# Purpose

The purpose of the Deployment document is to provide installation instruction for installing Employee Stipend Request Application.

# Procedures for Installation and Configuration

### **Pre-Installations steps**

| **Pre-Installation Steps for ESRA** | |
| --- | --- |
| **Step** | **Procedure** |
|  | Check production site is created by opening <Production URL> |
|  | <Installation account> has site collection administrator for on the <Production URL> |
|  | PowerShell ISE should be installed on the local machine |
|  | Download all the files to <Installation Location> from the deployment folder |
|  | Make sure the service account to configure the schedule jobs have admins rights on the server.  Accounts should be part of Administrators group in the server |
|  | Make sure Windows management framework 5.1 is installed on the server where we are configuring the schedule jobs.    Once installation is complete make sure to restart the server |
|  | Account should have right to run the PowerShell scripts on the server. Execution policy should be allowed to execute the PowerShell scripts. If not run following command in PowerShell ISE  **Set-ExecutionPolicy -Scope Process -ExecutionPolicy Bypass** |
|  | Install active directory module from server manager and perform following steps.   1. Setup Server for Active directory access:    1. Open Server manager    2. Go to Manage - > Add Roles and Features Wizard.    3. Select Features section and expand Remote Server Administration Tools    4. Select the following features.      * 1. Click Next and Install to Complete the wizard. |
|  | For schedule jobs, following components must be installed on the server where jobs have to be scheduled.  **SharePointPnPPowerShellOnline**  **PSWriteExcel**  To install these modules run following commands.   * **Install-module SharePointPnPPowerShellOnline.** * **Install-module PSWriteExcel.**     Perform the following steps to install the above module.   1. Open PowerShell Editor by “Run as Administrator” 2. Run following command.      * Install-module SharePointPnPPowerShellOnline.      * If above command does not work run following command to import from the .psd1 file * Import-module (path to sharepointPnppowershellonline module) -DisableNameChecking      * Import-module (path to sharepointPnppowershellonline module) -DisableNameChecking * Install-module PSWriteExcel.      * If above command does not work run following command to import from the .psd1 file * Import-module (path to PSWriteExcel module) -DisableNameChecking |

### **Installations steps**

#### **Install frontend application**.

| **Installation steps for ESRA** | |
| --- | --- |
| **Step** | **Procedure** |
|  | Open the PowerShell ISE with run as administrator |
|  | Run the scripts **Deployment.ps1** for creating list, libraries, sitepages.etc. |
|  | Once Prompt in the PowerShell editor  Go to site pages and add webparts as per the sections 2.1.2.1  Note: Don’t press any key in the editor until above steps of adding webparts to pages is completed |
|  | Press “Y” in the PowerShell editor to continue with deployment |
|  | Set the target audience in the global navigation for Settings & Reports tab as per the section 2.1.2.2 |
|  | Set Email flag to “Yes” to allow emails to trigger as per the section 2.1.2.3 |
|  | Schedule jobs for payroll report and add remove users as per sections 2.1.2.4 |

##### Webpart configurations

###### Enroll.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page Enroll.aspx 3. Click on Edit page 4. Add ESRABeneficiaryWelcomeDetail webpart |
| 1. Add webpart ESRABeneficiaryDetail. 2. Configure the webpart as below screens.   **Configure the webpart based on the screen.**       1. Add Webpart ESRATopnavigation      1. Publish the page |

###### Approve-Reject.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page Approve-Reject.aspx 3. Click on Edit page 4. Add ESRAPendingRequest webpart      1. Configure the webpart as following screens.          1. Add ESRACompletedRequets and configure this as below screens.            1. Add top navigation webpart.      1. Publish the page. |

###### RequestOnBehalf.aspx

| **Steps to configure** | |
| --- | --- |
|  | 1. Go to Site content -> Sites pages. 2. Open page RequestOnBehalf.aspx 3. Click on Edit page 4. Add ESRARequestOnBehalf webpart      1. Add webpart ESRABeneficiaryDetail. 2. Configure the webpart as below screens.          1. Add Webpart ESRATopnavigation      1. Publish the page. |

###### Reports.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page Reports.aspx 3. Click on Edit page 4. Add ESRAReporttabs webpart      1. Add Webpart ESRATopnavigation      1. Publish the page. |

###### Settings.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page Settings.aspx 3. Click on Edit page 4. Add ESRASettingstabs webpart      1. Add Webpart ESRATopnavigation      1. Publish the page. |

###### PayrollReport.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page PayrollReport.aspx 3. Click on Edit page 4. Add ESRASettingstabs webpart      1. Add Webpart ESRATopnavigation      1. Publish the page. |

###### EnrollmentReport.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page EnrollmentReport.aspx 3. Click on Edit page 4. Add Enrollment Report webpart      1. Add Power Bi webpart      1. Configure the Webpart with PowerBi report URl      1. Add Webpart ESRATopnavigation      1. Publish the page. |

###### VersionHistory.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page VersionHistory.aspx 3. Click on Edit page 4. Add ESRAVersionHistory webpart      1. Publish the page. |

###### PendingRequest.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page PendingRequest.aspx 3. Click on Edit page 4. Add ESRAPowerUserPendingRequests webpart   Graphical user interface, text, application, email  Description automatically generated   1. Configure the webpart as following screens.     Graphical user interface, text, application, email  Description automatically generated  Graphical user interface, text, application  Description automatically generated  Graphical user interface, text, application  Description automatically generated   1. Add ESRAPowerUserCompletedRequests and configure this as below screens.   Graphical user interface, text, application, email  Description automatically generated  Graphical user interface, text  Description automatically generated    Graphical user interface, text, application  Description automatically generated  Graphical user interface  Description automatically generated with medium confidence   1. Add top navigation webpart.   Graphical user interface, text, application  Description automatically generated   1. Publish the page. |

###### StipendSummary.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page StipendSummary.aspx 3. Click on Edit page 4. Add ESRAStipendSummary webpart      1. Configure the webpart as following screens.     Graphical user interface, text, application  Description automatically generated     1. Add top navigation webpart.   Graphical user interface, text, application  Description automatically generated   1. Publish the page. |

###### BulkUpload.aspx

| **Steps to configure** |
| --- |
| 1. Go to Site content -> Sites pages. 2. Open page BulkUpload.aspx 3. Click on Edit page 4. Add ESRACreateBulkStipends webpart   Graphical user interface, text, application, chat or text message, email  Description automatically generated     1. Add top navigation webpart.   Graphical user interface, text, application  Description automatically generated   1. Publish the page. |

##### Setting target audience

| **Steps to Set Audience Target** |
| --- |
| 1. Go to Site Setting -> Navigation (under Look and Feel) 2. Select Heading **Reports** and click on Edit.     Select Target Audience    Search for the groups **GileadESRA Payroll** and **GileadESRA PowerUsers** and add these groups.     1. Click on OK to add these group as target audience.      1. Select Heading **Settings** and click on Edit.     Select Target Audience and Search for the groups **GileadESRA PowerUsers** and add the group.     1. Click on OK to add these group as target audience. |

##### Enable Emails

While moving to production with the scripts default value for email sent flag is NO to restrict the email to be sent. To enable the email do following.

* Go to Site content -> Email Templates.
* Select the record for which we want to enable the Email.
* Click on Edit tab and update ToBeSent Value to Yes
* Click on Save.

#### Schedule jobs configurations

##### Schedule Payroll report

| **Steps to configure** |
| --- |
| 1. Make sure Prerequisites are installed as per 2.1.1 2. Run this PS1 file to make sure required modules are imported.      1. Go to task scheduler in the server where we want to schedule the job. 2. Click on Create task 3. Give name ESRA\_PayrollReport.      1. Select triggers. 2. Have the following settings as displayed on the image, Select the time to run the job file     **For Staging use the following configuration:**     1. Select actions. 2. Add PowerShell as program /script. 3. In arguments section type: -File <Installation location>\PRReport.ps1 |

##### **Schedule Add/Remove user to AD Group.**

| **Steps to configure** |
| --- |
| 1. Schedule the job file    1. Go to task scheduler in the server where we want to schedule the job.    2. Click on Create task    3. Give name ESRAAddRemoveUsers.      * 1. Select triggers.     **For Staging use the following configuration:**     * 1. Select actions.   2. Add PowerShell as program /script.   3. In arguments section type : -File <Installation location>\ADDRemoveStipendUsers.ps1 |

##### **Schedule AddRemove Send Emails Job send email to Approved Users.**

| **Steps to configure** |
| --- |
| 1. Schedule the job file    1. Go to task scheduler in the server where we want to schedule the job.    2. Click on Create task    3. Give name ESRAAddRemoveSendEmails.      * 1. Select triggers.     **For Staging use the following configuration:**     * 1. Select actions.   2. Add PowerShell as program /script.   3. In arguments section type : -File <Installation location>\AddRemoveSendEmails.ps1 |

##### **Schedule Reminder Notifications.**

| **Steps to configure** |
| --- |
| 1. Schedule the job file    1. Go to task scheduler in the server where we want to schedule the job.    2. Click on Create task    3. Give name ESRAReminderNotificationEmails.      * 1. Select triggers.     **For Staging use the following configuration:**     * 1. Select actions.   2. Add PowerShell as program /script.   3. In arguments section type : -File <Installation location>\ ReminderNotifications.ps1 |

##### Procedures for replacing existing schedule file jobs

###### Replace files steps

| **Steps to replace files** |
| --- |
| 1. Login into the server with service account 2. Go to the downloaded file location 3. Back up the existing files into backup folder 4. Replace the existing files with new files      1. Rename the file to remove extension txt so the file extension will be ps1(same name as existing file) 2. Run the job from the task scheduler      1. Security exceptions pop up will come up we must allow the script to execute in the pop up 2. Check the logs created by the scripts |