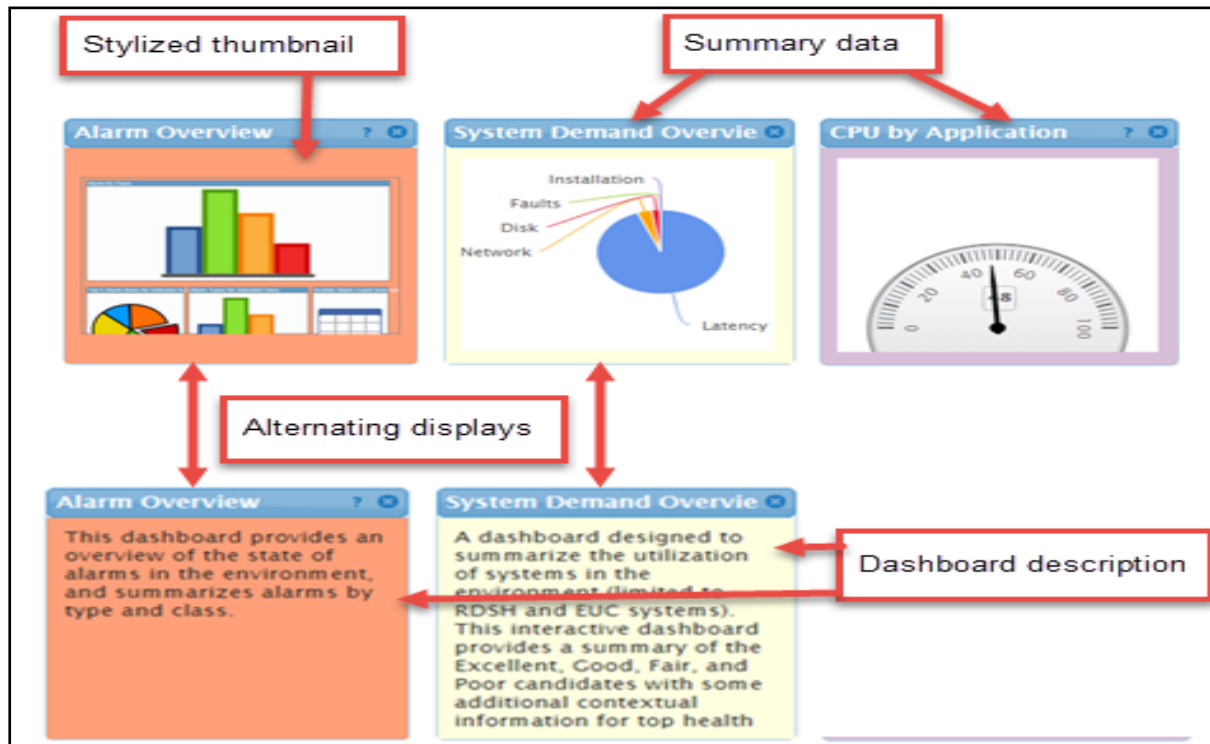
## Create a Summary Dashboard

You can create a summary dashboard composed of dash link panes each of which links to a specific dashboard as shown in the example below.



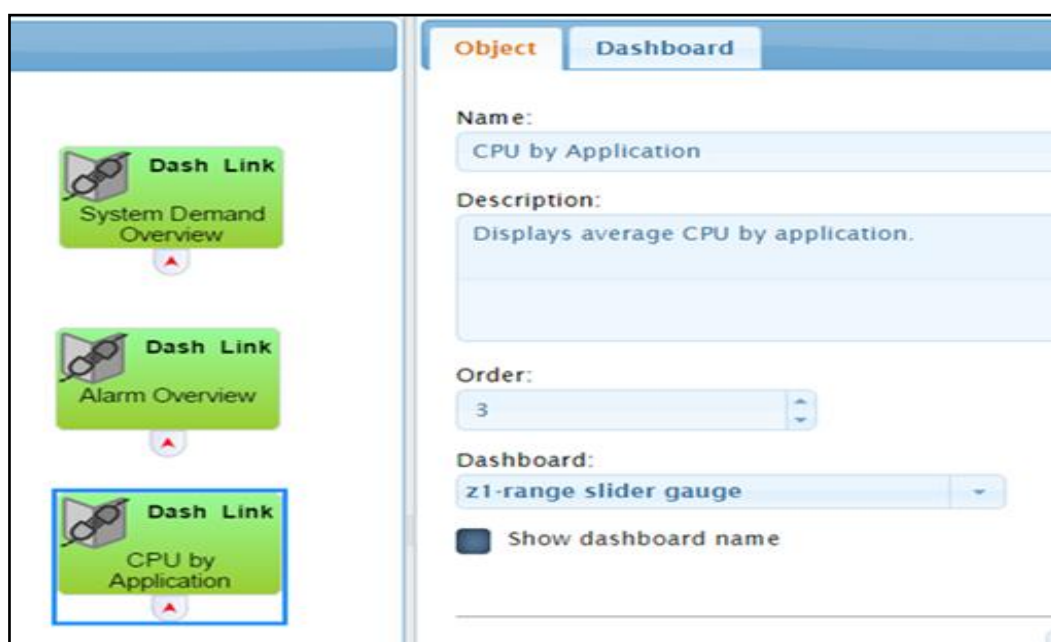
You can choose to display the following on a summary Dash Link pane:

- Alternate between displaying a description of the dashboard and a stylized thumbnail
- Alternate between displaying a dashboard description and summary data from a grid, chart, or gauge
- Display only summary data from a Grid, Chart, or Gauge with no alternating description

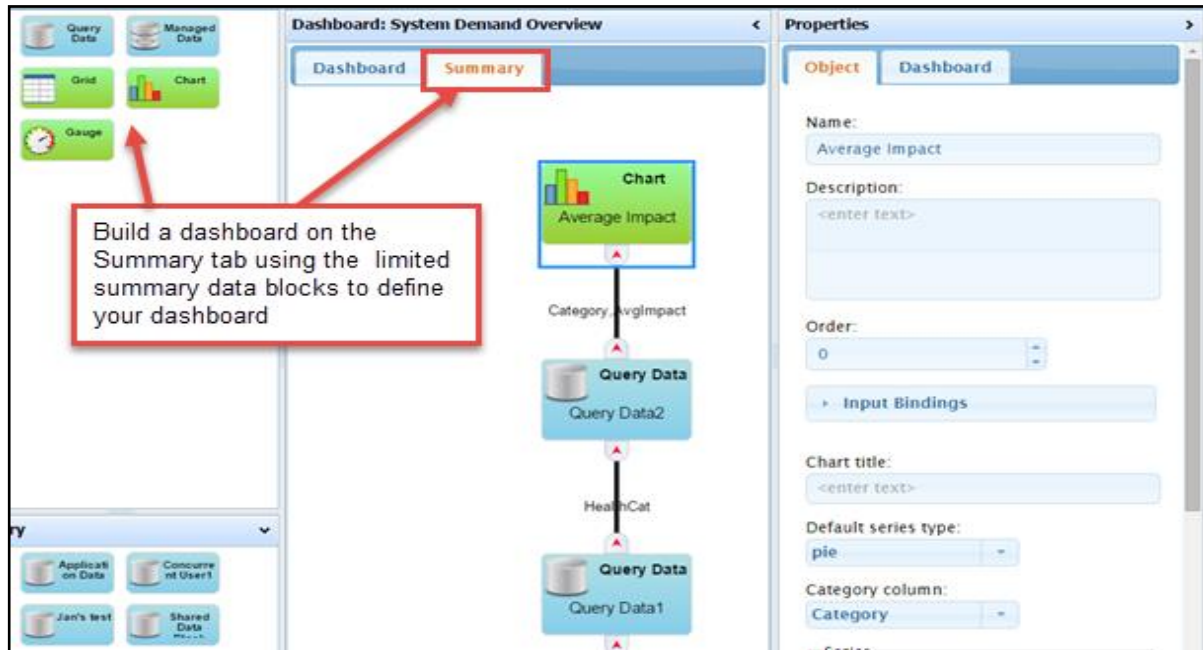


### Create a Summary Dashboard for Linked Dashboards

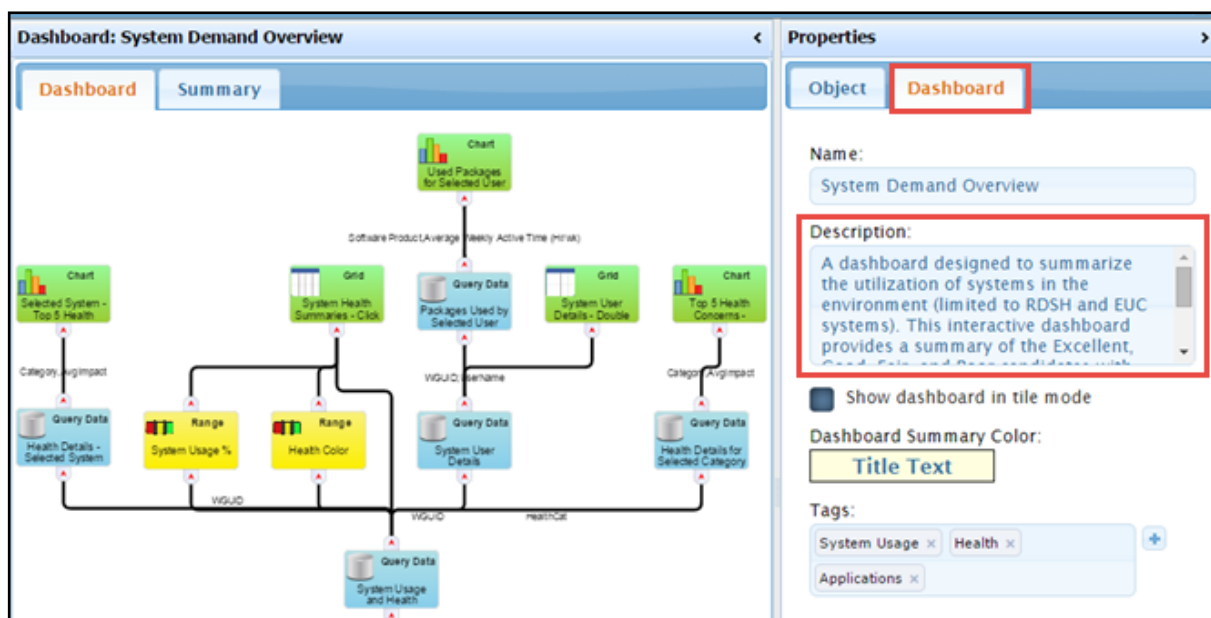
1. Define a **Dash Link** block on your workspace for each dashboard to which you wish to link.



2. Optionally, display **summary data on a Dash Link pane**:
  - Open the **dashboard** to which you wish to link, and click the **Summary tab**.
  - Using the **Data blocks** available in the **Summary tab Toolbox**, build a dashboard for the summary information that you wish to display.



3. If you wish to display a **description** for your dashboard link, enter a description in the **Description field on the Dashboard tab** for the dashboard to which you are linking



4. Optionally, click the **Dashboard Summary Color** button to select a color to use as the background color for the Dashboard Link Pane.
5. Click **Apply** to save your changes.
6. **Repeat** steps 2 - 5 for each dashboard to which you wish to link from a **Dash Link block**.