SAVANCE EIOBOARD

EIOBoard v10 and Later Automated Installer

New Installations/Installations to New Servers

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Overview

EIOBoard's automated installer takes all the guesswork out of EIOBoard On-Prem Server installations. This installer takes care of the download, installation, and configuration of SQL, SQL Server Management Studio, Internet Information Services (IIS) and all prerequisites with minimal user interaction using a new Advanced Installer Wizard.

The Purpose of This Guide

The purpose of this guide is to walk users through all the steps and possibilities for installing our application's server components to servers which do not currently host EIOBoard Server. The guide explains how to use EIOBoard to install a brand new SQL instance or use an existing one as well as how to create a new database or restore from backup. Determining the optimal Internet Information Services settings desired for use during installation is also covered.

Downloading and Running the On-Prem Installer

The first step to installing EIOBoard On-Prem to your physical or virtual server is to download the Intranet Installer for the version you wish to install. The latest general release is here. Be sure if following these instructions the version number stated on the download page is 10.0.47 or higher. Download the .exe file to the target machine, right-click on it and choose "Run As Administrator." Many of the automated actions of the new installer require Administrator-level permissions to perform, however. So to be on the safe side always right-click on the installer's .exe file and choose "Run As Administrator" in order to run it with these permissions explicitly.
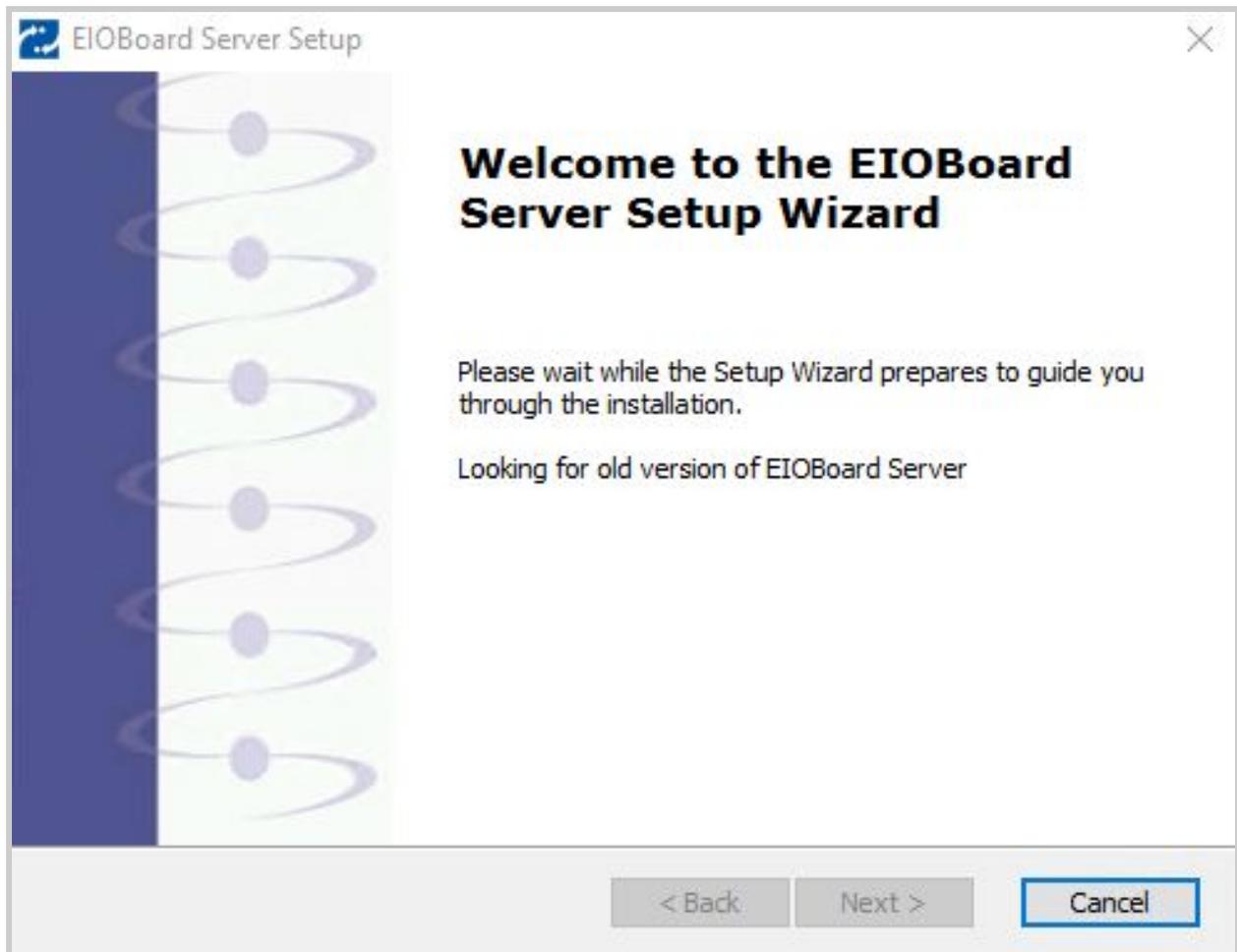
When the installer is run this will be the first window that appears. If upon running the installer something other than the EIOBoard Server Setup Wizard starts, double-check to make sure the Intranet Installer has been downloaded and run and one of the EIOBoard client application installers has not been run instead. Part of the process at this point is to determine if an existing install of EIOBoard Server is currently present on the machine.

In the case of an upgrade, one will likely be found. Upgrades always require planning and an understanding of the current configuration. If you have any questions, contact support before beginning an upgrade.
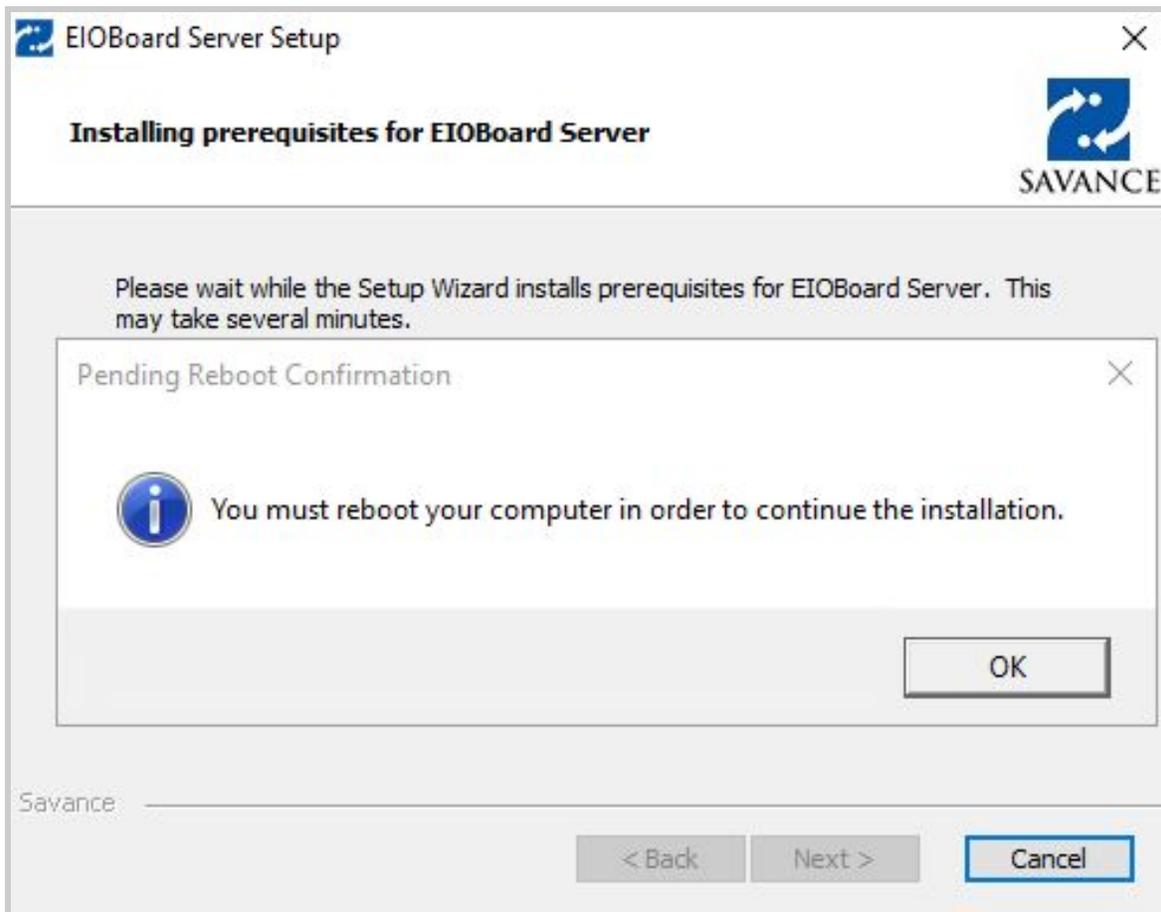
When this dialog box appears initial setup has begun. If the server cannot be
restarted at this time do not click Ok. This initial restart is triggered by the installer
so that any pending or incomplete Windows Updates do not interfere with
installation. In addition to this restart, some of the prerequisites that must be
installed may require a restart to complete. So there may be subsequent restarts
during the installation process as well. Before clicking Ok be sure all work that
needs to be saved is saved. Close any applications that will be damaged by an
immediate reboot. When Ok is clicked the Server will be restarted immediately
without any further warning or action on the part of the user.
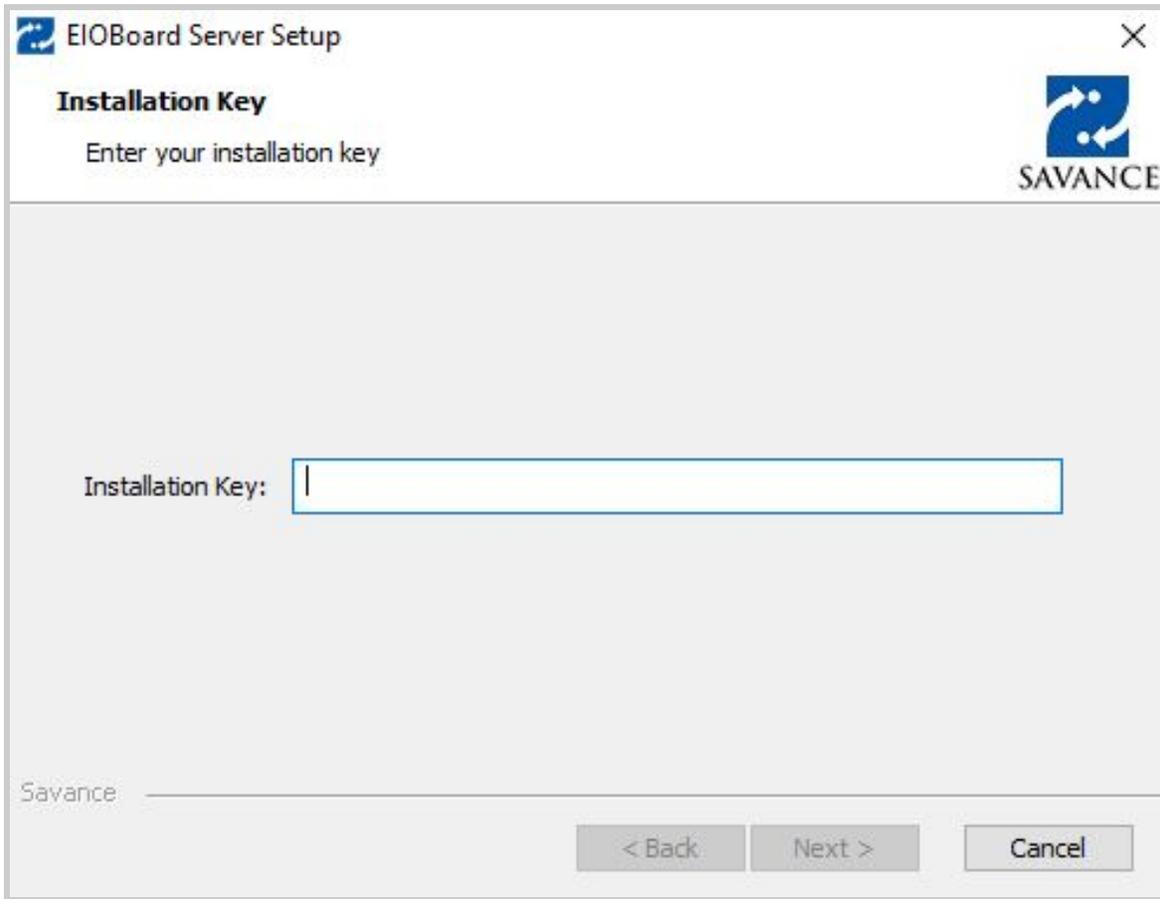
Installation Keys are typically 16 digits and are provided to customers in the new account email received after first opening the account. If an install key is not available please contact support to obtain it by emailing support@eioboard.com.

SQL Configuration
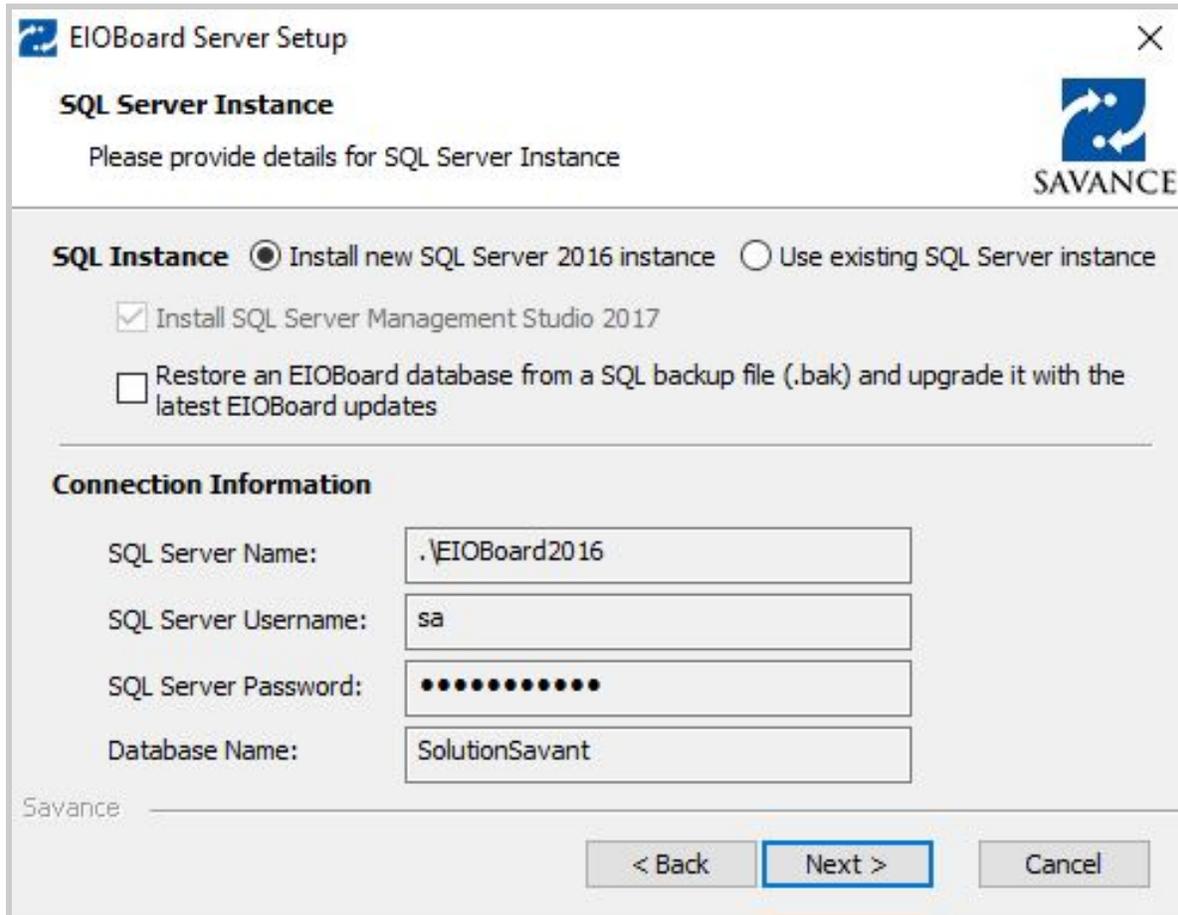
After entering the install key the next screen displayed is used to input SQL Server Instance Settings. The new installer automates this process greatly. If there is no existing SQL server instance for use with EIOBoard choose "Install new SQL Server 2016 instance". This will populate the Server Name, Username, Password and Database Name fields with default information. This information can be changed if preferred.

Although not required it is recommended that SQL Server Management Studio be downloaded and installed. But, this can add between 20-45 minutes to install SQL Server Management Studio. Download and install of SSMS can be done at a later time if desired.

In that case, it can be downloaded from Microsoft. To download and install it now check the checkbox labeled Install SQL Server Management Studio 2017. If SSMS 2017 is already installed the option will be greyed out as shown above.

If an existing SQL instance will be used, choose "Use existing SQL Server instance". In this case, the connection information and Database name will need to be filled out and a button to test the connection before clicking next will be available.

If a migration is being performed check the checkbox to Restore an EIOBoard database from a SQL backup file. When checked a file Browse dialog will open to allow selection of the backup file to be used. The backup will be restored and upgraded to the installer's version during the install process. The backup database' version must be the same or earlier than the installer in use.

IIS Configuration
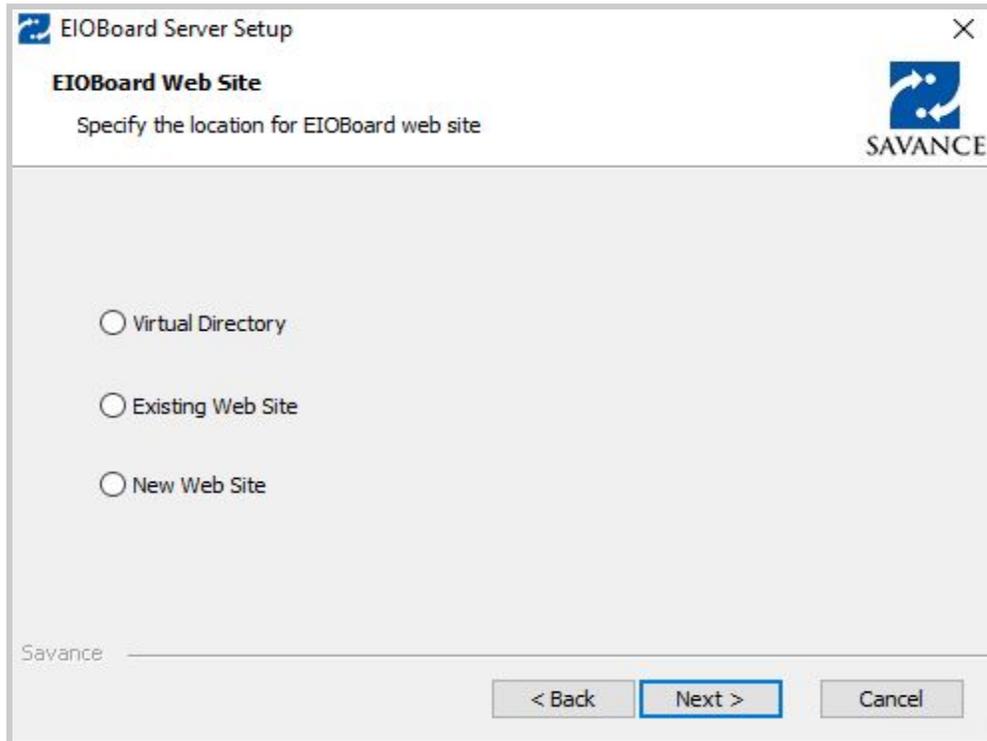
EIOBoard uses a Microsoft Internet Information Services website to provide database data to client applications. As part of the installer that website will be created. Whether the website should be installed as a Virtual Directory, Existing Website or New Website depends on the connection address desired.

There are very few instances wherein "Existing Website" will be selected here. This choice will install the EIOBoard website into an existing site, overwriting it. This is recommended only in very special cases and should be avoided unless demanded by mitigating circumstances.

To know which of the other options should be selected it is important to understand the difference between the two.

Virtual Directory
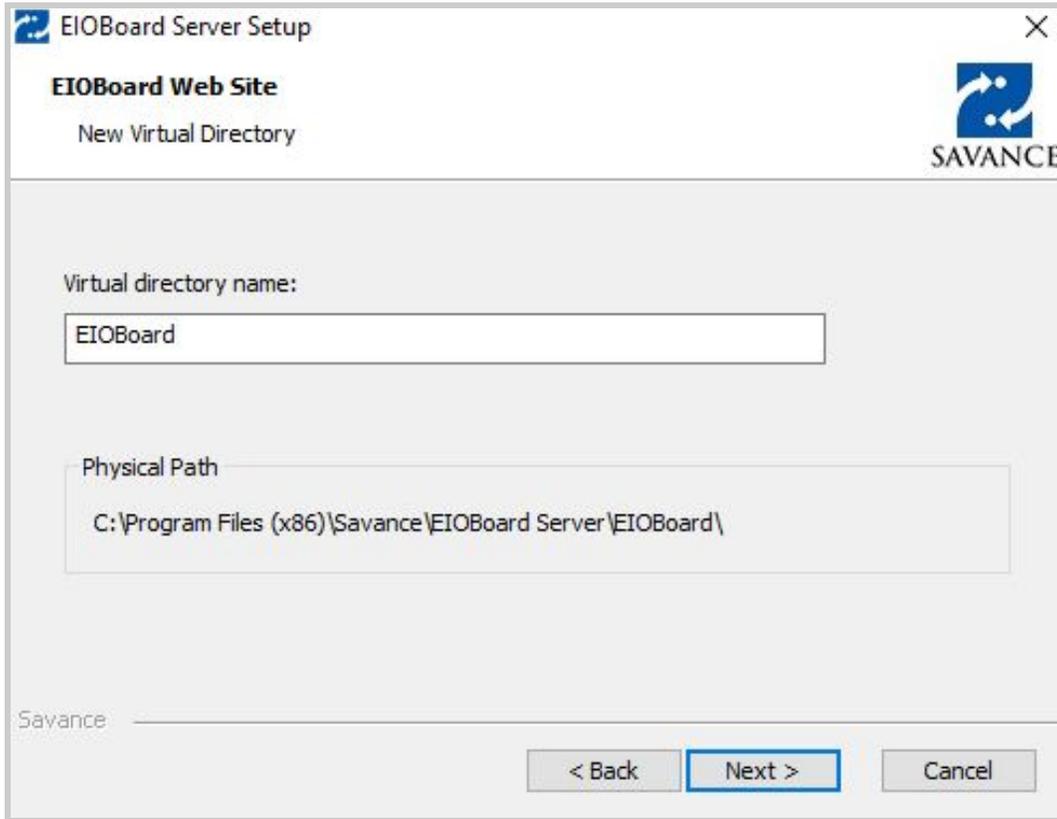
A Virtual Directory is similar to a folder within a folder in Windows. A virtual directory will have a connection address like http://ipaddress/VirtualDirectoryName or http://ServerName/VirtualDirectoryName. When this option is chosen the New Virtual Directory Window will be next. Enter a name or use the default EIOBoard. The default is recommended.
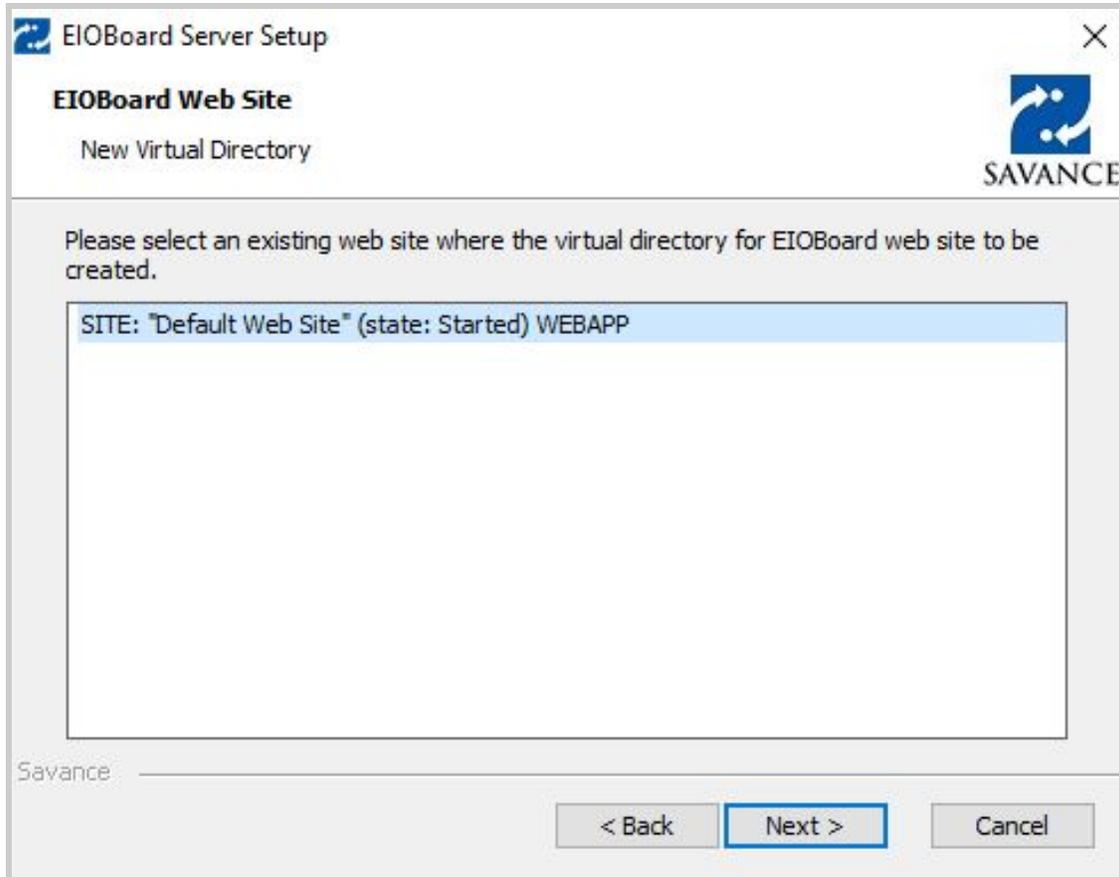
The Virtual Directory for EIOBoard will be installed "under" another existing site in IIS. In most cases, this will be the "Default Web Site" provided by IIS but it could be another existing site as well. Virtual Directories inherit the port numbers, bindings, SSL certificates and most settings of their "parent" directories.

New Web Site
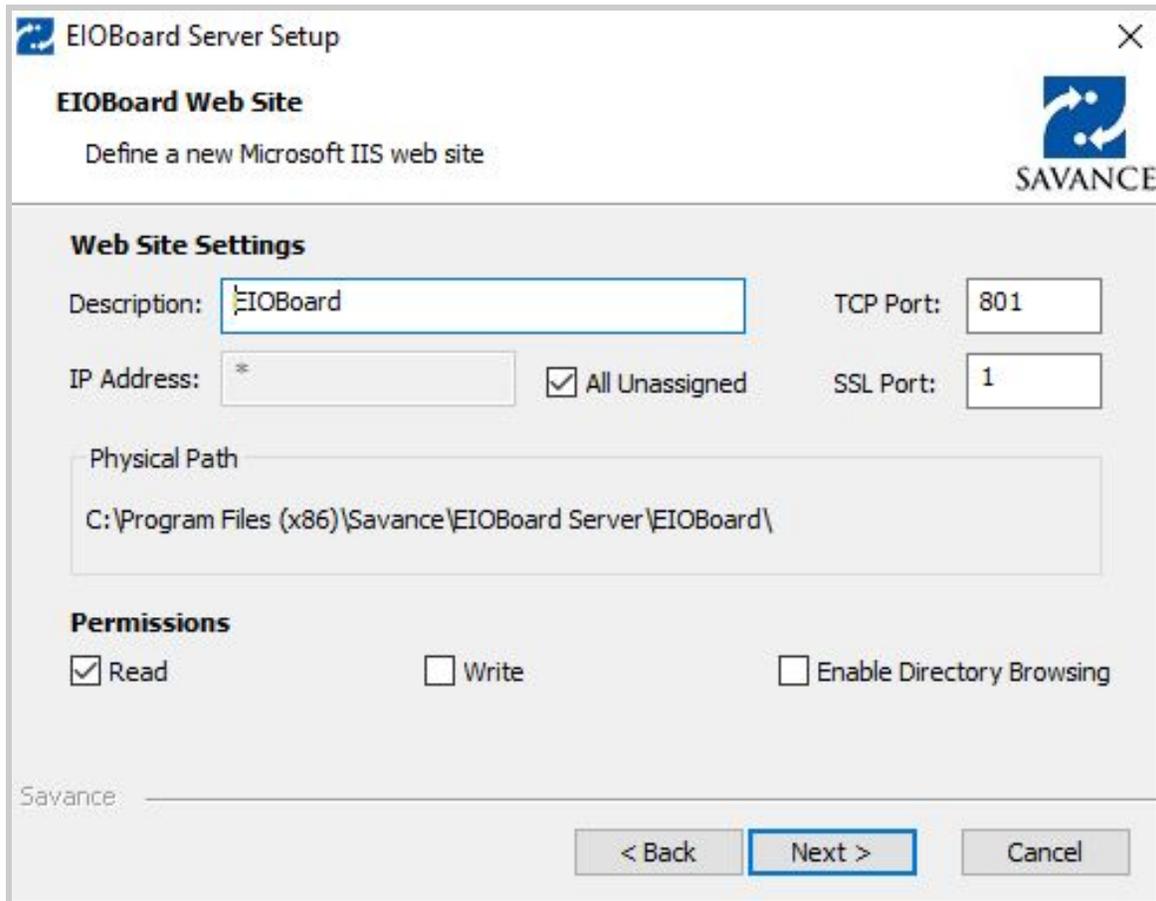
A New Web Site will be "standalone". In other words, it will be its own parent directory not tied to any other site. It will be assigned its own port number. This creates a difference in the connection address. A standalone site will have a connection address like http://ipaddress:PortNumber or http://ServerName:PortNumber. If the New Web Site is on Port 80 (or 443 if https) then the port number will not be required. However, to install a New Web Site to port 80 or 443 and have it function properly there must be no other site bound to the port in IIS. Typically, if a New Web Site on port 80 is desired it is best to delete the Default Website before beginning installation, assuming the Default Web Site is not in use by any other applications. Unless there is an SSL certificate for use with the New Site, whether a site-specific or wild card certificate, there is no need to configure the SSL port. It can remain associated with port 1 or even 0.

If SSL is desired for security consult this article-

how-to-add-an-ssl-certificate-on-eioboard-on-premise-hosted-servers

Ready To Install
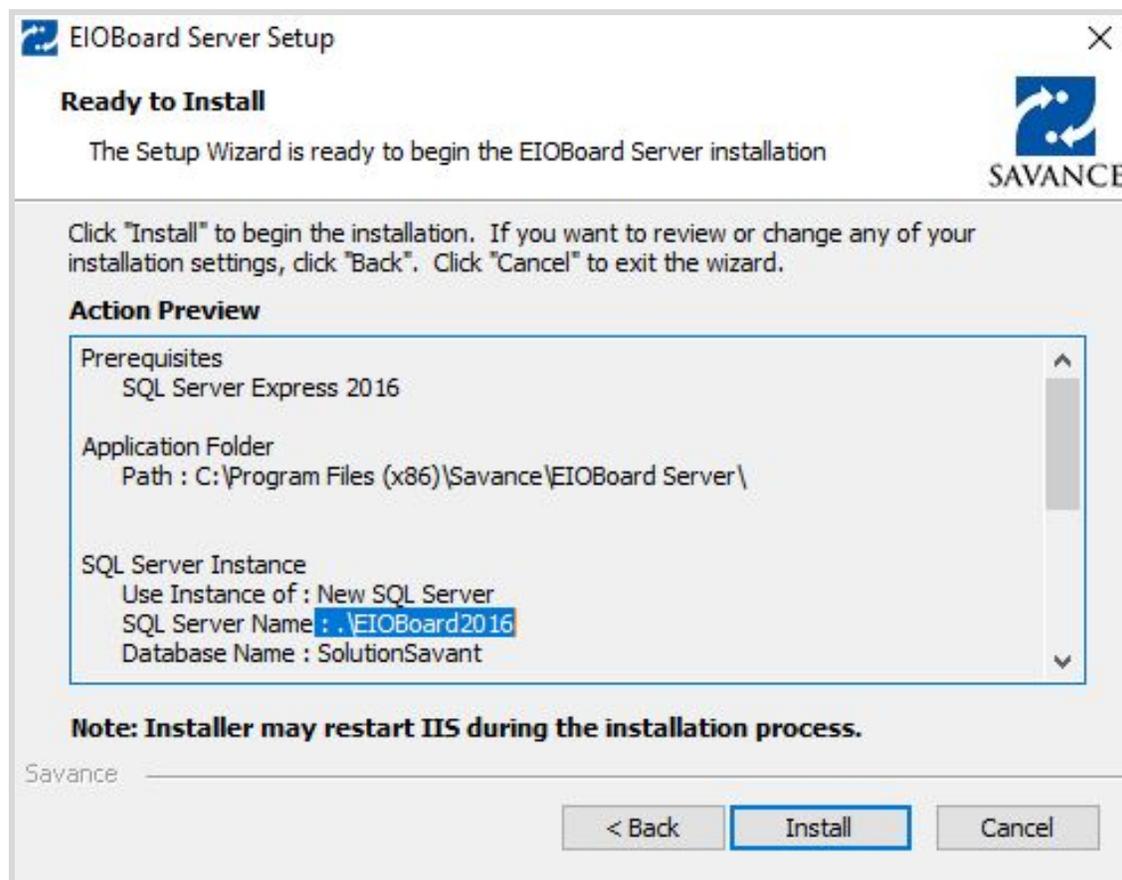
After configuration of the settings for IIS, the last dialog before the install will come up. Look over the Action Preview dialog box to review the setup actions that will be taken before proceeding.

Install Complete!
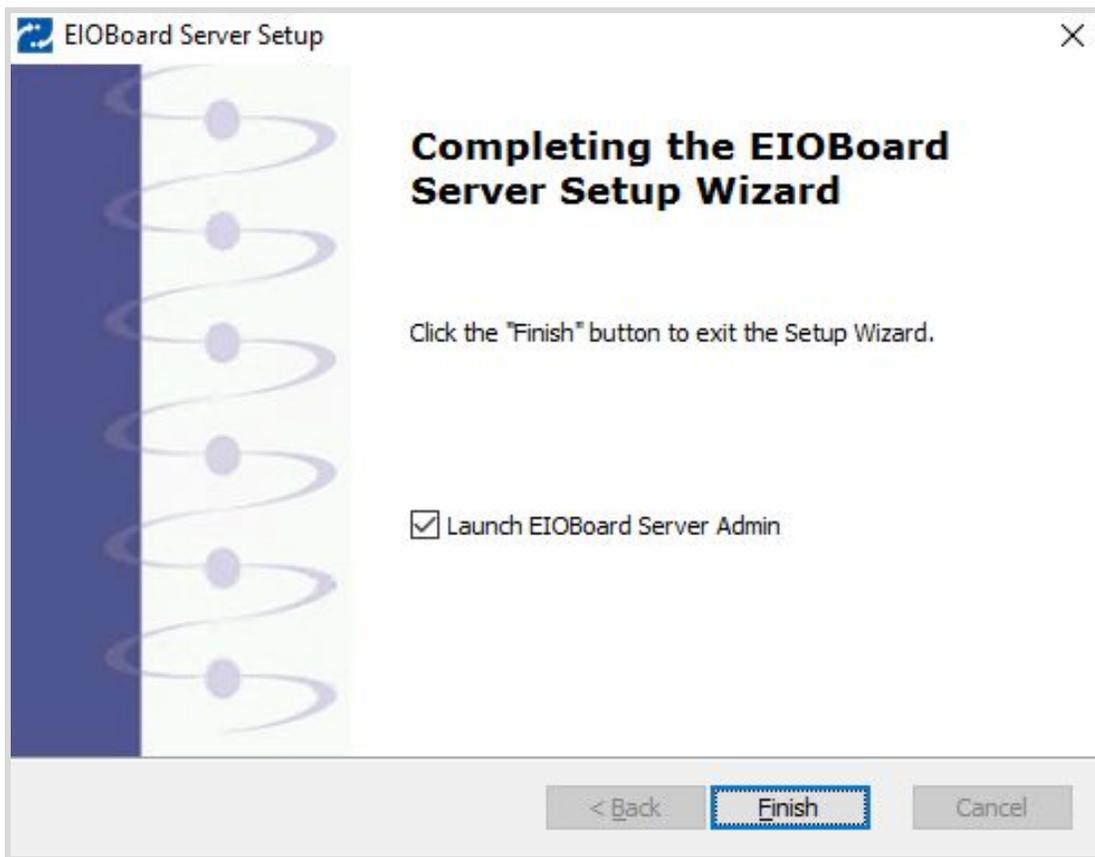
If the Installation is Error Free the Setup Wizard will display a Window with notification the install has completed successfully. Click Finish and the EIOBoard Server Settings Window will launch. Now it's time to test the connection.

Test the Connection
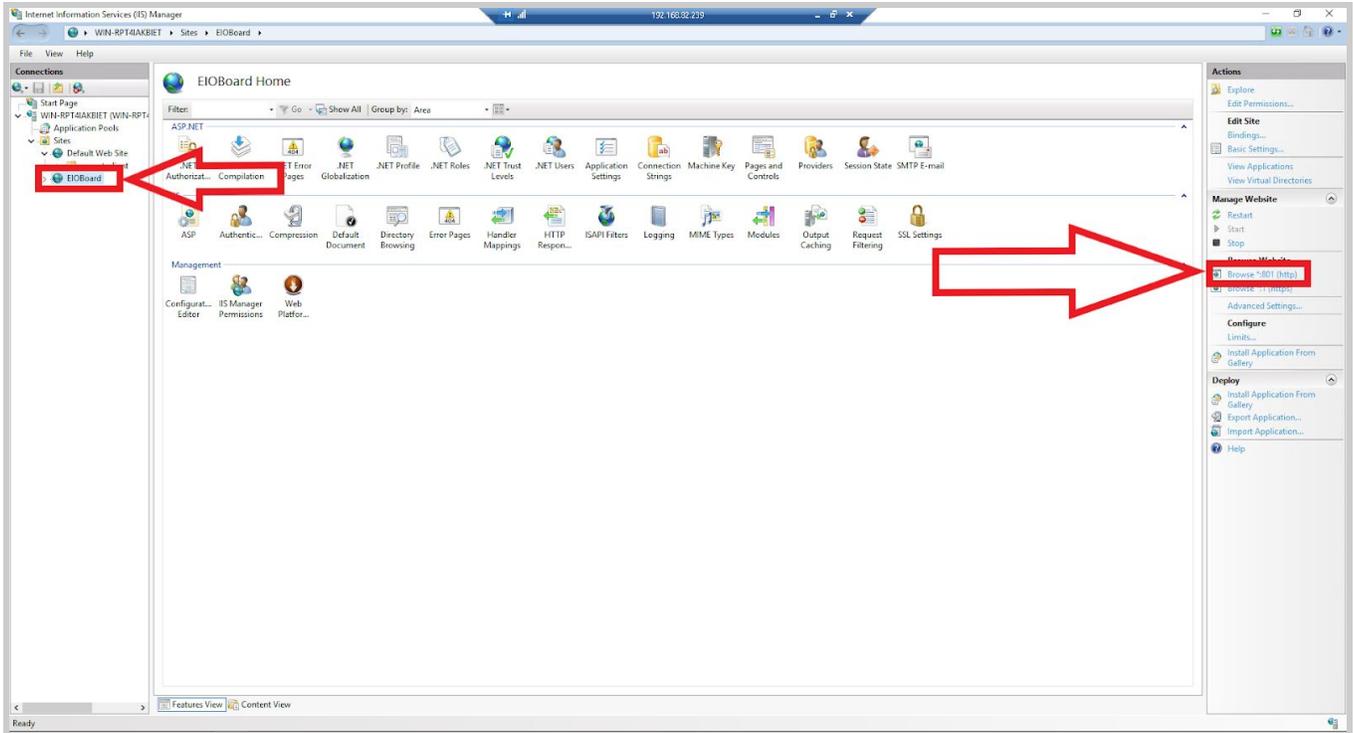
To be sure the install has completed successfully open Internet Information Services by going to Start Menu-->Windows Administrative Tools-->Internet Information Services v4 (not v6). When IIS opens, on the left hand side, expand Sites. If a New Web Site was installed, it should be immediately visible in the list of sites. If a Virtual Directory was used, expand the site chosen as the parent directory and the EIOBoard Virtual Directory becomes visible. Click on the EIOBoard site or directory on the left and then click Browse on the right.
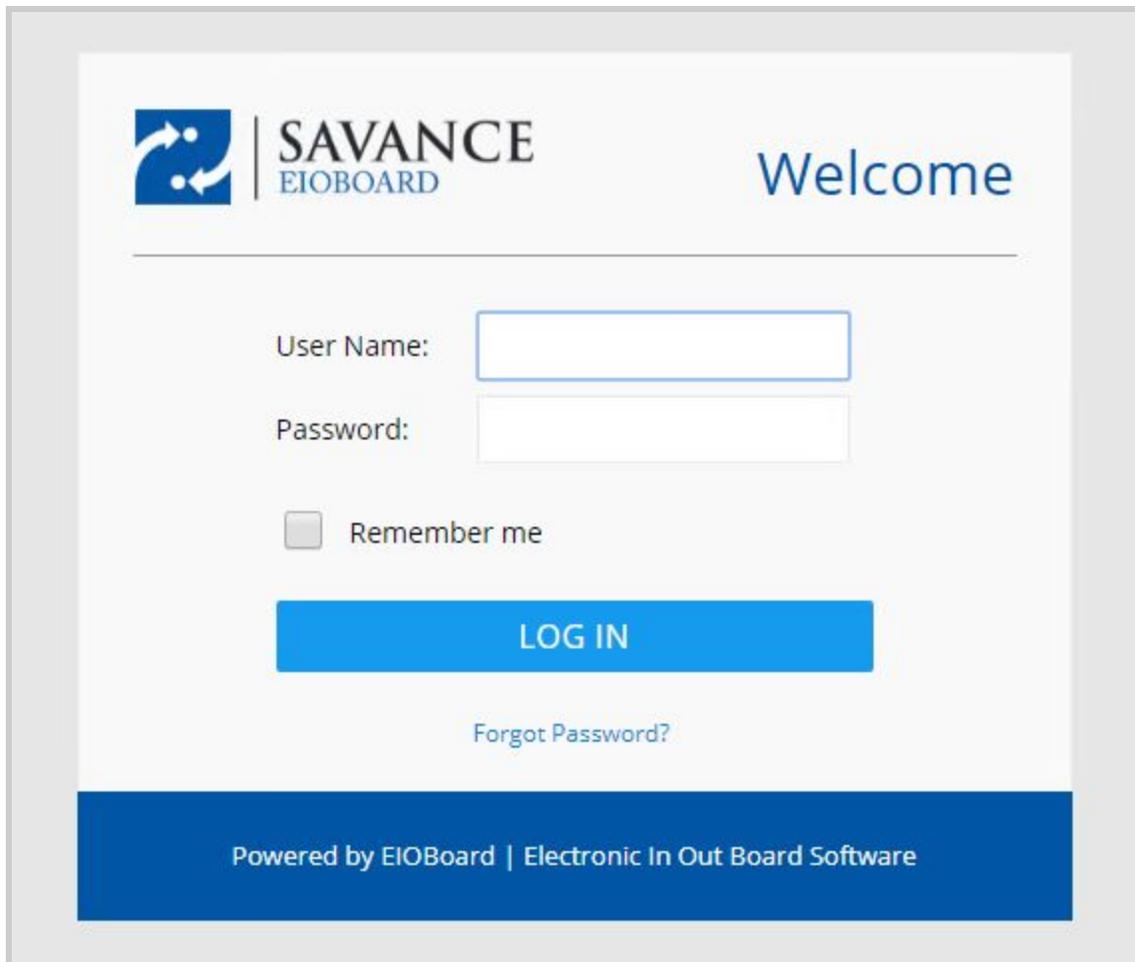
If the login page takes a minute or two to load do not be alarmed. This is normal. All the files and directories needed to run the site are being created and deployed for the first time. After a minute or so, the login page should appear. Attempt login with the default Master Admin username/password credentials supplied in the new account email. Contact support@eioboard.com if these credentials are unavailable or lost.

Test Login Successful!
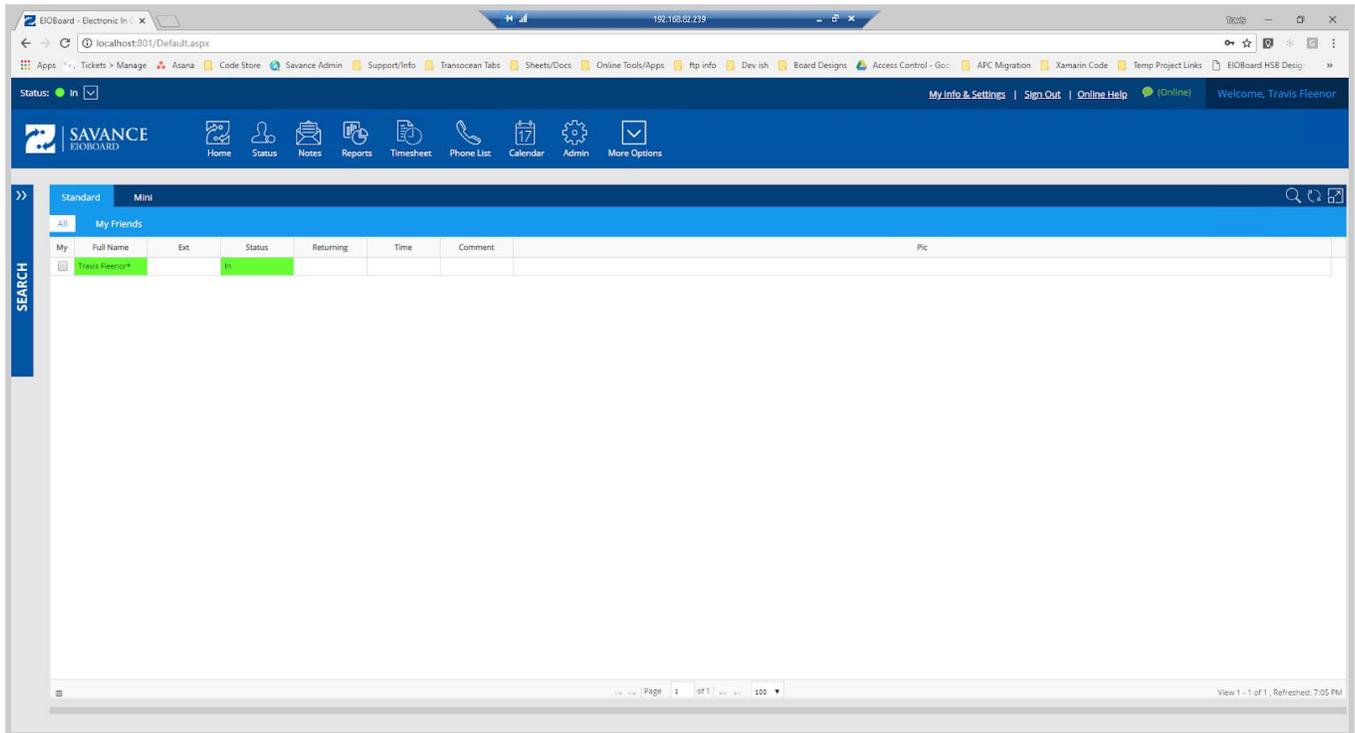
If login is successful the web application's status board will be displayed. For brand new accounts there will only be one user displayed as shown above. If a database was restored during installation the users and settings stored therein should already be displayed and implemented.

Congratulations!

Install is complete and the solution is functional. Users can now be added to the database. The solution is ready for more in-depth configuration. Any desired client applications included in licensing for the account may be installed and connected to the EIOBoard website.