



SynergyTM

Student Information System

Synergy SIS[©] **System Installation Guide**



Edupoint Educational Systems, LLC
1955 South Val Vista Road, Ste 210
Mesa, AZ 85204
Phone (877) 899-9111
Fax (800) 338-7646

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This edition applies to Synergy SIS™ Student Information System software and all subsequent releases and modifications until indicated with new editions or revisions.

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The screens, procedural steps, and sample reports in this manual may be slightly different from the actual software due to modifications in the software based on state requirements and/or school district customization.

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ABOUT THIS MANUAL

Edupoint Educational Systems develops software with multiple release dates for the software and related documentation. The documentation is being released in multiple volumes to meet this commitment.

The table below lists the release date, software version, documentation volume number, and the content included in each volume of documentation to date.

Software and Document History

Date	Volume	Edition	Revision	Content
October 2009	1	1	1	Initial release of this document
March 2010	1	1	2	Updated for the November 2009 release and the February and March 2010 patches.
July 2011	1	1	3	Updated for the July 2011 release
August 2012	1	1	4	Updated with the most current hardware and software requirements
March 2013	1	1	5	Updated for the February 2013 release

CONVENTIONS USED IN THIS MANUAL

Bold Text

Bold Text - Indicates a button or menu or other text on the screen to click, or text to type.



Tip – Suggests advanced techniques or alternative ways of approaching the subject.



Note – Provides additional information or expands on the topic at hand.



Reference – Refers to another source of information, such as another manual or website



Caution – Warns of potential problems. Take special care when reading these sections.

BEFORE YOU BEGIN

Before installing any of the Edupoint family of software products, please be sure to review the system requirements and make sure the district's computer hardware and software meet the minimum requirements. If there are any questions about the system requirements, please contact an Edupoint representative at (877) 899-9111.



Caution: The Edupoint family of software does not support the use of pop-up blockers or third-party toolbars in the browser used to access Synergy SIS. Please disable any pop-up blockers (also known as pop-up ad blockers) and extra toolbars in the browser before logging into any Edupoint product.

At any point, if there are any technical difficulties, please contact the Edupoint technical support team at support@edupoint.com or by phone at 1-877-899-9111 option 1.

Chapter One: OVERVIEW

In this chapter, the following topics are covered:

- ▶ Overview of installation
- ▶ Implementation considerations
- ▶ Sample deployment configurations

OVERVIEW OF INSTALLATION

The Synergy SIS software has three main components: the web server, the process server, and the database server.

- The **database server** houses the database for all districts and schools. Unlike other student information systems, all data is kept in one database for all schools for all years, which simplifies the system administration and reduces duplicate data entry and errors.
- The **process server** processes all reports and other jobs that may be resource-intensive such as the new year rollover. By separating these jobs onto a separate server or servers, this improves performance for the end-user.
- The **web server** presents the end user interface. The software is accessible via a web browser, and it has four interfaces – one for teachers called TeacherVUE, another for teachers using Grade Book, another for parents and students using the ParentVUE or StudentVUE portals, and another for all staff as the main Synergy SIS interface.

Each of these three main components may also be configured as a separate testing and/or training environment. There are also other software programs that integrate with the Synergy SIS software but are installed separately, such as the Generic Conversion software. The installation of the three main components, the training/testing software, and the other software programs is covered in Chapter [Three](#) of this guide.

Prior to installation of the software, there are a number of hardware and software requirements that must be configured. These requirements are outlined in Chapter [Two](#) of this guide.

Synergy SIS is constantly being improved and refined based on user feedback. A major software upgrade is available once a year in November, and continuous enhancements (CE) and targeted updates (UT) are released as frequently as once a month. Edupoint offers all software releases free of charge to current customers. Instructions for installing these releases are available in Chapters [Four](#) and [Five](#) of this guide.

IMPLEMENTATION CONSIDERATIONS

When determining how to install and configure Synergy SIS, there are several factors to take into consideration. These factors include:

How will the software be accessed?

Synergy SIS is a web-based system accessible via any Internet browser. Consequently, it can be accessed via a district's internal LAN/WAN environment or it can be accessed over the Internet. Alternatively, it can be setup as a mixed system where parents & students access the information over the Internet using the ParentVUE & StudentVUE software, and staff & teachers access it over the LAN. Only the web servers need to be accessed by the end users, and the web servers can be configured with dual NICs to communicate with the process servers and database servers secured in the LAN environment.

How many servers will be purchased, and what types of servers?

Synergy SIS has three main components – the web server, the process server, and the database server. The database is generally installed on only one server, protected in the LAN environment. Depending on the size of district, multiple process and web servers may be needed to handle the number of users accessing the system. For more information about server sizing, please see the section on [Recommended Hardware Configuration](#) in Chapter Two.

What additional software will be installed?

Besides the three major components, there are also several smaller software programs that integrate with the Synergy SIS software. The district needs to decide which software programs will be installed, and where these programs will be installed. For a list of these programs, please see the section on [Other Synergy SIS Software Installation](#) in Chapter Three.

Will separate testing and training environments be needed?

In addition to the main production environment, Synergy SIS can also be setup in a separate configuration for testing and training. The district will need to decide how many testing & training environments will be configured, and where these environments will be setup.

How many end users will be accessing the system, and what types of users?

Synergy SIS has a separate software program, the ParentVUE & StudentVUE software, which can be installed for use by parents and students. There is also a separate interface for teachers called TeacherVUE. To help determine the configuration of the Synergy SIS installation, it will be necessary to estimate how many of each type of users will be accessing the software at the same time.

How will the software be introduced to the staff?

Many districts implement Synergy SIS in stages. Perhaps only the elementary schools are converted and transitioned to Synergy SIS one year, and then the high schools the next year. Smaller districts may choose to convert the entire district in one year. Sometimes Synergy SIS is run in parallel with the old system for a time until everyone is trained and comfortable with the new software. For more about data conversion, please see the *Synergy SIS – Data Conversion Guide*.

SAMPLE DEPLOYMENT CONFIGURATIONS

When determining what pieces of Synergy SIS are installed on which servers, several factors to consider include:

- What servers will be used for the Synergy SIS Production and/or Synergy SIS Testing/Training web servers
- What web servers, processes and organizations will be supported by each process server
- Where the training/testing database and the production database will be located

There are a number of ways to implement Synergy SIS. These install instructions will work for each of these implementations. The key is to complete the install process step for each

type of server completely. For example, if there are multiple web servers, complete the update to each of them before updating the process servers.

Possible Server Configurations

Stand Alone

The simplest implementation is a single server. In this example, the web site (IIS), process server, and database are all installed on the same server. This would be appropriate for a very small school district, or possibly for a training or test environment.



Figure 1.1 – Stand-Alone Server

Two-Server Configuration

A two-server configuration could be implemented with two possible scenarios. The first would be with IIS and the process server on the web server and the database on the other. This setup isolates the database, but may result in a slower response time to the user when a user is running reports, queries, or batch processes. The second scenario is to have IIS only on the web server, and the process server and database on the second server. This should result in a more consistent user response time regardless of the work being performed by the process server.

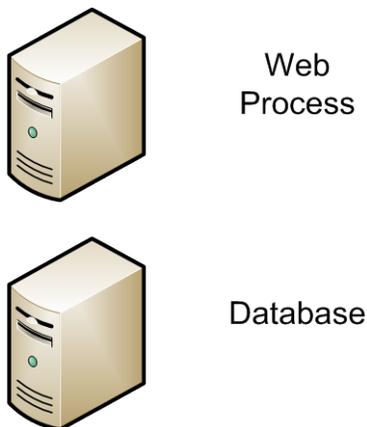


Figure 1.2 – Two Servers (Database)

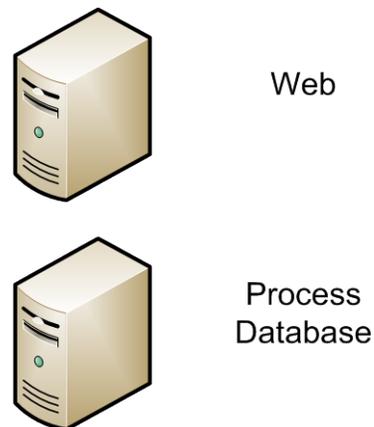


Figure 1.3 – Two Servers (Web)

Web Farm

This configuration is ideal for large school districts with many users. Here multiple IIS web servers [termed a web farm], and multiple process servers are implemented along with a single database server. The number of users and the size of the district determine the number of web servers and process servers needed. This configuration ensures a good users response time regardless of the large number of users in the district.

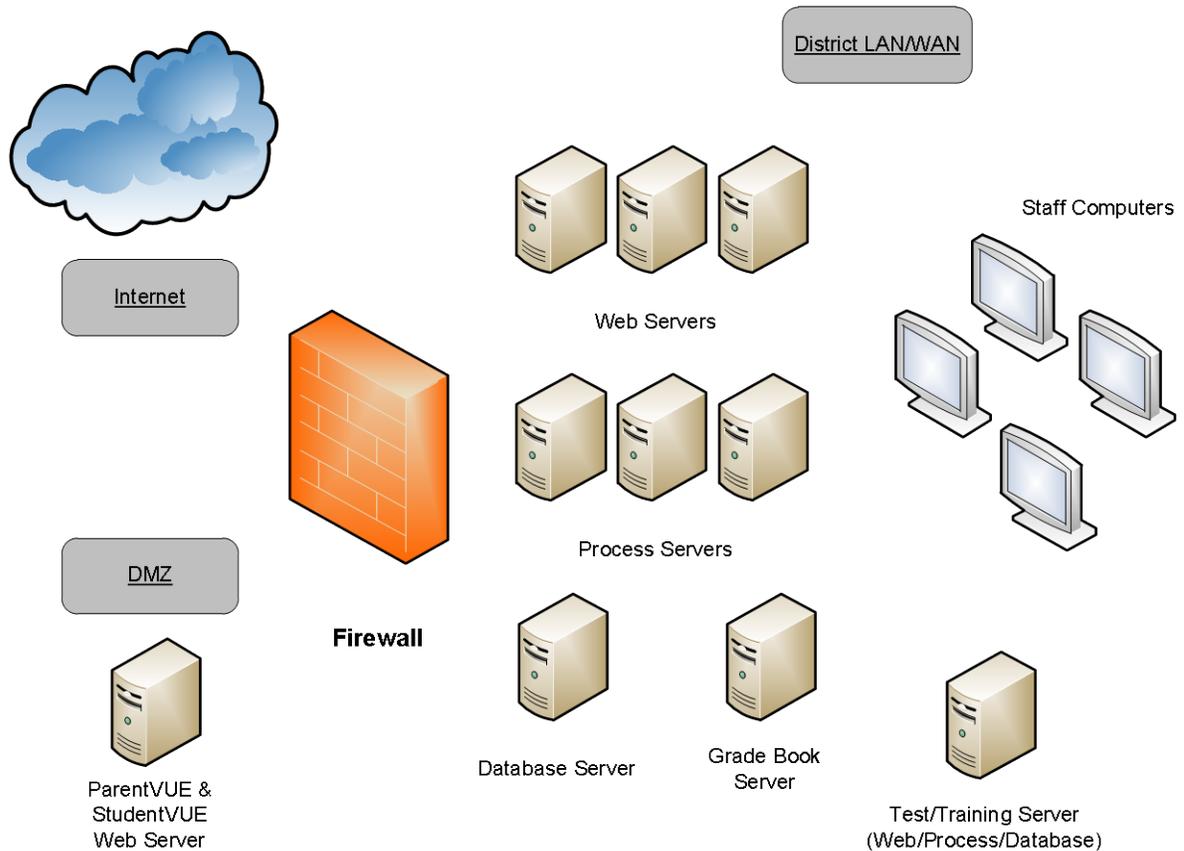


Figure 1.4 – Sample Internal Network Configuration

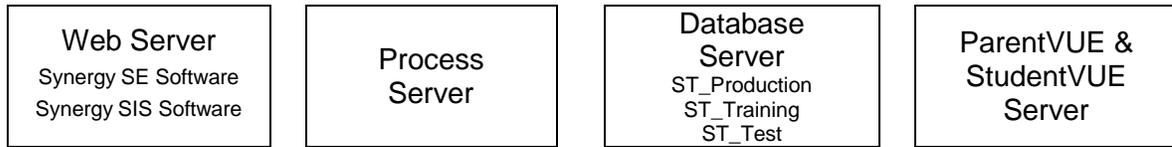
Chapter Two: PREPARATION

In this chapter, the following topics are covered:

- ▶ Recommended systems configuration
- ▶ Pre-installation preparation
- ▶ .NET Configuration
- ▶ Database Configuration
- ▶ How to download the latest release
- ▶ How to install the demo database

RECOMMENDED HARDWARE CONFIGURATION

Synergy SIS distributes the primary functions of the Synergy SIS software over three types of servers; web, process, database. ParentVUE & StudentVUE may also be installed on a separate web server to set different access or security rights to that server.



Edupoint recommends:

- one or more separate computers for each of these four server types
- at a minimum, customers acquire, configure, and maintain separate computing environments for Production, Training, and Testing.

- **Web servers** are the front-end servers that host the website for the end users.
- **Process servers** run the reports and other resource-intensive processes. These processes are usually started and controlled through the web front-end.
- **Database servers** store all student data.
- **ParentVUE & StudentVUE servers** are additional web servers that provide read-only data to students and parents through a web browser. These servers must be accessible from the Internet.

Schools and districts should carefully consider the computing power they put in place to support each of these three server functions within their production, training, and testing environments. While all of these server functions could reside upon one underlying computer, Edupoint recommends one or more separate computers for each of these functions. Edupoint also strongly recommends that separate production, training and testing environments be maintained.

The key variable that will determines the number of servers needed for each function is the number of end users using the various functions at the same time. Be sure to take into consideration daily and seasonal spikes in usage such as the start or end of the school day, the start of a school year or semester, report card generation, or year-end processing.

Since everyone's budgets are tight, it may not be possible to purchase enough servers to handle the time periods when peak loads occur. Possible strategies that can be deployed to minimize or handle spikes in server demand are:

- Stagger deadlines across the district.
- Establish different "acceptable performance" standards for normal and peak demand periods and also for the type of job (e.g., data entry vs. report preparation and printing, etc.), and include these standards in any end-user training.
- Be prepared to adjust priorities for the job queuing algorithm on the servers in the server farm to favor critical users/jobs over non-critical users/jobs, or direct less time sensitive but resource intensive processes such as printing and reporting to specific servers.

- Size and configure the servers based on the end user's assessment of peak loads.
- Be prepared to temporarily ramp up the available server time to support events that cause a spike in demand.

Tools that can help monitor server usage and assist with load balancing include the tools provided in Microsoft Advanced Server 2003 or 3rd party software such as SysTrack. Prior to Synergy SIS deployment, load simulation software may help a district determine the exact configuration needed for their environment.

Please refer to the latest version of the "Edupoint Hardware and Software Requirements" document for guidelines on the hardware and software required to run Synergy.

While the guidelines in the "Edupoint Hardware and Software Requirements" provide a basis for the initial configuration, districts and schools should be prepared to quickly resize and reconfigure their computing environments based upon their own "acceptable performance" standards. If needed, Edupoint does offer consulting services at an additional cost to assist districts and school with server sizing and implementation.



Caution: Edupoint provides these recommendations, but makes no representations, warranties, or claims that by following these recommendations a given customer will experience "acceptable performance." Customers are advised to use this information in combination with their own technical knowledge and understanding of their network environment to determine the hardware configuration for the Synergy SIS servers. The above recommendations are the only recommendations made by Edupoint in regards to sourcing, sizing, and configuring servers for the installation and operation of Synergy SIS. No other recommendations are offered by Edupoint, whether stated verbally, or within other working papers, e-mails, or project documents shared prior to the date of this document. No other recommendations are valid or binding on Edupoint.

PRE-INSTALLATION CHECKLIST

Before installing Synergy SIS, the following software must be configured on installed on each server. Synergy SIS supports 64-bit installations. When installing the software listed below, the default installation options from Microsoft are fine.

Database Server

1. Install **Windows Server** (64-bit version of 2008). No roles or features are required.
2. Install anti-virus software.
3. Install **SQL Server 2008 R2 Standard 64-bit installation**, and install all service packs and updates.
4. Install all Microsoft **patches and updates**.
5. **Configure the database** as outlined in the Database Configuration section later in this chapter.
6. Setup a **database maintenance plan** through SQL Server.
7. Setup daily database backups.
8. Enable **secure remote access** for Edupoint support, and provide Edupoint with remote access information. Edupoint must have administrator-level access to the server and Windows-integrated administrator access to SQL server to install the Synergy SIS software. Remote Desktop is preferred, either through a secure VPN, from another computer accessible from the Internet via Remote Desktop, or directly to the server.

Web Servers & Process Servers

1. Install **Windows Server** (64-bit version of 2008).
2. Install anti-virus software.
3. Add the **Web Server role** for Windows 2008. Select the following features for the Web Server role in 2008:

Common HTTP Features Static Content Default Document Directory Browsing HTTP Errors Application Development ASP.NET .NET Extensibility ASP ISAPI Extensions ISAPI Filters	Health and Diagnostics HTTP Logging Request Monitor Security Basic Authentication Windows Authentication Digest Authentication Request Filtering IP and Domain Restrictions Performance Static Content Compression Management Tools IIS Management Console IIS Management Scripts and Tools IIS 6 Management Compatibility
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4. To send e-mail from Synergy SIS, install the **Default SMTP server** on one of the servers, or configure an existing e-mail server to accept SMTP traffic from the Synergy SIS servers.
5. If some web servers will be installed outside the firewall, verify that they can **communicate with the database and process servers**.
6. Install the **.NET 4.0 Framework** and set it as the default ASP .NET service (if not already). See the section in the chapter on .NET Configuration for instructions if this needs to be installed and configured.
7. For districts using the Grade Book, install **Microsoft Report Viewer 2010** on the process server. This can be downloaded from Microsoft for free at <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=6442>
8. Install all Microsoft **patches and updates**.
9. Enable **secure remote access** for Edupoint support, and provide Edupoint with remote access information. Edupoint must have administrator-level access to the server and Windows-integrated administrator access to SQL server to install the Synergy SIS software. Remote Desktop is preferred, either through a secure VPN, from another computer accessible from the Internet via Remote Desktop, or directly to the server.
10. Create a folder on every web and process server to store the Synergy SIS software (generally called **Edupoint Work Folder**). The database will be installed and setup when installing the first web server.
11. Download the **latest release** from Edupoint FTP site to the Synergy SIS folder on every web and process server. See the instructions later in this chapter on how to find and download the latest release.
12. **Extract the files** from the downloaded ZIP file.



Note – Many servers require user account access when extracting the installation files. You may need to do one of the following:

- Add the Edupoint FTP site to your trusted sites in your browser.
- Make sure that your user account setting allows changes and is unblocked.
- Remove blocks from the ZIP file before unzipping it to an installation folder.

Otherwise, the DLL files may be locked, which can cause application errors after the installation.

13. Decide if and where to install any **auxiliary Synergy SIS software**. The table below outlines some recommendations, but most tools can be installed on any server.

Software	Description	Location
DB Tools	Tool to manage the Synergy SIS database	Web server
Designer	Tool to customize the Synergy SIS software – must be purchased separately	Any workstation
Generic Conversion	Converts data from any file and imports it to the Synergy SIS database	Process server
ParentVUE & StudentVUE	A web-based interface for parents & students to access Synergy SIS data	Web server accessible to the Internet
Photo Attach	Imports photos to the Student screen	Any workstation
ST Dashboard	Tool to install patches to Synergy SIS servers & monitor servers	Process server
ST Scanning	Scans attendance and grading sheets and imports the data to Synergy SIS	Any workstation
SASI 3 Conversion	Converts SASI XP data to Synergy SIS	Process server
SASI XP Conversion	Converts SASI XP data to Synergy SIS	Process server
SIREN	Custom report development software	Any workstation

14. Create a list of the following information (as applicable):

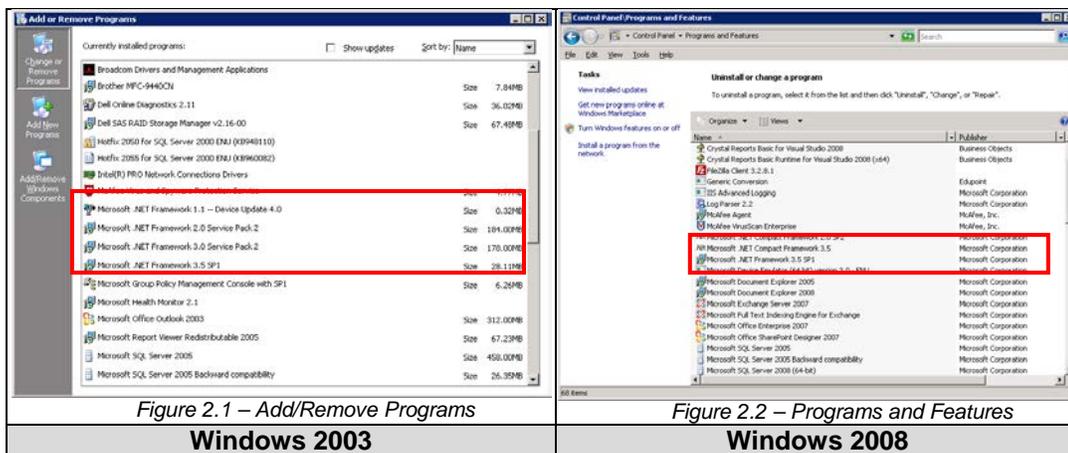
- Server IP addresses and server names
- Domain names and aliases used to access Synergy SIS
- Load balancer IP
- Admin login information for Synergy
- SA login information for SQL Server
- Rev login information for SQL Server
- PVUE login information for SQL Server
- VPN connection information, including connection method (Network Connection, VPN Client, Cisco AnyConnect, Forticlient, etc.) and login information for the server

15. Print and review this Installation Guide.

.NET CONFIGURATION

The current Synergy SIS release only works with .NET 4.0. All web servers and process servers must be running .NET 4.0 before installing the software. If .NET 4.0 is not already installed on these servers and set as the default .NET environment for the Default Website, .NET 4.0 must be installed and configured. To install and configure .NET 4.0:

1. On each server that will be a process server or web server, verify that at least Microsoft .NET Framework 1.1 is installed (or 2.0 for Windows 2008). To verify the version of .NET installed on a Windows 2003-version server, go to **Control Panel** on the server and run **Add/Remove Programs**. On a Windows 2008-version server, go to **Control Panel** on the server, and run **Programs and Features**. If the server is completely up-to-date with all recommended updates from Microsoft, it will most likely have .NET 4.0 installed already.



2. In the list of installed programs, look for Microsoft .NET Framework 1.1 or 2.0. If version 4.0 is already installed, proceed to step 8 of these instructions to verify it has been set as the default for the website. If the Microsoft .NET Framework 1.1 is not installed on Windows Server 2003, download and install it from the Microsoft website through either Windows Update or as a separate download. .NET 2.0 can also be downloaded and installed at this time if desired. .NET 4.0 may also be downloaded and installed through Windows Update if preferred.



Note – Do not remove the .NET Framework 1.1 or 2.0 prior to installing version 4.0. If the .NET Framework 2.0 is not installed, the .NET Framework 4.0 installer will download and install version 2.0 prior to installing 4.0.

3. Download the .NET 4.0 upgrade to each web server and process server. The download can be obtained from the Microsoft website at <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17851>.
4. Run the file that was downloaded – different files will be downloaded depending on the version of Windows Server installed.

5. The Microsoft .NET Framework 4 Setup wizard will display. Click the checkbox for **I have read and accept the license terms**. Then click on the **Install** button.

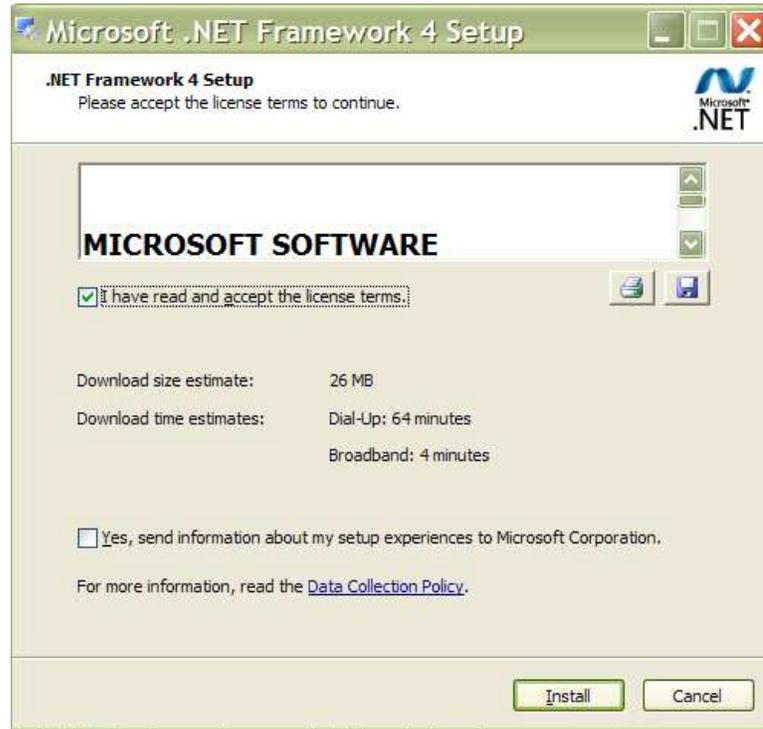


Figure 2.3 – Microsoft .NET Framework 4 Setup

6. Continue to click **Next** until the installation is complete. Leave all settings at the default choice.
7. When the installation is complete, the Setup Complete window displays. Click the **Finish** button to finish the installation.

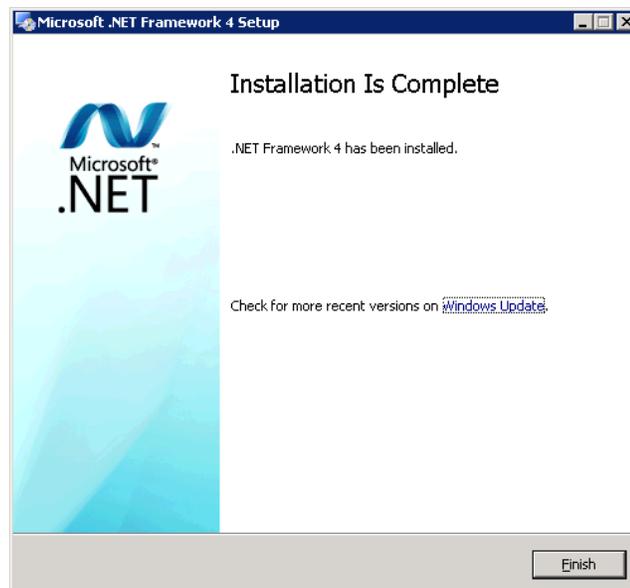
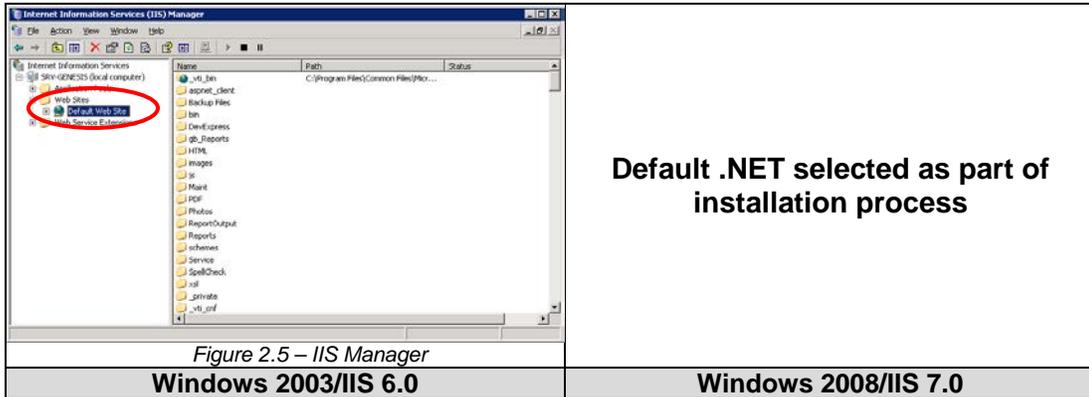
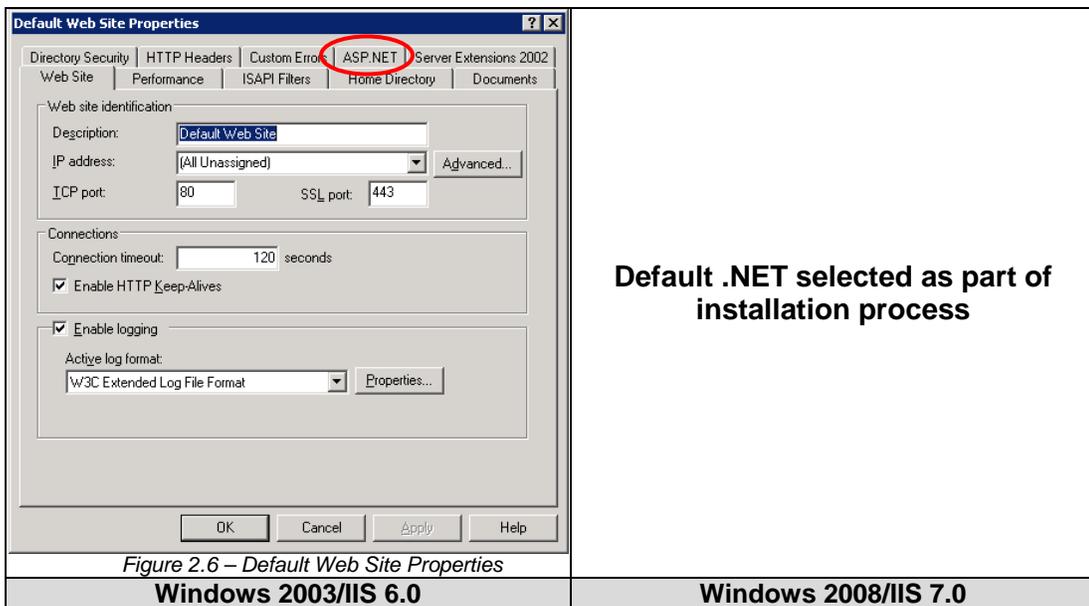


Figure 2.4 – Setup Complete

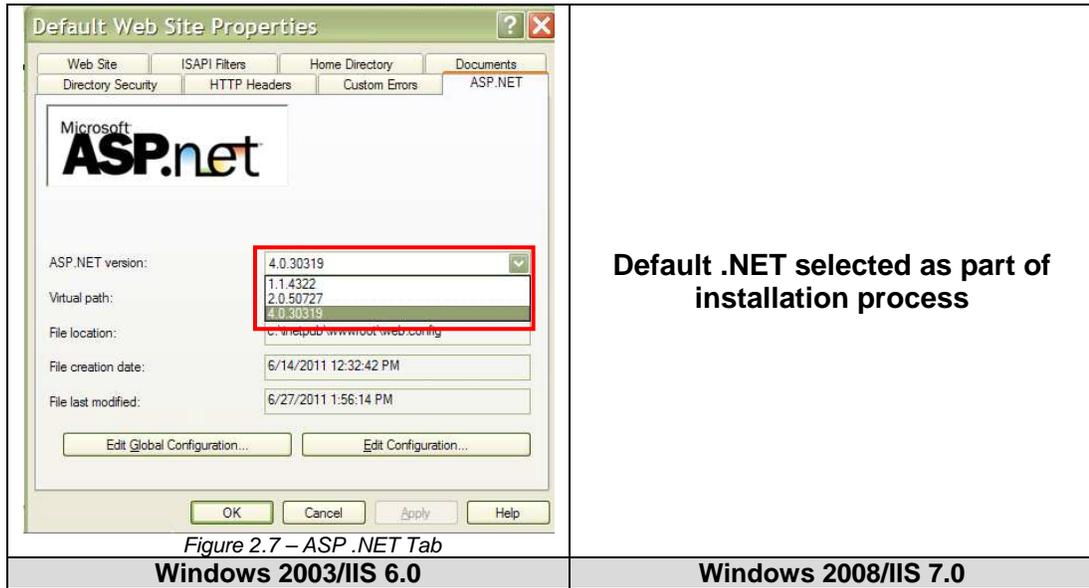
8. Next, each website must be set to use .NET 4.0 as the default. To set the default .NET in use on the website when using IIS 6.0, go to **Internet Information Service (IIS) Manager** found under **Control Panel > Administrative Tools** on the server.
9. Find the Default Web Site in the tree. **Right-click** on the **Default Web Site** and select **Properties**.



10. Click on the **ASP.NET** tab.



11. Select **4.0.30319** from the **ASP.NET version** drop-down list.



12. Click on the **Apply** button, then click the **OK** button. Be sure to do this for each web server and process server to run Synergy SIS.

In Internet Information Services 7.0, the .NET 4.0 ISAPI filters also need to be set to allowed. To configure these filters:

1. Go to **Internet Information Service (IIS) Manager**, found under Administrative Tools on the server.
2. Click on the **Server Home** page, and then double-click the **ISAPI and CGI Restrictions**.

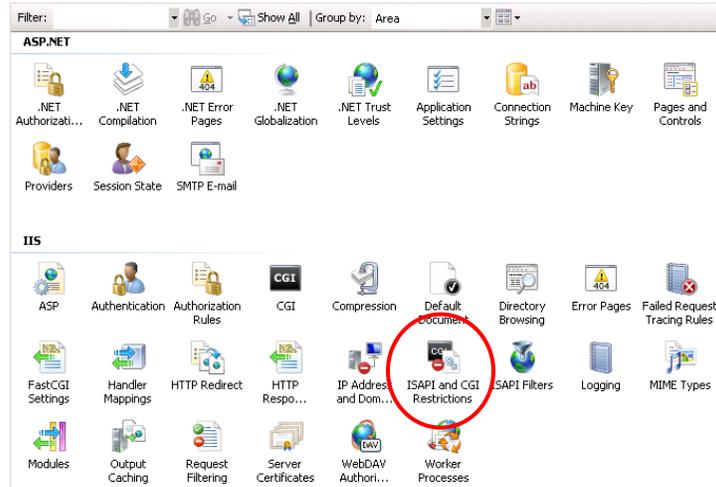


Figure 2.8 – IIS 7.0, Server Home Page

3. Double-click on each of the two entries starting with **ASP.NET v4.0**.

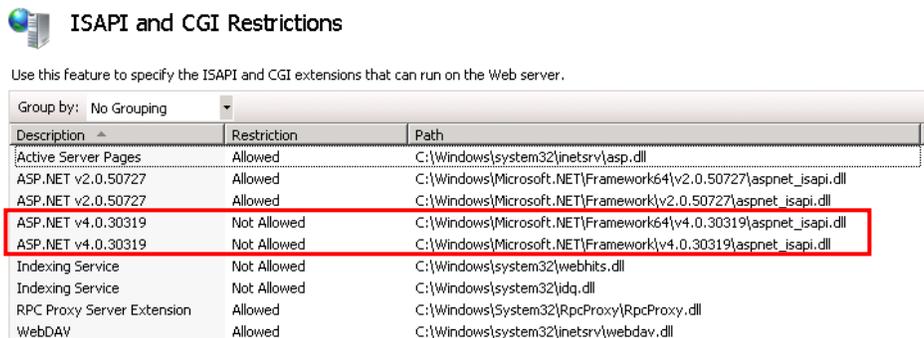


Figure 2.9 – IIS 7.0, ISAPI and CGI Restrictions

4. Check the box **Allow extension path to execute**, and then click **OK**.

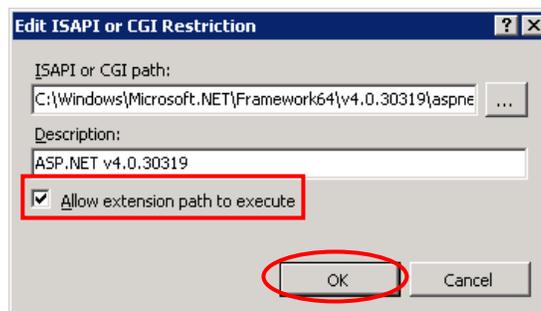


Figure 2.10 – Edit ISAPI or CGI Restriction

DATABASE CONFIGURATION

Synergy can be installed on SQL Server 2008 or Oracle 9i. If the district uses Oracle 9i, please contact the Edupoint technical support team at support@edupoint.com or call for support at 1-877-899-9111 option 1 for specific instructions.

When the web server software (ST) is installed, it also updates or setup the database. If a database exists but has no tables, the installation process will create all tables and enter default data in the tables. If a database exists, the installation process updates the database structure and updates the product-owned lookup tables.

To configure the database prior to the software installation:

1. Create the Synergy database.
2. Create a login for a user account rev.
3. Create the rev schema.

Creating the Database

To create the new Synergy database:

1. In **SQL Server Management Studio**, expand the tree to find the Databases folder and **right-click** on the **Databases** folder.



Figure 2.11 – SQL 2005/2008 Database Folder

2. Select **New Database...**, and the New Database window pops-up.

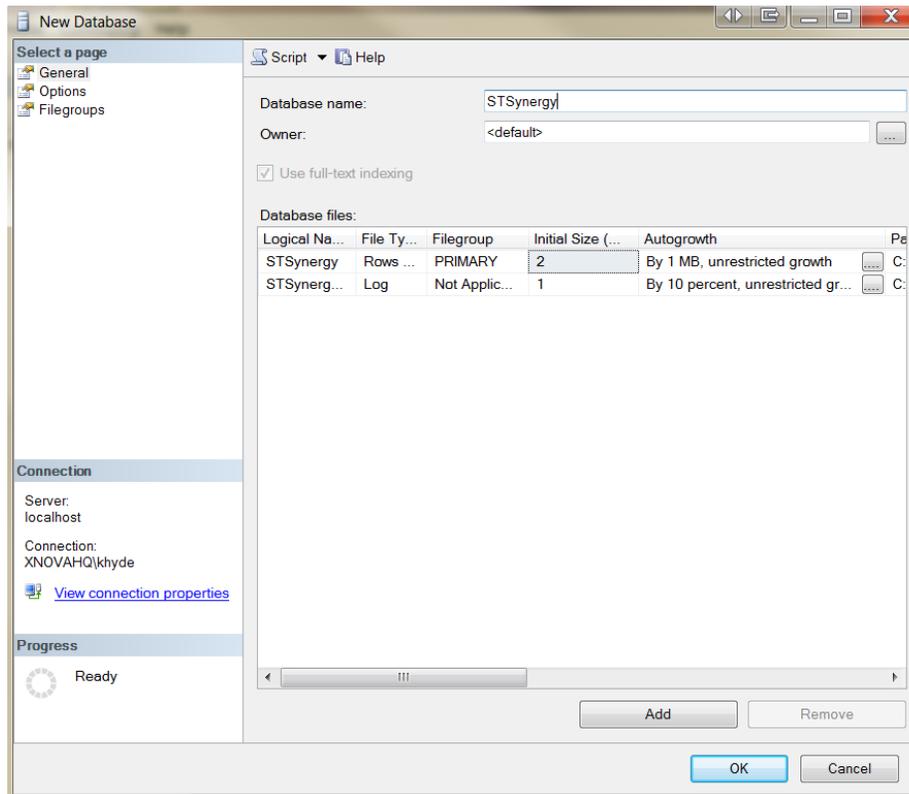


Figure 2.12 – SQL 2008 New Database

3. Enter the **Database Name**. The name should start with ST followed by the name of your district; for example, ST_Production, ST_Train, ST_Test, or ST_Demo. Click the **OK** button, and the database will be created.

Adding a Login

To create a login for the **rev** user:

1. In **SQL Server Management Studio (2008)**, expand the **Security** menu to find the Logins folder. **Right-click** on the **Logins** folder and choose **New Login**.



Figure 2.13 - SQL 2005/2008 Logins Folder

2. The Login Properties window pops-up. Enter a **Login Name**. Choose **SQL Server Authentication**, and enter a **Password**. For SQL 2008, **uncheck Enforce Password Policy**. Change the **Default Database** to the **ST** database created earlier.



Note – Edupoint provides a randomized **Login Name** and **Password** to the district in an Access document.

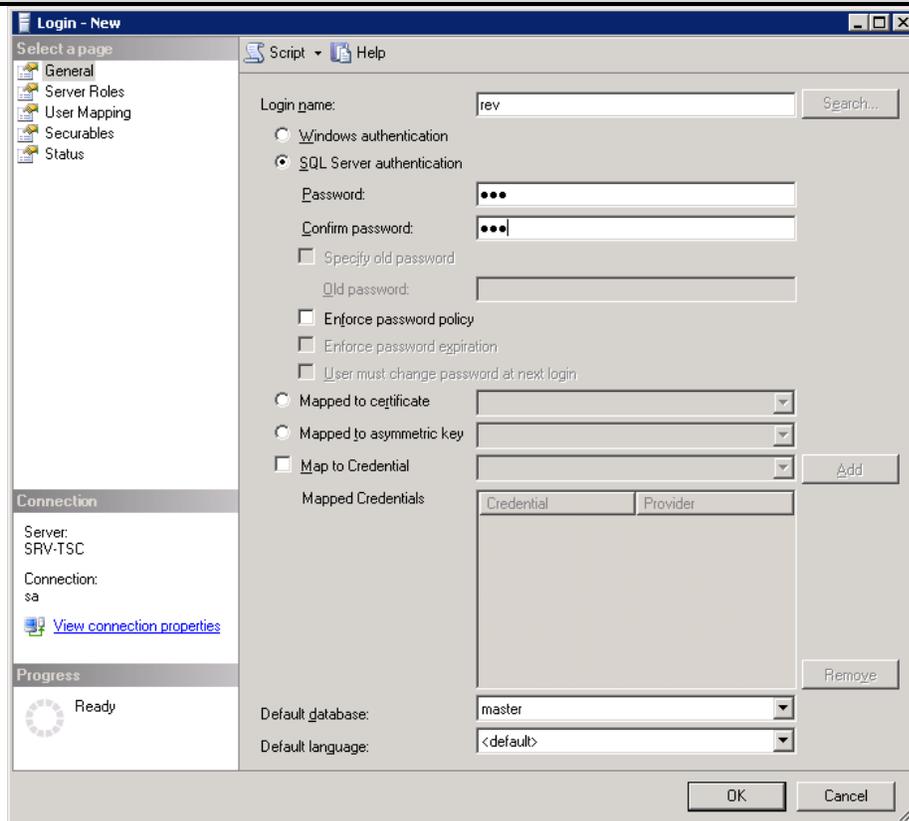


Figure 2.14 – SQL 2008 Login – New

3. Click on the **User Mapping** option.

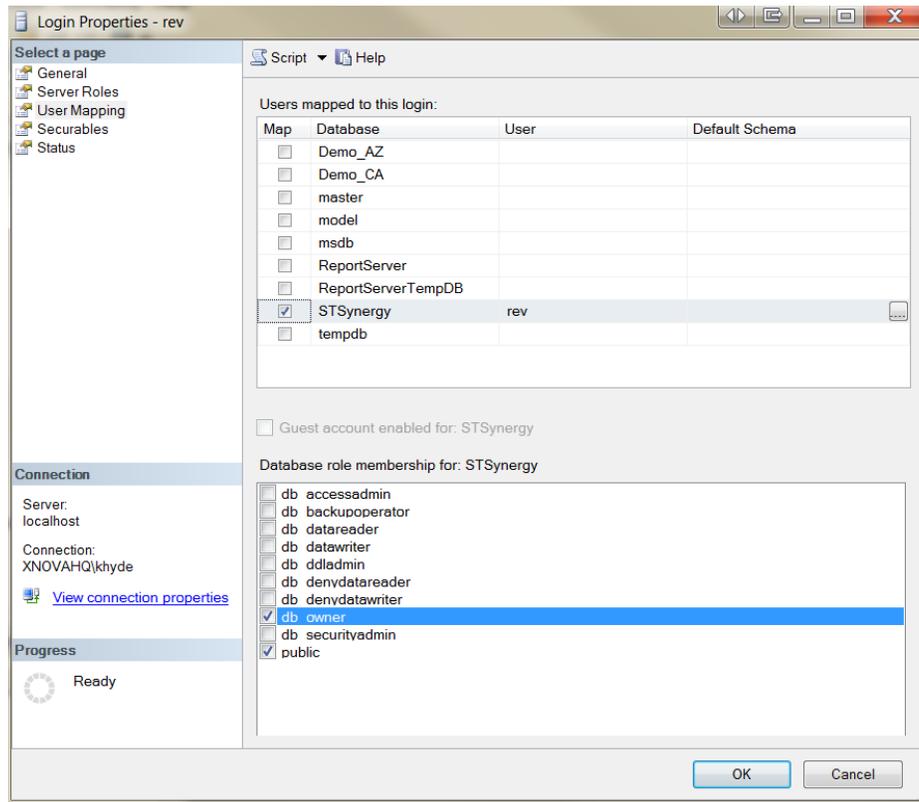


Figure 2.15 – SQL 2008 User Mapping

4. In the Database grid, **check** the name of the Synergy database (**ST...**) and enter the **username rev**. In the Database roles for the selected database, check the **db_owner** role.
5. Click the **OK** button on the dialog box.

Creating the Schema

For SQL Server 2008, a new schema also needs to be created.

To create a schema:

1. In **SQL Server Management Studio (2008)**, expand the tree to find the Schema folder (under Databases\STDDatabase\Security\Schemas) and **right-click** on the **Schema** folder.

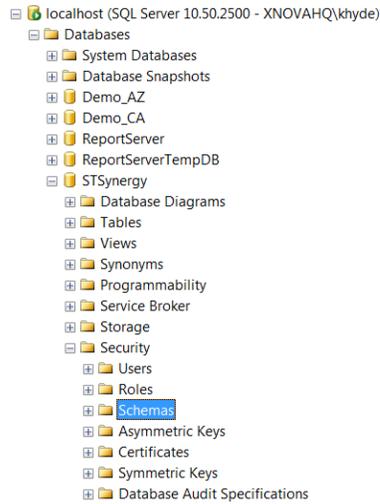


Figure 2.16 – SQL 2008 Schemas Folder

2. The Schema - New window pops-up. Enter **rev** as the **Schema Name** and **rev** as the **Schema Owner**.

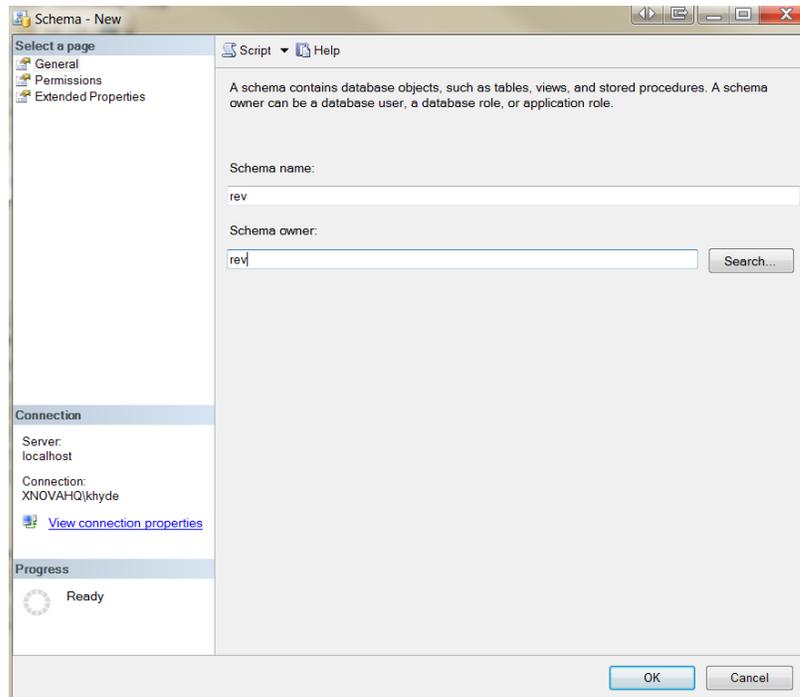


Figure 2.17 – SQL 2005/2008 Schema – New Window

3. Click the **OK** button, and the new schema is created.

Mapping the Schema to the User

After the schema has been created, it needs to be assigned to the rev login. To assign the schema to rev:

1. In **SQL Server Management Studio (2008)**, expand the tree to find the Logins folder (under the Security folder) and **double-click** on the **Logins** folder.

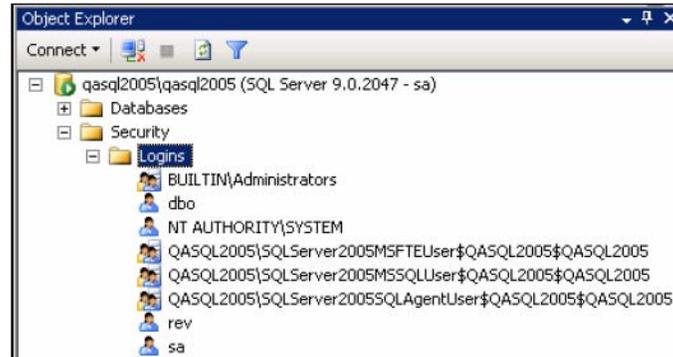


Figure 2.18 – SQL 2008 Logins Folder

2. Double-click on the **rev** icon. The Login Properties windows pops-up.

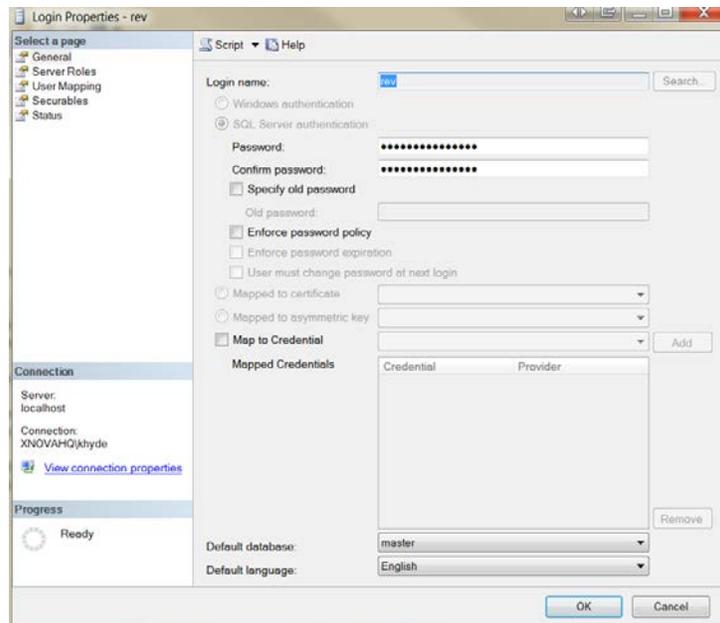


Figure 2.19 – SQL 2008 User Properties

3. Click on the **User Mapping** icon. In the **Default Schema** field of the ST database, change the text from **dbo** to **rev**.

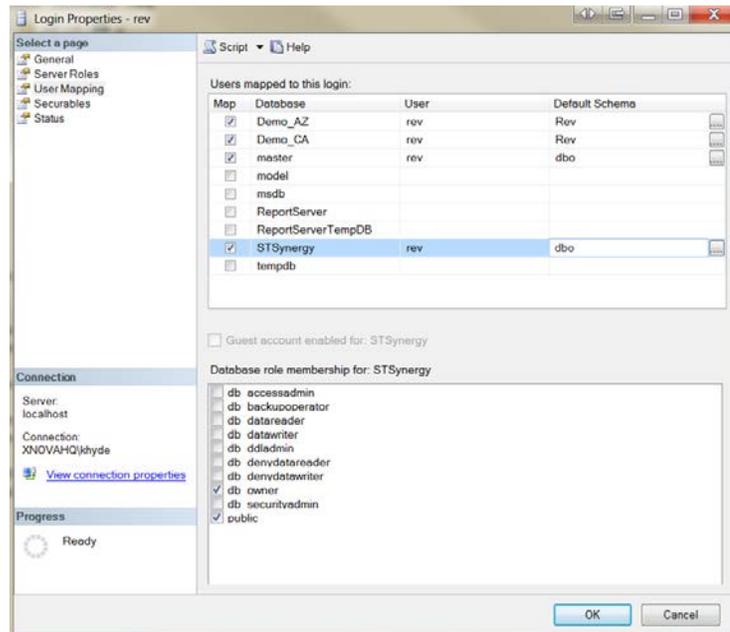


Figure 2.20 – SQL 2008 User Mapping

4. Click the **OK** button.

The database is now configured for the software installation.

OBTAINING THE LATEST RELEASE

The latest release of the software is available on the Internet through the Edupoint FTP site at <http://ftp.edupoint.com>. All Edupoint software is included in one compressed (ZIP) file. The entire ZIP file must be downloaded to install any software modules. The latest release is found in the folder labeled `_RELEASE`. Within this folder are subfolders with the version number of the release. Be sure to download the ZIP file from the subfolder with the latest version number, as the previous release may be available in this folder as well.



Note – Many servers require user account access when extracting the installation files. You may need to do one of the following:

- Add the Edupoint FTP site to your trusted sites in your browser.
- Make sure that your user account setting allows changes and is unblocked.
- Remove blocks from the ZIP file before unzipping it to an installation folder.

Otherwise, the DLL files may be locked, which can cause application errors after the installation.

The ZIP file is generally around 1.75 gigabytes. Edupoint recommends using one of the free FTP software tools to connect and download the software to ensure interrupted downloads can be resumed.

To download the latest release:

1. Connect to <http://ftp.edupoint.com>. The website requires a username and password, which has been provided to your systems administrator.
2. Open the **_Release** folder.

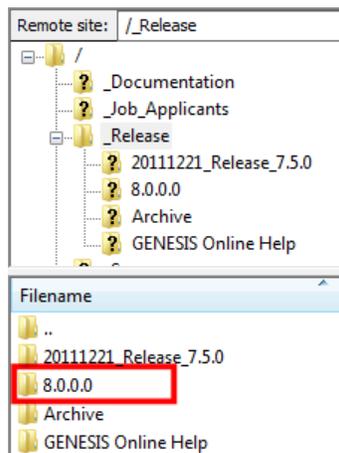


Figure 2.21 – Release Folder

3. Open the folder of the most current release. Note that there may be more than one release available. The folders are named with the version of release. For example, in the picture above you would select the 8.0.0.0 folder.
4. Inside the release folder, there are three release note files. The X.X.X.X_ReleaseNotes.pdf file contains all the changes that are new in the current release. The X.X.X.X_PreviouslyReleased_ReleaseNotes.pdf contains the notes for all the changes in the current release since the previous release. The X.X.X.X_Gap_ReleaseNotes.pdf contains issues that have been released under the previous version but not the current version. Any additional or updated documentation will also be contained in the release folder. The ZIP files contain the software. Starting with the November 2009 release, there are two zip files – ST64 for 64-bit installation and ST for 32-bit.

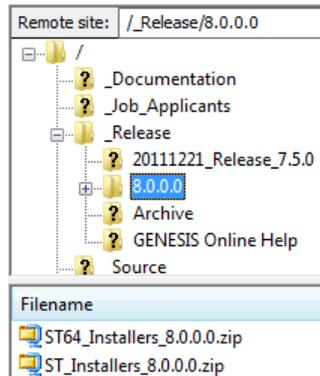


Figure 2.22 – RT Installers ZIP Files

5. Choose the ZIP file to download, and download it to the computer.

Tip: Additional information that can be downloaded from the Edupoint FTP site includes:

- **_Documentation** - includes all reference guides, quick reference cards, and technical notifications
- **_Release** - includes the latest release and any patches, and the previous releases in an archive folder
- **_Training** - includes the demo database, training manuals, and information from the user conferences.



Each client also has a private folder where they can upload and download information specific to their district. Each client folder has three subfolders:

- **Data** - any customer-specific databases
- **Documentation** - customer-specific guides or instructions
- **Patch** - any patches specific to the district

OBTAINING THE LATEST UPDATE

The latest update of the software is available on the Internet through the Edupoint FTP site at <http://ftp.edupoint.com>. All Edupoint software is included in one (PKG) file. The latest update is found in the folder labeled _RELEASE. Within this folder are subfolders with the version number of the release. Inside the folder of your version of the release is a folder labeled _Updates. Within this folder will be the folders containing individual updates. The _Updates folder will contain the latest Continuous Enhancement and the latest Targeted Update (if any) that has been released after the CE.

Updates to the software are released as Continuous Enhancements (CE) and Targeted Updates (TU). CE's updates are represented by the third number of the release version number and TU's are represented by the fourth number in the version number. To apply a CE you must first install the release. To apply a TU you must first install the release and apply the CE. For example, to apply the **7.5.10.0** CE you must first install the **7.5.0.0** release, then upgrade to the **7.5.10.0** CE. To apply the **7.5.10.13** TU, you must first apply install **7.5.0.0** release, then upgrade to the **7.5.10.0** CE, then upgrade to the **7.5.10.13** TU.



Note – Many servers require user account access when extracting the installation files. You may need to do one of the following:

- Add the Edupoint FTP site to your trusted sites in your browser.
- Make sure that your user account setting allows changes and is unblocked.
- Remove blocks from the ZIP file before unzipping it to an installation folder.

Otherwise, the DLL files may be locked, which can cause application errors after the installation.

Edupoint recommends using one of the free FTP software tools to connect and download the software to ensure interrupted downloads can be resumed.

To download the latest update:

6. Connect to <http://ftp.edupoint.com>. The website requires a username and password, which has been provided to your systems administrator.
7. Open the **_Release** folder.

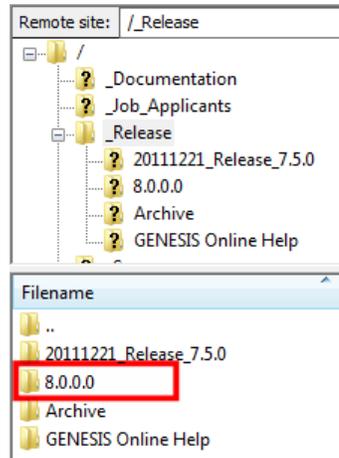


Figure 2.23 – Release Folder

8. Open the folder of your current release. Note that there may be more than one release available. The folders are named with the version of release. For example, in the picture above you would select the 20111221_Release_7.5.0 folder.
9. Open the folder of the update to apply. Note that there may be more than one update available. The folders are named with the version of the release. For example, in the picture below, you would select the 20130228_TU_7.5.10.13 folder.

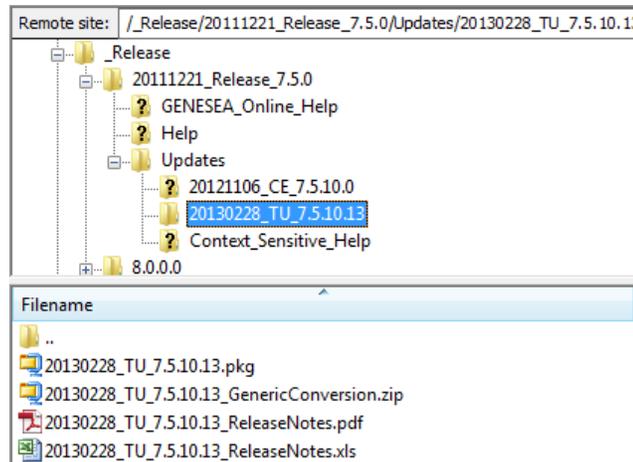


Figure 2.24 –Update Folder

10. Inside the release folder, there are at least two files. The PDF file contains the release notes for this version of the software, which outlines all of the changes since the last release. The PKG file contains the update to the software. This folder may also contain updates to offline applications as well as any additional or updated documentation.

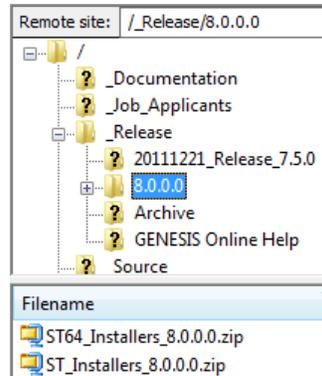


Figure 2.25 – RT Installers ZIP Files

11. Choose the PKG file to download, and download it to the computer.

Tip: Additional information that can be downloaded from the Edupoint FTP site includes:

- **_Documentation** - includes all reference guides, quick reference cards, and technical notifications
- **_Release** - includes the latest release and any patches, and the previous releases in an archive folder
- **_Training** - includes the demo database, training manuals, and information from the user conferences.



Each client also has a private folder where they can upload and download information specific to their district. Each client folder has three subfolders:

- **Data** - any customer-specific databases
- **Documentation** - customer-specific guides or instructions
- **Patch** - any patches specific to the district

INSTALLING THE DEMO DATABASE (OPTIONAL)

A database for Synergy SIS is available with demo data that can be used for training, testing and demonstration purposes. To install the demo database:

1. Download the desired demo data ZIP file from the **_Training\DemoData** folder on Edupoint's FTP site. The ZIP file contains two files: the demo database and the 'revuser' SQL Query.

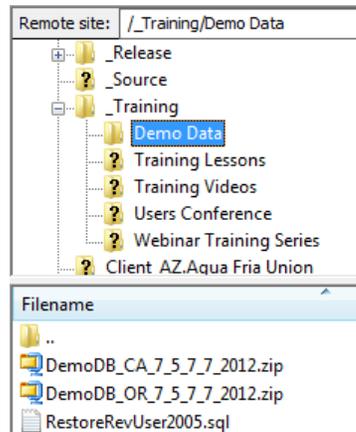


Figure 2.26 – Downloading the Demo Database

2. **Extract the files** to a folder on the database server.
3. Create a **new database** for the demo data following the instructions in the Creating the Database section earlier in this chapter. It is recommended to name the database STDemo.
4. In the **Security\Logins** folder, right-click on the **rev** account and select **Properties**.
5. The software displays the SQL Server Login Properties dialog box. Click the **User Mapping** option.

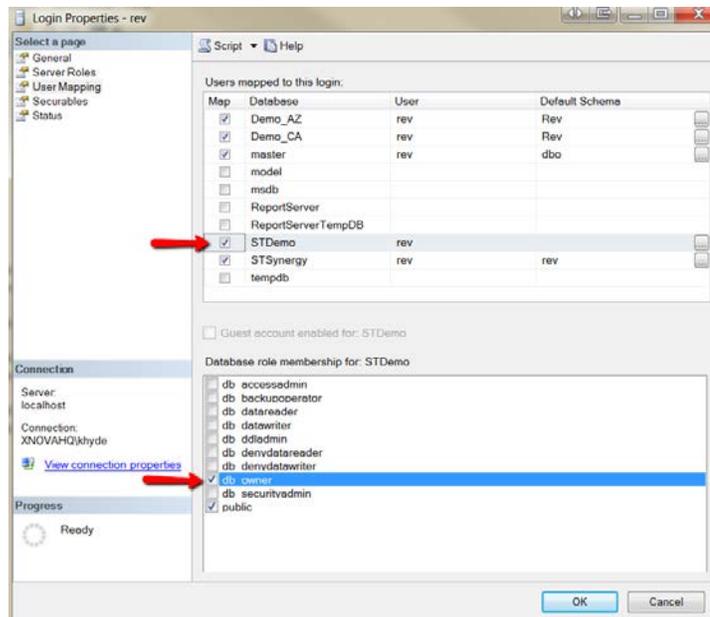


Figure 2.27 – User Mapping

6. Check the demo database **STDemo**, then check the db_owner role below.
7. Click the **OK** button.
8. **Create a rev schema** for the new demo database and **map the schema to the rev user**, as outlined in the Creating the Schema and Mapping the Schema to the User sections earlier in this chapter.
9. Import the demo database by restoring it as if from a backup. To restore the database, **right-click** on the demo database and select **Tasks>Restore>Database**.
10. The Restore Database window pops-up. Click on the **From device** option, then click on the **...** button to find the extracted file.

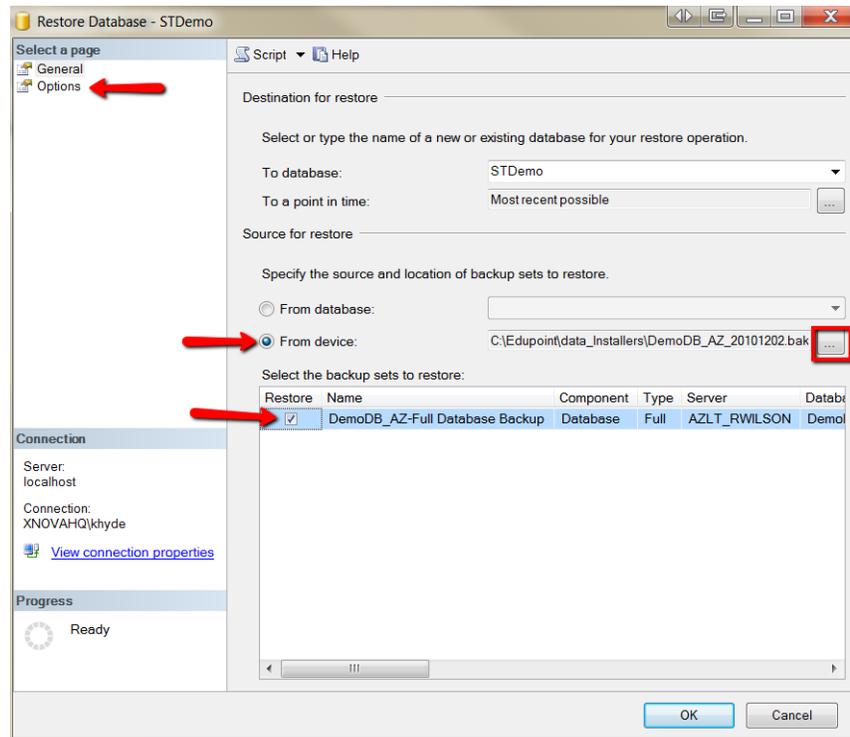


Figure 2.28 – Restore Database

11. Once the file is listed, check the **Restore** box.

12. Click on the **Options** page, and check the box to **Overwrite** the existing database.

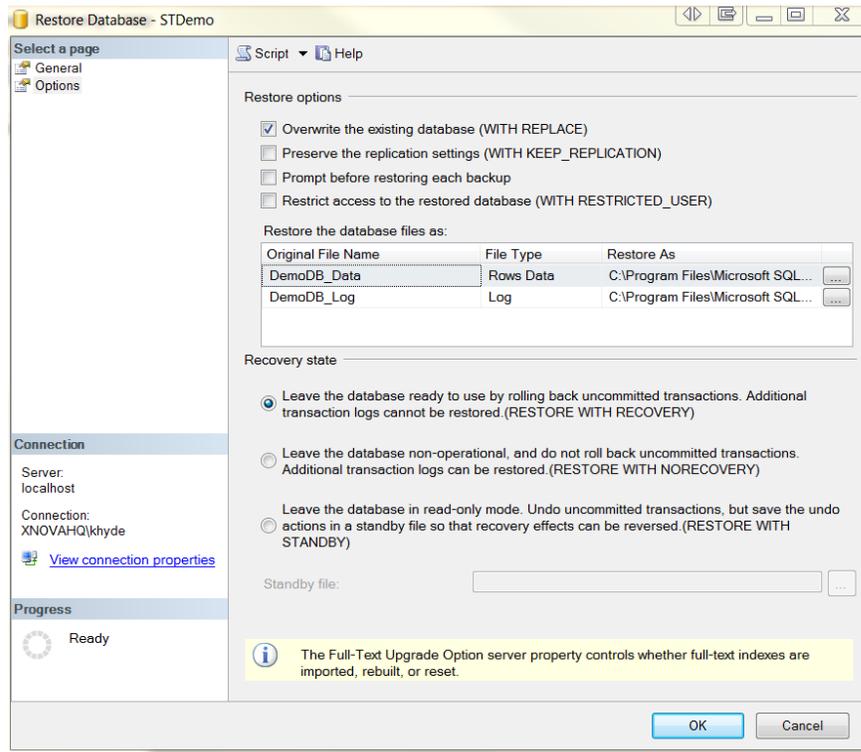


Figure 2.29 – Restore Database, Options

13. Click the **OK** button, and the data will be imported.
14. Run the RestoreRevUser SQL Query to remap the rev logon to the database. To run the query, click on **File...Open** in SQL Server Management Studio. Find the file and click on it to open.

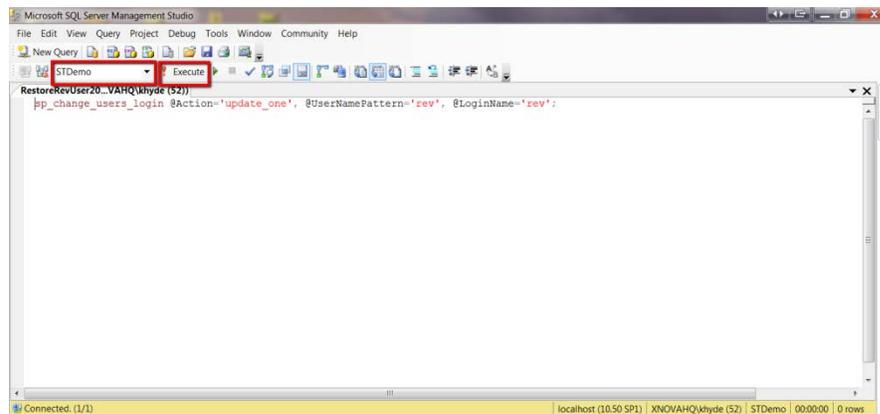


Figure 2.30 – Running the RestoreRevUser Query

15. Once the query is open, **change the database name** to STDemo from the drop-down list.
16. Click the **Execute exclamation mark** icon in the toolbar to run the query.
17. When the query has finished, close SQL Server Management Studio and the demo database should be ready for the software installation.

RECOMMENDED WORKSTATION CONFIGURATION

For districts using Internet Explorer, the following settings should be adjusted for optimal performance:

1. Disable all **extra toolbars**, such as the Google toolbar or Bing toolbar.
2. Disable **pop-up blockers** for the Synergy website.
3. In the **Security** settings, enable **File Download** and **Automatic prompting for file downloads** to allow the export of Excel files.
4. On the Advanced tab, uncheck Use HTTP 1.1 and Use HTTP 1.1 through proxy connections.

For districts planning to use the Class Board tool in Mass Scheduling, Microsoft **Silverlight** must be installed on the workstation. To install Silverlight, use the Windows Update tool.

Chapter Three: NEW INSTALLATION

In this chapter, the following topics are covered:

- ▶ How to install one or more web servers
- ▶ How to install one or more process servers
- ▶ How to setup a server for testing or training
- ▶ How to install Synergy in a 64-bit environment
- ▶ How to install other Synergy software

WEB SERVER INSTALLATION

The web server will be the front-end to the Synergy installation, and must be accessible as a web server to everyone who needs to access the Synergy software. Users will access the software via their web browser by pointing to the default site address on this server.

The web server software is installed as the Default Web Site on the server. This cannot be changed. The ST Dev software can be used to install the Synergy software to a different directory to setup development, test and training environments.

The web server software installation not only installs the software for the web server, but it also installs the database for the Synergy installation.

These instructions are for 32-bit environments. For instructions on how to install the software in a 64-bit environment, please see the section later in this chapter on 64-bit Software Installations.

To install the web server software:

1. Find the folder on the server where the Synergy release file has been extracted, as outlined in Chapter Two of this guide.
2. In the folder, find the **SynergyWebSetup** folder. Expand this folder to find and open the **Pre** sub-folder.
3. In the Pre sub-folder, double-click the **InstallUserPrompt.exe** file.

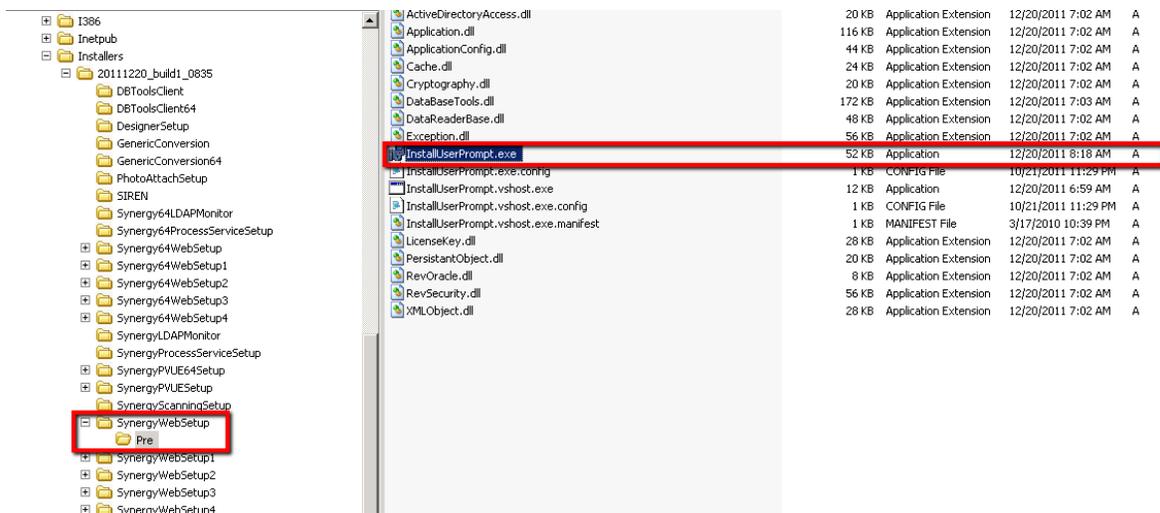


Figure 3.1 – Pre Folder, InstallUserPrompt.exe

- The software displays the Welcome dialog box. Click the **Next** button.

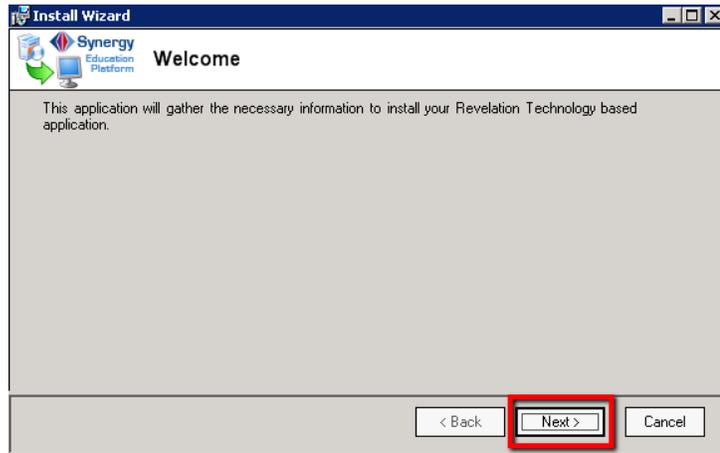


Figure 3.2 – Install Wizard Dialog Box

- The software displays the Install Wizard Step 1: License Key dialog box. Enter the **Organization Name**, **Localization** and **License Key** information received from Edupoint. This information is e-mailed to the district following the purchase of the software. Click the **Next** button to continue the installation.

The screenshot shows a window titled "Install Wizard" with the Synergy Education Platform logo. The main heading is "Install Wizard Step 1: License Key". Below the heading, there is a "Customer Information" section with the following fields:

- Organization Name: A text input field.
- District Name: A text input field.
- Localization: A dropdown menu with "USA,AZ" selected.
- License Key: Four separate text input boxes.

At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a red rectangular box.

Figure 3.3 – Install Wizard Step 1: License Key Dialog Box

- The Install Wizard Step 2: Install Type dialog box appears next. Choose **First Web Server + Database** to install Synergy for the first time. If there will be additional web servers installed to handle the user load, check the box **Server is a member of a web farm**.

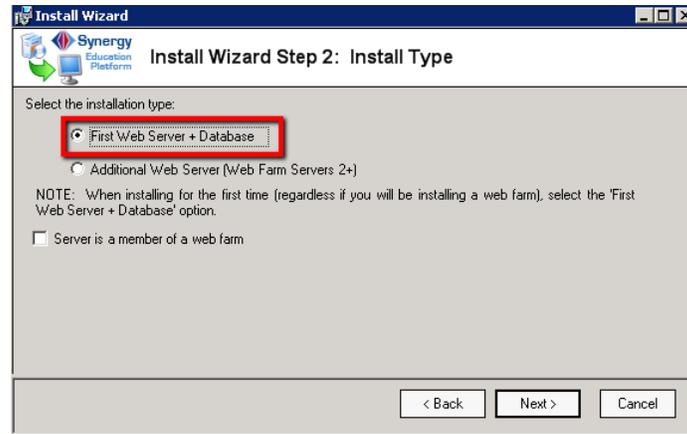


Figure 3.4- Install Wizard Step 2: Install Type Dialog Box

- If the Server is a member of a web farm box has been checked, also select the **IP address** from the drop-down list that will be used to communicate with the other web servers. If the server has multiple network cards, choose the IP address for the private LAN. Then click **Next**.

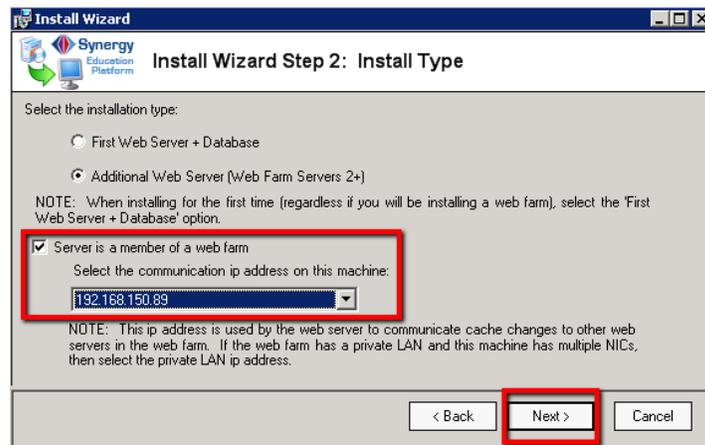


Figure 3.5 – Install Wizard Step 2: Install Type Dialog Box, IP Address

8. The software displays the Install Wizard Step 3: Database Settings dialog box. Choose the **type of database** used for the Synergy SIS installation - either the Microsoft SQL Server 2000+ database or Oracle 9i database. Then enter the values for each type of database as outlined below.

For SQL Server 2000+

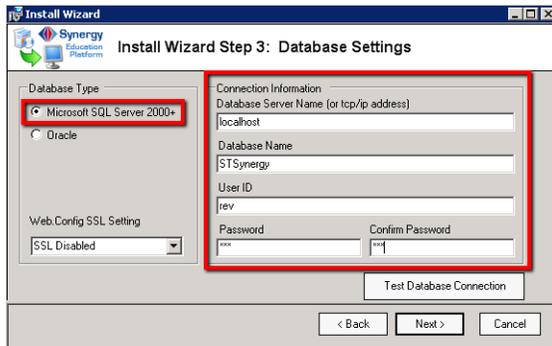


Figure 3.6 – Install Wizard Step 3: Database Settings Dialog Box, SQL

For Oracle 9i

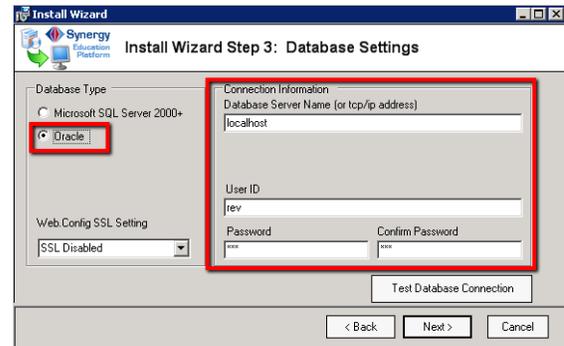


Figure 3.7 – Install Wizard Step 3: Database Settings Dialog Box, Oracle

- Enter the **server name** or TCP/IP address in the Database Server Name field.
 - Enter the **Database Name** in Database Name field.
 - Enter **rev** in the **User ID** field, the **Password** and **Confirm Password** fields.
9. Click the **Test Database Connection** button. The software displays the Connection Succeeded dialog box if the settings are entered correctly. Click **OK** to continue, and then click the **Next** button on the Install Wizard dialog box.



Figure 3.8 – Connection Succeeded Dialog Box.

10. The software displays the Finish dialog box. Click the **Finish** button.

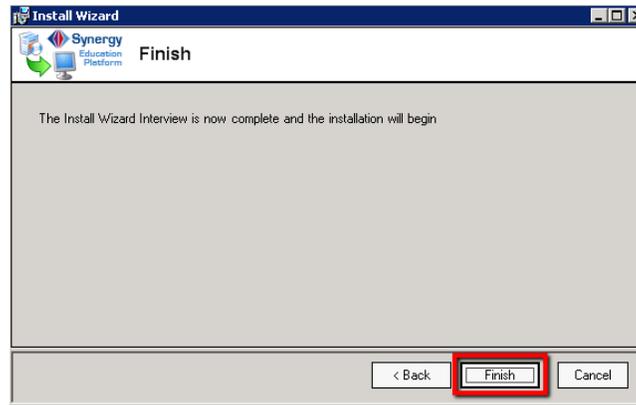


Figure 3.9 – Finish Dialog Box

11. The following web site warning dialog box may appear if other websites are setup by default on the web server. To overwrite the existing website on port 80, click **OK**. Otherwise, cancel the installation and move the existing website on port 80 to a different port or remove it from the server, and then restart the installation.



Figure 3.10 – Web Site Warning Dialog Box

12. The software displays the Welcome to the ST Setup Wizard dialog box. Click the **Next** button.

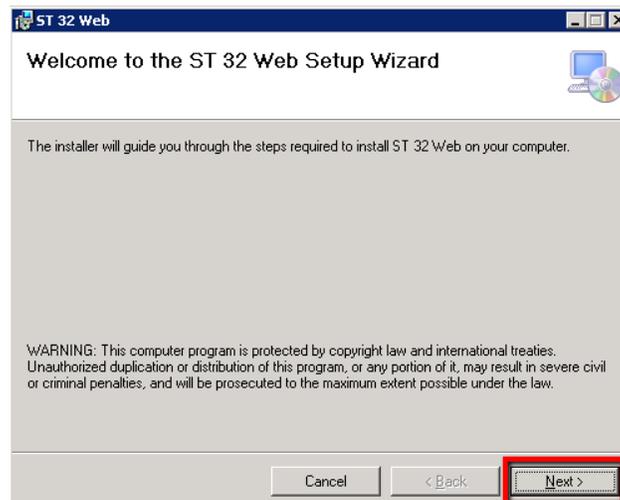


Figure 3.11 - Welcome to the ST 32 Web Setup Wizard dialog box

13. The software displays the Confirm Installation dialog box. Click the **Next** button.

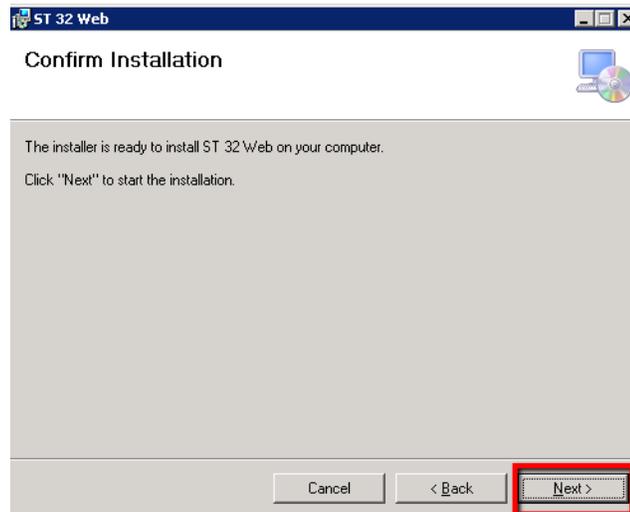


Figure 3.12 - Confirm Installation dialog box

14. The software displays the Installing ST dialog box as the web server software is installed. A progress bar will indicate the progression of the installation.

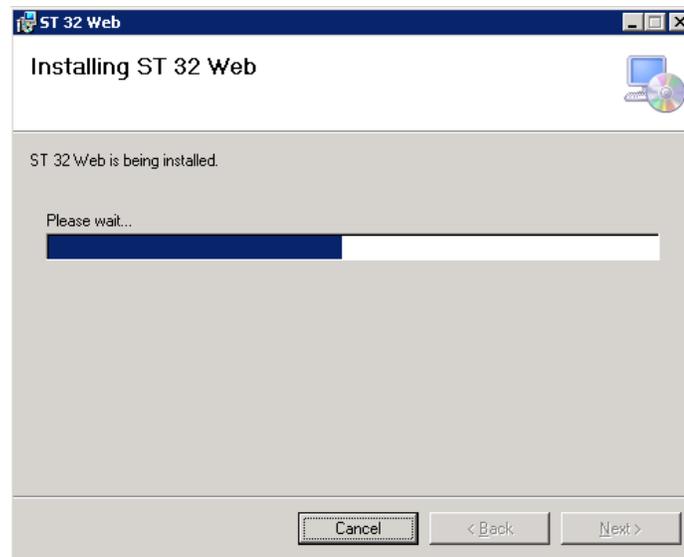


Figure 3.13 - Installing ST dialog box

15. During this process, the software also displays the Updating Database dialog box as the database is installed. A progress bar will indicate the progression of the database installation.

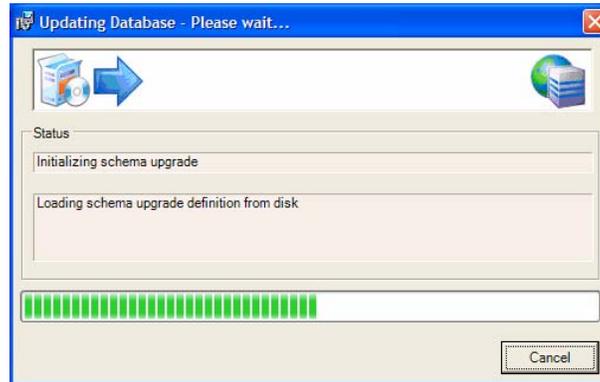


Figure 3.14 - Updating Database dialog box

16. Please wait for both of these processes to complete. Once complete, the software displays the Installation Complete dialog box. Click the **Close** button.

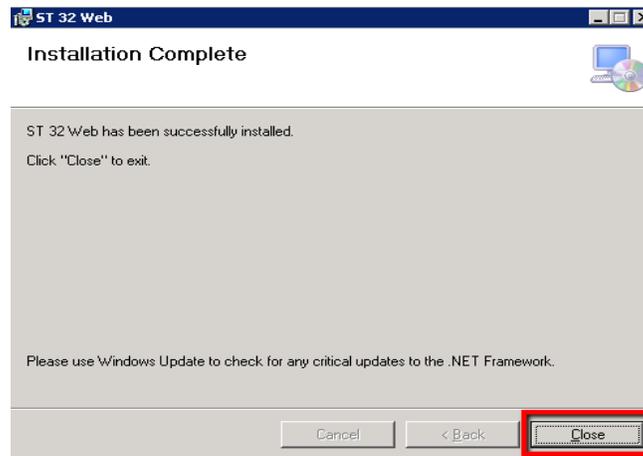


Figure 3.15 - Installation Complete dialog box

The web server software and the database are now installed! Additional web servers may now be installed. The process server should also be installed, as well as any other Synergy software as outlined in the sections later in this chapter.



Note: All Synergy modules must be uninstalled and reinstalled with each new release, as the core software that each module uses is updated each time. However, the settings entered during installation are saved so the information will not need to be re-entered during a re-install (for example, the license key is saved). For instructions on upgrading to a new release, please see Chapter Four.

To install additional web servers in a server web farm:

1. Find the folder on the server where the Synergy release file has been extracted, as outlined in Chapter Two of this guide.
2. In the folder, find the **SynergyWebSetup** folder. Expand this folder to find and open the **Pre** sub-folder.
3. In the Pre sub-folder, double-click the **InstallUserPrompt.exe** file.

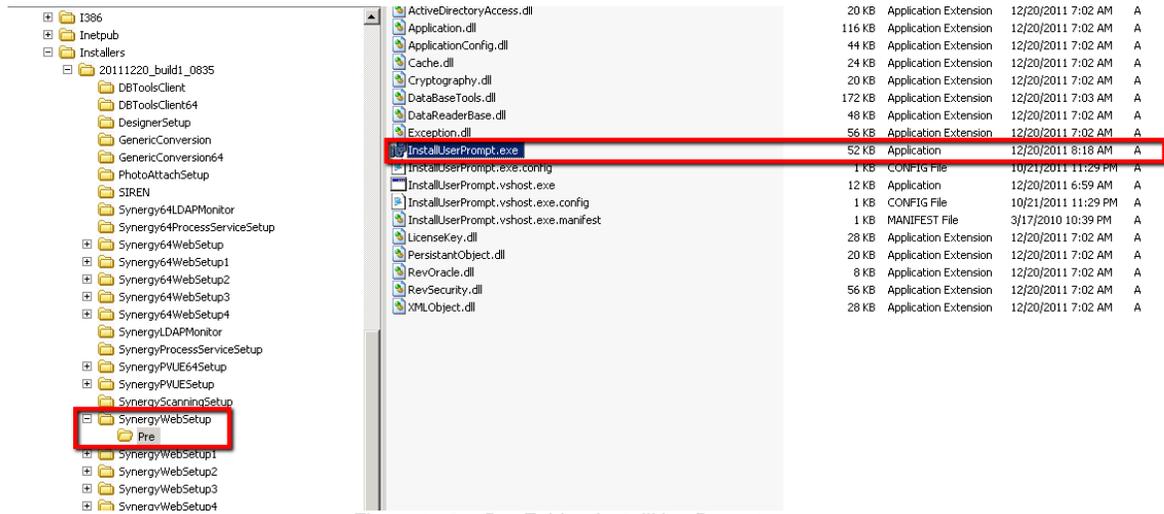


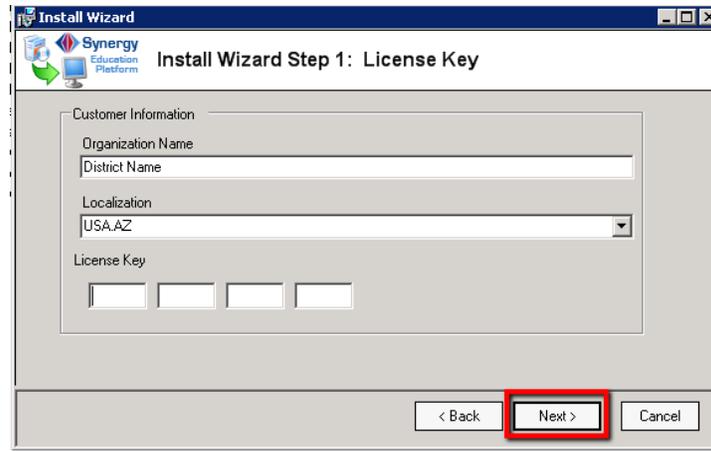
Figure 3.16 – Pre Folder, InstallUserPrompt.exe

4. The software displays the Welcome dialog box. Click the **Next** button.



Figure 3.17 – Install Wizard Dialog Box

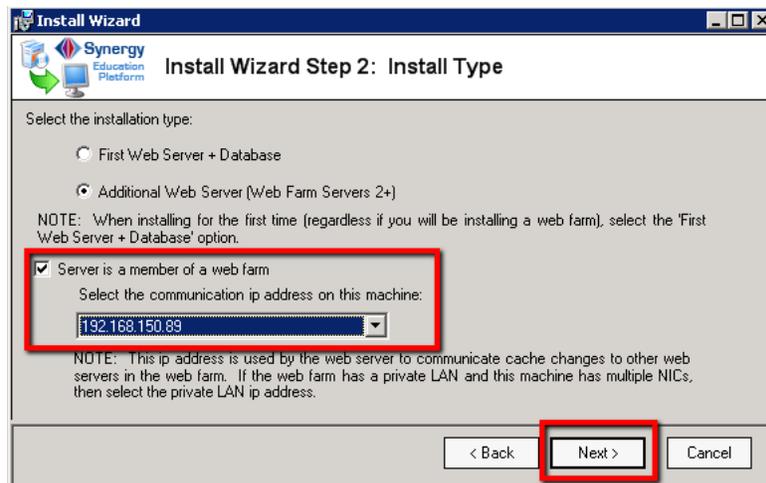
- The software displays the Install Wizard Step 1: License Key dialog box. Enter the **Organization Name**, **Localization** and **License Key** information received from Edupoint. This information is e-mailed to the district following the purchase of the software. Click the **Next** button to continue the installation.



The screenshot shows the 'Install Wizard Step 1: License Key' dialog box. It features a title bar with the Synergy Education Platform logo. The main area is titled 'Customer Information' and contains four input fields: 'Organization Name', 'District Name', 'Localization' (a dropdown menu currently showing 'USA.AZ'), and 'License Key' (four separate character input boxes). At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a red rectangular box.

Figure 3.18 – Install Wizard Step 1: License Key Dialog Box

- The Install Wizard Step 2: Install Type dialog box appears next. Choose **Additional Web Server (Web Farm Servers 2+)** to install Synergy on another web server. Check the box **Server is a member of a web farm**, and select the **IP address** from the drop-down list that will be used to communicate with the other web servers. If the server has multiple network cards, choose the IP address for the private LAN. Then click **Next**.



The screenshot shows the 'Install Wizard Step 2: Install Type' dialog box. It features a title bar with the Synergy Education Platform logo. The main area is titled 'Select the installation type:' and contains two radio button options: 'First Web Server + Database' and 'Additional Web Server (Web Farm Servers 2+)'. Below these is a note: 'NOTE: When installing for the first time (regardless if you will be installing a web farm), select the 'First Web Server + Database' option.' The 'Additional Web Server' option is selected. Below this is a checked checkbox labeled 'Server is a member of a web farm' and a dropdown menu labeled 'Select the communication ip address on this machine:' with the value '192.168.150.89'. Another note follows: 'NOTE: This ip address is used by the web server to communicate cache changes to other web servers in the web farm. If the web farm has a private LAN and this machine has multiple NICs, then select the private LAN ip address.' At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a red rectangular box.

Figure 3.19- Install Wizard Step 2: Install Type Dialog Box

- The software displays the Install Wizard Step 3: Database Settings dialog box. Choose the **type of database** used for the Synergy installation - either the Microsoft SQL Server 2000+ database or Oracle 9i database. Then enter the values for each type of database as outlined below.

For SQL Server 2000+

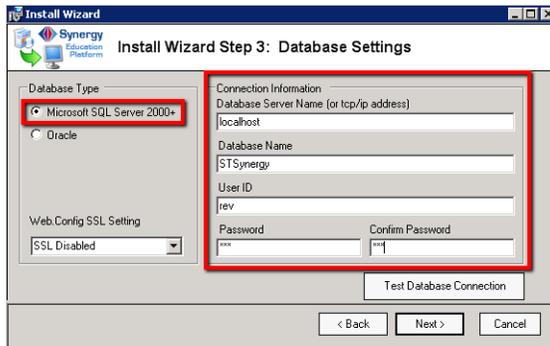


Figure 3.20 – Install Wizard Step 3: Database Settings Dialog Box, SQL

For Oracle 9i

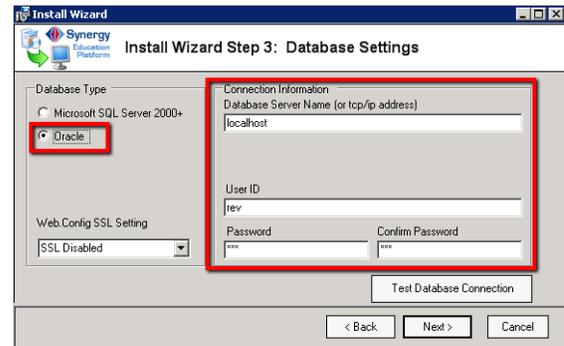


Figure 3.21 – Install Wizard Step 3: Database Settings Dialog Box, Oracle

- Enter the **server name** or TCP/IP address in the Database Server Name field.
 - Enter the **Database Name** in Database Name field.
 - Enter **rev** in the **User ID** field, the **Password** and **Confirm Password** fields.
- Click the **Test Database Connection** button. The software displays the Connection Succeeded dialog box if the settings are entered correctly. Click **OK** to continue, and then click the **Next** button on the Install Wizard dialog box.



Figure 3.22 – Connection Succeeded Dialog Box.

9. The software displays the Finish dialog box. Click the **Finish** button.

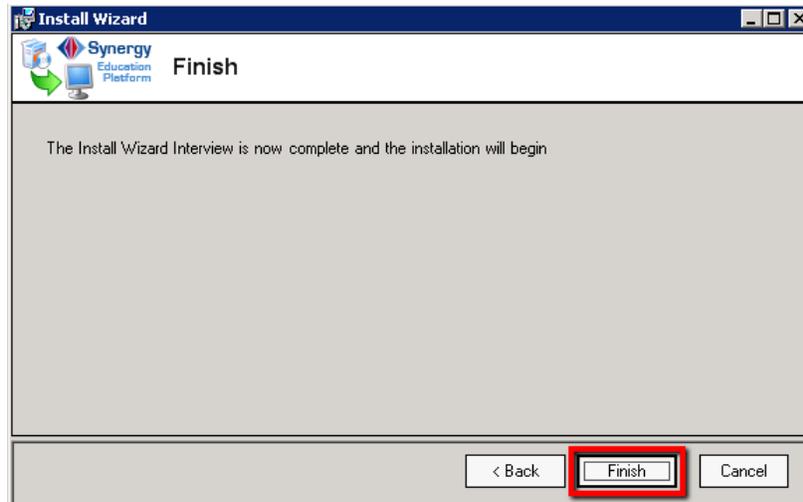


Figure 3.23 – Finish Dialog Box

10. The following web site warning dialog box may appear if other websites are setup by default on the web server. To overwrite the existing website on port 80, click **OK**. Otherwise, cancel the installation and move the existing website on port 80 to a different port or remove it from the server, and then restart the installation.

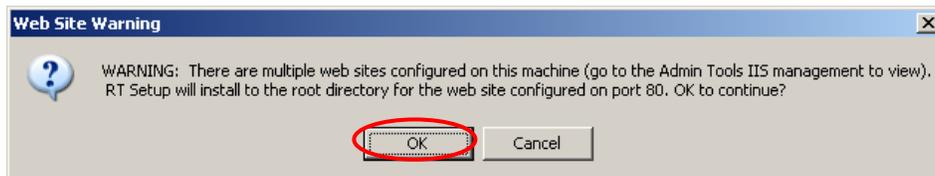


Figure 3.24 – Web Site Warning Dialog Box

11. The software displays the Welcome to the ST 32 Web 1 Setup Wizard dialog box. Click the **Next** button.

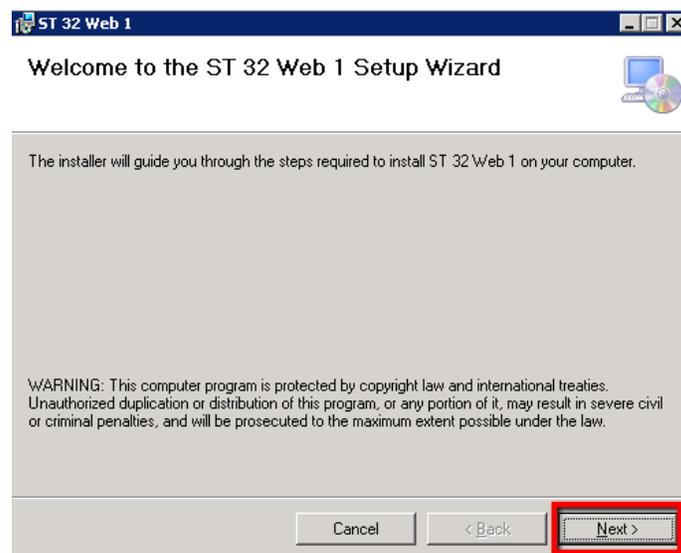


Figure 3.25 - Welcome to the ST 32 Web 1 Setup Wizard dialog box

12. The software displays the Confirm Installation dialog box. Click the **Next** button.

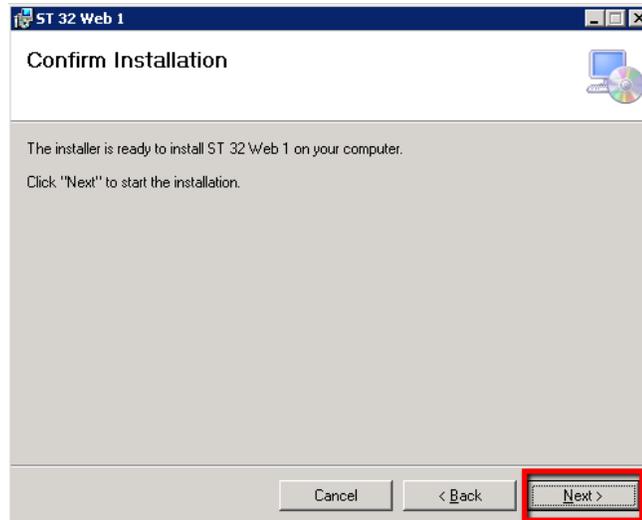


Figure 3.26 – Confirm Installation dialog box

13. The software displays the Installing ST dialog box as the web server software is installed. A progress bar will indicate the progression of the installation.

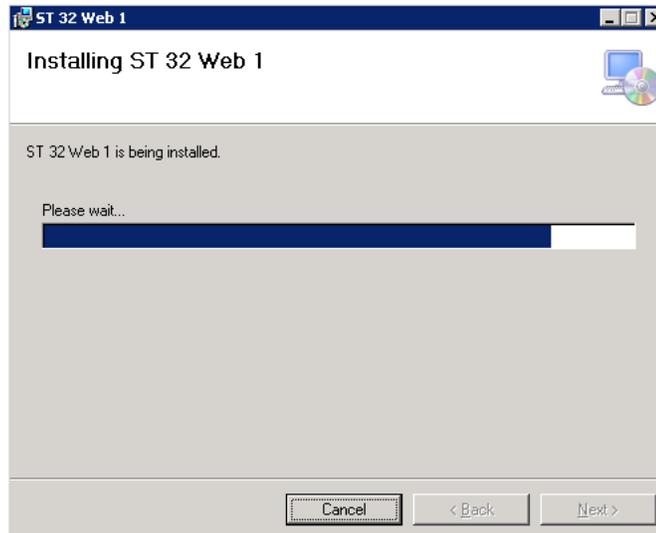


Figure 3.28 - Installing ST 32 Web 1 dialog box

14. Please wait for this process to complete. Once complete, the software displays the Installation Complete dialog box. Click the **Close** button.

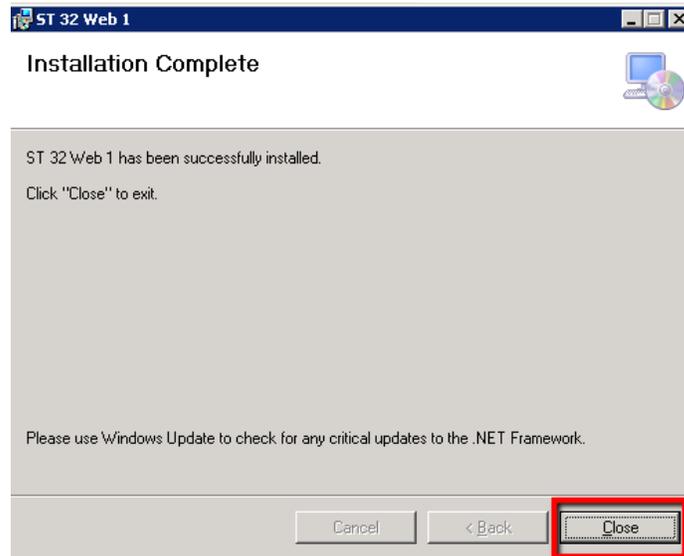


Figure 3.29 - Installation Complete dialog box

The additional web server is now installed! Repeat steps 1 through 14 to install each additional web server.



Tip: To make the website easier to locate by staff, the district may want to create an alias for the location of the Synergy website in their DNS settings.

PROCESS SERVER INSTALLATION

The process server handles report processing and other intensive processing tasks to improve the performance of the web front-end servers. Follow the steps below to install each process server in use at the district. Process servers can be dedicated to an organization like a school or group of schools, or to certain types of processing tasks. To install a process server:

1. Find the folder on the server where the Synergy SIS release file has been extracted, as outlined in Chapter Two of this guide
2. In the latest release folder, find the **SynergyProcessServiceSetup** folder and double-click on the **Setup.exe** file.

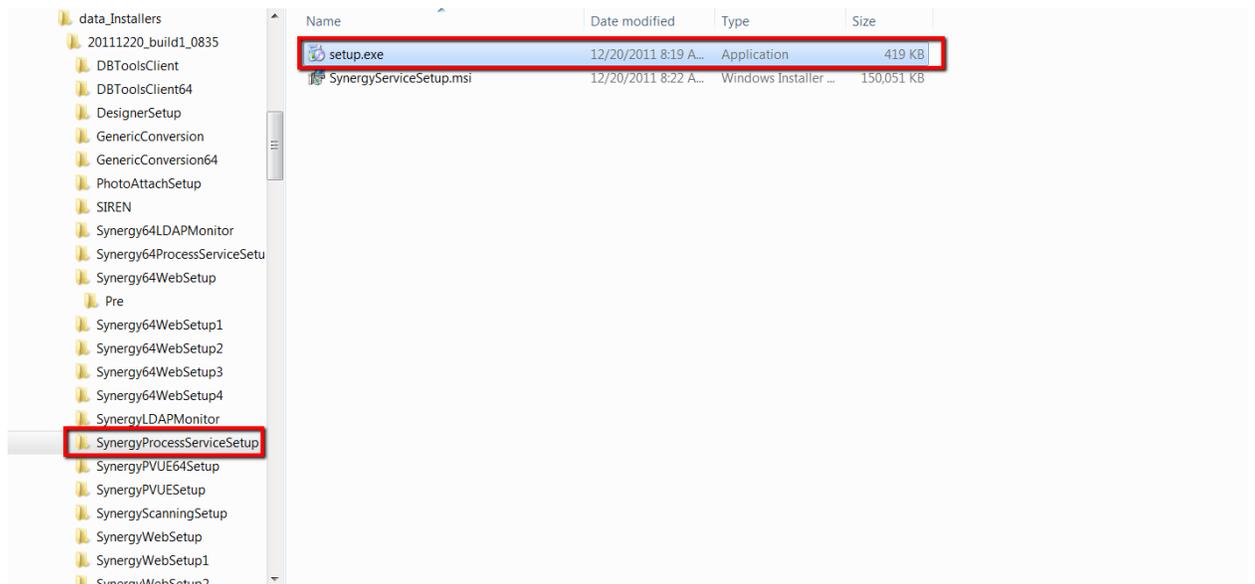


Figure 3.30 – SynergyProcessServiceSetup Folder

3. If Microsoft Visual C++ 2010 x86 Redistributable has already been installed, continue to the next step. If it has not yet been installed, the software displays a dialog to install Visual C++ 2010 Runtime Libraries (x86). Follow the prompts to download and install the software.



Figure 3.31 - Install Visual C++ 2010 Runtime Libraries (x86) dialog box

- The software displays the Welcome to the ST Process Service Setup Wizard dialog box. Click the **Next** button to continue.

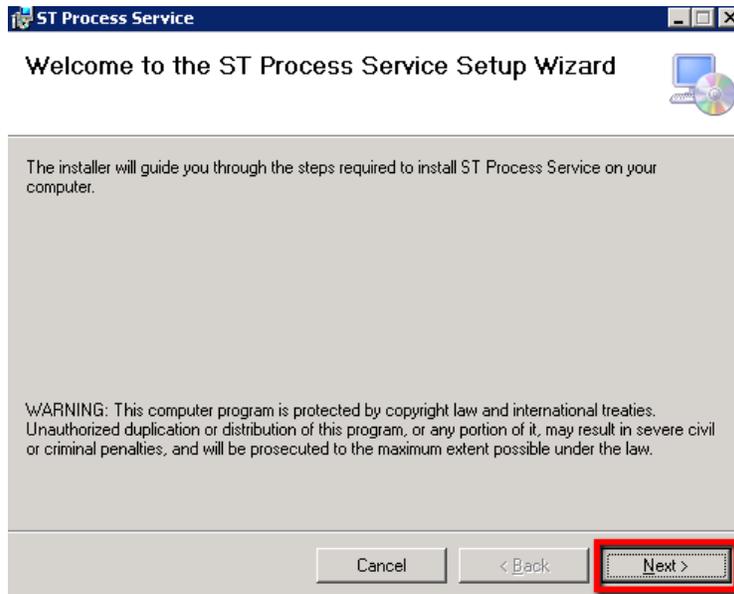


Figure 3.31 - Welcome to the ST Process Service Setup Wizard dialog box

- The software displays the Select Installation Folder dialog box. To change the default installation location (which is C:\Program Files\Edupoint\RT Process Service, either type the new location in the Folder box or click the **Browse** button to locate the new folder. To see what space the software will take on the drive, click the **Disk Cost** button.

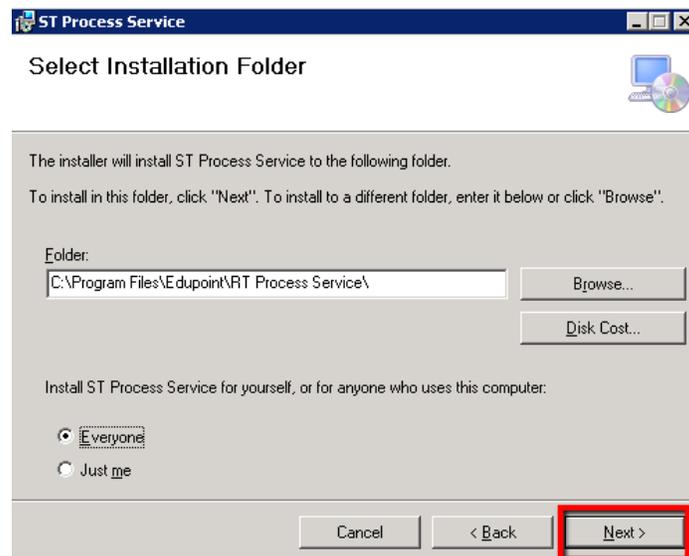


Figure 3.32 - Select Installation Folder dialog box

6. Select the **Everyone** radio button to make the process server available for all server logons, or click Just me to install only for the currently logged in user. Click the **Next** button to continue.
7. The software displays the Confirm Installation dialog box. Click the **Next** button to start the installation.

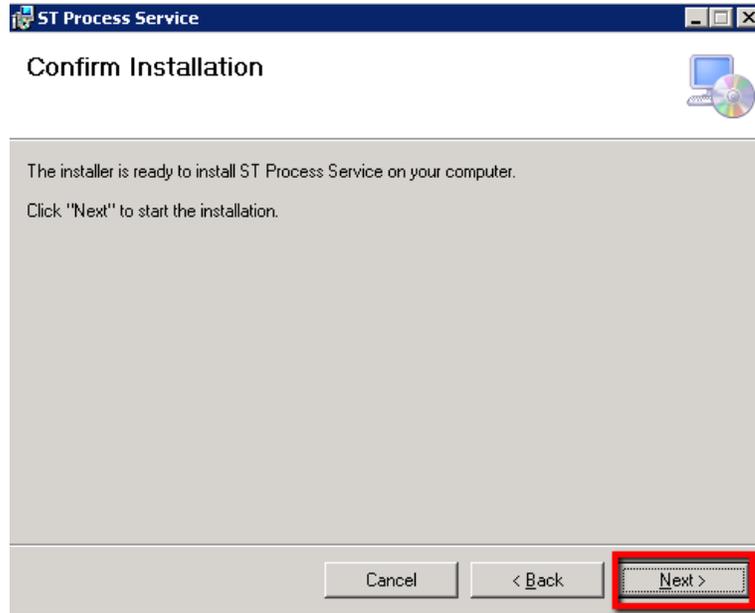


Figure 3.263 - Confirm Installation dialog box

8. The Installing RT Process Service dialog box is displayed, with a progress bar to show the progress of the installation.

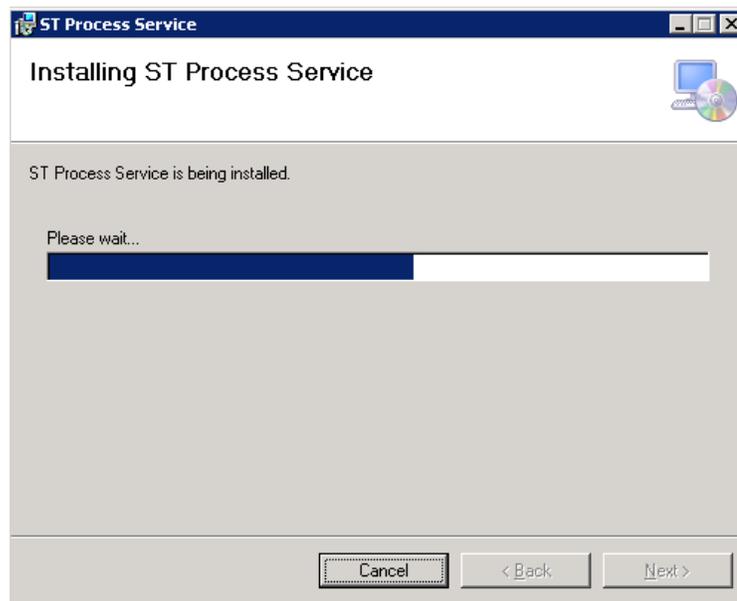


Figure 3.34 - Installing ST Process Service dialog box

9. When the installation is complete, the Installation Complete dialog box is displayed. Click the **Close** button to finish the installation.

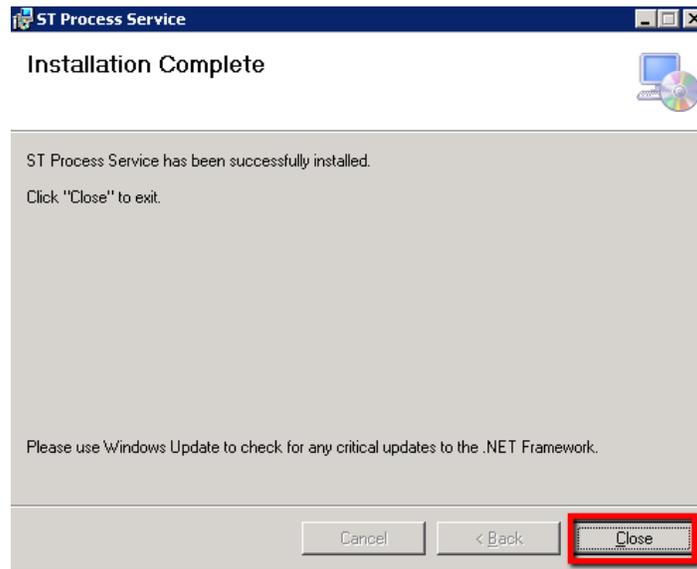


Figure 3.35 - Installation Complete dialog box

The process server is now installed.

TEST/TRAINING SERVER INSTALLATION

In addition to installing a production version of Synergy, additional copies of Synergy may be installed to create a testing platform or to be used for training. These installations contain the exact same software as the production version, but they can be installed to a different location so as not to overwrite the Default Web Site. To install a test version of the software:

1. Find the folder on the server where the Synergy release file has been extracted, as outlined in Chapter Two of this guide.
2. In the folder, find the **SynergyWebSetup1** folder. Expand this folder to find and open the **Pre** sub-folder.
3. In the Pre sub-folder, double-click the **InstallUserPrompt.exe** file.

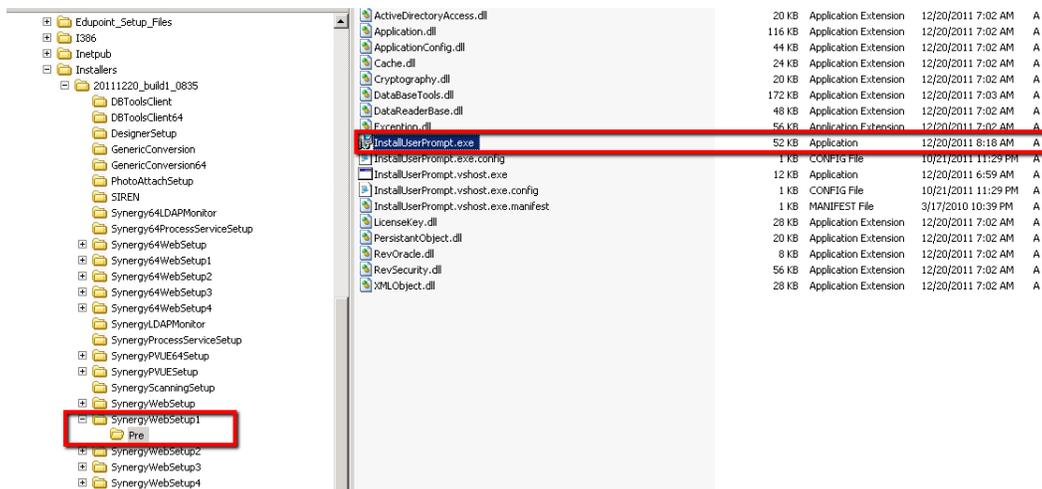


Figure 3.36 – Synergy64WebSetup1 Folder

4. The software displays the Welcome dialog box. Click the **Next** button.

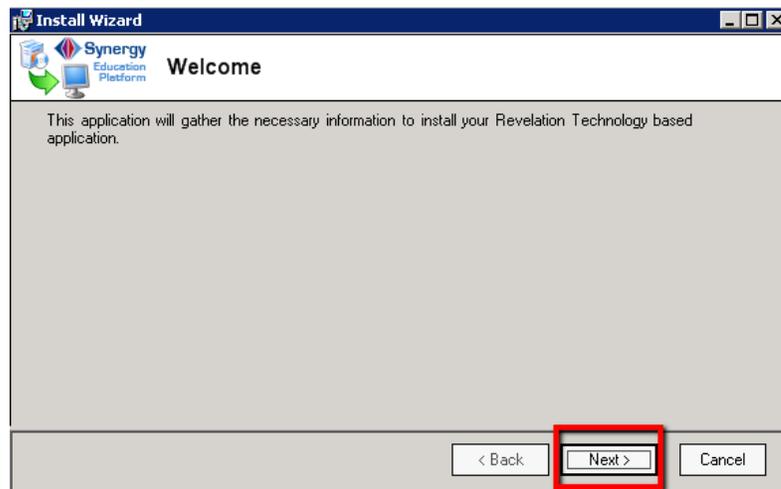


Figure 3.37 – Install Wizard Dialog Box

5. The software displays the Install Wizard Step 1: License Key dialog box. Confirm the license key information, and click the **Next** button to continue the installation.

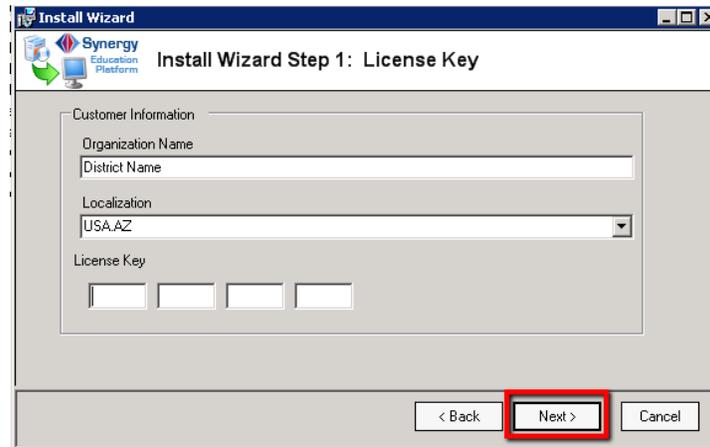


Figure 3.38 – Install Wizard Step 1: License Key Dialog Box

6. The Install Wizard Step 2: Install Type dialog box appears next. Choose **First Web Server + Database** to install the development server, and then click **Next**.

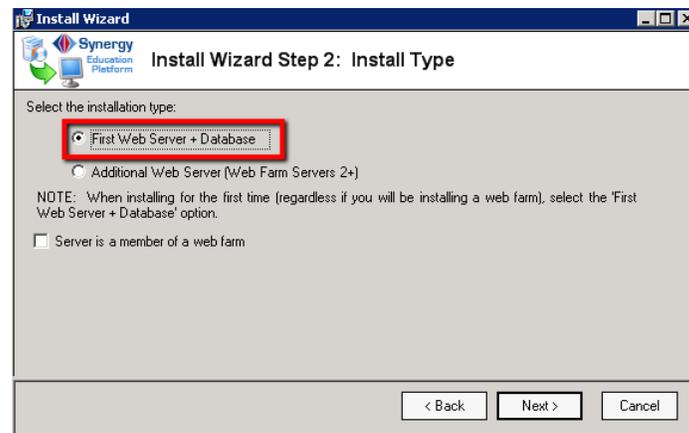


Figure 3.27- Install Wizard Step 2: Install Type Dialog Box

- The software displays the Install Wizard Step 3: Database Settings dialog box. Choose the **type of database** used for the Synergy SIS installation - either the Microsoft SQL Server 2000+ database or Oracle 9i database. Then enter the values for each type of database as outlined below.

For SQL Server 2000+

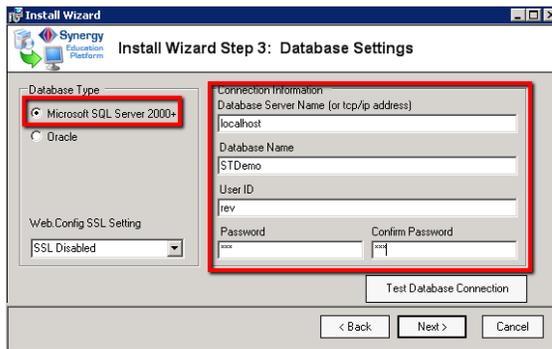


Figure 3.28 – Install Wizard Step 3: Database Settings Dialog Box, SQL

For Oracle 9i

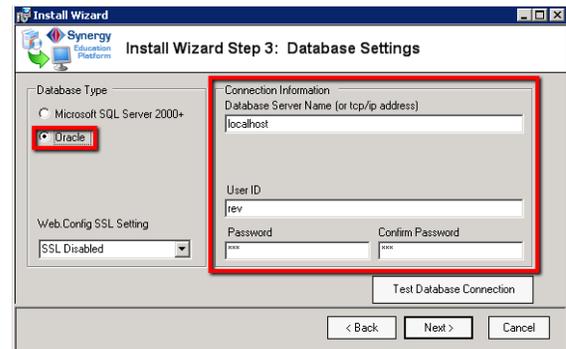


Figure 3.29 – Install Wizard Step 3: Database Settings Dialog Box, Oracle

- Enter the **server name** or TCP/IP address in the Database Server Name field.
- Enter the **Database Name** in Database Name field.
- Enter **rev** in the **User ID** field, the **Password** and **Confirm Password** fields.



Caution: Be sure to enter the name of a different database such as ST_Demo or ST_Test so that this installation does not modify the main production database.

- Click the **Test Database Connection** button. The software displays the Connection Succeeded dialog box if the settings are entered correctly. Click **OK** to continue, and then click the **Next** button on the Install Wizard dialog box.

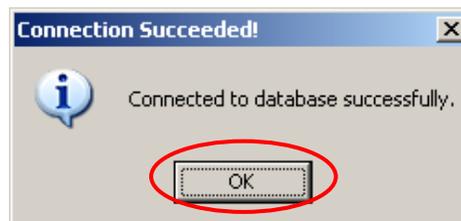


Figure 3.30 – Connection Succeeded Dialog Box.

9. The software displays the Finish dialog box. Click the **Finish** button.

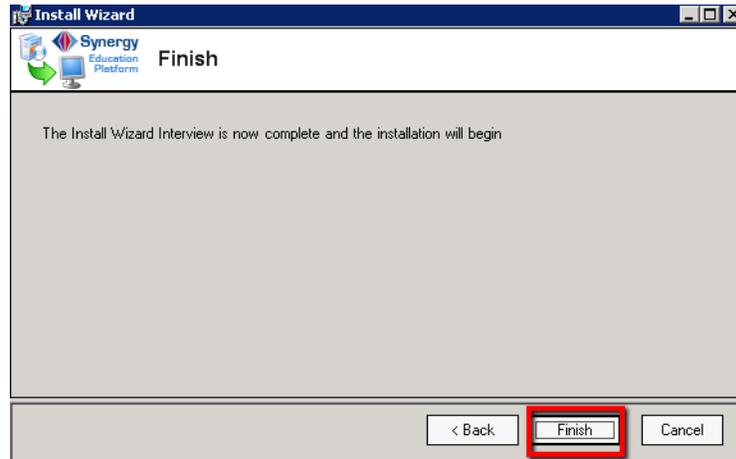


Figure 3.31 – Finish Dialog Box

10. The following web site warning dialog box may appear if other websites are setup by default on the web server. To overwrite the existing website on port 80, click **OK**. Otherwise, cancel the installation and move the existing website on port 80 to a different port or remove it from the server, and then restart the installation.

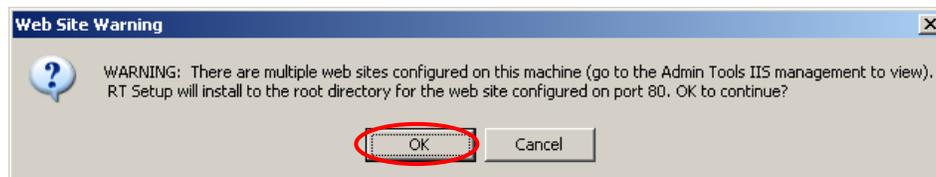


Figure 3.32 – Web Site Warning Dialog Box

11. The software displays the Welcome to the RT_Developer Setup Wizard dialog box. Click the **Next** button.

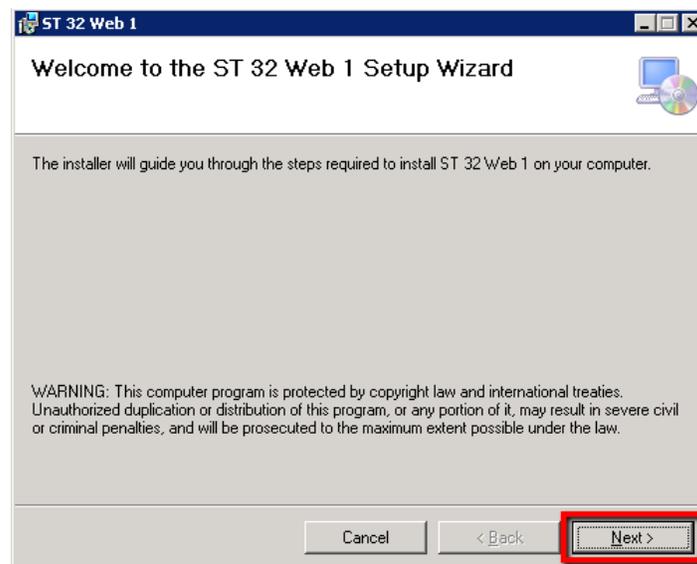


Figure 3.33 - Welcome to the ST 32 Web 1 Setup Wizard dialog box

- The software displays the Select Installation Address dialog box. Enter the name of the **Virtual directory** (underneath the root web server directory) where the software should be installed. To check the disk space available, click the **Disk Cost** button. To select a different Application Pool, select the new Application Pool from the dropdown. After all the settings have been configured, click the **Next** button.

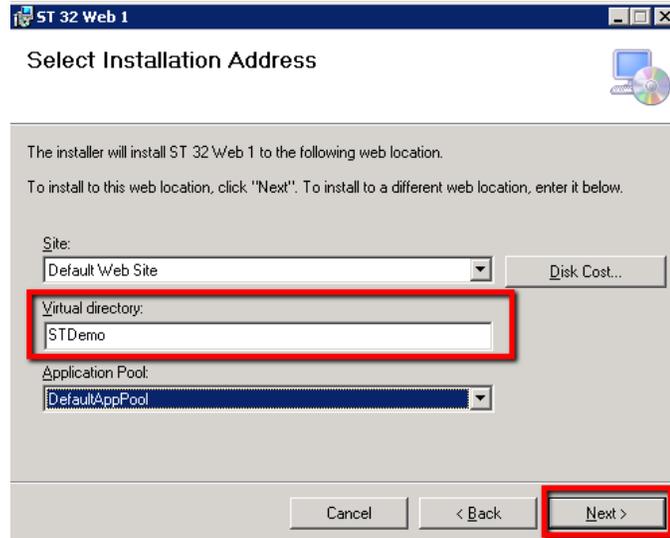


Figure 3.34 - Select Installation Address dialog box



Note – Edupoint recommends using separate Application Pools for each webserver (Production, Training, Test, and Demo.) This enables better control and troubleshooting of web server issues.

In addition, we recommend setting up the Application Pools to recycle at a specific time instead of after a number of cycles. This prevents the Application Pool from resetting during school hours.

13. The software displays the Confirm Installation dialog box. Click the **Next** button.

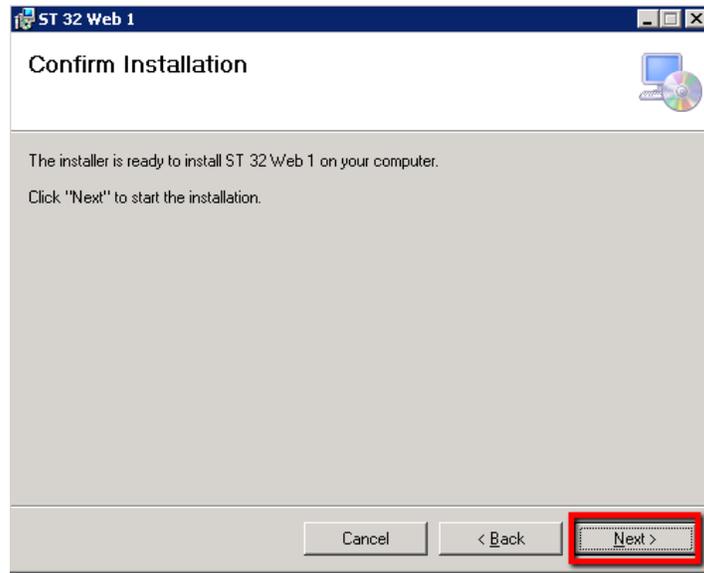


Figure 3.35 - Confirm Installation dialog box

14. The software displays the Installing ST 32 Web 1 dialog box as the web server software is installed. A progress bar will indicate the progression of the installation.

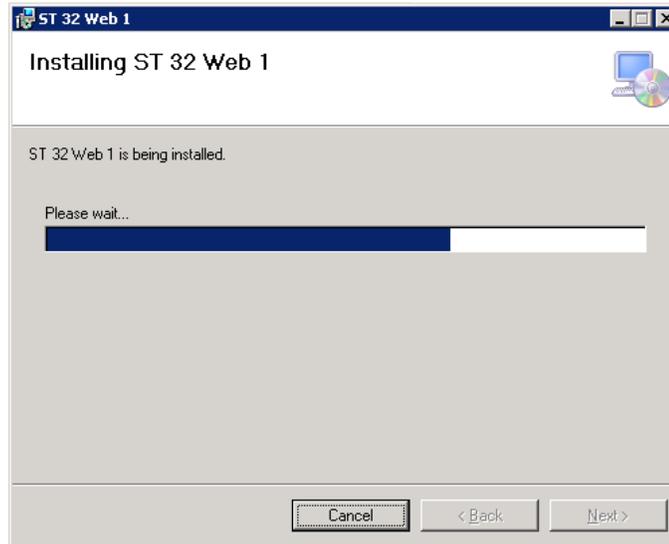


Figure 3.36 - Installing ST 32 Web 1 dialog box

15. During this process, the software also displays the Updating Database dialog box as the database is installed. A progress bar will indicate the progression of the database installation.



Figure 3.37 - Updating Database dialog box

16. Please wait for both of these processes to complete. Once complete, the software displays the Installation Complete dialog box. Click the **Close** button.

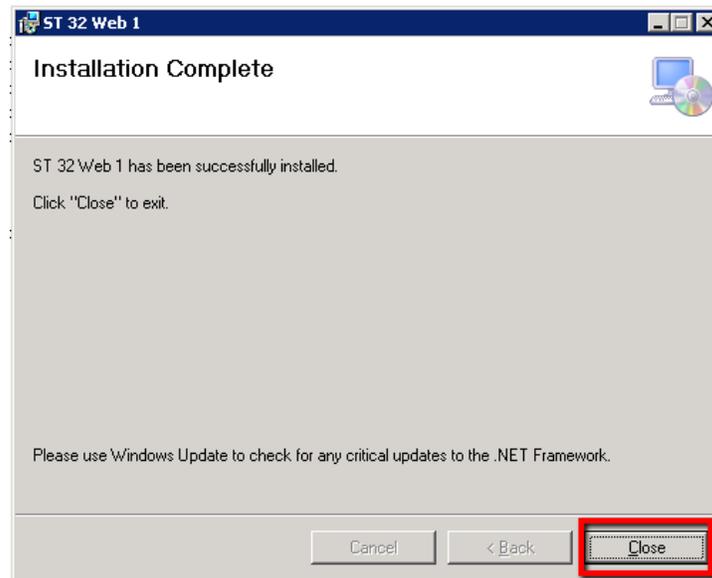


Figure 3.38 - Installation Complete dialog box

The test or training server installation is now complete! To install another instance of the Synergy software for testing or training, there are 3 other folders that can be used to install another instance of the software: SynergyWebSetup2, SynergyWebSetup3 and SynergyWebSetup4. This allows for up to 5 instances of Synergy to be installed on one server – 1 production copy (SynergyWebSetup) and 4 development copies (SynergyWebSetup1-4).

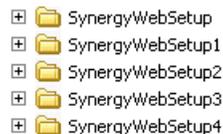


Figure 3.39 – STWebSetup Folders

64-BIT SOFTWARE INSTALLATION

If installing Synergy SIS on a 64-bit operating system, the 64-bit version of Synergy SIS must be installed. To install the 64-bit version of the web server software:

1. When downloading the ZIP file with the latest release as outlined in the section Obtaining the Latest Release in Chapter Two of this guide, be sure to download the ZIP file titled RT64 instead of RT.
2. Extract the ZIP file to the folder on the server used for Synergy SIS software installation, as outlined in Chapter Two of this guide.
3. In the folder, find the **RT64Setup** folder. Expand this folder to find and open the **Pre** sub-folder.

4. In the Pre sub-folder, double-click the **InstallUserPrompt.exe** file.

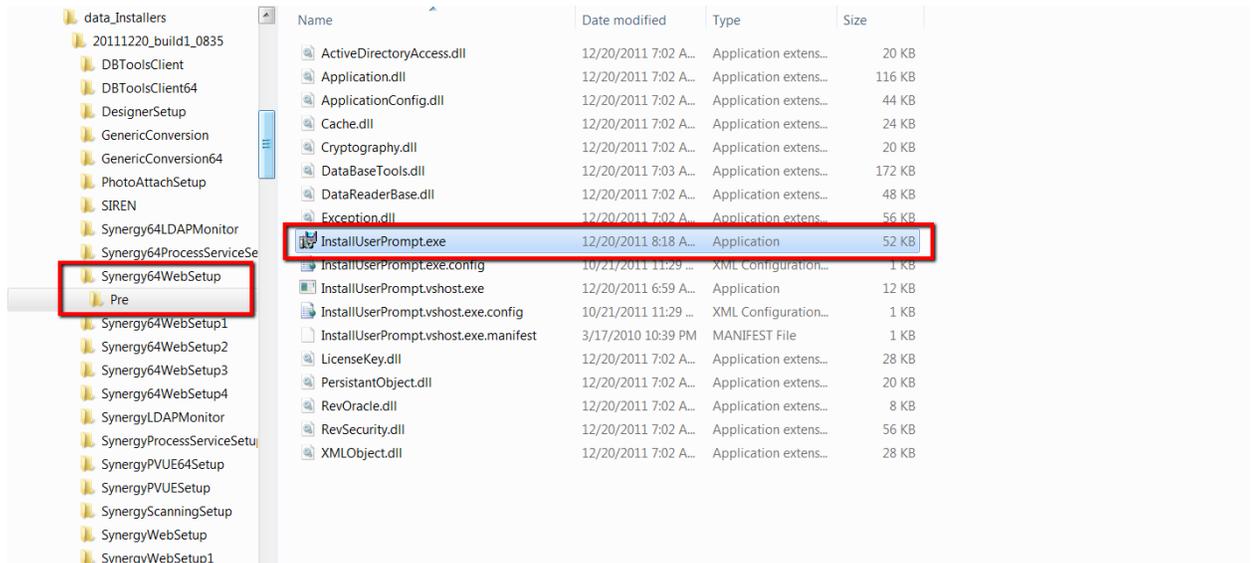


Figure 3.40 – Pre Folder, InstallUserPrompt.exe

5. The software displays the Welcome dialog box. Click the **Next** button.

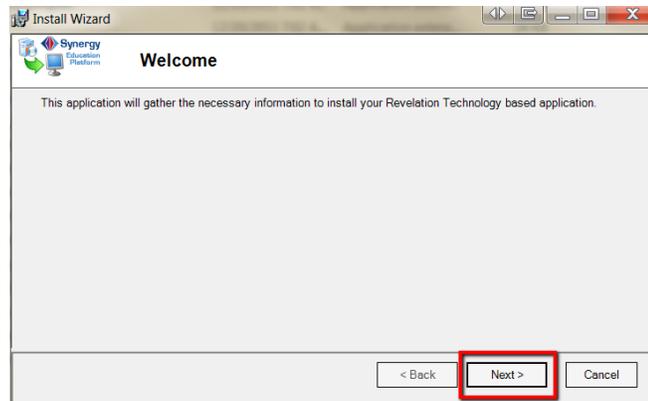


Figure 3.41 – Install Wizard Dialog Box

- The software displays the Install Wizard Step 1: License Key dialog box. Enter the **Organization Name**, **Localization** and **License Key** information received from Edupoint. This information is e-mailed to the district following the purchase of the software. Click the **Next** button to continue the installation.



Figure 3.42 – Install Wizard Step 1: License Key Dialog Box

- The Install Wizard Step 2: Install Type dialog box appears next. Choose **First Web Server + Database** to install Synergy SIS for the first time. If there will be additional web servers installed to handle the user load, check the box **Server is a member of a web farm**.

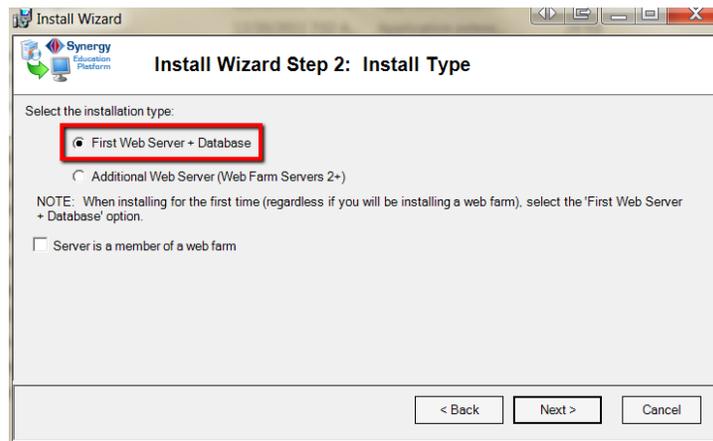


Figure 3.43- Install Wizard Step 2: Install Type Dialog Box

- If the Server is a member of a web farm box has been checked, also select the **IP address** from the drop-down list that will be used to communicate with the other web servers. If the server has multiple network cards, choose the IP address for the private LAN. Then click **Next**.

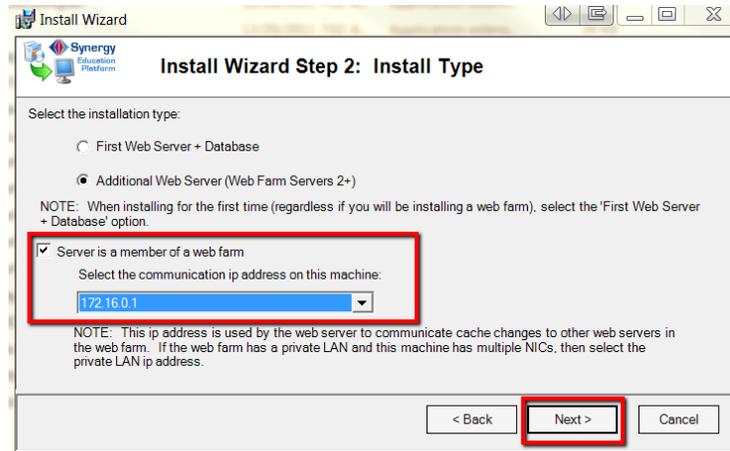


Figure 3.44 – Install Wizard Step 2: Install Type Dialog Box, IP Address

- The software displays the Install Wizard Step 3: Database Settings dialog box. Choose the **type of database** used for the Synergy SIS installation - either the Microsoft SQL Server 2000+ database or Oracle 9i database. Then enter the values for each type of database as outlined below.

For SQL Server 2000+

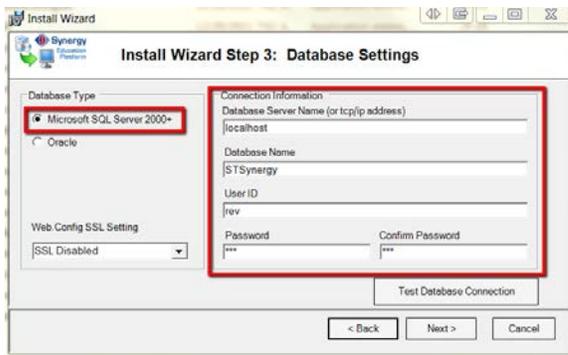


Figure 3.45 – Install Wizard Step 3: Database Settings Dialog Box, SQL

- Enter the **server name** or TCP/IP address in the Database Server Name field.
- Enter the **Database Name** in Database Name field.
- Enter **rev** in the **User ID** field, the **Password** and **Confirm Password** fields.

For Oracle 9i

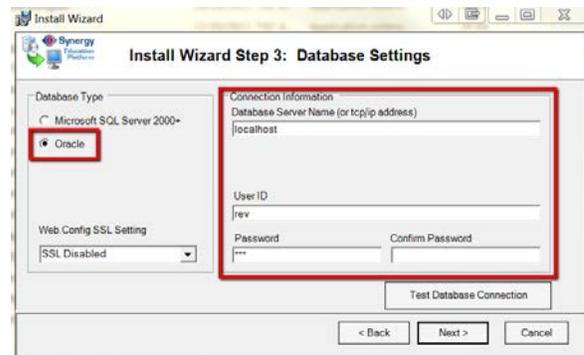


Figure 3.46 – Install Wizard Step 3: Database Settings Dialog Box, Oracle

- Enter the **server name** or TCP/IP address in the Database Server Name field.
- Enter **rev** in the **User ID** field, the **Password** and **Confirm Password** fields.

- Click the **Test Database Connection** button. The software displays the Connection Succeeded dialog box if the settings are entered correctly. Click **OK** to continue, and then click the **Next** button on the Install Wizard dialog box.



Figure 3.47 – Connection Succeeded Dialog Box.

- The software displays the Finish dialog box. Click the **Finish** button.

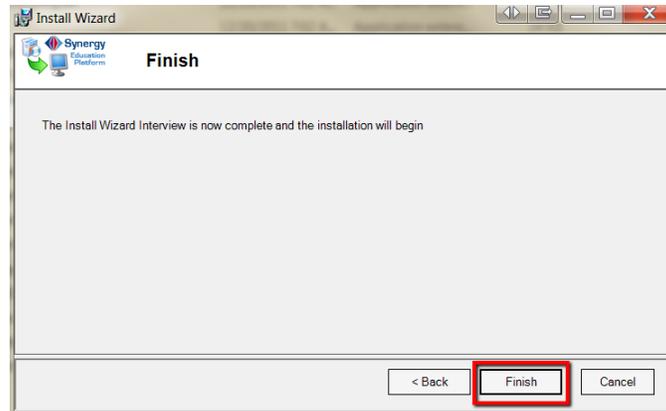


Figure 3.48 – Finish Dialog Box

- The following web site warning dialog box may appear if other websites are setup by default on the web server. To overwrite the existing website on port 80, click **OK**. Otherwise, cancel the installation and move the existing website on port 80 to a different port or remove it from the server, and then restart the installation.

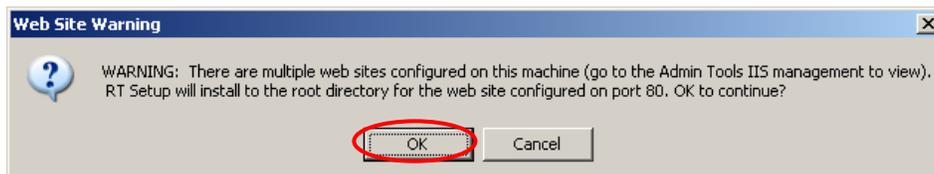


Figure 3.49 – Web Site Warning Dialog Box

13. The software displays the Welcome to the ST Setup Wizard dialog box. Click the **Next** button.

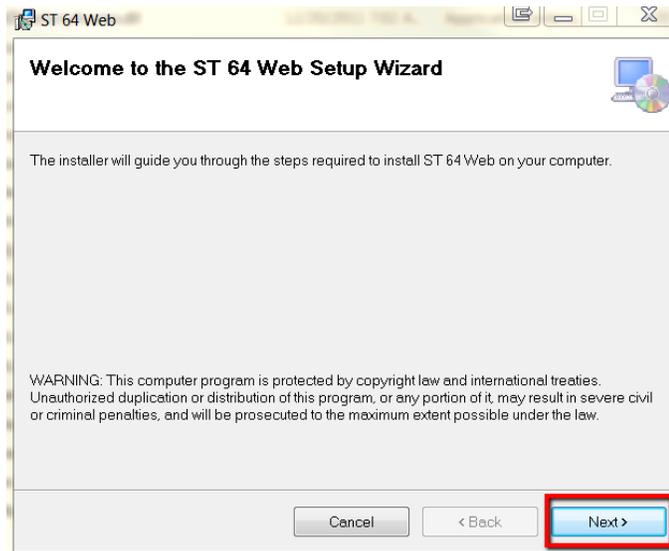


Figure 3.50 - Welcome to the ST 64 Web Setup Wizard dialog box

14. The Select Installation Address dialog box displays. Select the website on which to install the Synergy SIS software from the **Site** drop-down list, and select the **ASP.NET v4.0** application pool to use from the **Application Pool** drop-down list. To install it as the root of the website selected, leave the **Virtual Directory** box blank. It can also be installed in a subdirectory of the root by entering a new Virtual Directory name. To see what space it will take on the server, click the Disk Cost button. When finished configuring the installation, click **Next**.

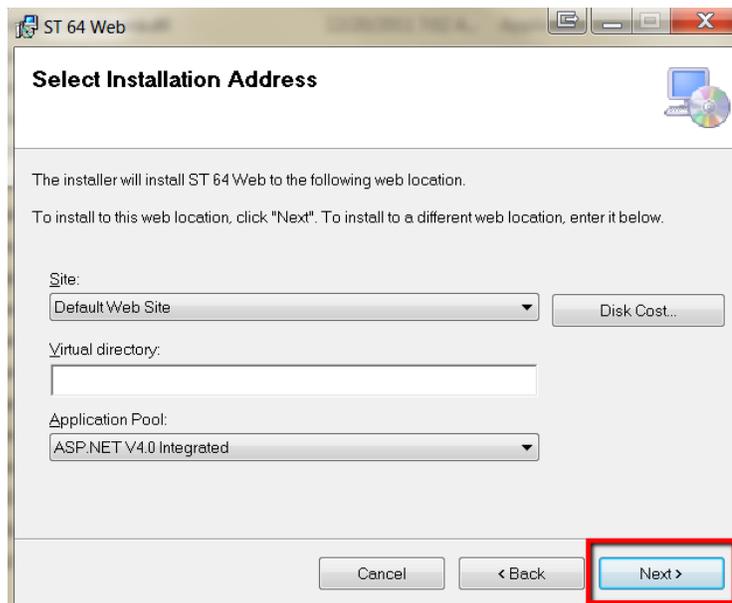


Figure 3.51 - Select Installation Address dialog box

15. The software displays the Confirm Installation dialog box. Click the **Next** button.
16. The software displays the Installing RT dialog box as the web server software is installed. A progress bar will indicate the progression of the installation.

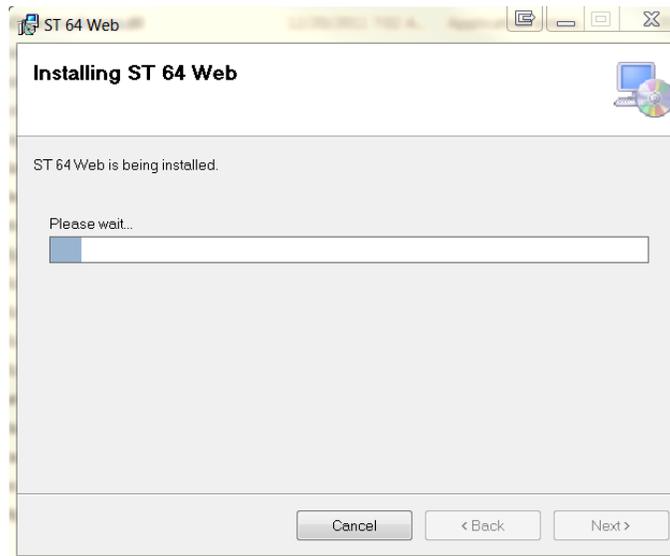


Figure 3.52 - Installing ST 64 Web dialog box

17. During this process, the software also displays the Updating Database dialog box as the database is installed. A progress bar will indicate the progression of the database installation.

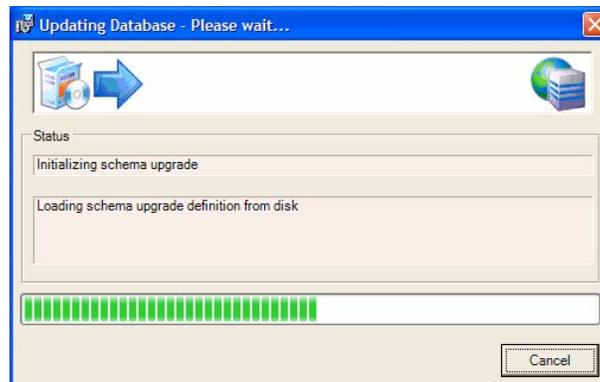


Figure 3.53 - Updating Database dialog box

18. Please wait for both of these processes to complete. Once complete, the software displays the Installation Complete dialog box. Click the **Close** button.

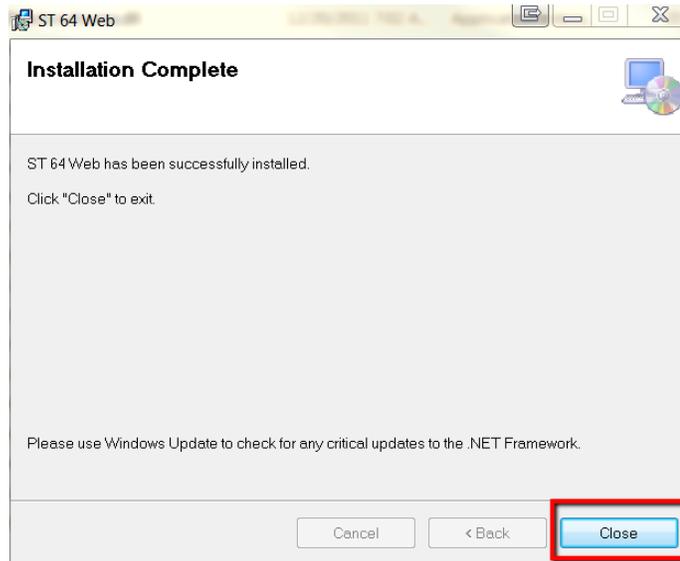


Figure 3.54 - Installation Complete dialog box

The web server software and the database are now installed! Additional web servers may now be installed as outlined below. The 64-bit process server should also be installed, as well as any other Synergy software as outlined in the sections later in this chapter.

To install additional web servers:

1. Find the folder on the server where the Synergy SIS release file has been extracted, as outlined in Chapter Two of this guide.
2. In the folder, find the **Synergy64WebSetup1** folder. Expand this folder to find and open the **Pre** sub-folder.
3. In the Pre sub-folder, double-click the **InstallUserPrompt.exe** file.

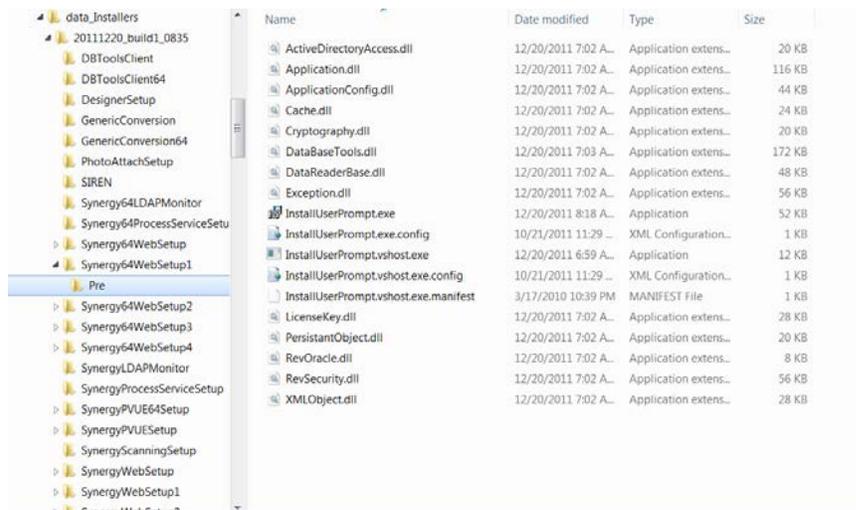


Figure 3.55 – Pre Folder, InstallUserPrompt.exe

4. The software displays the Welcome dialog box. Click the **Next** button.

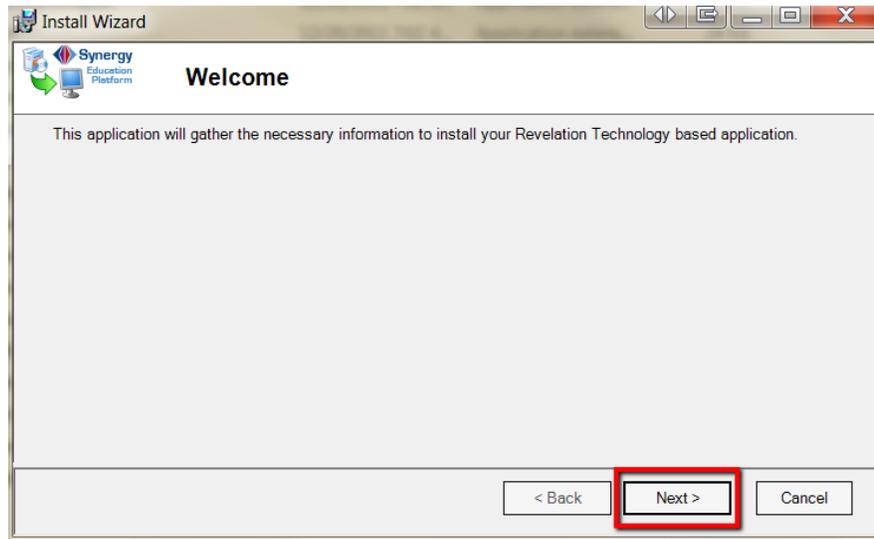


Figure 3.56 – Install Wizard Dialog Box

5. The software displays the Install Wizard Step 1: License Key dialog box. Enter the **Organization Name**, **Localization** and **License Key** information received from Edupoint. This information is e-mailed to the district following the purchase of the software. Click the **Next** button to continue the installation.

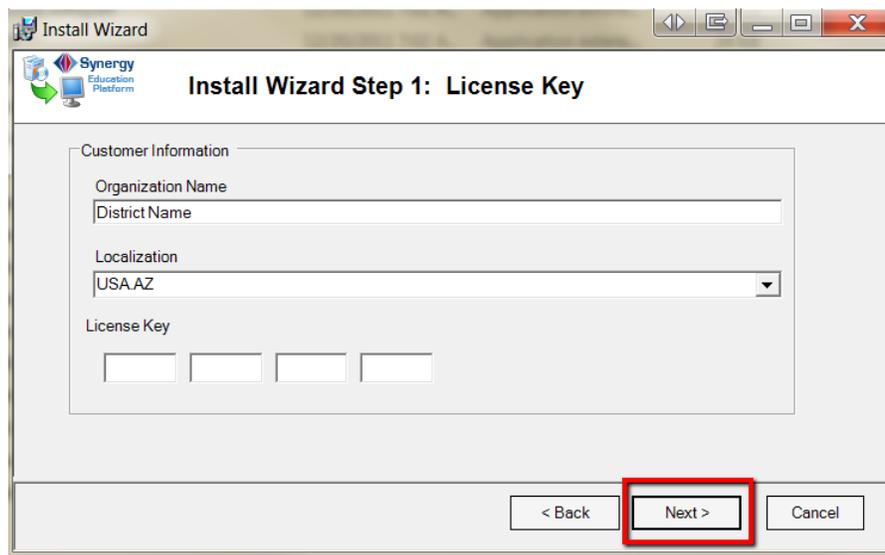


Figure 3.57 – Install Wizard Step 1: License Key Dialog Box

- The Install Wizard Step 2: Install Type dialog box appears next. Choose **Additional Web Server (Web Farm Servers 2+)** to install Synergy SIS on another web server. Check the box **Server is a member of a web farm**, and select the **IP address** from the drop-down list that will be used to communicate with the other web servers. If the server has multiple network cards, choose the IP address for the private LAN. Then click **Next**.

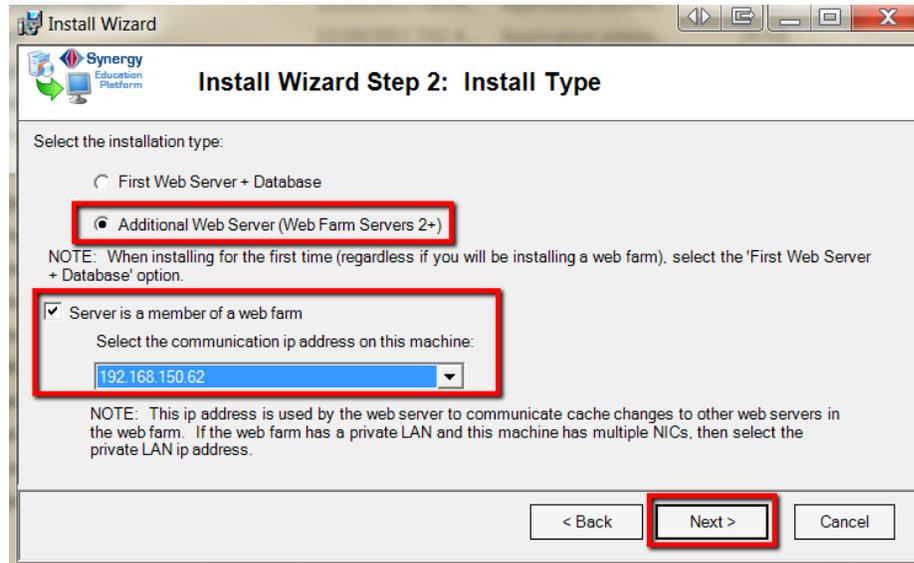


Figure 3.58- Install Wizard Step 2: Install Type Dialog Box

7. The software displays the Install Wizard Step 3: Database Settings dialog box. Choose the **type of database** used for the Synergy SIS installation - either the Microsoft SQL Server 2000+ database or Oracle 9i database. Then enter the values for each type of database as outlined below.

For SQL Server 2000+

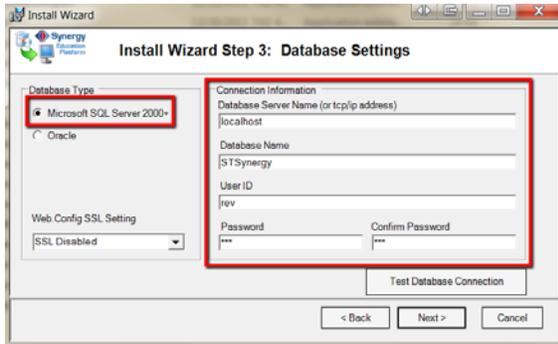


Figure 3.59 – Install Wizard Step 3: Database Settings Dialog Box, SQL

For Oracle 9i

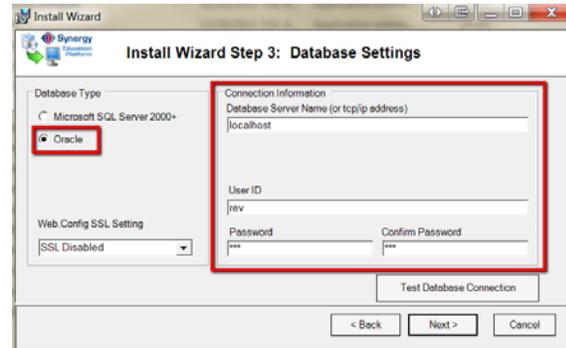


Figure 3.60 – Install Wizard Step 3: Database Settings Dialog Box, Oracle

- Enter the **server name** or TCP/IP address in the Database Server Name field.
 - Enter the **Database Name** in Database Name field.
 - Enter **rev** in the **User ID** field, the **Password** and **Confirm Password** fields.
8. Click the **Test Database Connection** button. The software displays the Connection Succeeded dialog box if the settings are entered correctly. Click **OK** to continue, and then click the **Next** button on the Install Wizard dialog box.



Figure 3.61 – Connection Succeeded Dialog Box.

9. The software displays the Finish dialog box. Click the **Finish** button.

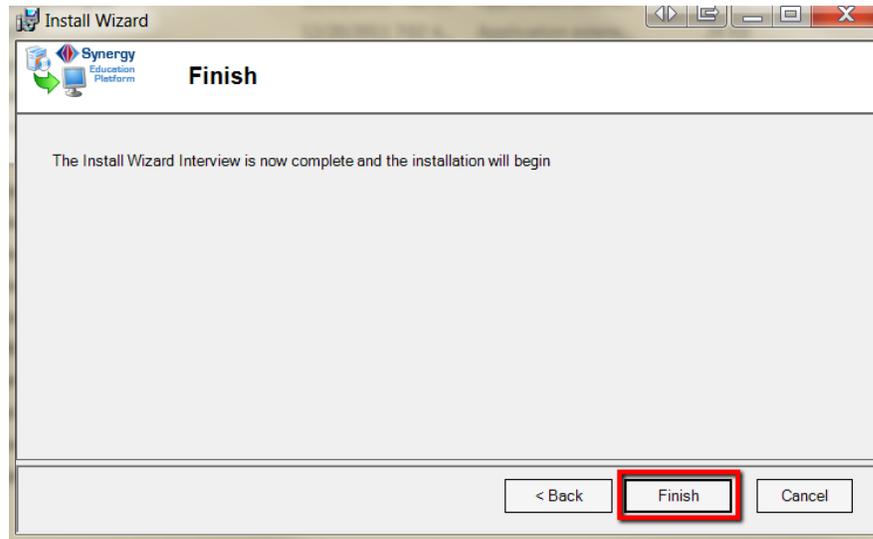


Figure 3.62 – Finish Dialog Box

10. The following web site warning dialog box may appear if other websites are setup by default on the web server. To overwrite the existing website on port 80, click **OK**. Otherwise, cancel the installation and move the existing website on port 80 to a different port or remove it from the server, and then restart the installation.

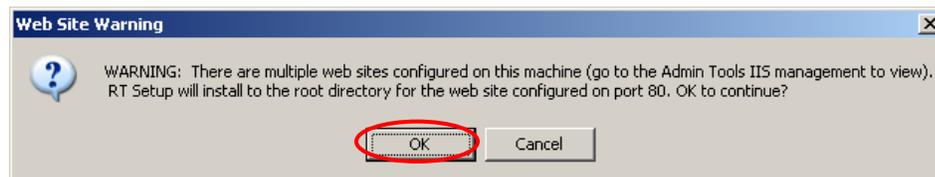


Figure 3.63 – Web Site Warning Dialog Box

11. The software displays the Welcome to the RT Setup Wizard dialog box. Click the **Next** button.

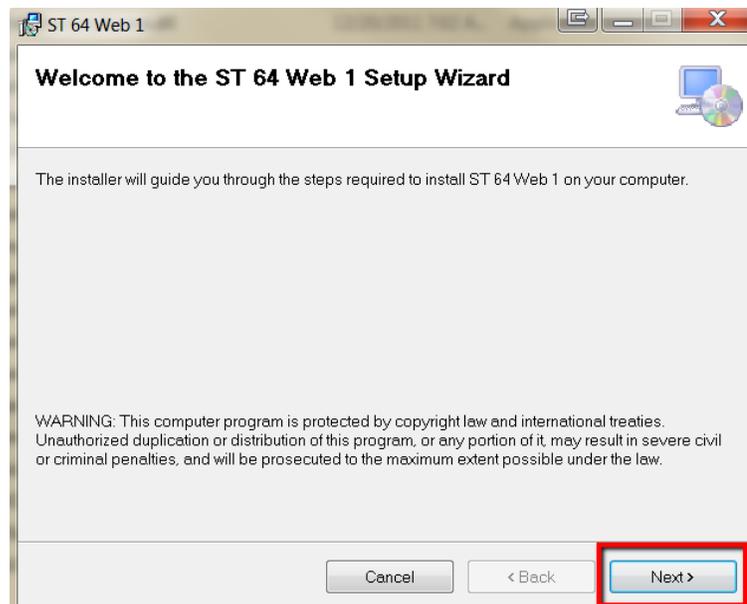


Figure 3.64 - Welcome to the ST 64 Web 1 Setup Wizard dialog box

- The Select Installation Address dialog box displays. Select the website on which to install the Synergy SIS software from the **Site** drop-down list, and select the **ASP.NET v4.0** application pool to use from the **Application Pool** drop-down list. To install it as the root of the website selected, leave the **Virtual Directory** box blank. It can also be installed in a subdirectory of the root by entering a new Virtual Directory name. To see what space it will take on the server, click the Disk Cost button. When finished configuring the installation, click **Next**.

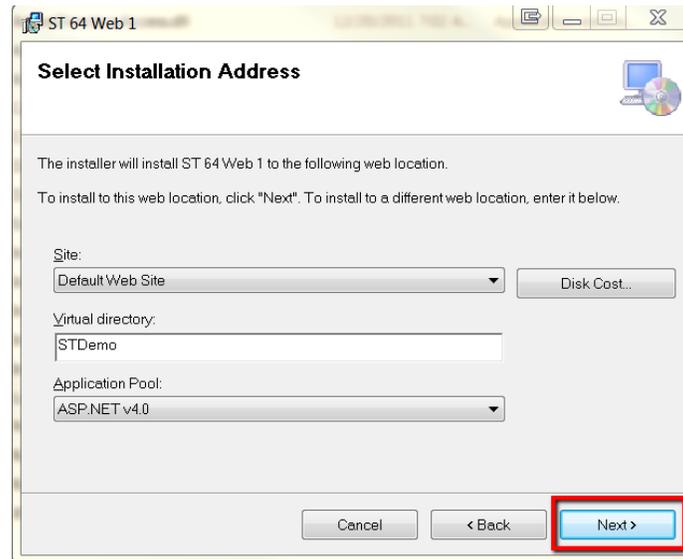


Figure 3.65 - Select Installation Address dialog box

- The software displays the Confirm Installation dialog box. Click the **Next** button.

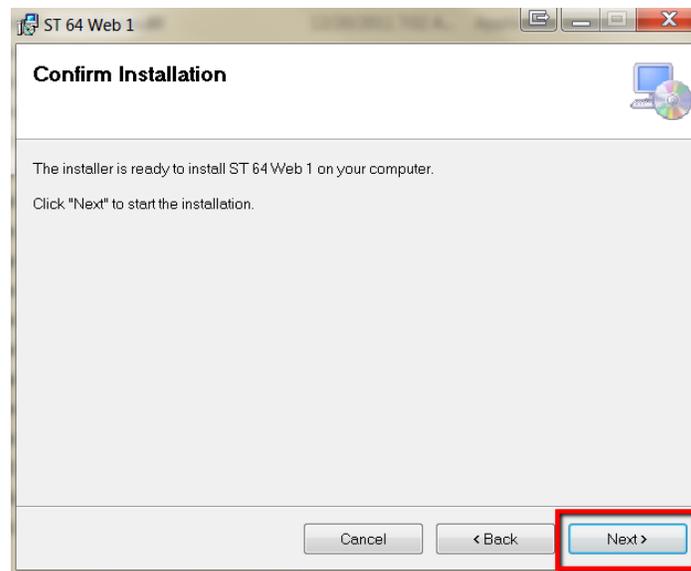


Figure 3.66 - Confirm Installation dialog box

- The software displays the Installing ST dialog box as the web server software is installed. A progress bar will indicate the progression of the installation.

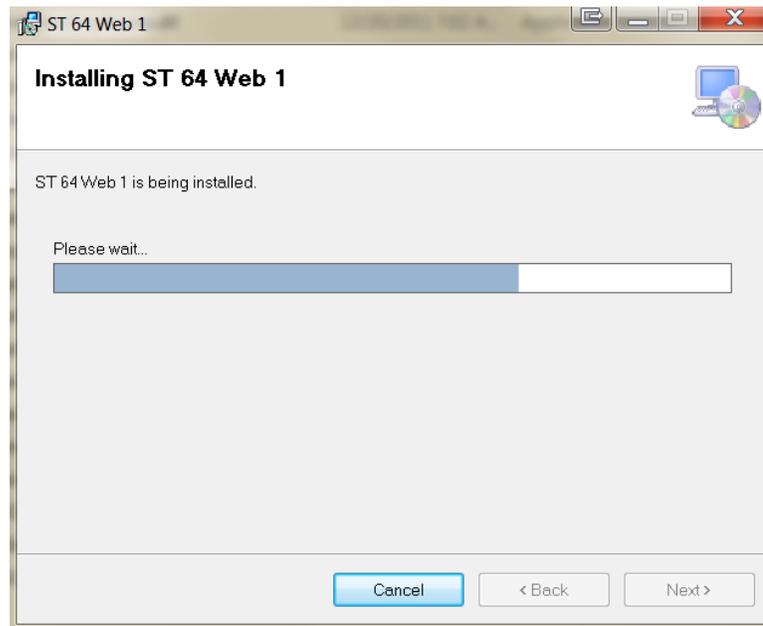


Figure 3.67 - Installing ST 64 Web 1 dialog box

- Please wait for this process to complete. Once complete, the software displays the Installation Complete dialog box. Click the **Close** button.

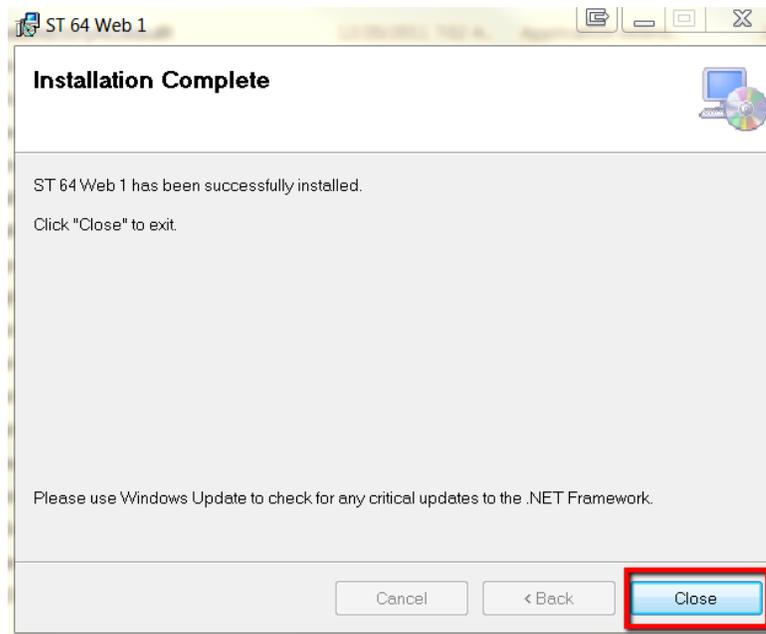


Figure 3.68 - Installation Complete dialog box

The additional web server is now installed! Repeat steps 1 through 15 to install each additional web server.

To install the 64-bit process server:

1. Find the folder on the server where the Synergy release file has been extracted, as outlined in Chapter Two of this guide.
2. In the latest release folder, find the **RT64ProcessServiceSetup** folder and right-click on the **Setup.exe** file. Select Run as administrator.

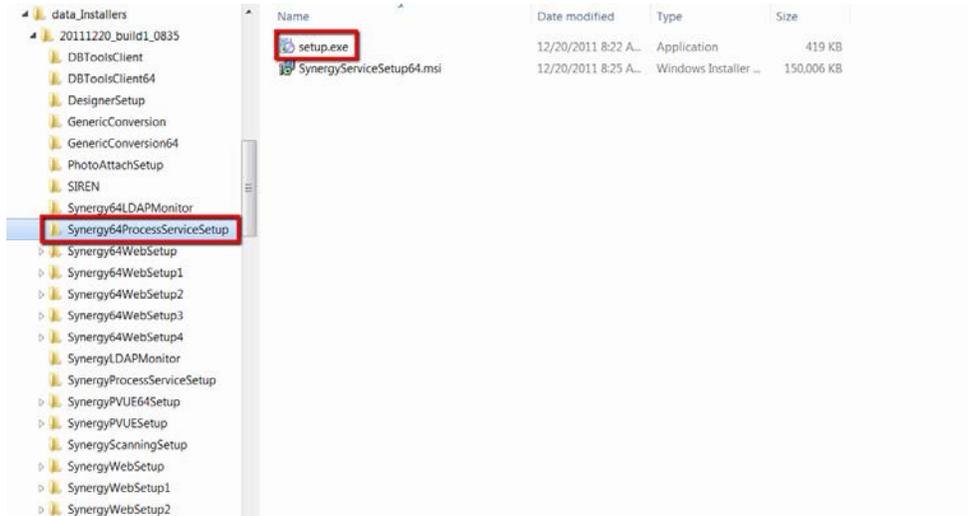


Figure 3.69 – Synergy64ProcessServiceSetup Folder

3. If Microsoft Visual C++ 2010 x86 Redistributable has already been installed, continue to the next step. If it has not yet been installed, the software displays a dialog to install Visual C++ 2010 Runtime Libraries (x86). Follow the prompts to download and install the software.

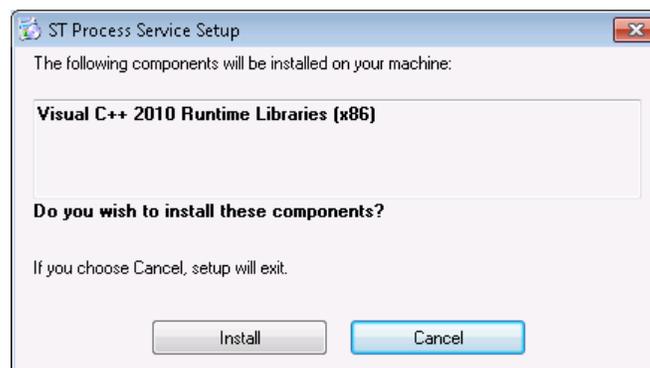


Figure 3.70 – Install Visual C++ 2010 Runtime Libraries (x86) dialog box

4. The software displays the Welcome to the RT Process Service Setup Wizard dialog box. Click the **Next** button to continue.

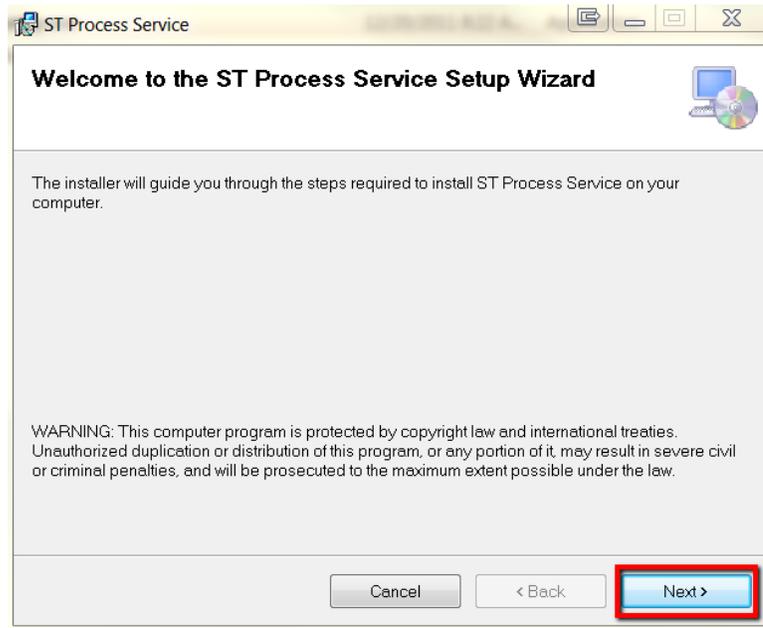


Figure 3.71 - Welcome to the ST Process Service Setup Wizard dialog box

- The software displays the Select Installation Folder dialog box. To change the default installation location (which is C:\Program Files\Edupoint\RT Process Service, either type the new location in the Folder box or click the **Browse** button to locate the new folder. To see what space the software will take on the drive, click the **Disk Cost** button.

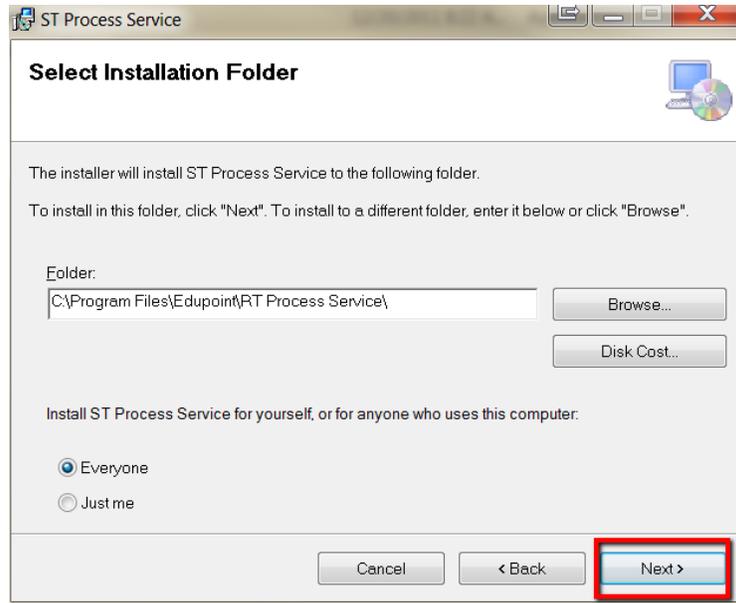


Figure 3.72 - Select Installation Folder dialog box

- Select the **Everyone** radio button to make the process server available for all server logons, or click Just me to install only for the currently logged in user. Click the **Next** button to continue.
- The software displays the Confirm Installation dialog box. Click the **Next** button to start the installation.

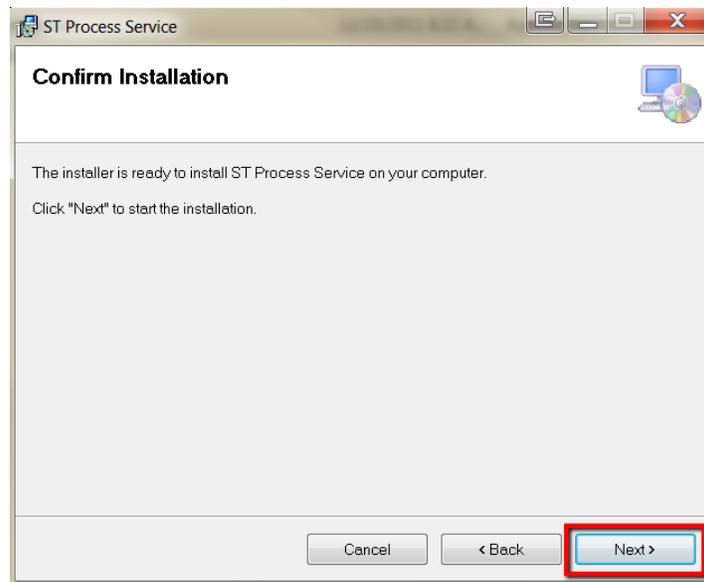


Figure 3.73 - Confirm Installation dialog box

- The Installing ST Process Service dialog box is displayed, with a progress bar to show the progress of the installation.

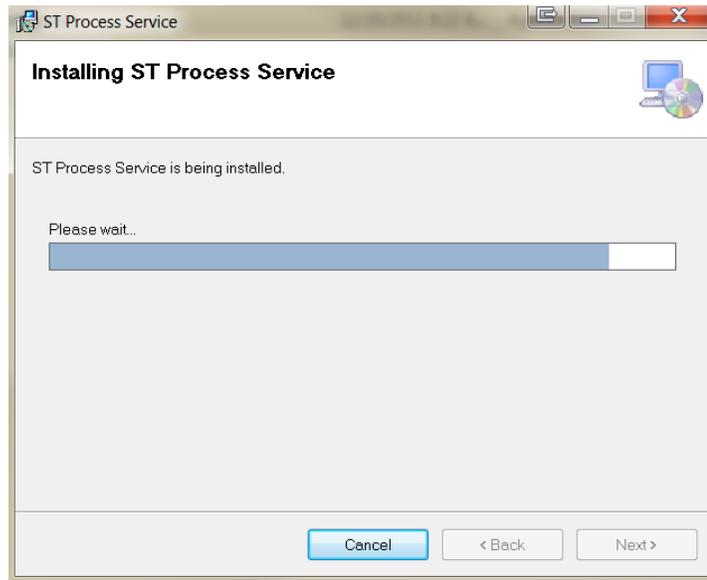


Figure 3.74 - Installing ST Process Service dialog box

- When the installation is complete, the Installation Complete dialog box is displayed. Click the **Close** button to finish the installation.

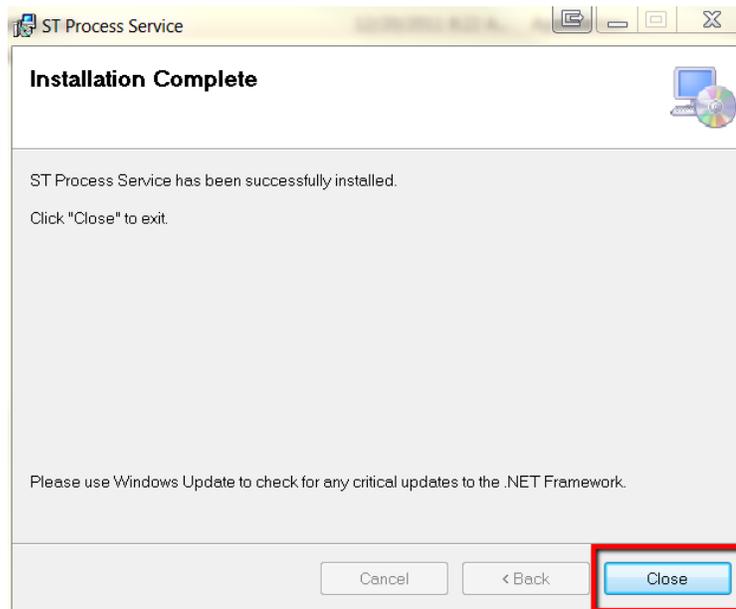


Figure 3.75 - Installation Complete dialog box

The process server is now installed. For information on starting and configuring the process server, please see the chapter on the ST Process Server in the *Synergy SIS – System Administrator Guide*.

All other 64-bit software is installed in the same manner as the 32-bit software, but using the software from the ST64_installers ZIP file instead.

OTHER Synergy SIS SOFTWARE INSTALLATION

The other software tools that can be installed with Synergy SIS are:

- **DB Tools** - Tool to manage the Synergy SIS database
- **Designer** - Tool to customize the Synergy SIS software – must be purchased separately-
- **Generic Conversion** - Converts data from any file and imports it to the Synergy SIS database
- **ParentVUE & StudentVUE** - A web-based interface for parents & students to access Synergy SIS data
- **Photo Attach** - Imports photos to the Student screen
- **ST Dashboard** - Tool to install patches to Synergy SIS servers & monitor servers
- **ST Scanning** - Scans attendance and grading sheets and imports the data to Synergy SIS
- **SASI 3 Conversion** - Converts SASI XP data to Synergy SIS
- **SASI XP Conversion** - Converts SASI XP data to Synergy SIS
- **SIREN** - Custom report development software

The instructions for installing each of these tools can be found in the following guides:

Software	Guide
DB Tools	Synergy SIS - System Administrator Guide
Designer	Revelation Technology Guide
Generic Conversion	Synergy SIS - Generic Conversion Guide
ParentVUE & StudentVUE	ParentVUE & StudentVUE Administrator Guide
Photo Attach	Synergy SIS -Student Information Administrator Guide
ST Dashboard	Chapter Five of this guide
ST Scanning	Synergy SIS - Student Information Administrator Guide
SASI 3 Conversion	Synergy SIS -SASI Conversion Guide
SASI XP Conversion	Synergy SIS -SASI Conversion Guide
SIREN	Synergy SIS - SIREN Guide

Chapter Four: UPGRADE TO A NEW RELEASE

In this chapter, the following topics are covered:

- ▶ How to upgrade to a new release
- ▶ The recommended steps in installing a new release

UPGRADE CHECKLIST

Edupoint issues upgrades or new releases of the Synergy SIS software twice a year, generally in July and January. The upgrades are provided free of charge to all current customers, and there are no additional upgrade costs. In between these major releases, patches may be available. For instructions on how to install patches, please see Chapter Five.

To install a new release:

- Download the new release.
- Install the new release as a test system & test all functionality.
- Turn off access to the system.
- Backup the database. Also, back up the web server (optional).
- Uninstall the process servers
- Uninstall all other Synergy SIS software (scanning, DBTools, etc.)
- Uninstall the web servers
- Install the new release

Detailed instructions for each of these steps can be found in the sections of this chapter.

DOWNLOAD THE NEW RELEASE

To download the new release, follow the steps in the section titled Obtaining the Latest Release in Chapter Two of this guide. Each release also has a PDF outlining the changes in the latest release. Be sure to read the PDF to see what changes may affect the district, and prepare instructions for the end users on any new functionality.

INSTALL A TEST VERSION

Install a test version of the new release as outlined in the section titled Test/Training Server Installation in Chapter Three of this guide. Before installing the test version, any test version of Synergy SIS web servers or process servers on the test server(s) must be uninstalled as outlined in the sections Uninstall the Web Server or Uninstall the Process Server later in this chapter. The process server used with the test version must be from the same release as the web server software.

TURN OFF ACCESS

Before beginning the upgrade process, access to the Synergy SIS software for end users should be turned off. If using LDAP integration, an easy way to remove access for end users but keep all systems up and running is to turn off LDAP integration on the System Configuration screen of Synergy SIS. Since users will not know their native Synergy SIS password, this effectively locks them out of the system. **Be sure the administrator(s) of the system do know the native Synergy SIS password for the admin logon for the district's Synergy SIS system.** To turn off LDAP integration:

1. Go to the **System Configuration** screen, found under Synergy SIS > System > Setup.

The screenshot shows the 'System Configuration' window with the 'LDAP Integration' section expanded. The 'Using LDAP' checkbox is circled in red. Below it, the 'LDAP Server Type' is set to 'Microsoft Active Directory' and the 'Integration Type' is set to '1. Password Authentication'. The 'Domain Name' is 'xnovahq' and the 'Server Path' is 'LDAP://az3.xnova.com'. There is a note about auto-creating staff entries and a 'Role Property' section with checkboxes for 'Counselor', 'Maintenance', and 'Teacher'.

Figure 4.1 – System Configuration Screen

2. Uncheck the box labeled **Using LDAP**.
3. Click the **Save** button at the top of the screen.

If not using LDAP integration, access for users can be restricted during the upgrade by using the Default Entry Access Times. Do not set the default entry times on the System Configuration screen, or this will lock out all users including administrators. To restrict the users from logging on but retain access for administrators:

1. Go to the **User Groups** screen, found under Synergy SIS > System > User.
2. For each group of users, click on the **Security Settings** tab and enable the default entry access times, setting a beginning and ending time outside the time period for the upgrade.

The screenshot shows the 'User Groups' screen for the 'Role - Admin' group. The 'Security Settings' tab is active. Below the 'Default Entry Access Times' section, there is a table with the following structure:

Line	Day of Week	Enabled	Access Time Period	
			Begin	End
1	Monday	<input type="checkbox"/>		
2	Tuesday	<input type="checkbox"/>		
3	Wednesday	<input type="checkbox"/>		
4	Thursday	<input type="checkbox"/>		
5	Friday	<input type="checkbox"/>		
6	Saturday	<input type="checkbox"/>		
7	Sunday	<input type="checkbox"/>		

Figure 4.2 – User Groups Screen, Security Settings Tab

3. Be sure to set the access times for the administrator group to No to disable any time restrictions for administrators.



Caution: Using either the LDAP integration or Default Entry Access Times methods to restrict users' access to Synergy SIS will not block users that are currently logged into Synergy SIS. It will only prevent users from logging on to the system. To remove all access for even currently logged in users, stop the World Wide Web Publishing service on each web server. Be sure to check the Job Queue screen as well to ensure all jobs have cleared the process server before the upgrade.

BACKUP

As a precaution, please backup a copy of the existing web server directory, the current release zip file and any patches that have been applied, and the database before upgrading to a new release. To backup each piece:

- **Web Server Directory** – copy the root directory/folder of the Default Web Site on each web server to another folder. If Synergy SIS was installed to a different folder, be sure to copy that folder as well. The backup folder can always be copied back to the original location if access to the previous release is needed, or it can be accessed from its new location if retained in the website folder by appending the new folder name to the web address.
- **Release/Patches Files** – keep a copy of the previous release and a copy of any patches applied in case it is necessary to re-install the previous release. Note which patches were installed.
- **Database** – while the database can be automatically backed up as part of the installation of the new release, it is always advisable to make a separate backup. To back up a SQL server database, right-click on the database from within SQL Server Management Studio and choose Backup Database from the Tasks menu.



Caution: Only data for the current year can be uploaded to the state from the latest release. If it is necessary to upload data for previous years, the web server directory for that year, the database for that year, and the process server for that year must be installed and maintained separately from the current release.



Note – By default, when installing a new release of the Synergy SIS software over an existing installation, the Microsoft SQL Server database is automatically backed up before any changes are made to the database. To disable this automatic backup, check the box labeled **Disable the Pre-Installation Backup of the MSSQL Server database**, on the Options tab of the System Configuration screen, found under Synergy SIS > System > Setup. To change the location where the backups are stored, enter the new path in the box provided. By default, the backups are saved to C:\Program Files\Microsoft SQL Server\MSSQL\Backup.

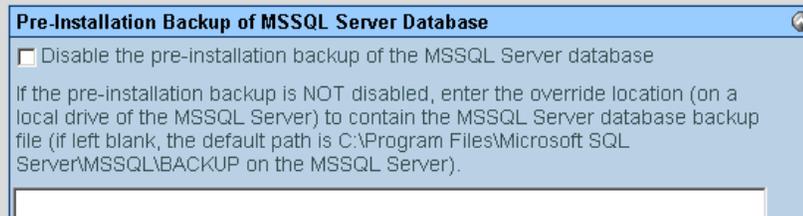


Figure 4.3 – Pre-Installation Backup Options

UNINSTALL THE WEB SERVERS

To uninstall the web servers:



Note – It may be necessary to remove some files manually, including custom installations. When this situation arises, please contact the Edupoint technical support team at support@edupoint.com or by phone at 1-877-899-9111 option 1.

1. On the server, open the **Control Panel** and select **Add or Remove Programs (Programs and Features in Windows Server 2008)**.
2. The Add or Remove Programs dialog box is displayed. Click on the **ST** program in the list, and click the **Remove (Uninstall in Windows Server 2008)** button.

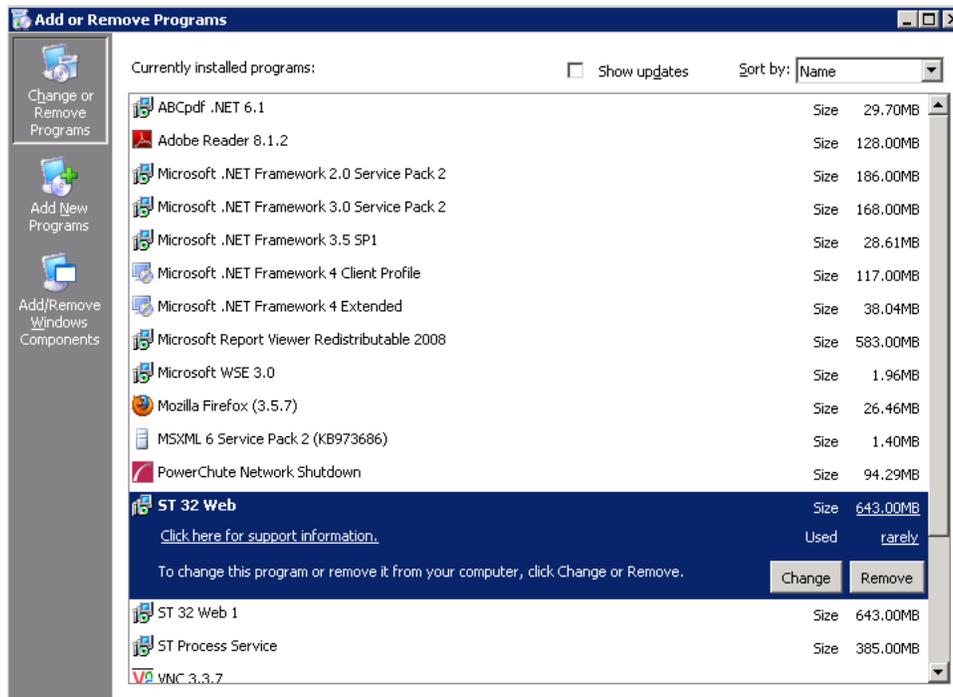


Figure 4.4 – Add or Remove Programs Dialog Box

3. A confirmation message pops-up to confirm the removal. Click the **Yes** button to uninstall the software.

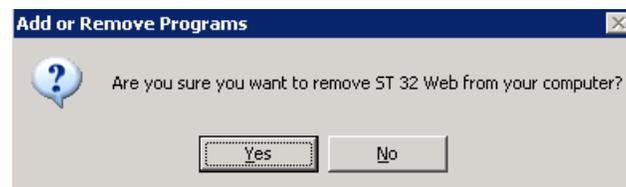


Figure 4.5 - Confirmation Box

- The Progress Bar is displayed to indicate the progress of the removal.



Figure 4.6 – The Progress Bar

- Repeat Steps 1 through 4 to uninstall each additional web server.

UNINSTALL THE PROCESS SERVERS

To uninstall the process servers:

- Open the ST Process Service Setup program by double-clicking the Process Server icon on the task bar, located in the lower-right corner of the screen. If the icon does not appear in the task bar, click on the **Start** menu and go to the **Edupoint** folder under **All Programs**. Click on the **RTProcessSetup** program.



Figure 4.7 – Task Bar



Figure 4.8 – All Programs Menu

- In the RT Process Service Setup program, click the **Stop Service** button.

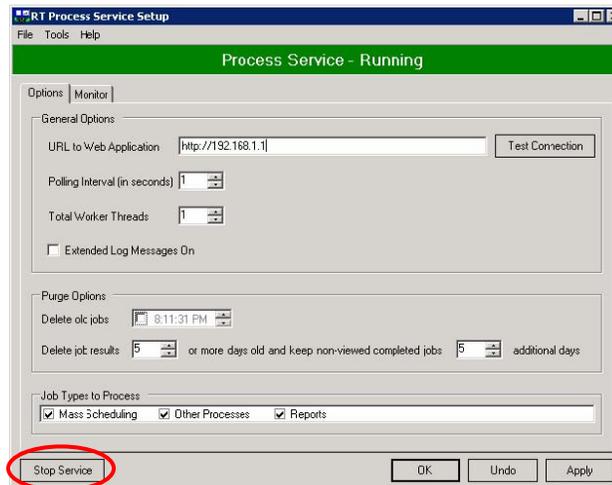


Figure 4.9 – RT Process Service Setup

- The Process Service ribbon at the top of the page turns red and says Stopped when the process is stopped. Click the **OK** button.

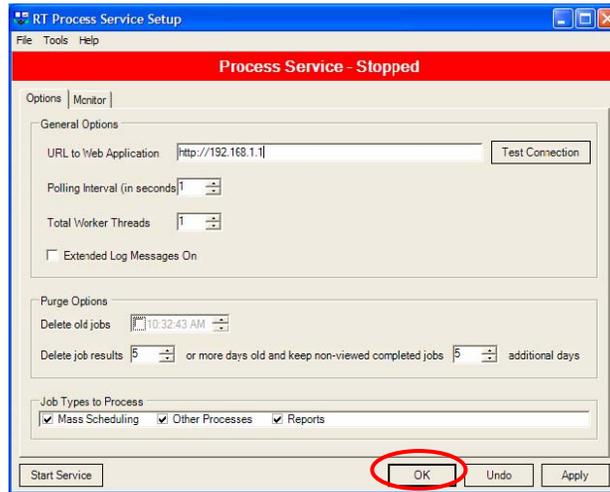


Figure 4.10 – RT Process Service Setup, Stopped

- On the server, open the **Control Panel** and select **Add or Remove Programs (Programs and Features in Windows Server 2008)**.
- The Add or Remove Programs dialog box is displayed. Click on the **RT Process Service** program in the list, and click the **Remove (Uninstall in Windows Server 2008)** button.

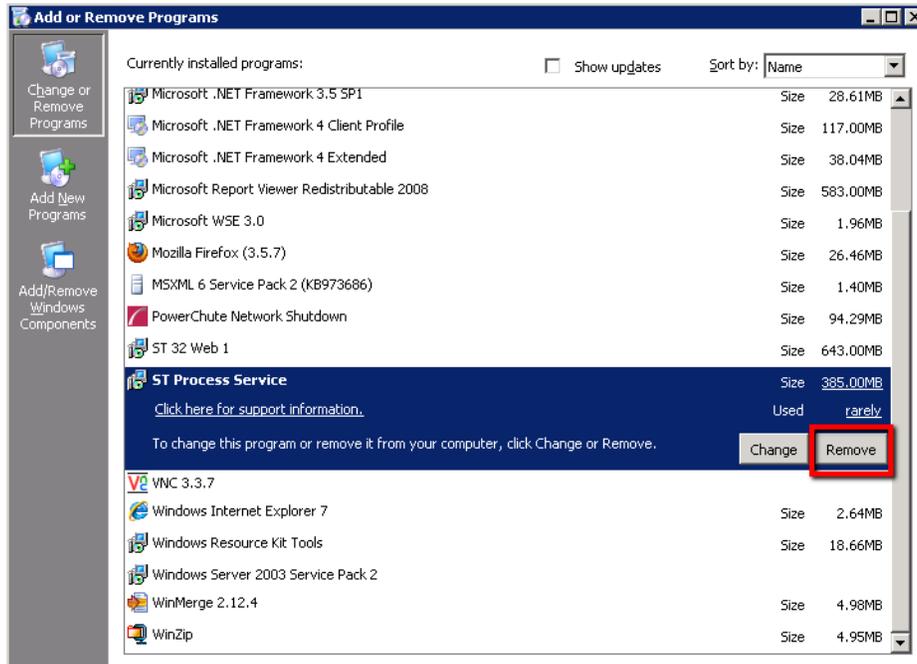


Figure 4.11 – Add or Remove Programs

6. A confirmation message pops-up to confirm the removal. Click the **Yes** button to uninstall the software.

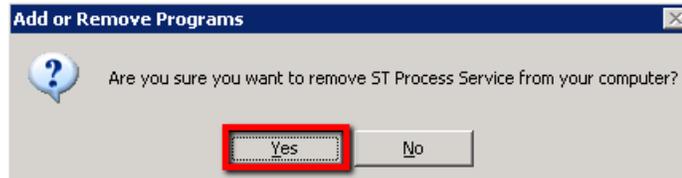


Figure 4.12 – Confirmation Message

7. The Progress Bar is displayed to indicate the progress of the removal.

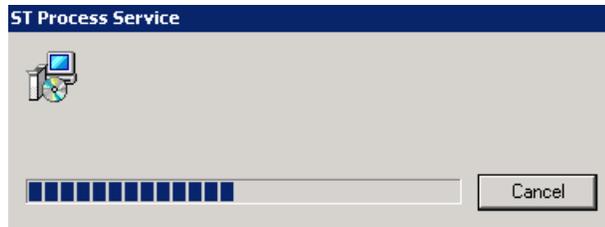


Figure 4.13 – The Progress Bar

UNINSTALL ALL OTHER Synergy SIS SOFTWARE

Any additional software installed, such as the DB Tools program or the Dashboard program, should be uninstalled prior to the upgrade as well. To uninstall other Synergy SIS software:

1. On the server where the software is installed, open the **Control Panel** and select **Add or Remove Programs (Programs and Features in Windows Server 2008)**.
2. The Add or Remove Programs dialog box is displayed. Find the name of the other software in the list and click on it. Then click the **Remove (Uninstall in Windows Server 2008)** button.

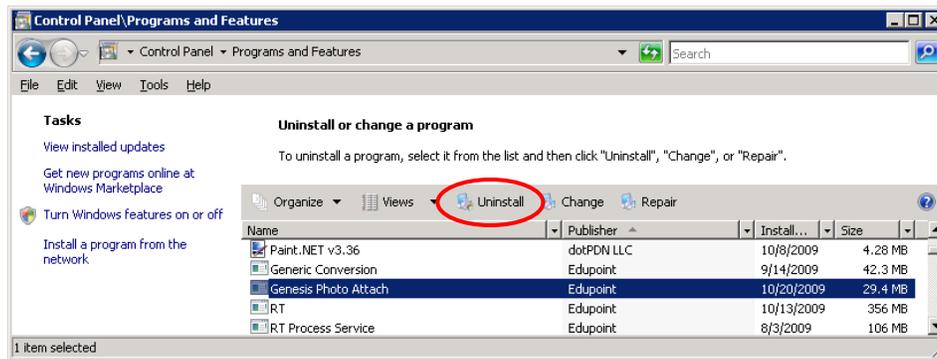


Figure 4.14 – Add or Remove Programs Dialog Box

3. A confirmation message pops-up to confirm the removal. Click the **Yes** button to uninstall the software.

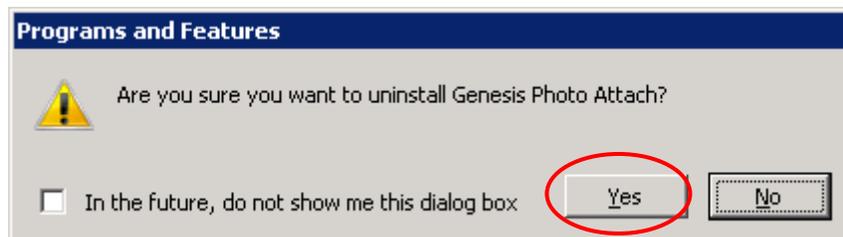


Figure 4.15 - Confirmation Box

4. The Progress Bar is displayed to indicate the progress of the removal.

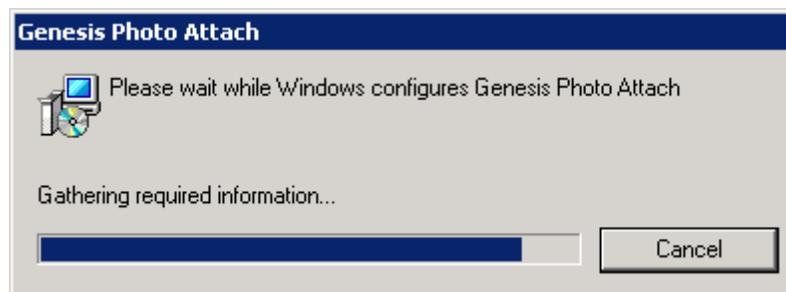


Figure 4.16 – The Progress Bar

5. Repeat Steps 1 through 4 to uninstall each additional program.

INSTALL THE NEW RELEASE

After everything has been uninstalled and backed up, install the new release following the instructions in Chapter Three of the guide. The new release should be installed in the following order:

- Install the web servers
- Install the process servers
- Reset IIS (optional)
- Logon to the web servers
- Start the process servers
- Install all other Synergy SIS software (scanning, DBTools, etc.)



Tip: After an upgrade or re-installation, it may take a long time to load the initial page of Synergy SIS. After that, normal speed should resume. To speed up this process, restart the Default Web Site (or the web site where Synergy SIS is installed) after installation or restart IIS.

Chapter Five: PATCH INSTALLATION

In this chapter, the following topics are covered:

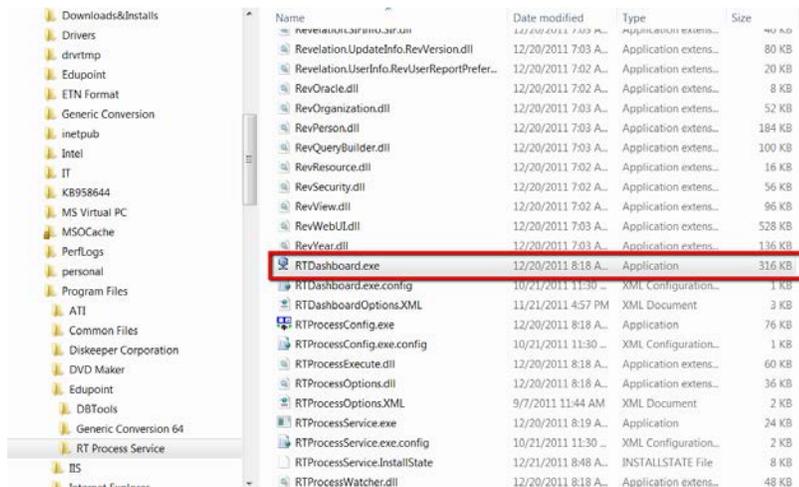
- ▶ How to install the ST Dashboard software
- ▶ How to setup the ST Dashboard software
- ▶ How to apply a patch to the Synergy servers
- ▶ Available dashboard options
- ▶ How to use the dashboard to manage servers

SETTING UP ST DASHBOARD

The ST Dashboard software provides an easy way to deploy patches to multiple Synergy web, process and database servers. The ST Dashboard software can be installed on a central server and deploy patches from the central server to all Synergy servers in the district. It can even be installed on a workstation for deployment. By default, the software is installed with the Process Server software. To install it on a different server, install the Process Server but do not start it.

After installing the ST Dashboard, the next step is to add all of the Synergy servers to the dashboard so they can be managed. Servers can be added to the dashboard automatically, or they can be added manually. Servers can also be grouped together to make managing them easier. To add the servers to the dashboard automatically:

1. Start the ST Dashboard program by opening an Explore window and locating the Process Service Folder (usually found here: C:\Program Files\Edupoint\RT Process Service). Double click the RTDashboard.exe to launch the Dashboard.



2. The Dashboard window will open.

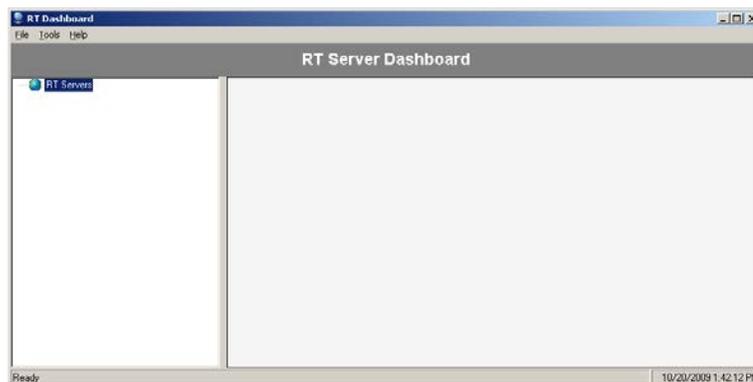


Figure 5.1 – RT Dashboard

- From the Tools menu, click on Auto Discover Servers...

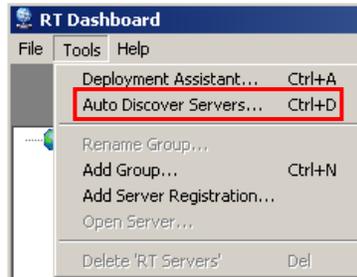


Figure 5.2 – Tools Menu

- Select the type of server to search for (either **Database**, **Process**, **Web**, or **All**) from the **Server Type** drop-down list and click the **Start Search** button.

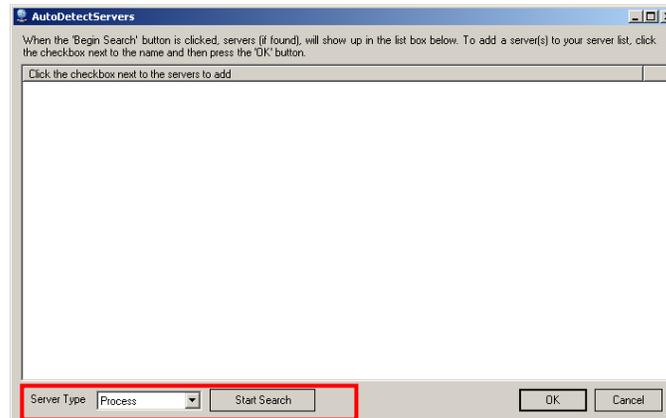


Figure 5.3 – AutoDetect Servers

- The servers found will be listed above. Click on the **checkbox** next to the servers to add, and click the **OK** button.

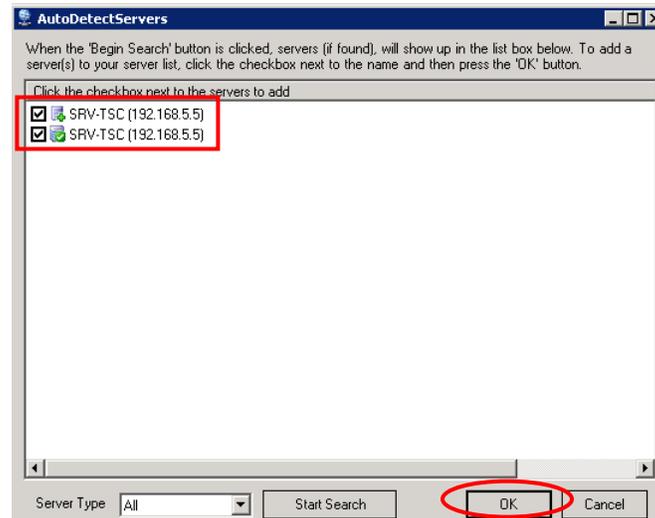


Figure 5.4 – AutoDetectServers, Servers Found

- The servers will then be listed in the main RT Dashboard window.

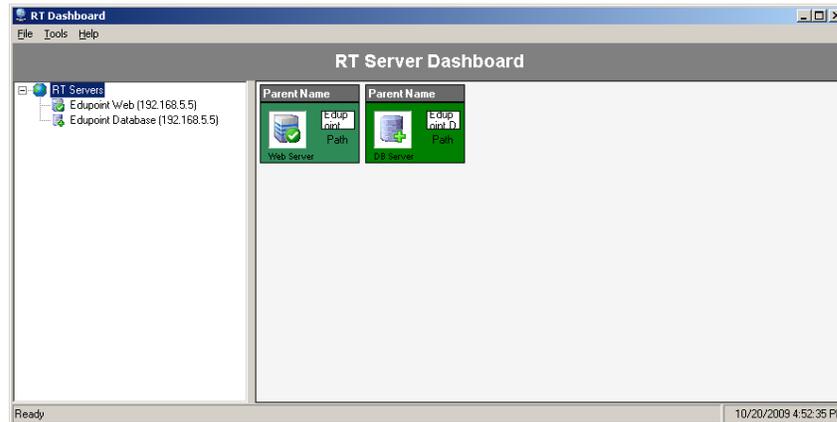


Figure 5.5 – RT Dashboard, Servers Listed

To add a server manually:

- From the Tools menu, click on Add Server Registration...

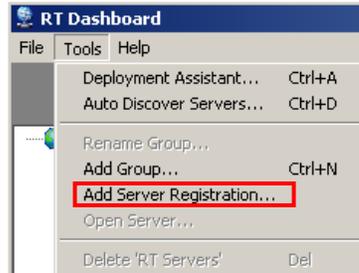


Figure 5.6 – Tools Menu

- The AddServer window pops-up. To add a process server, enter the **Server IP Address** and select **Process** as the Type of Server. Click the **OK** button to add it.

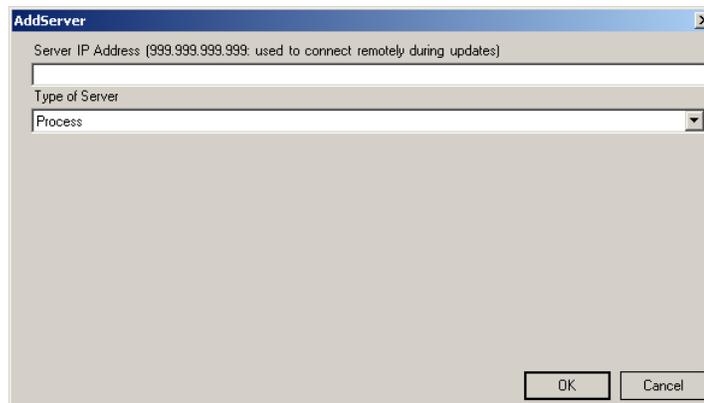
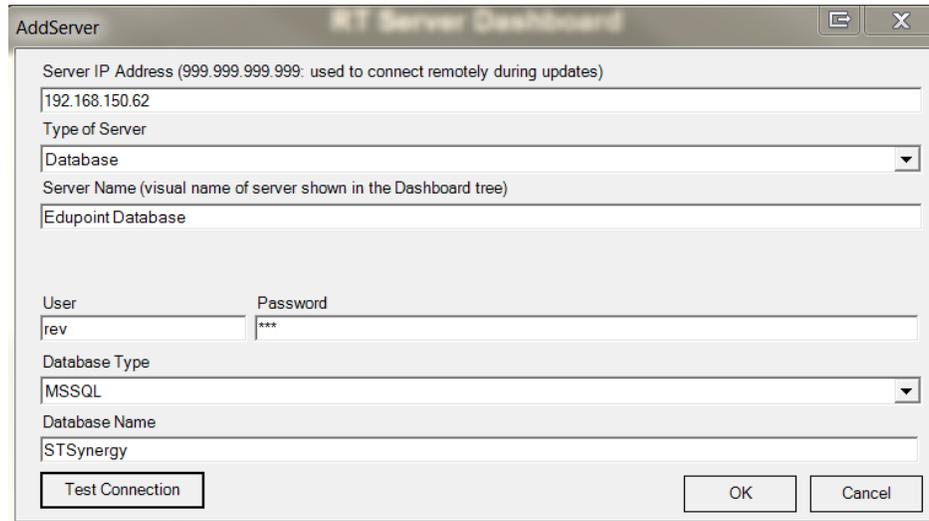


Figure 5.7 – Adding a Process Server

- To add a database server, select **Database** from the **Type of Server** drop-down list. Enter the **Server IP Address**, and enter the name to display in the Dashboard tree in the **Server Name** box. The server name can be anything. Enter **rev**, **rev** for the **User** and **Password**, and select the **Database Type** from the drop-down list (either MSSQL or Oracle). Enter the name of the database in the Database Name box, and then click the Test Connection button.



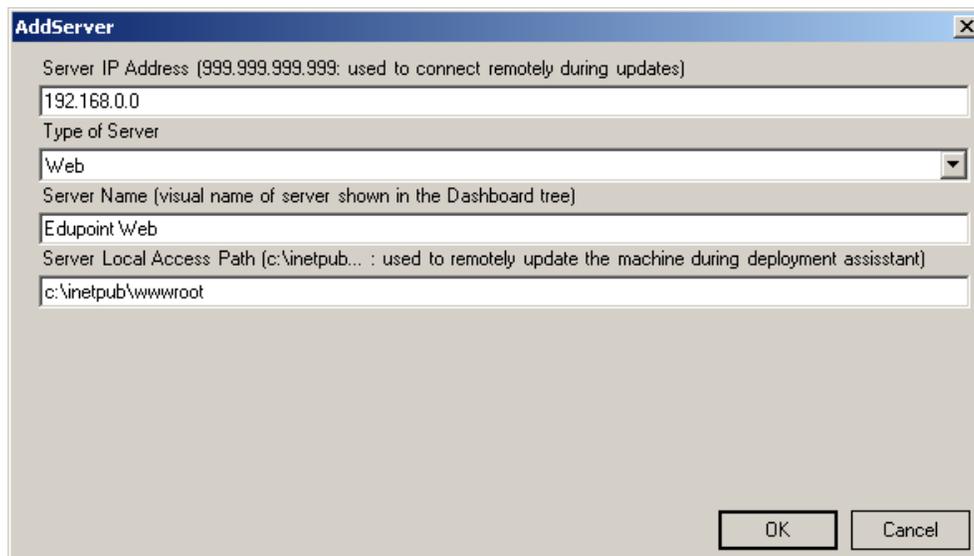
The screenshot shows the 'AddServer' dialog box with the following fields and values:

- Server IP Address (999.999.999.999: used to connect remotely during updates): 192.168.150.62
- Type of Server: Database
- Server Name (visual name of server shown in the Dashboard tree): Edupoint Database
- User: rev
- Password: ***
- Database Type: MSSQL
- Database Name: STSynergy

Buttons: Test Connection, OK, Cancel

Figure 5.8 – Adding a Database Server

- If the connection works, click **OK** to add the database server.
- To add a web server, select **Web** from the **Type of Server** drop-down list. Enter the **Server IP Address**, and enter the name to display in the Dashboard tree in the **Server Name** box. The server name can be anything. Enter the folder where the web server is located on the server in the **Server Local Access Path** box, such as c:\inetpub\wwwroot. Click **OK** to add the web server.



The screenshot shows the 'AddServer' dialog box with the following fields and values:

- Server IP Address (999.999.999.999: used to connect remotely during updates): 192.168.0.0
- Type of Server: Web
- Server Name (visual name of server shown in the Dashboard tree): Edupoint Web
- Server Local Access Path (c:\inetpub... : used to remotely update the machine during deployment assistant): c:\inetpub\wwwroot

Buttons: OK, Cancel

Figure 5.9 – Adding a Web Server

Once the servers have been added, they can be separated into groups so that groups of servers can be managed together. For example, the web servers could be grouped together, or all of the servers used for testing could be grouped. To add a group:

1. From the **Tools** menu, click on **Add Group...**

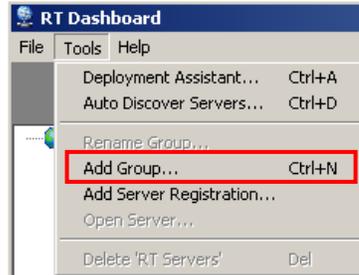


Figure 5.10 – Tools Menu

2. The Add Group window pops-up. Enter a **name** for the new group and click **OK**.



Figure 5.11 – Adding a Group

3. Once the new group has been added, servers can be added to the group by dragging and dropping servers into the group. Alternatively, they can be added manually if they are not listed already by clicking on the group, and then clicking on the Tools menu and selecting Add Server Registration.
4. To rename a group, click on the group and then click on the **Tools** menu and select **Rename Group**.



Figure 5.12 – Tools Menu

5. Enter the new name of the group, and then click **OK**.

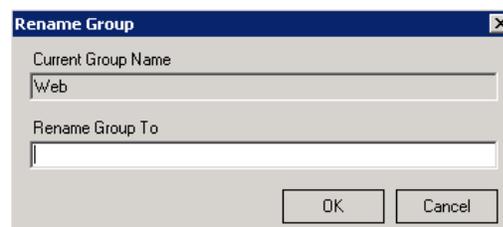


Figure 5.13 – Rename Group

- To delete a group, click on the group and then click on the **Tools** menu and select **Delete <GROUPNAME>**.

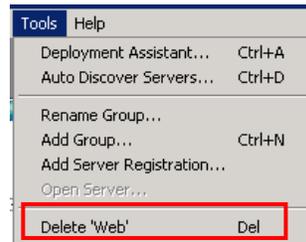


Figure 5.14 – Tools Menu

- A confirmation message pops-up to verify the group should be deleted. Click the **OK** button to delete the group.

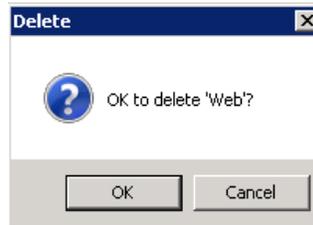


Figure 5.15 – Confirmation Message

- The group and any servers listed under the group are removed from the dashboard.



Caution: Once all the servers have been added, be sure to click on **File...Save Settings** to save all of the servers and groups that have been listed.

APPLYING A PATCH

Once the servers have been added to the dashboard, patches can be applied to all of the servers listed in the dashboard at one time, or each server can be patched individually. To apply a patch to the server:

1. **Download** the patch file from the FTP site, as outlined in [Chapter Two](#) of this guide.
2. **Extract** the patch file to a location on the server/workstation where the RT Dashboard software is installed.



Note – The patches can be installed on either 32-bit or 64-bit installations. The patches are all in one PKG file, and there is not a separate patch file for 64-bit installations.

3. If the web server will be patched, turn off access to the web servers as outlined in Chapter Four.

- From RT Dashboard, click on the **Tools** menu and select **Deployment Assistant**.

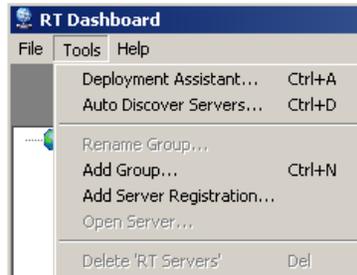


Figure 5.16 – Tools Menu

- The Deployment Assistant window pops-up. To select which files from the patch to deploy, click on the **Choose Files** button.

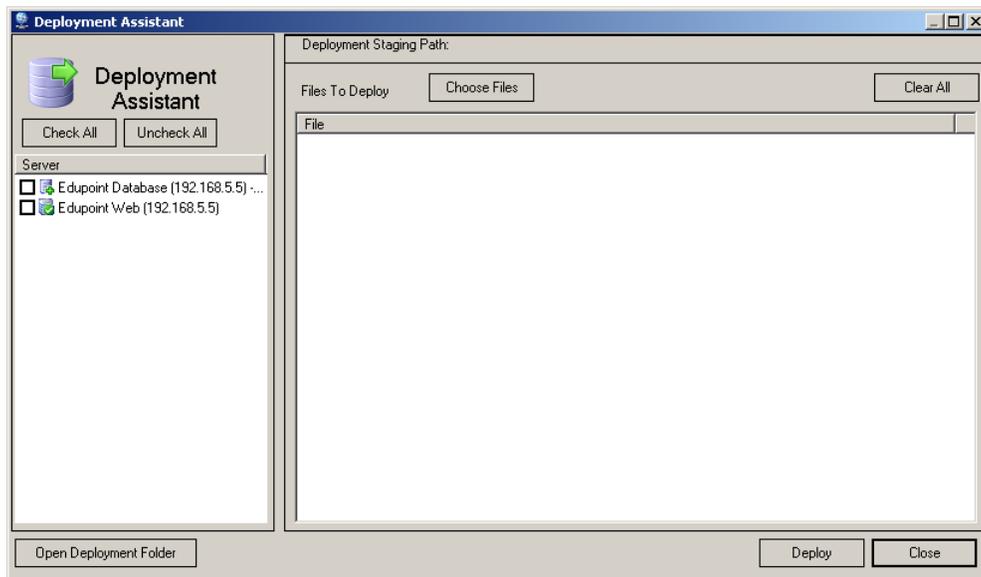


Figure 5.17 – Deployment Assistant

6. Navigate to the folder in which the extracted patch is located.

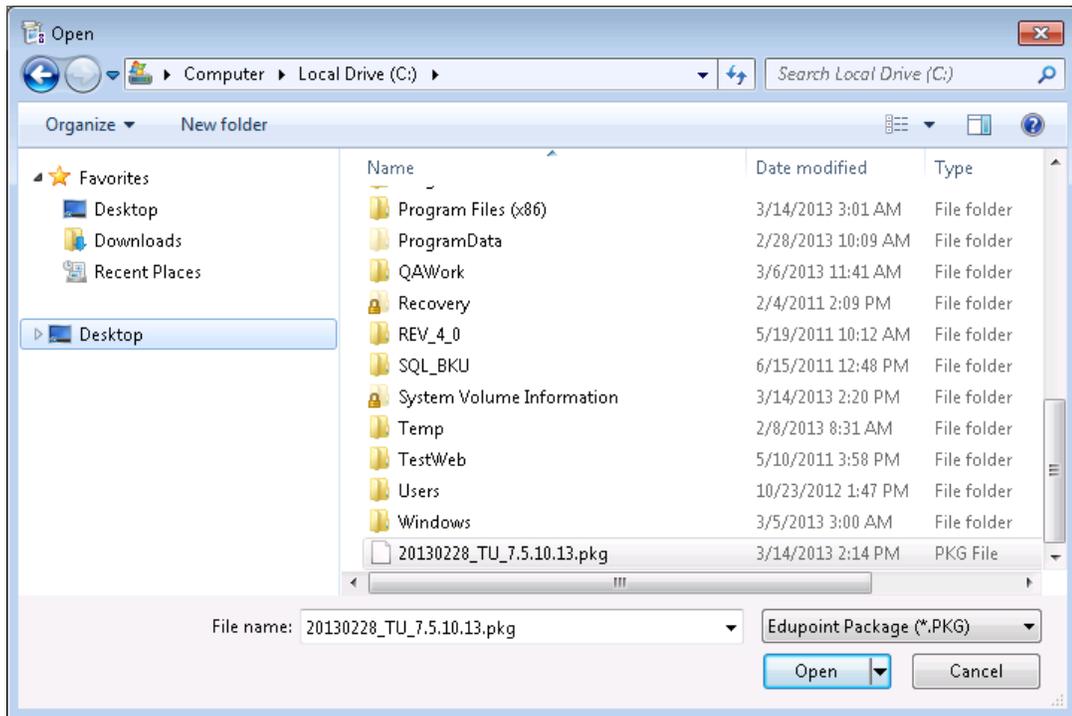


Figure 5.18 – Selecting Deployment Files

7. Select which types of files to select from the drop-down list in the bottom right-hand corner. **Application Files** and **RT_PAD** files generally need to be deployed to both the web servers and process servers. **SQL Files** need to be deployed to the SQL server. To keep everything working together, all files eventually need to be deployed to all the servers but they can be deployed one type at a time. Select **All Files** to deploy the patch in one step.

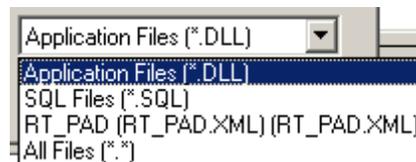


Figure 5.19 – Types of Deployment Files

8. Choose the package to deploy by clicking on it. Once the file to be deployed is highlighted, click the **Open** button.

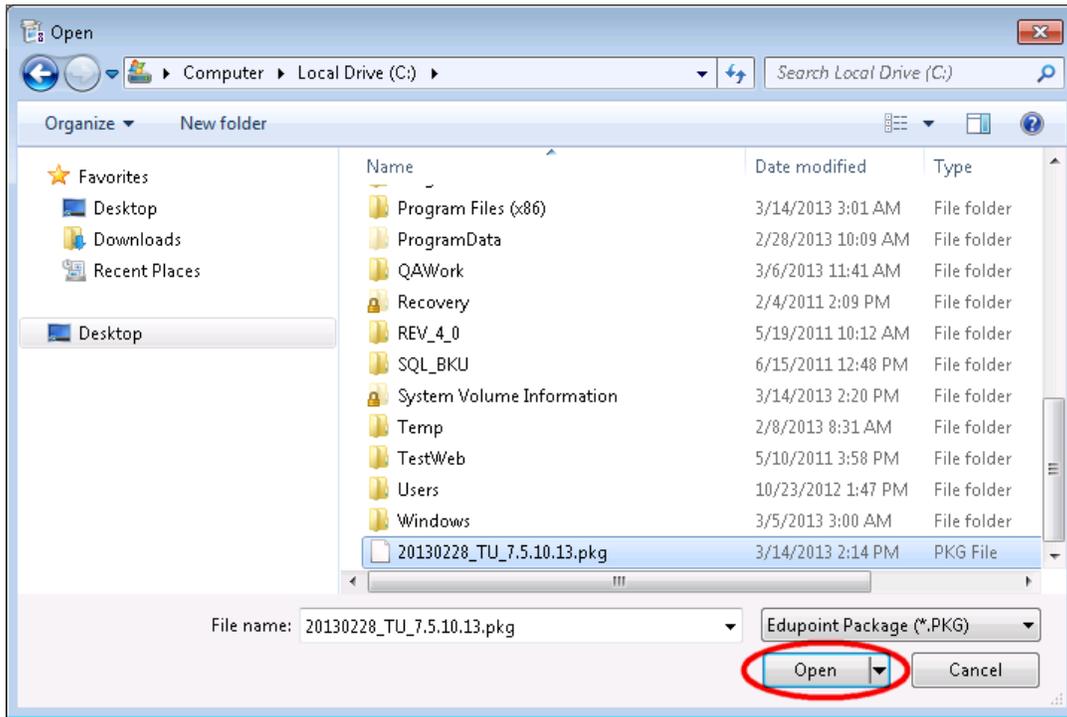


Figure 5.20 – Files Selected For Deployment

9. Select which servers to patch by clicking on the **checkbox** in front of each server. To check or uncheck all servers, click the **Check All** or **Uncheck All** button.

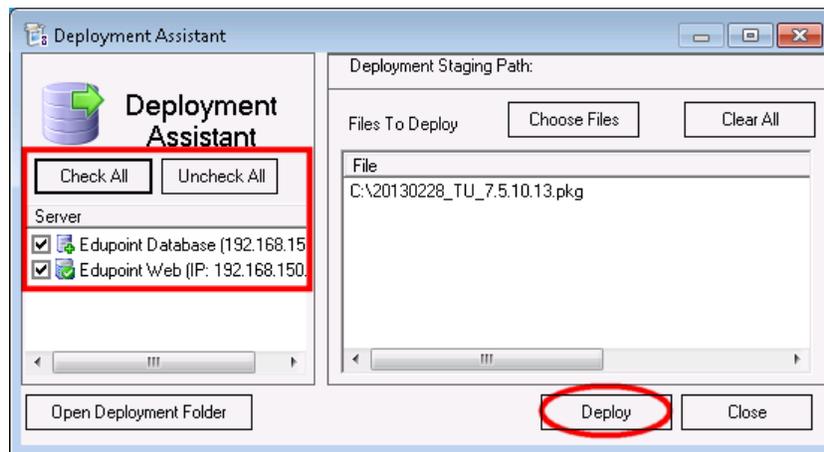


Figure 5.21 – Selecting the Servers

10. To deploy the file to the selected servers, click the **Deploy** button. To clear the list of files and select a file to deploy, click the **Clear All** button.
11. Once the Deploy button is clicked, the Deployment Status window pops-up to show the status of the deployment.

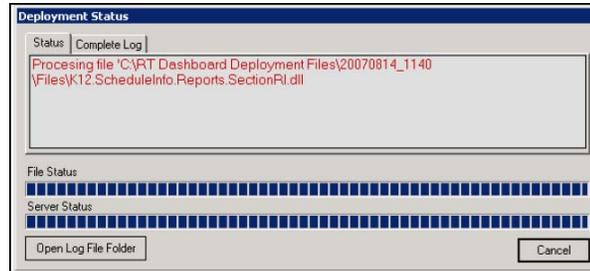


Figure 5.22 – Deployment Status

12. When the deployment is complete, a box pops-up asking to open the log file. Click **OK** to open the log file and review the files deployed.

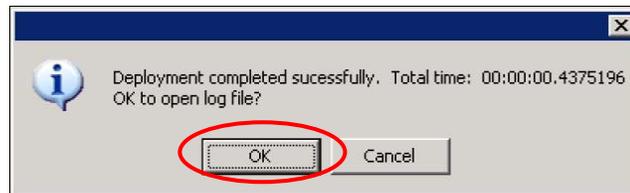


Figure 5.23 – Open Log File Confirmation

13. The log file opens in a text file format, listing the status of the deployment of every file on every selected server. The overall status of the deployment is stated at the bottom of the file. Close the file after reviewing it.

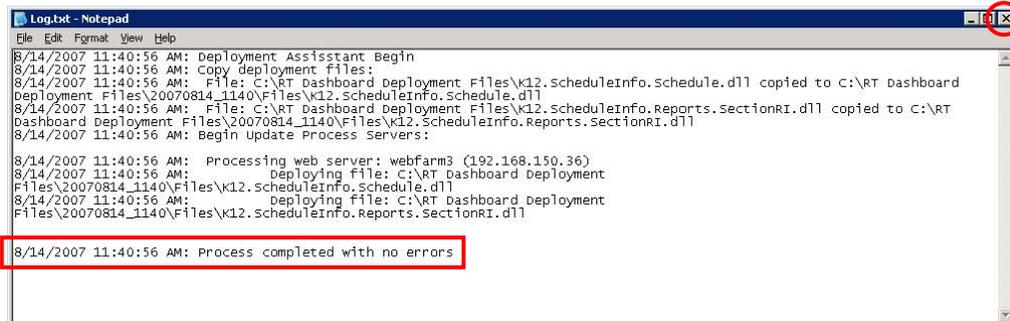


Figure 5.24 – Log File

14. To view the actual files deployed and the files that were replaced, click on the **Open Log File Folder** button.

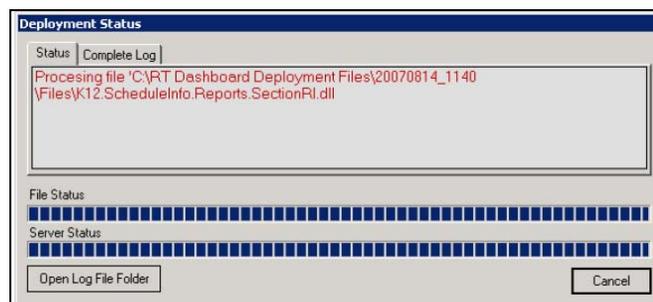


Figure 5.25 – Deployment Status

15. A new window opens, displaying the contents of the deployment folder. The deployment folder contains a subfolder labeled **Backups**, where copies of the files replaced are stored in separate subfolders labeled WS for web server files and PS for process server files. Another subfolder labeled **Files** stores copies of the files to be deployed. The **Log.txt** file is the log file displayed earlier.

 Backups	File Folder	8/14/2007 11:40 AM	
 Files	File Folder	8/14/2007 11:40 AM	
 Log.txt	1 KB Text Document	8/14/2007 11:40 AM	A

Figure 5.26 – Deployment Folder



Note – This is the same folder that is displayed when clicking the Open Deployment Folder button from the main Deployment Assistant window. By default, the deployment folder is C:\Program Files\Edupoint\RT Dashboard\Deployments. The deployment folder location can be changed in the Dashboard Options as explained in the Other Dashboard Options section in this chapter.

16. **Close** the folder, and then close the Deployment Status window by clicking the **Close** button. Then click the **Close** button again to close the Deployment Assistant.



Tip: The log files and the files deployed can also be accessed through the Update screen in Synergy. (Synergy SIS > System > Setup > Update) The Files tab displays a file by file breakdown of the installation.

The Show Detail feature displays additional information on the individual installation file, including when and where it was installed and any errors that occurred.

The deployment assistant can patch web, database or process servers. However, there may be a patch available for one of the other Synergy SIS software programs such as the Photo Attach software or the Scanning software. These patches will be located in the same location as the pkg file.

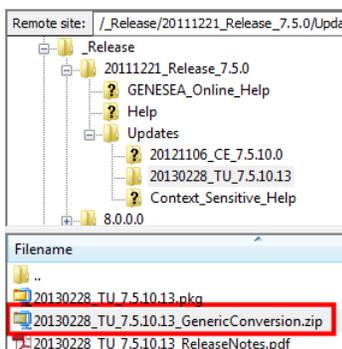


Figure 5.27 – Updates Patch Folder

The other applications are generally installed in the C:\Program Files\Edupoint folder. Go to the folder for the application and remove the files that will be replaced to a backup folder.

Then extract the files from the ZIP file located in the patch folder, and place them in the application folder.

SETTING DASHBOARD OPTIONS

To set the dashboard options:

1. Click on the **File** menu and select **Dashboard Options**.

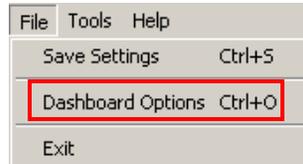


Figure 5.28 – File Menu

2. The RT Dashboard Options dialog box pops-up. To show larger icons in the dashboard tree, check the box titled **Show Large Icons in Tree**.

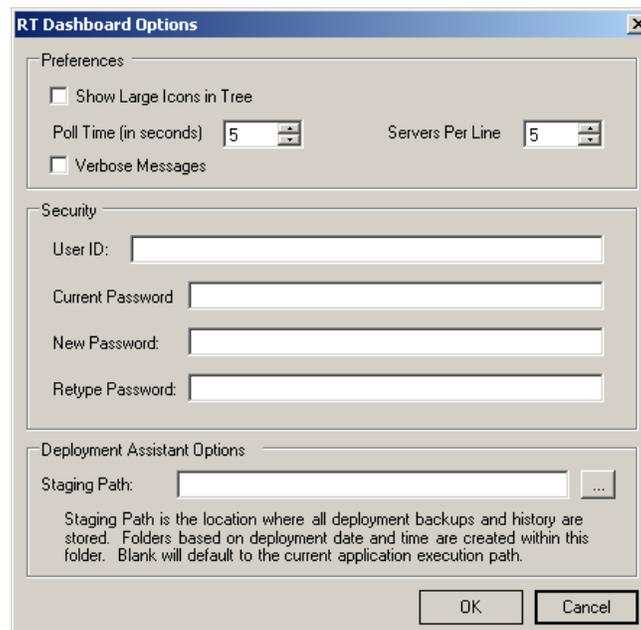


Figure 5.29 – RT Dashboard Options

3. By default, the dashboard checks the servers for status every 5 seconds. To modify the time in between these checked, change the **Poll Time**.
4. By default, 5 server boxes are displayed on each row of the dashboard display. To change the number of server boxes displayed, modify the **Servers Per Line** setting. Setting it to 1 server per line can be helpful, as then the other details of the server can be seen.



Figure 5.30 – 5 Servers Per Line

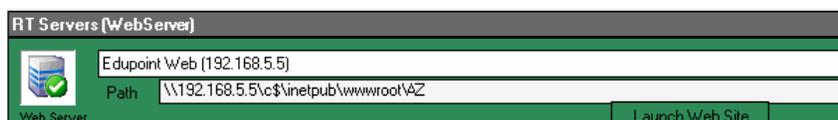


Figure 5.31 – One Server Per Line

5. To add more detail to the error messages, check the **Verbose Messages** box.
6. To lock the dashboard and require a username and password to start it, enter the **Username** and **New/Retype Password** to be used in the Security section. The first time this information is entered, leave the **Current Password** blank. To change the password in the future, the Current Password will be required.
7. To change the location of the deployment folder used for applying patches, enter the new location in the **Staging Path** box or click the  button to browse for the folder.



Caution: Every time a new server is added or deleted, or a new group is added or deleted, or the dashboard options are changed, be sure to save the new dashboard settings. To save the settings, click on the **File** menu and select **Save Settings**.

To view the version of the dashboard:

1. Click on the **Help** menu and choose **About...**



Figure 5.32 – Help Menu

2. The About RT Dashboard windows pops-up. It displays the **Version** number of the dashboard software, and the **Date** on which it was compiled. It also shows the **IP** address of the computer on which the dashboard software is installed.

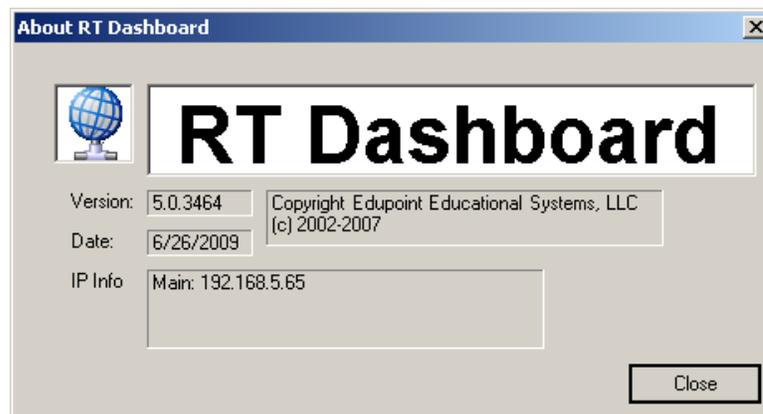


Figure 5.33 – About RT Dashboard

3. Click the **Close** button to close the window.

MANAGING SERVERS THROUGH THE DASHBOARD

Once the servers have been added to the dashboard, several management options are available.

To see the properties of a server:

1. **Right-click** on the server to inspect it. From the drop-down menu, select **Properties**. Note that database servers do not have the Properties option.

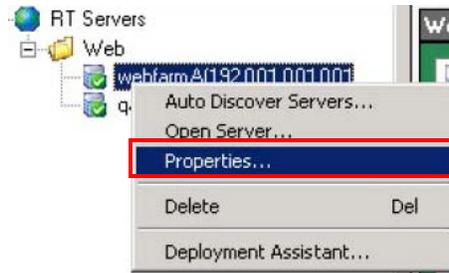
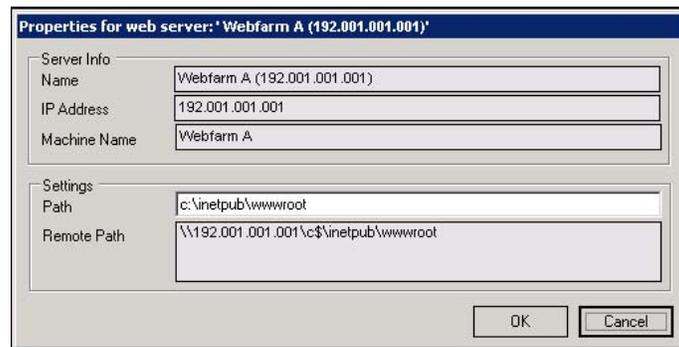


Figure 5.34 – Server Right-Click Menu

2. The Properties dialog box shows the server **Name** (as entered for the dashboard), the **IP Address**, and the name of the computer on which it is installed (the **Machine Name**).



3. The **Path** shows the location of the server software from the server itself, and the **Remote Path** shows the path used by other computers. For web servers, this is the folder where the web software is installed, and for process servers it shows the location of the software in the Program Files folder. To edit the location of the software, change the Path and click the **OK** button. If the path is removed, the Properties and Open Server will no longer be available until the server is deleted and re-added. To close the box without changes, click the **Cancel** button.

To view the program files for either a web server or process server:

1. **Right-click** the server to inspect. From the drop-down menu, select **Open Folder**. Note that database servers do not have the Open Folder option.

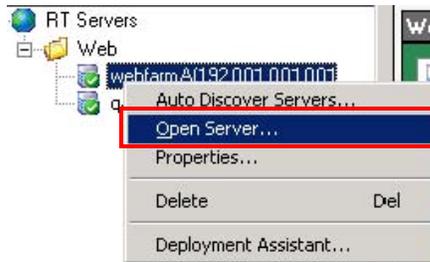


Figure 5.35 – Server Right-Click Menu

2. Windows Explorer opens the folder where the server files are located.

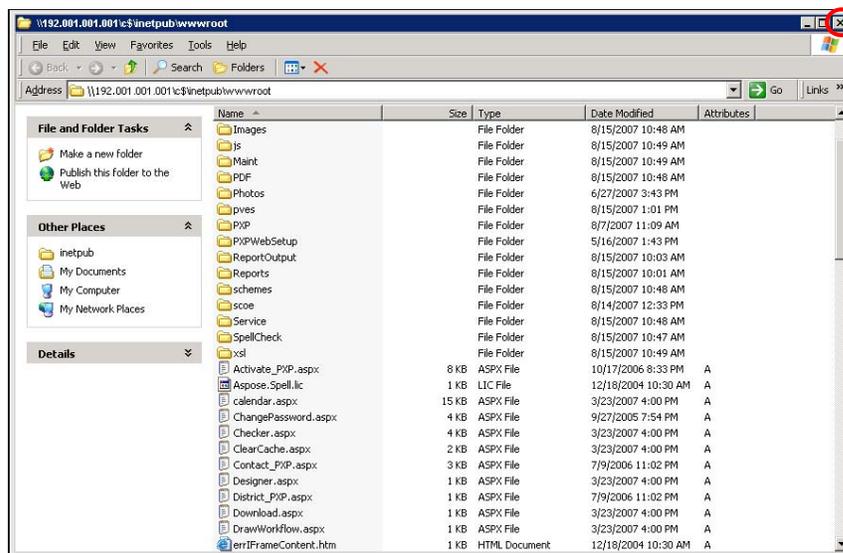


Figure 5.36 – Server Folder

3. To close the folder, click the **X** in the upper right-hand corner of the window.

To view and identify each server and its current status:

1. Each type of server is assigned a different icon.



Figure 5.37 – Web Server



Figure 5.38 - Process Server



Figure 5.39 – Database Server

2. The color of each server box indicates the current status of the server. **Green** indicates the server is up and running.

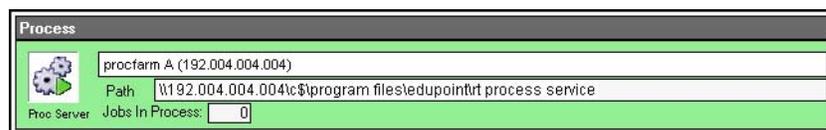


Figure 5.40 – Server Up and Running

3. **Yellow** indicates the server is paused.

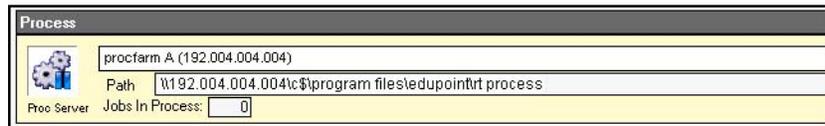


Figure 5.41 – Server Paused

4. **Red** indicates the server is stopped or otherwise unreachable.



Figure 5.42 – Server Stopped or Down

To manage the process servers:

1. To manage groups of process servers, click on either the root of the dashboard tree to control all process servers or click on a group to control only a certain group of process servers.
2. **Right-click** on the selected group, and choose one of the following options:

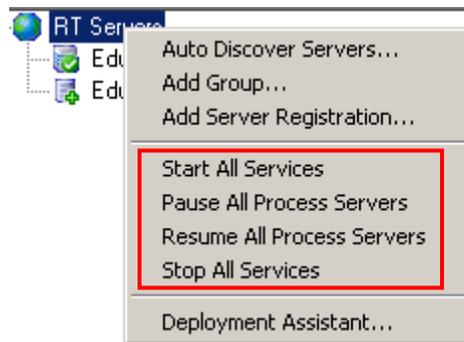


Figure 5.43 – Group Menu

- **Start All Services** – start all stopped process servers
 - **Pause All Process Servers** – pause all process servers
 - **Resume All Process Servers** – restart all paused process servers
 - **Stop All Services** – stop all process servers
3. To manage an individual process server, **right-click** on the process server.



Figure 5.44 – Process Server Menu

4. Choose to **Stop Process Server** or **Pause Process Server** when the server is running. If the server is paused, the option will be to **Resume Process Server** or **Stop Process Server**. If the server is stopped, the option will be to **Start Process Server** or **Pause Process Server**.
5. To confirm any selected action, click the **OK** button.

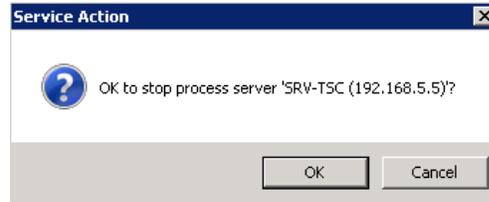


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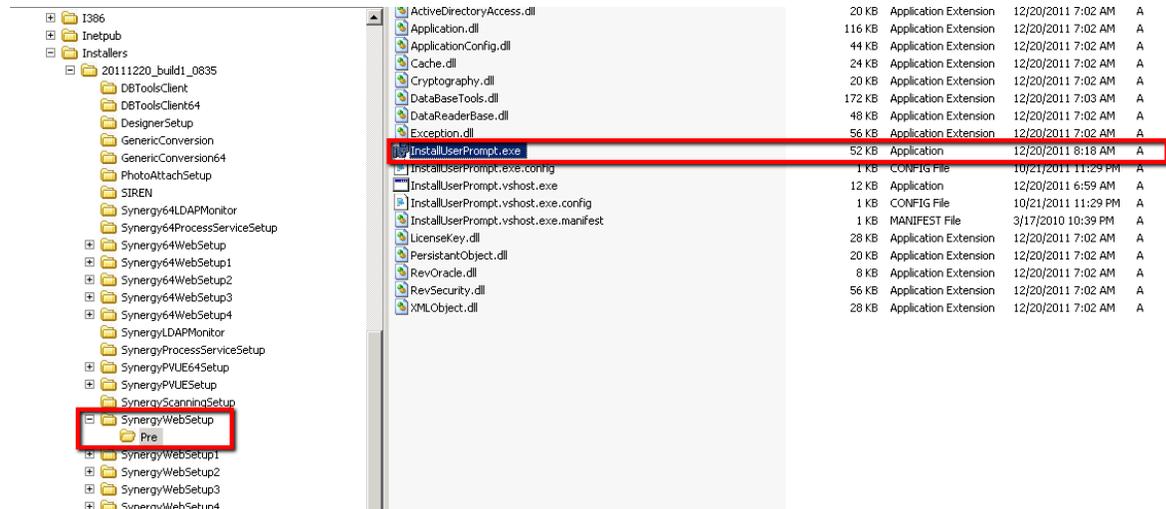


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