Synergi Enterprise Performance Management

Installation Procedures

# Server and Client Requirements

## Refer to the document Tune - Synergi Installation Procedures - Client.docx for details.

# Pre-installation Requirements

* Synergi license number (provided by Synergi Team).
* Synergi Installation Package.

# Installation Workflow

This will describe the workflow between Ken and Synergi Team to do the first installation.

|  |  |  |
| --- | --- | --- |
| **Step** | **PIC** | **Description** |
| 1 | Ken | * Set up all server requirements (hardware and software). * Refer to “Tune - Synergi Installation Procedures - Client.docx” |
| 2 | Synergi Team | * Provide Installation Package: empty databases and scripts. |
| 3 | Ken | * Install Synergi databases. |
| 4 | Ken | * Create web site and provide public domain/IP. * Provide FTP account to WebFolder (read/write permissions). |
| 5 | Ken | * Install Background services. |
| 6 | Synergi Team | * Copy website files to WebFolder using FTP account provided by Ken. * Change necessary information in configuration file in WebFolder. |
| 7 | Synergi Team | * Go to website url to install initialized data. |
| x |  | * Start to use. |

# Installation Reference

## Step 3: Database Installation

* Restore the empty Synergi database.
  + Restore db from empty db backup.
  + Run \_01\_Synergi\_Structure.sql
* Restore the empty Competition database.
  + Restore from the empty Competition database.
  + Run \_09\_Competition\_Structure.sql

## Step 4: Web site Installation

* Deploy to the server as an asp.net 4.0 application (set application pool is in Integrated mode).
* Make sure Default.aspx is in the list of default start pages.
* Provide “write” permission to the folder /Logs to “Network Service” account.

## Step 5: Background Services Installation

* SynergiBackgroundServices is in folder InstallationPackage\BackgroundServices.
  + Stop and unregister the current service by using uninstall.bat.
  + Run Installer.
  + Change connection string in .config file.
  + Register and start the new service by using install.bat

# Synergi Systems Installation

## Environment Checking

* In Web server
  + Connection to database server.
  + Connection to CRS API.
  + FTP account to WebFolder (read/write).
* Copy InstallationPackage\Web to the Web server folder.
* Copy InstallationPackage\(others) to the Database server folder.

## Database Installation

* Restore the empty Synergi database.
  + Restore db from empty db backup.
  + Run \_01\_Synergi\_Structure.sql
* Restore the empty Competition database.
  + Restore from the empty Competition database.
  + Run \_09\_Competition\_Structure.sql

## Website Installation

* Website installation.
  + Change necessary information in web.config.
  + Deploy to the server as an asp.net 4.0 application (set application pool is in Integrated mode).
  + Make sure Default.aspx is in the list of default start pages.
* Get license number and put in settings to activate:
  + Go to website, log in as PortalAdmin.
  + Input license number.
  + Go to PortalAdmin page, change organization information and create OrgAdmin user.
* Login as OrgAdmin:
  + Create sitegroup
  + Create a new site
    - Input needed information for site.
    - Run \_09\_Synergi\_Empty\_LinkSite.sql
    - Create a GM for the site:
      * Create new employe (FirstName, LastName, Account info).
      * Assign GM and Security Admin roles (and with the default “Roster Member” role ).
* CRS Connectivity through Synergi Publishers.
  + Go to the page Administration/Publisher Administration.
  + Activate publishers for each Site.
  + Setup publisher parameters.

## Background Services Installation

* SynergiBackgroundServices is in folder InstallationPackage\BackgroundServices.
  + Stop and unregister the current service by using uninstall.bat.
  + Run Installer.
  + Change connection string in .config file.
  + Register and start the new service by using install.bat