

Senergy

Installation Guide

Version 25.4

Legal Notices

Condrey Corporation makes no representations or warranties with respect to the contents or use of this documentation, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Condrey Corporation reserves the right to revise this publication and to make changes to its content, at any time, without obligation to notify any person or entity of such revisions or changes.

Further, Condrey Corporation makes no representations or warranties with respect to any software, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Condrey Corporation reserves the right to make changes to any and all parts of the software at any time, without obligation to notify any person or entity of such revisions or changes. See the Software EULA for full license and warranty information with regard to the Software.

Any products or technical information provided under this Agreement may be subject to U.S. export controls and the trade laws of other countries. You agree to comply with all export control regulations and to obtain any required licenses or classification to export, re-export, or import deliverables. You agree not to export or re-export to entities on the current U.S. export exclusion lists or to any embargoed or terrorist countries as specified in the U.S. export laws. You agree to not use deliverables for prohibited nuclear, missile, or chemical biological weaponry end uses. Condrey Corporation assumes no responsibility for your failure to obtain any necessary export approvals.

Copyright © 2025 Condrey Corporation. All Rights Reserved.

No part of this publication may be reproduced, photocopied, or transmitted in any fashion without the express written consent of the publisher.

Condrey Corporation
120 North Laurens St.
Greenville, SC 29601
U.S.A.

<https://condreycorp.com/>

Third Party Systems

The software is designed to run in an environment containing third party elements meeting certain prerequisites. These may include operating systems, directory services, databases, and other components or technologies. See the accompanying prerequisites list for details.

The software may require a minimum version of these elements in order to function. Further, these elements may require appropriate configuration and resources such as computing, memory, storage, or bandwidth in order for the software to be able to perform in a way that meets the customer requirements. The download, installation, performance, upgrade, backup, troubleshooting, and management of these elements is the responsibility of the customer using the third party vendor's documentation and guidance.

Third party systems emulating any these elements must fully adhere to and support the appropriate APIs, standards, and protocols in order for the software to function. Support of the software in conjunction with such emulating third party elements is determined on a case-by-case basis and may change at any time.

Contents

Senergy	1
Installation Guide	1
Version 25.4	1
Legal Notices	3
Third Party Systems	5
Contents	7
About This Guide	1
Audience	1
1 - Overview	3
2 - Licensing the Product	5
2.1 - License Overview	5
2.1.1 - License Version	5
2.2 - Updating a License	5
2.3 - Obtaining an Evaluation License	5
3 - Configuring a SQL Server Instance	7
3.1 - SQL Server Requirements	7
3.1.1 - Supported Versions	7
3.1.2 - Supported Editions	7
3.1.3 - Dedicated Instance	7
3.2 - Install a New Instance of SQL Server	8
3.3 - SQL Server Post Configuration	14
4 - Installing CouchDB	17
4.1 - Recommendations	17
4.2 - Download and Install CouchDB	17
4.3 - Configure CouchDB Integration	19
5 - Upgrading to Senergy 25.4	21
5.1 - Upgrading from Senergy 6.x	21
6 - Installing Senergy 25.4	23
6.1 - Administrator Access	23

6.1.1 - Installing Components on Member Servers	23
6.1.2 - Managing Active Directory Accounts	23
6.1.3 - Granting Proxy Access to Resource Servers	23
6.2 - Accessing the Product Contents	23
6.3 - Installing the Engine	24
6.4 - Installing or Updating the License	26
6.4.1 - Installing a New License	26
6.4.2 - Updating the License	26
6.5 - Configuring the Database	27
6.6 - Configuring the Engine	30
6.7 - Active Directory Schema	33
6.7.1 - Extending the Active Directory Schema	34
6.8 - Granting Access to Managed Storage	36
6.9 - Installing the Event Monitor	36
6.10 - Installing File System Agents	39
6.11 - Installing Phoenix Agents	43
6.12 - Installing the Admin Client	47
6.13 - Authorizing the Event Monitor	47
6.14 - Authorizing the Agents	48
6.15 - Configuring Storage Resources	48
6.16 - Configuring the Data Owner Web Service	48
6.16.1 - Replacing the Self-Signed Certificate	52
7 - Administering Senergy	55

About This Guide

This installation guide is written to provide network administrators the conceptual and procedural information for installing and configuring Senergy 25.4.

Audience

This guide is intended for network administrators who manage user and collaborative network storage resources.

1 - Overview

If you are upgrading from Senergy 6.5 to Senergy 25.4:

1. Proceed with *Licensing the Product (page 5)*.
2. Follow the procedures in *Upgrading to Senergy 25.4 (page 21)*.

If you are installing Senergy 25.4:

1. Proceed with *Licensing the Product (page 5)*.
2. Follow the procedures in *Configuring a SQL Server Instance (page 7)* to install a database instance that Senergy supports.
3. Complete the installation by following the procedures in *Installing Senergy 25.4 (page 23)*.

2 - Licensing the Product

This section provides an overview of license types and procedures for managing the license.

2.1 - License Overview

Senenergy has multiple license types. Advanced data management and security capabilities are enabled in Senenergy only through the Gold license.

License Type	Capabilities
Gold	<ul style="list-style-type: none">• Identity-Driven policy management• Target-Driven policy management and reporting
Silver	<ul style="list-style-type: none">• Identity-Driven policy management

Individuals evaluating Senenergy may request a full-featured limited-time license of the core product and any advanced management capabilities.

2.1.1 - License Version

Senenergy 25.4 requires a Senenergy 7.0 license.

2.2 - Updating a License

After you have installed Senenergy, you can update your evaluation license or production license by simply replacing the old license with the new one. For more information, see [*Installing or Updating the License \(page 26\)*](#).

2.3 - Obtaining an Evaluation License

1. In a web browser, go to <https://condreycorp.com>.
2. From the Products menu, select Senenergy.
3. From the Senenergy product page, scroll down and click **Let's Get Started** button.
4. In the form, complete the required fields, and click **Submit**.
5. You will be contacted through email on procedures from obtaining an evaluation license and the Senenergy software.

3 - Configuring a SQL Server Instance

This section provides procedures for installing a Microsoft SQL Server instance with the settings needed to support Senergy.

SQL Server is a fully-featured database service, and as such requires installation and maintenance planning before deployment. While a complete analysis of this maintenance is beyond the scope of this product's documentation, we strongly recommend that you review Microsoft's SQL Server documentation to plan for separation of data and transaction logs, regular database backups, and transaction log and data growth.

3.1 - SQL Server Requirements

3.1.1 - Supported Versions

Senergy 25.4 supports the following versions of SQL Server:

- SQL Server 2025
- SQL Server 2022

3.1.2 - Supported Editions

The following editions of SQL Server are supported in production:

- SQL Server Express
- SQL Server Standard
- SQL Server Enterprise

We do not recommend that you install the Engine on the same server running SQL Server. If you will be using SQL Server Express, you can run it on the same server host, but you will most likely experience better performance if they are running on a separate server.

If you do not already own SQL Server, you can use SQL Server Express. You can download a current version of SQL Server Express for free at: <https://www.microsoft.com/en-us/sql-server/sql-server-downloads>.



NOTE: While SQL Server Express is sufficient in many cases, please be aware of its current limits around processing and disk capacity. Some scenarios may require more than the 10 GB storage limit that this edition currently supports.

3.1.3 - Dedicated Instance

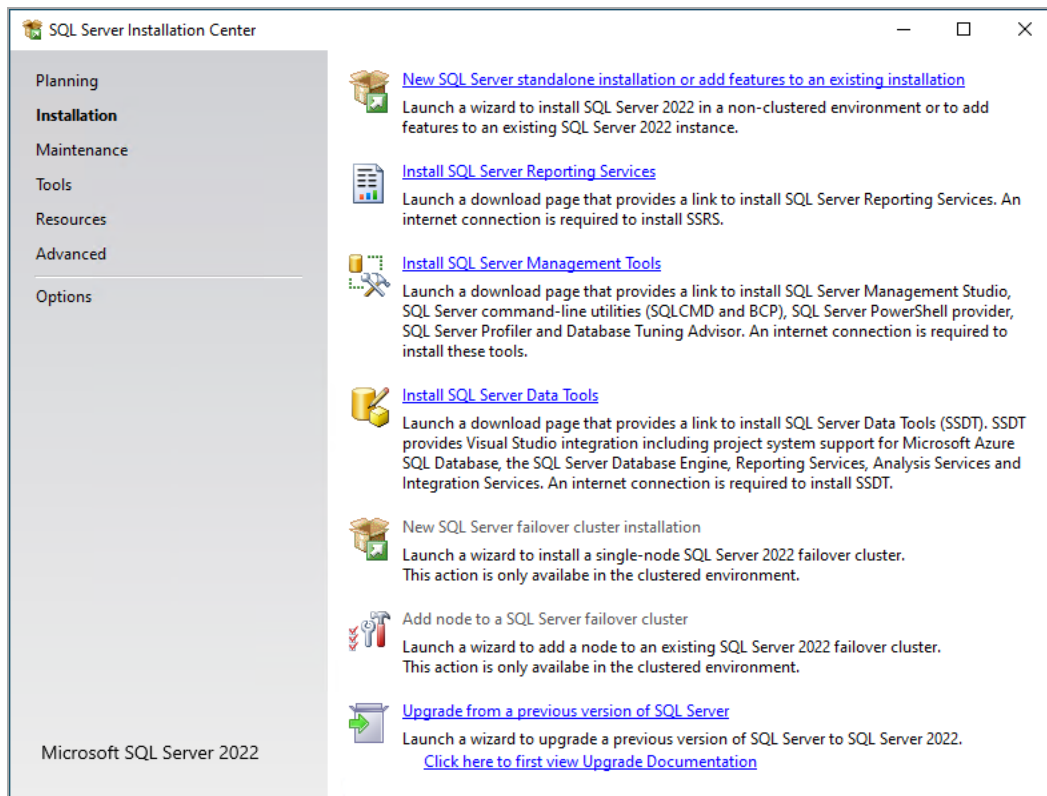
It is strongly recommended that you use configure a dedicated instance of SQL Server for Senergy, due to considerations with security and collation.

3.2 - Install a New Instance of SQL Server

The following procedures are specific to Microsoft SQL Server 2022. Procedures will vary based on your version of SQL Server.

These instructions assume that you are installing a single instance of SQL Server on a Windows Server host with no Azure integration.

1. From the Microsoft SQL Server ISO, double-click `setup.exe`.
2. On the SQL Server Installation Center page, click *Installation*.
3. Select *New SQL Server stand-alone installation or add features to an existing installation*.



4. Complete the following forms in the The SQL Server Setup wizard:
 - a. **Edition** - select the SQL Server edition, enter the product key, select the license option, then click *Next*.
 - b. **License Terms** - accept the license terms and click *Next*.
 - c. **Global Rules** - view the results then click *Next*.
 - d. **Microsoft Update** - click *Use Microsoft Update to check for updates* then click *Next*.

- e. **Install Rules** - review the results then click *Next*.
- f. **Azure Extension for SQL Server** - uncheck *Azure Extension for SQL Server* then click *Next*.
- g. **Feature Selection** - check *Database Engine Services*.

SQL Server 2022 Setup

Feature Selection

Select the Developer features to install.

Looking for Reporting Services? [Download it from the web](#)

Features:

Instance Features

- ☒ Database Engine Services
- ☐ SQL Server Replication
- ☐ Machine Learning Services and Language Ext
- ☐ Full-Text and Semantic Extractions for Search
- ☐ Data Quality Services
- ☐ PolyBase Query Service for External Data
- ☐ Analysis Services

Shared Features

- ☐ Data Quality Client
- ☐ Integration Services
- ☐ Scale Out Master
- ☐ Scale Out Worker
- ☐ Master Data Services

Redistributable Features

Feature description:

The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on the same computer.

Prerequisites for selected features:

Already installed:

- Windows PowerShell 3.0 or higher

To be installed from media:

- Microsoft Visual C++ 2017 Redistributable

Disk Space Requirements

Drive C: 92 MB required, 85947 MB available
Drive E: 902 MB required, 129933 MB available

Select All **Unselect All**

Instance root directory: E:\Microsoft SQL Server\

Shared feature directory: E:\Microsoft SQL Server\

Shared feature directory (x86): C:\Program Files (x86)\Microsoft SQL Server\

< Back **Next >** **Cancel**

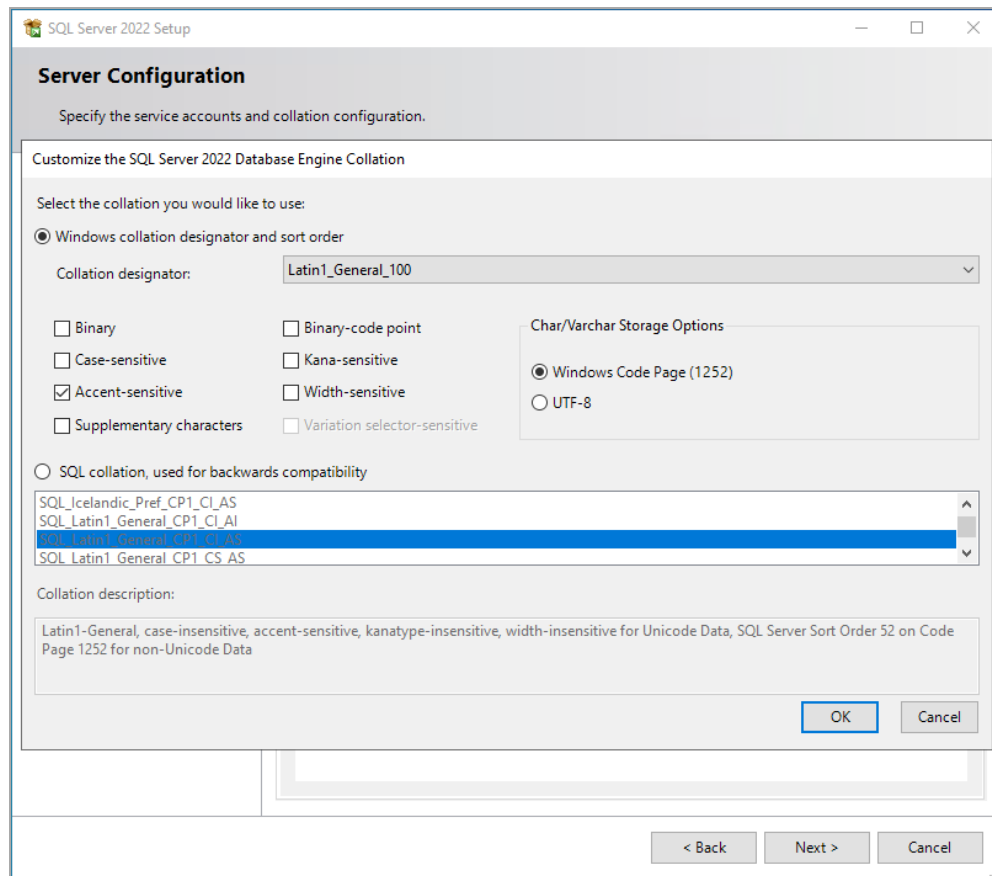
Review the installation paths then click *Next*.



NOTE: For larger installations consider installing the SQL Server instance on a separate volume by changing the *Instance Root Directory* path parameter.

- h. **Feature Rules** - review the results then click *Next*.
- i. **Instance Configuration** - Select the appropriate instance type, modify the *Instance ID* if desired, then click *Next*.
- j. **Server Configuration** - select the *Collation* tab then click *Customize*.

3 - Configuring a SQL Server Instance



- Select *Windows collation designator and sort order* then select your desired collation.

If possible select a collation that aligns with the Windows Server hosting the 25.4 Engine.

If you are unsure which collation to use, select *Latin1_General_100* which is a safe option for Senergy.



NOTE: Select one of the *_100 or later collations as these offer the best compatibility for advanced options such as *Supplementary characters*.

For more information on collation and locales, refer to this Microsoft document:

<https://learn.microsoft.com/en-us/sql/relational-databases/collations/collation-and-unicode-support>.



IMPORTANT: 25.4 requires the use of a Windows collation. Legacy SQL collations are not supported.

- [Optional] Select *Accent-sensitive* and *Supplementary characters*.
- [Optional] Select options for Kana-sensitive, Width-sensitive, and Variation selector-sensitive if you understand their impact with specific Asian character sets.
- Deselect all other options.
- Select *Windows Code Page (1252)* for the **Char/Varchar Storage Options**.



IMPORTANT: Senergy does not support the use of UTF-8 as a character storage option at this time.

Click *OK* to close the Collation customization dialog then click *Next*.

Database Engine Configuration - perform the following operations in this panel:

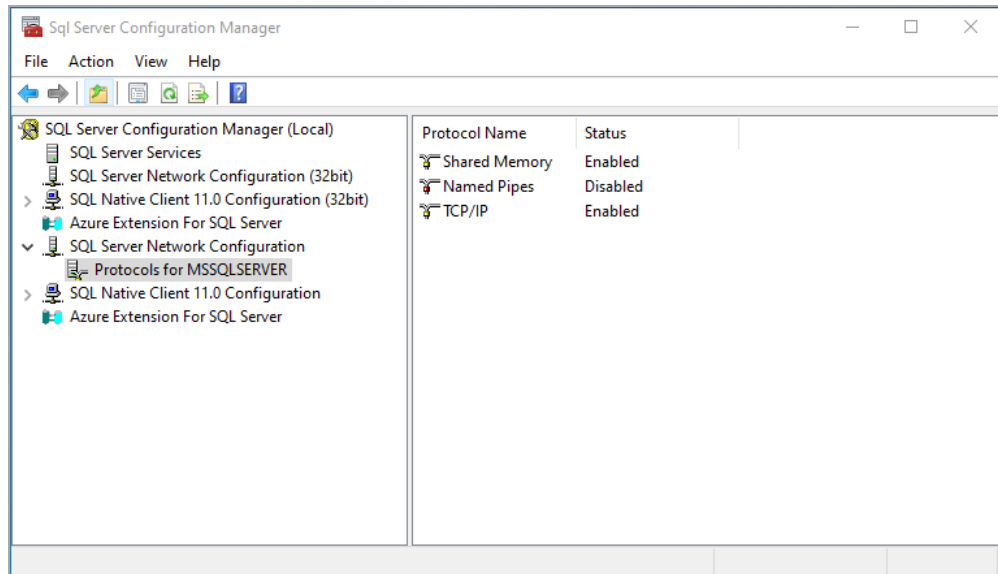
- Select *Mixed Mode (SQL Server authentication and Windows authentication)*.
- Enter a password for the sa account in the *Enter password* and *Confirm password* fields.
- Click *Add Current User* to add your current account to the *SQL Server administrators* list.

3 - Configuring a SQL Server Instance

The screenshot shows the 'Database Engine Configuration' window in the SQL Server 2022 Setup wizard. The window has a title bar 'SQL Server 2022 Setup' and standard window controls. Below the title bar is a subtitle 'Database Engine Configuration' and a description: 'Specify Database Engine authentication security mode, administrators, data directories, TempDB, Max degree of parallelism, Memory limits, and Filestream settings.' On the left is a navigation pane with the following items: Edition, License Terms, Global Rules, Microsoft Update, Product Updates, Install Setup Files, Install Rules, Azure Extension for SQL Server, Feature Selection, Feature Rules, Instance Configuration, Server Configuration, **Database Engine Configuration** (highlighted), Feature Configuration Rules, Ready to Install, Installation Progress, and Complete. The main area has tabs: 'Server Configuration' (selected), 'Data Directories', 'TempDB', 'MaxDOP', 'Memory', and 'FILESTREAM'. The 'Server Configuration' tab contains the following sections: 'Specify the authentication mode and administrators for the Database Engine.' with 'Authentication Mode' set to 'Mixed Mode (SQL Server authentication and Windows authentication)'; 'Specify the password for the SQL Server system administrator (sa) account.' with 'Enter password:' and 'Confirm password:' fields, both containing masked text; and 'Specify SQL Server administrators' with a list box containing 'MAX\Administrator (Administrator)' and buttons 'Add Current User', 'Add...', and 'Remove'. A note on the right states: 'SQL Server administrators have unrestricted access to the Database Engine.' At the bottom are '< Back', 'Next >', and 'Cancel' buttons.

Review your selections then Click *Next*.

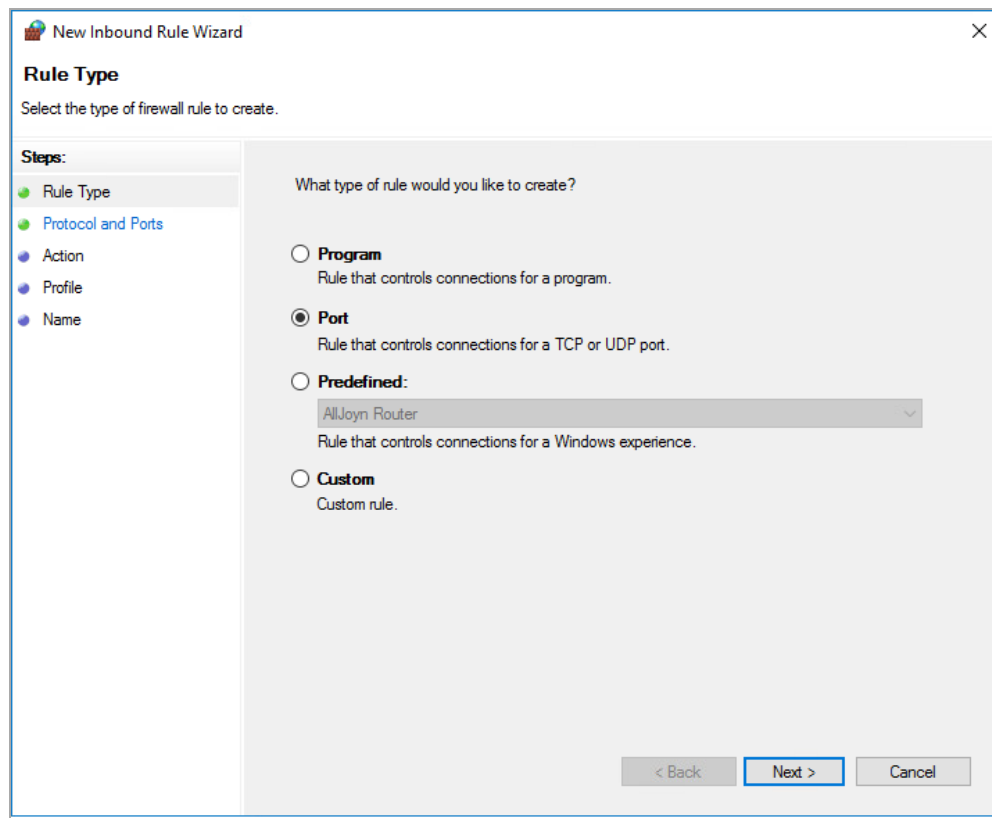
- k. **Feature Configuration Roles** - review any messages then click *Next*.
 - l. **Ready to Install** - perform a final review of all installation options then click *Install*.
 - m. **Complete** - once the installation is complete click *Close* to exit the setup wizard.
5. From the Windows Start Menu launch *SQL Server Configuration Manager*.
 - a. In the left pane, expand *SQL Server Network Configuration*.
 - b. Click *Protocols for MSSQLSERVER* (or the name of the database instance you chose earlier).



- c. Right-click *TCP/IP* and select *Properties*.
 - d. Click the **Protocol** tab.
 - e. Set the *Enabled* field to *Yes*.
 - f. Set the *Listen All* field to *Yes*.
 - g. Click the **IP Addresses** tab.
 - h. Under the *IPAll* heading at the bottom, set the TCP Port field to 1433
 - i. Click *OK*.
 - j. Close the SQL Server Configuration Manager.
6. Launch Windows Firewall with Advanced Security.
 - a. From the left column, click *Inbound Rules*.
 - b. From the *Actions* column, click *New Rule*.

3 - Configuring a SQL Server Instance

- c. In the Rule Type page, select *Port*.



- d. Click *Next*.
- e. In the Protocol and Ports page, enter 1433 in the *Specific local ports* field, then click *Next*.
- f. In the Action page, accept the default setting by clicking *Next*.
- g. In the Profile page, accept the default settings by clicking *Next*.
- h. In the Name page, specify a name for the new inbound rule in the *Name* field.
For example, SQL Server.
- i. Click *Finish*.

3.3 - SQL Server Post Configuration

Review these points and make any needed adjustments to your SQL database settings before installing and configuring the Engine:

- The SQL Server service must be listening via TCP/IPv4 as the Engine requires it for access.
- Some editions of SQL Server do not have TCP/IP enabled by default. If there are multiple instances, the instance that you just installed and configured might not be

listening on the default TCP port of 1433.

- Firewall rules may need updating.

4 - Installing CouchDB

Apache CouchDB is the NoSQL database that Senergy uses for:

- Work Log reports
- Security Policy reporting for Notification, Lockdown and Fencing policies
- Workload reporting

If you do not plan to initially create any of these policies, there is no need to install CouchDB. However, we recommend that you do so anyway so that your system will be ready once you decide to do so.

4.1 - Recommendations

- Disk space requirements depend on a number of variables including the number of policy target paths, the number of files and folders in each target, and the frequency of policy execution.
- We recommend the CouchDB host be a multi-processor system with a minimum of 4 GB of RAM. If you host CouchDB on a server that also hosts the Engine, Event Monitor, or database, the RAM requirements are in addition to the RAM for those services.
- While CouchDB may be installed on any of its supported platforms, we only support troubleshooting of CouchDB instances installed on Windows or Linux platforms.

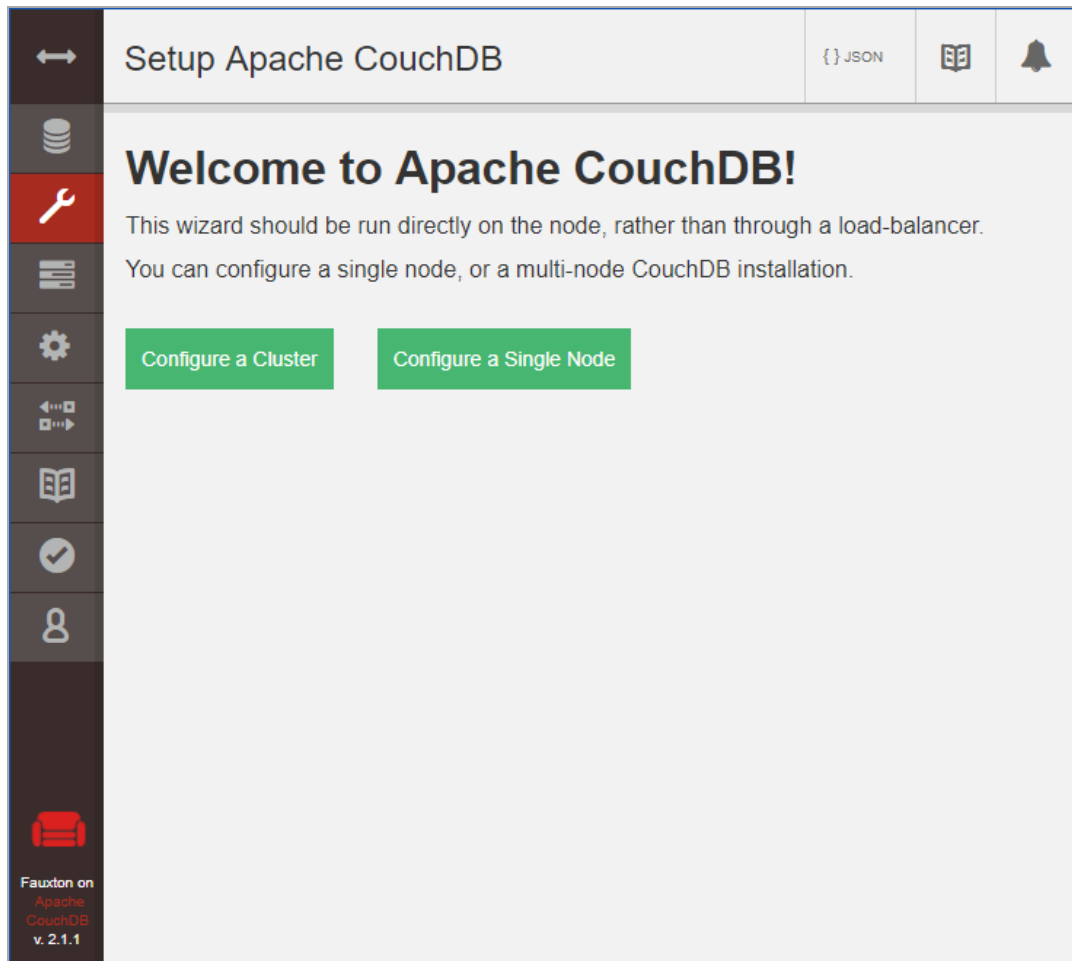
4.2 - Download and Install CouchDB

The following are a minimal set of procedures for installing CouchDB.

1. From <https://couchdb.apache.org/#download>, download the latest version of CouchDB for the server that will host the CouchDB database.
2. Launch the downloaded installation file.
3. Follow the wizard steps to complete the installation. Installation and configuration guides can be found at <https://docs.couchdb.org/en/stable/install/index.html>.
4. Launch Apache CouchDB Fauxton. This launches the Apache CouchDB administrative interface in a web browser.

4 - Installing CouchDB

5. Click *Setup* (the wrench icon).



6. Click *Configure Single Node*.

The screenshot shows the 'Setup Apache CouchDB' web interface. The sidebar on the left contains icons for navigation. The main content area is titled 'Setup Apache CouchDB' and includes the following sections:

- Create Admin credentials.** This section contains two input fields: 'Username' and 'Password'.
- Bind address the node will listen on** This section contains an input field labeled 'IP Address'.
- Port that the node will use** This section contains an input field with the value '5984'.

At the bottom of the main content area is a green button labeled 'Configure Node'. The bottom of the sidebar displays the text 'Fauxton on Apache CouchDB v. 2.1.1'.

7. Specify the Admin credentials entered during installation, or create a new administrator username and password.
8. Leave the IP address setting open or 0.0.0.0, and leave the Port setting at 5984.
9. Click *Configure Node*.

4.3 - Configure CouchDB Integration

Use the Senergy Admin Client to configure the CouchDB settings by referring to the appropriate section in the *Senergy 25.4 Administration Guide*

- For Security and Workload policies, see Establishing the CouchDB Settings in the Admin Client.
- For the Work Log, see Establishing the Work Log Database Settings in the Admin Client. Establishing the Work Log Database Settings in the Admin Client.

5 - Upgrading to Senergy 25.4

Senergy 25.4 supports direct upgrades from the following previous releases:

- Senergy 24.1 or later
- Senergy 6.6
- Senergy 6.5

To upgrade from an earlier release, first upgrade to Senergy 6.5, then perform the upgrade to Senergy 25.4.

5.1 - Upgrading from Senergy 6.x

Upgrading to Senergy 25.4 requires updates to all components.

Due to key changes in communication protocols and back-end data structures, all components must be upgraded to 25.4 for this release.

While there is no specific order of upgrade required, we generally recommend upgrading components in the following order:

- Engine / Data Owner Client web service
- Admin Client
- Event Monitor
- File System Agent
- Phoenix Agent

6 - Installing Senergy 25.4

This section provides procedures for installing and configuring the Engine, database, Event Monitor, Agents, and Admin Client. For information on how these components work in a Senergy deployment, reference the Overview in the *Senergy 25.4 Administration Guide*.

You should follow these procedures only after you have performed the prerequisite tasks in *Installation Prerequisites*, obtained a Senergy 7.0 product license as indicated in *Licensing the Product (page 5)*, and installed a database instance as specified in *Configuring a SQL Server Instance (page 7)*

This section also provides procedures for assigning rights and privileges to the Proxy Rights group that is created when you install the Admin Client.

6.1 - Administrator Access

6.1.1 - Installing Components on Member Servers

In order to successfully configure the Engine, Event Monitor, Agents, and the Data Owner web service, you must be logged in to the member server with an Active Directory domain account that has local Administrators (BUILTIN\Administrators) membership on that server.

6.1.2 - Managing Active Directory Accounts

When configuring the Engine service, you will need to be logged on to the member server with an Active Directory account that has access to create or modify domain groups and a proxy user account. This is in addition to the user also having local Administrators group membership.

Typically, having membership in the Domain Admins group of the domain where the Engine server is installed is sufficient. In cases where this is not possible, delegated write and modify access to users and groups in a container may suffice.

6.1.3 - Granting Proxy Access to Resource Servers

For Windows servers hosting managed shares but will not have a File System or Phoenix Agent installed, it is necessary to setup the local Administrators membership and privileges for the proxy account. The user setting this up has the same administrator access requirements as someone configuring an agent on that server.

6.2 - Accessing the Product Contents

1. On the Windows server that will host the Engine, copy to a directory the `Senergy-25.4.iso` file that was made available to you following your purchase of Senergy 25.4.
2. Mount the `Senergy-25.4.iso` file.
3. Note the location of the mounted ISO.
4. This is the installation source you will use to install Senergy components.

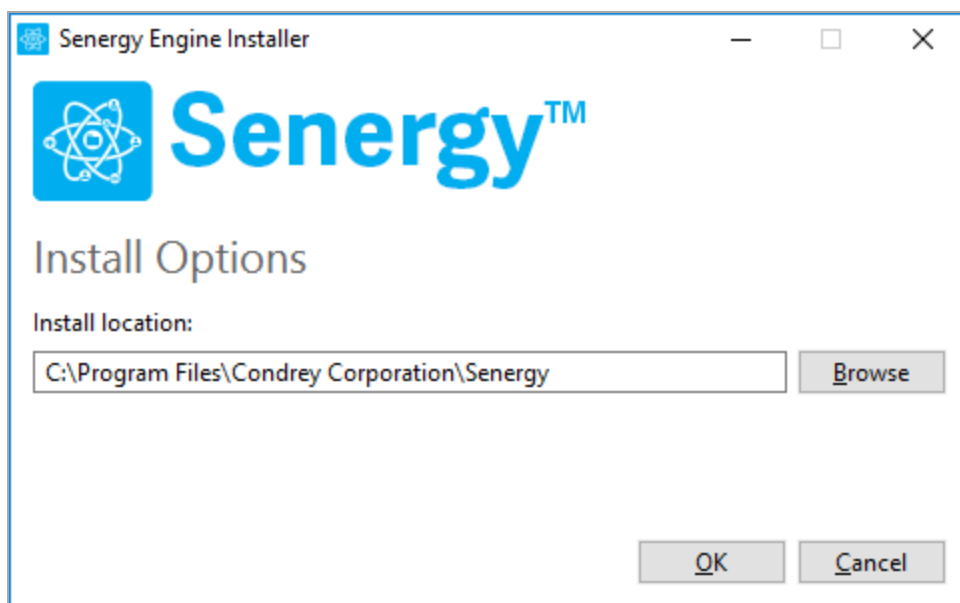
6.3 - Installing the Engine

Senergy uses only one Engine per forest. The Engine can be installed on host server that meets the following **minimum** requirements:

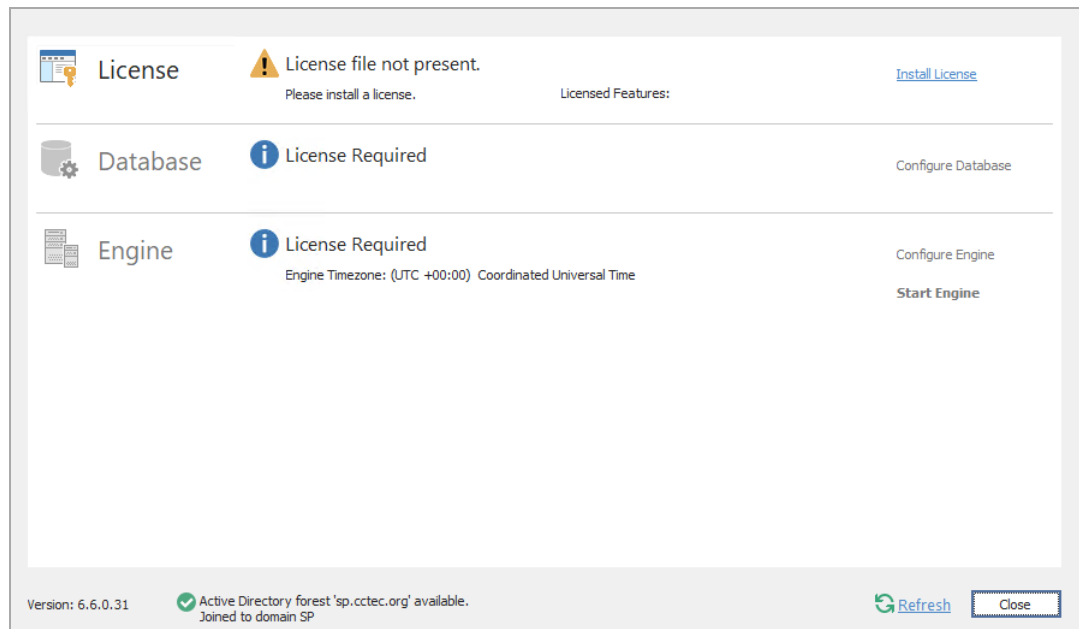
- Microsoft Windows Server 2025 (Member Server)
- Microsoft Windows Server 2022 (Member Server)
- Microsoft Windows Server 2019 (Member Server)
- At least 8 GB RAM
 - 4 GB for the Engine service
 - 4 GB for the Data Owner web service installed with the Engine
- For quota management, Microsoft File System Resource Manager (FSRM) must be installed; see File Server Resource Manager in the *Senergy 25.4 Administration Guide*.
- Forest functional level of Windows Server 2003 or later

Other notable information about the Engine:

- The Engine runs as a service that is configured to start by using the Local System account
 - The default Engine port is 3009
 - The firewall inbound rule is added during the Engine installation
1. At the root of the `Senergy-25.4.iso` image, double-click `Senergy-Engine-25.4.exe`.
 2. When you are asked if you want to run this file, click *Run*.
 3. Agree to the licensing terms and conditions.
 4. (Conditional) If you want to install the Engine to a location other than the default path, click *Options*.



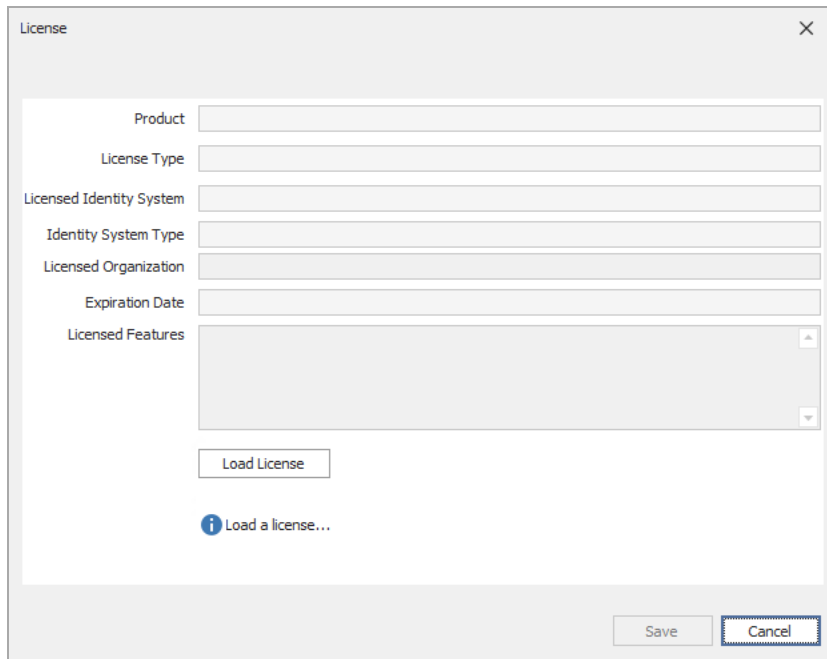
5. In the *Install location* field, specify the new path and click *OK*.
6. Click *Install*.
7. Read the overview on the initial page of the wizard and click *Next*.
8. Click *Install*.
9. Click *Finish* to close the wizard.
10. The Install Successful message indicates that the Engine and Config Utilities were installed successfully.
11. Click *Run Configuration Utility*.
12. The Configuration Utility is launched.



6.4 - Installing or Updating the License

6.4.1 - Installing a New License

1. In the Configuration Utility, click **Install or Update License**.
2. The License dialog box appears.



The screenshot shows a dialog box titled "License" with a close button (X) in the top right corner. The dialog contains several input fields for license information: "Product", "License Type", "Licensed Identity System", "Identity System Type", "Licensed Organization", "Expiration Date", and "Licensed Features" (which is a multi-line text area). Below these fields is a "Load License" button. Underneath the button is a blue information icon followed by the text "Load a license...". At the bottom right of the dialog are "Save" and "Cancel" buttons.

3. If no license is found, the license properties will be empty.
4. Click **Load License**, then browse to and select the license file.
5. When the confirmation prompt appears, click **Yes**.
6. Examine the license properties to ensure that the license is valid.
7. Click **Close**.

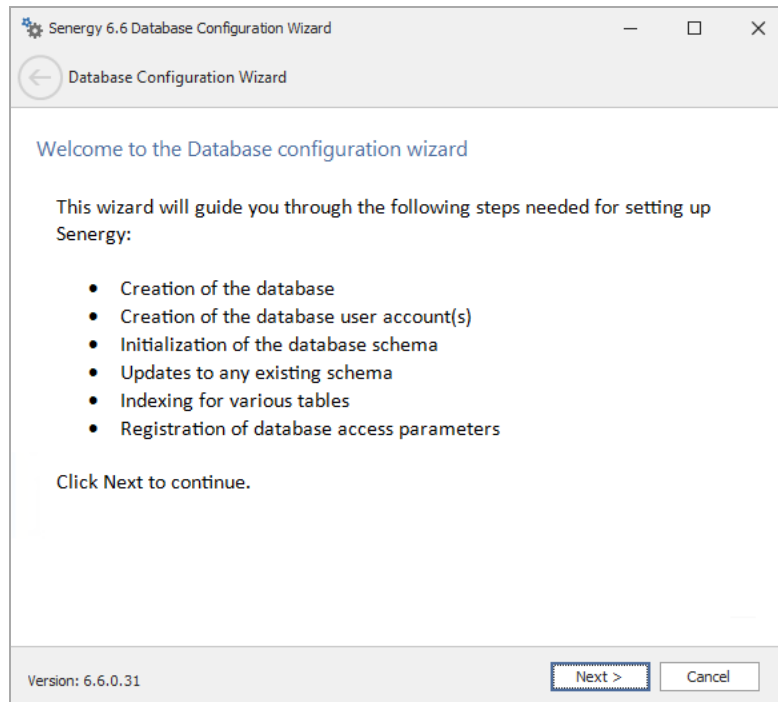
6.4.2 - Updating the License

After you have installed Senergy, you can update your evaluation license or production license by simply replacing the old license with the new one.

To replace an existing license simply install a new one by following the instructions in the previous section [*Installing a New License \(page 26\)*](#).

6.5 - Configuring the Database

1. In the Configuration Utility, click *Configure Database*.



2. The page indicates what database configuration tasks are to be completed in this wizard.
3. From the wizard page, read the overview of what will be configured and click *Next*.

6 - Installing Senergy 25.4

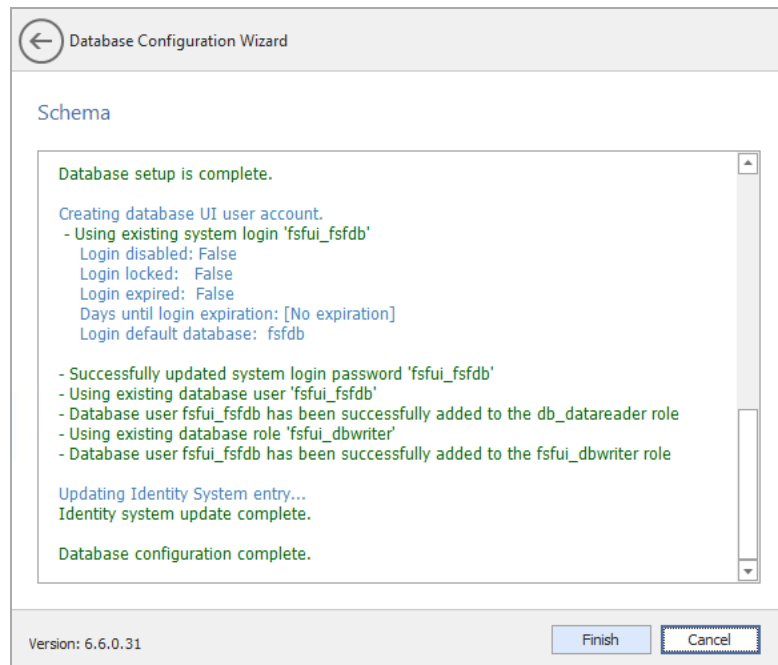
4. The following page appears:

The screenshot shows the 'Database Configuration Wizard' window. At the top, there is a back arrow icon and the title 'Database Configuration Wizard'. Below the title bar, the section 'Database Connection' is displayed. Under 'Database Properties', the 'Type' is set to 'SQL Server'. The 'Communication' section contains fields for 'Database Host Address' (srs-m3.sp.cctec.org), 'Port' (1433), and 'Initial Database' (fsfdb). The 'Database Service Account' section has a prompt 'Enter the name of a database account for this application.' and fields for 'Database Account Name' (fsfadmin), 'Password', and 'Verify Password'. The 'Database Admin Credentials' section has a prompt 'Enter the credentials needed for provisioning the database.', a checkbox for 'Use Windows Authentication' (which is unchecked), and fields for 'Database Administrator' (sa) and 'Password'. At the bottom left, the version '6.6.0.31' is shown. At the bottom right, there are 'Next >' and 'Cancel' buttons.

5. This page lets you establish the settings needed for the Engine to communicate with the database.
6. **Database Properties:** Displays information on the database.
7. **Type:** Displays the supported database.
8. **Communication:** Specifies address, port number, and name of the database.
9. **Database Host Address:** Specify the host address of the server where the database is installed.
10. **Port:** The default SQL Server port setting is 1433. If there is a port conflict, you can change it.
11. **Initial Database:** The default name of the Senergy database.
12. **Database Service Account:** Use this region to set authentication information for the database service account, which is the database account that the Engine uses to sign in to the database.
13. **Database Account Name:** By default, the database account is fsfadmin, which you can change in this field.
14. **Password:** Specify a password for the service account to connect to the database.
15. **Verify Password:** Specify the password again in this field.
16. **Database Admin Credentials:** Use this region to establish the database administrator name and credentials.
17. **Use Windows Authentication:** Selecting this check box specifies that you want to configure the database using the authentication credentials of a Windows network

administrator, rather than the credentials of a SQL Server database administrator. Selecting this check box disables the *Database Administrator* and *Password* fields.

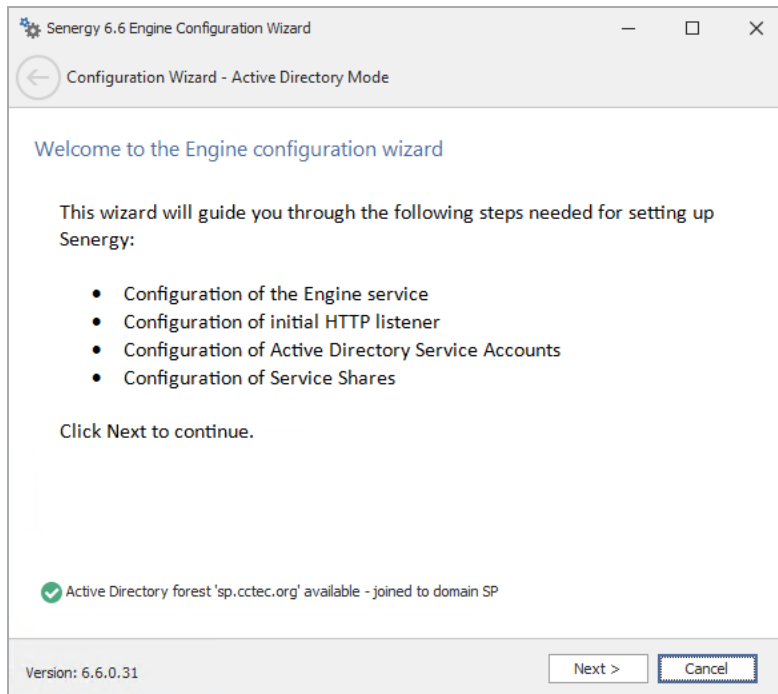
18. **Database Administrator:** Specify the SQL Server administrator name.
19. **Password:** Specify the SQL Server administrator password.
20. Complete the fields and click *Next*.



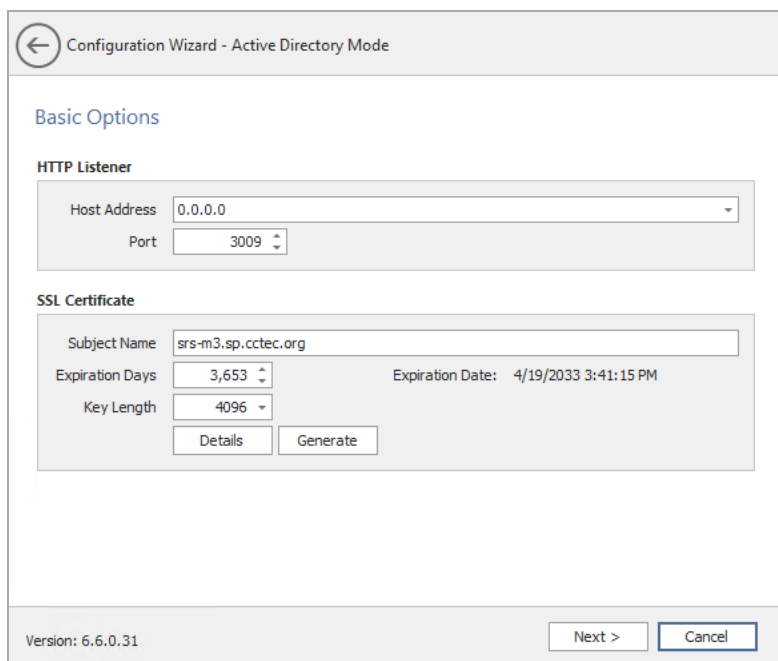
21. Review the configuration log and click *Finish*.

6.6 - Configuring the Engine

1. In the Configuration Utility, click *Configure Engine*.



2. From the wizard page, read the overview of what will be configured and click *Next*.



3. This page lets you confirm or change basic Engine configuration settings.

4. **HTTP Listener:** Communication parameters for the Engine.
5. **Host Address:** To listen to all addresses, leave the setting at 0.0.0.0. To limit listening to a specific address, enter the address here.
6. **Port:** The default port is 3009.
7. **SSL Certificate:** Details for the SSL certificate that will be generated.
8. **Subject Name:** The name of the certificate that will be generated. The server name is listed by default.
9. **Expiration Days:** The life span of the security certificate, which is set at 10 years by default.
10. **Key Length:** The SSL certificate encryption setting, which is set at 2048 by default.
11. **Details:** Click the button to view the certificate data.
12. **Generate:** If you modify any of the settings in the SSL Certificate region, click this button to generate a new certificate.
13. Edit any needed parameters settings and click *Next*.

Senergy 6.6 Engine Configuration Wizard

Configuration Wizard - Active Directory Mode

Active Directory Service Accounts

Proxy Account
Enter the name of a service account used by the Engine and Agents for all operations.

Proxy Rights Group
Enter the name of a service group used for rights assignments for access to server, share, and file resources. The Proxy Account will automatically be assigned as the initial member of this group.

Admins Group
The Admins Group is used to restrict access to logon and manage Senergy.
Note that the current logged on user **SP\administrator** will be added to this group.

Proxy Account: SP\senergyproxy

Proxy Rights Group: SP\senergyproxrights

Admins Group: SP\senergyadmins

Accounts Container: OU=Service Accounts,DC=sp,DC=cctec,DC=org Browse

Version: 6.6.0.31 Next > Cancel

14. This page lets you establish a name for the Proxy Account, Proxy Rights, and Admins Groups.
15. Senergy uses proxy accounts so that it can perform tasks necessary for storage management.
16. Because you will want to create the proxy objects in an Active Directory container appropriate to your environment, you can specify the container using the *Browse* button.
17. In this example, the proxy objects are being created in the Service Accounts container.

6 - Installing Senergy 25.4

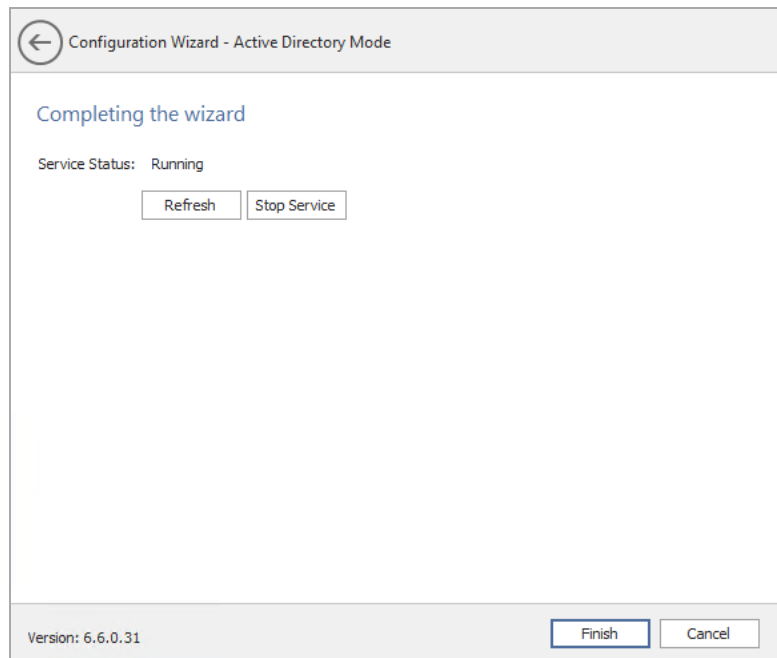
18. Establish your proxy account settings and click *Next*.

The screenshot shows the 'Configuration Wizard - Active Directory Mode' window. The title bar reads 'Senergy 6.6 Engine Configuration Wizard'. The main heading is 'Proxy Home Share'. Below this, a text box explains: 'The **Senergy** Proxy Home share is used as a temporary read-only location in the case where managed data is moved from one location to the next. You may use a pre-existing share of your choice. The share name should be entered using the standard UNC path format.' At the bottom, there is a text input field labeled 'Proxy Home Share' containing the value '\\srs-m1.sp.cctec.org\ProxyHome'. The footer shows 'Version: 6.6.0.31' and two buttons: 'Next >' and 'Cancel'.

19. The Proxy Home Share that you establish in this page is the read-only location where users' managed path attributes are temporarily set when data is moved because of a change in policy.
20. Click *Next*.

The screenshot shows the 'Configuration Wizard - Active Directory Mode' window. The title bar reads 'Senergy 6.6 Engine Configuration Wizard'. The main heading is 'SMTP Settings'. Below this, there are two sections: 'Mail Listener' and 'Mail Options'. The 'Mail Listener' section has fields for 'Host Address' (127.0.0.1), 'Port' (25), and 'Connection Type' (TLS). The 'Mail Options' section has a 'From Address' field (fsf-alerts@srs-m3.sp.cctec.org), a checkbox for 'Use Authentication' (unchecked), and fields for 'Username' and 'Password'. At the bottom, there is an 'Email Address' field and a 'Send Test Email' button. The footer shows 'Version: 6.6.0.31' and two buttons: 'Next >' and 'Cancel'.

21. Target-Driven security policies allow for email notifications to be sent to designated recipients. These notifications are sent to your email server to be relayed.
22. Completing fields in this page is optional.
23. **Mail Listener:** These fields specify information pertaining to the mail server that is sending alerts.
24. **Host Address:** Specify the IP address or DNS name of the mail server.
25. **Port:** Specify the port number for the mail server.
26. **Connection Type:** From the down-down menu, select the encryption type used by your mail server.
27. **Mail Options:** These fields specify additional mail information.
28. **From Address:** This field specifies the default address where the alerts come from.
29. **Use Authentication:** In most cases, SMTP will require authentication. Selecting this check box activates the *Username* and *Password* fields where you can enter the credentials for authenticating to the SMTP server.
30. **Email Address:** Specify an email address for a test alert.
31. **Send Test Email:** Click this button to send a test email to the recipient specified in the Email Address field.
32. Establish your SMTP settings and click *Next*.



33. Click *Finish*.

6.7 - Active Directory Schema

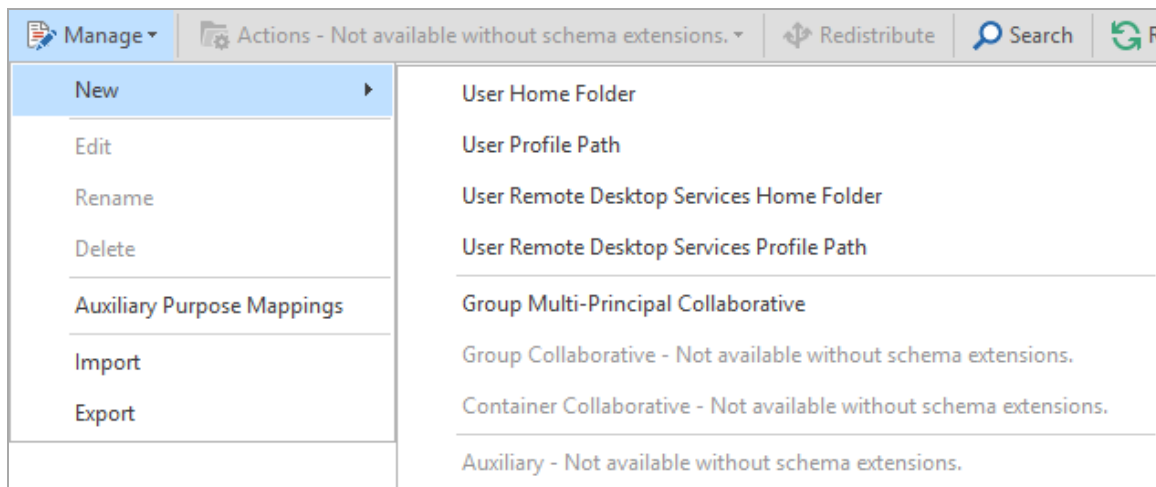
The Microsoft Active Directory schema contains formal definitions of every object class that can be created in an Active Directory forest. The schema also contains formal definitions of

6 - Installing Senergy 25.4

every attribute that can exist in an Active Directory object.

To enable collaborative storage or auxiliary storage management, Senergy extends the Active Directory schema to enable Senergy attributes. These attributes are specified in Active Directory Schema Extensions in the *Senergy 25.4 Administration Guide*.

The dimmed options in the menu in the graphic below display which policy types require that the Active Directory schema be extended.



For example, User Home Folder policies do not require an Active Directory schema extension; Group Collaborative policies do.

6.7.1 - Extending the Active Directory Schema

1. Log in to the forest or domain as a user with Schema administration privileges.
2. You can do this by being a member of the Schema Admins group.
3. From the *Start* menu, select *Senergy > Senergy Schema Utility*.

4. When you are asked if you want to run this file, click *Run*.

```
Starting fsfschematool version 6.6.0.31
Attempting to resolve current Domain...
Accessing current schema for AD Forest 'fsf.test.lab'
Obtained handle to schema

Current Forest Mode Level = 7
Current Forest Level 'Windows2016Forest' is good.

Checking for File Management attribute schema extensions...
-> ccx-FSFAuxiliaryStorage : does not exist
-> ccx-FSFManagedPath : does not exist

Checking for existing File Management class schema extensions...
-> ccx-FSFManagedAttributes : does not exist

One or more schema definitions need extending.

Perform File Management schema extensions? [Y/N]:
```

5. Type *y* to extend the schema.

```
Starting fsfschematool version 6.6.0.31
Attempting to resolve current Domain...
Accessing current schema for AD Forest 'fsf.test.lab'
Obtained handle to schema

Current Forest Mode Level = 7
Current Forest Level 'Windows2016Forest' is good.

Checking for File Management attribute schema extensions...
-> ccx-FSFAuxiliaryStorage : does not exist
-> ccx-FSFManagedPath : does not exist

Checking for existing File Management class schema extensions...
-> ccx-FSFManagedAttributes : does not exist

One or more schema definitions need extending.

Perform File Management schema extensions? [Y/N]: y

Extending any missing File Management schema...
Successfully added attribute 'ccx-FSFAuxiliaryStorage'
Successfully added attribute 'ccx-FSFManagedPath'
Successfully added class 'ccx-FSFManagedAttributes'
Setting Attribute Security GUID to: cd55682f-3987-446d-a18e-cfd8d53b95f2
Setting Attribute Security GUID to: cd55682f-3987-446d-a18e-cfd8d53b95f2
All File Management schema successfully extended!
Refreshing schema cache...
Press any key to exit
```

6.8 - Granting Access to Managed Storage

For details on the permissions, privileges and group memberships required for management of file shares, see Proxy Rights Group Permissions in the *Senergy Administration Guide*.

6.9 - Installing the Event Monitor

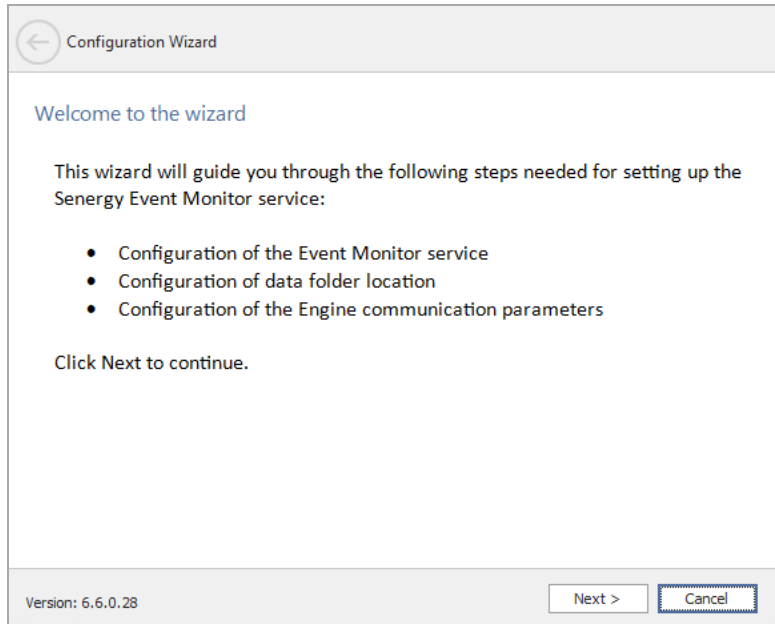
The Event Monitor can be installed on a Windows Server machine that meets the following minimum requirements:

- Microsoft Windows Server 2025
- Microsoft Windows Server 2022
- Microsoft Windows Server 2019 (Member Server)
- At least 4 GB RAM, more maybe required for larger environments
- At least 4 processor cores, more maybe required for larger environments
- Forest functional level 2003 or later in native mode

Other notable information about the Event Monitor:

- There is only one Event Monitor per domain
 - The Event Monitor runs as a service that is configured to start by using the Local System account
 - The Event Monitor must be permitted to make outbound connections through the firewall
1. On the Windows server that will host the Event Monitor, copy to a directory the `Senergy-25.4.iso`.
 2. Mount the `Senergy-25.4.iso` file.
 3. At the root of the `Senergy-25.4.iso` image, double-click `Senergy-Event-25.4-xx.exe`.
 4. When you are asked if you want to run this file, click *Run*.
 5. Agree to the licensing terms and conditions and click *Install*.

6. When notified that the setup was successful, click *Run Configuration Utility*.



The image shows the 'Configuration Wizard' window. At the top, there is a title bar with a back arrow icon and the text 'Configuration Wizard'. Below the title bar, the text 'Welcome to the wizard' is displayed. A paragraph follows: 'This wizard will guide you through the following steps needed for setting up the Senergy Event Monitor service:'. Below this, there is a bulleted list: '• Configuration of the Event Monitor service', '• Configuration of data folder location', and '• Configuration of the Engine communication parameters'. A line of text says 'Click Next to continue.' At the bottom left, the version 'Version: 6.6.0.28' is shown. At the bottom right, there are two buttons: 'Next >' and 'Cancel'.

Configuration Wizard

Welcome to the wizard

This wizard will guide you through the following steps needed for setting up the Senergy Event Monitor service:

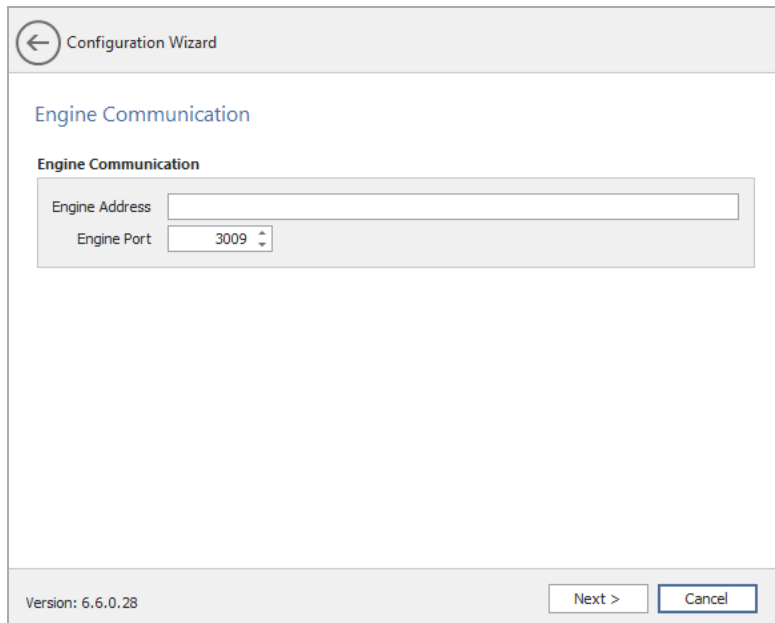
- Configuration of the Event Monitor service
- Configuration of data folder location
- Configuration of the Engine communication parameters

Click Next to continue.

Version: 6.6.0.28

Next > Cancel

7. From the wizard page, read the overview of the setup steps and click *Next*.



The image shows the 'Configuration Wizard' window at the 'Engine Communication' step. The title bar is the same. Below the title bar, the text 'Engine Communication' is displayed. Below that, the text 'Engine Communication' is repeated. There is a form with two fields: 'Engine Address' with a text input box, and 'Engine Port' with a spinner box set to '3009'. At the bottom left, the version 'Version: 6.6.0.28' is shown. At the bottom right, there are two buttons: 'Next >' and 'Cancel'.

Configuration Wizard

Engine Communication

Engine Communication

Engine Address

Engine Port

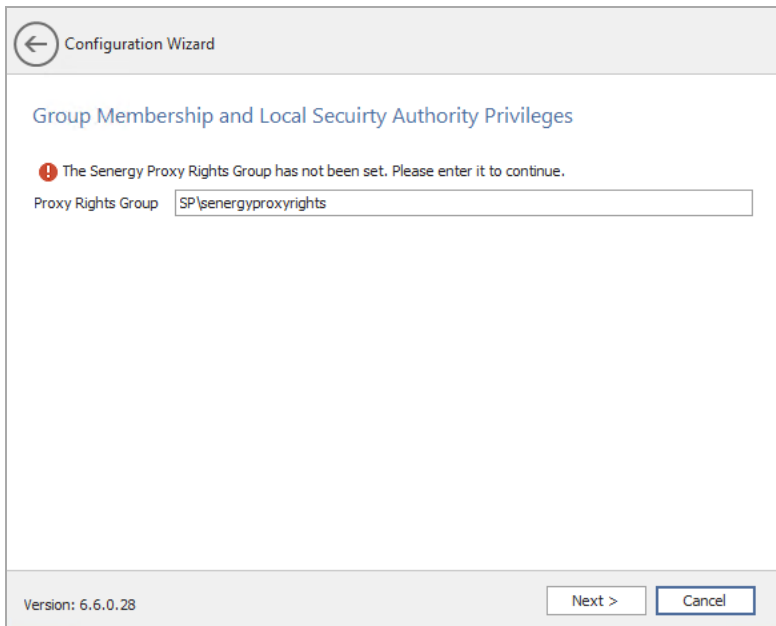
Version: 6.6.0.28

Next > Cancel

8. This page lets you set parameters for the Event Monitor to communicate with the Engine.
9. **Engine Address:** Specify the DNS name or IP address to the server hosting the Engine here.
10. **Engine SSL Port:** Specify the SSL port for the Engine here.

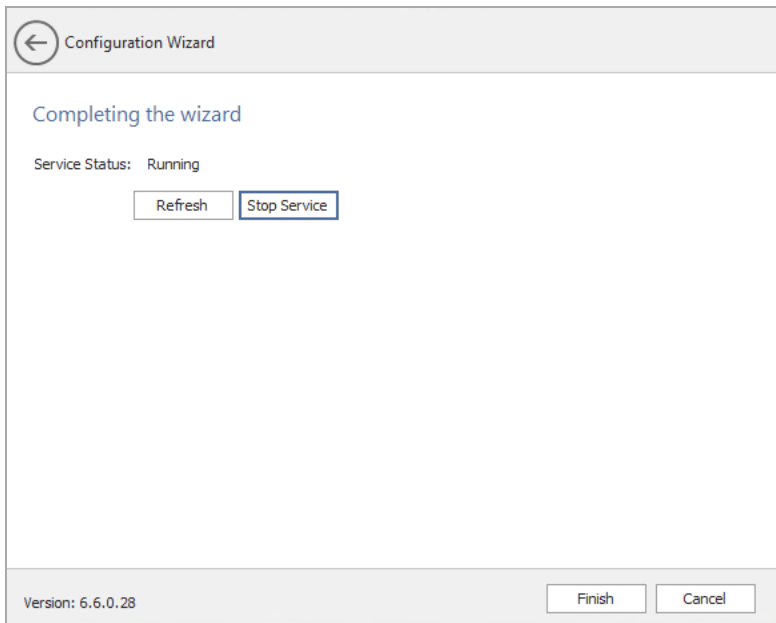
6 - Installing Senergy 25.4

11. Enter the Engine connection settings and click *Next*.



The screenshot shows a 'Configuration Wizard' window with a title bar containing a back arrow and the text 'Configuration Wizard'. The main content area is titled 'Group Membership and Local Security Authority Privileges'. Below this title, there is a red warning icon followed by the text: 'The Senergy Proxy Rights Group has not been set. Please enter it to continue.' Below the warning, there is a text input field labeled 'Proxy Rights Group' containing the text 'SP\seneryproxyrights'. At the bottom of the window, there is a footer bar with the text 'Version: 6.6.0.28' on the left, and two buttons, 'Next >' and 'Cancel', on the right.

12. (Conditional) If you chose a name that was not the default name for the Proxy Rights group, enter the name in the *Proxy Rights Group* field.
13. Click *Next*.



The screenshot shows a 'Configuration Wizard' window with a title bar containing a back arrow and the text 'Configuration Wizard'. The main content area is titled 'Completing the wizard'. Below this title, there is a text label 'Service Status:' followed by the text 'Running'. Below the service status, there are two buttons: 'Refresh' and 'Stop Service'. At the bottom of the window, there is a footer bar with the text 'Version: 6.6.0.28' on the left, and two buttons, 'Finish' and 'Cancel', on the right.

14. Click *Finish*.
15. The Event Monitor is now installed and running. You must still authorize it using the Admin Client. For procedures, see [*Authorizing the Event Monitor \(page 47\)*](#).

6.10 - Installing File System Agents

A File System Agent can be installed on a Windows Server machine that meets the following minimum requirements:

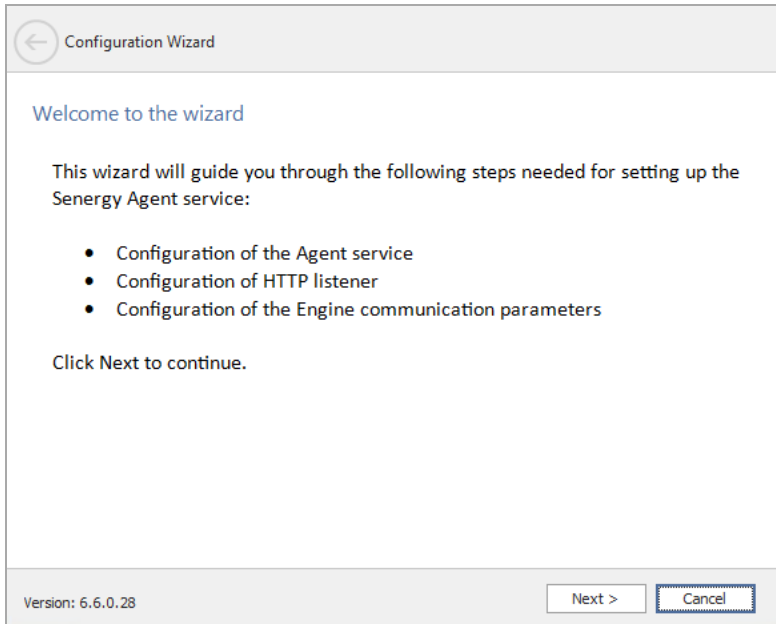
- Microsoft Windows Server 2025 (Member Server)
- Microsoft Windows Server 2022 (Member Server)
- Microsoft Windows Server 2019 (Member Server)
- Microsoft Windows Server 2016 (Member Server)
- At least 4 GB RAM
- For quota management, Microsoft File System Resource Manager (FSRM) must be installed
- See File Server Resource Manager in the *Senergy 25.4 Administration Guide*.

Other notable information about File System Agents:

- A File System Agent runs as a service that is configured to start by using the Local System account
 - The default File System Agent port is 3011
 - A firewall inbound rule for the File System Agent is created during the installation
1. On the Windows server that will host the File System Agent, copy to a directory the `Senergy-25.4.iso`.
 2. Mount the `Senergy-25.4.iso` file.
 3. At the root of the `Senergy-25.4.iso` image, double-click `Senergy-Agent-25.4-xx.exe`.
 4. When you are asked if you want to run this file, click *Run*.
 5. Agree to the licensing terms and conditions and click *Install*.

6 - Installing Senergy 25.4

6. When notified that the setup was successful, click *Run Configuration Utility*.



Configuration Wizard

Welcome to the wizard

This wizard will guide you through the following steps needed for setting up the Senergy Agent service:

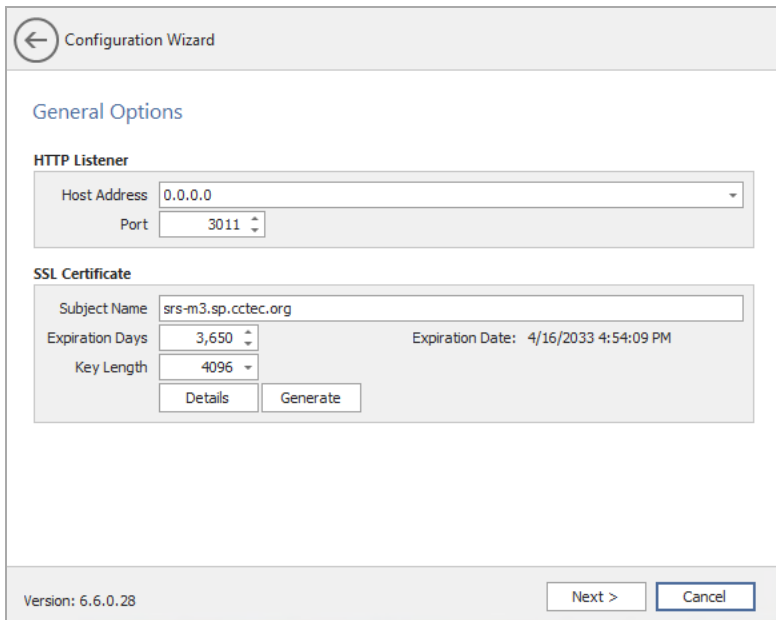
- Configuration of the Agent service
- Configuration of HTTP listener
- Configuration of the Engine communication parameters

Click Next to continue.

Version: 6.6.0.28

Next > Cancel

7. From the wizard page, read the overview of the setup steps and click *Next*.



Configuration Wizard

General Options

HTTP Listener

Host Address: 0.0.0.0

Port: 3011

SSL Certificate

Subject Name: srs-m3.sp.cctec.org

Expiration Days: 3,650

Key Length: 4096

Expiration Date: 4/16/2033 4:54:09 PM

Details Generate

Version: 6.6.0.28

Next > Cancel

8. This page lets you confirm or change basic File System Agent configuration settings.
9. **HTTP Listener:** Communication parameters for the File System Agent.
10. **Host Address:** To listen to all addresses, leave the setting at 0.0.0.0. To limit listening to a specific address, enter the address here.
11. **Port:** The default port is 3011.

12. **SSL Certificate:** Details for an SSL certificate that will be generated.
13. **Subject Name:** The name of the certificate that will be generated. The server name is listed by default.
14. **Expiration Days:** The life span of the security certificate, which is set at 10 years by default.
15. **Key Length:** The SSL certificate encryption setting, which is set at 2048 by default.
16. **Details:** Click the button to view the certificate data.
17. **Generate:** If you modify any of the settings in the SSL Certificate region, click this button to generate a new certificate.
18. Edit any needed parameters settings and click *Next*.

Configuration Wizard

Engine Communication

Engine Communication

Engine Address

Engine Port

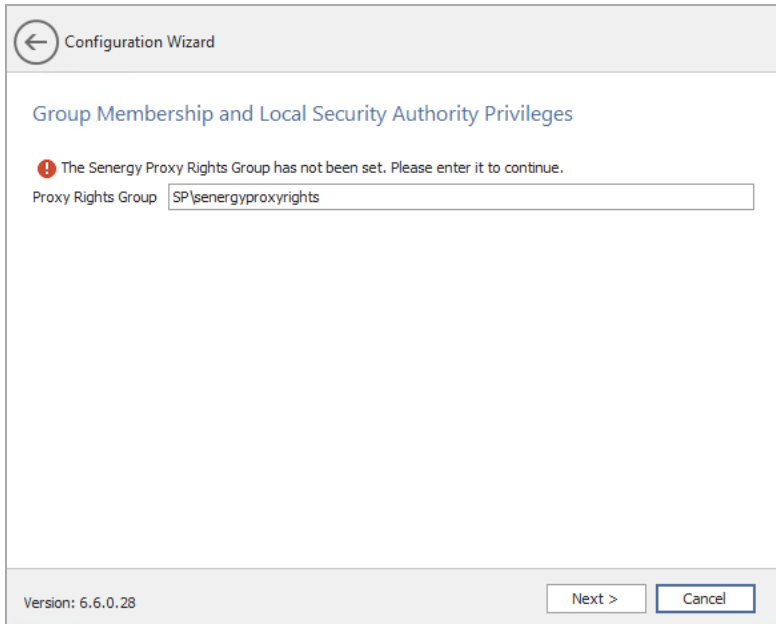
Version: 6.6.0.28

Next > Cancel

19. This page lets you set parameters for the File System Agent to communicate with the Engine.
20. **Engine Address:** Specify the DNS name or IP address to the server hosting the Engine here.
21. **Engine SSL Port:** Specify the SSL port for the Engine here.

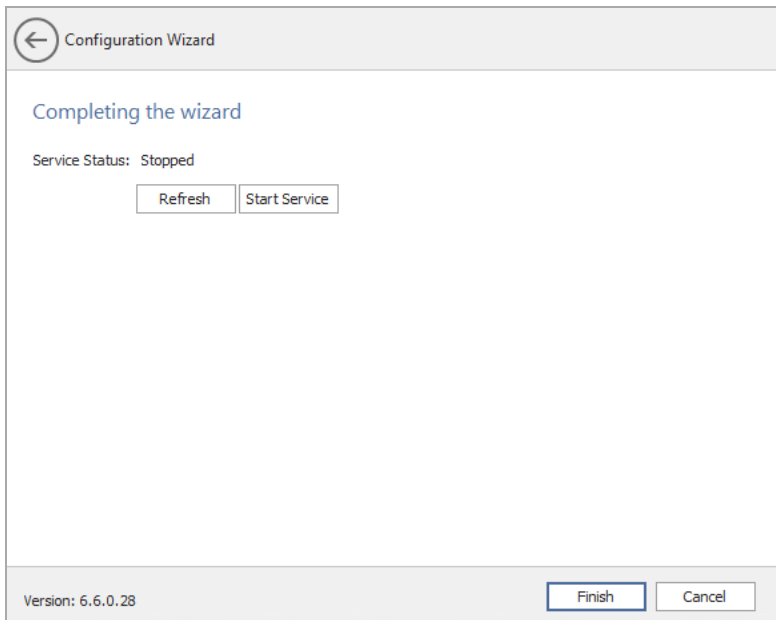
6 - Installing Senergy 25.4

22. Enter the Engine connection settings and click *Next*.



The screenshot shows a 'Configuration Wizard' window with a title bar containing a back arrow and the text 'Configuration Wizard'. The main content area is titled 'Group Membership and Local Security Authority Privileges'. Below this title, there is a red warning icon followed by the text: 'The Senergy Proxy Rights Group has not been set. Please enter it to continue.' Below the warning, there is a label 'Proxy Rights Group' followed by a text input field containing the text 'SP\senergyproxyrights'. At the bottom of the window, there is a footer bar containing the text 'Version: 6.6.0.28' on the left, and two buttons, 'Next >' and 'Cancel', on the right.

23. (Conditional) If you chose a name that was not the default name for the Senergy Proxy Rights group, enter the name in the *Proxy Rights Group* field.
24. Click *Next*.



The screenshot shows a 'Configuration Wizard' window with a title bar containing a back arrow and the text 'Configuration Wizard'. The main content area is titled 'Completing the wizard'. Below this title, there is a label 'Service Status: Stopped'. Below the label, there are two buttons, 'Refresh' and 'Start Service'. At the bottom of the window, there is a footer bar containing the text 'Version: 6.6.0.28' on the left, and two buttons, 'Finish' and 'Cancel', on the right.

25. Click *Finish*.
26. The File System Agent is now installed, configured, and running. You must still authorize it using the Admin Client. For procedures, see [Authorizing the Agents \(page 48\)](#).

6.11 - Installing Phoenix Agents

Phoenix Agents execute the jobs related to Security Policy scans and enforcement as well as Workload execution. A Phoenix Agent must be either deployed on or associated to (via proxy assignment) each server or NAS device where protected high-value targets are located on the network.

A Phoenix Agent can be installed on a Windows Server machine that meets the following minimum requirements:

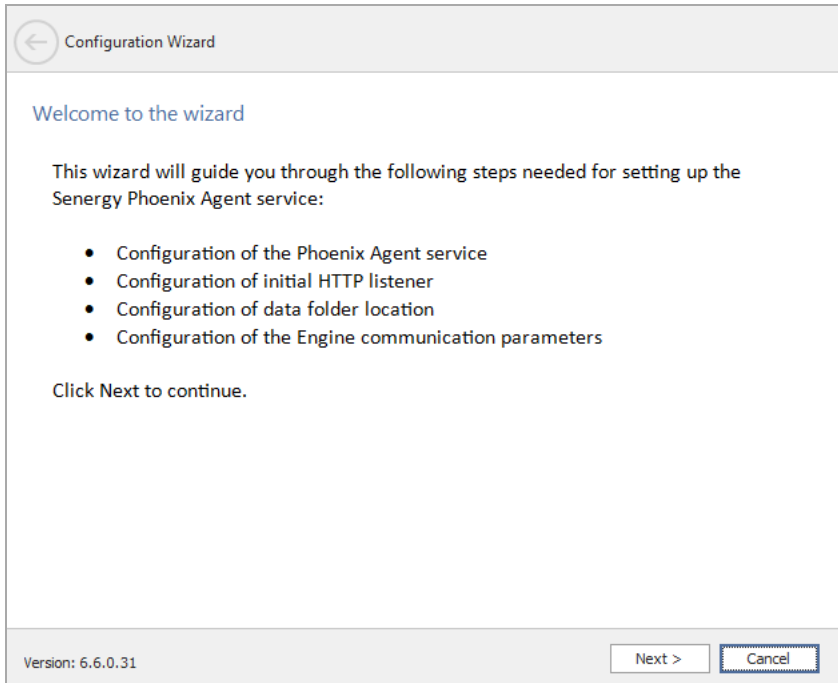
- Microsoft Windows Server 2025 (Member Server)
- Microsoft Windows Server 2022 (Member Server)
- Microsoft Windows Server 2019 (Member Server)
- Microsoft Windows Server 2016 (Member Server)
- At least 4 GB RAM

Other notable information about Phoenix Agents:

- A Phoenix Agent runs as a service that is configured to start by using the Local System account
 - The default Phoenix Agent port is 3013
 - A firewall inbound rule for the Phoenix Agent is created during the installation
1. On the Windows server that will host the Phoenix Agent, copy to a directory the Senergy-25.4.iso.
 2. Mount the Senergy-25.4.iso file.
 3. At the root of the Senergy-25.4.iso image, double-click Senergy-PhoenixAgent-25.4-xx.exe.
 4. When you are asked if you want to run this file, click *Run*.
 5. Agree to the licensing terms and conditions and click *Install*.

6 - Installing Senergy 25.4

6. When notified that the setup was successful, click *Run Configuration Utility*.



Configuration Wizard

Welcome to the wizard

This wizard will guide you through the following steps needed for setting up the Senergy Phoenix Agent service:

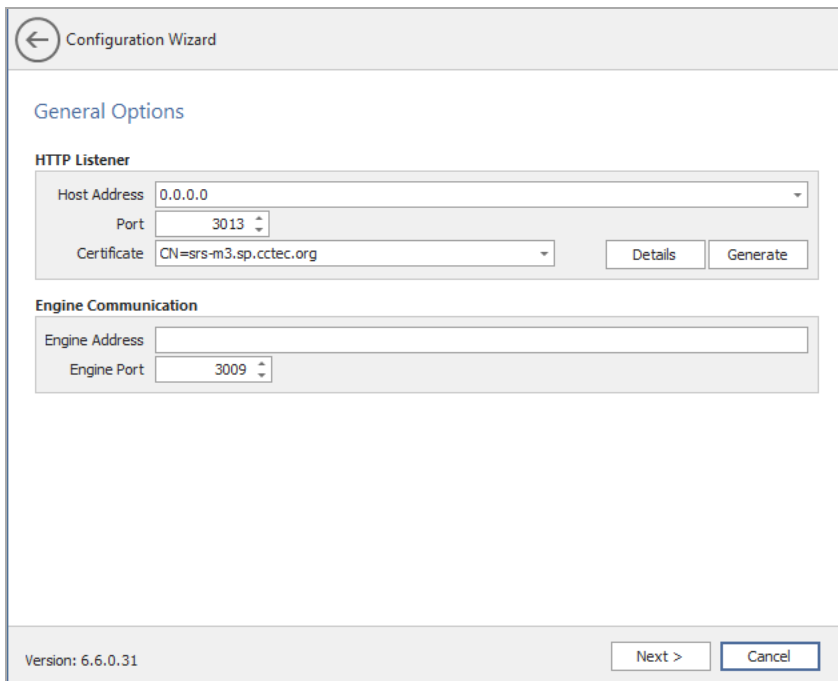
- Configuration of the Phoenix Agent service
- Configuration of initial HTTP listener
- Configuration of data folder location
- Configuration of the Engine communication parameters

Click Next to continue.

Version: 6.6.0.31

Next > Cancel

7. From the wizard page, read the overview of the setup steps and click *Next*.



Configuration Wizard

General Options

HTTP Listener

Host Address: 0.0.0.0

Port: 3013

Certificate: CN=srs-m3.sp.ctec.org

Details Generate

Engine Communication

Engine Address:

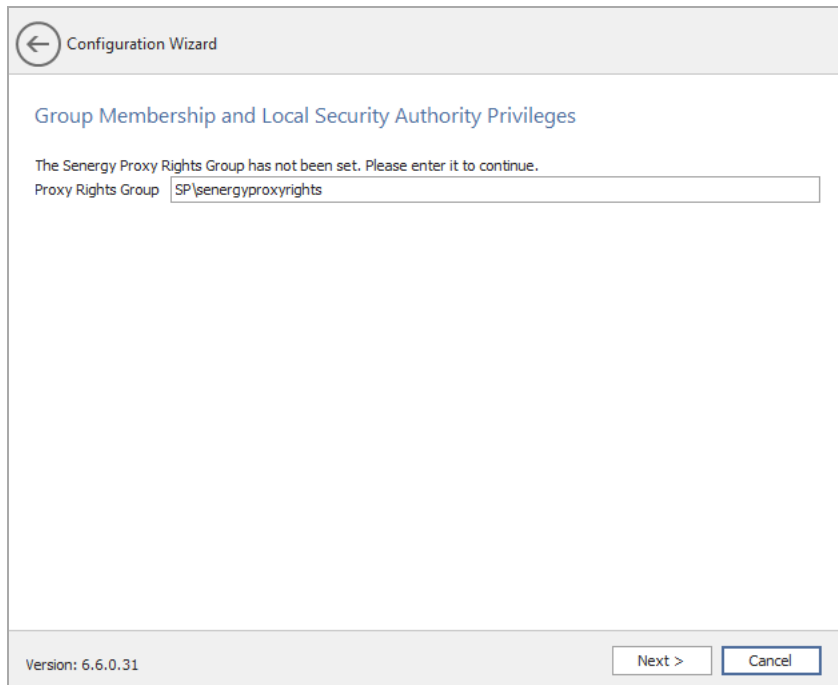
Engine Port: 3009

Version: 6.6.0.31

Next > Cancel

8. This page lets you confirm or change basic Phoenix Agent configuration settings.
9. **HTTP Listener:** Communication parameters for the Phoenix Agent.

10. **Host Address:** To listen to all addresses, leave the setting at 0.0.0.0. To limit listening to a specific address, enter the address here.
11. **Port:** The default port is 3013.
12. **Certificate:** Details for an SSL certificate that will be generated.
13. **Details:** Click the button to view the certificate data.
14. **Generate:** If you modify any of the settings in the SSL Certificate region, click this button to generate a new certificate.
15. **Engine Communication:** Communication information for the Engine host.
16. **Engine Address:** Specify the DNS name or IP address to the server hosting the Engine here.
17. **Engine Port:** Specify the SSL port for the Engine here.
18. Enter the parameter settings and click *Next*.

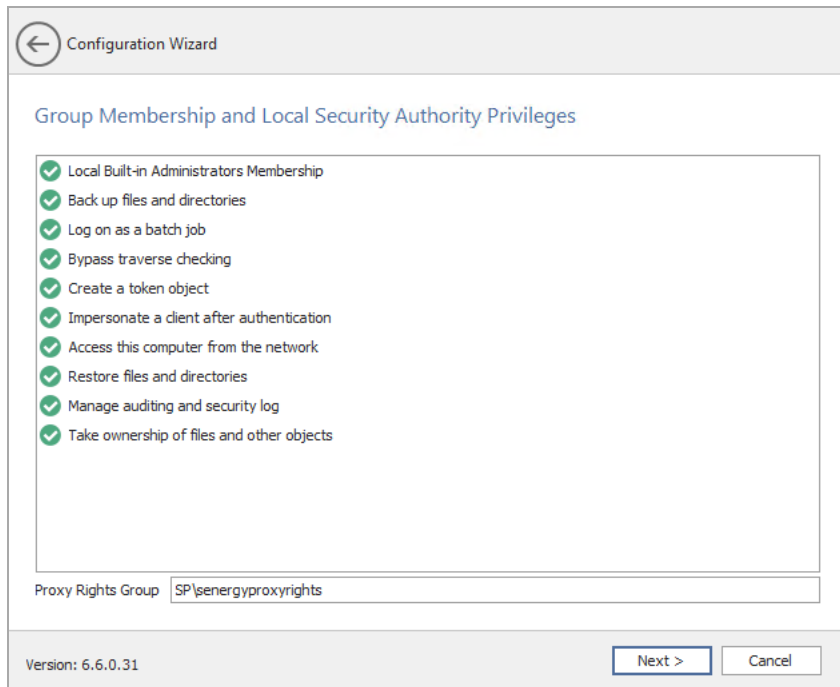


The screenshot shows a 'Configuration Wizard' window. The title bar includes a back arrow icon and the text 'Configuration Wizard'. The main content area is titled 'Group Membership and Local Security Authority Privileges' in blue. Below this, a message states: 'The Senergy Proxy Rights Group has not been set. Please enter it to continue.' There is a text input field labeled 'Proxy Rights Group' containing the text 'SP\seneryproxyrights'. At the bottom left, it says 'Version: 6.6.0.31'. At the bottom right, there are two buttons: 'Next >' and 'Cancel'.

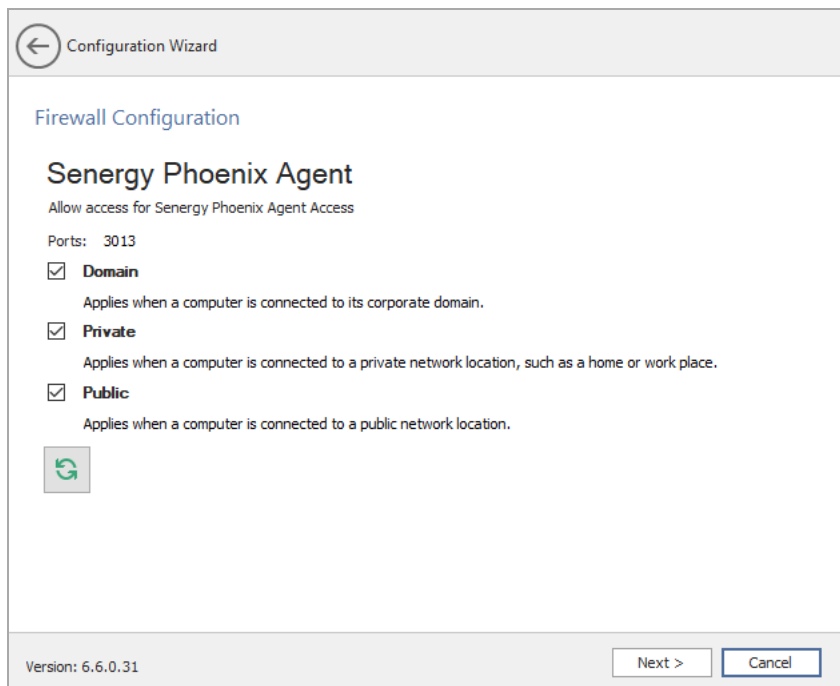
19. (Conditional) If you chose a name that was not the default name for the Proxy Rights group, enter the name in the *Proxy Rights Group* field.
20. Click *Next*.

6 - Installing Senergy 25.4

21. (Conditional) If permissions for the Proxy Rights group have already been established (such as when you upgrading an Agent), the following page will appear:



22. (Conditional) Review the privileges and click *Next*.




23. Set the network profiles according to your organization's security policies and click *Next*.

24. The wizard indicates that the Phoenix Agent service is running.
25. Click *Finish*.

6.12 - Installing the Admin Client

The Admin Client is the administrative interface for Senergy. It can be installed on any Windows platform where .NET 9.0 can run.

1. On the Windows server or workstation where you will run the Admin Client, copy to a directory the `Senergy-25.4.iso`.
2. Mount the `Senergy-25.4.iso` file.
3. At the root of the `Senergy-25.4.iso` image, double-click `Senergy-Admin-25.4-xx.exe`.
4. When you are asked if you want to run this file, click *Run*.
5. Agree to the licensing terms and conditions and click *Install*.
6. When notified that the setup was successful, click *Run Admin Client*.
7. The Admin Client login dialog box appears.



The image shows the Senergy Admin Client login dialog box. It features the Senergy logo (a blue square with a white atomic symbol) and the text "Senergy™" in blue. Below the logo, there are three input fields: "Engine" (a text box), "Port" (a spinner box with "0" selected), "User Name" (a text box), and "Password" (a text box). At the bottom, there are two buttons: "Login" and "Cancel". Below the buttons is a checkbox labeled "Use system proxy settings" which is checked.

8. In the *Engine* field, specify the DNS name or IP address.
9. In the *Port* field, specify the secure port number.
10. The default setting is 3009.
11. Specify the username and password.
12. The user must be a member of the Senergy Admins group to be able to log in.
13. Click *Login*.

6.13 - Authorizing the Event Monitor

1. In the Admin Client, click the *Home* tab.
2. Click *Event Monitors*.

6 - Installing Senergy 25.4

3. Select the listed domain.
4. Click *Authorize*.
5. When you are asked if you want to authorize the selected event monitor, click *Yes*.
6. When the Results page appears, click *Close*.

6.14 - Authorizing the Agents

1. In the Admin Client, click the *Home* tab.
2. Click *Agents*.
3. Select a listed server.
4. Click *Authorize*.
5. When you are asked if you want to authorize the selected event monitor, click *Yes*.
6. When the Results page appears, click *Close*.
7. Repeat Steps 3-6 for all File System Agents and Phoenix Agents.

6.15 - Configuring Storage Resources

Before Senergy can manage and report on your network storage, you must first configure your storage resources and in the process, specify what servers to include for scoping and those to ignore.

1. In the Admin Client, click the *Home* tab.
2. Click *Storage Resources*.
3. In the *Scope* region, browse to locate the containers or servers you want included and drag them to the *Include* frame.
4. If you do not specify the containers or servers to include, Senergy will process all of the servers on your network, which can affect the ability of Senergy to perform management and reporting tasks.
5. (Optional) From the *Include* frame, right click a server and select *Share* to view information on the shares of that server.
6. Click *Save*.
7. When asked if you want to start the update of the storage resources, click *Yes*.

6.16 - Configuring the Data Owner Web Service

When installing Senergy the Data Owner web service is installed as part of the Engine package.

The following section provides procedures for configuring the Data Owner web service.

1. Launch the configuration utility from the Windows start menu: *Start > Senergy > Senergy Data Owner Web Config*.

Setup Wizard

Welcome to the Data Owner Web configuration wizard

This wizard will guide you through the following steps needed for setting up the Data Owner Web service:

- Configuration of the Data Owner Web service
- Configuration of initial HTTP listener
- Configuration of the Engine endpoint
- Configuration of the Data Owners user group

Click Next to continue.

Next > Cancel

2. Click **Next**.

Setup Wizard

Web Service

HTTP Listener

Host Address: 0.0.0.0

SSL Port: 3079

SSL Certificate

Subject Name: srs-m3.sp.cctec.org

Expiration Days: 3,653 Expiration Date: 04/20/2033 17:32:40

Key Length: 4096

Details Generate

Next > Cancel

3. Set any needed parameters for the HTTP Listener.

Host Address: Select an IP address the service will use. To listen on all available IP addresses, select the default *0.0.0.0* entry.

SSL Port: Use the default port 3079 or enter a different one for the web service.

4. Use the default self-signed certificate or click **Generate** after updating the fields:

Subject Name: DNS name used when accessing the service.

Expiration Days: number of days the certificate will be valid

Key Length: specifies the key length for the encryption key



NOTE: While a default self-signed certificate is created, we strongly recommend using a proper certificate issued by a trusted Certificate Authority. See *[Replacing the Self-Signed Certificate \(page 52\)](#)* for details on performing this task.

5. Click Next.

Setup Wizard

Engine

Engine Communication

Address localhost

Port 3009

Next > Cancel

6. Enter the parameters for communicating with the Engine service.

Address: Enter the DNS name or IP address where the Engine service is listening. If the Data Owner web service is on the same server, localhost may be used here.

Port: Enter the port the Engine service listens on. By default this is 3009.

7. Click **Next**.

← Setup Wizard

Data Owners Group

Data Owners Group
 The Data Owners Group is used to provide access to the Data Owner Web service for designated data owners.
 Note that the current logged on user **SP\administrator** will be added to this group.

The group should be entered using Domain\SAMAccount name format where the domain is the current system's domain.

Data Owners Group

Manage Group in AD ☒

☒ Create new group if required

Container [Browse](#)

8. Specify the Data Owners group that provides basic access to the web service. Designated Data Owners must be a member of this group in order to use the Data Owner web service.

Data Owners Group: Enter the name of the group to use or create in Domain\Account name format.

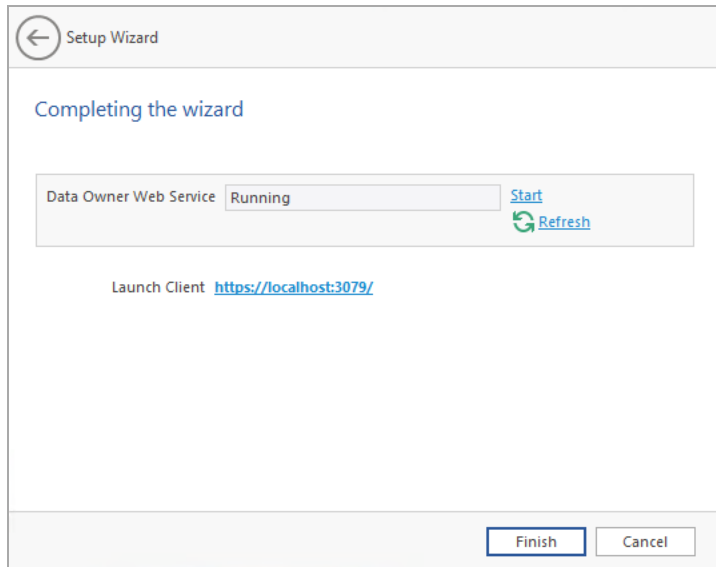
Manage Group in AD: select this to update an existing group or create a new one. If this is selected, the current user will be added as a member to the group.

Create new group if required: select this to create the group if it does not already exist.

Container: click **Browse** to navigate and select the container in Active Directory where a new group if created will be placed.

9. Click **Next**.

6 - Installing Senergy 25.4



10. The Data Owner web service should now start.
Click **Start** if the web service is not yet started.
11. (Optional) Click the **Launch Client** URL to open a browser and access the Data Owner web interface.
12. Click **Finish** to complete the configuration.

6.16.1 - Replacing the Self-Signed Certificate

Overview

The self-signed certificate generated during initial configuration provides a quick means for initial administrator setup. Once setup is complete and any DNS names have been appropriately assigned, we recommend replacing the self-signed certificate with a certificated signed by a trusted authority. Using a certificate issued from a trusted Certificate Authority (CA) reduces end-user confusion when accessing a web site with an otherwise untrusted certificate.

Any SSL/TLS certificate issued from a commercial vendor or an organizational CA is sufficient.

Certificate Requirements

The certificate must be in **PEM** format and should include both the certificate and the private key. Depending on the format of the certificate you acquire, conversion from other formats such **PKCS#12** or **PFX** may be required. Online examples and help for certificate conversion include:

- <https://knowledge.digicert.com/solution/SO26449.html>
- <https://www.ssl.com/how-to/export-certificates-private-key-from-pkcs12-file-with-openssl/>
- General search:
<https://www.google.com/search?q=convert+certificate+pkcs12+to+pem>

An example using the **openssl** command line tool to convert a certificate from PFX to PEM format is shown here:

```
openssl pkcs12 -in my-certificate.pfx -out my-certificate.pem -nodes
```



NOTE: The *-nodes* parameter is required here as the resulting PEM file cannot be password protected.

Updating the Certificate

Once you have a valid PEM file including the certificate and private key that is not password protected, replace the **server.pem** file found on the server hosting the Data Owner web service here:

```
%PROGRAMDATA%\Condrey  
Corporation\Senergy\DataOwnerWeb\config\server.pem
```

Typically this is located at:

```
C:\ProgramData\Condrey  
Corporation\Senergy\DataOwnerWeb\config\server.pem
```

1. Using the Windows services manager, stop the **fsfdataownerweb** service.
2. Replace the **server.pem** file with the updated certificate file, keeping the same name.
3. Restart the **fsfdataownerweb** service.

7 - Administering Senergy

You have now completed the installation of Senergy. For administration procedures, refer to the *Senergy 25.4 Administration Guide*.