

Manitou Core - Installing the Manitou Servers

These steps are for installing the Manitou Server. Please ensure that all prerequisites have been complete before proceeding.

Installing Manitou

All installation media for the following items can be found the installation packages on Fileserver02. Please contact the implementation team manager/director for any details or issues regarding the installation packages. It is important to note that the executable applications for the installers is ran and not the msi installers directly. This is to allow all necessary redistributables, dependencies, and components to be installed before the software.

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. Run the Distributer_Setup.exe application.
2. Select Next
3. Specify the Folder path desired (Recommended as default location on OS partition)
4. Verify Everyone is checked and select Next.
5. Confirm the installation by selecting Next.
6. When prompted, enter the name of the machine the Distributer is being installed on.
7. Select Yes to continue when the failed to contact distributer message is displayed.
8. Select Close to close the installer.
9. Open the Manitou directory created (Typically C:\Program Files (x86)\Bold Technologies\Manitou)
10. Open the Distributer folder.
11. Place the latest patches, packages, distlist and packagelist available in this Distributer folder.

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. Run the ManitouServer_Setup.exe application.
2. Accept the EULA to proceed with the installation.
3. Accept and install all framework component, runtime libraries, and redistributable installations presented.
4. Once the Bold Technologies Manitou Server installation is started, select Next to begin.
5. Specify the Folder path desired (Recommended as default location on OS partition)
6. Verify Everyone is checked and select Next.
7. Confirm the installation by selecting Next.
8. If prompted, specify the name of the distributor server.
 - This is the server name where the distributor was installed.
 - port 7007 must be open in both directions between the current server and distributor machine.
 - The window may prompt behind the installer, if the installer seems frozen, check there is not this prompt hidden behind the installation window.
9. 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 in CRM)
10. Select the Test button and upon Successful connection, select OK.
11. When prompted, select the IP Addresses assigned to the machine.
 - IP addresses must be static
 - IP addresses specified must be IPv4, do not select IPv6 addresses even if they exist.
12. Select Ok to proceed.
13. Import any countries the customer will have customers on.
 - This step cannot be repeated once selected unless the software is uninstalled and the database removed.
14. Select Ok to proceed.
15. Select Close to close the completed installer.
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 be ran on all application servers.

1. Run the ManitouClient_Setup.exe application.

2. Accept and install all framework component, runtime libraries, and redistributable installations presented.
3. Once the Bold Technologies Manitou Client installation is started, select Next to begin.
4. Specify Both and select Next. (This is a requirement of the servers and may be different on individual workstations)
5. Enter in all the Manitou Servers that will contain an Application Server (typically all DB servers)
6. Select Next to proceed.
7. Specify the Folder path desired (Recommended as default location on OS partition)
8. Select Next and the Next again to confirm installation.
9. If prompted with a failed to contact Sentry error message, select Yes to proceed.
10. Select Close to close the installer
11. Repeat these steps on all servers needed.

FEP Installation

This installer will typically be ran on all database or application servers, however, it is not uncommon to have separate servers dedicated for FEPS.

1. Run the FEP_Setup.exe application.
2. Accept and install all framework component, runtime libraries, and redistributable installations presented.
3. Once the Bold Technologies manitou FEP installation is started, select Next to begin.
4. Check "Disable Automatic Updates" and select Next.
5. Specify the Folder path desired (Recommended as default location on OS partition)
6. Select Next and the Next again to confirm installation.
7. Select Close to close the installer
8. Repeat these steps on all servers needed.
9. If servers FEPs are installed on do not exist in CRM, add them to CRM.

DB Manager Installation

1. Run the DBManager_Setup.exe application.
2. Accept and install all framework component, runtime libraries, and redistributable installations presented.
3. Once the Bold Technologies DBManager installation is started, select Next to begin.
4. Specify the Folder path desired (Recommended as default location on OS partition)
5. Select Next and the Next again to confirm installation.
6. Select Close to close the installer.
7. Repeat these steps on all servers needed.
 - 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. Run the setup.exe application located in the BoldLicenseManager_Setup folder.
2. Accept and install all framework component, runtime libraries, and redistributable installations presented.
3. Once the Bold Technologies License Manager installation is started, select Next to begin.
4. Specify the Folder path desired (Recommended as default location on OS partition)
5. Select Next and the Next again to confirm installation.
6. 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.
- SMTP Host - support.boldgroup.com
- SMTP Port - 999 (25 is also available but regularly blocked by ISPs)
- SMTP User - Email created for customer ¹
- SMTP Password - Password for Email created for customer¹
- POP3 Host - support.boldgroup.com
- POP3 Port - 998 (110 is also available but regularly blocked by ISPs)
- POP3 User - Email created for customer ¹
- POP3 Password - Password for Email created for customer¹
- From Address - Email created for customer ¹
- Email Display Name - This is the Account Name (Up to 30 characters, alpha numeric characters only)
- POP3 Interval - 30
-

If there are any spaces after the POP3 User, Host, or Port, the License Manager service may not start.

7. Select OK to proceed.
8. Select Close to close the installer.

¹ Creating the License Account Steps

1. Connect to the hMail server (internal server, see Support or Implementation manager for details)
2. Run the hMailServer Administrator application from the desktop
3. Expand Domains and support.boldgroup.com
4. Select accounts and the the "Add..." button located to the right of the window.
5. Specify an email address up to 20 alpha numeric characters long.
6. Create a strong password.
7. Select Save and Close out of the hMailServer Administrator application.

8. Disconnect from the hMail server.
9. Store the information created in CRM under the name License Email.

Bold License Client Installation

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

1. Run the setup.exe application located in the BoldLicenseClient_Setup folder.
2. Accept and install all framework component, runtime libraries, and redistributable installations presented.
3. Once the Bold Technologies License Client installation is started, select Next to begin.
4. Specify the Folder path desired (Recommended as default location on OS partition)
5. Select Next and the Next again to confirm installation.
6. Select Close to close the installer.


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 Host Name of the server to be licensed
 - System Type - The Role of the server to be licensed
 - 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.

Applying a License

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. There are two options to use. Email request to Bold or Save to file.
 - If the license request is emailed some of the following steps will be automated.
4. Select Save to file and select the ellipsis next to the text entry field of File Name.
5. Change the directory to the desktop and specify the filename as the name of the server.
6. 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
7. Connect to the License Master server (See Support/Implementation manager for details)
8. Transfer the created licensed request file to the desktop of the the License Master server.
9. Start the Bold License Master and login (See Support/Implementation manager for details)
10. 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.
11. Select File and then Import License Action.
12. Select the ellipsis next to the text entry field of File Name and then open the license request located on the desktop.
13. Verify the Central Station Name and Machine Name to be imported and select OK.
14. Navigate to and select the Central Station from the listing on the left
15. Right click on the license action created. (The Machine column will match the Host name the request was created on)
16. Select Create License Key.
17. 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.
18. Once all license options are filled, the license response can be emailed back or saved to

file.

- If the license response is emailed some of the following steps will be automated.
- Licenses should be created by default with 185 days expiration unless otherwise specified.

19. Select Save to file and then click the ellipsis next to the text entry field of File Name.
20. Specify the same name with fin added to the end to identify this is the response file and save to the desktop.
21. Transfer the generated license response files from the License Master desktop to the Bold License Client Server's desktop.
22. Open the Bold License Client Server if not already open
23. Select File and Manual License Update...
24. Select the ellipsis next to the text entry field of File Name and then open the license response located on the desktop.
25. Verify the Machine Name to be licensed and select OK.
26. The license may take a few moments to apply.
27. Once applied a Success message stating "successfully updated the license" will appear. Select OK to acknowledge
28. Repeat the license steps above for any additional servers to be licensed.
 - It is recommended all license requests, updates, and responses are done simultaneously.
29. Delete all generated blc files from the License Master and Bold License Client servers' desktop.
30. 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 exist 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.

Update and DB Manager Configuration

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

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 the 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.
4. Select Send a package
5. Enter in 2 for the Package No: text field and select Send Change.
6. 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.
7. Repeat the process of sending packages to send package 1.
 8. Once 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"
 3. Right click on the server and select Restart.
 4. Close the Services window.
 10. Start the Distributer Commander again.
 11. Select the Servers and Right click on the group again to select Update to Latest Patch.
 12. Select Send Files to push the update
 13. After the patch is applied it will show the Patch Number applied under the Patch No column.
 - If the Patch No does not update within a few moments, verify the following.
 - Was the Bold Distributer service restarted
 - Attempt to restart the Distributer Client and try again.
 - Check for additional errors in the logger.

Configuring the 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
 1. Right click on the DB Manager application icon located on the desktop.
 2. Select Properties
 3. Verify the Shortcut tab is active and select the "Advanced..." button.
 4. Check the box "Run as administrator" and select OK
 5. Select OK on the Properties window to save changes.

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



3. Select 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 Host 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 Database are entered, select File → Save (or press Ctrl+S)
7. Set the File name as DBMAN and save in the Bold Technologies folder (Typically C:\Program Files (x86)\Bold Technologies)
8. Continue configuration by selecting 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 (or other user is 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

Replication Agent Windows Account
MSSQL

Replication Agent Windows Password
●●●●●●●●●●

Working Directory
SNAPSHOT

Manitou Customer Activity
 All 999 Previous Months

Distributor Location
 Local Distributor

10. Save changes made (Ctrl + S) and 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. Select File → Open (Or press Ctrl + O)
3. Open the DBMAN.dbsystem file (should be located in C:\Program Files (x86)\Bold Technologies)
4. Select Database Updates
5. From the database dropdown select the first database server installed.
6. Verify the Database Update Type contains the correct version identifier and select Apply.
7. Repeat Update steps for any additional database servers installed.
 - This can be done from the same DB Manager, it is not necessary to run the DB Manager installed on other servers.
8. Select the Health Check tab on the right of the DB Manager window.
9. From the database dropdown select the first database server installed.
10. Select the magnifying glass located below the Schema File text entry window.
11. Open the latest MANITOU_SCHEMA.xml file.

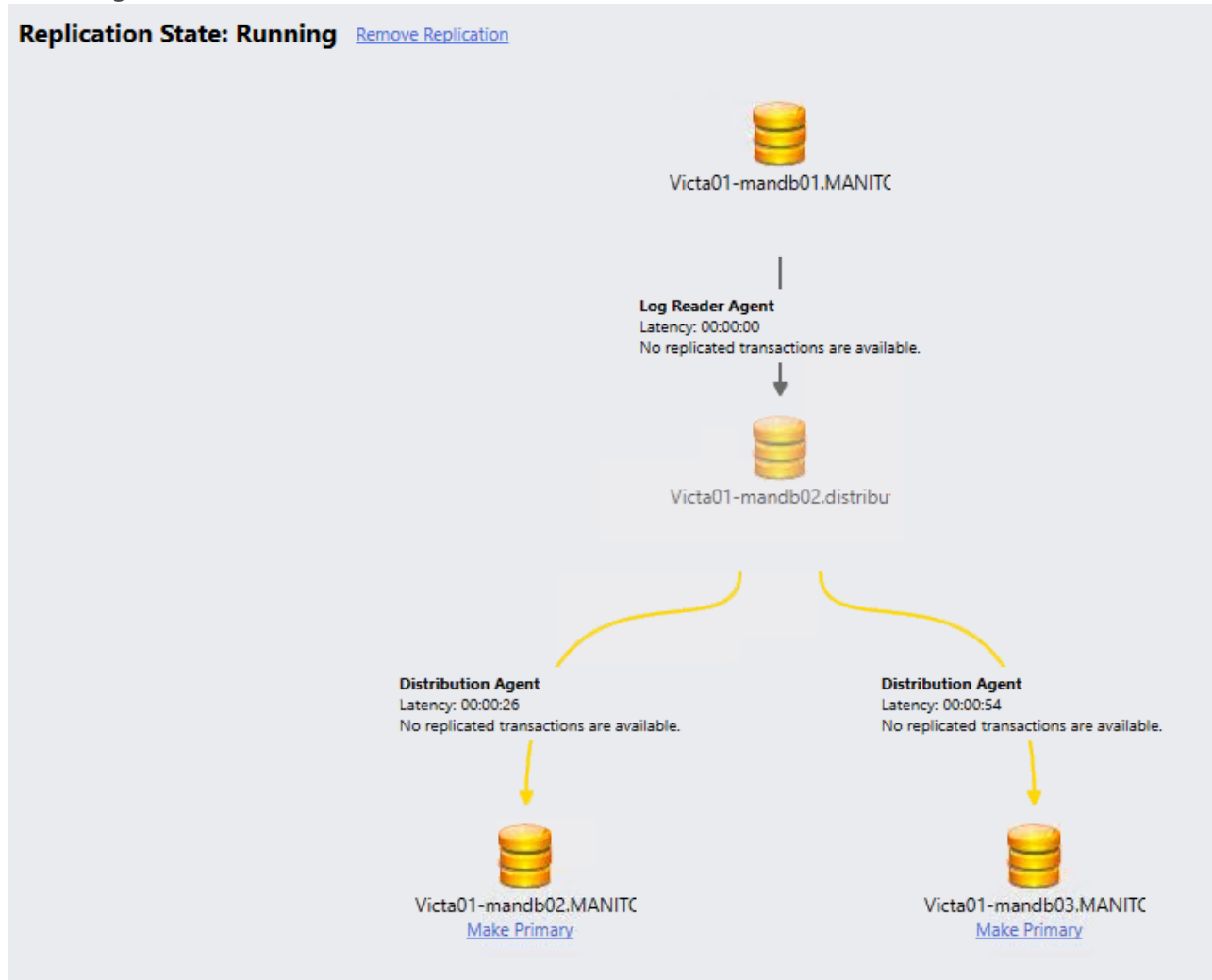
- This should be located directly in the Manitou directory (C:\Program Files (x86)\Bold Technologies\Manitou)
 - If it is not in the Manitou Directory, it is located in the patches within the Distributer folder.
 - Ensure the latest MANITOU_SCHEMA.xml file is being used to avoid critical issues later in the install.
12. Once the Schema File is specified, select Check Database.
 13. The health check will populate with Database Modification Required.
 14. Select All modification and then select Apply Changes.
 15. Once all Changes are applied select Check Database again to ensure all changes were applied and nothing more needs to be completed.
 16. Repeat Health Check steps for any additional database servers installed.
 - This can be done from the same DB Manager, it is not necessary to run the DB Manager installed on other 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. Select the Manage Replication tab under Activities.
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

Here is where 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.

1. Configure the MSM (May already be configured)
 1. Start the MSM Config (Start → Bold Technologies → MSM Config)
 2. Select Edit and Enter in the configuration details.
 - Configuration Name - System 1 (additional servers should have incrementing system numbers, i.e. System 2, System 3, etc)
 - Computer - Host Name of the server where the Manitou Server installer was ran.
 - Database Service - MSSQLSERVER
 - Backup Db Service - MSSQLSERVER
 - Server Name - Host Name of the server where the Manitou Server installer

was ran.

- 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.

2. Start the Manitou services.

1. Open the MSM on the first install database server. (this will now be referred to as the primary server)
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

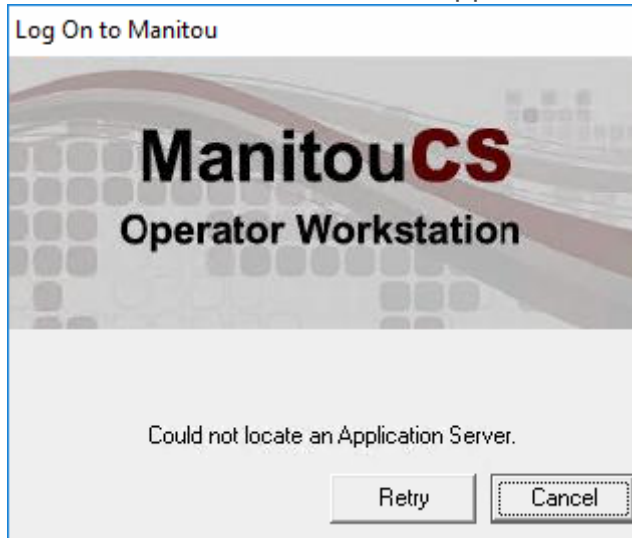
3. Start both Workstation Clients as administrator and Authorize.

1. Right click on the Supervisor Workstation and select 'Run as Administrator'.
2. Log in to the client
 - Default User - BOLD
 - Default Pass - a
3. Accept the Software Use Agreement
4. From the SWS (Supervisor Workstation) Navigate to the workstation list (Maintenance → Workstations)
5. Verify the entry for the current machine is set to Protected Area for the Security Level.

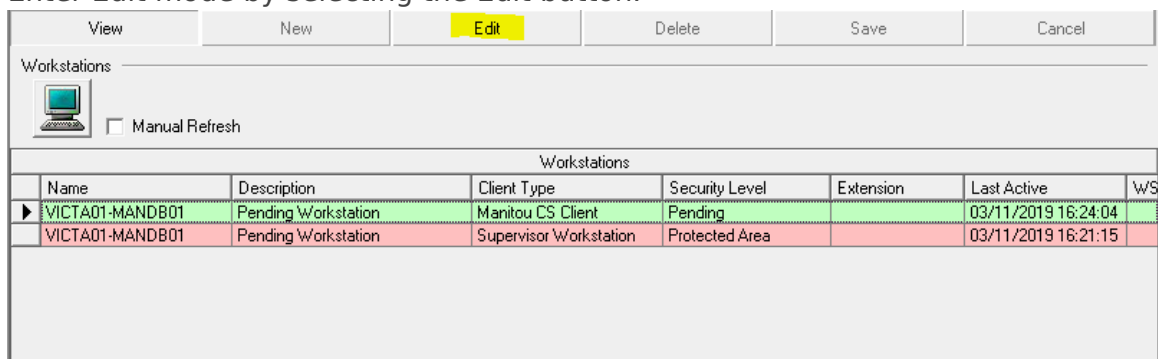
Workstations				
	Name	Description	Client Type	Security Level
▶	VICTA01-MANDB01	Pending Workstation	Supervisor Workstation	Protected Area

6. Keep this window open or minimized and start the OWS (Manitou Workstation) as administrator.
- 7.

The client will fail to locate an application server.



8. Leave this window open and go back to the Workstation list within the SWS.
9. Enter Edit mode by selecting the Edit button.

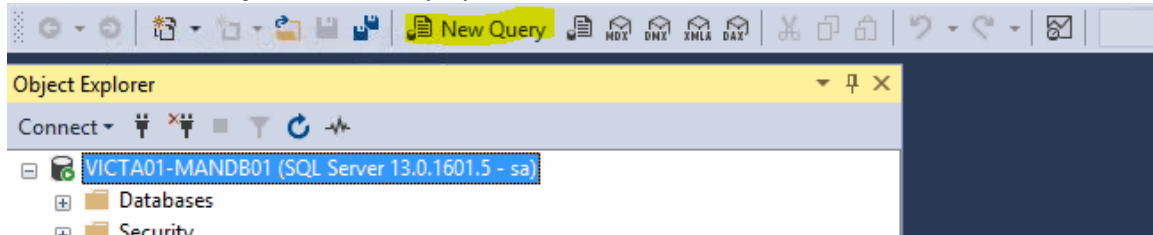


Workstations						
Name	Description	Client Type	Security Level	Extension	Last Active	WS
VICTA01-MANDB01	Pending Workstation	Manitou CS Client	Pending		03/11/2019 16:24:04	
VICTA01-MANDB01	Pending Workstation	Supervisor Workstation	Protected Area		03/11/2019 16:21:15	

10. Change the security level of the newly added Manitou CS Client from Pending to Protected Area.
 11. Save changes by selecting the Save button.
 12. Navigate back to the OWS Log On To Manitou window and select Retry.
 13. Login to OWS
 - Same user credentials as used for the SWS.
-
4. Add the FEP to the system configuration.
 1. Within the SWS, open configuration. (Maintenance → Setup → Configuration)
 2. Enter Edit mode
 3. from within the Application and Server listing, select the FEP
 4. Change the start status from disabled to Manual Start.
 5. Save Changes.
 5. Copy the newly created configuration to any additional system configurations needed.
 1. Open SSMS (Start → Microsoft SQL Server Tools 17 → Microsoft SQL Server Management Studio 17)
 2. Verify you are connecting to the correct server and login.
 - Configuration changes should be done using the sa user, login credentials

should be located in CRM.

3. Select New Query from the top quick task bar.



4. Copy the query from the [Copy Configurations SQL Script](#).
5. Paste the query into the new query window.
6. Fill in the required details specific to this new install in the pasted SQL Query.

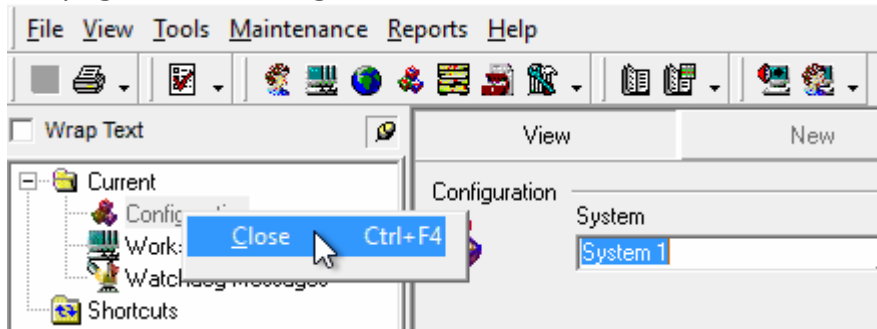
- **@SYSNOCURRENT** = '1'
- **@SYSNONEW** = '2'
- **@SYSDESCNEW** = 'System 2'
- **@DEVICENOCURRENT** = '1'
- **@DEVICENONEW** = '2'
- **@NEWMACHINENAME** = '<Name of second db server>'
- **@NEWDEVICEIP1** = '<IPv4 address of second db server>'
- **@NEWDEVICEIP2** = '<secondary IPv4 address of second db server>' (can be *NULL* if there is none)
- See screenshot for example of data filled

```
-----  
/* USER NEEDED INPUT */  
-----  
--Enter System Number of Already existing System Configuration  
SET @SYSNOCURRENT = '1'  
  
--Enter New System Number for new SYSTEM Configuration  
SET @SYSNONEW = '2'  
  
--Enter New System Configuration Name  
Set @SYSDESCNEW = 'System 2'  
  
--Enter Device Numbers that need to be copied  
SET @DEVICENOCURRENT = '1'  
  
--Enter New Device Numbers  
SET @DEVICENONEW = '2'  
  
--Enter New Machine Name  
SET @NEWMACHINENAME = 'victa01-mandb02'  
  
--Enter New Machine IP  
SET @NEWDEVICEIP1 = '10.8.4.15'  
  
--Enter New Machine IP Secondary (If Exists) KEEP AS NULL UNLESS DATA EXISTS  
SET @NEWDEVICEIP2 = 'NULL'
```

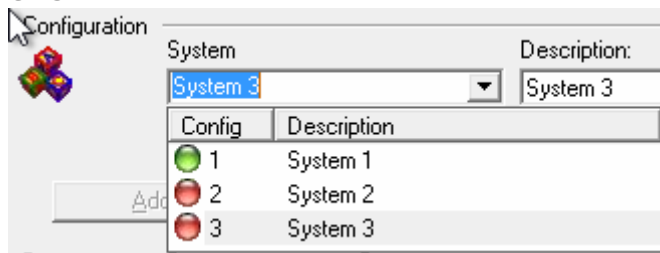
7. Once the data is entered, run the query by either selecting Execute or pressing F5.

8. For additional servers, repeat steps 6 and 7.
 - Each new server will need to increment **@SYSNNEW**, **@SYDESCNEW**, and **@DEVICENNEW**
 - Verify each new server/configuration added has a unique name and IP. These can not be duplicated in the database.

9. Verify the added system appear with the configuration list in the SWS.
 1. If already open in the SWS, close the Configuration page (This is due to the configuration be cached)
 - Pages can be closed by pressing Ctrl + F4 or by right-clicking on the page and selecting close.



2. Open the configuration screen (Maintenance → Setup → Configuration)
3. Select the drop down under System and verify all new added systems exist.



Revision #20

Created Thu, Mar 7, 2019 9:08 PM

Updated Fri, Apr 24, 2020 10:14 PM