

# Install or Upgrade Eggplant DAI on Windows

This section provides step-by-step instructions to install, upgrade and license Eggplant DAI on Windows.

## System Requirements

### Hardware Requirements

- **Operating system:** Windows Server 2019 or 2016 is recommended for production use but Windows 10 is also supported
- **RAM:** 8 GB minimum
- **Disk Space:** 4 GB minimum
- **Processor:** 64-bit Intel 2.3 GHz or equivalent (4+ cores or 8+ threads recommended)

### Port Availability

By default, Eggplant DAI uses 8000 for the main DAI Server. For information on changing ports after installation, see [Change the Eggplant DAI Port on Windows](#).

In addition, the following ports must be available: 4566-4568, 4589, 4650, 5433, 5558-5566, 5673, 9000, 15673, 15675.

### Supported Browsers

- Google Chrome 95 and later
- Mozilla Firefox 93 and later
- Safari 15 and later

## Standard and Advanced Installations

You can either run a standard or advanced Windows installation for Eggplant DAI. The advanced installation allows you to do some additional configuration:

- Update the default port setting and configure HTTPS
- Choose the directory where PostgreSQL data is stored
- Choose the directory where your Eggplant Functional suites are stored.

Follow the steps in [Start Your Installation](#) for both types of installation and then jump to the appropriate section.

## Install Eggplant DAI 6.0

The Eggplant DAI 6.0 Windows installation supports:

- Fresh installations
- Upgrades from DAI 5.3.

### IMPORTANT

If you're upgrading from Eggplant DAI 5.3, make sure that you take a backup of your files and data before you start your installation.

To take a backup:

1. Stop the **Digital Automation Intelligence Service** through the Windows Services manager.
2. Open `C:\ProgramData\Eggplant\Digital Automation Intelligence` and transfer the `data` and `minio` folders outside of the `ProgramData` directory to another machine or backup device.

If you need to reinstall after upgrading to DAI 6.0, do another backup and then restore your original files.

1. Repeat steps 1 and 2 above to make a backup of the DAI 6.0 files and data, which may be useful for troubleshooting.
2. Stop the **Digital Automation Intelligence Service** through the Windows Services manager.
3. Open `C:\ProgramData\Eggplant\Digital Automation Intelligence` and overwrite the `data` and `minio` folders with your original backed up versions from DAI 5.3.

# Start Your Installation

Use these instructions for a fresh installation or to upgrade from DAI 5.3.

1. [Download the Eggplant DAI installation file.](#)
2. Double-click the installation file to launch the **Setup** wizard. Click **Next** to continue.

## NOTE

You might be asked to uninstall Eggplant AI if you haven't done so already.

3. Keep the default installation directory: `C:\Program Files\Digital Automation Intelligence` or click **Browse...** to choose a different location.
4. On the **Advanced installer Options** screen, either
  - Click **Next** to do a [standard installation](#).
  - Select the **Run Advanced Install Configuration** to do an [advanced installation](#).

## Run a Standard Install

**Prerequisites:** Complete all steps in [Start Your Installation](#).

1. On the **Server & Administration Settings** screen, enter the:
  - **DAI Server Hostname:** Hostname of your main DAI server, which will appear in the URL of your Eggplant DAI environment. Do not include the `http://` or `https://` prefix in the hostname.
    - If the server is your local machine, enter `localhost`, which means Eggplant DAI can only be accessed from this machine at `http://localhost:8000`.
    - If you need to access the DAI server from other, remote machines, enter a fully qualified domain name, e.g. `www.serverhostname.com`. This allows you to access Eggplant DAI from a browser at, e.g. `http://<serverhostname>:8000`.

## TIP

To find the hostname of your server, go to **Settings > System > About**.

- **System Administrator** details: Credentials for an administrator of Eggplant's identity access management system (IAM).

- **Username:** Enter only **ASCII printable characters** *excluding* `< > \ / { } " "` and uppercase letters.
- **Password:** Enter between 12 and 128 characters using **ASCII characters** *excluding* `\ { } "`.

**! IMPORTANT**

Keep the credentials for the System Administrator account in a safe place. Under certain circumstances, an Eggplant Technical Consultant might ask you to find and use them.

- **DAI Administrator** details: Credentials and personal details for the DAI administrator.
  - **Username:** Enter only **ASCII printable characters** *excluding* `< > \ / { } " "` and uppercase letters.
  - **Password:** Enter between 12 and 128 characters using **ASCII characters** *excluding* `\ { } "`.

**i NOTE**

You'll need your DAI Administrator credentials to log into Eggplant DAI for the first time, and to create or update other users. When you've logged in, you can update your password to include the excluded characters listed above along with other languages and characters, e.g. unicode. Administrator usernames cannot be updated.

2. Click **Next** to continue to the **SMTP Server Settings** screen.
3. If you work in a secure environment without access to email, clear the **SMTP Enabled** checkbox and click **Next**, and then jump straight to step 5. Otherwise, leave the **SMTP Enabled** checkbox selected and continue to the next step.
4. Enter details for your SMTP mail server:
  - **SMTP Server Hostname:** Hostname of the SMTP server that you want to use to send emails in Eggplant DAI, e.g. `smtp.yourserver.com`.
  - **Port:** Port number that Eggplant DAI can connect to on the SMTP server.
  - **Username** and **Password:** Credentials for an account on your SMTP server.
  - **From Address:** Email address that appears in the SMTP-header for emails sent within Eggplant DAI.

- **Enable SSL, Enable StartTLS, Enable Authentication:** Select the methods by which you would like to secure the connection to your SMTP server.

**! IMPORTANT**

Check your SMTP settings carefully. If you enter incorrect details, you may need to contact an Eggplant Technical Consultant to complete your installation.

5. Click **Next** to continue to the **Select Start Menu Folder** screen.
6. Either accept the default setting or click **Browse...** to choose another location for the shortcut to Eggplant DAI.
7. Click **Next** to continue to the **Ready to Install** screen, and when you're ready, click **Install** to start the installation.
8. When the setup is complete, click the **Finish** button and wait 10 minutes to make sure that all migration activities are complete. Do not switch off your computer.
9. Continue to [First Log in and Licensing](#)

## Run an Advanced Install

### Prerequisites:

- Complete all steps in [Start Your Installation](#).
- To configure HTTPS for your Eggplant DAI server, you'll need a trusted certificate and key. A trusted certificate is issued by a Certificate Authority listed on the Mozilla page:
  - **PEM format TLS certificate:** For a list of valid certificates, see the [Mozilla](#) page.
  - **PEM format SSL key:** All key formats that are accepted by [nginx](#).

**i NOTE**

In a Windows environment, the certificate can be signed by another Certificate Authority providing it is installed as a Trusted Root Certification Authority on the machine that is running the browser or agent.

If you choose to use a self-signed SSL certificate, you must update your configuration after installation. Set the:

- *Issuer* to the organisation that is issuing the certificate, e.g. `"yourcompanyname"`

- *Subject* to the hostname that the certificate has been generated for, e.g. `"local.dai.com"`, which *must* match the hostname that you entered during installation.

To be accepted by Chrome and Firefox, the end entity certificate must set the Subject Alternative Name and Authority Key Identifier fields. Use a hash function that is cryptographically strong enough. `sha512` is currently acceptable.

1. On the **PostgresSQL Data Directory** screen, either:

- Click **Next** to accept the default path.
- Click **Browse** to choose a different directory. For example, go to `C:\eggplantAI\pgsql` to use the Postgres data directory that was left behind after uninstalling Eggplant AI 3.1.

2. Click **Next** to continue to the **Server Port & HTTPS** screen.

3. Keep the default port value: `8000` unless this port is unavailable and you need to use an alternative. You can always update this after your installation.

**i NOTE**

Port `80` is not currently supported for either HTTP or HTTPS configurations.

4. If you don't want to configure HTTPS to secure your DAI server, clear the **Use HTTPS** checkbox, click **Next**, and then jump straight to step 6. Otherwise, leave the **Use HTTPS** checkbox selected and continue to the next step.

- If port 8000 is available, leave the default value.
- If port 8000 is not available, enter the HTTP port you want to use.

5. Add your certificate details:

- **HTTPS Certificate:** Browse to and select your HTTPS certificate.
- **HTTPS Private Key:** Browse to and select your HTTPS key file.
- **(Optional) Private key requires password:** Select this option if your private key needs a password to unlock it, and then browse to and select your password file.

6. Click **Next** to continue to the **Usage Statistics** screen. Leave the checkbox selected to allow Eggplant to collect these metrics for a usage report:

- Product Identifier
- Product Version
- Host OS
- Host OS Version
- License (Serial Number) information.

7. Click **Next** to continue to the **Suites Data Directory** screen, either:

- Click **Next** again to accept the default path.
- Click **Browse** to choose a different directory for your Eggplant Functional suites. This is the directory that the [agent uploads your suites](#) to and might be different from where you're currently storing them.

8. Complete all the steps in the [standard installation](#).

## First Login and Licensing

When Eggplant DAI is installed and running, you must access the application from a browser. Follow these steps to log in, license and start to use Eggplant DAI.

### ! IMPORTANT

**Upgrades from 5.3:** To ensure that policy requirements are met, all passwords for existing user accounts are reset as part of the migration to Eggplant's new identity and access management system.

- If during installation, you configured an SMTP mail server, this is an automatic process. Existing users with valid email addresses receive an email that contains a link to update their password. The link expires after 12 hours.
- If you work in a secure environment, without email, you'll need to [set a temporary password](#) for all user accounts.

Additionally, all usernames are reset to lowercase.

1. Enter the appropriate URL from a browser to display the login screen:

- If you added the hostname `localhost` during installation, launch the browser from the computer on which the Eggplant DAI server is running and enter `http://localhost:8000`.

- If you added a fully qualified hostname during installation, you can access the Eggplant DAI server from a remote machine. Launch a browser and enter `http://<serverhostname>:8000`.

2. Eggplant DAI prompts you to log in. Enter the username and password for the DAI Administrator account that you setup during installation, and click **OK**.
3. In the License page that opens, enter your **License Key** and click **Agree**. A copy of the Eggplant Software License agreement can be read and downloaded before clicking **Agree**. You can generate your license in the [Greenhouse Licensing Web Portal](#). After your license is accepted, the **Access** page is displayed for you to make updates to user accounts.
4. Click **Manage users** to open the Admin Console in a new browser tab.
5. Search for your username and then select the ID of the correct record to edit it.
6. Enter your email address and select **Save**.
7. Go to the [Managing Users](#) section to learn more about the new administration environment for DAI 6.0 or [Getting Started](#) if you're using the application for the first time.

## Greenhouse Licensing Web Portal

As an Eggplant customer, you have access to the [Greenhouse](#) licensing web portal, where you can review and create available license keys as well as download generated licenses for your account.

### NOTE

When you're generating a license key in Greenhouse, copy the physical address of the machine where Eggplant DAI is installed into the **Host ID** field.

You can also use this portal to submit questions to support and view information about any support cases.

You should receive your initial Greenhouse login information from your account manager. If you don't have a password, you'll need to contact your account manager or [sales@eggplant.io](mailto:sales@eggplant.io). If you need an Eggplant DAI license, contact your account manager or Eggplant Support.

## Add Settings for Self-Signed SSL Certificates



If you've completed an [advanced installation](#) and used your own Certificate Authority to sign an SSL certificate, then you must update your configuration after installation.

1. Stop the **Digital Automation Intelligence Service** through the Windows Services manager.
2. Go to `C:\ProgramData\Eggplant\Digital Automation Intelligence\config.yml` and open the `.yml` file in a text editing tool.
3. Add the following entries and save your file:

`config.yml`

```
NODE_EXTRA_CA_CERTS: <path to the root Certificate Authority
certificate>
REQUESTS_CA_BUNDLE: <path to the root Certificate Authority
certificate>
```

4. Restart the **Digital Automation Intelligence** Windows service.

## Change the Eggplant DAI Port on Windows

Although Eggplant DAI assigns port 8000 by default during installation, you can specify a different port later:

1. Stop the **Digital Automation Intelligence Service** through the Windows Services manager.
2. Repeat an [advanced installation](#) and in steps 3 or 4, depending on your configuration, enter a new port value.
3. When the installation is complete, restart the **Digital Automation Intelligence** Windows service.