



12d Synergy Server Installation Guide

Version 3.0

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12d[®] Solutions



12d Synergy Server Installation Manual

V3.0 April 2017

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No warranty of fitness for a particular purpose is offered.

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1.0 INSTALLING THE 12D SYNERGY SERVER

If you have already installed the 12d Synergy server, you do not need to complete a full install. Please see the section entitled Upgrading the 12d Synergy Server.

1.1 Service account and password

A service account is the user under which the 12d Synergy server is run. It should have administrative rights on the computer. A service account must have the Log on as a Service right, but this can be applied after installation, and in some cases, can be applied automatically.

1.2 Data directory

You will be prompted for a location to store data during the installation.

This storage area could become quite large, depending on your usage and needs. It can be migrated at a later date if need be. Note that if you should not use a mapped network drive unless you can guarantee the drive letter will be available when the 12d Synergy Server service starts.

1.3 Required Components

You will need to know if you have a SQL Server database installed and the details to connect to it. If you do not have one installed, 12d Synergy can install one for you.

If you do have a SQL Server you wish to use, you will need to know:

1. The server address and instance name
2. The name of the database

1.4 Authorization Mode

Do you want Single Sign On, so 12d Synergy validates users against their Windows accounts, or would you like custom user names? If you want custom user names, you must also provide a Certificate for SSL. Using Windows Authentication, a certificate is provided by Microsoft.

1.5 Active Directory

You will need to know if you are using Active Directory and if you are using it for managing groups. If you are, you will need to know the Active Directory server name.

1.6 Mail Server

The 12d Synergy Server can send mail to alert users about specific actions. You will need to know:

- The address of the SMTP Mail Server
- Any optional authentication details for communicating with the server

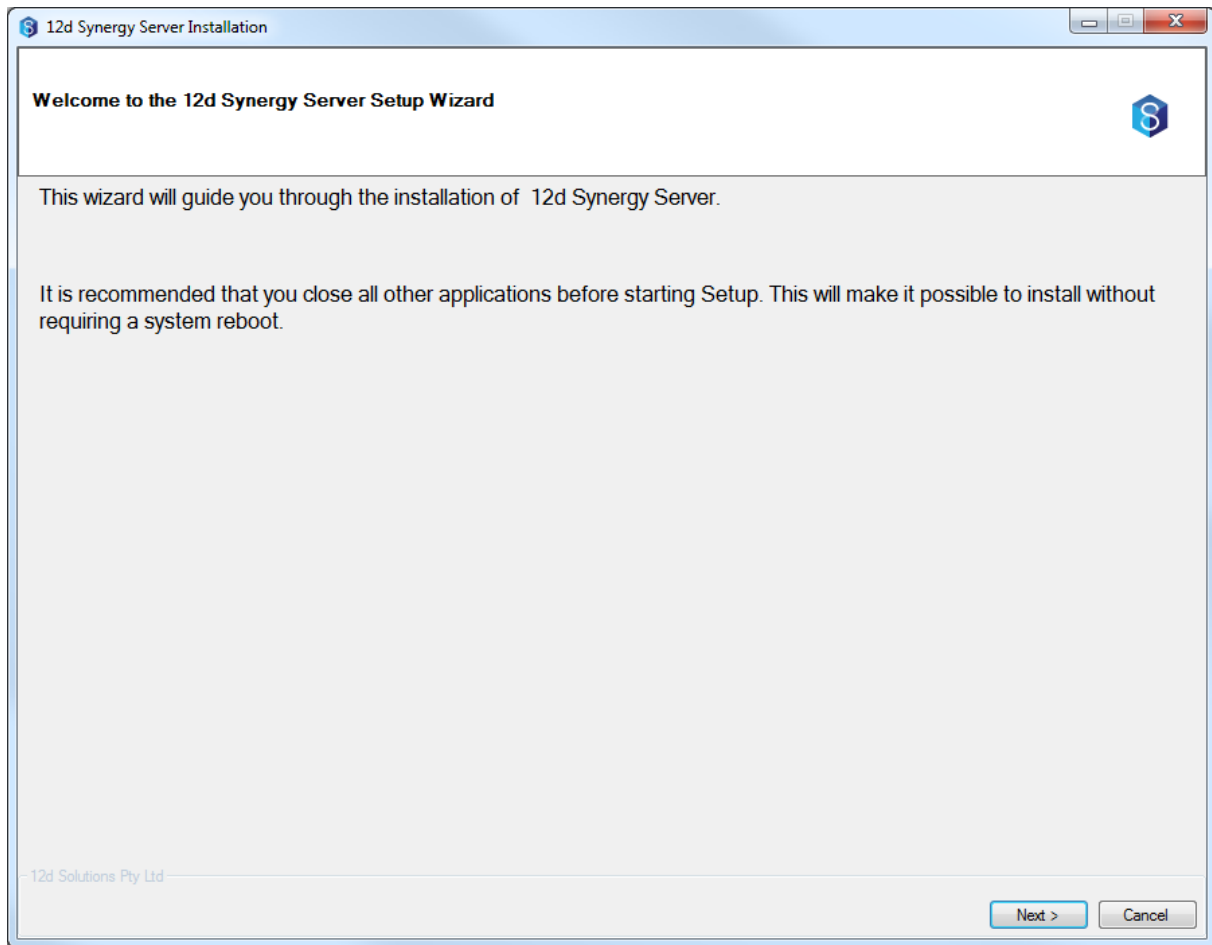
2.0 PERFORMING THE INSTALLATION

The installation is started by running the 12dSynergy_Server_x86.exe.

The installer will provide you with helpful hints to make the process simple.



2.1 Welcome to the 12d Synergy Server Installation



This is the welcome page. Click next to continue.



2.2 End User License Agreement

12d Synergy End User License Acceptance

Please read the terms and conditions of use for 12d Synergy. Installing this product is considered acceptance of this license.

This Service Level Agreement ("SLA") details the service commitment by 12d Solutions Pty Ltd ("12d") to the Customer which has licensed the use of the Document Management Product identified as 12d Synergy (the "Software").

The Software consists of software that resides on a server ("Server Software") and software that resides on the end-user's computer ("Client Software"). Unless stated specifically Software, Server Software, Client Software may be used interchangeably, and will be interpreted in the context in which it is used.

The Client Software is available on an annual subscription basis. This SLA applies only during the term of the subscription. The Customer's subscription start on the Activation Date and the expiry date is on the anniversary of the Activation Date.

The Server Software is available on an initial upfront fee with an obligatory annual maintenance contract.

The Software is provided on an "as is" bases. 12d does not warrant the Software will operate uninterrupted, error free, or completely secure as 12d does not control the flow of data or the performance of data over the Customer's computer network, which the Software is dependent upon.

1. Definitions

"Activation Date" means the date a License Key is registered for activation of Software.

"Business Day" means normal working day in the time zone where 12d is located, which is GMT+10 hours.

"Customer" means the party identified as the purchasing organization to this Agreement.

☐ I have read and accepted the terms of this Software License Agreement

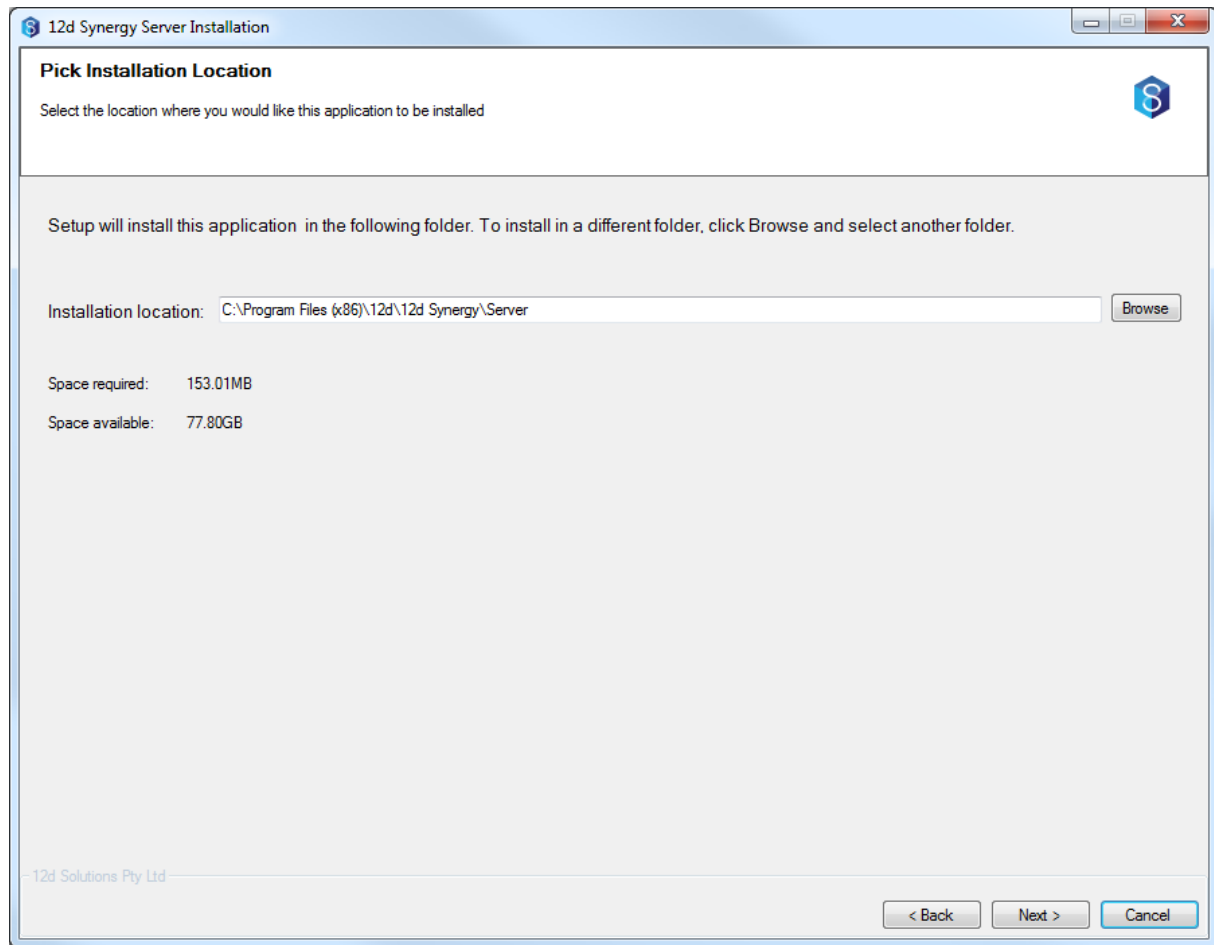
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Next > Cancel

To install 12d Synergy, you must accept the license agreement before clicking 'Next'



2.3 Pick Installation Location



Choose the installation location – it is recommended this is left as the default pre-defined setting.
Click next when you have selected the location to install to.



2.4 Configure the 12d Synergy Server – Port and Login Details

Configure the 12d Synergy Server

Configure the service account and port number under which this 12d Synergy server will run

Port: 1212

File transfer port: 1250

Service account: .richard

Service password:

Service Accounts

A service account is a special user account that allows 12d Synergy to run even when no one is logged in. This account should have the *Log On As a Service* right or 12d Synergy may not start.

The following fields are required:

Port number	The unique 4-6 digit number that 12d Synergy will use for remote communications. You can change this, but it's recommended that you leave it at 1212
File transfer port	The unique 4-6 digit number that 12d Synergy will use for file transfers. You can change this, but it's recommended that you leave it at 1250
Service account	The login name of the account. If you are on a domain, enter it in the format: DOMAIN\UserName e.g. YourCompany\ServiceAccount If you are not on a domain, enter it in the format: .\ServiceAccount

< Back Next > Cancel

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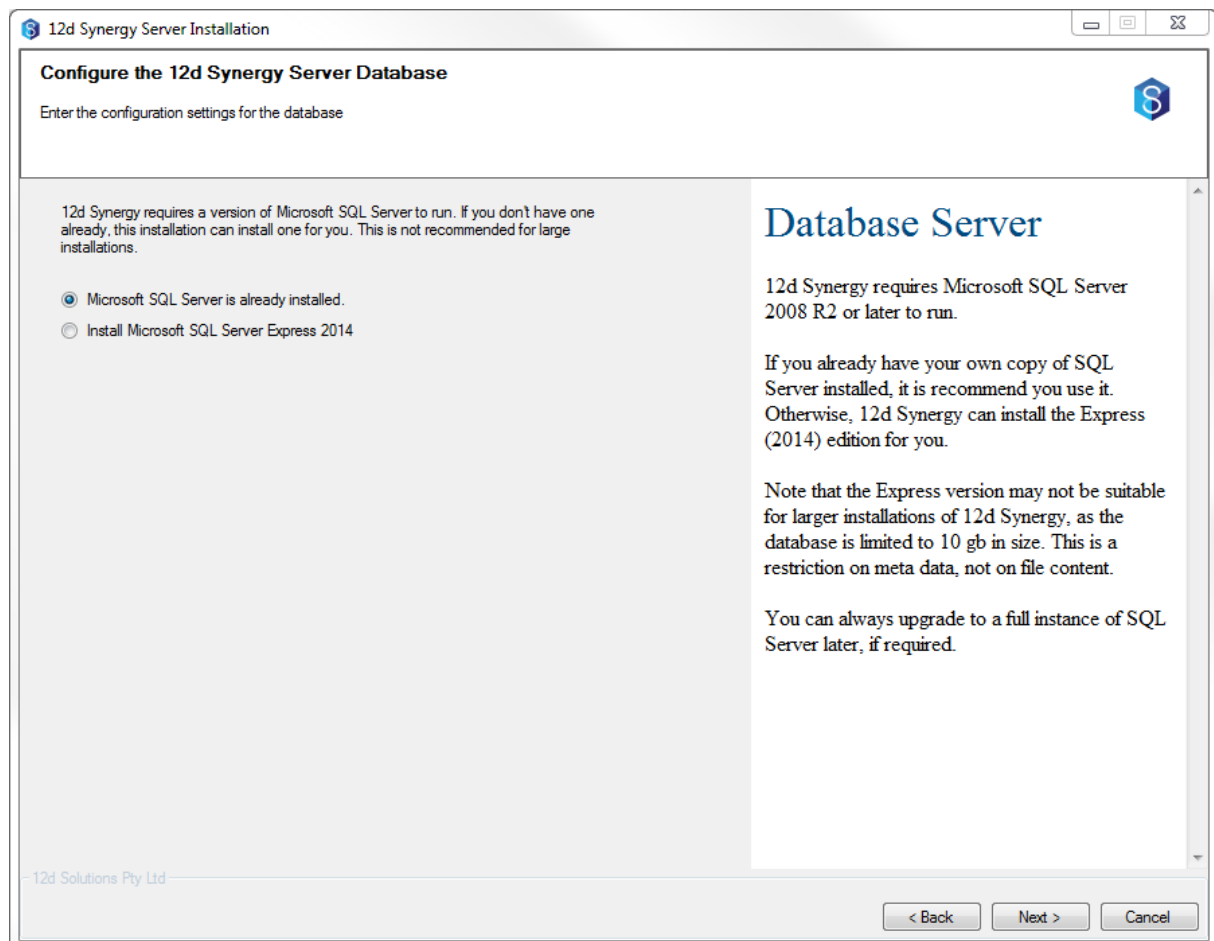
Setting	Description
Port	The primary port for meta data communication. You can change this but it is recommended to leave it at port 1212. If you change it, you will need to configure the client settings to use the new port number.
File transfer port	The port for file transfers. You can change this, but it is recommended to leave it at 1250. If you change it, you will need to configure the client settings to use the new port number.
Service account	<p>The login name of the account. If you are on a domain, enter it in the format: Domain\UserName</p> <p>e.g. YourCompany\ServiceAccount</p> <p>If you are not on a domain, enter it in the format: .\ServiceAccount</p> <p>The service account must have administrative access.</p>



Service password	The password of the service account
------------------	-------------------------------------

Note: The installer will attempt to test these credentials. In some cases, it may be possible for an incorrect result to this test, depending on the complexity of your network. This test should be taken as a guideline only - a failed result can be ignored if you are sure your credentials are correct.

2.5 Configure the 12d Synergy Server Database



You can now choose if you are using a pre-existing SQL Server, or if you would like 12d Synergy to install a new copy of SQL Server Express 2014 for you.

Note: If you choose to install SQL Server 2014 express, you must accept Microsoft's terms and conditions for the use of SQL Server 2014.



2.6 Configure the 12d Synergy Server DB – Already Installed

12d Synergy Server Installation

Configure the 12d Synergy Server Database

Enter the configuration settings for the database

Database instance: localhost
The SQL Server database server and instance

Database name: 12dSynergy
Database will be created if it doesn't exist

Database security: Windows Security

Test Connection

SQL Server Setup

Use this screen to enter the details for connecting to SQL Server.

The following fields are required:

Database instance	The address of the SQL Server - this might be a named instance so it's important to check. SQL Server Manager might help you identify your server location. You should also favour the use of a computer name over an IP address if possible, as TCP/IP is often not enabled by default. e.g: YourServer or YourServer\YourInstance
Database name	The name of the database to store 12d Synergy data in
Database security	How to log in - using the Service Account or another username / password combination. Windows security is generally recommend, but requires that the Service Account

< Back Next > Cancel

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If you choose to use an existing SQL Server, you will be prompted for the above information. If you chose to have one installed for you, you can skip this step.

Setting	Description
Database instance	The address of the SQL Server – this might be a named instance so it's important to check. SQL Server Manager might help you identify your server location. You should also the favour the use of a computer name over an IP Address if possible, as TCP/IP may not be enabled. <i>e.g: YourServer or YourServer\YourInstance</i>
Database name	The name of the database to store 12d Synergy data in
Database security	How to log in – using the Service Account or another username / password combination. Windows security is generally recommended, but requires that the Service Account you nominated earlier has access to the database. If you use SQL Server security, you will be prompted for a user name and password.

You can use the Test Connection button to test your settings against your database server.



2.7 Configure the 12d Synergy Server – Host and Mail Details

Configure the 12d Synergy Server
Enter the configuration settings for the server

Host address:
The name of this server

Mail server:
The address of a mail server to use when sending emails

Mail from:
The address to send emails from

☐ Use SMTP Authentication
User name:
Password:

Test your email settings
Send to:

Server Settings
Use this screen to set up additional information about how your server will behave, including settings for how the server will send emails to your users.

The following fields are required:

Host address	The name of the server - this helps identify the server to the 12d Synergy explorer. This will be filled out automatically for you and should not need to be changed in most cases.
Mail server	The address of an SMTP server that can send emails to your users
Mail from	The email address that 12d Synergy will send emails. Warning: Some mail servers require that the email account actually exists before sending!
Use SMTP Authentication	Some mail servers require login details to send email. This is usually done to prevent spammers from using an email address to send mail. You may need to consult your IT staff for login information.

< Back Next > Cancel

Setting	Description
Host address	The name of the server – this helps identify the server to the 12d Synergy client. This will be filled out automatically for you and should not need to be changed in most cases.
Mail server	The address of an SMTP server that can send emails to your users.
Mail from	The email address that 12d Synergy will send emails from. Warning: Some email servers require that the email account actually exists before sending!
SMTP Authentication	Some mail servers require login details to send email. This is usually done to prevent spammers from using an email address to send mail. You may need to consult your IT staff for login information.

You can send a test email to test your mail settings – you should receive an email at the nominated 'Send to' address if the values are correct.



2.8 Configure the 12d Synergy File Storage Settings

12d Synergy Server Installation

Configure the 12d Synergy Storage Settings

Data files: ...

The location where all files written and read by 12d Synergy are stored

File Storage Setup

12d Synergy stores all your data files for you, along with other configuration files.

This can be a local drive or a network attached location - but don't use a mapped drive. Use a full UNC path instead (e.g. \\MyServer\\MyFolder)

< Back Next > Cancel

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Setting	Description
Data Files	<p>12d Synergy stores all your data files for you, along with other configuration files.</p> <p>This can be a local drive or network attached location – but don't use a mapped drive unless you can guarantee it will exist when the service starts. Use a full UNC path where possible. (e.g: \\MyServer\\MyFolder)</p>



2.9 Configure the 12d Synergy Authorization Settings

Setting	Description
Authorization	<p>The mode to use for authorizing users.</p> <p>You can use Windows Single Sign On or Custom Usernames.</p> <p>Windows Single Sign is a mode where Microsoft Windows takes care of the logins for you. If your organization does not use Active Directory, you must ensure the users have an actual login on the server 12d Synergy runs on.</p> <p>Custom Usernames allows you to specify your own user names and passwords, but requires a trusted X.509 certificate from a Certification Authority be installed on the server. This is an advanced operation.</p> <p>Windows Single Sign On is the recommended method.</p>
Use Active Directory and AD Server	<p>Whether or not you would like Active Directory to manage your group membership for you. Active Directory will be used for authentication if you are on a Windows Domain, whether you choose to use your AD for group membership.</p> <p>If you do not use AD for group membership, you will need to manage your groups manually.</p>



2.10 Configure the 12d Synergy Server – Add an Admin User

Configure the 12d Synergy Server
Add the first administrative user that will log in

First name:

Last name:

Email:

Windows login:
Do not include the domain

Administrative User Setup

You must nominate the first administrative user account for 12d Synergy.

The following fields are required:

First name	The first name of the administrative user.
Last name	The last name of the administrative user.
Email	The email address of the administrative user.
Windows login	The login name of the user (if using Windows Single Sign on, do not include the domain name)
Password (only in custom mode)	If you are using custom usernames and passwords, you must enter a password for the administrative user

< Back Next > Cancel

Setting	Description
First name	The first name of the administrative user to create
Last name	The last name of the administrative user to create
Email	The email address of the administrative user
Windows login	The windows login (or custom login) of the administrative user. If you are using Windows Single Sign On, do not include the domain.



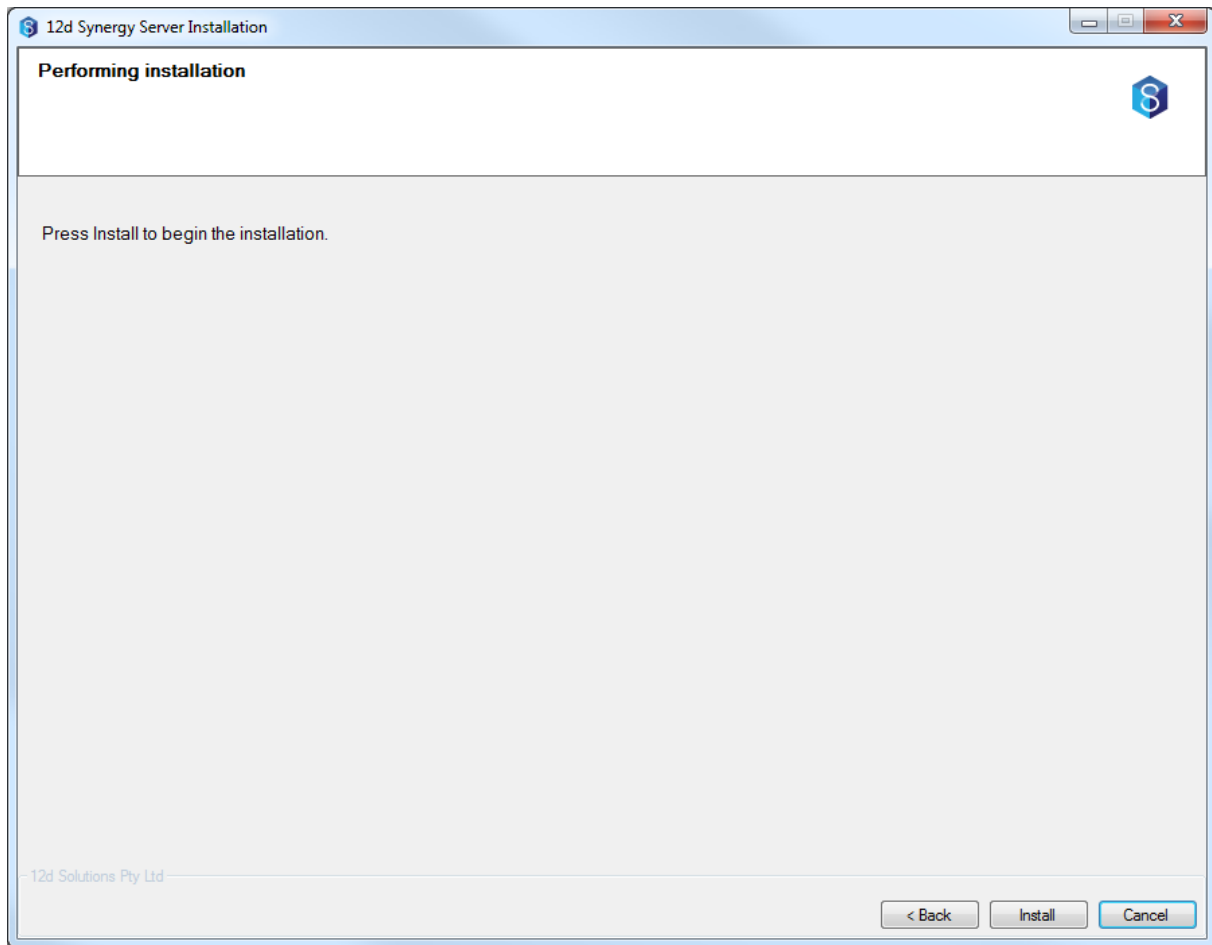
2.11 Install Your Licence File

The image shows a screenshot of the '12d Synergy Server Installation' window. The title bar reads '12d Synergy Server Installation'. The main window has a header 'Configure the 12d Synergy Server' with a sub-header 'Please specify your license file'. On the left, there is a 'License file:' label followed by a text input field and a browse button ('...'). On the right, the 'Licence Settings' section contains a message: 'A licence file is required to run 12d Synergy. You should have received one from a member of the 12d Synergy team. If you haven't, please contact us as soon as possible on sales@12dsynergy.com'. At the bottom left, it says '- 12d Solutions Pty Ltd'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

You will have been provided with a licence file by the 12d Synergy team. Please specify it here.



2.12 Performing Installation



You are now ready to perform the installation. Click install to begin.

3.0 VERIFYING THE INSTALLATION

To verify that the installation has worked,

1. Go to Start -> Control Panel -> Administrative Tools -> Services in Microsoft Windows.
2. Find the service named 12d Synergy Server
3. Ensure it is started



If it has not started, try the following steps:

1. Double click the service
2. Choose the log on tab
3. Re-enter the password for the Service Account and click OK
4. If this was not a service account, it will now be given the Service Account attribute by Windows
5. Right click and 'Start' the service

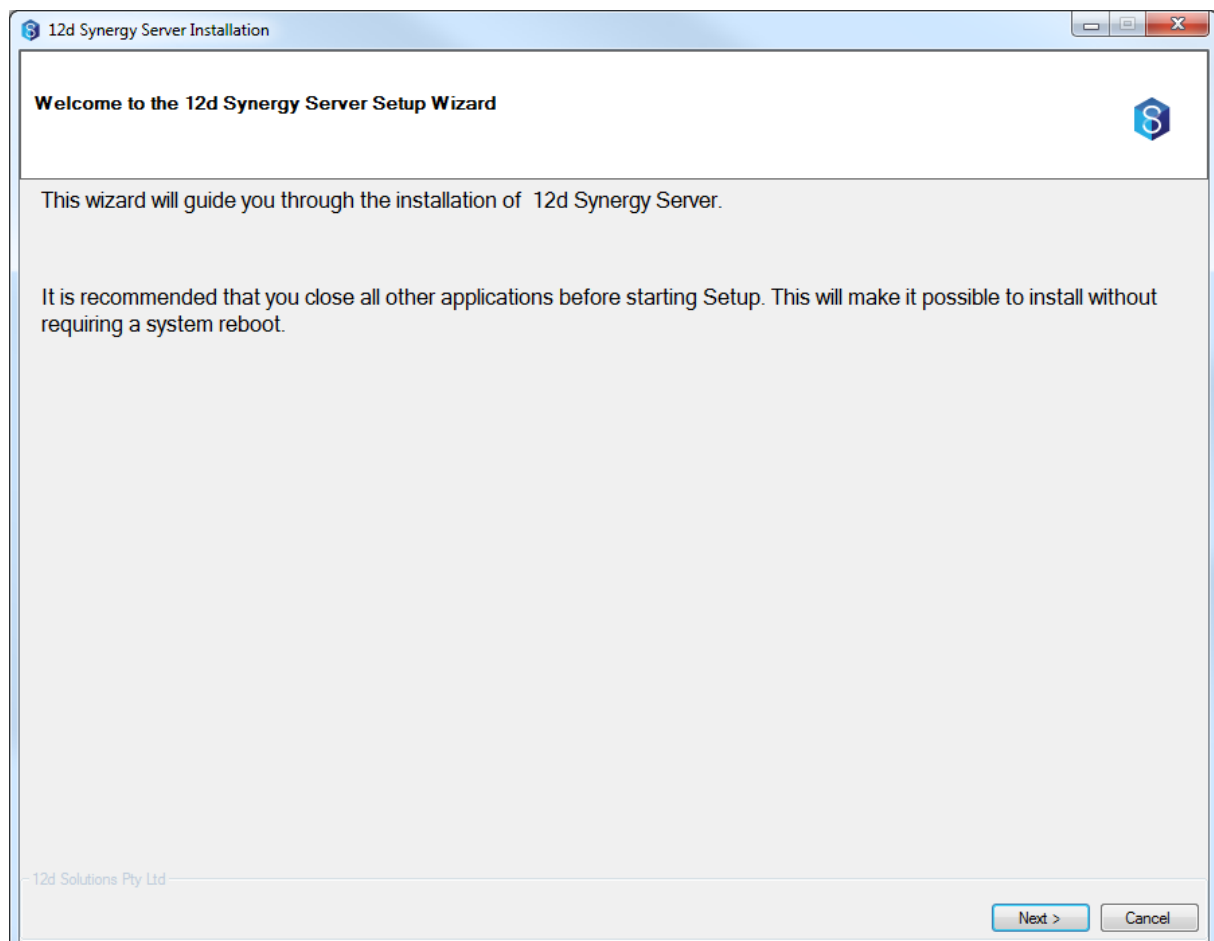
If the service has still not started, please consult the Windows Event Viewer for more details.

4.0 UPGRADING THE 12D SYNERGY SERVER

To upgrade the 12d Synergy server, you do not need to run the full installer each time. The upgrader will remember your settings from last time and unless anything has changed, the upgrade should be quick and easy.

1. Uninstall the existing 12d Synergy server – this will not delete your data
2. Run 12dSynergy_Server_Upgrade_x86.exe

4.1 Welcome to the 12d Synergy Server Installation



This is the welcome screen. Click next.



4.2 Configure the 12d Synergy Server

12d Synergy Server Installation

Configure the 12d Synergy Server

Configure the service account and port number under which this 12d Synergy server will run

Port: 1212

File transfer port: 1250

Service account: .vichard

Service password:

Service Accounts

A service account is a special user account that allows 12d Synergy to run even when no one is logged in. This account should have the *Log On As a Service* right or 12d Synergy may not start.

The following fields are required:

Port number	The unique 4-6 digit number that 12d Synergy will use for remote communications. You can change this, but it's recommended that you leave it at 1212
File transfer port	The unique 4-6 digit number that 12d Synergy will use for file transfers. You can change this, but it's recommended that you leave it at 1250
Service account	The login name of the account. If you are on a domain, enter it in the format: DOMAIN\UserName e.g. YourCompany\ServiceAccount If you are not on a domain, enter it in the format:

< Back Next > Cancel

Setting	Description
Port	The primary port for meta data communication. You can change this but it is recommended to leave it at port 1212. If you change it, you will need to configure the client settings to use the new port number.
File transfer port	The port for file transfers. You can change this, but it is recommended to leave it at 1250. If you change it, you will need to configure the client settings to use the new port number.
Service account	<p>The login name of the account. If you are on a domain, enter it in the format: Domain\UserName</p> <p>e.g. YourCompany\ServiceAccount</p> <p>If you are not on a domain, enter it in the format: .\ServiceAccount</p> <p>The service account must have administrative access.</p>



Service password	The password of the service account
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Note: The installer will attempt to test these credentials. In some cases, it may be possible for an incorrect result to this test, depending on the complexity of your network. This test should be taken as a guideline only - a failed result can be ignored if you are sure your credentials are correct.

4.3 Configure the 12d Synergy Server Database

If you choose to use an existing SQL Server, you will be prompted for the above information. If you chose to have one installed for you, you can skip this step.

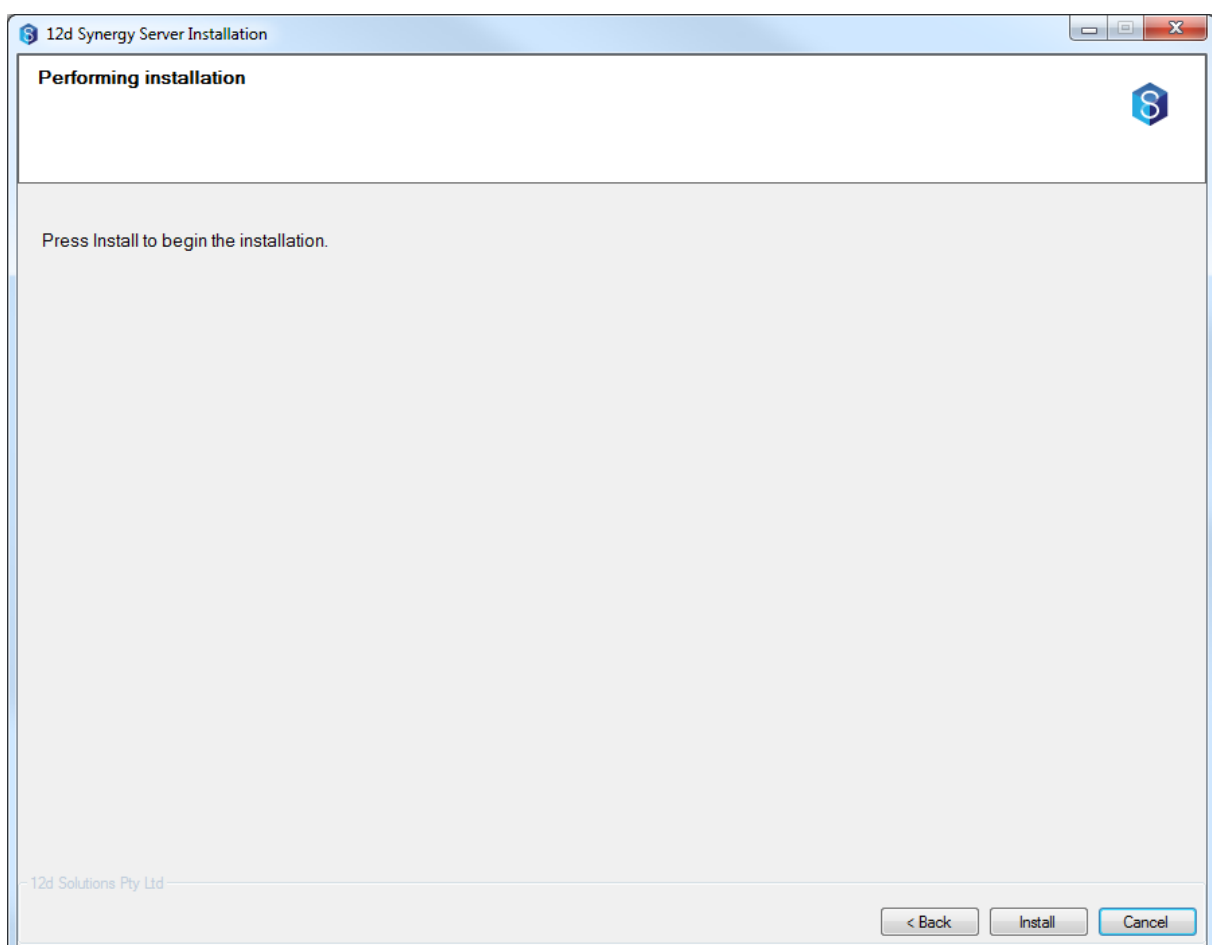
Setting	Description
Database instance	The address of the SQL Server – this might be a named instance so it's important to check. SQL Server Manager might help you identify your server location. You should also the favour the use of a computer name over an IP Address if possible, as TCP/IP may not be enabled. <i>e.g: YourServer or YourServer\YourInstance</i>
Database name	The name of the database to store 12d Synergy data in



Database security	<p>How to log in – using the Service Account or another username / password combination. Windows security is generally recommended, but requires that the Service Account you nominated earlier has access to the database.</p> <p>If you use SQL Server security, you will be prompted for a user name and password.</p>
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You can use the Test Connection button to test your settings against your database server.

4.4 Performing Installation



You are now ready to begin the upgrade. Click install to start the upgrade process.



5.0 SILENT INSTALLATIONS

The 12d Solutions Installer is capable of performing silent installations, which may assist in automatic rollouts of upgrades.

5.1 Generating an Answers File

To perform a silent installation, you will need to generate an answers file.

To do so, provide the following argument:

`-o PathToAnswersFile`

For example,

`12dSynergy_Server_Upgrade_x86.exe -o c:\temp\answers.txt`

When the installation is completed, an answers file will be generated for use time.

5.2 Performing a Silent Installation

To perform a silent installation, specify the following arguments on the command line:

`-gm2 -m silent -a PathToAnswersFile`

If you would like to also automatically uninstall the product first, use these arguments

`-gm2 -m silent -u -a PathToAnswersFile`

For example,

`12dSynergy_Server_Upgrade_x86.exe -gm2 -m silent -u -a c:\temp\answers.txt`



6.0 TEMPORARY PATHS

Please note that 12d Synergy will write any uploads and other assorted files to a temporary location before committing it to the data store. In this case, you must guarantee you have enough space in the temporary location to house any and potentially multiple concurrent uploads.

By default, 12d Synergy uses Windows default location - %TEMP%

The location of this can vary depending on the environment.

If you would like to move the temporary path to a disk with more space, you can do so by setting an environment variable (at the system level, or as a user variable for your service account)

This should be called:

12dSynergyTempPath

And should point to the location for temporary storage

EG: [\\MyNetwork\TempStorage](#)

If you are using a network drive, you should not use a mapped network drive and should always use a full UNC path.

[illegible]