# 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 adminnstrator for on the <Production URL> |
|  | Powershell ISE should be installed on the local machine |
|  | For schedule jobs, following componnects 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** |
|  | 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 Powerhell ISE  **Set-ExecutionPolicy -Scope Process -ExecutionPolicy Bypass** |
|  | Download all the files to C:/Temp from the deployment folder |

### **Installations steps**

| **Installtion steps for ESRA** | |
| --- | --- |
| **Step** | **Procedure** |
|  | Open the Powershell ISE with run as administrator |
|  | Run the scripts **Deployment.ps1** for creating list, librararies,sitepages. |
|  | Go to site pages and add webparts as per the sections 2.1.2.1 |
|  | Update page permissions for setting and reports pages |
|  | Schedule jobs for payroll report and add remove users as per sections 2.1.2.2 |
|  | Create permission level ContributeWithoutDelete and assign to payroll and Poweruser groups |

#### 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 |

#### Schedule jobs configurations

##### Schedule Payroll report

| **Steps to configure** |
| --- |
| 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      1. Select actions 2. Add powershell as program /script 3. In arguments section type : -File C:\temp\scripts\PRReport.ps1 |

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

| **Steps to configure** |
| --- |
| 1. Setup Server for Active directry 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.  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   2. Have the following settings as displayed on the image      * 1. Select actions   2. Add powershell as program /script   3. In arguments section type : -File C:\temp\scripts\ADDRemoveStipendUsers.ps1 |