

# SmartPlant Fusion

## Installation and Configuration Checklist

### Version 2016 R1 (4.1)

This checklist of common activities and requirements presents a concise summary of the installation and setup process for SmartPlant Fusion. It is not a replacement for the product documentation and is provided as a convenience. Your installation and setup requirements may vary from what is presented here. You may customize a copy of this checklist to capture a summary of your own installation and setup process.

Unless otherwise specified, the topics listed in the **Additional Resources** column can be found in the *SmartPlant Fusion Installation and Configuration Guide*.

Task No.	Tool	Task Step	Comments	Additional Resources	Notes
<b>Install and Configure the Software</b>					
<b>1.0</b>	<b>SmartPlant Fusion</b>	<b>Setting up a SmartPlant Fusion Server</b>	<b>SmartPlant Fusion must be installed on top of an existing SmartPlant Foundation installation on its application server.</b>	<b>SmartPlant Fusion Hardware and Software Recommendations</b>	
1.1		Install prerequisite software	Install SmartPlant Foundation and recommended software.	SmartPlant Foundation Installation and Setup Guide	
1.2		Install SmartPlant Fusion on the application server.	Client components can also be installed on the application server in case you would like to use the server as a client machine also.	Setting up the SmartPlant Fusion Server > Install SmartPlant Fusion	
1.3		Create a SmartPlant Fusion site in Server Manager.	Before you begin creating your site, copy the URL of the license server.	Configuring SmartPlant Fusion Site in Server Manager > Create a new SmartPlant Fusion site	
1.4		Configure a SmartPlant Fusion site in Server Manager.		Configuring SmartPlant Fusion Site in Server Manager > Configure a SmartPlant Fusion site	
<b>2.0</b>	<b>SPF</b>	<b>Configuring Vaults</b>		<b>Configuring vaults</b>	
2.1		Set up a host.			
2.2		Create an external company.			
2.3		Relate the company to the new host.			
2.4		Create a new vault on the host.			
2.5		Relate the SmartPlant Fusion vault, SmartPlant Foundation vault, and the TruViewIntegrator vault to the new host.			
<b>3.0</b>	<b>SmartPlant Fusion</b>	<b>Setting up a SmartPlant Fusion Workstation</b>	<b>SmartPlant Fusion must be installed with an existing SmartPlant Foundation Desktop Client installation on a client workstation.</b>	<b>SmartPlant Fusion Hardware and Software Recommendations</b>	
3.1		Install prerequisite software.	Install SmartPlant Foundation and recommended software.	SmartPlant Foundation Installation and Setup Guide.	
3.2		Install SmartPlant Fusion Client on the client computer.	The SmartPlant Fusion web portal configuration is not required for Smart Enterprise Portal.	Installing a SmartPlant Fusion Workstation	
<b>Configure SmartPlant Fusion Database for Using Data Reader Patterns</b>					
<b>4.0</b>	<b>SmartPlant Fusion</b>	<b>Configure Oracle Database Server for using Data Reader Patterns</b>	<b>If you are using SQL Server as your database software, skip this set of tasks.</b> <b>You do not need to load the database scripts for viewing data in Smart Enterprise Portal.</b>	<b>Setup the SmartPlant Fusion Database for Using Data Reader Patterns</b>	
4.1		Use the <b>Load Database Scripts</b> option in Server Manager to load the database scripts.			
4.2		Type the database user credentials to connect to the database.			
<b>5.0</b>	<b>SmartPlant Fusion</b>	<b>Configure SQL Database Server for using Data Reader Patterns</b>	<b>If you are using SQL Server as your database software, the database is set up by clicking on the Load Database Scripts option.</b> <b>You do not need to load the database scripts for viewing data in Smart Enterprise Portal.</b>	<b>Setup the SmartPlant Fusion Database for Using Data Reader Patterns</b>	
<b>Set Up a Web Portal</b>					

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Task No.	Tool	Task Step	Comments	Additional Resources	Notes
6.0	SmartPlant Fusion	Configure a new SmartPlant Fusion web portal		Configuring SmartPlant Fusion Web Portal in Server Manager > Configure a new SmartPlant Fusion web portal	
6.1		Create a new Web Portal site in Server Manager.			