Relativity®

Performance Dashboard Deployment Guide

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kCura®

Contents

1. Overview

The Performance Dashboard (PDB) application consists of stand-alone components that work together to collect, store, process, and display performance information for the Relativity environment in which they are deployed.

These components include the following:

- Performance Database (PD) – resides on the same database server as the main Relativity database. It is used primarily as a repository for the collected and aggregated performance data.
- PD Windows Service – resides on one of the app servers in the Relativity environment. It runs in the background, kicking off processes that measure overall application health as well as the performance of different servers in the environment. It saves the collected data to the Performance Database.
- PD Web Service – resides on one of the web servers in the Relativity environment. It provides an interface to the Performance Database.
- PD Web Application – resides on one of the web servers in the Relativity environment and is accessed from the Admin area of Relativity. It allows Relativity Admins to access performance data via a graphic user interface.

2. Database

Perform the following steps to set up a new Performance database.

1. Use the **EDDSPerformance_DB.sql** script to create a new **EDDSPerformance** database on your Relativity database server.
    a. Before executing the script in your environment, open it with a text editor and update the path for the FILENAME parameter in the CREATE DATABASE statement to match your environment, if necessary. (Defaults: "D:\EDDSPerformance.mdf" – db, "E:\EDDSPerformance_log.ldf" – log)
    b. Update DOMAIN\RelativityAccount on lines 4 and 6.
2. Use the **EDDSPerformance_MetaData.sql** script to insert metadata records into the newly created **EDDSPerformance** database.

3. Ensure that the Relativity service account that is used for the Windows Service & Application Pools has proper access credentials (sysadmin role) on the Database Server.
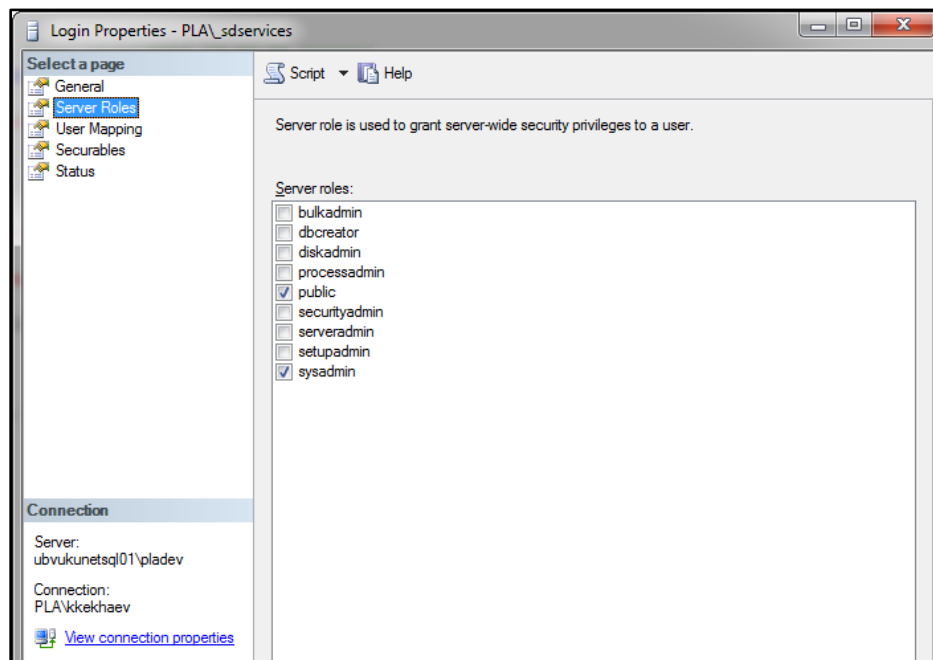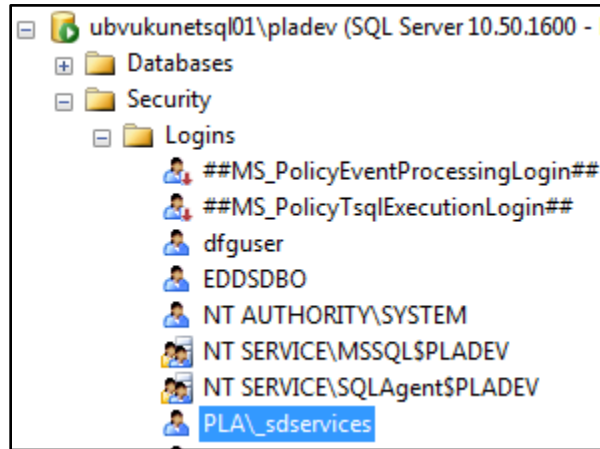
3. Web Service/Web Application/Windows Service

Perform the following steps to prepare the environment for deploying the Web Service, the Web Application, and the Windows Service.

1. Extract the contents of the **Performance Dashboard.zip** file to a location on the Relativity Web Server. This will create folders with the following components:
   - kCura.PDB.Web – Web Application
   - kCura.PDB.WebService – Web Service
   - kCura.PDB.WindowsService – Windows Service
2. Modify the configuration files to set environment variables in each of the components:
   a. kCura.PDB.WebService\ Web.config
      i. enterpriseLibrary.ConfigurationSource – location of kCura.config
         (Default: "kCura.config")
      ii. ConnectionString – connection string for your SQL Server
   - Update the SQL Server Name
         - connectionString="Data Source=localhost;Initial Catalog=EDDSPerformance;Integrated Security=True"
   b. kCura.PDB.Web\ Web.config
      i. enterpriseLibrary.ConfigurationSource – location of kCura.config
         (Default: "./kCura.config")
   c. kCura.PDB.WindowsService\kCura.PDB.WindowsService .exe.config
      i. enterpriseLibrary.ConfigurationSource – location of kCura.config
         (Default: "kCura.config")
      ii. ConnectionString – connection string for your SQL Server
         - Update the SQL Server Name

3.2 Web Service

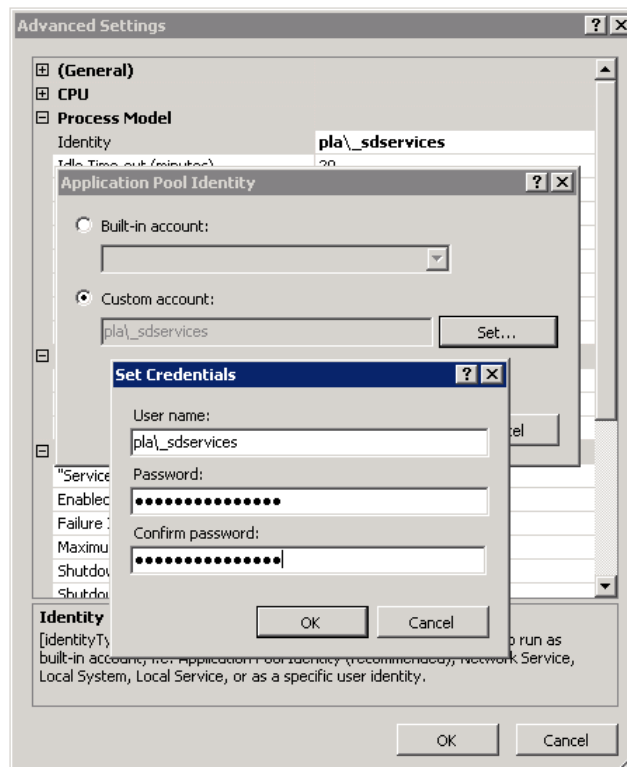To configure the Web Service, create two application pools: **PDBSvcApplicationPool** and **PDBApplicationPool**. Each pool will have one application added to it: kCura.PDB.WebService and kCura.PDB.Web, respectively.

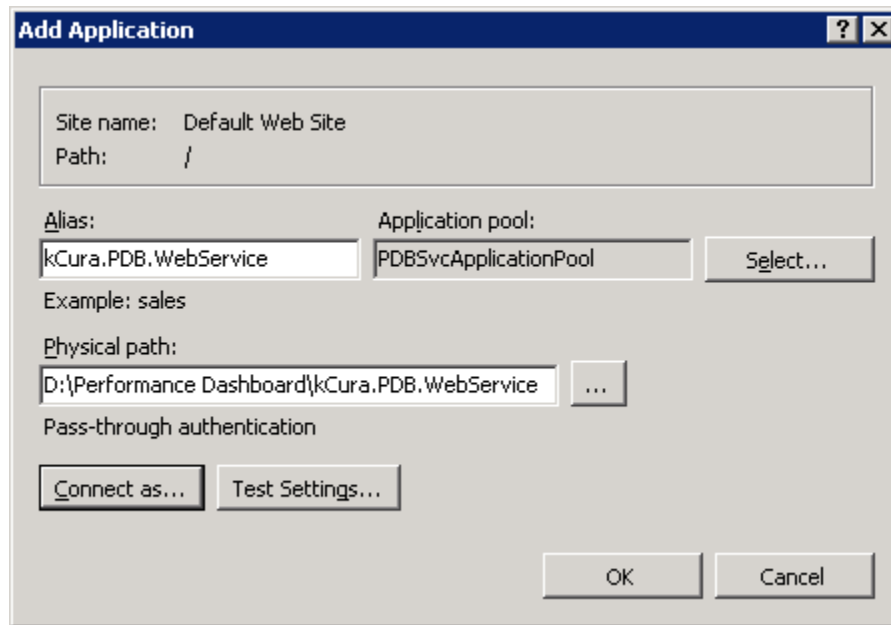The identity for each application pool is **DOMAIN\RelativityService**.

1. Create **PDBSvcApplicationPool** to run the website.
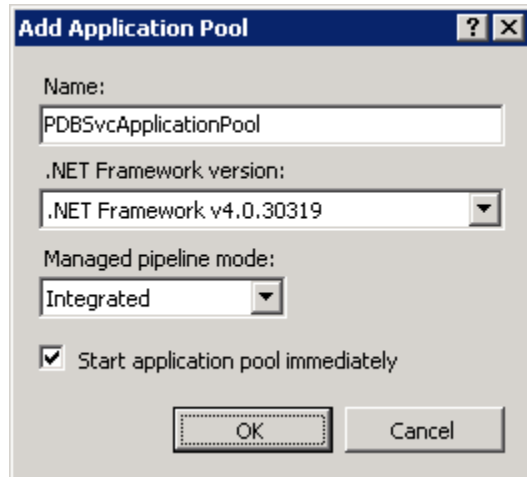
2. Set **Identity** to the Relativity Service account.

3. In IIS, add a new Application for **kCura.PDB.WebService** and add it to **PDBSvcApplicationPool**.
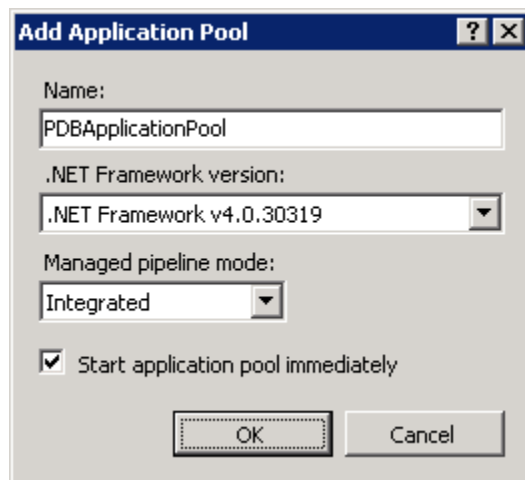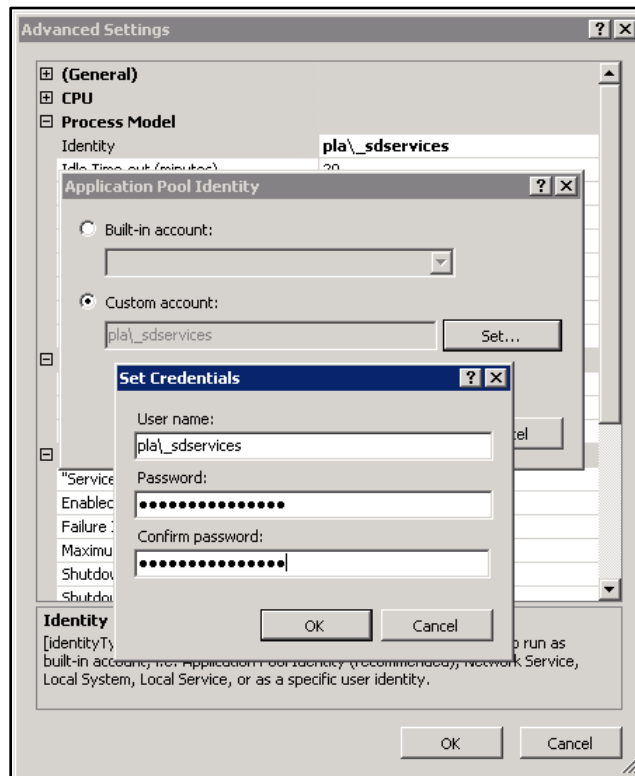

3.3 Web Application

Perform the following steps to configure the Web Application.

1. Create **PDBApplicationPool** to run the website.
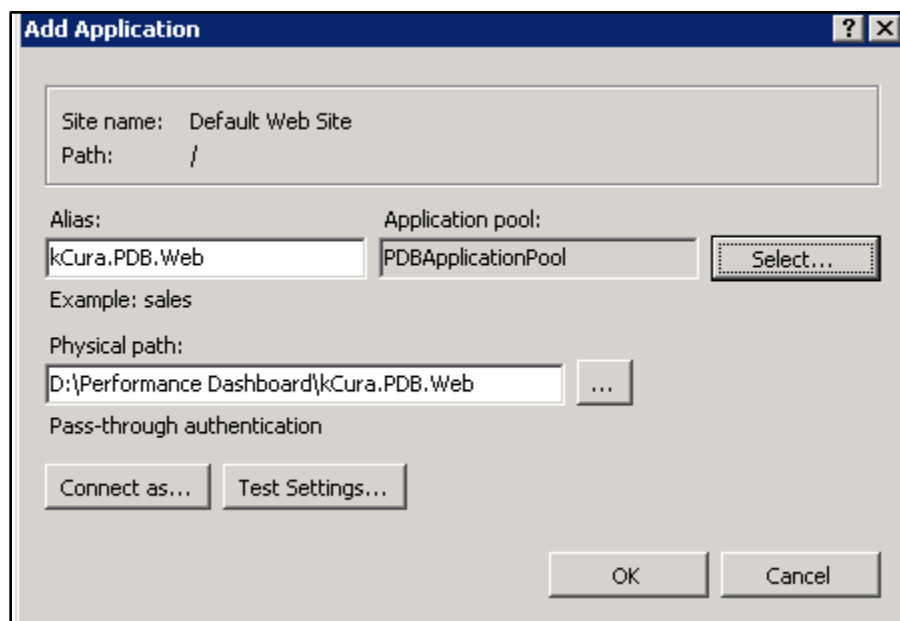   Use Relativity Admin user for the application pool identity.

2. Set **Identity** to the Relativity Service account.

3. In IIS, add a new Virtual Folder under the Relativity Web Site and use **PDBApplicationPool** as the application pool to run the website.

3.4   Windows Service

Perform the following steps to register and configure the Windows Service.

1. Check to make sure the executable is not blocked:
   a. Navigate to **%PLA_Root%\kCura.PDB.WindowsService**.
   b. Right-click **kCura.PDD.WindowsService.exe**.
   c. If the **Unblock** button appears, click it to unblock the executable.
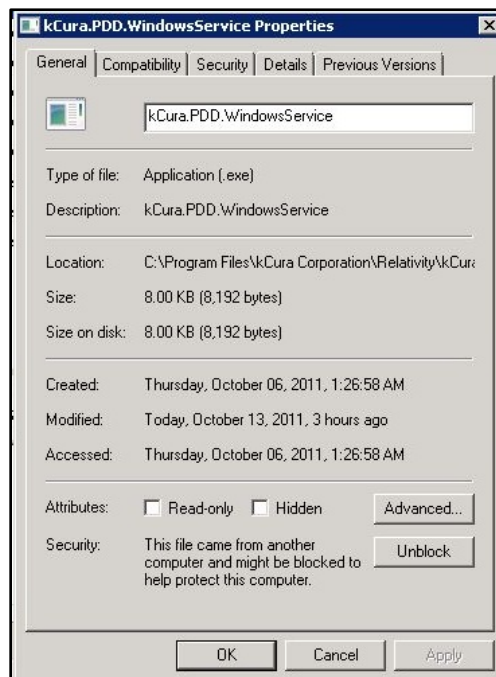
2. Open Command Prompt.
3. Select the folder that contains the service:
   cd C:\Performance Dashboard\kCura.PDB.WindowsService.
4. Execute the following command to register the Windows service:
   C:\Windows\Microsoft.NET\Framework\v4.0.30319\InstallUtil kCura.PDD.WindowsService.exe
5. When prompted for the user name and password of the service account, enter the credentials of the Relativity Service account along with the domain name, i.e., **DOMAIN\RelativityService**.
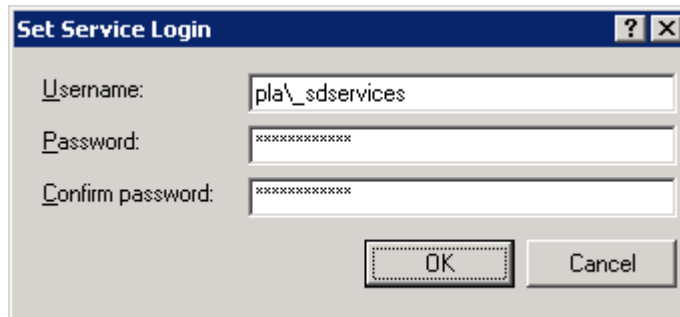
6. Change the Service Startup type.
    a. Open the **Administrative Tools\Services** console and scroll down to **Relativity Performance Data Collection Service**.
    b. Set the **Startup Type** to **Automatic** and click **Start.**
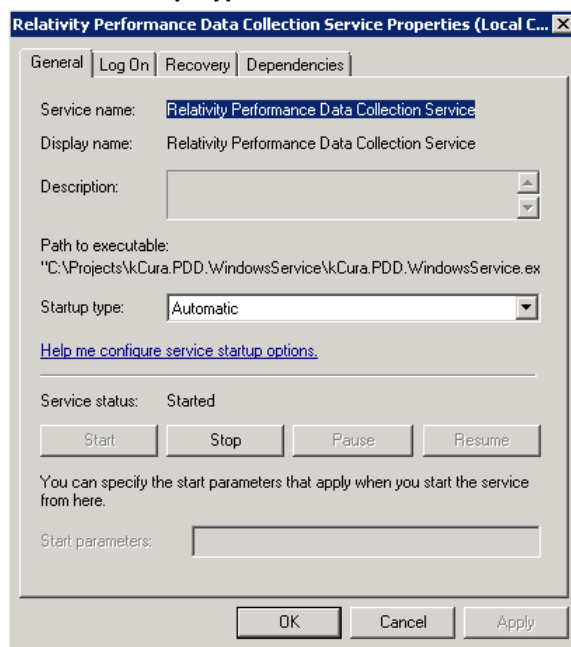
4. Create External Tabs

Once deployment is complete, you can create external tabs in Relativity that give you a direct view of Performance Dashboard data.

1. Create a new Performance Dashboard parent tab in Relativity.
2. Under the newly created Performance Dashboard tab, create an external tab for Application Performance using the following address (where "localhost" is the Relativity URL or web server name:

http://localhost/kCura.PDb.Web/ApplicationPerformance.aspx

3. Under the Performance Dashboard tab, create an additional external tab for Server Health using the following address (where "localhost" is the Relativity URL or web server name):

   http://localhost/kcura.pdb.web/serverhealth.aspx

5. Disclaimer

This documentation is proprietary information of kCura Corporation and may be modified, altered, or repurposed only in accordance with written consent from kCura. The information in this guide is subject to change.