



Pre-Installation Checklist

This guide is intended to properly prepare you for a successful installation of KnowledgeSync. A detailed walk-through of the installation process can be found in the Implementation Guide and the Reference Guide.

Table of Contents

Choosing a KnowledgeSync Server	3
Minimum System Requirements:	3
Configure KnowledgeSync User Account.....	4
User Account Specifications	4
KnowledgeSync & Regional Settings	6
KnowledgeSync Database	6
Information Needed to Set Up Outbound Email.....	6
Internet / SMTP	6
MS Exchange	7
Lotus Notes	8
GroupWise (via SMTP)	9
Information Needed to Set Up Faxing	9
Information Needed to Set Up Paging / SMS.....	9
Paging	9
SMS	9
Information Needed to Set Up Webcasting	10
Create "Master" Directory	10
Create Recipient Directories	10
Information Needed for Report Distribution	10

Choosing a KnowledgeSync Server

KnowledgeSync is designed to be installed on a single machine – a server from which KnowledgeSync can access the database(s) of the application(s) you wish it to monitor.

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).

Please note that all set-up and maintenance of KnowledgeSync (not administration – creating queries, events etc.) is to be done from this server.

A KnowledgeSync server license allows one copy (iteration) of the KnowledgeSync Event Manager, Navigator, Monitor, and Administrator to be run only from the server on which the KnowledgeSync database is installed.

If a client wishes to have remote access to any of these KnowledgeSync modules (i.e., access to KnowledgeSync from a system other than the server on which the KnowledgeSync database is installed), the client may purchase one or more KnowledgeSync "client licenses."

(Please note that if a customer does not need to access KnowledgeSync from a machine other than the server on which KnowledgeSync is installed, there is no need to purchase a KnowledgeSync client license.)

A single client license provides a single user with remote access to all four KnowledgeSync modules; the Navigator, the Event Manager, the Administrator, and the KnowledgeSync Monitor. Please note that these licenses are per "named computer and/or user" and so a single client license may not be shared among multiple users.

Minimum System Requirements:

One-Connection License:

Platform: MS Windows NT, 2000, 2003, XP, Vista, and Windows Server 2008

Memory: 512MB

Processor: Pentium 290 (or greater)

Disk Space: (For installation) 425MB

Disk Space: (For the application) 200MB

Disk Space: (Per event) 5kb maximum (this includes event, query, subscribers, and all message texts)

Two & Unlimited Connections:

	Minimum 2 connection	Recommended 2 Connection	Minimum Unlimited	Recommended Unlimited
CPU	1.0ghz/1	1.2ghz/1	1.2ghz/1	1.8ghz/2
RAM	512mb	512mb	512mb	1gb
HD	20GB	30GB	30GB	50GB
OS	----- NT/XP/2000/2003/Vista -----			

Configure KnowledgeSync User Account

If you will be installing KnowledgeSync to run under Microsoft Windows NT, 2000, XP, or Vista you will need to configure the account that the KnowledgeSync service will run under.

- Create (or determine) the username under which the KnowledgeSync Windows service will run. This must be a domain user with local admin rights and this account must be a member of the "Power Users" group. (You may wish to create a new user called something like "Ksync".)
- Note that if you plan on using KnowledgeSync to send or receive e-mail via a Microsoft Exchange-based e-mail system, you must be sure that the user account you have selected is a Domain User.
- Log into the user account you have created (or selected) and install KnowledgeSync.

Note: The account that you logon with when you install KnowledgeSync is also the account that you must logon with for all subsequent set-up and maintenance of the KnowledgeSync application.

User Account Specifications

As stated, the KnowledgeSync Service should be configured to be run by an actual user Account. It should not be run by "Local System Account", this is not an actual "User Account".

If you are using MS Exchange, this account must be defined as a Domain User Account.

This user account should have local admin rights only on the server where the KnowledgeSync Windows Service is running. If local admin rights are not possible, you should give the 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

If when starting the KnowledgeSync Windows service, any of the "virtual" servers fail to go "Idle" and remain in "Startup" mode do the following:

Vineyardsoft Corporation
www.vineyardsoft.com
info@vineyardsoft.com
800-850-8055

Stop the KnowledgeSync Windows service.

Verify the USER who is running the KnowledgeSync Windows service is a member of the Administrators Group as well as the Power Users Group.

My Computer (Right Click)

Manage

Groups

Administrators

Power Users

** Explicitly add the USER who is running the KnowledgeSync Windows service to each group if they are not there.

NEXT

Start

Run

dcomcnfg.exe.

Component Services

Computers

My Computer

DCOM Config

Scroll down to: (the list is in Alphabetical. order to the Virtual server which is stuck in "Startup mode (You may see two!)

For each one:

(Right Click)

Properties

Security

"Customize" - "Launch and Activation Permissions" tab.

Make sure the USER running the KnowledgeSync Windows Service is explicitly added to this tab with "Allow" for the following "Permissions"..

Local Launch

Remote Launch

Local Activation

Remote Activation

"Customize"/Edit - "Access Permissions" button.

Make sure the USER running the KnowledgeSync Windows Service is explicitly added to this tab with "Allow" for the following "Permissions"..

Local Access

Remote Access

"Customize"/Edit - "Configurations Permissions" button.

Make sure the USER running the KnowledgeSync Windows Service is explicitly added to this tab with "Allow" for the following "Permissions"..

Full Control

Read.

Start the KnowledgeSync Windows service.

KnowledgeSync & Regional Settings

Because many KnowledgeSync events are triggered by date and/or time fields in your application databases, you should make sure that the KnowledgeSync service is running from a user account that has the correct regional settings.

Because regional settings are personal for each logon username, you should check to make sure that the regional settings for the KnowledgeSync service user account are set in an appropriate fashion.

Note that the "Local System account" uses the default regional settings for the KnowledgeSync server when the operating system was originally installed on that server.

KnowledgeSync Database

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 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".)

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.

Information Needed to Set Up Outbound Email

! Note: The ability to send HTML-formatted e-mail alert messages is supported only with e-mail type Internet.

Embedded SMTP Server

As of version 7.5 of KnowledgeSync, the application includes an embedded email engine called "Hermes". The Hermes email engine is an SMTP server and its use is restricted to KnowledgeSync.

After installing KnowledgeSync, if you look at the Windows Services option on the KnowledgeSync server, you will see the Hermes Email Server listed there; it will automatically be configured to start-up automatically, and upon completion of the KnowledgeSync installation, the Hermes Email Server will be running.

(Note that the Hermes email server does not support authentication.)

Vineyardsoft Corporation
www.vineyardsoft.com
info@vineyardsoft.com
800-850-8055

If you wish to use the Hermes Email Server with KnowledgeSync, there is no further email configuration that needs to be done.

If, however, you would prefer to use your organization's own email server with KnowledgeSync, you will need to stop and disable the Hermes Email Server. To do so, go into your Windows Services option, stop the Hermes Email Server, and then right-click on the Hermes Email Server, click on "Properties" and set the start-up mode for this Service to "Manual".

Internet / SMTP

Here is the information you will need to have prior to setting up outbound email via SMTP:

- Login ID
 - Login Password
 - SMTP Server name also IP address in case they have DNS resolution issues
 - POP server name also IP address in case they have DNS resolution issues
- Will you need to send email outside the Domain? (See next item)
- Is Relay Allowed? (*Required to send mail outside of your own domain*)
- Is Email Hosted? (*We suggest you use the KnowledgeSync internal SMTP Engine*)
- Is SMTP Authentication required? (*KnowledgeSync does not currently support authentication, please use the KnowledgeSync internal SMTP Engine*)

Test the "Email Sending Account" using Outlook Express. If you are unable to send via Outlook Express, KnowledgeSync will not be able to send emails either.

During setup of email in KnowledgeSync verify that both KnowledgeSync and Outlook Express have the exact same settings.

During Setup in Outlook Express verify the following:

Servers Tab

"Log on using Secure Password Authentication" - UNCHECKED

"My server requires authentication" - UNCHECKED

See if you receive any error messages that are more informational using Outlook Express.

Test sending emails to:

A User inside the domain.

A User outside the domain.

MS Exchange

Here is the information you will need to have prior to setting up outbound email via Exchange:

- Mailbox
- Password
- Post Office

- If you wish to connect KnowledgeSync to MS Exchange directly, (without using SMTP), you must make sure that CDO ("Collaborative Data Objects" – a component from Microsoft Outlook) is installed.

Note: CDO (Collaborative Data Objects) is not installed by default, even if you have already installed MS Outlook, check to see if CDO is installed. To do so, follow these steps:

1. Control Panel
2. Expand the "Office" or "Outlook" branch and see if CDO has a red 'x' through it. If it does, you need to install CDO. If it doesn't have a red 'x' through it, you should be all set, although you may still choose to re-install (or repair) it as this will not harm your system.
 - MS Exchange Administrator available to apply Outlook Security Patch Overrides (Verify Outlook Security Patch is installed)

http://www.vineyardsoft.com/kb/Verifying_Security_Patch.htm

Applying Security Patch Overrides must be applied by the EXCHANGE Administrator on BOTH the EXCHANGE server and the Client Server where KnowledgeSync is installed.

http://www.vineyardsoft.com/kb/Exchange_outlook_security_patch_override.htm

- Decide which Windows domain account you will run the KnowledgeSync service from. It must be run from a real user account -- not the "Local System Account".

MS Exchange authenticates access to mailboxes by using your login name. (Use of the local system account to read or write Exchange mailboxes is not allowed.) If you have a User Account set up already, log into that account, otherwise, create a new account.

- Test this account by sending two e-mail messages; one to yourself and one to another person within your organization.

Do you want to embed HTML in the body of the email? HTML it will be sent as an attachment when using MS Exchange. If you wish to embed HTML in the body of the email you must use Email Type INTERNET – SMTP.

Make sure on the server that KnowledgeSync is running that MS Outlook is not open. Only a single instance of CDO is allowed at one time and CDO allows only a single user at a time to access the mailbox from a server.

Lotus Notes

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.

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.

GroupWise (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.

Information Needed to Set Up Faxing

KnowledgeSync supports any class 1 or class 2 modems installed on (or reachable from) the KnowledgeSync server. KnowledgeSync can send faxes using its internal faxing technology or by using Microsoft Fax (which is suggested).

KnowledgeSync's embedded faxing technology supports only plain-text (ascii) formatted documents; Microsoft Fax supports Rich Text and other fax formats.

To send out messages via a modem-driven fax, KnowledgeSync requires the use of a modem that is reachable from the server on which KnowledgeSync is installed. This modem may be shared by other applications and devices.

KnowledgeSync's integration with Microsoft Fax is done via a script and the sample script can be found here:

http://www.vineyardsoft.com/kb/Script_Fax.htm

Information Needed to Set Up Paging / SMS

KnowledgeSync uses a standard analog modem to deliver Page or SMS messages. Please make sure the modem is installed properly prior to the installation of KnowledgeSync.

Paging

KnowledgeSync supports any class 1 or class 2 modems installed on (or reachable from) the KnowledgeSync server.

To send out messages via modem-driven pager, KnowledgeSync requires the use of a modem that is reachable from the server on which KnowledgeSync is installed. This modem may be shared by other applications and devices.

SMS

Ask the SMS providers if they have an Email interface (most do), this way, you can use Email rather than modem boards. It's much faster i.e. no waiting for dial tones and connections from modem boards to server boards.

Each SMS provider has their own method.

For example:

In-house we use Verizon Wireless for all of our SMS needs. We setup Subscribers in

Vineyardsoft Corporation
www.vineyardsoft.com
info@vineyardsoft.com
800-850-8055

KnowledgeSync for example called 'Jim Verizon SMS' and then set the Email Address to the following:

thephonenumberishere@vtext.com

Where 'thephonenumberishere' is the numeric number to the SMS phone. e.g.
9785551212@vtext.com

Any time an Event triggers, it is sent to the phone usually within 10 seconds or less.

Information Needed to Set Up Webcasting

Since KnowledgeSync's webcast module dynamically creates and publishes HTML pages with triggered event data, you need to set up one or multiple locations (disks and directories) to which the webcast HTML output files will be published.

Create "Master" Directory

Typically, an organization will create a webcast publishing directory on their web server; wherever you decide to create this directory, it should be a directory that is easily accessible by anyone using a web browser.

You might wish to call this directory something like "KS_Webcaster" so you can easily identify it in the future.

Create Recipient Directories

The easiest way to think about webcasting alerts is to equate it to e-mail alerts; just as every alert recipient has his or her own e-mail address, each webcasting alert recipient should have his or her own webcasting recipient directory.

This is an important step, as just as different KnowledgeSync events send e-mail alerts to different recipients, those same events need to send webcast alerts to different recipients. The only way to make sure that each recipient receives only the alerts they should know about is to create a separate webcasting directory for each recipient.

Thus the second step in the creation of webcasting directories is to create sub-directories (within the webcast "master" directory) for each recipient who will receive webcast alerts.

For example, let's assume that you have created a master webcast directory called "KS_Webcaster" and you want to be able to send webcast alerts to three users named "Smith", "Jones", and "Ford". Within the "KS_Webcaster" directory, you would create three sub-directories named "Smith", "Jones", and "Ford".

Information Needed for Report Distribution

KnowledgeSync does not need Crystal Reports installed on the KnowledgeSync server in order to generate and distribute forms and reports.

KnowledgeSync embeds Crystal Reports version 11. However KnowledgeSync can run Crystal Reports that were designed in Crystal versions 8.5, 9.0, and 10.0, as well as in version 11. When KnowledgeSync is installed, so too are the components of Crystal Reports version 11. That means that if, on the KnowledgeSync server, version 8.5 of the Crystal Reports Designer is installed, the Crystal version 11 files that are included with KnowledgeSync will

Vineyardsoft Corporation
www.vineyardsoft.com
info@vineyardsoft.com
800-850-8055

overwrite the version 8.5 files that are already on that server. Likewise, if the KnowledgeSync server is host to one or more applications that embed Crystal version 8.5 files, the installation of KnowledgeSync will cause those files to be overwritten by the version 11 Crystal files that are included with KnowledgeSync.

But KnowledgeSync has no impact on your ability to design, run, and generate Crystal Reports - of any version - on any other servers within an organization. So, if you have version 8.5 (for example) of the Crystal Reports Designer - or you have an application that embeds version 8.5 of the Crystal runtime engine - you can have KnowledgeSync peacefully co-exist with those other applications as long as they are installed on different servers.

And - if you ever run into a situation where the version 11 Crystal Reports component in KnowledgeSync fails to run because someone has mistakenly loaded an earlier version of Crystal Reports (or an application that embeds an earlier version of Crystal Reports) onto the KnowledgeSync server, all you need to do is to un-install and re-install KnowledgeSync back onto its server. That process will cause KnowledgeSync to overwrite any existing Crystal files on that server with the Crystal components that are included within KnowledgeSync, and all will be well again.