Smart Data Validator
Installation Checklist

Version 2018 (3.0)

This Smart Data Validator checklist of common activities and requirements presents a concise summary of the installation and setup process for Smart Data Validator. It is not a replacement for the product installation 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 *Smart Data Validator Installation and Setup Guide* .

Task No.	Tool	Task Step	Comments	Additional Resources	Notes
			Set up the Database Server for Smart Data Validator		
1.0	**RDBMS**	**Set up the Database Server for Oracle**	**Smart Data Validator database server has the same hardware and software requirements as SmartPlant Foundation. For more information on SmartPlant Foundation hardware and software recommendations, see the** *SmartPlant Foundation Installation and Setup Guide* **delivered with SmartPlant Foundation software. Please refer to your Oracle Server product documentation for information on configuring your database server hardware.**	**Intergraph recommends Oracle Enterprise for improved performance and scalability, particularly in an integrated environment.**	
1.1		Install **Oracle**.	Install Oracle Server and Client on the database server. Create an alias for the database.		
1.2		Create an Oracle instance.	There is no need to create any table spaces at this time.		
2.0	**RDBMS**	**Set up the Database Server for SQL Server**	**Smart Data Validator database server has the same hardware and software requirements as SmartPlant Foundation. For more information on SmartPlant Foundation hardware and software recommendations, see the** *SmartPlant Foundation Installation and Setup Guide* **delivered with SmartPlant Foundation software. Please refer to your Microsoft SQL Server product documentation for information on configuring your database server hardware.**	**Configure database settings**	
2.1		Install **Microsoft SQL Server Management Studio**.			
2.2		Ensure all necessary SQL Server services are running.	There is no need to create a new database at this time.		
			Set up the Application Server for Smart Data Validator		
3.0	**SPF**	**Install Prerequisite Software on the Application Server**	**Smart Data Validator application server has the same hardware and software requirements as SmartPlant Foundation. These components must be installed as a prerequisite for all installations of Smart Data Validator.**	**The SmartPlant Foundation Hardware and Software Recommendations section located in the SmartPlant Foundation Installation and Setup Guide.**	
3.1		Install the prerequisite software recommended for SmartPlant Foundation.	Apply the most recent security patches and updates.		
4.0	**SPF/SDV**	**Install Smart Data Validator Software on the Application Server**	**Smart Data Validator application server must be installed on a SmartPlant Foundation application server. This is a summary of the software installations required. Refer to the SmartPlant Foundation Installation and Setup Guide for detailed information.**	**SmartPlant Foundation Installation and Setup Guide and Smart Data Validator Installation and Setup Guide.**	
4.1		Install **SmartPlant Foundation** and all required components for an Application Server.	These components must be installed as a prerequisite for all installations of Smart Data Validator.	SmartPlant Foundation Installation and Setup Guide > Setting Up the Application Server > Installing Software on the Application Server	
4.2		Install **Smart Data Validator**.	Run the Smart Data Validator installation setup and install the **Server** component from the list of features.	Smart Data Validator Installation and Setup Guide > Installing Smart Data Validator > Install Smart Data Validator application server	

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5.0	**SPF**	**Create a Smart Data Validator site**	**Use Server Manager to create a new site.**	**Configuring the Smart Data Validator Application Server > Set up the Smart Data Validator site in Server Manager**	
5.1		Create a new **Smart Data Validator site** using Server Manager.	Right-click the **SmartPlant Foundation Sites** node in the tree view, and click **SDV > Create new SDV site**. The site must be a primary site. For Oracle databases, when prompted by the wizard, enter the name of your **Index Tablespace**.	Configuring the Smart Data Validator Application Server > Set up the Smart Data Validator site in Server Manager > Create a new Smart Data Validator site	
5.2		Modify the **Smart Data Validator site** settings.	Ensure that the new SDV node has the **Is SDV Configured?** property set to **Yes**.	Configuring the Smart Data Validator Application Server > Set up the Smart Data Validator site in Server Manager > Modify the Smart Data Validator site settings	
6.0	**SPF/SPLM**	**Install Software on the License Server**	**SmartPlant Foundation uses SmartPlant License Manager for license management. Smart Data Validator License server has the same hardware and software requirements as SmartPlant Foundation.**	**SmartPlant Foundation Hardware and Software Recommendations; Setting Up a SmartPlant Foundation License Server and SmartPlant License Manager Installation and User's Guide.**	
6.1		Install the **SmartPlant License Manager Client** software.			
6.2		Configure the License Server by running **Server Manager** to define the server default folder.	Run scripts to also create application pools and users.		
6.3		Grant permissions.	Permissions are set automatically if the scripts are allowed to run.		
6.4		Set the site's **SPFLicenseURL** property to the URL of the License Server.	If the site is created on the Application Server and after the License Server is set up, the property is set automatically.		
6.5		Configure the **SPLM client software** to communicate with the SPLM Server.	Refer to the *SmartPlant License Manager Installation and User's Guide* for details.		
7.0	**RDBMS**	**Configure database settings**	**Once the site is created and configured, you need to make some modifications to your database settings.**	**Configuring the Smart Data Validator Application Server > Configure database settings**	
7.1		Increase database timeout setting.	Modify the SDV site setting **DBCommandTimeoutSeconds** property.		
7.2		Modify the **web.config** file to support large jobs.	Set **closeTimeout**, **openTimeout**, **receiveTimeout**, and **sendTimeout** from the default 10 minutes ("00:10:00") to at least 59 minutes ("00:59:00").		
		Set up the Target System with SmartPlant Foundation			
8.0	**SPF**	**Set up a target system**	**A target system is a defined database system that can be the export destination for any validated data imported into Smart Data Validator, as well as the system on which all import mappings, validation rule sets, and export mappings are based.**	**Configuring SmartPlant Foundation as a Smart Data Validator Target System**	

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8.1		Install the **SDV** > **Target System Adapter** component.	Run the SDV setup and install the **Target System Adapter** from the list of features. You must ensure that the target system adapter is installed to configure a site as a target system.	Smart Data Validator Installation and Setup Guide > Installing Smart Data Validator > Install Smart Data Validator target system adapter	
8.2		Set up a target site in **Server Manager**.	Right-click the node for the site that is to serve as a target system for SDV and click **SDV > Configure SDV Target System Adapter**. Click **Yes** to run data scripts. This is only required for Oracle.		
8.3		Modify the target system site settings.	Ensure that the **Is Target System Adapter Configured?** property is set to **Yes**.		
8.4		Configure runtime execution timeout in the **web.config** file.	The parameter **httpRuntime executionTimeout** in the web.config file specifies the time after which Internet Information Services (IIS) closes and the export stops. To allow more time for the export to be completed, modify the **httpRuntime executionTimeout** value in the web.config file on the target system site.		
8.5		Configure the target system scheduler.	To load the configuration files into the target system, use the loader in SmartPlant Foundation Desktop Client to process the load files **ADMIN_VTLExportTask.xml** and **SCHEMA_VTLExportTask.xml**. The dedicated VTLExportTaskScheduler is separate from the existing scheduler in SmartPlant Foundation Desktop Client, as it polls only for export and implicit delete jobs in Smart Data Validator Job Management. You must recycle the configuration service application pools after configuring the scheduler.		
		Set up the Client for Smart Data Validator			
9.0	**SPF**	**Install prerequisite software on the Client Workstation**	**Smart Data Validator client must be installed on a work station with SmartPlant Foundation Desktop Client installed and uses the same prerequisites for all installations of Smart Data Validator.**	**SmartPlant Foundation Installation and Setup Guide > Setting Up the Application Server > Installing Software on Client Workstations**	
9.1		Install all prerequisite software. Smart Data Validator client has the same software requirements as SmartPlant Foundation.			
9.2		Install **Microsoft Office 2010**, **2013**, or **2016**.	32-bit only. Smart Data Validator uses Microsoft Excel 2010, 2013, or 2016. Required to view validation and implicit delete reports.		
10.0	**SDV**	**Install Smart Data Validator Software on the Client Workstation**		**Smart Data Validator Installation and Setup Guide**	
10.1		Install the **SDV Client** component.	Run the Smart Data Validator installation setup and install the **Client** from the list of features.		
		Optionally Configure Smart Data Validator for Converting an Object into a Job			

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11.0	**SPF**	**Configure Smart Data Validator for Converting any SmartPlant Foundation Object into an SDV Job**	**Smart Data Validator allows the conversion of SmartPlant Foundation objects, such as a submittal, into a Smart Data Validator job. Contractors typically supply submittals to owner-operators. A submittal could be a Master Document Registry (MDR), a Master Tag Registry (MTR), a Tag Document Registry (TDR), or other files.**	**Smart Data Validator Installation and Setup Guide > Configuring Smart Data Validator to Convert SmartPlant Foundation Objects**	
11.1		Load files in SmartPlant Foundation Desktop Client using Loader.	A separate schema, import mappings, export mappings, and rule sets are delivered with Smart Data Validator. You must load these files using the Loader in the SmartPlant Foundation Desktop Client.	Smart Data Validator Installation and Setup Guide > Configuring Smart Data Validator to Convert SmartPlant Foundation Objects > Load files in SmartPlant Foundation Desktop Client using Loader	