Manitou 2.1 New Server Installation Guide

Implementations master article for installing Manitou 2.0 on a single server.

Manitou Prerequisites

Before starting the Manitou Core installation, please verify all of the following are in place. All exceptions to this will need to be recorded in the CRM for the project.

- Establish a connection to the customer, record in Bold Support Portal.
- Google Chrome Browser installed and set as default browser
- All Windows Updates Completed and the server restarted
  - Turn off Windows Updates and set the schedule for **Bold Support Hours**
- Installer files are copied to the machine
  - Manitou Core Files
  - SQL Database install Files
  - SSMS install files
- Verify Hard Drive Space is sized according to the SCD sent to customer
- Verify with customer that server will **NOT** be renamed post-installation
- Verify the server(s) have a **Static IP** address and not DHCP, note these in the CRM
- Verify that all **ICMPv4 traffic** is allowed on all firewalls
- Verify that all **ICMPv4 ping**is allowed on all firewalls
- Verify that all machines can communicate across the network by **Name** and **IP**.
- **Disable UAC** if using **RDP**
  - Leave UAC **on** if using **GoToAssist**. Restart server if a change is made
- Verify that Installation User has **Full Administration Rights** to computer(s).
- Verify that all transferred/downloaded files have **NO** NTFS permissions errors or blocks.

Install Necessary Roles and Features

Add Roles and Features

1. Open **Server manager**
2. Click **Manage** then select **Add Roles and Features**. Alternatively, select **Add Roles and Features** from the Welcome Tile.
3. Select Role Based or Feature-Based Installation
4. Select the intended Server that needs features installed, then click **Next**.

5. Select **Fax Server** at the Server Roles page, select **Add Features** when prompted.
6. Select the **Web Server (IIS),** select **Add Features** when prompted, then select **Next**.
7. At the Features Page expand **.Net Framework 3.5 Features** and check the box for **.Net Framework 3.5**.
8. Expand **.Net Framework 4.X Features**. Verify that **.Net Framework 4.X,** and **ASP.NET 4.X** are selected.
9. Expand **WCF Services**, verify that **TCP Port Sharing** is checked.
10. Scroll down to **Telnet Client** and check the box.
11. Expand **Windows PowerShell**, verify that **Windows Powershell X.X** and **Windows Powershell ISE** are checked.
12. Select **Next** to proceed.
13. Select **Next** at the Fax Server page.
14. Select **Next** at the Printer and Document Services page.
15. Leave **Print Server** selected when selecting role services, then select **Next**.
16. Select **Next** at Web Server Role IIS page.
17. At the Role Services page, leave the defaults boxes checked and add these additional boxes under **Web Server**:
    - Common HTTP Features > **HTTP Redirection**
    - Performance > **Dynamic Content Compression**
    - Security > **Basic Authentication**
    - Application Development > **ASP.NET 3.5**
    - Application Development > **ASP.NET 4.X**
    - Application Development > **WebSocket Protocol**

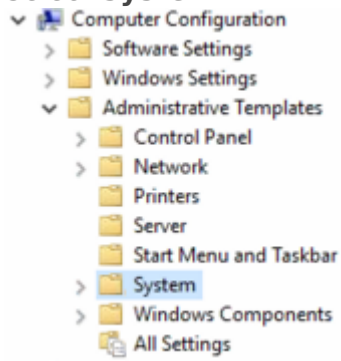
18. Expand the **Management Tools** and additionally check boxes for:
    - **IIS 6 Management Compatability** including all **sub-boxes**

19. Select **Next**, confirm the details of installation then select **Install**.

NOTE: If you are prompted for an alternate source path at the Confirm Installations page, follow the instructions Below.

.NET 3.5 Source File Fix

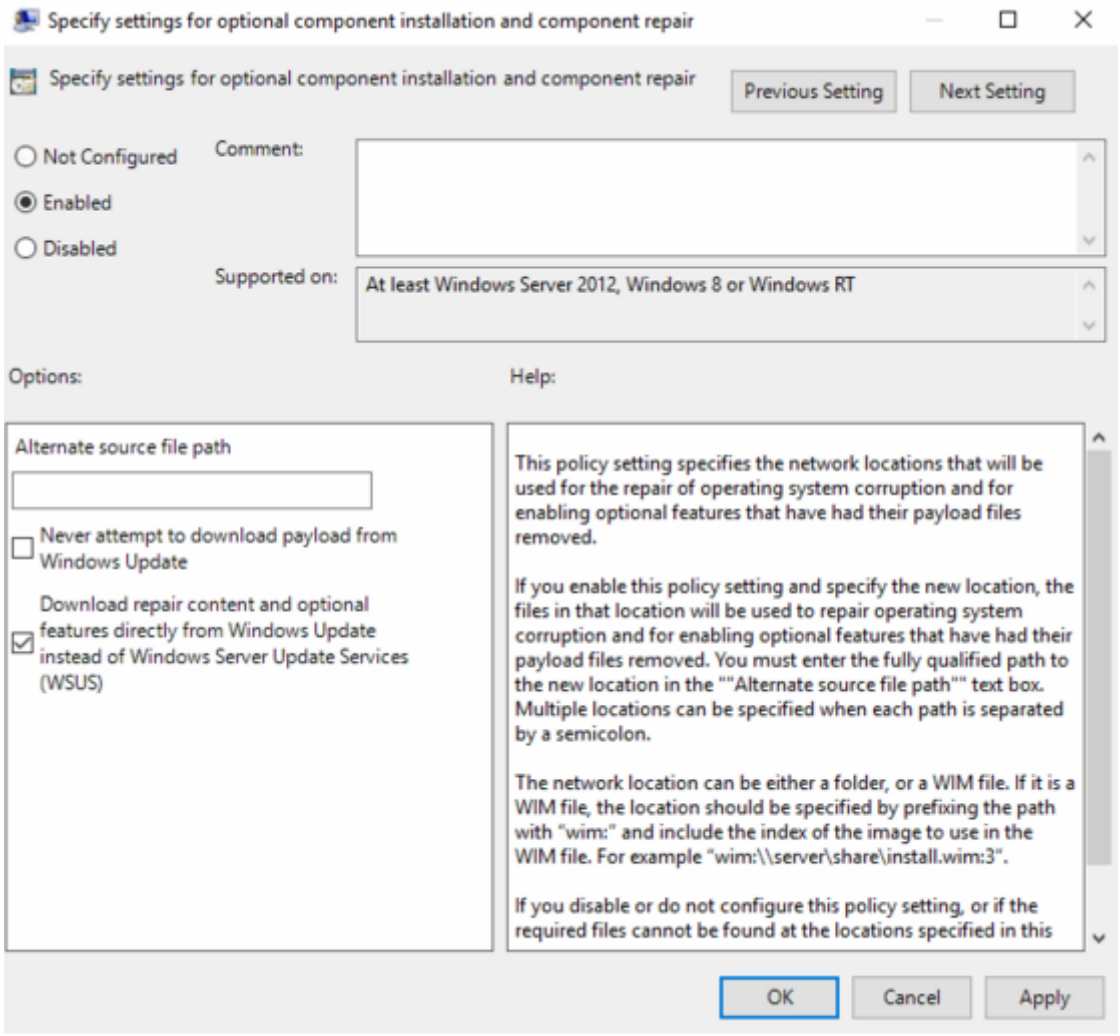
1. Run **gpedit.msc**
2. expand **Computer Configuration → Administrative Templates**
3. Select **System**



4. Right click the setting **Specify settings for optional component installation and component repair**

and select **Edit**.

5. Set to **Enabled.**
6. Check the box that says **Download repair content and optional features directly from Windows Update instead of Windows Server Update Services (WSUS)** then select **OK**.



7. Close the **gpedit** application.
8. Launch a **command prompt** as **administrator**
9. Type in and run the following command
   DISM /enable-feature /featurename:NetFx3 /online /all
10. Return to the **Add Roles and Features** application and re-install any necessary roles or features.

SQL Installation

Planning/Prepping the Install

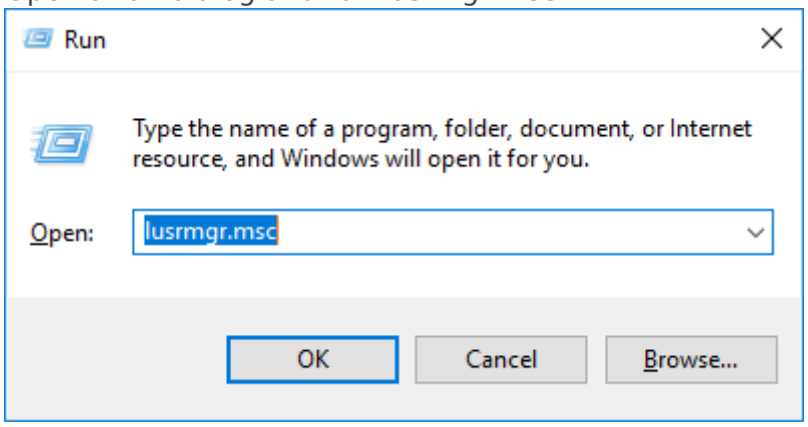
Before starting the install of SQL please outline the following in your own notes. Verify that the customer is aware of these if needed.

- Note the local or domain users that will be used for the SQL Windows Administration accounts.
  - It is recommended that a local MSSQL user is created on each machine to be used for replication, however, if it is required to be a domain user, we will need to ensure that the domain user is added to the local administrators group, and the password will not expire.
- Verify the drives the installation will include. It is highly recommended we have:
  - 1 OS drive
  - 1 SQL drive
  - 1 DatabaseCollector\Logs drive (Please note this is not for SQL logs, but for the DatabaseCollector logs)
- Determine where the SQL Installation Media is stored and keep a backup on hand for possible future emergency installs.
  - **NOTE**: This step is required for UL. All installation media will need to be on hand for any emergency events requiring re-installation.
- Verify Windows Updates have been completed.

Creating the MSSQL Account

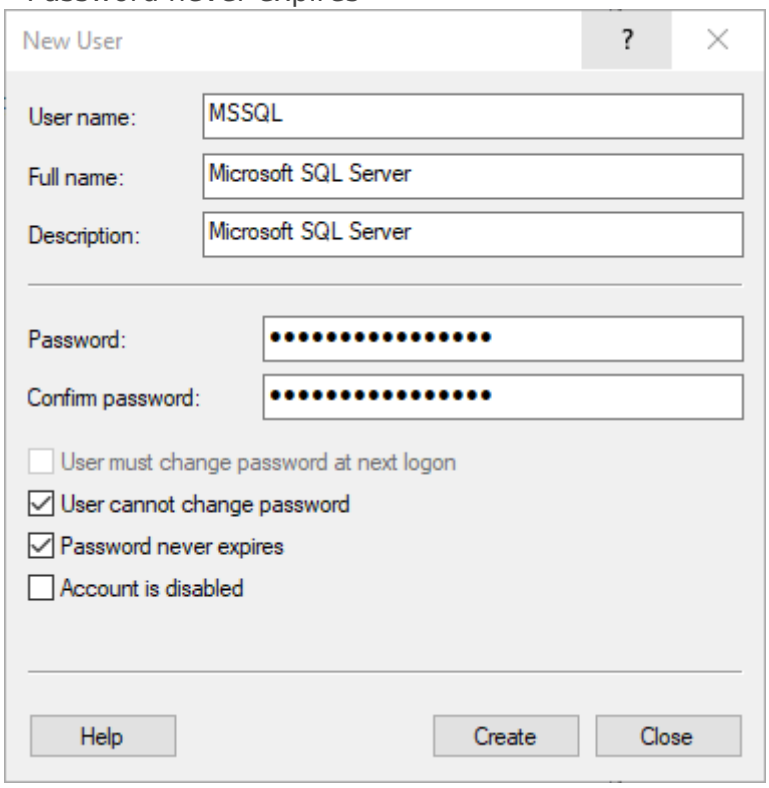
The MSSQL user is used for replication between the SQL databases

1. Open a run dialog and run lusrmgr.msc



2. Open the **Users** folder and then right click within the user listing to select "**New User...**"
3. Create a **MSSQL** Username with the name and description of "**Microsoft SQL Serve**r"
4. Create a **strong password** for the account, recording it in the **CRM** under the name **MSSQL**.
5. **Uncheck** "User must change password at next logon"
6. **Check** "User cannot change password"
7. **Check**

"Password never expires"



8. Select **Create,** then close the add user dialog.
9. Right-click on the created MSSQL user and select **Properties**.
10. Select the **Member Of** tab and then select Add...
11. Type in **Administrators** and select **check names**, select **OK** to confirm making this account a local admin.
12. Select **OK** to close the MSSQL User Properties window and close out of the lusrmgr application.

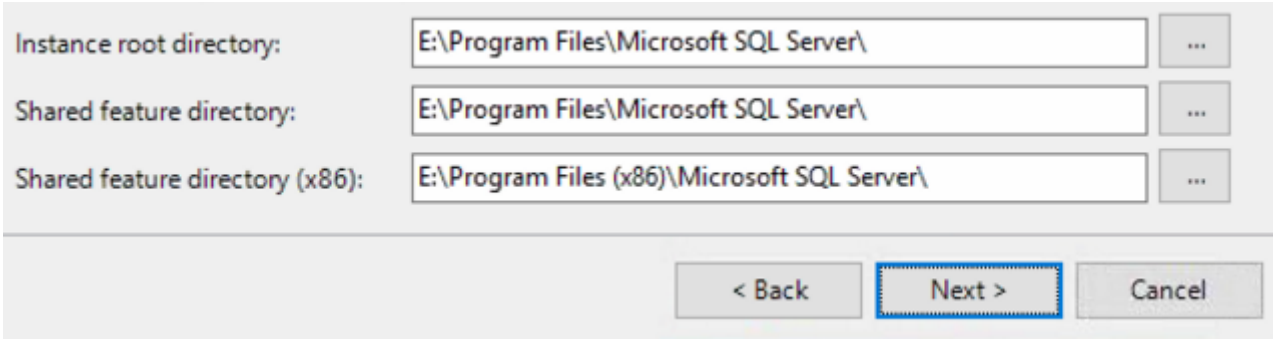
Installing the SQL Server Instance

The following steps outline the standard installation steps for the SQL server instance

1. Start the **SQL Server Installation Center**, extracting files as necessary.
2. Under the Installation Tab select **New SQL Server stand-alone installation or add features to an existing installation.**
3. Leave **Use Microsoft Update to check for updates** box **unchecked**, select **Next.**
4. An error message may appear saying SQL Server setup could not search for updates, select **Next** to proceed.
5. The Product Key page will be where the product key can be entered if not already present. If applicable, enter the product key, then select **Next**. (Express does not require a key)
6. **Accept** the License Terms, leaving the **CEIP unchecked** unless specified by the customer, select **Next**.
7. On the feature selection page, select **ALL Features** minus the following:

- SQL 2016 PolyBase (if applicable)
- Microsoft R Open (if applicable)

8. Change the **Instance Root**, **Shared Feature**, and **Shared feature (x86)** directors to match the **SQL Data drive** desired and/or specified, then select **Next**.



9. On the Instance Configuration screen, leave the instance as **Default Instance** (MSSQLSERVER)**,** select **Next**.
   - **NOTE**: A named instance is requirement it is outside of the typical Manitou installation scope. This will need to be addressed with the project manager for this project.

10. From the Server Configuration page, set the **SQL Server Agent** to **Automatic startup**.
11. Select the **Collation** tab and verify the Database Engine is set to **SQL_Latin1_General_CP1_CI_AS,** select **Next.**
12. From the Database Engine Configuration screen, set the **Authentication Mode** to **Mixed Mode**
13. Enter in a **strong password** for the **SA Account** and record it in the **CRM** under the label **SA**.
14. For the Specify SQL Server administrators, select **Add Current User**
15. Select **Add...** type **MSSQL** then select **Check Names**, then select **OK** to confirm the local MSSQL account.
    - When adding the MSSQL user account it may bring a window that says Name Not Found. If it appears change the location from Entire Directory to the machine SQL is being installed on.
    - **OPTIONAL**: Select **Add...** then add any additional windows accounts that need administrative access to SQL.

16. Select the **Data Directories** tab and make sure all directories are set to the intended drive for SQL, select **Next**.
    - **NOTE**: The log drive (if it exists) is not for the database log, it is intended for the database collector installed at a later time.

17. Repeat **steps 14-16** for **Analysis Services**, select **Next**.
18. Verify the **Install and Configure** option is **selected** for Reporting Services, click **Next**.
19. At the Distributed Replay Controller Screen, select **Add Current User...** then **Add...** user **MSSQL** as completed previously.
20. There will be a final verification window, review the options selected and select **Install** to complete the Instance installation.

21. Verify that all features successfully installed at the installation complete screen.
22. If necessary, repeat these steps on all additional Database Servers.

Install SQL Server Management Tools

Now that the SQL instance has been installed, it is necessary to install the SQL management tools for the SQL version that was installed. Install the tools using the installer that was already copied to the machine.

If the installation files for the SSMS were not already downloaded to the machine, follow these instructions.

1. Open the **SQL Server Installation Center** if not already open.
2. From the **Installation Tab**, select **Install SQL Server Management Tools**
3. A website will open presenting links to **Download SSMS**
4. Download the latest **SSMS General Availability** version to the desktop
5. Once downloaded run the **SSMS setup utility**.
6. Select **Install** to begin.
7. Once the install is complete, a **restart** of the server is required.
8. If necessary, repeat these steps on all additional Database Servers.

Final Configuration

1. Open **SQL Server Configuration Manager** (Start → Microsoft SQL Server 2016 → Sql Server 2016 Configuration Manager)
   - This must be opened in the same version the instance install was.
2. Login with the **SA account** using the credentials you made earlier.
3. From the SQL Server Configuration Manager, expand **SQL Server Network Configuration** and select **Protocols** for **MSSQLSERVER**
4. Right click on the **Named Pipes** protocol and select **Properties**.
5. Set **Enabled** to **Yes**, then select **OK**.
6. Right click on the **TCP/IP** protocol and select **properties**.
7. Verify **Enabled** is set to **Yes.**
8. Verify **Named Pipes** and **TCP/IP** are **Enabled**.
9. Select the **IP Addresses Tab**, verify all IP Entries are **Active**, **Enabled**, and have T**CP Port** set to **1433**.
10. Scroll down to **IPAll**, verify **TCP Dynamic Ports** is **empty**, and that the **TCP Port** is set to **1433**.
11. Select **OK** when complete.
12. Select **SQL Server Services** in the navigation pane, **Restart** all active SQL Services then close the application.
13. Open **SQL Server Management Studio** (Start → Microsoft SQL Server Tools → Microsoft SQL Server Management Studio)
14. Login with the **SA account** using the credentials you made earlier.

15. Right-click the **root server node** and select **Properties.**
16. Select the **Memory tab,**
17. Specify the **Maximum server memory** (in MB) to be 60% of the total installed memory of the server itself.
    - NOTE: Standard practice is to reserve **4 GB** for **OS** and **2 GB** for **Manitou services** at a minimum.
18. Select the **Connections tab** and verify the **Allow remote connections to this server** check box is **checked**.
19. Select the **Advanced tab,** under **Miscellaneous,** set the **Max Text Replication Size** to **2147483647**.
20. Select **OK** to apply all changes.
21. Close the application.

Creating the SNAPSHOT Folder

1. Open **File explorer** and navigate to the root directory of the specified data drive.
2. Create a **New folder**, name this folder **SNAPSHOT**
3. Right-click this folder and select **Properties**.
4. Select the **Sharing tab**, then click **Share**.
5. Type in **MSSQL** then select **Add**. If any other accounts were granted SQL access previously, **Add** them also.
6. Change the permissions level to **Read/Write** for each additional user added, then select **Share.**
7. If sharing was completed, select the **Done,** then select **Close** on the SNAPSHOT Properties window.
8. Repeat all steps on additional database servers.

Installing Manitou

This section will cover the installation of Manitou and its basic configuration for use. It is important to note that the **.exe** applications should be installed, **not .msi** installers. This will allow all necessary re-distributables, dependencies, and components to be installed before the core software. If the files are not already copied to the machine, open Chrome and navigate to

http://support.boldgroup.com/media/private/neoinstallpackage.zip

> Technicians should use the **.EXE** applications to install Manitou. Do **NOT** using the .msi versions.

Distributer Installation

This installer will be ran on the first server installed. It should not exist on any other machines unless it is a multi region server environment.

1. **Extract** the Manitou Installation folder.
2. Once extraction is complete, open the extracted folder and navigate into the **NeoInstallPackage/Installers** folder, then launch **Distributer_Setup.exe.**
3. Agree to **Install** any additional dependencies if prompted.
4. After the additional dependencies are installed, The Bold Distributer Client installation window will launch, select **Next**.
5. Install Manitou into the **default location** (OS Installation drive) location unless otherwise specified.
6. Verify Install is for **Everyone** is **checked**, then select **Next**.
7. Confirm the installation by selecting **Next**.
8. When prompted enter the **Computer Name** of the machine Distributer is being installed on.
9. Select **Yes** to continue when prompted that the Distributer Service failed to contact.
10. Select **Close** when the installation completes.
11. In a File Browser, Navigate to the Manitou directory that was just installed (Default os **C:\Program Files (x86)\Bold Technologies\Manitou)**
12. Open the **Distributer** folder.
13. In a separate File Browser, navigate to **NeoInstallPackage/Updates. Copy** the contents of this folder into the open File Browser navigated to **C:/ProgramFiles(x86)/Bold Technologies/Manitou/Distributer,** approving access and over-writing files if prompted.

Manitou Server Installation

This installer will be ran on all database servers and all servers where a Broker will run. It is recommended that the Broker exists on the same server as the database.

1. Navigate into the **NeoInstallPackage/Installers** folder.
2. Run the **ManitouServer_Setup.exe** application.
3. Agree to **Install** any Dependencies**.**
4. The Manitou Server install window should appear, select **Next.**
5. **Accept** the EULA if prompted.
6. Verify that **Create Manitou Database** and **Disable Automatic Updates** option boxes are **Checked**.
7. Install Manitou into the **default location** (OS Installation drive) location unless otherwise specified.
8. Verify Install is for **Everyone** is **checked**, then select **Next**.
9. Confirm the installation by selecting **Next**.
10. If prompted, specify the **Computer Name** of the **Distributer** server
    - This is the server name where the distributer was installed.
    - **Port 7007** must be **open** in both directions between **ALL** servers and the distributer machine.

- The window may prompt behind the installer, check that the prompt is not hidden behind the installation window if progress seems to have frozen.

11. When prompted, specify the Database server connection information:
    - **Server Name** - location where the **SQL Server** Instance was installed.
    - **Database Name** - should be left as **MANITOU**
    - **Database User** - **SA** (unless otherwise specified, cannot be windows authentication)
    - **Database Password** - password created during Instance installation (Should be recorded in **CRM**)

12. Select the **Test** and wait for it complete, once successful select **OK**.
13. When prompted, select the **IP Addresses** assigned to the machine in the drop downs, then select **OK**.
    - **IP addresses must be static**
    - **IP addresses specified must be IPv4.** Do not select IPv6 addresses even if they exist.

14. Import any countries the customer will have customers in, then select **OK**.
    - This step cannot be changed or repeated once submitted. The software and the database must be removed and reinstalled to change submissions to this form.

15. Select **Close** to exit the completed installation.
16. Repeat these steps on all servers needed.
17. Once all servers are installed, add their information into **CRM**.

Manitou Client Installation (legacy/VB)

This installer will nee to be be run on all application servers.

1. Navigate into the **NeoInstallPackage/Installers** folder.
2. Run the **ManitouClient_Setup.exe** application.
3. Agree to **Install** any Dependencies**.**
4. The Manitou Client install window should appear, select **Next.**
5. **Check** the box to install BOTH the Supervisor and Operator Workstations, then select **Next**.
    - This is a requirement of the servers and may/will be different on individual workstation installations.

6. Enter in all the Manitou **Server Names** that will contain an **Application Server** (typically all DB servers), then select **Next**.
7. Install Manitou into the **default location** (OS Installation drive) location unless otherwise specified.
8. Verify Install is for **Everyone** is **checked**, then select **Next**.
9. Select **Next** to confirm installation.

10. Select **Yes** to continue if prompted that the Sentry Service failed to contact.
11. Select **Close** to exit the completed installation.
12. Repeat these steps on all servers needed.

FEP Installation

This installer will typically be ran on all database or application servers. It is not uncommon to have separate servers dedicated for FEPS. Project Managers and Kickoff calls should outline individual setups.

1. Navigate into the **NeoInstallPackage/Installers** folder.
2. Run the **FEP_Setup.exe** application.
3. Agree to **Install** any Dependencies**.**
4. The Manitou FEP install window should appear, select **Next.**
5. **Check** the box for **Disable Automatic Updates** then select **Next**.
6. Install Manitou into the **default location** (OS Installation drive) location unless otherwise specified.
7. Verify Install is for **Everyone** is **checked**, then select **Next**.
8. Select **Next** to confirm installation.
9. Select **Close** to exit the completed installation.
10. Repeat these steps on all servers needed.
11. If the servers that FEPs are installed on do are not recorded in **CRM**, record them now.

DB Manager Installation

1. Navigate into the **NeoInstallPackage/Installers** folder.
2. Run the **DBManager_Setup.exe** application.
3. Agree to **Install** any Dependencies**.**
4. The Manitou DBManager install window should appear, select **Next.**
5. Install Manitou into the **default location** (OS Installation drive) location unless otherwise specified.
6. Verify Install is for **Everyone** is **checked**, then select **Next**.
7. Select **Next** to confirm installation.
8. Select **Close** to exit the completed installation.
9. Repeat these steps on all servers needed conditional information:
    - This should be on all database servers.
    - This should not be on any non database servers.
    - Only one DB Manager should be open at one time.

Bold License Manager Installation

This typically is installed on the same server the Distributer Commander is installed on. Please verify that the machine it is installed on has a note in CRM's server listings as being the license server. **This should only exist on one server**.

1. Navigate into the **NeoInstallPackage/BoldLicenseManager_Setup** folder.
2. Run the **setup.exe** application.
3. Agree to **Install** any Dependencies**.**
4. The Manitou License Manager install window should appear, select **Next.**
5. Install Manitou into the **default location** (OS Installation drive) location unless otherwise specified.
6. Verify Install is for **Everyone** is **checked**, then select **Next**.
7. Select **Next** to confirm installation.
8. When prompted, enter in the configuration details for the license email provided to the customer:
   - **Central Station ID** - This is the **account ID** for the customer being installed.
   - **Central Station Name** - This is the **Account Name** in full as found in **CRM**.
   - **POP3 Interval** - **30**
9. Select **OK** to proceed.
10. Select **Close** to exit the completed installation.

Bold License Client Installation

This must be installed on the same server as the Bold License Manager.

1. Navigate into the **NeoInstallPackage/BoldLicenseClient_Setup** folder.
2. Run the **setup.exe** application.
3. Agree to **Install** any Dependencies**.**
4. The Manitou License Client install window should appear, select **Next.**
5. Install Manitou into the **default location** (OS Installation drive) location unless otherwise specified.
6. Verify Install is for **Everyone** is **checked**, then select **Next**.
7. Select **Next** to confirm installation.
8. Select **Close** to exit the completed installation.

Verify .DLL Files

It is necessary to verify some of the .ddl files that should be present in the Manitou Directory.

1. Open a File Browser and navigate to the Manitou directory, default **C:/ProgramFiles(x86)/Bold Technologies/Manitou/**
2. Verify the presence of the following **.dll** files:
   - rscoree.dll - No longer needed in 1.6.2 and above, still required below
   - ManagedImports.dll
   - RecordComms.dll - Only MediaGateWay, SnapReporter, and very old BoldNet installations
   - dbnetlib.dll - Required for Server 2012 and up, located in InstallPackage
3. Verify these exist on other server if applicable.

Licensing Manitou

After installing the Manitou software, it is important to complete the license before completing any additional steps. The steps below detail how to configure the license client and then create a license for a Manitou server.

Configuring the Bold License Client

1. Run the **Bold License Client** from the shortcut located on the desktop

2. Once open, select the Add button.
3. Enter in the following information:
   - **Machine Name** - The Computer Name of the server to be licensed
   - **System Type** - The Role of the server to be licensed (Dropdown Menu)
   - **Description** - A description of the server type (Typically Manitou Server or MG Server)
   - **IP Address(es)** - IP address of the server to be licensed
     - **Recommended IPv4 only**
     - Can be retrieved automatically by selecting the arrow-world button. 
4. Select Save to store the information entered
   - It is possible the configuration may present an error stating the config was updated previous to the save. This means the information unfortunately will need to be entered again to be saved. This will generally occur when it takes a large amount of time entering in the system information.
5. Repeat steps on any additional servers to be licensed.

Generating a Licensing Request

1. To apply a license, start the **Bold License Client** if not already running.
2. Right click on the server to be licensed and select **Manual License Request.**
3. Select **Save to file,** select the **...** elipsies and choose a filename based on the server name and save it to the desktop.
4. Select **Save** to place the license request on the desktop.
    - If the license request fails, ensure the following.
        - The Bold Monitor Service is running on the server to be licensed.
        - Port 7010 is open between the license client server and the server to be licensed.
        - The Manitou directory containing the bold monitor service has the file ManagedImports.dll

Authorizing a License Request with License Master

1. Connect to the **LicenseMaster** server (see Support/Implementation manager for details)
2. **Transfer** the created license request file to the **desktop of the the LicenseMaster server.**
3. Start the **Bold License Master** and login (See Support/Implementation manager for details)
4. Upon startup of the Bold License Master, a configuration window will appear with mail server settings. **Do not change** any of the settings and select **OK**.
5. Select **File** and then **Import License Action**.
6. Select the **ellipsis** next to the text entry field of **File Name** and then open the license request located on the desktop.
7. Verify the **Central Station Name** and **Machine Name** to be imported, then select **OK**.
8. Navigate to and select the **Central Station** from the listing on the left
9. Right click on the license action created. (The Machine column will match the Host name the request was created on)
10. Select **Create License Key**.
11. Fill in the License details to **match the products purchased** on the project proposal.
    - This can be a large task to handle, please see the Support or Implementation manager for assistance if needed.
    - The project proposal can be found under the Account's documentation in CRM. Please see CRM documentation for more details.

12. Once all license options are filled, the license response can be saved, select **Save to File**.
    - Licenses should be created by default with **185** days expiration unless otherwise specified.

13. Click the **ellipsis** next to the text entry field of File Name.

14. Specify the same name with a **prefix** or **suffix** added to to identify this is the response file.
    - EX: **UPD**CustIDSVR1, CustIDSVR1**fin**, etc...

15. Select **Save** and save the file to the desktop.

Installing Updated Licenses on Customer License Client

1. Transfer the generated license response files from the LicenseMaster Server to the Requesting Bold License Client Server's desktop.
2. Open the **Bold License Client** Server if not already open
3. Select **File** and **Manual License Update...**
4. Select the **ellipsis** next to the text entry field of File Name and then open the license response located on the desktop.
5. Verify the **Machine Name** to be licensed, then select **OK**.
6. The license may take a few moments to apply, select **OK** when the license applies successfully.
7. Repeat the license steps above for any additional servers to be licensed.
    - It is recommended all license requests, updates, and responses are done simultaneously.

8. Delete **all generated blc files** from the License Master and Bold License Client servers' desktop.
9. Once all servers are licensed, update the licensing spreadsheet to include the new expiration date for the customer account installed.
    - The licensing spreadsheet can be located via this link.
    - If the site does not exists on the licensing spreadsheet, add it. This is how support tracks license expirations for renewal.
    - For access or questions regarding the licensing spreadsheet, please contact the support manager.

Installing Updates Through Distributer

Now that the installers for Manitou Core have been ran and the system is licensed, the software and databases need to be updated and configured.

Pushing Patches and Packages

To continue with configuration, the server(s) will first need to be updated. This will not follow the traditional update/upgrade steps as this is a new install. Please ensure the update files are in the Distributer folder as outlined in the Distributer install instructions.

1. Open **Distributer Commander**. (Located on the desktop of the Distribution Server)

2. All servers installed should display in the Distributer commander.
    - If any are not appearing ensure that the **Distributer Client** is running on each server installed.
    - If the Distributer Client is not on a server installed, run the standalone **distributer client** installer.

3. Select **all servers** installed and right click on any of the servers selected, then select **Send a Package**.
4. In the **Package Number** field, fill in **2** then select **Send Package**.
5. After the package has been sent and applied it will appear under packages installed for that machine.

Machine Name	Patch No	Packages
VICTA01-MAND...	Unknown	2
VICTA01-MAND...	Unknown	2
VICTA01-MAND...	Unknown	2

    - The process of sending packages and patches can take up to a few minutes before the patch or package will show as applied. If there is concern the package is not being applied, the Distributer log can be monitored with the logger. Please see Logger documentation for more details on how to monitor processes.

6. Select **all servers** installed and right click on any of the servers selected, then select **Send a Package**.
7. In the **Package Number** field, fill in **1** then select **Send Package**.
8. After Packages 2 and 1 show as applied, **close** the Distributer Commander
9. Restart the Bold Distributer service .
    1. Start **Services.msc** from a run dialog.
    2. Locate the service name **Bold Distributer,** then **Restart** the service.
    3. Close the Services window.

10. Once the service restarts, launch the **Distributer Commander** again.
11. Select **all servers** installed and right click on any of the servers selected, then select **Send a Package**.
12. In the **Package Number** field, fill in **9** then select **Send Package** and wait for the installation to complete.
13. Select **all servers** installed and right click on any of the servers selected, then select **Send a Package**.
14. In the **Package Number** field, fill in **50** then select **Send Package** and wait for the installation to complete.
15. If applicable, repeat this process for any additional services that need to be installed.
16. Select **all servers** and right click on the group, then select **Update to Latest Patch**.
17. Select **Send Files** to confirm the update push.
18. After the patch is applied it will show the Patch Number applied under the Patch No column.
19. **Close** the Distributer Application once the patch update completes.

- **NOTE:** If the Patch No does not update within a few moment try the following:
  - Restart the Distributer Client and try again.
  - Restart the Distributer Client Services and try again.
  - Check for additional errors in the logger.

DB Manager Configuration

Configuring the Database with DB Manager

In order to apply database updates the DB Manager will need to be configured, please follow these steps before proceeding to the Database Update section.

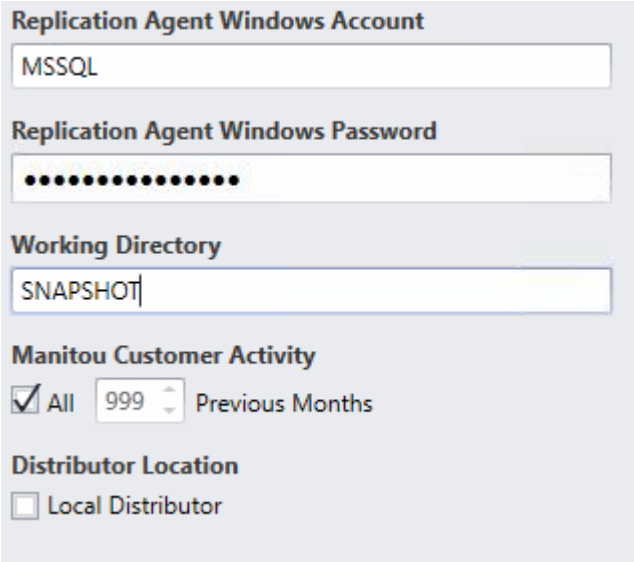
1. Set the **DB Manager** to **Always Run as Administrator.**
   - **Right click** on the **DB Manager application** icon located on the desktop.
   - Select **Properties**
   - Select the **Compatibility Tab**, **select** the checkbox for **Run as administrator,** then select **OK**
   - Select **OK** on the Properties window to save changes.

2. Start the **DB Manager** application located on the desktop.

3. From the File Bar, **File** > **New** (or press Ctrl+N)
4. Specify the **Database System Name** (typically **System 1**)
5. Add **all Databases** that will be configured as part of the Manitou Core system.
   - **Server Name** - The **Computer Name** of the database server
   - **Use Windows Authentication** - **Uncheck** this field
   - **Login** - Should be the **SA account** stored in **CRM** unless otherwise specified.
   - **Password** - The **SA password**
   - **Database** - Once all fields to the left are filled the drop down should be changed to **MANITOU**
     - If the dropdown does not populate, the connection string is failing and it is likely the sa user or password is incorrect.
     - If the dropdown does not populate for remote servers, please ensure **port 1433** is open on the firewall.
   - **Database Type** - Should be left as **Standard**.

6. Once all Databases are entered, select **File → Save** (or press Ctrl+S)
7. Set the File name as **DBMANConfig** and save in the **Bold Technologies** folder (Typically **C:\Program Files (x86)\Bold Technologies)**
8. Select the **Replication tab**.

9. Fill out the information with the **MSSQL** user and **SNAPSHOT** share created during the SQL Install.
    - **Replication Agent Windows Account** - **MSSQL** (other users may be specified)
    - **Replication Agent Windows Password** - **MSSQL Password** (stored in CRM)
    - **Working Directory** - **SNAPSHOT**
    - **Manitou Customer Activity** - Leave as **default**
    - **Distributor Location** - Leave **Local Distributor** checkbox **unchecked**



10. **Save** (Ctrl + S)changes made, then **close** the Database Manager.
11. Repeat steps on all additional database servers.

Applying Database Updates

Typically before applying a Database update a backup should be made, for the updates occurring here, a backup is not needed.

1. Open the **DB Manager**
2. In the File menu, select **File → Open** (Or press Ctrl + O)
3. Open the **DBMAN.dbsystem** file created earlier (should be located in **C:\Program Files (x86)\Bold Technologies**)
4. Under the **Activities tab**, select **Database Updates**
5. From the **Database dropdown,** select the **primary** database installed.
6. Verify the **Database Update Type** contains the correct **version identifier,** (2.1.0.0 for this install) then select **Apply**.
7. Repeat Update steps for any additional database servers installed.
    - **Note:** This can be done from the DB Manager on the primary server, it is not necessary to run the DB Manager installed individual servers.

8. Select the **Health Check tab** on the under **Activites**.
9. From the **Database dropdown,** select the **primary** database server.
10. In the **Schema field**, select the **magnifying glass**.
11. Navigate to the **Manitou Directory** in program files.
12. Click into the **Search Filter field** and enter in **SCHEMA**

13. Select the **most recent MANITOU_SCHEMA.xml** file, then select **Open**.
    - If it is not in the Manitou Directory, it can be found in the **patches** within the **Distributer folder**.
    - Ensure the **latest** MANITOU_SCHEMA.xml file is being used to avoid critical issues later in the install.

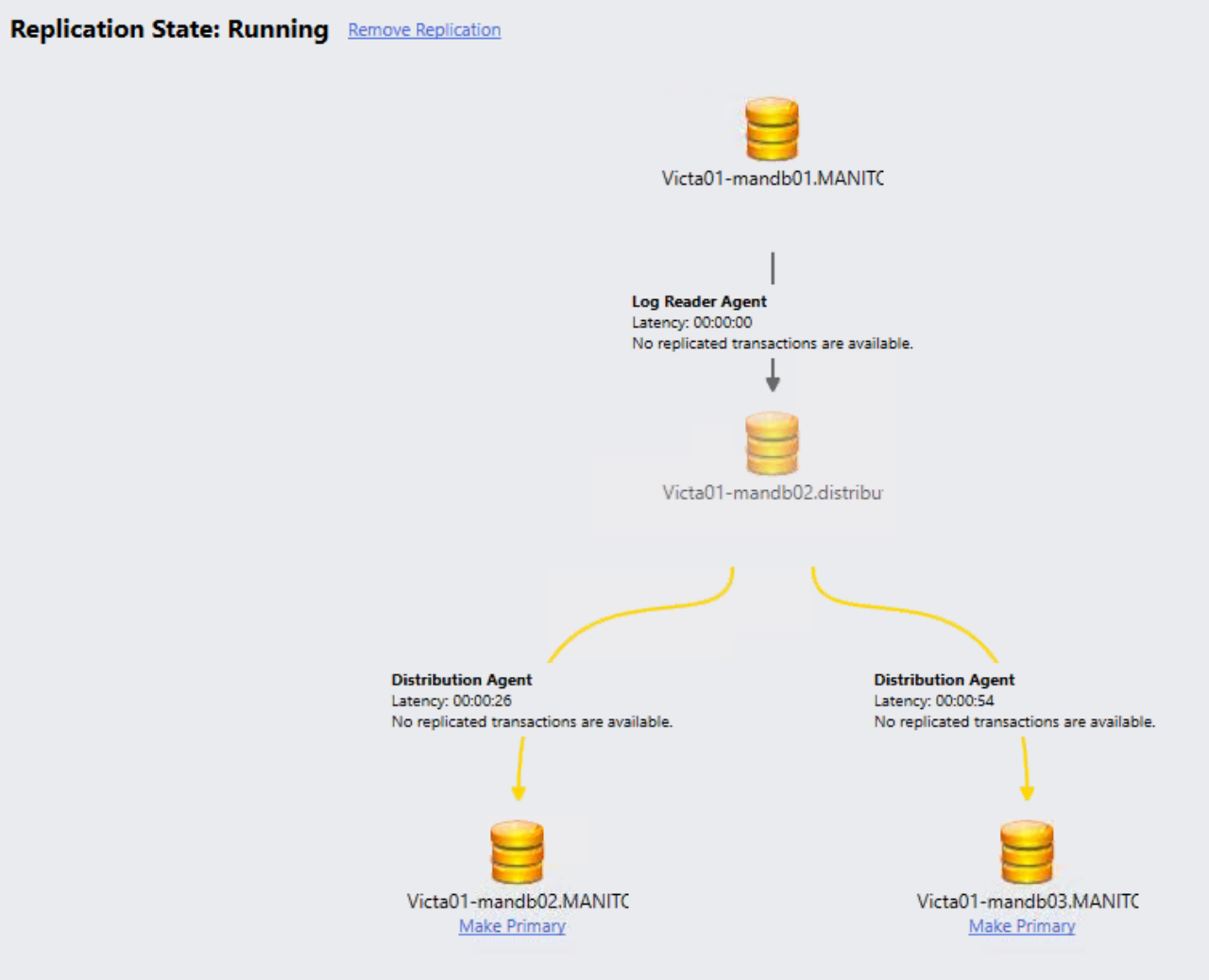
14. Once the Schema File is specified, select **Check Database**.
15. The health check will populate **Database Modification Required** table.
16. Click the column header to for **Change Type**, then click **Select All**.
17. **Uncheck any boxes that have a change type of Remove**
18. Once all **Non-Removal Changes** are selected, click **Apply Changes** and wait for the health check to complete.
19. Select **Check Database** again to ensure all changes were applied.
20. Under **Configure**, select the **Populate Tables** tab.
21. Select the the **Primary** database server from the **Database dropdown**.
22. If available, click the buttons for **Repair Reverse Command tables** as well as **Populate City and Region Geo-Shape Tables**.
23. Repeat Health Check steps for any additional database servers installed.
    - **Note:** This can be done from the DB Manager on the primary server, it is not necessary to run the DB Manager installed individual servers.

Starting Replication

Now that all updates are complete, before any Manitou configuration is complete, replication should be started. This ensures all changes within the Manitou software are replicated to other servers.

1. Open the **DB Manager** if not already open.
2. Under **Activities, s**elect the **Manage Replication** tab.
3. Make the first Database Server that was installed **primary**.
4. Replication will build to all servers in the list. Once complete it should look similar to the

following.



Start and Configure Manitou

This step of the process is when the Manitou application will be started and the configured. Take note to the configuration details as the steps must be followed completely for passing the transition checklist for support.

Configuring the MSM for First Launch

1. Start the MSM Config application. (Start button, > MSM Config)

2. Select **Edit** and enter in the following configuration details:
    - **Configuration Name** - **System 1** (each additional server should have incremental system numbering. ex: System 2, System 3, etc...)
    - **Computer** - **Comptuer Name** of the server where the **Manitou Server installer** was installed.

    - **Database Service** - **MSSQLSERVER**
    - **Backup Db Service** - **MSSQLSERVER**
    - **Server Name** - **Computer Name** of the server where the **Manitou Server installer** was installed.
    - **Database Name** - **MANITOU**
    - **Database User** - Should be the **SA account** stored in **CRM** unless otherwise specified.
    - **Database Password** - **SA password**

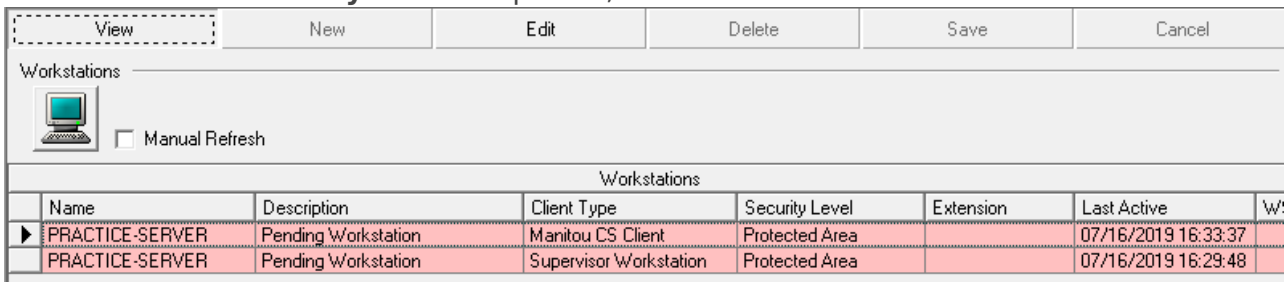
3. Select **OK** to save the configuration.
4. Launch **Services.msc**, then locate and **restart** the **Bold Monitor** Service.

Luanching MSM and Starting Manitou Services

This section covers the starting Manitou services

1. On the **primary** database server, open the **MSM** shortcut on the desktop.
2. Right click on the **Logger** and select **Start**
3. Right click on the **Broker** and select **Start All**
4. Verify all services start without issues
5. Start both the **Operator** and **Supervisor** Workstation Clients **as administrator,** ignore the Operator client failure.
6. Log in to the **Supervisor** client (**SWS**) using the following credentials:
    - **2.0 and previous Default**
        - **Default User** - **BOLD**
        - **Default Pass** - **a**
    - **2.1 Default**
        - **Default User - BOLDTECH**
        - **Default Pass - b0ldt3ch!**

7. **Accept** the Software Use Agreement
8. Navigate to the **workstation** list, **Maintenance → Workstations**
9. Select the **Edit** Tab.
10. Change the **Supervisor** and **Operator** entries for the current machine to **Protected Area** under the **Security Level** dropdown, then select **Save**.



11. Switch back to the **Operator Workstation** client, and select **Retry**

.

12. Login to the Operator Workstation using the same credentials as the Supervisor Workstation previously:
    - **Default User** - **BOLD**
    - **Default Pass** - **a**

13. Once logged in successfully, **exit** the **Operator** application.

Manitou NEO Installation

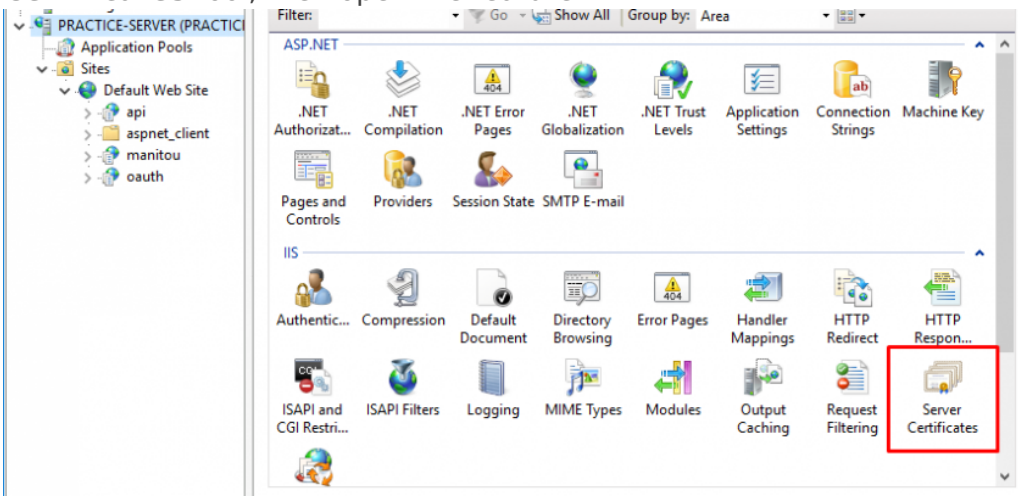
1. Navigate to the **Manitou Distributer** Directory, open the most recent patch folder and launch the **ManitouNEO_setup.exe**
2. Select the checkbox for **ManitouNeo** installation.
3. Enter the following information:
    1. **IIS Server - FQDN of the primary server**
    2. **Sentry Service - FQDN of the primary server**
    3. **Utility Service Port - 7020**
    4. **Video Service Port - 7022**
    5. **Timeout - 15**

4. Open the **Internet Information Services Manager** (IIS)
5. Expand and navigate down to **SERVERNAME > Sites**, right click **Default Website** and select **Edit Bindings....**
6. Select **Add...**
7. Using the dropdown select **HTTPS.**
8. Leave the **default** settings for **IP address** and **Port**.
9. In the **Host Name** field, enter the **FQDN** of the **primary** server.
10. Leave **Require Server Name Identification** box **unchecked**.
11. For **SSL certificate**, click the **Select** button.
12. Choose the appropriate SSL Certificate for this installation.

- **NOTE**: If the customer does **not** have an SSL Certificate, a Self Signed can be created for use.

Creating a Self Signed SSL Certificate

1. in the **IIS**, navigate to the **SERVERNAME**, then locate the **Server Certificates** tool, then open the feature.



2. Open the feature, then select **Create Self Signed Certificate** from the **Actions** Pane
3. **Specify** the name for the SSL Certificate. Using the * **ServerName*SSL** is appropriate.
4. From the dropdown, select **Web Hosting**, then click **OK**.

Installing the Manitou Utility Service

For users leveraging any web clients, it is necessary to install the Manitou Utility Service.

1. From the **Manitou\Distributer** directory, locate and launch the most recent **Manitou_Utility_Service_setup.exe**
2. Leave the **Ports** at their **default** settings.
3. **Accept** the License Agreement, then select **Next**.
4. Install Manitou Utility Services into the **default location** (OS Installation drive) location unless otherwise specified.
5. If prompted, approve the folder conflict by selecting **Yes**, then click **Install**.
6. Repeat this process on **ALL WORKSTATIONS AND SERVERS**

Adding a FEP to the System Configuration

1. Within the **SWS,** open configuration (Maintenance → Setup → Configuration)
2. Select the button for **Edit** mode.
3. From within the Application and Server navigation pane, highlight the **FEP**
4. Change the **start status** from disabled to **Manual Start,** then select **Save**.
5. Repeat these steps for any additional systems as needed.

6. Open the **MSM**, then **Start** the **FEP** application on the **primary** server.

Revision #3
Created Tue, Aug 11, 2020 2:26 PM
Updated Wed, Sep 16, 2020 5:30 PM