User Manual

Installing and upgrading Help

SimCorp Solutions
Based on version 19.04
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SimCorp

If you have any comments to the contents of this document or suggestions for topics to be included in a future updating of this document, please do not hesitate to send them by mail to: SCDimension.doc@SimCorp.com.

Contents

1 The SimCorp Dimension Help upgrade history

From SimCorp Dimension 19.04 and later, you can enable cloud-based Help. With cloud-based Help you no longer need to download and install the Help locally. Instead, you will always access the latest version of the Help. For more information, see Enable cloud-based Help on page 10.

From SimCorp Dimension 6.41 and later, the PDF version of the User Manuals will no longer be available from the SimCorp Customer Portal. Release documents and Technical documents will still be available. To access the User Manuals you must install the Help as described in this document.

From SimCorp Dimension 6.0 and later, the Help is not installed as part of the upgrade or installation. Instead, you must install the help after the upgrade or installation is complete.

From SimCorp Dimension 5.9 and later, the Help is delivered in HTML5 format. You also can send feedback to SimCorp from any topic if you have general or specific issues with the Help.

From SimCorp Dimension 5.5 and later you can also:

- Install the Help once on a Microsoft IIS web server and access it from several SimCorp Dimension installations of the same version. You have a number of options when installing the Help on a Microsoft IIS web server:
  - Use a dedicated IIS server for the SimCorp Dimension help. The Help is installed in the **Default Web Site**.
  - Use an existing IIS web server for the SimCorp Dimension help. The Help is installed as a **New Application** in the **Default Web Site**.
  - Other methods include installing in a **Virtual directory** or installing in a **New Web Site**. These methods are not covered in this document.

From SimCorp Dimension 5.3 and onwards, the Help is delivered in a new format and uses a new delivery mechanism which allows you to:

- Update context sensitive (CSH) help and user manuals more frequently instead of once per release of SimCorp Dimension.
- Install the Help once in a separate folder on a file share of your choice and access it from several SimCorp Dimension installations of the same version.

You can optionally Specify the location for the Help.

At a later time, you can Download a Help update.

To install the Help in a new location or install an update of the Help, see Install Help updates on page 11.

2   Prerequisites for the Help

If you want to run the Help from a web server:

The following requirements must be met before you can install the Help locally on a web server, either as part of an upgrade or installation or when installing an updated Help package:

- Microsoft IIS web server must be installed
- A directory for the Help must be created on the web server
- A (Web) Site for the Help must be created on the web server

If you want to run help from a file share:

The following requirements must be met before you can install the Help locally in a file share, either as part of an upgrade or installation or when installing an updated Help package:

- File share must be created
- A security zone must set up correctly. See, Security Settings in Internet Explorer on page 13.
- All users that need to access the Help must have Read(R) and List(L) access to the installation location.

Note   Due to the size and architecture, it is highly recommended to install the Help on a web server. File share installations tend to be noticeably slower to open, to search, and to navigate!

Requirements for both web server and file share:

- The person who runs the installation must have write access to the installation location.
- The server must have sufficient space for the Help.

    The Help consist of a large number of small topics, so the Size on disk depends on the block size used on the server. At a block size of 4096 bytes, the size on disk is approx. 2.5 GB. A block size of 8192 bytes will cause the Help to use approx. 3.5 GB on disk.

2.1   Create directories on the IIS web server

No matter if you use a dedicated web server or create a new site on an existing web server, you must follow the steps below, to create the directories needed and set up the access rights.

1. Create a folder structure on the IIS Server, containing a sub directory named **..\Help** where the Online Help files can be placed. For example **D:\onlinehelp\Help**.

2. The parent folder of **..\Help** must be shared to allow SimCorp Dimension to add and overwrite the online help files. For example share the folder **D:\onlinehelp**

3. Grant folder access rights on the folder **..\Help** as listed in the below table.

Folder Name	SimCorp Dimension Admin account for updating the Online Help files	Internet Guest Account IIS_IUSRS (<IIS Server name>\IIS_IUSRS)
Help	MXLRW	XLR

Note	Permission:
	M = Modify
	X = Read & Execute
	L = List folder contents
	R = Read
	W = Write

2.2   Configure IIS for the Help

Follow these steps to create a site for the Help in the **Default Web Site** or as a **New Application** in the **Default Web Site**.

Note	Different versions of Microsoft Windows Server comes with different versions of IIS. For more information, please refer to the relevant documentation from Microsoft.

3 Specify the location for the Help

You can install the Help locally in a location of your choice. For example, on a web server or a folder in a file share where several SimCorp Dimension installations of the same version can access the Help.

Note   Due to the size and architecture, it is highly recommended to install the Help on a web server. File share installations tend to be noticeably slower to open, to search, and to navigate!

Read the Prerequisites for Help before changing the Help location and installing the Help.

To specify the location of the Help, repeat these steps for each SimCorp Dimension installation that access the Help in its new location:

1. Log on to SimCorp Dimension as **System Administrator** or a user who is authorised to change settings in the **System Environment Configuration** window.

2. Open the **System Environment Configuration** window on the **Directories** tab.

3. Enter the path to the Help's location:

   A. To install the Help in a file share:

      I. In the **Installation Directory** field, enter the UNC path to the help. For example, `\[ServerName]\Fileshare\..\..\Help`.

   B. To install the Help on a web server:

      I. In the **Installation Directory** field, enter the UNC path to the help. For example, `\\Server001\Help\61`.

      II. In the **URL address** field, enter the URL path to the help. For example, `http://Help/61/`.

4. Close SimCorp Dimension.

To complete the procedure that changes the location for the Help, you must re-install the Help, see Install Help updates on page 11.

4   Download a Help update

Note	This procedure is only relevant if your Help is installed in a file share or web server hosted by your own company.

SimCorp regularly publishes updates of the Help. You can download the Help installation files from the FTP/Secure File Share on the Customer Support.

There is one Help installation file called ScdHelpPackage.exe per language. To ensure correct installation, you must download and save each file in a separate sub-folder named **HelpFiles**. For example, use these locations:

- **\\Fileshare\scdhelp\en\HelpFiles**
- **\\Fileshare\scdhelp\de\HelpFiles**
- **\\Fileshare\scdhelp\fr\HelpFiles**

For more information about installing the Help update, see .

5   Enable cloud-based Help

You can use the cloud-based Help for SimCorp Dimension, instead of a locally installed Help. The cloud-based Help gives you multiple advantages:

- You no longer need to download and install the SimCorp Dimension Help locally.
- You always see the latest version of the Help, published by SimCorp.
- You will get more frequent Help updates.

Note	Company Notes do not work when using the cloud-based Help.

Note	To use the cloud-based Help, your SimCorp Dimension installation must be configured to connect to the cloud. For more information, see [Five steps for getting connected to the cloud]().

To enable the cloud-based Help, once the cloud connection has been configured:

1. Open the **System Environment Configuration** window.
2. Select the **Directories** tab
3. Select **Enable cloud-based Help**.

Your SimCorp Dimension users must restart SimCorp Dimension for changes to take effect.

6   Install Help updates

Note   This procedure is only relevant if your Help is installed in a file share or web server hosted by your own company.

You can update the Help after downloading a Help update. See Download a Help update on page 9 for further instructions.

Note   If you Specify the location for the Help, you must update the Help after changing the path in the **System Environment Configuration** window.

Ensure the following requirements are met before updating the Help:

- The latest self-extracting Help installation files (ScdHelpPackage.exe) have been downloaded.

  Note that there is one installation file per Help language.

- All SimCorp Dimension installations of the same version that access the updated Help point to the same correct location, see Specify the location for the Help on page 8 for further instructions.

Note   It can take up to two hours to update the Help. You cannot use the SimCorp Dimension instance during the update.

During the installation, make sure that no users are using the Help, because doing so will block access to the files and cause the update or installation to fail.

To update the Help, follow these steps:

1. Start SimCorp Dimension and log on as **System Administrator**.
2. Open the **Maintenance** > **System Maintenance** > **Installation Administration** > **Install Documentation and National Files** window.
3. Select the language-specific parent folder of the Help package.

   For example, if the English Help package is stored in the **\\Fileshare\scdhelp\en\HelpFiles** folder, select the folder **en**.

   Note   The language alias en, de, and fr in the path are case sensitive and must be lower-case.

4. In the **Import [Language] Help Files** dialog, select **Import help files**, and click **OK**.

Optional - Install Help files manually

The Help files can be installed manually from a Windows command prompt, but be aware of the following warning:

Warning	The built-in language and version control checks will not be executed, if you extract the Help files by using other tools. So you must ensure to install the correct Help version and language in the appropriate folder.

To install help files manually:

1. Copy the Help installation file (ScdHelpPackage.exe) to the destination directory.

   For example: `\[ServerName]\Fileshare\..\..\Help` or, if you install the Help on a web server: `\[WebServerName]\SitePath\` .

2. From a Windows command prompt, go to the destination directory.

3. Extract the Help installation file by using the following command:

   `ScdHelpPackage.exe -dir`

7   Security Settings in Internet Explorer

Besides the content (html) files, the Help includes a number of jscript files, which control the Help user interface, search, and table of contents.

Depending on your current security settings in Internet Explorer and the location of the Help, the Help opens in one of the following Internet Explorer Security zones:

- Local Intranet
- Trusted sites

To ensure that users can access and use the Help, the following Internet Explorer security settings must be set in the security zone that is used:

- Run ActiveX controls and plug-ins: **Enable**
  - By default this option is set to Enable in the Local Intranet and Trusted sites zones in Internet explorer.
  - If this option is set to **Disable**, the Help will not display.
  - If this option is set to **Prompt**, the users will get the following message: "You want to allow software such as ActiveX and plug ins to run?".

8   Appendix

8.1   Minimum required IIS Role Services

The IIS role services that are required as a minimum for the Help are displayed in the following screen shot.
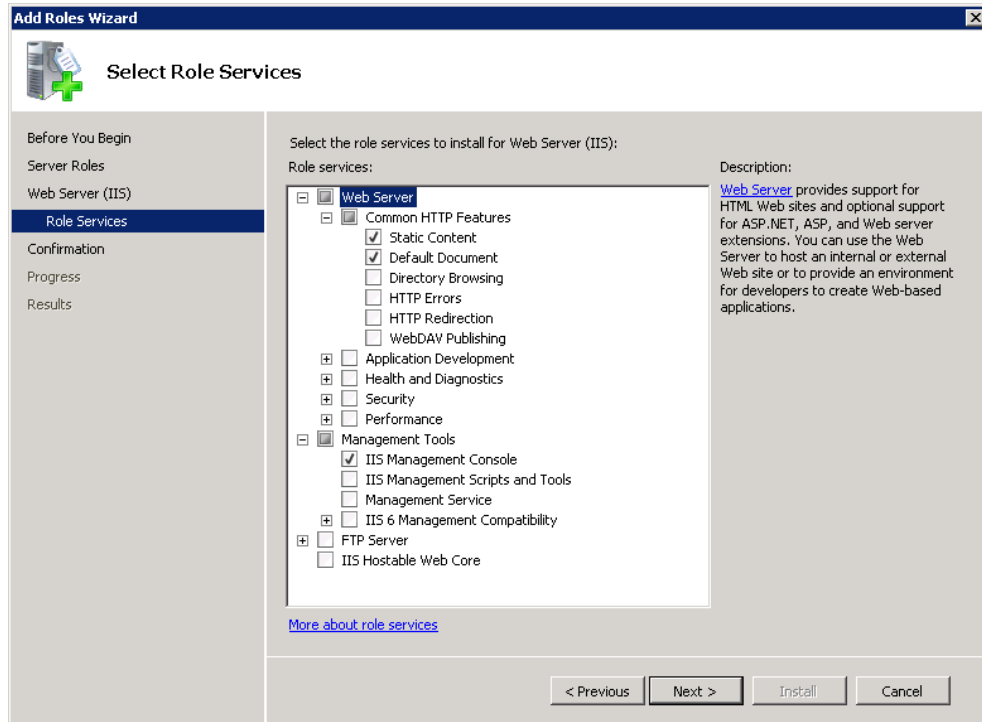
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