



**Symitar**  
SDS

# **SDS Upgrade Instructions**

SDS Release 2022.0

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# Preparing for the Upgrade

Please read this entire document before beginning your upgrade.

## Before the Upgrade

Before beginning your upgrade, make sure you have completed the following:

**Open an EDS Support Case:** Open an EDS support case noting the day you plan to install the upgrade. Enter any questions in the case and have answers prior to starting the upgrade.

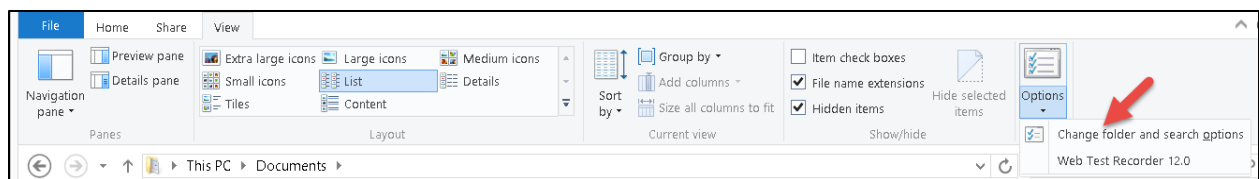
**Verify Current Release:** You must be on EDS release 2021.0 in order to upgrade to release 2022.0. Your current release level can be verified by clicking on Support Information in the EDS portal.

**Have Current Database Backups:** We strongly recommend that you back up databases before starting the upgrade.

**Provide the Installer with Admin Role:** The user running the installer must be an administrator on the server and must have the administrative role on the SQL Server instance.

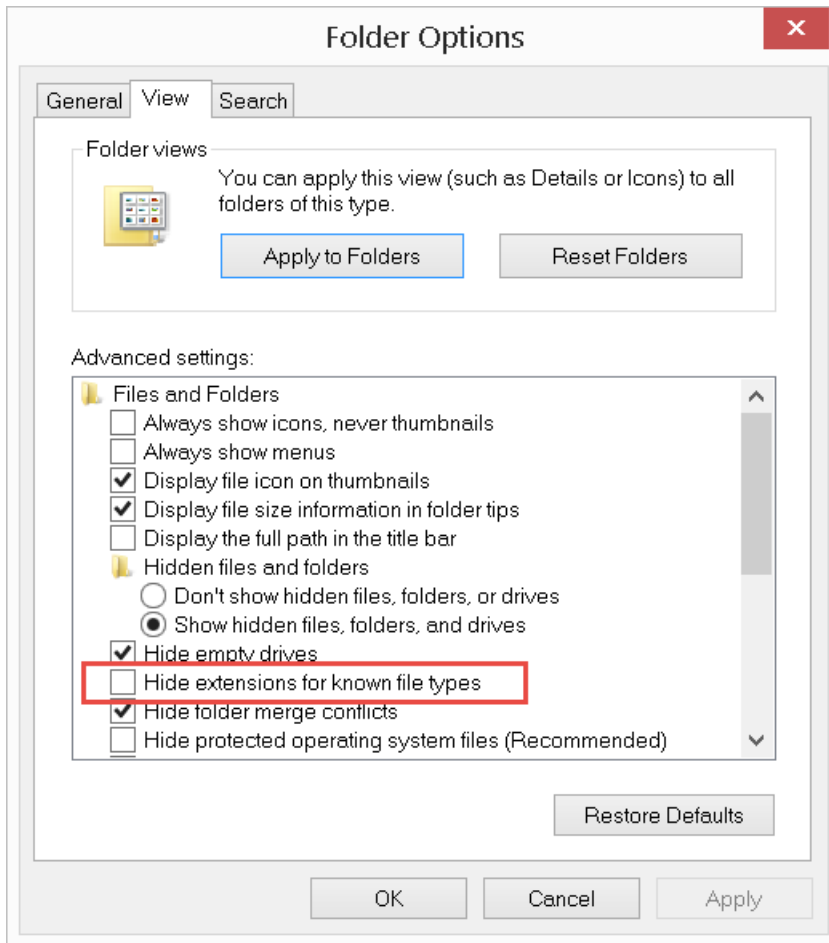
Set Windows Explorer Settings to Show All File Extensions: This is highly recommended. If you have not already done this, follow these instructions:

- Go to the View menu in Windows Explorer. On the ribbon, click **Options**, and then select **Change folder and search options**.



A **Folder Options** dialog box appears.

- Click the **View** tab, and in the **Advanced Settings** list box, clear the **Hide extensions for known file types** radio button.



## Organizing for the Upgrade

[Appendix A: Provisioning Checklist](#) itemizes the information you will need to have when you run the upgrade. Gather the following information to organize your financial institution for the upgrade.

- **Server Names**
  - If you are running separate data and web servers, you need the name and domain name for each server.
  - If you are running a single server, the data and web server names and domain names will be the same.

- **SQL Server**

EDS currently supports these versions of SQL Server:

SQL Server Version	Full 4-Part Version	Minimum Packaged Release
SQL Server 2012	11.0.7001.0	SP4
SQL Server 2014	12.0.2342.0	CU5
SQL Server 2016	13.0.1601.5	RTM
SQL Server 2017	14.0.0.0	RTM
SQL Server 2019	15.0.2000.5	CU12

- **Server Principals**

The installation requires up to two Active Directory principals, with passwords. We recommend that the passwords for these principals do not expire.

The principal you provide as the SQL principal must have these rights granted to it:

- Log on as a service
- Log on as a batch job

The SQL principal must also be either a member of the Administrators group or the Performance Monitor Users group.

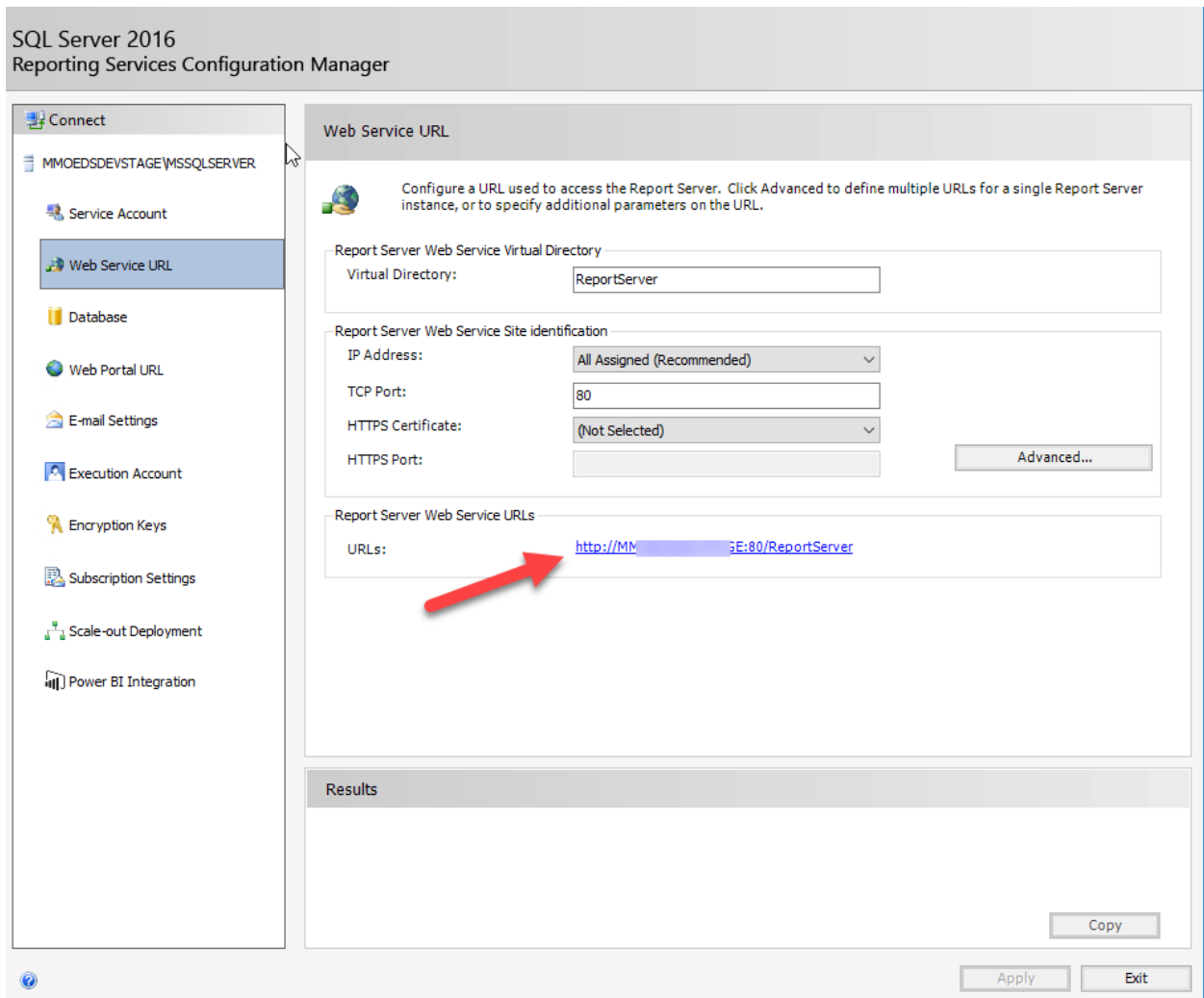
**TIP**

Make sure you know what the principal accounts and passwords are; you will be prompted for them.

- **SQL Server Reporting Services**

EDS contains reports that SQL Server Reporting Services (SSRS) execute. The EDS portal must know where to publish reports and where to get SSRS to run them on your behalf.

In the SQL Server Reporting Services Configuration Manager, an SSRS configuration defines a web service URL and a web portal URL. The web service URL is the URL we want:



The default port is 80, so if the URL uses port 80, the **:80** can be omitted. If the URL is defined to use a port other than 80, that port must be part of the URL. This is the URL that you will need for the report server URL when prompted.

- **Installation Drive Prompts**

There are several prompts for drives in the installer. These drives must be local to the server and permanently available. For example, you can select the **EDS Log Drive**, but the EDS Log folder will always be **\EDS\Logs** on the selected drive.

- **Database Notification Email**

Starting with release 2022.0, EDS can be configured to send notification email if selected tables do not receive updates in a defined time interval. If this feature is to be used, the installer must configure the SQL Server instance to set it up.

See <https://docs.microsoft.com/en-us/sql/relational-databases/database-mail/database-mail> for an overview of how SQL Server works with an SMTP mail server to send mail.

The installer knows how to define a mail profile and mail account. However, it requires the following to complete the setup:

- The email address to use as the sender of notification mail
- The fully qualified name of the SMTP server
- **Database Storage Locations**

This page collects:

- Data and log file locations for each database
- The default backup location

The installer will not move existing data or log files to new locations. Relocating SQL Server log or data files is a database administration activity and is described in the Microsoft® SQL Server documentation.

## Using a Clustered Data Server

The installer understands how to install on and upgrade to a clustered data server, such as SQL Server Always On. You need to have answers to the following questions before you do the upgrade:

- What is the DNS name for the entire cluster?
- Which cluster node is currently primary at the time you perform the upgrade?

To be in a SQL Server Always On availability group, a database must use the full recovery model. When the installer upgrades a database, it will leave the database in the recovery model it was in before.

## Performing the Upgrade

### Locate the EDS Installation Drive/Folder

Locate the previous EDS installation directory(Example. C:\EDS) To confirm, under the EDS directory, there should be a folder named "Installation". If you don't find this combination on the C Drive, check other drives on the server.



## Download SDS Installer and Schema Updates

Download SDS\_2022.0.zip and Symitar\_2020.00-2022.01-

SDS\_SQL\_Schema\_Updates.sql from <https://jhdownloads.jackhenry.com>; log in to this site using your *For Clients* portal credentials.

## Unpack the Installation Archive

Save the SDS\_2022.zip in the EDS directory. Next, rename the existing installation folder, by adding its version number at the end. An example would be to name it Installation-2021. Right-click the zip file and select "Extract All...". When prompted on the "Select a Destination and Extract Files" dialog, enter the Drive Letter and EDS(Example. C:\EDS). Do NOT put anything after EDS. Then click "Extract". Allow 400 MB for the unpacked archive contents.

## Copy the Previous Configuration Settings

Since you have a previous installation folder, copy the configuration.data.xml file from the old, renamed Installation folder and save a copy in the new \EDS\Installation folder. The installer will use it to fill in most of the configuration settings. You will still see all the prompts, but those supplied in the previous installation will be filled in with the previous values.

- Passwords are never saved in the configuration data file. You will always have to enter valid current passwords for service principals.

## Suspend the Episys ODS Agent

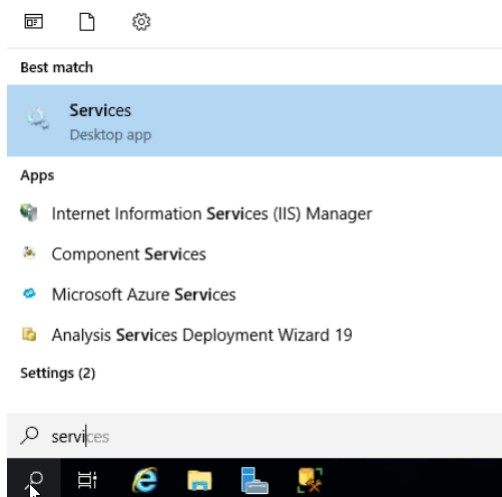
The upgrade cannot complete if other users are accessing the EDS Database, because they will hold locks that will block tasks in the upgrade. Just before starting the installation, suspend the ODS Agent on the SYM that feeds EDS.

When you suspend the ODS agent, Symitar continues to queue transactions to be applied to SDS when the ODS agent is resumed. If you terminate the ODS agent, Episys data changes from that point until the ODS agent is restarted will never be forwarded to SDS.

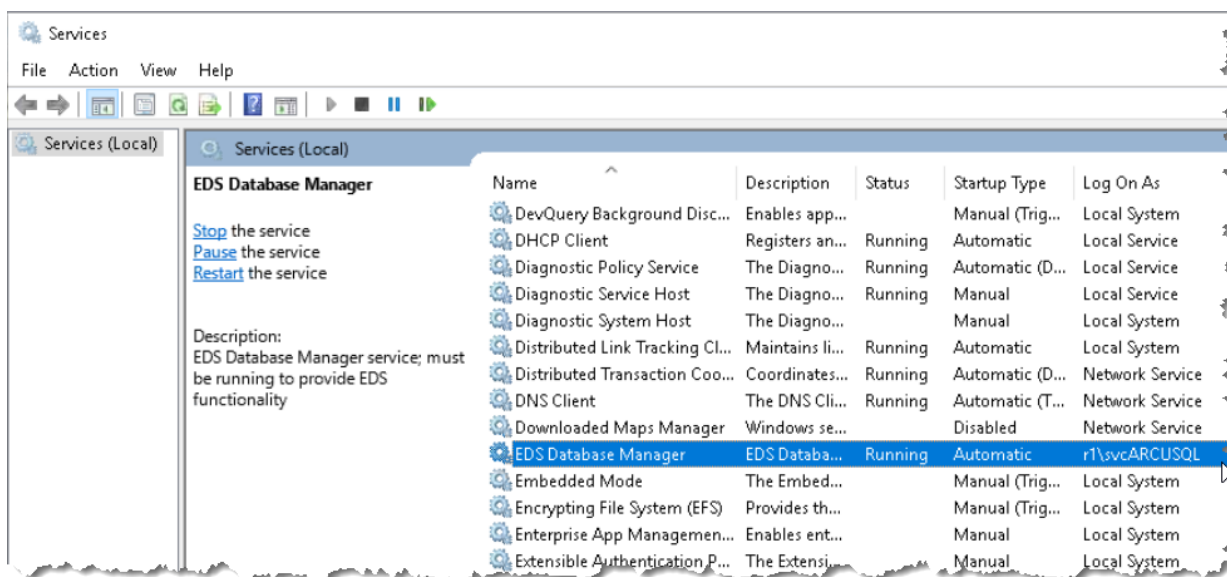
## Stop the EDS Database Manager Service

New versions of the EDS Database Manager are deployed with each upgrade. To ensure there are no issues, stop the service on the windows server.

On the server, click the magnifying glass on the taskbar and type “Services”. Click on “Services” when displayed.



On the following window, scroll down till you find “EDS Database Manager”. Right-click on that entry and select “Stop”. The status should no longer indicate it is running.

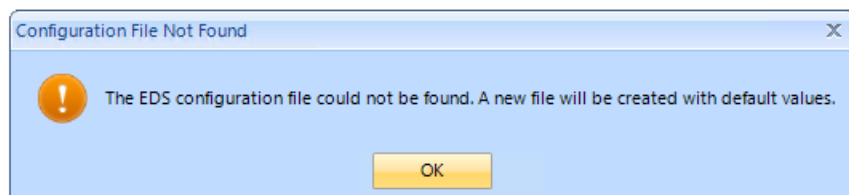


## Start the Installer

Right-click on the EDSInstaller.exe file, in the new \EDS\Installation folder, and select Run as administrator.

If there is a configuration.data.xml in the installer folder, the installer will attempt to read it. If it can be read, the installer will plug in the values it used last time; you will

be able to modify these if you choose. If there is no file or it cannot be read, this message box appears:



## Page by Page Summary

The following is a summary of the purpose of each page of the installer, along with any issues of which you should be aware. Go through each page sequentially to complete the installation.

[Appendix B](#) provides a detailed discussion of the pages that prompt for input, with screenshots. Use it if you are unfamiliar with the installer or want clarification about the information that a particular prompt is seeking.

Even if you use [Appendix B](#), refer to this summary for key information about each page.

- **Welcome Page:** This is simply a landing page.
- **Installation Type Page:** This page asks basic questions about the installation being performed:
  - Is it a new installation or an upgrade?
  - What is the role of the server on which the installer is being run?
  - What version of SQL Server is being used?
  - Is the server acting as the data server clustered?
- **Setup Requirements Page:** This page contains tasks that are required to set up the installation. You must run all the tasks successfully before you can proceed to the next page.
- **EDS Settings Page:** This page collects information that controls specific placement of EDS files and behaviors of processing.
  - For drive selections, the default values of drives are not necessarily the values of drives given when EDS was installed. Verify that the selected drive is where you really want those files going before proceeding past this page.
  - Make sure that you positively choose a **Branch Description Source** before proceeding past this page.

- **Web and Application Server Settings Page:** This page identifies the web server and application server in use. Whether or not the current server is acting in the web server role, this information is necessary.
- **Data Server Settings Page:** This page identifies the data server in use and, if applicable, the SQL Server instance name. Whether or not the current server is acting in the data server role, this information is necessary.
- **Client Identification Page:** This page collects client name and Symitar number.
- **SQL Server Reporting Services Page:** This page identifies where the web server will go to get SQL Server Reporting Services. If SQL Server is on a named instance, you will also want to change the Report Server URL.
- **SQL Server Service Accounts Page:** Each service account role requires an Active Directory domain, principal and password. The installer will use the passwords in the installation process, so if the passwords are not valid, the installation will run into difficulty.
  - Click the *Validate Credentials* button for each principal after entering the password. Successful validation is required to move to the next page.
- **SQL Server Mail Page:** An installation has the option of configuring EDS to send notification mail. This page collects the relevant information if that option is chosen.
- **Database Locations Page:** This page collects:
  - The file locations for row and log files for the EDS database.
  - The file locations for row and log files for the SymitarSolutions database.
  - The file locations for row and log files for the SymitarSolutionsUI database.
- **PreInstallation Page:** This page contains tasks that are required to prepare the server and the package for upgrade, using the answers previously collected. You must run all the tasks successfully before you can proceed to the next page.
  - **Verify SSRS Access Task**

This task verifies that the Report Server URL is reachable and responsive during preinstallation. If the URL is not responsive, reports cannot be deployed. If this task fails, go back to the SQL Server Reporting Services page and correct the Report Server URL.
- **Installation Page:** This page contains tasks that are required to upgrade the package on the server. You must run all the tasks successfully before you can proceed to the next page.

- **PostInstallation Page:** This page contains tasks that are required to execute final actions to complete the upgrade. You must run all the tasks successfully before you can proceed to the next page.
- **Install Complete Page:** This is simply a landing page.

## Post-Upgrade Instructions

Reapply all the Symitar schema updates to ensure the SQL databases support your current release of Symitar or higher.

Note: Symitar\_2020.00-2022.01-SDS\_SQL\_Schema\_Updates.sql, on [Jack Henry Downloads](#)

## Resume the ODS Agent

Resume the ODS Agent on the Episys SYM that feeds EDS.

## Start the EDS Database Manager

Start the EDS Database Manager on the windows server.

## Verify the Upgrade

### Look for Specific Issues with Report Deployment

The report deployment step in the installer will fail if it cannot deploy any reports. It will report success even if a specific report cannot be deployed, but it will record the issues in the installation log file. Follow these instructions to check for specific issues:

1. In the installation folder, open the **EDSInstallationLog.txt** file with Notepad++.
- Search (Ctrl+F) for the text "reportscripiter.exe."
- The relevant part of the file follows a few lines down. You are interested in the part beginning with a line like this:

```
2018-06-14 15:19:27,860 INFO - 06/14/2018 03:19:27 PM [Info] The
following options are being used:
```

And ending with a line like this:

```
2018-06-14 15:25:23,830 INFO - Publishing the EDS Reports ...
Complete
```

Here is an example of what you might see if a report fails to publish:

```

2018-06-18 13:17:02,687 INFO - 06/18/2018 01:17:02 PM [Error] Could
not create Catalog Item Portal Audit Report: Soap Exception:
2018-06-18 13:17:02,687 INFO - Error Code: rsProcessingError
2018-06-18 13:17:02,687 INFO - Error Message: More than one report
item in the report has the name `Textbox401'. Report item names must
be unique within a report.

```

Line 1 identifies the report (after the phrase “Catalog Item”) having the issue.

Line 2 gives the SSRS error code.

There will be one or more lines after this that are specific to the error condition. We need to see those lines so that we can fix the problem.

If you find reports failing to publish, open a support case and attach the excerpt of the installation log to it.

## Appendix A: Provisioning Checklist

You need to gather the following items and information before starting the upgrade.

Line	Item	Your Value
	<b>Servers</b>	
1	Data Server Name	
2	Data Server Domain Name	
3	Application Server Name	
4	Application Server Domain Name	
5	Web Server Name	
6	Web Server Domain Name	
7	Reporting Service on:	Check only one: <input type="checkbox"/> Web Server <input type="checkbox"/> Application Server <input type="checkbox"/> Data Server
	<b>SQL Server</b>	
8	Instance name (if not default)	
9	SQL Server Version	
	Client Identification	
10	Symitar Client Number	
	<b>Service Principals: Active Directory user names and passwords</b>	
11	SQL Principal	
12	SSRS Principal	
	<b>EDS Settings</b>	

Line	Item	Your Value
13	EDS Installation Drive	
14	EDS Log Drive	
15	Branch Description Source	<input type="checkbox"/> Name <input type="checkbox"/> Extra Address
	<b>Database Storage Locations: Folders on the data server where database files will be kept</b>	
16	Database Rows (.mdf)	
17	Database Logs (.ldf)	
	<b>For Clustered Data Servers only</b>	
18	DNS Name of the Cluster	
	<b>If EDS Notification Email is to be used</b>	
19	Notification sender mail address	
20	SMTP Server to originate email	

## Existing Database Storage Locations

For an upgrade, you should already have the data stored in defined locations. You can find the locations of the existing data and log files with this SSMS query:

```
USE [master];
GO

SELECT d.name, f.type_desc, f.folder
FROM (
    SELECT database_id, type_desc,
           [folder] = SUBSTRING(physical_name, 1,
                               LEN(physical_name) - CHARINDEX('\', REVERSE(physical_name)))
    FROM sys.master_files
) f
JOIN sys.databases d
    ON d.database_id = f.database_id
JOIN (
    SELECT name
    FROM ( VALUES
          ( 'EDSDB' ),
          ( 'SymitarSolutions' ),
          ( 'SymitarSolutionsUI' )
        ) AS t ( name )
) dn
    ON d.name = dn.name
GROUP BY d.name, f.type_desc, f.folder;
```

## Appendix B: Installer Pages with Prompts

This appendix shows all the pages in the installer with descriptions and sample graphics.

**TIP**

The page-by-page sample graphics include a red number if the information for input reference a row number in Appendix A: Provisioning Checklist.



# Installation Type Page

The page looks like this:

EDS Configuration Center

## Installation Type

EDS

Welcome

**Installation Type**

Setup Requirements

EDS Settings

Web And Application Servers

Data Server

Client Identification

SQL Server Reporting Services

SQL Server Service Accounts

SQL Server Mail

Database Locations

PreInstallation

Installation

Post Installation

Install Complete

Today the purpose is to: Upgrade

The role of this server:  
(check all that apply)

☐ Web Server

☐ Application Server

☒ Data Server

What version of SQL Server is in use? SQL Server 2019

☐ Data Server is clustered

☐ This server is hosted

The domain of this server is: arcu.dev

Special Functions

☐ Only publish databases

☐ Do not run pre-install injected tasks

Installation Log Version 2020.0.0.149402

< Back Next > Close

**Purpose:** Select **Upgrade**.

**Server Roles:** Select the server you are upgrading.

- **Web Server:** This server provides EDS web services, while another server stores EDS databases and applications.
- **Application Server:** This server performs the functions of a Data Server Application server and a Web server.
- **Data Server:** This server stores EDS databases and applications, while another server provides ARCU web services.

### TIP

For a single server upgrade, check Web Server, Application Server and Data Server. For a dual server upgrade, check Data Server for the database server upgrade and Web Server and Application Server for the web server upgrade.

**SQL Server Version:** Choose the SQL server version to install on your ARCU server.

If the data server is clustered, select the **Data Server is clustered** check box.

The box showing the domain of the current server is for your information. You cannot change its contents.

**Special Functions:** For future use; non-applicable for release 2022.0

## EDS Settings Page

There are multiple panes on this page. You move between panes by clicking on the label on the left for each pane. The following image shows the page that appears when you select EDS Directories:

EDS Configuration Center

### EDS Settings

EDS

- Welcome
- Installation Type
- Setup Requirements
- EDS Settings**
- Web And Application Servers
- Data Server
- Client Identification
- SQL Server Reporting Services
- SQL Server Service Accounts
- SQL Server Mail
- Database Locations
- PreInstallation
- Installation
- Post Installation
- Install Complete

**EDS Installation**

Drive: C:\ Full Path: C:\EDS\

**EDS Log**

Drive: C:\ Full Path: C:\EDS\Logs\

**Branch Description Source**

Name

Installation Log Version: 2020.0.0.149402

< Back Next Close

The drive combo boxes will populate with all the drives that show as directly attached to the server.

In the **Drive** field under EDS Installation, choose the drive identified on line 11 of the *Provisioning Checklist*.

In the **Drive** field under EDS Log, choose the drive identified on line 12 of the *Provisioning Checklist*.

At the **Branch Description Source** combo box, you must choose the source of the branch description.

## Web And Application Server Settings Page

This identifies the EDS web server.

EDS Configuration Center

### Web And Application Servers

EDS

- Welcome
- Installation Type
- Setup Requirements
- EDS Settings
- Web And Application Servers**
- Data Server
- Client Identification
- SQL Server Reporting Services
- SQL Server Service Accounts
- SQL Server Mail
- Database Locations
- PreInstallation
- Installation
- Post Installation
- Install Complete

**Web Server**

Domain

arcu.dev

Machine Name

arcusql2019-web

Fully Qualified Domain Name

arcusql2019-web.arcu.dev

**App Server**

Domain

arcu.dev

Machine Name

arcusql2019-web

Fully Qualified Domain Name

arcusql2019-web.arcu.dev

Installation Log Version 2020.0.0.149402 < Back Next Close

If both the Web Server and Application Server roles are selected, the App Server section will be disabled, because the same answers for the Web Server section will apply for the App Server.

## Data Server Settings Page

This identifies the EDS data server. Additionally, if you are using a named instance of SQL Server, you provide it here.

EDS Configuration Center

### Data Server

EDS

- Welcome
- Installation Type
- Setup Requirements
- EDS Settings
- Web And Application Servers
- Data Server**
- Client Identification
- SQL Server Reporting Services
- SQL Server Service Accounts
- SQL Server Mail
- Database Locations
- Preinstallation
- Installation
- Post Installation
- Install Complete

**Data Server**

Domain: arcu.dev **2**

Machine Name: arcusql2019-0 **1**

Fully Qualified Domain Name: arcusql2019-0.arcu.dev

Instance:

- ☒ Default **8**
- ☐ Named

**Data Server Cluster**

DNS name of the cluster: arcu-cluster.arcu.dev **18**

☐ Current node is cluster primary node

Installation Log Version: 2020.0.0.149402

< Back Next Close

If you selected the **Data Server is clustered** box on the *Installation Type* page, the Data Server Cluster section is enabled. In this case, the DNS name of the cluster text box requires input. Select the **Current node is cluster primary node** check box if this node is currently the primary node of the cluster.

## Client Identification Page

EDS Configuration Center

### Client Identification

EDS

- Welcome
- Installation Type
- Setup Requirements
- EDS Settings
- Web And Application Servers
- Data Server
- Client Identification**
- SQL Server Reporting Services
- SQL Server Service Accounts
- SQL Server Mail
- Database Locations
- PreInstallation
- Installation
- Post Installation
- Install Complete

Client Name: SymitarSolutions

Symitar #: 0

10

? Installation Log Version 2020.0.0.149402 < Back Next Close

Verify that the values in the **Client Name** and **Symitar #** fields are correct.

## SQL Server Reporting Services Page

The application needs the URL for SQL Server Reporting Services. For a default instance of SQL Server, this will usually be <http://server.domain/ReportServer>.

However, if your data is on a named instance of SQL Server, your SSRS URL will probably have a different name that incorporates the instance name.

EDS Configuration Center

### SQL Server Reporting Services

EDS

- Welcome
- Installation Type
- Setup Requirements
- EDS Settings
- Web And Application Servers
- Data Server
- Client Identification
- SQL Server Reporting Services**
- SQL Server Service Accounts
- SQL Server Mail
- Database Locations
- PreInstallation
- Installation
- Post Installation
- Install Complete

Report Server URL

SSRS resides on the WebServer Suggest URL

☐ Use HTTPS to SSRS Test Connection

☐ ReportServer is PowerBI server

☐ Publish menus on local host

Validate

Installation Log Version  < Back Next > Close

For a multi-server implementation, this is where you tell the installer what server is providing SQL Server Reporting Services. For a single-server implementation, any choice has the same net effect.

The **Validate** button only checks to ensure that the Report Server URL is filled in and looks like a URL.

The **Test Connection** button is entirely optional. If you click it, the installer will try to connect to the Report Server URL the same way that it will later in the various tasks. This could take some time, particularly if the SSRS service has not been active since the server booted.

## SQL Server Service Accounts Page

On this page, you provide the Active Directory principals, with domains and passwords, that you have collected on the provisioning checklist. Make sure that you enter a password for each of the two principals and validate them successfully, even if any of them are repeated.

The screenshot shows the 'SQL Server Service Accounts' page within the 'EDS Configuration Center'. On the left, a navigation menu lists various setup steps, with 'SQL Server Service Accounts' highlighted. The main area displays two service accounts: 'SQL' and 'SSRS'. The 'SQL' account is marked with a green checkmark, indicating successful validation. The 'SSRS' account is marked with a blue question mark, indicating it needs configuration. To the right of the 'SQL' account, there are input fields for 'Domain' (containing 'MMOEDSQASTAGE'), 'User' (containing 'svcEDSSQL'), and 'Password' (masked with asterisks). A red circular badge with the number '11' is overlaid on the 'User' field. Below these fields is a 'Validate Credentials' button. At the bottom of the window, there is an 'Installation Log' button, a 'Version' field showing '2018.0.1.1', and navigation buttons for '< Back', 'Next', and 'Close'.

As you progress through the principles, those that have successfully validated will be indicated with a green checkmark on the left hand side.

Domain:

User:  12

Password:

After entering and validating both principals, you can proceed the next page.

## SQL Server Mail Page

Select the **Enable** check box if you want to configure EDS notification email. The two text fields will be enabled for input.

EDS Configuration Center

### SQL Server Mail

EDS

Welcome

Installation Type

Setup Requirements

EDS Settings

Web And Application Servers

Data Server

Client Identification

SQL Server Reporting Services

SQL Server Service Accounts

**SQL Server Mail**

Database Locations

PreInstallation

Installation

Post Installation

Install Complete

Data Notification Mail

☒ Enable

Sender Address  19

SMTP Server  20

Installation Log Version: 2022.0.0.271364 < Back Next Close



## Database Locations Page

This page collects the folders in which to store data and log files for each database under separate tabbed control. Each database has its own pair of data and log file locations. When upgrading, these paths should display the current locations that correspond with your data and log file paths.

EDS Configuration Center

### Database Locations

EDS

- Welcome
- Installation Type
- Setup Requirements
- EDS Settings
- Web And Application Servers
- Data Server
- Client Identification
- SQL Server Reporting Services
- SQL Server Service Accounts
- SQL Server Mail
- Database Locations**
- PreInstallation
- Installation
- Post Installation
- Install Complete

EDSDB SymitarSolutions SymitarSolutionsUI

EDSDB Database

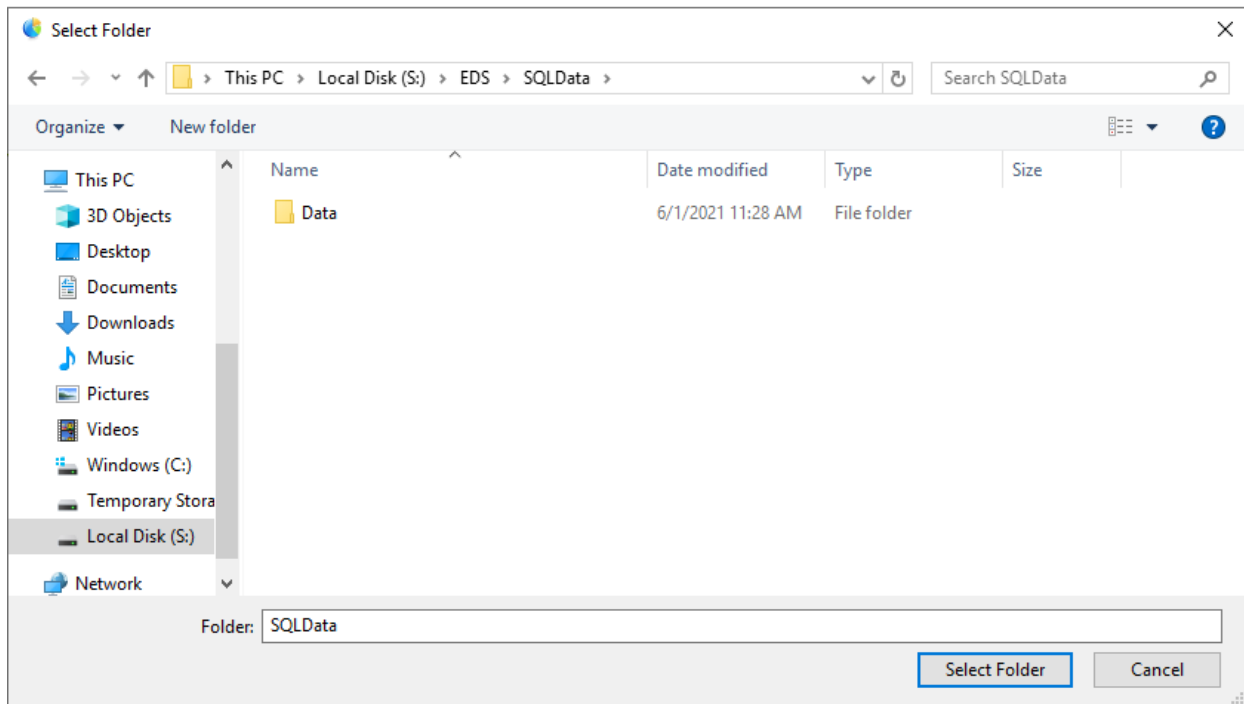
Rows File (.mdf) Location **16**  
S:\EDS\SQLData\Data\ Browse

Log File (.ldf) Location **17**  
S:\EDS\SQLData\Data\ Browse

\* If the location specified does not exist it will be created.

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First, click the **Browse** button to get the standard Windows® folder browser dialog box. Select the folder where each database and log file should exist. If you receive an error, verify that your path has the backslash (\) at the end of the path name. You will need to go through each tab to configure each of the EDS databases.



## Appendix C: Server Roles and Product Functionality

This section locates where the product functionality resides by server role.

### Data Server

- All databases, including their stored procedures and functions
- The SQL Server Agent and definitions of SQL Server Agent jobs
- The CalendarDates program (the EDSInstaller needs it)

The Episys ODS Agent inserts rows directly into the EDSDB database on the data server.

### Application Server

- The EDSDatabaseManager service
- The EDSCounters program, which the installer needs to prepare performance counters when installing the EDSDatabaseManager
- The CalendarDates program

## Web Server

These web applications:

- The EDS portal
- The Security Manager portal
- EDSPages
- EDS Help
- The EDS Data Dictionary
- The Security Administration Service