



Version 7
Implementation Guide

Pre-Installation Configuration

Welcome to KnowledgeSync!

Welcome KnowledgeSync, the industry's leading Business Activity Monitoring (BAM) technology. This guide is designed to help you install and initially configure the KnowledgeSync solution.

For complete instructions on every KnowledgeSync function, from query and event designing to report distribution, email response, and webcast set-up, please refer to the KnowledgeSync Reference Guide.

If you are installing the KnowledgeSync Professional Edition, please refer to the User's Guide for that version of KnowledgeSync, as its installation and configuration steps are different from those detailed here.

Help Us Help You

Since there are over 4,000 organizations using KnowledgeSync, our Technical Support department does its best to prioritize incoming support requests and you can help us out in this regard.

If you know what day (or days) that you will be installing and configuring KnowledgeSync, please take a moment to send an email to our Support department with this information in it. This way, if our Support staff sees an incoming support request from you on one of these days, your queue priority will be raised in an effort to get back to you as soon as possible.

If you do need to contact Vineyardsoft Support, you may do so via either telephone or email (contact information is at the end of this guide). Please provide as much detail as possible in your email message or voicemail message (if asked to leave a message) so that our staff will be best able to assist you.

Choose the KnowledgeSync Server

Before you download KnowledgeSync, you should decide which server (or workstation) KnowledgeSync will be installed on. Here are the general rules regarding the selection of the KnowledgeSync server:

- ❖ KnowledgeSync does not need to be installed on its own server.
- ❖ KnowledgeSync does not need to be installed on the same server as your database(s). As long as KnowledgeSync can access your application's data via ODBC, it can be installed anywhere on your network. (Local network installation is preferred).

Hardware Requirements

Platform:	MS Windows NT, 2000, 2003, XP, Vista, and Windows Server 2008
Memory:	128MB
Processor:	Pentium 290 (or greater)
Disk Space:	(For installation) 64 MB
Disk Space:	(For the application) 32 MB

	<u>Minimum 2 connection</u>	<u>Recommended 2 Connection</u>	<u>Minimum Unlimited</u>	<u>Recommended Unlimited</u>
CPU	1.0GHZ/1	1.2GHZ/1	1.2GHZ/1	1.8GHZ/2
RAM	256MB	512MB	512MB	1 GB
HD	20GB	30GB	30GB	50GB

Software Requirements

If you plan on configuring KnowledgeSync to integrate with your Microsoft Outlook (Exchange) based email system, you will need to have either Microsoft Outlook or Microsoft Office Pro (which includes Microsoft Outlook) installed on the KnowledgeSync server. Note that the Microsoft Outlook installation must include the installation of a Microsoft component called "CDO" (collaboration data objects).

KnowledgeSync does not need to be installed on the same server as your database(s). As long as KnowledgeSync can access your application's data via ODBC, it can be installed anywhere on your network (local network is preferred).

KnowledgeSync may be configured to use either a Microsoft Access or a Microsoft SQL Server database. If you plan on using an Access database, you do not need to have Microsoft Access installed on the KnowledgeSync server. If you plan on using a SQL Server database, you do need to have MS SQL Server 2000 (Enterprise or Standard) with Service Pack 4 or above, SQL Server 2005 with no service packs required, SQL Server Express Edition 2005 (formerly known as MSDE), or SQL Server 2008.

If you plan on using SQL Server Express, you will need to download and install the (free) SQL Server Express database from the Microsoft Windows website.

(Note also that each of KnowledgeSync's servers (e.g., the application event server, the email server, the fax server, etc.) will use its own SQL Server login, so the SQL Server version is best utilized by those organizations that license SQL Server per "server" and not per "user".)

Create KnowledgeSync Service Account

Since KnowledgeSync runs as a “Service”, your first step is to create a Windows username (account) under which the KnowledgeSync service will run.

This **should** be an account with **local admin** rights on the KnowledgeSync server. You may wish to create an account called something like “Ksync”.

KnowledgeSync should not be run using the “Local System Account”; however, if your KnowledgeSync configuration is not writing data back into application databases and you wish to use the Local System Account, it may be possible for you to do so. Please contact Vineyardsoft’s Support department if you need to configure KnowledgeSync in this manner.

It is suggested that you make the KnowledgeSync Service account a **domain user**; if you plan on using KnowledgeSync to send or receive email via Microsoft Exchange, this account **must** be a domain user.

Make sure you explicitly add the KnowledgeSync User account to the “Power Users” Group.

If local admin rights are not possible, you should give the KnowledgeSync user account the following minimum rights:

- Act as part of the operating system
- Create a token object
- Create global objects
- Create permanent shared objects
- Lock pages in memory
- Log on as a service
- Log on locally

Identify Your Email “Type”

Before you install KnowledgeSync, you need to decide what “type” of email system KnowledgeSync will be using to send (and optionally receive) email messages.

You should configure KnowledgeSync to use an email type of **Internet** if:

- You use SMTP to send email messages
- You wish to send email messages in HTML format

You should configure KnowledgeSync to use an email type of **Exchange** if:

- You use Microsoft Outlook to send email messages
- You use Exchange and your server uses SSL (secure sockets layer)

You should configure KnowledgeSync to use an email type of **Vim** if:

- Your organization uses Lotus Notes to send email messages

You should configure KnowledgeSync to use an email type of **Mapi** if:

- You wish to send email messages from a stand-alone PC (this setup is detailed in the KnowledgeSync Reference Guide)

Internet (SMTP) Account Preparations

SMTP information is used for configuring KnowledgeSync's outgoing email integration; POP3 information is used for configuring KnowledgeSync's ability to monitor incoming email messages.

Make sure that you have the following information at hand:

- The POP3 server name
- The POP3 IP address
- The SMTP Server name
- The SMTP IP address
- A valid email account

Note also:

- “Relay” must be turned on if you plan on using KnowledgeSync to send mail outside of your domain.
- Authentication is not currently supported in KnowledgeSync

Exchange (Outlook) Account Preparations

To integrate KnowledgeSync with Microsoft Exchange, Microsoft Outlook must be installed on the KnowledgeSync server. After you install (or confirm the installation of) Outlook, you should create an email account to be used by KnowledgeSync.

Follow these steps:

- 1) Create an Outlook “Profile” to be used by KnowledgeSync
- 2) Create the Outlook Mailbox
- 3) Make sure that the Profile has access to the mailbox
- 4) Verify that CDO (Collaboration Data Objects) is installed. You can verify this by running the server's “Add/Remove Programs” option and selecting either MS Office or MS Outlook. Click on the “Change” button to see if CDO is installed. If it is not installed, choose the option to install it.

Lotus Notes Account Preparations

KnowledgeSync supports Lotus Notes Mail only if POP is not enabled.

Follow these steps:

- Make sure the Lotus Notes Client components are installed on the KnowledgeSync server and are accessible by the KnowledgeSync service.
- Decide which user account KnowledgeSync will use for sending email and install the Lotus Notes client components for that user.

Make sure that the installed Lotus Notes folder is included in the “PATH” variable (usually C:\Lotus or c:\Notes)

If you are unsure of the username of the Lotus Notes mailbox to use, scan your system for a file called “Lotus.ini” (or any similar file) and review the contents of the file. You should see information within it naming the Lotus Notes user account.

Test E-Mail Account

After identifying or configuring any of the preceding email accounts, make sure that you test the account to ensure that you can send and receive email messages from it.

Be sure that you test sending a message to addresses both within and outside of your organization’s domain.

KnowledgeSync Installation (Server)

After configuring the KnowledgeSync Service account and identifying the type of email system KnowledgeSync will be using, you are ready to download and install KnowledgeSync on your server.

The installation of a KnowledgeSync “Client” is detailed in a subsequent chapter.

Log in to the KnowledgeSync Service Account

In the preceding chapter, you created an account for the KnowledgeSync Service.

Log out of your current session, and log back in using that account.

Whenever you need to perform KnowledgeSync maintenance, you should first log into this account and then perform the required maintenance.

Download KnowledgeSync

Regardless of whether you are installing KnowledgeSync for the first time or are upgrading KnowledgeSync, you should download KnowledgeSync from the Vineyardsoft Web site:

<http://www.vineyardsoft.com/html/download.html>

Fill out the download form and you will be shown information on where and how to download the appropriate files. There is a single “KnowledgeSync Setup” file (KS_Setup.exe) regardless of your operating system and regardless of whether it is a new installation or an upgrade.

Install KnowledgeSync (New Install)

After you download the “KS_Setup.exe” file, run this file to begin the installation of KnowledgeSync. You will be prompted to specify the installation password, which was emailed to you at the time you downloaded the KnowledgeSync setup file.

See “KnowledgeSync Components to Install” for additional installation information.

Once the installation is completed, please refer to the section titled “Configure KnowledgeSync Service”.

KnowledgeSync Components to Install

The KnowledgeSync components are:

- **Core Components:** These components are always installed.
- **Server Components:** These components (including the KnowledgeSync database) are installed on the KnowledgeSync server.
- **Client Components:** These components are what allow a user to access and maintain the application. These components are always installed on the KnowledgeSync server and may be installed on remote systems from which KnowledgeSync access is desired.

By default, all three components are installed. You should modify this only if you wish to install the client components on a remote system.

Note the following:

- Do **not** select “Feature will be installed when required” for any component.
- If you wish to install a specific component set, make sure that the option “Will be installed on local hard drive” is selected.

Upgrade KnowledgeSync (Existing Install)

If you already have KnowledgeSync installed, you may wish to upgrade it to the most current version. The current version of KnowledgeSync is displayed on the KnowledgeSync Download page.

To see what version of KnowledgeSync you currently have installed, log into any KnowledgeSync module, click on the “Help” menu and then on the “About” option.

To upgrade KnowledgeSync, follow these steps:

- Back-up your KnowledgeSync data files
- Un-install KnowledgeSync (this will leave your data files intact)
- Install the new version in the same location as the previous version.
- (If you are currently running a KnowledgeSync version prior to V7.x and you will be upgrading to version V7.x or higher, you **must** (after installing the new version) next select the option called “Upgrade Earlier Version Database to V7”. This option is located in the KnowledgeSync Programs Group.)
- Once these steps are complete, you should decide whether you wish to host the KnowledgeSync database under Microsoft Access or under Microsoft SQL Server. If you opt for MS Access, your upgrade is complete. If you opt for MS SQL Server, please follow the steps detailed the section titled “Migrating to SQL Server”.

Note that when you uninstall KnowledgeSync, the username and password that the KnowledgeSync Service is removed. To re-enter this information, log into the KnowledgeSync Administrator, go to the “Activity” folder, and click on the “Server Status” folder. You may then select the toolbar option “Server Login Information”.

Installation Error “Cannot Find Table ‘ES’”

If you get the error "The Microsoft Jet database engine cannot find the input table or query 'es'" when you try to open a KnowledgeSync Event, your upgrade procedure was not completed successfully. This is corrected by following these steps:

- 1) Stop the KnowledgeSync Service and exit from all KnowledgeSync modules.
- 2) Select the option in the KnowledgeSync Programs menu called 'Upgrade earlier version to V5.'
- 3) Start the KnowledgeSync Service.

If you experience further problems, please contact Vineyardsoft’s Customer Support department.

Configure KnowledgeSync Service

Your last step in this chapter is the configuration of the KnowledgeSync Service.

- Log in to the KnowledgeSync server, go to the “Control Panel”, and then to “Admin Tools”, and then select the “Services” option.
- Right-click on the KnowledgeSync service, select “Properties”, and click on the “Logon” tab.
- Select the “This Account” option.
- Click on the “Browse” button and select the KnowledgeSync Service account that you created earlier.
- Click on the “Check Names” button to validate the name you selected.
- Click on OK to return to the previous window and then click on “OK” again.
- Set the “Startup type” to “Manual” and start the KnowledgeSync Service.
- Verify that you can start and stop the KnowledgeSync Service without error. Errors are displayed in a dialogue box as well as in the Event Viewer.
- Stop the KnowledgeSync Service. For the next steps, you will be using the KnowledgeSync “Desktop” Service as it will display any configuration problems the Service might have.

When finished, you will reset the KnowledgeSync Service to “Automatic”.

Migrating to SQL Server

You have the option to host the KnowledgeSync database under either MS Access (the default) or MS SQL Server.

Note that KnowledgeSync supports SQL Server Express (formerly known as MSDE). If you plan on using SQL Server Express, you will need to download and install the (free) SQL Server Express database from the Microsoft Windows website.

If you wish to host the KnowledgeSync database under SQL Server, follow these steps:

- Install the KnowledgeSync application on your server
- Open the KnowledgeSync Programs group and select the option to “Migrate Database to SQL Server”.

Note: The option to migrate the KnowledgeSync database **must** be taken from the KnowledgeSync server; it cannot be run from a remote KnowledgeSync client.

Before migrating your database to SQL Server, make sure that you have the following two pieces of information:

- 1) Which SQL Server name (instance) you wish to migrate to.
- 2) A SQL Server username and password that has the privileges to create and to alter a database

Note that the migration program, once successfully executed, will not be able to be run again on the same KnowledgeSync database.

If You Are Migrating a New Installation

If you are migrating a new installation of KnowledgeSync and are using an evaluation license code, you may take the “Migrate” option and your evaluation license code will continue to work in the SQL Server version.

If You Are Migrating an Existing Installation

If you are migrating an existing installation of KnowledgeSync, the migration program will check to see if you have a valid Version KnowledgeSync license code. If a license code is not located, the migration program will abort with a message instructing you to contact your Business Partner (or Vineyardsoft) to acquire a valid KnowledgeSync license code.

Do NOT Delete the Access Databases

If you are running KnowledgeSync under SQL Server, please do **not** delete any of the Microsoft Access databases that KnowledgeSync installs by default. Although KnowledgeSync will not use those databases to store any application data, their presence is required as part of the audit trail used by the KnowledgeSync application.

Schedule Your SQL Database Backup

If you are running KnowledgeSync under SQL Server, it is essential that you make sure that this database is being backed-up as part of your nightly (or periodic) backup of your other SQL Server application databases.

Note that unlike the MS Access version of KnowledgeSync, the MS SQL Server version of KnowledgeSync does not automatically create backups of its own database; this must be configured and scheduled through the standard Microsoft SQL Server Backup Utility.

Reset SQL Server Database Location

[Applicable only if you are hosting the KnowledgeSync database in MS SQL Server.]

In some cases, you may encounter the need to “reset” the information about where the KnowledgeSync database is located. The reasons for needing to do this are:

- ❖ If your KnowledgeSync server has gone down and you wish to re-install the KnowledgeSync application on another server
- ❖ If you rename your KnowledgeSync server
- ❖ If you change the username or password of the SQL Server account that KnowledgeSync uses to log into SQL Server

If you do any of these above items, you will need to take the option called “Reset Database Location” from the KnowledgeSync Programs group. When you take this option, you will be prompted to confirm the SQL Server instance name that KnowledgeSync will be connecting to, along with the username and password of the account that KnowledgeSync will use for accessing its database.

Email Configuration

Since KnowledgeSync can send out alert messages via email as well as monitor incoming email messages, one of the most important configuration steps is to define the integration between KnowledgeSync and your email system.

Email Account Setup

To configure the KnowledgeSync email account, follow these steps:

- Log into the KnowledgeSync server. Make sure you log under the account that the KnowledgeSync Service uses.
- Log into the KnowledgeSync Administrator module. The default login info is username “Admin” and no password.
- Select the branch called “Software Setup”.
- Select the sub-branch called “Email Accounts”.
- Click on the “New Email Account” button at the top-left of the window.

Please refer to the email account information that you identified in chapter 1 of this guide as you go through the following steps.

Internet (SMTP) Account Setup

If you are running an Internet-based email system, follow these steps:

- Choose email type “Internet”.
- Key in an email account description, such as “KnowledgeSync Alerts”.
- Specify the SMTP login username and password.
- Leave the postoffice field blank.
- Place a checkmark in the “Active” field.
- Specify the SMTP/POP “Server name”.
- Choose a valid email account as the SMTP “From Name”, such as KnowledgeSync@mycompany.com
- Leave the remaining fields blank.
- The SMTP Port defaults to port 25 and the POP3 Port defaults to port 110. These are the same default ports used by Windows; leave these blank unless you know the Windows default settings have been overridden.

Internet (SMTP via Exchange) Account Setup

If you are using Microsoft Exchange, your server is configured for SMTP and/or POP3, and your server does **not use SSL** (Secure Socket Layer), follow these steps:

- Choose email type “Internet”.
- Key in an email account description, such as “KnowledgeSync Alerts”.
- Specify the SMTP login username and password.
- Leave the postoffice field blank.
- Place a checkmark in the “Active” field.
- Specify the SMTP/POP “Server name”.
- Choose a valid email account as the SMTP “From Name”, such as KnowledgeSync@mycompany.com
- Leave the remaining fields blank.
- The SMTP Port defaults to port 25 and the POP3 Port defaults to port 110. These are the same default ports used by Windows; leave these blank unless you know the Windows default settings have been overridden.

GroupWise Account Setup (via SMTP)

KnowledgeSync supports connectivity with GroupWise email via SMTP. When configuring the "Email Account" record, please specify the email type "Internet". You must have both SMTP and POP3 enabled in GroupWise in order to successfully integrate with KnowledgeSync.

MS Exchange Email Account Setup

If you are running an Exchange-based email system, follow these steps:

- Choose email type “Exchange”.
- Key in an email account description, such as “KnowledgeSync Alerts”.
- For the “Login Name”, enter either the Exchange mailbox alias or directory name. Note that this name cannot have spaces in it.
- Specify the password for this login name.
- In the “Post Office” field key in your Exchange server name.

Make sure that you do **not** have MS Outlook open on the KnowledgeSync server at the same time the KnowledgeSync service is running. CDO allows only one user to access the mailbox at a time from one machine.

Lotus Notes Email Account Setup

If you are running a Lotus Notes-based email system, follow these steps:

- Go to the “Services” option for the KnowledgeSync server, right-click on the Service name, and select the “Log On” tab.
- Specify that the Lotus Notes user identified earlier will be the account under which the KnowledgeSync Service will run. Save this entry.
- Go into “Email Accounts” within the KnowledgeSync Administrator and click on the “New Email Account” button at the top-left of the window.
- Set the email type to “VIM”.
- Key in an email account description, such as “KnowledgeSync Alerts”.
- Specify the Username / mailbox that KnowledgeSync will use. Do not use the “short name” for this user/mailbox; use the full specification. A typical Lotus Notes username looks like this:

Robert Williams/Faculty/Atlanta

Or like this:

Robert Williams/Faculty

Typically, using just a name value (such as “Robert Williams”) will not work properly and will fail to login to the Lotus Notes mail system..

- Specify the password for this user.
- Leave the postoffice field blank.
- Place a checkmark in the “Active” field.
- Leave the remaining fields blank.

Test Your Email Account

Regardless of which type of email system you are using, you should test the configuration of your Email Account before proceeding.

Please be sure to use MS Outlook Express when testing an Internet-based (SMTP) account, and use MS Outlook when testing an Exchange-based account.

Follow these steps:

- Start the **Desktop Service** from the KnowledgeSync Programs Group.
- In the KnowledgeSync Administrator, select the “Software Setup” branch, and then the sub-branch called “Email Accounts”.

- Highlight (single-click on) the “Email Account” that you wish to test and click on the “Perform Email Test” button in the toolbar.
- Enter a valid email account and press “OK.” Use the KnowledgeSync Monitor to verify a successful “Email Delivery”. Note that errors will appear in the “Errors Today” branch. Make sure you test sending messages to addresses inside and outside of your domain.

If the test results in an error, see “Common Errors” below. If the test is successful, shutdown the KnowledgeSync Desktop Service and follow these steps:

- Go into the Control Panel on the KnowledgeSync server, select “Admin Tools”, and then “Services”.
- Right-click on the KnowledgeSync Service, select “Properties”, and click on the “Logon” tab.
- Change the “Startup type” to “Automatic” and re-start the KnowledgeSync Service.

It is suggested that you test your Email Account again to make sure that it continues to send successfully with the Service running.

If the additional test is successful, your Email Configuration is complete.

Common SMTP Configuration Errors

6001- You are not connecting to the SMTP server. You may need to use the IP address of the SMTP server. Try to “ping” the SMTP server. Check to see if firewall or an anti-virus software is blocking your outbound emails. In some cases, Network Associates’ “McShield” Service can cause this.

6003 - The SMTP server is not responding. Check to see if the SMTP service is running on the server.

6554 - Relay is not activated; thus the SMTP server is unable to send email outside of your domain. If you need to send emails outside of your domain, you must activate Relay. You should secure your SMTP server so that only those email messages that originate from inside your company will be allowed to use the SMTP server.

Common EXCHANGE Configuration Errors

8002 –Check the following:

- CDO is installed.
- The KnowledgeSync Service is running from a valid domain/username.
- You are not in MS Outlook when sending the test email.

8003 – This error usually has to do with the KnowledgeSync Service having insufficient privileges. Follow these steps:

1. Stop the KnowledgeSync Service.
2. Log into the domain\username that the KnowledgeSync Service uses

3. Run Microsoft Outlook. Configure Outlook for your Exchange server if you are prompted to do so.
4. Send a colleague an email message and have them send one to you.
5. Exit MS Outlook and open the server's "Services" option.
6. Right-click on the KnowledgeSync Service, select "Properties", click on the "Log On" tab, and click on the 'This Account' box.
7. Select the username from step #2 using the Browse button. You may use the "Locations..." button to select the domain server.
8. Enter the password for this account and click on OK.
9. Open the KnowledgeSync Administrator, navigate to your email account record, and confirm that you selected the username chosen in step #2.
10. Start the KnowledgeSync Service, wait 60 seconds, and check the Monitor to see if any pending emails have cleared.

If, after taking these steps, error 8003 continues to appear, it could be due to a Microsoft Outlook Security Patch which is installed with MS Outlook 2003. The patch prevents logging into the Exchange server unless permission is granted each time a request is made to send or receive email.

To see if this patch is the problem, do the following:

- Stop the KnowledgeSync Service.
- Start the Desktop Service.
- Wait 60 seconds and if a dialog box pops-up asking you to grant permission to send the email appears, the security patch is indeed installed.

If the patch is installed, you have two choices. Option #1 is to uninstall your current version of Microsoft Outlook and downgrade to a version that does not have the security patch.

Option #2 is to have your MS Exchange administrator override Outlook's security settings on the Exchange server. Here are the instructions for doing this:

- 1) Create a new item in the Outlook Security Settings folder.
- 2) In the Security Settings tab, select the Security Settings for Exception Group.
- 3) Provide a Security Group Name
- 4) In the Members box, enter the names (separated by semicolons) of the users to which this group of settings will apply. Note that you can use the "To" button on an Outlook email message to help you select – and then copy & paste - the names.
- 5) Press Ctrl+K to resolve the names. Any name without an underline means that Outlook could not match the name against a valid address book entry.
- 6) Close the item and save your changes.

Make **sure** that each user is a member of only **one** Outlook security group; i.e., that the user appears on only one item in the Outlook Security Settings folder.

8116 – The KnowledgeSync Service is running under the “Local System account.”

8139 – One of the following is occurring:

- You are using mapped drives. Services cannot use mapped drives.
- KnowledgeSync cannot find the Exchange server.
- KnowledgeSync cannot find the mailbox.
- KnowledgeSync cannot find the profile.

Connecting to Your Database

Once you have the KnowledgeSync email account successfully configured, you can proceed by connecting KnowledgeSync to the databases of the applications you wish to monitor. The first step is to see if you have ODBC Data Sources configured for those databases.

Add / Verify ODBC Source

You must have an ODBC Data Source for each application database you wish KnowledgeSync to monitor. Follow these steps:

- Log onto the KnowledgeSync server.
- Open the option for “Data Sources (ODBC)”.
- Click on the “System DSN” tab. KnowledgeSync uses “System” Data Sources only, so you can check to see if a Data Source already exists for the database you wish KnowledgeSync to monitor.
- If the ODBC Data Source does not exist, click on the “Add” button to create the new Data Source. You will be prompted to fill out different information based on the type of database (and type of driver) you are using.

Note for SQL Server Data Sources: Set the options to use “ANSI quoted identifiers” and/or “ANSI nulls, paddings, and warnings” **on**.

Note that if you have the KnowledgeSync Event Manager open while you are creating a new ODBC Data Source, you will have to exit and re-enter the Event Manager in order for the new ODBC Data Source to be recognized.

Open the Event Manager

Log into the KnowledgeSync Event Manager. You will see a column titled “Event Management Folders” with a branch beneath it titled “Application Events.” Within the Application Events folder, you’ll see individual application branches.

If you have installed one or more KnowledgeSync EventPaks, you’ll see application branches for those applications.

Adding an Application

To add an application to the Event Manager, follow these steps:

- Single click on the “Application Events” branch.
- Click on the “New Application” button at the top-left of the Event Manager window.

Key in the application's name and click on "OK". The application name will now appear in the list within the Event Manager.

Connecting KnowledgeSync to an Application

Regardless of whether your application is a newly-created one or was loaded from an EventPak, your next step is to specify the ODBC Data Source KnowledgeSync will use for connecting to (and reading data from) the underlying database.

Follow these steps:

- In the Event Manager, highlight (single-click on) the application whose "connection" you need to define.
- Go up to the top of the Event Manager window and click on the "Properties" button. A new window will appear. If there is a value in the "Connection to Use for Database Access" field, click on the "Edit Connection" button. If this field is blank, click on the "New Connection" button.
- Enter a description of the ODBC Data Source you will be using.
- Choose (from the drop-down list) the ODBC Data Source that will allow KnowledgeSync to connect to the underlying database.
- If access to this database is controlled by database-level security, enter the username and password that will allow access.
- Put a checkmark in the "Use Coordinated Universal Time" field only if the dates and times stored in this database are stored in UTC (also known as "GMT") format. If not stored in GMT format, leave this field blank.
- Leave the remaining fields with their default values.
- Click on "Save and Close" at the top-left of your window and then click on "OK" from the previous window.

Connecting to the Sample Application

KnowledgeSync ships with a small "contacts and orders" database that you can use when learning how to build KnowledgeSync events. This is a Microsoft Access database and requires you to configure a corresponding ODBC Data Source.

The ODBC Data Source you define for this database should point to a file called "KS_Sample.mdb" and this file is located in the KnowledgeSync "Data" folder.

Test Your Connection

To test your connection, take these steps:

- Expand the application whose connection you wish to test.
- Single-click on the "Query Definitions" branch.
- Go up to the top-left of the Event Manager window and click on the "New Query Definition" button.

- Click on the “Tables” tab and choose (double-click on) a database table that you know has some records within it.
- Go to the “Columns” tab and make sure that the table’s columns appear in the list titled “Available Columns to Query.” Click on the button titled “Add All Columns to Query.”
- Click on the “Preview” tab. You should see a list of records from this table.

If you receive an error message during this process, chances are good that the ODBC Data Source is incorrectly defined.

If you are able to take all of these steps successfully, your integration test is complete.

KnowledgeSync EventPaks

”EventPaks” are collections of pre-configured KnowledgeSync events for various software applications. Vineyardsoft offers over 30 EventPaks; please contact Vineyardsoft to learn what EventPaks are available.

(These EventPaks are available from the Vineyardsoft website where you downloaded the KnowledgeSync application.)

Since some applications run on multiple database systems (e.g., Pervasive SQL and Microsoft SQLServer), you may have multiple EventPaks to choose from. The EventPaks are named according to the application and database that they work with. Place your cursor over the EventPak to view its full name.

Installing KnowledgeSync “EventPaks”

After installing KnowledgeSync, you may install one or more EventPaks. To install an EventPak, simply double-click on it. Reply to the following installation prompts.

To install an EventPak, click on the “Install” button at the bottom of the EventPak Installation window.

Once the EventPak is loaded into KnowledgeSync, you will receive a “**Finished!**” message at the bottom of your window.

Enter Your License Code

If you have purchased KnowledgeSync, you must enter your license code. To do so, follow these steps:

- Log into any KnowledgeSync module, click on the “Help” menu and then on the “About” option.
- Click on the “License” button.

- Enter the license owner, expiration date, server name, and number of database connections ('0' or blank connections indicates that you have an "Unlimited" connection license.)

If any of the information on this window is not correct, please contact the organization from whom you purchased KnowledgeSync or you may contact Vineyardsoft's Licensing Department at license@vineyardsoft.com.

KS Client Installation

Once you have installed the KnowledgeSync on its server, you have the option to install one or more KnowledgeSync Clients on remote systems.

Note that a KnowledgeSync Client is automatically installed on the KnowledgeSync server; this is what allows users to access the KnowledgeSync application on the server and to perform application maintenance and configuration.

Remote Client installation is designed for organizations that wish to be able to perform KnowledgeSync maintenance and configuration without having to log on to the KnowledgeSync server.

KnowledgeSync remote Clients are licensed separately and require a valid license code from Vineyardsoft. Please contact Vineyardsoft's Sales department if you have any questions about purchasing and/or licensing KnowledgeSync Clients.

Client Preparation: On the Server

Before you install a KnowledgeSync remote Client, please take the following steps on the KnowledgeSync server:

- Create a network share to the "KnowledgeSync" folder where you installed KnowledgeSync.
- Grant "read" and "write" privileges to the user who will be accessing the KnowledgeSync database on the server.

Note that most default network shares are created with "read" access only and thus make sure that "write" access is also granted.

Install Client Components

On the client computer, follow these steps:

- Run the KnowledgeSync installation procedure.
- Un-check (do not install) the "server" components when you get to the "Features" section. This will install the core and client KnowledgeSync components only.
- Run the Event Manager module on the client computer. You will be prompted to enter the location of the KS_Object table. Choose the network share and locate the KnowledgeSync "Data" folder in this share and select the KS_Object file.

Client Install: Troubleshooting

If you have taken the preceding steps and are unable to log in to the remote KnowledgeSync client, take the following steps:

- On the Client, run “REGEDIT” to access the Registry.
- Navigate to the “hkey_local_machine\software” branch in the Registry, and then go to:

Vineyardsoft Corporation\KnowledgeSync2000\General

- Check the values of the following three settings:

Database
EPAKTemplate
Triggered

Make sure they have been set to the correct network share locations such as the ones shown below:

\\yourservername\yoursharename\Data\KS_Object.mdb

\\yourservername\yoursharename\Data\KS_EPAK.mdb

\\yourservername\yoursharename\Data\KS_Triggered.mdb

Installation Troubleshooting

If you experience problems or errors in any stage of your KnowledgeSync initial configuration, review the following sections for common installation errors as well as for instructions on how to resolve them.

Troubleshooting with the “Desktop” Service

The easiest and quickest way to diagnose a problem with KnowledgeSync setup is to use KnowledgeSync’s “Desktop Service”.

The Desktop Service is an alternate way to run the KnowledgeSync service, and it ensures that any errors that the service encounters will pop up in a window on your local system. To use the Desktop Service, follow these steps:

- ❖ Go into the Services option on the KnowledgeSync server and stop the KnowledgeSync service.
- ❖ Go to the KnowledgeSync program group and select the option called “Desktop Service”.
- ❖ Execute the actions that were erroring and look for any error messages or prompts that appear on your desktop.

Servers Remain in “Startup” State

When the KnowledgeSync Service is started, its servers should go from a “startup” state to an “idle” state almost immediately. If the servers remain in a “startup” state for more than a minute or two, that is usually indicative of an “insufficient privileges” issue.

It is suggested that you check the “dcom” security program as the settings in this option can cause the KnowledgeSync servers to sit in a perpetual state of “startup”.

If the KnowledgeSync service is idle, but one or more of the others do not get past the “startup” mode, do the following:

- 1) Stop the KnowledgeSync service
- 2) Run “dcomcnfg.exe”
- 3) Click on the "Default Security" tab
- 4) Check the “Default Launch” button as well as the other two buttons on this tab.
- 5) You will (in most cases) see at least one user for each category. If one user is listed, then all other users are denied access unless they are also entered in the corresponding category. If no users are listed, then all users have access.

- 6) Add the username that you are running the KnowledgeSync service from if other users are listed. Note that you may need to run the KnowledgeSync service from a domain user account with local machine admin rights.

Event Designing Training Courses

There are two very useful computer-based Training Courses on Event Designing. One course focuses on the design of KnowledgeSync queries, and the other course details how those queries can be used within an event and how you can trigger alerts and other actions within KnowledgeSync.

You may download these Training Courses from:

http://vineyardsoft.com/lit/ks_cbt_query_designing.pps

http://vineyardsoft.com/lit/ks_cbt_event_designing.pps

For More Help . . .

Contact Vineyardsoft Corporation.

But before you do so, please make sure that you have gone over all of the steps in this guide, as that will be the first question asked of you by our Support Staff.

The best way to contact our Technical Support Team is via the web, at http://www.vineyardsoft.com/html/email_support.html.

If you'd prefer to use phone, you can call us at 800-850-8055 (within the US), or at 508-696-6495 international.

In most cases, calls into Support will be routed to voicemail as this enables our support reps to respond to the highest priority calls first.

Thank you for your interest in KnowledgeSync and we look forward to helping you with a smooth and successful implementation of the KnowledgeSync Business Activity Monitoring solution.