

- 1 Welcome to KnowledgeSync!..... 2
- 2 Requirements..... 2
 - 2.1 Technical Requirements 2
 - 2.2 System Requirements..... 2
- 3 Upgrading..... 2
 - 3.1 From Version 9.x or Older 2
 - 3.2 From Version 10.x 3
- 4 Configuring Required Components 3
 - 4.1 IIS..... 3
 - 4.2 SQL Server 3
- 5 Download KnowledgeSync 3
- 6 Installation 4
 - 6.1 Configure IIS Web Server..... 4
 - 6.2 Install KnowledgeSync 5
 - 6.3 The KnowledgeSync Service 6
 - 6.4 Configuring Firewall Exceptions..... 6
 - 6.4.1 To add a Windows Firewall Exception 7
 - 6.5 Accessing KnowledgeSync 8
 - 6.5.1 From the KnowledgeSync Server..... 8
 - 6.5.2 From Network Clients..... 8
- 7 Apply Your KnowledgeSync License..... 8
- 8 Configuration..... 9
- 9 Appendix: Moving Your Server 9
 - 9.1 Maintenance and Support Agreement..... 9
 - 9.2 Install KnowledgeSync on the New Server 9
 - 9.3 Database..... 9
 - 9.4 Configuration Files..... 10
 - 9.5 License..... 10
- 10 Appendix: KnowledgeSync Backups and Maintenance..... 11
 - 10.1 Backups 11
 - 10.2 Logging Guidance 11
 - 10.2.1 Scripts to Update Recovery Model to Simple 11
 - 10.3 Maintenance 11
- 11 Appendix: Helpful Resources..... 12

1 Welcome to KnowledgeSync!

Welcome to KnowledgeSync (“KS”), the industry’s leading Business Activity Monitoring (BAM) technology.

This guide helps you install KnowledgeSync version 10 according to the needs of your organization. We hope you enjoy working with KnowledgeSync and encourage you to contact us with your feedback (contact information is at the end). Now let’s get started with KnowledgeSync!

2 Requirements

2.1 Technical Requirements

The following instructions assume a certain level of computer and software experience and understanding. While the directions are intended to be as user-friendly as possible, if you are not comfortable with the following Windows administrative functions, please refer to your local IT resources for assistance:

- Creating and Sharing Directories
- Activating Windows Components
- Modifying Windows Service properties
- Browsing and modifying the Windows Registry
- Windows user creation
- Adjusting Windows UAC settings
- Knowing your SQL Server Name and Instance Name (if applicable) as well as the name of the database for your Manufacturing software

2.2 System Requirements

See the KnowledgeSync V10 System Requirements document.

3 Upgrading

Upgrading adds a few steps as shown below. After completing these steps, you must complete the remaining installation steps in this guide.

3.1 From Version 9.x or Older

Before upgrading from a previous version to v10, you must:

- Be running version 8.x or 9.x of KnowledgeSync
- Migrate your KnowledgeSync installation to a SQL Server database. (In v8/v9, open the KnowledgeSync Programs Group and select the option to “Migrate Database to SQL Server”.)
- Stop the V9 (or V8) Windows Service.

During the installation process:

- Your existing KnowledgeSync settings database will be backed up.
- All your existing KnowledgeSync data (queries, events, subscribers, etc.) will be carried over to the installation of v10.

After installing version 10, please uninstall the earlier version.

3.2 From Version 10.x

If KS V10.0 has been installed, you must uninstall it before installing KS V10.1.0 or newer versions. Databases will remain intact and all data will be upgraded in place.

If KS V10.1 or later has been installed, you can upgrade by running the latest installer, and the installer will upgrade the older version.

In most cases, after installation you must clear your browser cache (Ctrl-F5 in the browser) for each client browser accessing KnowledgeSync to see the user interface updates for the newer version.

4 Configuring Required Components

4.1 IIS

KnowledgeSync uses a web component requiring that IIS be enabled and that specific IIS components be enabled in Windows. The installation will not be successful if IIS is not detected, and if specific IIS components are not enabled.

To enable IIS and its required components (e.g., on Windows Server 2016), follow these steps:

1. Open Server Manager and click Manage, Add Roles, and Features. Click **Next**.
2. Select role-based or feature-based installation and click **Next**.
3. Select the appropriate server. The local server is selected by default. Click **Next**.
4. Enable Web Server (IIS) and click **Next**.
5. No additional features are necessary to install the Web Adaptor, so click **Next**.
6. On the Web Server Role (IIS) dialog box, click **Next**.
7. On the Select role services dialog box, verify that the web server components listed below are enabled. Click **Next**.
8. Verify that your settings are correct and click Install.
9. When the installation completes, click **Close** to exit the wizard.

The IIS components listed in section 6.1 satisfy the minimum requirements to run the KnowledgeSync web application. If other IIS components are enabled, they do not need to be removed.

4.2 SQL Server

You must have access to Microsoft SQL Server on either your local computer, network, or hosted service. Before beginning the installation, you must have:

- The network name or address of the SQL Server instance, and
- The username and password of the SQL Server user with read and write permissions to the server so the KnowledgeSync installer can create its databases.

5 Download KnowledgeSync

The first step is to download KnowledgeSync as instructed in your welcome email, or if you are an ECI ERP customer, from your ECI ServiceCloud account.

The installation is password-protected, and you will be emailed the corresponding password upon your submission of the download form. If you did not receive such an email, check your spam or junk mail folders, or contact KnowledgeSync Support using the form on the KnowledgeSync website.

This guide provides basic instructions that will quickly get you up and running with ECI KnowledgeSync. If you would like to view the detailed installation instructions, you may refer to the KnowledgeSync Manual (see link below under "Printed Resources").

This guide will provide you a listing of the technical and security requirements for installation, a list of resources available to you as a KnowledgeSync User, and instructions for installing ECI KnowledgeSync Version 10 including the importing of the ECI-provided EventPak. It also includes the necessary steps to configure the installed software. Upon completion, your system should be fully capable of utilizing the ECI-provided Events and will be ready for you to begin modifying those Events as well as developing Events of your own design.

These instructions assume a single-server setup, where all components of the KnowledgeSync Server will be running on the same machine. If you wish to do a multi-server setup, you may refer to the KnowledgeSync Manual for instructions specific to that configuration.

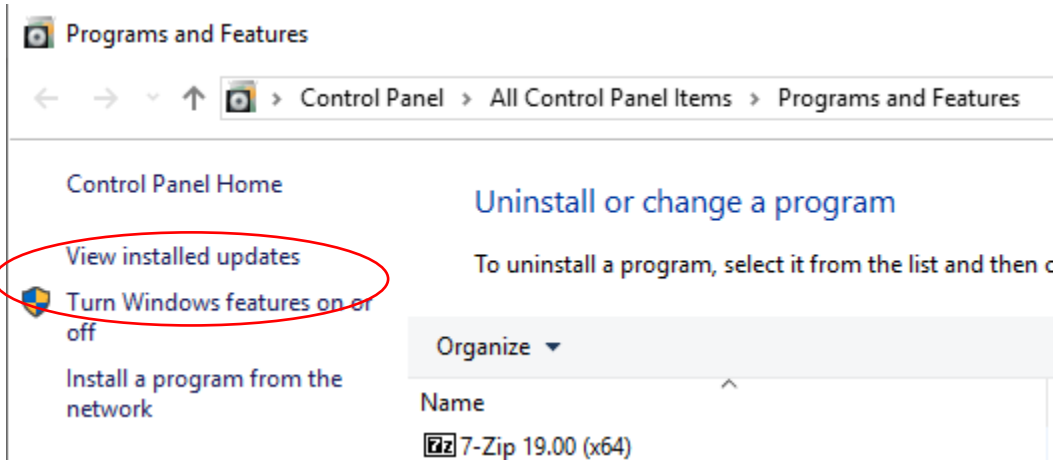
6 Installation

6.1 Configure IIS Web Server

IIS is a component of Microsoft Windows that may or may not be active on the machine you intend to use for the KnowledgeSync Server. When going through the steps below, you may discover that all the settings mentioned are already active on your system. This is nothing to be concerned about if another product running on your server has already required these settings.

Each Windows Operating System has a slightly different interface for modifying Windows Components, but the window to do so can generally be accessed by doing the following:

- 1) Hold down the Windows Key on your keyboard and press the letter R. This will bring up a Run prompt.
- 2) Type **appwiz.cpl** into the Run prompt and press Enter.
- 3) This will bring you to the Programs and Features Control Panel, and from there, you should see a link on the left-hand side to "Turn Windows features on or off", which you will want to click.



- 4) This will bring you to an interface where you can adjust the installed Windows features on your machine. Again, this interface is slightly different between the various operating systems. Continue until you reach a point of selecting IIS (Internet Information Services) modules. Once there, ensure the following options under IIS are selected.

Other items being selected are no problem - listed here are just the minimum requirements.

<p>Web Server</p> <ul style="list-style-type: none"> • Common HTTP Features <ul style="list-style-type: none"> ○ Default Document ○ Static Content • Security 	<p>Management Tools</p> <ul style="list-style-type: none"> • IIS Management Console • IIS 6 Management Compatibility <ul style="list-style-type: none"> ○ IIS 6 Metabase Compatibility • IIS Management Scripts and Tools
--	--

<ul style="list-style-type: none"> ○ Request Filtering ○ Basic Authentication ○ Windows Authentication ● Application Development <ul style="list-style-type: none"> ○ .NET Extensibility 4.6 ○ .NET Extensibility ○ ASP.NET 4.6 ○ ASP.NET ○ ISAPI Extensions ○ ISAPI Filters 	<ul style="list-style-type: none"> ● Management Service
---	--

5) Once all are selected, click OK, and the installation of those features will start. Occasionally Windows will request a reboot after the installation of these features. If this is the case, please reboot before proceeding with the KnowledgeSync Installation.

Troubleshooting Tip: If the Windows features fail on installation, ensure your machine is up to date with all High Priority and Critical Windows Updates, including all reboots requested and then attempt to add the features again.

6.2 Install KnowledgeSync

1. Download the KS installer to your Downloads folder.
2. Create a folder under the Downloads folder named **Install Files**.
3. Move the files downloaded for the setup of ECI KnowledgeSync into the Install Files directory.
4. Open the file **KSSetup_V10.03.00_Release.zip** file and extract all of the files from it into the Install Files directory.
5. Double-click on the extracted file, **setup.exe**.
6. Once the KnowledgeSync install begins you'll be prompted by it for a password. This password is (case-sensitive): **knowledgesync**
Enter it and click OK.
7. There are up to four supporting software packages that may need to be installed before KnowledgeSync installs. These include: SQL Server Client, WinWrap Basic, Node JS and Crystal Reports Runtime. As you are presented with any of these preliminary packages, install the packages taking all of the default options for installation. Any windows that remain open post-installation can be closed.

If you already have a software package, like your ERP for example, on your server that uses Crystal Runtime, you will not be prompted for this install.

8. Once the supporting installations are completed, you will be directed to the KnowledgeSync installation. On the License Agreement window, select the radio button that says, **I accept the terms of the license agreement** and click Next.
9. On the Setup Type window, ensure **Complete** radio button is selected, and click **Next**.
10. If the IIS pre-requisites listed in section 6.1 are not installed on your machine, the install will not be allowed to continue. The installer will show a popup listing the missing settings, along with the instructions from section 6.1. Abort the installation, update the pre-requisites, and restart the install.
11. In the Web Site Required Information window, in the TCP Port field specify the port number to be used for the KnowledgeSync web service. **It is recommended to use 8082 or a different UNUSED port.** It is not recommended to use the same port as your default web site (80) or another port that you know may be being used for a different web application. Please consult your local IT resources if you have questions regarding this selection.

In the Server(s): field, by default the server you are currently installing to will be listed. You will only need to adjust this if you are planning on a multiple server setup where you would have the portal (web server) running on a different machine than the engine (Windows service). In this case, the server's names should be separated by commas. If you are performing a single-server setup (most common - and the setup these instructions support), do not change the content of this field and click Next.

- On the Database Server window, enter the SQL Server Name\Instance in the **Database server that you are installing to:** field. This may be something like MyServer or MyServer\SQLExpress. Please consult your local IT resources if you are unsure of this name.

In the **Connect using:** area, if you are logged into Windows with an account you know is a SYSADMIN on the designated SQL Server, you may select "Windows authentication". Otherwise if you are not, or prefer to use SQL Authentication, select the second radio button and enter the SQL Login credentials for a SQL account with SYSADMIN rights on the designated SQL Server. Then click Next.

- On the **Ready to Install the Program** window, click **Install**.
- When presented with the **InstallShield Wizard Complete** window, click **Finish**.
- Important:** If you are upgrading from a previous V10 version, make sure to refresh the cache on all browsers where you have launched KS before.
Bring up the KS Portal Login screen using the desktop icon or by navigating to the website.
Press "Ctrl + F5" to do a hard reload of the page.

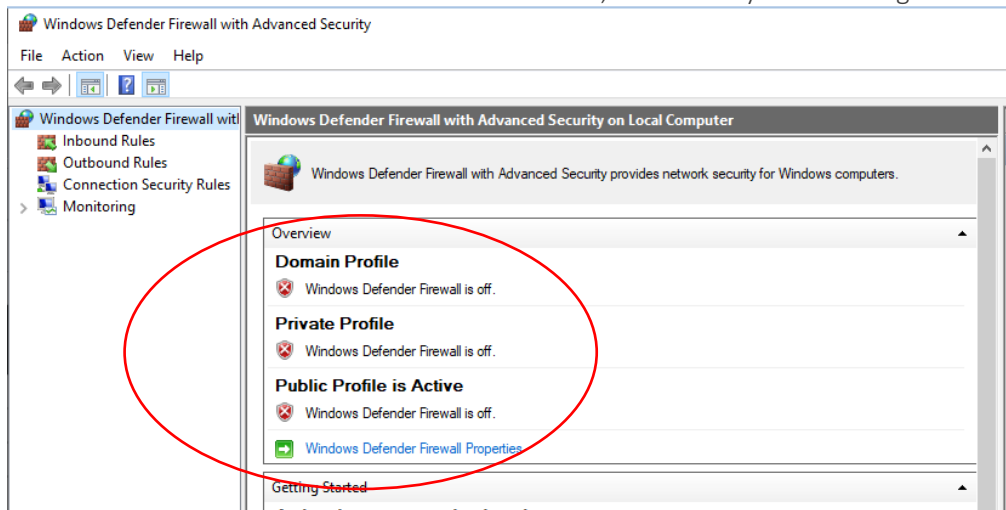
6.3 The KnowledgeSync Service

KnowledgeSync uses a Windows Service for various functions of the software. Starting with V10.3, the KnowledgeSync Service can be run under the Local System account, no changes should be needed to the Logon settings for the service.

6.4 Configuring Firewall Exceptions

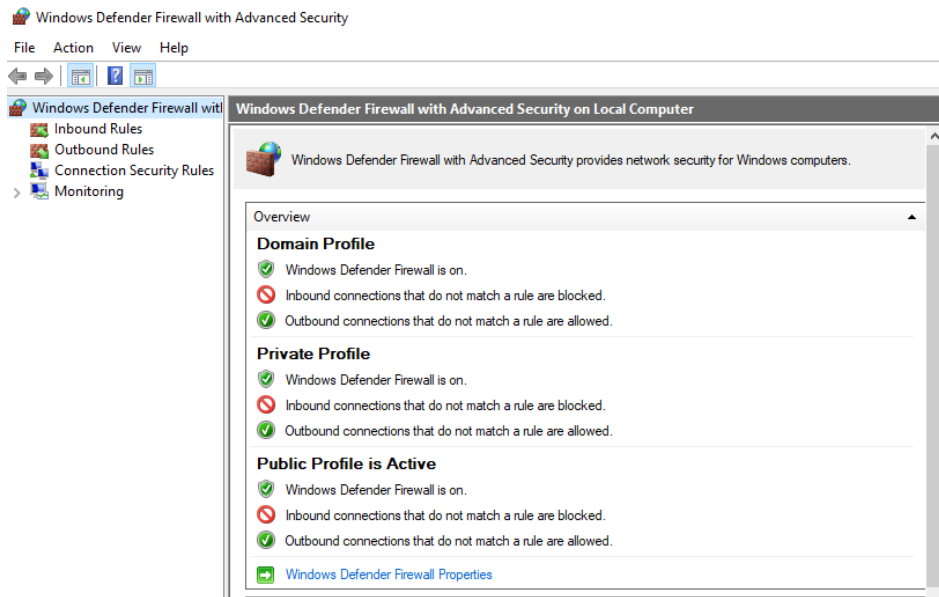
If you plan to access the KnowledgeSync Portal from computers other than the server on which it's installed, you will need to ensure that the Windows Firewall on the server permits access. On the KnowledgeSync Server:

- Hold down the **Windows Key** and **press the letter R** – this will bring up a Run prompt.
- Type: **wf.msc** in the Run Prompt and press **Enter**. This will bring you into the Windows Defender Firewall with Advanced Security window.
- If the Windows Firewall is inactive on this machine, the screen you are brought to will look like this:



Technically, no further action is needed if this is the case.

- If the Windows Firewall is active, the screen will look like this:

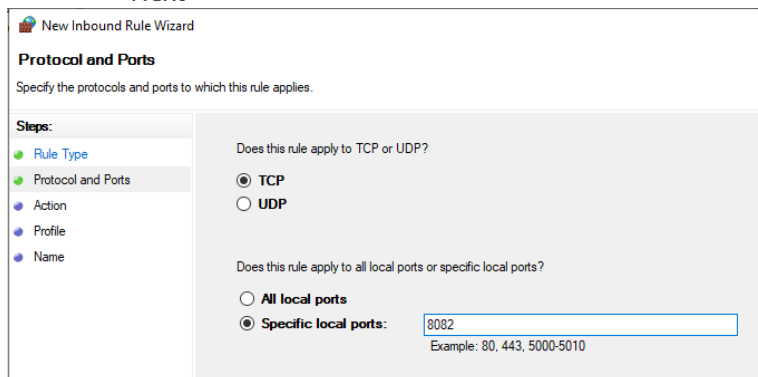


If this is the case, further action is required on this server.

*Only a portion of profiles may be turned on in the firewall settings window, but if any of them are, you will want to make sure to add an exception. **You may even choose to add the exception if the Windows Firewall is turned off, because occasionally Windows Updates will turn the Firewall Profiles back on without warning.***

6.4.1 To add a Windows Firewall Exception

1. In the Windows Defender with Advanced Security window, click **Inbound Rules** on the left.
2. On the right, click **New Rule...**
3. In the New Inbound Rule Wizard window, select the radio button for **Port**, then click **Next**.
4. Ensure the options for **TCP** and **Specific local ports:** are the selected radio buttons.
5. In the Specific local ports: field, enter 8082, *or which ever port you defined during the KnowledgeSync installation.* Then click **Next**.



6. Ensure the radio button for **Allow the connection** is selected and click **Next**.
7. Ensure all three boxes are checked for which profiles the exception will apply to, then click **Next**.
8. For the Rule name, enter: **KS - TCP Port 8082 for KnowledgeSync Web Service** (modifying the name if a different Port was defined for the KnowledgeSync web service). Then click **Finish**.

A new Inbound rule should now appear in the roles list excepting connections to the defined port for KnowledgeSync.

6.5 Accessing KnowledgeSync

6.5.1 From the KnowledgeSync Server

Upon completion of the KnowledgeSync installation, you'll find an icon on the desktop labeled Portal with a KnowledgeSync logo on it. To access KnowledgeSync, double-click this icon. This will execute a web browser opening the KnowledgeSync web interface. You will be prompted for a username and password. By default, these values are:

- Username (not case-sensitive): Admin
- Password (case-sensitive): password

This password can also be changed after the initial login by clicking on the admin icon in the upper right side of the window and selecting "Profile".

You must use Microsoft Edge or Google Chrome as your web browser when accessing the KnowledgeSync Portal.

6.5.2 From Network Clients

The KnowledgeSync web application can be accessed from any machine on the network that can browse to the web service on the server. Open the desired web browser, and in the address line enter the following:

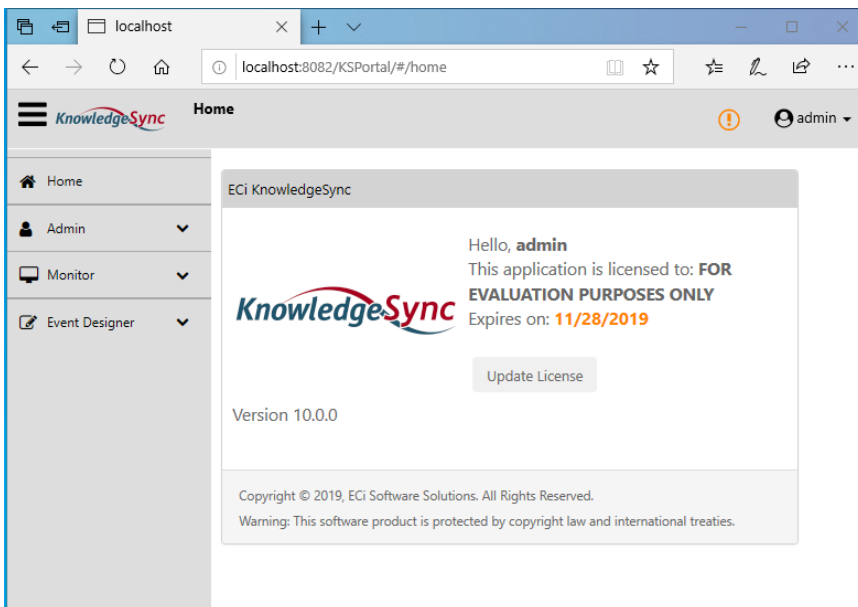
```
http://XXX:8082
```

Substitute the network name or IP Address of your KnowledgeSync server for XXX.

If a port other than 8082 was specified during the installation, substitute that port number for 8082 in the URL.

7 Apply Your KnowledgeSync License

Upon logging in to the KnowledgeSync Portal you will be presented with a reminder to update your license. You should have received an e-mail with an attached .txt file that includes your license information. If you do not have this information, contact your Sales Rep to have it re-sent.



- 1) Click the **Update License** button in the middle of the workspace

- 2) In the Update license window enter the information into the fields EXACTLY as listed in the License text file you've received.

The License Code is tied to your Licensed Server Name - if an incorrect server name was provided to generate the license will need to be re-generated with the correct server name. Contact your Sales Rep if this is the case.

The screenshot shows a dialog box titled "Update license" with the following fields and values:

- License Owner: NOT FOR RESALE ECI
- Expiration Date: 10/8/2020
- License Code: 01-3-31248D766E414
- License Type: DEVELOPER
- Licensed Server Name: BONFIGJBSERVER
- Licensed DB Connections: 0
- Licensed Users: 0

At the bottom right, there are two buttons: "Save" (green) and "Cancel" (orange).

- 3) Click the **Save** button.

Your Home screen will now reflect your license information.

- 1) Restart the KnowledgeSync Service
 - a) Hold down the Windows Key and press the letter R – this will bring up a **Run** prompt.
 - b) Type: **Services.msc** in the Run Prompt.
 - c) Press **Enter**.
 - d) Find the “**ECI KnowledgeSync**” service, right-click on it and select **Restart**.

8 Configuration

You have completed the installation of ECI KnowledgeSync. The next step is configuration - see the KnowledgeSync User Manual Section 1: Configuration.

9 Appendix: Moving Your Server

If you are moving your KnowledgeSync software to a new server, you will need to take the following steps. These steps apply only if moving the software and using the same version on both servers. If you are moving the server and upgrading, first upgrade your existing server, and then use these steps to move.

9.1 Maintenance and Support Agreement

ECI provides new license keys and migration support to users with a current maintenance and support or subscription agreement.

9.2 Install KnowledgeSync on the New Server

Preconfigure the new server. Use the KnowledgeSync installer to install the software on the new server.

9.3 Database

If your SQL Server databases are on the same server and need to be moved, create a backup of your KnowledgeSync databases in SQL Server. Restore those databases on the new server.

9.4 Configuration Files

Move the configuration files.

9.5 License

Contact ECI to get a new license key. The license key is specific to your server name, so please provide the computer name in the request.

10 Appendix: KnowledgeSync Backups and Maintenance

10.1 Backups

You will need to configure the backup and maintenance of your KnowledgeSync databases. The three new databases you will need to address are called **KS_Inbox**, **KS_Object** and **KS_EPak**. If you need assistance configuring these backups, a consultant may be contracted to assist from the consulting team for your Manufacturing package.

These backups as well as *the entire KnowledgeSync folder where you installed the application* should be backed up off server the same way other files are backed up for off server storage and disaster recovery.

10.2 Logging Guidance

During the normal course of operation and execution of events, KnowledgeSync can create a lot of updates in the KS_Object database which can cause SQL database logs to grow.

We recommend that customers review the SQL Server guidance with respect to recovery models and use the settings that are appropriate for their environment, and as recommended by their DBAs and IT departments.

If log space is an issue, the KnowledgeSync databases can be set to Simple recovery model. This eliminates log backups. We recommend periodic manual backups to protect the data in these databases.

Reference: [Recovery Models \(SQL Server\)](#)

10.2.1 Scripts to Update Recovery Model to Simple

Download and extract the scripts in the following link. Run the scripts in SQL Server Management Studio to set the recovery model to Simple and truncate existing logs.

[UpdateKSRecoveryModel.zip](#)

Refer to SQL Server documentation for more information on recovery models and how to set them through SQL Server Management Studio.

10.3 Maintenance

KnowledgeSync can monitor itself using a free tool called the [Event WatchDog EventPak](#). This EventPak does not require a license “connection”. The WatchDog monitors for such items as:

- Event errors
- Alert delivery errors (e.g., an invalid pager PIN)
- Too many alerts
- Too many alerts to one person
- Form, document, or report generation errors
- Workflow errors
- Alerts or actions pending for more than 'x' minutes

11 Appendix: Helpful Resources

There are several resources available to you for your endeavors into KnowledgeSync.

- [KnowledgeSync Self Deployment Video](#)
- [KnowledgeSync YouTube Video Library](#)
- In the same location where you downloaded this manual
 - KnowledgeSync V10 User Manual
 - KnowledgeSync V10 System Requirements