Oracle® User Productivity Kit
Installation and Administration

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1 Overview and Documentation

This suite of applications provides a synchronized content platform for creating documentation, training, and performance support across the enterprise. Its use is generally limited to a team of content authors and/or subject matter experts. The content is made available to users through a Player, document output, or a Knowledge Center. Content can also be tracked to ensure that users understand and learn the content that authors are providing.

Copyright

Version 11.1.0.2

The following components are available for installation:

Developer – The Developer is the primary content authoring tool that allows you to create and publish content easily. Using a content Library for organization and storage, you can build outlines comprised of various documents such as modules/sections, topics, glossaries, questions, and assessments. Content can then be enhanced with additional assets such as conceptual web pages, package content (such as documents, spreadsheets, presentation slide decks, web sites, flash content, HTML pages), role assignments, and so on. Content can then be published as playable simulations, various flavors of documentation output (such as job aids, training guides, instructor manuals, test and system process documents), and context-sensitive, in-application support, help systems. The Developer can be installed for one author or as a collaborative and centralized platform for authoring teams, subject matter experts, content reviewers, and so on.

Knowledge Center – The Knowledge Center is a centralized platform for content deployment, tracking, and reporting. The Knowledge Center provides the infrastructure and tools for importing, organizing, and deploying content created in the Developer (and other applications), managing users and the content that is made available to them, tracking how deployed content is used, and reporting on the content that is consumed. The extent of these capabilities depends on whether you are using the Standard edition (basic usage tracking and reporting) or the Professional edition (more sophisticated user and content management, content organization and deployment, usage tracking, and reporting capabilities typically found in learning content management systems).

You might be interested to note that all of this documentation/help was authored and published using this product.

Documentation consists of the following manuals and help systems. The PDF manuals are delivered and stored in the **documentation\language code\reference** folder where the Developer is installed. Help systems and some PDF manuals are available when you launch each product component such as the Developer, Player, Knowledge Center, and so on. Documentation can also be accessed from the documentation shortcut on the Windows Start program menu.

Content on functionality available in the Professional edition is also included in this documentation and identified as such by the phrase "available only in the Professional edition".

- **Installation and Administration**: This PDF manual provides instructions for installing the Developer in a single-user or multi-user environment as well as information on how to add and manage users and content in a multi-user installation. An Administration help system also appears in the Developer for authors configured as administrators. This manual also provides instructions for installing and configuring the Knowledge Center, including the Content Root (or content repository), and the User Import Utility.

- **Content Development**: This help system and PDF manual provides information on how to create, maintain, and publish content using the Developer. The content of this manual also appears in the Developer help system.

- **Content Deployment**: This PDF manual provides information on how to deploy content created in, and published from the Developer.

- **Content Player**: This help system provides instructions on how to view content using the Player.

- **Reports Management**: This help system and PDF manual provides instructions on how to run and manage usage tracking and other reports.

- **User and Content Management**: This help system and PDF manual provides instructions on how to create user accounts, user groups, and knowledge paths, import content, and server management.

- **In-Application Support**: This help system and PDF manual provides information on how to implement content-sensitive, in-application support for enterprise applications using Player content.

- **Upgrade**: This PDF manual provides information on how to upgrade from a previous version to the current version.

- **Knowledge Center**: This help system provides instructions on how to use the Knowledge Center options such as Knowledge Paths, Notes and Mentoring, and so on.

2 Developer Installation Overview

The Developer uses client/server architecture to provide content authoring functionality for large, distributed development teams as well as single users. The Developer provides the following capabilities:

- Version control, including history and rollback to previous versions of a document.
- Author identification and authentication.
- Author-controlled document check out and check in, including the ability to check out documents for an extended period of time.
- Support for both online and offline authoring.
- Ability to access the development server through an intranet (WAN) or the Internet.
- Ability to configure one client to access multiple content sources.

2.1 The Server

The server manages the content created in the Developer. The server is built to store this information in a reliable and consistent manner as well as service multiple client workstations in an efficient and scalable manner.

The server has two components: the server software and a database that holds the content, called the Library. The server requires that the World Wide Web service be running under Microsoft Internet Information Server (IIS) and a database. The database may also be stored on a separate server.

The Server Software

The server software contains all of the logic for managing and securing the data within the Library. It handles all operations on the data included in the Library. The server software responds to requests from the client desktops including:

- Adding new documents to the Library.
- Locking (checking out) documents to an individual user.
- Writing changes to the Library.
- Adding or modifying authors who have access to the Library.
- Retrieving documents from the Library.

The Content Library

The Content Library is a database that stores all data shared by multiple authors in the development environment. There are two basic types of data: the content and the server data.

The database includes all content that is created such as topics, web pages, packages, modules, sections, keywords, glossaries, and roles. In addition, the Library also stores templates and publishing styles.

The server data is used for running the server. This data includes information about the authors who can connect to the Library, the status of a document in the development process, or the ownership of a document.

2.2 The Client

The client computer requires an installation of the Developer. The client also contains a client database (also referred to as the document cache) that is used and managed by the client desktop software.

The use of the client database provides the following:

- Enables caching content on the client workstation for faster access.
- Allows authors to create and modify content when not connected to the server.
- Allows authors to continue working when the connection to the server is intermittently lost.
- Allows authors to make content changes locally, or cancel the changes, before committing them to the server.

The Client Database

The client database is stored in the Documents and Settings folder by default on the local workstation, but you can change the location if desired. It has two parts. One part contains copies of all documents that the author views, all newly created documents before they are written to the server through the check in process, and all changes made to a document prior to being written to the server.

The second part of the database is a "catalog" or listing of all of the documents in the server Library. When an author is online and connected to the server, the list refreshes automatically at default intervals.

2.3 Deployment Methods for Server/Client

A multi-user development environment uses an application server. There are several deployment methods you can use for this environment.

2.3.1 Single Server

In its simplest configuration, the Developer requires a single server installation and one or more client workstations. The server software and the database reside on the same server. The server and the client workstations are on the same network.

2.3.2 Multiple Servers

The Developer can also be configured such that the server software and database server are on separate servers. This may be necessary in a situation where a database server might be shared among multiple application servers. In this configuration, all communication from the client software is with the Developer server. The server is the only component that establishes communication with the database server.

2.3.3 Server Access through Internet

It is also possible to access the server through the Internet. All communication between the client desktop and the server is through Web Services using HTTP.

2.3.4 Multiple Libraries

The Developer server can also support multiple libraries on the same physical server. The users would have multiple Profiles, one for each Library.

2.3.5 Remote and Virtual Environments

The Developer can operate in remote and virtual environments such as Citrix and VMware. The following are known issues when operating the Developer in these environments:

Citrix:

- When recording a target application running in a Citrix session, then Developer must be running in the same Citrix session.
- Sound output will likely be choppy.
- Citrix does not pass the [PrintScreen] key to applications running in seamless windows. The Developer uses the [PrintScreen] key as the default key for recording topics. Therefore, the Recorder will not properly recognize the [PrintScreen] key in a Citrix seamless window. The recording key can be changed in the Options dialog box in the Developer.

VMware:

- The only known issue is that the Do It! mode default shortcut for advancing frames is Ctrl-Alt. In VMWare, Ctrl-Alt releases the mouse from the VM. This can cause a conflict and release the mouse from the VM rather than advance Do It! mode. This is normally only an issue if your VMTools are not up to date. If they are up to date, then Do It! mode properly advances. Otherwise, you can always change the Do It! mode key in the Preferences dialog box.

3 Developer Installation

The Developer can be installed in either a single or multi-user configuration. In a single user configuration, the content author accesses the application and all content on their local workstation. The Developer and the database are both stored on the local workstation. In a multi-user configuration, the server software and the content Library are installed on a central server. A client is installed on each content author's computer to connect to the server.

Service Pack Note: After the Developer is installed, you may receive service pack updates. You can install these updates without having to re-install the Developer. See *Service Pack Installation* in this manual for more information.

3.1 3rd Party Application Installation

Third-party applications are required for installation of the following components:

- Developer server and client in a multi-user installation
- Single user installation
- Knowledge Center

If the applications are not already present on the machine, the installer notifies you which applications are needed. If you choose to continue the installation, the necessary applications are installed.

The files necessary to install most third-party applications are included in the installation media, with one exception. The exception is Microsoft .NET Framework. In this case, the installation file is a "bootstrap", which connects to the Internet and installs the .NET Framework from there.

If an Internet connection is not available, or you will be redistributing the software installation within your organization, you can include the full .NET Framework installation file in the .NET Framework into the installer. In addition to the full .NET Framework installer, you will also need to download language packs for French, German, Japanese, Spanish, and Dutch.

If you decide to add the .NET Framework to the software installation media, you must be aware of three things:

- You must download the Microsoft .NET Framework version 4.0.
- You must create a folder structure within the production installation media with the names exactly as specified in the steps below, or the installer will not function properly.
- You must download the appropriate language packs.

To embed the full .NET Framework installation file into the software installer:

1. Copy the Setup files to a local or network drive to which you have rights to make folders and add files.
2. Within the setup file structure, navigate to and open the **third party files** folder and then the **DOTNET** folder.
3. Within the **DOTNET** folder, create a new folder named **dotnet language pack**.

   Note: Remember that all folders MUST be named correctly for the installation process

to work correctly.

4. Within the **dotnet language pack** folder, create folders named **French**, **German**, **Japanese**, **Spanish** and **Dutch**.
5. Launch your Browser and go to the **www.microsoft.com/downloads** site.
6. In the **Search All Download Center** field, enter **.NET Framework 4.0**.
7. Click the **Search Microsoft.com** link.
8. Click the **.net framework 4.0 download** link and press ENTER.
9. In the Search Results screen, click the **Download .NET Framework** link.
10. Click the **.NET 4 Framework Standalone version** link.
11. Click the **DOWNLOAD** link.
12. Save the **dotNetFx40_Full_x86_x64.exe** file to the **third party files\DOTNET** folder.
13. Scroll up to the **Search All Download Center** field.
14. Enter **.NET Framework 4.0 language pack** in the Search field.
15. Click the **Search Microsoft.com** link in the dropdown list and press ENTER.
16. Click the **Microsoft .NET Framework 4 Full Language Pack (x86 x64)** link.
17. Click the **Change Language** list and select **French**.
18. Click **Télécharger**.
19. Save the **dotNetFx40_Full_x86_x64fr.exe** file to the **third party files\DOTNET\dotnet language pack\French** folder.
20. Repeat the steps for German, Japanese, Spanish, and Dutch.

3.2 Single User Installation

In this installation, the Developer software and the content database are installed on the local workstation.

File System Permissions

The file system permissions must be set correctly in the folder where the Developer is installed. You must have at least the following:

- Folder where the Developer is installed
  Permissions: Read, List, Execute

- Data directory folder (C:\Documents and Settings\<username>\Local Settings\Application Data OR C:\Users\<username>\AppData\Local)
  Permissions: Read, List, Modify, Delete

  Note: In a default Microsoft Windows installation, the user has full control over this directory.

To install the Developer, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose

the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click Browse to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the Configuration list, select **Developer Single User**.

- **Language Selection**: Choose the language for the Developer server and library. This sets the default language for the templates and publishing styles in the library.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0.

- **Select Program Folder**: This screen appears if you selected **Server and Client** from the Configuration list on the Setup Type screen. You can indicate the desired program folder or accept the default.

- **Choose Destination Location**: You can accept the default target location, or click **Change** to specify a different one.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed.

- **Install Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

3.3 Multi-user Installation

In a multi-user installation, the Developer application files are installed on a server, and a virtual directory is created on a web site. The web site is necessary so that the content authors can connect to the server through the HTTP protocol. This allows content authors to connect to the server from remote locations through a client installation. During installation, you can choose to install the client on the server as well.

A multi-user installation also requires a database server for the content Library. The database server and the web server do not need to be on the same computer. The installation process can create the database and all necessary tables on the specified server, or you can also run scripts to install the database manually.

Note: The web server and the database server must be in the same local network.

Before you begin the installation, you should decide whether you will use the scripts to create the database manually or use the installer software to create the database automatically. If you choose to install the database using the scripts, refer to the *Install the Database Manually* section, following this topic. If you choose to let the installer create the database, refer to the *Install the Server* section.

Note: If you choose to install the database and the server separately, you must install the database first.

3.3.1 Install the Developer Database Manually

You can install the Developer database manually by running the scripts provided with the software. If you are using an Oracle Database, a script creates the schema, populates it with the appropriate objects, and creates an application user for the schema. If you are using a Microsoft SQL Server, one script creates the database and the database user, and a second script populates the database with the appropriate objects.

You must have the proper administrative credentials for the database server to create and populate the schema or database.

Note: A Microsoft SQL Server must be configured with mixed mode authentication.

To install the database manually on an Oracle Database server:

1. From the Windows Start menu, open a Command Prompt window.
2. To create the schema using the **CreateSchemaObjects.sql** script located in **\db scripts\ORACLE\Developer** in the software installation files, enter the following at the command prompt:

   sqlplus - SQL*Plus is the command line application for Oracle Database.

   -s - Run SQL*Plus without SQL*Plus messaging.

   <adminuser> - The administrative user for the instance of the Oracle server.

   <adminpwd>@<instance> - The password for the administrative user and the name of the instance.

   <scriptlocation>\<scriptname> - The path to the location of the script and the name of the script to be run.

   schema_owner - The schema owner name is limited to 20 characters.

   password - This will be the password used for the schema owner account and the schema_app account (this account is created automatically).

   tablespace - The name of the tablespace.

   tablespace_datafile - The tablespace location plus the name of the tablespace you used in the previous parameter.

   Statement with generic parameters:
   sqlplus -s <adminuser>/<adminpwd>@<instance> @"<script location>\<script name>" schema_owner password tablespace tablespace_datafile

   Example with default install parameters:
   sqlplus -s system/password@xe @"E:\Setup\db scripts\ORACLE\Developer\CreateSchemaObjects.sql" ODServer password ODDevContent "C:\app\Administrator\oradata\orcl\ODDevContent.DBF"

3. Confirm the parameters and run the script.

To install the database manually on a Microsoft SQL Server:

1. From the Windows Start menu, open a Command Prompt window.

2. To create the database using the **CreateDB.sql** script located in **\db scripts\MSSQL\Developer** in the software installation files, enter the following at the command prompt:

   sqlcmd - The command line application for the Microsoft SQL Server.

   -E - Use a trusted connection to the Microsoft SQL Server. To use a login and password, use the -U <LOGINID> -P <password> parameters.

   -S <servername> - The name of the Microsoft SQL Server.

   -i "<scriptfile>" - The path to the script file and the name of the script file.

   -v DBName="<database name>" - The name of the database to be created.

   -v DBPath="<database file location"> - The path to the location where you want to create the database.

   Statement with generic parameters:
   sqlcmd -E -S <servername> -i <scriptfile> –v DBName="<VALUE1>" -v DBPath="<VALUE2>"

   Example with default install parameters:
   sqlcmd -E -S "mysqlserver" -i "E:\Setup\db scripts\MSSQL\Developer\CreateDB.sql" -v DBName="ODDevContent" -v DBPath="C:\database"

3. Confirm the parameters and run the script.

4. To create the database objects using the **CreateDBObjects.sql** script located in **\db scripts\MSSQL\Developer** in the software installation files, enter the following at the command prompt:

   -E - Use a trusted connection to the Microsoft SQL Server. To use a login and password, use the -U <LOGINID> -P <password> parameters.

   -S <servername> - The name of the Microsoft SQL Server.

   -i "<scriptfile>" - The path to the script file and the name of the script file.

   -v DBOwner="<owner name>" - The database account that will own the database. If the account does not exist, it will be created.

   -v Password="<Password"> - The password for the database owner account.

   -v DBName="<database name>" - The name of the database created in the previous script.

   Statement with generic parameters:
   sqlcmd -E -S <servername> -i <scriptfile> -v DBOwner="<VALUE1>" -v Password="<Value2>" –v DBName="<VALUE3>"

   Example with default install parameters:
   sqlcmd -E -S "mysqlserver" -i "E:\Setup\db scripts\MSSQL\Developer\CreateDBObjects.sql" -v DBOwner="ODServer" -v Password="password" -v DBName="ODDevContent"

5. Confirm the parameters and run the script.

6. Close the Command Prompt window.

3.3.2 Install the Server

To install the Developer server, you must have administrator privileges to the computer on which you are installing it, or at least have necessary permissions to install software.

Before you install the Developer server, you will need the following information.

Setup Requirements for the Server

The server setup requires the IIS Admin and WorldWide Web Publishing services to be running. If they are not running, the setup program will attempt to start them; if they cannot be started, the installation will be aborted.

Authentication Methods

The Developer can authenticate users in one of two different security modes:

- **Microsoft Windows**: All login authentication to the Developer is done through Microsoft Windows. The system checks the Microsoft Windows account under which the user has logged in to the local computer.

- **Standard**: All login authentication to the Developer is done through accounts stored in the Developer database.

Note: Changing security authentication methods after installation will result in technical issues.

Profile Credentials

During server installation, you will be prompted to enter credentials for an administrator account for the Developer Library. If you are installing with the Standard authentication method, you must enter a user name and password and confirm the password. If you are installing with the Microsoft Windows authentication method, you can choose to use the Microsoft Windows account of the person installing the server or enter the information for a different Microsoft Windows login account.

Secure Web Site and SSL

If a secure web site is available, the installer defaults to that web site. While you can also install on a non-secure web site, using a secure web site and SSL is the recommended method of deployment for the web services, because SSL:

- encrypts authentication data (username and password, session cookies) so it is not transported in clear text across networks

- encrypts sensitive data

- authenticates that the web server is being accessed by users who are who they say they are

- protects data that should be accessed by certain users, and not accessed by others

Secure Web Site and Mixed Protocols

The default behavior for the Web Client Framework does not allow mixed protocols. For example, if the server on which you install the Developer uses http protocol behind a reverse proxy using http and the client comes from the outside through https, or, the Developer server and the reverse proxy are https and the client is http, the user will receive an AddressFilter mismatch error when attempting to log in. You can edit the configuration to allow mixed protocols.

To allow mixed protocols:

1. Locate the **web.config** file in the Repository.WCF folder in the folder where the Developer is installed on the server.
2. Open the **web.config** file in any text editor.
3. Search for the following tag:

   <addressFilter filterMode="Exact"/>
4. Edit the tag as follows:

   <addressFilter filterMode="Any"/>
5. This tag appears twice in the file. Search for the second tag and repeat step 4.
6. Save and close the web.config file.

Change Protocols After Installation

You can install the Developer server on either a secure (SSL) or unsecure (non-SSL) server. If necessary, you can change the protocol after installation; for example, if you attach a certificate to web site, you can change the protocol for the Developer server.

To convert the Developer server from non-SSL to SSL:

1. Install and run the Developer server on a non-SSL web site.
2. Log in to the Developer and create a profile, using the HTTP bound web site URL for the Library Location.
3. Exit the Developer.
4. Apply the certificate and HTTPS bindings to web site on which the Developer server is installed.
5. Navigate to the installation location and open the Repository.WCF\web.config file in the editor of your choice.
6. Locate the XML value for the node configuration/system.serviceModel/bindings/basicHttpBinding/binding. There should only be one "name" attribute.
7. Locate the “security” key located within the key and change the "mode" attribute from “None” or "TransportCredentialOnly" to "Transport".
8. Locate the XML value for the node configuration/system.serviceModel/bindings/customBinding/binding/upkHttpsTransport . There should only be one node with this name.
9. Rename the node from upkHttpsTransport to httpsTransport.
10. Save the changes and close the web.config file.
11. Log in to the Developer using the Profile with the original non-SSL Library Location. If the HTTP binding has been removed from the site, you can open the Profile as Disconnected.
12. On the **Tools** menu, choose **Profiles**.

13. If you are in the profile that is on the affected web site, click **Exit Profile**, then select the profile to modify and click **Edit**.

14. In the Profile wizard, edit the Library Location URL to point to the new SSL location.

15. Log in to the Developer and verify it works.

To convert a Developer server from SSL to non-SSL:

1. Install and run the Developer server on a SSL web site.

2. Log in to the Developer and create a Profile, using the HTTPS bound web site URL for the Library Location.

3. Exit the Developer.

4. Navigate to the installation location and open the **Repository.WCF\web.config** file in the editor of your choice.

5. Locate the XML value for the node configuration/system.serviceModel/bindings/basicHttpBinding/binding. There should only be one "name" attribute.

6. Locate the "security" key located within the key and change the "mode" attribute from "Transport" to "None".

7. Locate the XML value for the node configuration/system.serviceModel/bindings/customBinding/binding/httpsTransport. There should only be one node with this name.

8. Rename the node from httpsTransport to upkHttpsTransport.

9. Save the changes and close the web.config file.

10. Remove the certificate and HTTPS bindings from the web site to be affected, if desired.

11. Ensure the HTTP binding is allowed on the web site.

12. Log in to the Developer using the Profile with the original SSL Library Location. If the HTTPS binding has been removed from the site, you can open the Profile as Disconnected.

13. On the **Tools** menu, choose **Profiles**.

14. If you are in the profile that is on the affected web site, click **Exit Profile**, then select the profile to modify, and click **Edit**.

15. In the Profile Wizard, edit the Library Location URL to point to the new non-SSL location.

16. Log in to the Developer and verify it works.

Folder Permissions

The installer will check the folders listed below for the following permissions, and apply the permissions where necessary.

- **C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319**

  Windows Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute,

List Folder Contents, Read

Standard Authentication
ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\Temporary ASP.NET Files**

  Windows Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **C:\WINDOWS\Microsoft.NET\Framework64\v4.0.30319**

  Windows Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **C:\WINDOWS\Microsoft.NET\Framework64\v4.0.30319\Temporary ASP.NET Files**

  Windows Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **C:\WINDOWS\Temp (Special permissions)**

  Windows Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  Standard Authentication

ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **Install Directory (C:\Program Files...\Repository.WCF) or any local drive (D:\...\Repository.WCF)**

  Windows Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **<Oracle folder>**

  Windows Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

Database Access

If you choose to install the database at the same time as you install the application files on the server, you will be prompted for two sets of credentials for the database. The first set is for an account that the installer can use to create the database. You must use an existing account for this set of credentials, and the account must have permissions to create databases and logins.

Note: A Microsoft SQL Server must be configured with mixed mode authentication.

The second set of credentials is used for the Web Services access for the Developer to read from and write to the database. This can be a pre-existing login, for which you must supply the correct login name and password, or you can specify a new login name and password. The installer grants this account access to the database and adds it to the appropriate roles.

To install the server with an Oracle database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the **Configuration** list, select **Developer Server** or **Developer Server and Client**.

- **Language Selection**: Choose the language for the Developer server and library. This sets the default language for the templates and publishing styles in the library.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0. Note also that the HTTP Activation service must be installed on the server prior to installing on a Windows 2012 server.

- **Select Program Shortcuts**: When you are installing the client along with the server, you can choose to install the full Developer or Record It! or both. The full client has all the functionality of the Developer. Record It! is a light version of the Developer, optimized for recording topics. At least one shortcut must be selected.

- **Select Program Folder**: This screen appears if you selected **Server and Client** from the Configuration list on the Setup Type screen. You can indicate the desired program folder or accept the default.

- **Choose Destination Location**: You can accept the default target location, or click **Change** to specify a different one.

- **Choose Web Site**: The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

  Note: The web server and the database server must be in the same local network.

- **Web Site Options**: This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.

- **Database System**: Choose **Oracle Database**.

  Note: The web server and the database server must be in the same local network.

- **Oracle .NET Data Provider**: A specific version of the Oracle .NET Data Provider must be installed for the Developer to work correctly. This screen appears if the correct version is not present. In the **Path** field, enter the physical location to which you want to install the software. In the **Name** field, enter the name of the Oracle Home.

- **SQL Script Options**: If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let**

the installer run them option.

- **Internet Information Services Option**: During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.

- **Oracle Database Login**: If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to create the schema and the tablespace. If the scripts have already been run to create the database, enter a user name, password and host string that has access to the user schema created to run the application. If the scripts have already been run, the Profile Credentials screen appears next.

  Note: Host String represents the name you assign for TNS connectivity in the tnsnames.ora file. This typically identifies the machine, port number and SID of the Oracle database. If you need to connect to a remote Oracle database you will need to supply the host:port/service_name; for example, "myservername:1521/orcl". In some environments a tnsname.ora might not be present. If you are not sure, it is highly recommended that you supply the host/service_name or host:port/service_name (if remote).

- **Choose Schema**: Specify a tablespace name, user name, and password and confirm the password. The user name is limited to 20 characters. The tablespace name is the name of the tablespace that will be created or used during the installation; the user name is the user name that will be created or associated with the schema.

- **Profile Credentials**: If you chose to install the server with standard authentication, enter a user name and password for the default admin user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.

- **Folder permission**: The server or server and client installation needs certain permissions to complete the installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue.

  Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation will fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.

- **Installshield Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

To install the server with a Microsoft SQL Server database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the **Configuration** list, select **Server** or **Server and Client**.

- **Language Selection**: Choose the language for the Developer server and library. This sets the default language for the templates and publishing styles in the library.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0. Note also that the HTTP Activation service must be installed on the server prior to installing on a Windows 2012 server.

- **Select Program Shortcuts**: When you are installing the client along with the server, you can choose to install the full Developer or Record It! or both. The full client has all the functionality of the Developer. Record It! is a light version of the Developer, optimized for recording topics. At least one shortcut must be selected.

- **Select Program Folder**: This screen appears if you selected **Server and Client** from the Configuration list on the Setup Type screen. You can indicate the desired program folder or accept the default.

- **Choose Destination Location**: You can accept the default target location, or click **Change** to specify a different one.

- **Choose Web Site**: The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

- **Web Site Options**: This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.

- **Database System**: Choose **Microsoft SQL Server**.

  Note: The web server and the database server must be in the same local network.

- **SQL Script Options**: If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.

- **Internet Information Services Option**: During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.

- **Microsoft SQL Server Login**: From the **Database server** list, select the desired Microsoft SQL Server. If the scripts have not been run, select Windows Authentication or SQL Server Authentication to connect to the database. If you select Microsoft SQL Server authentication, enter an existing login name and password that has database administrator access to the server.

- **Choose Database**: Accept the default name for the database or enter a custom name. If you have already run the scripts, you must use the name of the database you created. Specify an existing database user ID and password and confirm the password, if necessary, or, if you have not run the scripts, you can also specify a new database user ID and password. The installer will create the login, if necessary, grant the login access to the database, and give it the appropriate permissions. If you ran the scripts to create the database, you must use the login you created.

- **Profile Credentials**: If you chose to install the server with standard authentication, enter a user name and password for the default admin user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.

- **Folder permission**: The server or server and client installation needs certain permissions to complete the installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue.

  Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation will fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click Back to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.

- **Installshield Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

3.3.3 Install the Developer Client

To install the Developer Client, you will need the following information from your administrator.

- The name of the web server and virtual directory where the Library is located.

- Your user credentials: either your Microsoft Windows login account, or a user name and password that your administrator has created.

File Permissions on the Client

The file system permissions must be set correctly in the folder where the Developer is installed. You must have at least the following:

- Folder where the Developer is installed
  Permissions: Read, List, Execute

- Data directory folder (C:\Documents and Settings\<username>\Local Settings\Application Data OR C:\Users\<username>\AppData\Local)
  Permissions: Read, List, Modify, Delete

  Note: In a default Microsoft Windows installation, the user has full control over this directory.

To install the client, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the **Configuration** list, select **Developer Client**.

- **Language Selection**: Choose the language for the Developer server and library. This sets the default language for the templates and publishing styles in the library.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0.

- **Select Program Shortcuts**: When you are installing the client, you can choose to install the full Developer or Record It! or both. The full client has all the functionality of the Developer. Record It! is a light version of the Developer, optimized for recording topics. At least one shortcut must be selected.

- **Select Program Folder**: This screen appears if you selected **Server and Client** from the Configuration list on the Setup Type screen. You can indicate the desired program folder or accept the default.

- **Choose Destination Location**: You can accept the default target location, or click **Change** to specify a different one.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.

- **Installshield Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

3.3.4 Install Developer Servers for a Load-Balanced Multi-user Environment

When setting up a multi-user development environment using load balancing technology, the development configuration must be the same on each of the Developer servers used in the environment. When load balancing the Developer database, an exact replica must be maintained or synchronized across databases. In the setup example below, it is assumed that you are using multiple Developer servers and one Developer database.

Note: When using Windows authentication, each server must be able to get authentication for the Windows users. That is, all servers should be able to get authentication for all Windows accounts rather than each knowing a subset of users. This is most likely to work when the servers are all within the same Windows domain.

To install the Developer servers for a load-balanced multi-user environment:

1. Install the Developer server to the first server as desired. Make a note of your chosen Application (virtual directory) name, Authentication mode and Database configuration.

2. Run the installer for all subsequent Development servers, using the information below for the screens indicated:

   Choose Web Site: The application and authentication mode must be the same as the first server noted in step 1.

   Database System: Select the database option used in the first server noted in step 1.

   SQL Script Options: Click the **Yes, the scripts have already been run for this version** option.

   Internet Information Services Option: Click the **Yes, continue with the installation** option.

   Oracle Database Login or **Microsoft SQL Server Login**: Enter the database information used in the first server noted in step 1.

   Schema Options or **Database Options**: Choose the **Use existing schema** or **Use existing database option**.

3. Install and configure the Developer clients as desired, including using the administrator account to give users access to Developer (or create users if Standard authentication is used).

3.4 Uninstall the Developer

If you need to uninstall the Developer, you use the Microsoft Windows Add/Remove Programs utility in Control Panel. There may be several entries for the Developer (depending on what you have installed), as listed below. Before beginning the uninstall process, you should exit the Developer application.

- <product name> Server
  Removed: The software application files on the server.

- <product name> Client
  Removed: The software application files on the client computer.

- <product name>Single user
  Removed: The software application on the client computer.

- Standalone Topic Player
  Removed: The web plug-in files.

Uninstalling the application files does not remove content or files in the local storage location. If you want to delete the content, delete your profile before uninstalling the Developer. Deleting the profile deletes the content permanently.

To uninstall the Developer:

1. On the Microsoft Windows desktop, click the **Start** menu.
2. Click **Settings**.
3. Click **Control Panel**.
4. Launch **Add/Remove Programs**.
5. Scroll the list as necessary and click the Developer entry you want to uninstall.
6. Click **Change/Remove** and follow the steps to uninstall the item.

3.5 Language Support

The Developer provides localization support based on component tier such as the software user interface, installed content, and product documentation.

These tier one components are localized into the following languages: English, French, German, Spanish (Spain), Dutch, and Japanese.

Software User Interface

- Setup
- Developer
- User Import Utility
- Player
- Knowledge Center
- Knowledge Center Manager
- Knowledge Center Reports

Installed Content

- Standard and Microsoft Template Text
- Static text in Document formats such as System Process, Training Guide, and so on.
- System folder and document names in the Library that are included at the time of installation.

Product Documentation

- All PDF and help documentation is translated.

The following tier two components are localized into these languages: English, French, German, Spanish (Spain), Dutch, Japanese, Chinese (Traditional and Simplified), Danish, Italian, Norwegian, Portuguese, Swedish, Spanish (Mexico, Latin America, South America), French (Quebec), Russian, Hungarian, Finnish, Polish, Korean, Czech, and Turkish.

Software User Interface

- Player
- Knowledge Center Player

Installed Content

- Standard and Microsoft Template Text
- Static text in Document formats such as System Process, Training Guide, and so on.

Product Documentation

- Player and Knowledge Center Player help

4 Knowledge Center Installation

To track how deployed content is used and report on content usage, you must install the Knowledge Center. The Knowledge Center provides the infrastructure and tools for importing, organizing, and deploying content created in the Developer (and other applications), managing users and the content that is made available to them, and tracking and reporting. The extent of these capabilities depends on whether you are using the Standard edition (basic usage tracking and reporting) or the Professional edition (more sophisticated user and content management, content organization and deployment, usage tracking, and reporting capabilities typically found in learning content management systems).

Knowledge Center is installed on a central server, and users access it through their browser. In addition, a content repository called a content root is created in a folder on the server. This folder contains all installed content.

4.1 Installation

For Knowledge Center installation, the application files are installed on a server, and two virtual directories are created on a web site. The web site is necessary so that the training managers can connect to the server through the HTTP protocol. This allows training managers to connect to Knowledge Center from remote locations through an internet browser.

Knowledge Center installation also requires a database server for the content and tracking information. The installation process creates the database and all necessary tables on the specified server, or you can run scripts to install the database manually. The database server and the web server do not need to be on the same computer.

Note: The web server and the database server must be in the same local network.

Before you begin the installation, you should decide whether you will use the scripts to create the database manually or use the installer software to create the database automatically. If you choose to install the database using the scripts, refer to the *Install the Knowledge Center Database Manually* section, following this topic. If you choose to let the installer create the database, refer to the *Install Knowledge Center* section.

Note: If you choose to install the database and the server separately, you must install the database first.

4.1.1 Install the Knowledge Center Database Manually

You can install the Knowledge Center database manually by running the scripts provided with the software. You must have the proper administrative credentials for the database server to create and populate the schema or database.

Note: A Microsoft SQL Server must be configured with mixed mode authentication.

Warning: It is necessary to run the SQLPlus command line application for Oracle and the SQLCmd command line application for Microsoft SQL from the folder location that contains the script you are running.

To install the database manually on an Oracle Database server:

1. From the Windows Start menu, open a Command Prompt window.
2. Using the cd command, change into the folder where the scripts are located in the software installation files; for example, if the files are located on the C: drive in a temp folder:

   cd c:\temp\setup\db scripts\ORACLE\KnowledgeCenter

3. Enter **sqlplus**, and at the SQLPlus command prompt, enter the user name and password of the administrator account to connect to the Oracle database.

4. To create the schema using the **CreateSchemaObjects.sql** script, enter the following at the command prompt:

   <scriptname> - The name of the script to be run.

   schema_owner - The schema owner name is limited to 20 characters.

   password - This will be the password used for the schema owner account and the schema_app account (this account is created automatically).

   tablespace - The name of the tablespace.

   tablespace_datafile - The tablespace location plus the name of the tablespace you used in the previous parameter.

   temp_tablespace - The tablespace name plus _temp.

   temp_tablespace_datafile - The tablespace location plus the name of the tablespace you used in the previous parameter.

   Statement with generic parameters:
   @"<script name>" schema_owner password tablespace tablespace_datafile temp_tablespace temp_tablespace_datafile

   Example with default install parameters:
   @"CreateSchemaObjects.sql" KUser password KMaster "C:\app\oradata\orcl\KMaster.DBF" KMaster_TEMP "C:\app\oradata\orcl\KMaster_TMP.DBF"

5. Confirm the parameters and run the script.

To install the database manually on a Microsoft SQL Server:

1. From the Windows Start menu, open a Command Prompt window.

2. Using the cd command, change into the folder where the scripts are located in the software installation files; for example, if the files are located on the C: drive in a temp folder:

   cd c:\temp\setup\db scripts\MSSQL\KnowledgeCenter

3. To create the database using the **CreateDB.sql** script, enter the following at the command prompt:

   sqlcmd - The command line application for the Microsoft SQL Server.

   -E - Use a trusted connection to the Microsoft SQL Server. To use a login and password, use the -U <LOGINID> -P <password> parameters.

   -S <servername> - The name of the Microsoft SQL server.

   -i "<scriptfile>" - The path to the script file and the name of the script file.

   -v DBName="<database name>" - The name of the database to be created.

   -v DBPath="<database file location"> - The path to the location where you want to create the database.

Statement with generic parameters:
sqlcmd -E -S <servername> -i <scriptfile> -v DBName="<VALUE1>" -v DBPath="<Value2>"

Example with default install parameters:
sqlcmd -E -S "mysqlserver" -i "CreateDB.sql" -v DBName="KMASTER" -v DBPath="C:\database"

4. Confirm the parameters and run the script.

5. Next, to create the database objects using the **CreateDBObjects.sql** script, enter the following at the command prompt:

   Statement with generic parameters:
   sqlcmd -E -S <servername> -i <scriptfile> -v DBOwner="<VALUE1>" -v Password="<Value2>" –v DBName="<VALUE3>"

   Example with default install parameters:
   sqlcmd -E -S "mysqlserver" -i "CreateDBObjects.sql" -v DBOwner="KUSER" -v Password="KUSER" -v DBName="KMASTER"

6. Confirm the parameters and run the script.

4.1.2 Install Knowledge Center

To install the Knowledge Center server, you must have administrator privileges to the computer on which you are installing it, or at least have necessary permissions to install software.

Before you install the Knowledge Center, you will need the following information.

Setup Requirements for the Server

The server setup requires the IIS Admin and WorldWide Web Publishing services to be running. If they are not running, the setup program will attempt to start them; if they cannot be started, the installation will be aborted.

Authentication Methods

The Knowledge Center can authenticate users in one of two different security modes:

- **Microsoft Windows:** All login authentication to the Knowledge Center is done through Microsoft Windows. The system checks the Microsoft Windows account under which the user has logged in to the local computer.

- **Standard:** All login authentication to the Knowledge Center is done through accounts stored in the Knowledge Center database.

Note: Changing security authentication methods after installation will result in technical issues.

Secure Web Site and SSL

If a secure web site is available, the installer defaults to that web site. While you can also install on a non-secure web site, using a secure web site and SSL is the recommended method of deployment for the web services, because SSL:

- encrypts authentication data (username and password, session cookies) so it is not transported in clear text across networks

- encrypts sensitive data

- authenticates that the web server is being accessed by users who are who they say they are
- protects data that should be accessed by certain users, and not accessed by others

Change Protocols after Installation

You can install the Knowledge Center server on either a secure (SSL) or unsecure (non-SSL) server. If necessary, you can change the protocol after installation; for example, if you attach a certificate to web site, you can change the protocol for the Knowledge Center server.

To convert the Knowledge Center server from non-SSL to SSL:

1. Install and run the Knowledge Center server on a non-SSL web site.
2. Apply the certificate and HTTPS bindings to the web site on which the Knowledge Center server is installed.
3. Log in to Knowledge Center as an administrative user under the HTTP binding.
4. Click the **Manager** link.
5. In Manager, point to the **More** option and choose **Server**.
6. Change the value in the **Server URL** field to the URL of the web site to which the certificate has been applied.
7. Click **Save** to save your changes.
8. Point to the **More** option and choose **Content Roots**.
9. From the list of content roots, click **Edit** for a content root on the affected web site.
10. Change the value in the **URL (http)** field to the URL of the web site to which the certificate has been applied.
11. Save the changes.
12. Click the **Back to List** link.
13. Repeat steps 9 - 12 for each affected content root.
14. Log out of Knowledge Center.
15. Navigate to the installation location and open the \Web Server\KCenter\web.config file in the editor of your choice.
16. Locate the XML value for the node configuration/appSettings/add where the "key" attribute is "KPDATAURL".
17. Change the value to the URL of the web site to which the certificate has been applied.
18. Locate the XML value for the node configuration/system.serviceModel/bindings/basicHttpBinding/binding where the "name" attribute is "BasicHttpBinding_GenericInformationWebServiceWCF".
19. Locate the "security" key located within the key and change the "mode" attribute from "TransportCredentialOnly" to "Transport".
20. Save the changes and close the file.

21. Navigate to the installation location and open the \Web Server\KData\web.config file in the editor of your choice.

22. Locate the XML value for the node configuration/appSettings/add where the "key" attribute is "K_SSL" and change the value to true.

23. Locate the XML value for the node configuration/system.serviceModel/bindings/basicHttpBinding/binding. There should only be one "name" attribute.

24. Locate the "security" key located within the key and change the "mode" attribute from "TransportCredentialOnly" to "Transport".

25. Save the changes and close the file.

Note: If the content roots reside on the affected web site, continue with the following steps. If not, stop here.

1. Navigate to the installation location of the content root and open the web.config file.

2. Locate the XML value for the node configuration/system.serviceModel/bindings/basicHttpBinding/binding where the "name" attribute is "BasicHttpBinding_GenericInformationWebServiceWCF".

3. Locate the "security" key located within the key and change the "mode" attribute from "TransportCredentialOnly" to "Transport".

4. Save the changes and close the file.

5. In the content root installation location, open the \ContentTools\web.config file.

6. Locate the XML value for the node configuration/appSettings/add where the "key" attribute is "K_SSL" and change the value to "true".

7. Save the changes and close the file.

8. Repeat these steps for each affected content root.

9. Log in to Knowledge Center using the HTTPS binding and verify it works.

To convert the Knowledge Center server from SSL to non-SSL:

1. Install and run the Knowledge Center server on an SSL web site.

2. Log in to Knowledge Center as an administrative user under the HTTPS binding.

3. Click the **Manager** link.

4. In Manager, point to the **More** option and choose **Server**.

5. Change the value in the **Server URL** field to the URL of the web site from which the certificate will be removed.

6. Click **Save** to save your changes.

7. Point to the **More** option and choose **Content Roots**.

8. From the list of content roots, click **Edit** for a content root on the affected web site.

9. Change the value in the **URL (http)** field to the URL of the web site from which the certificate will be removed.

10. Save the changes.

11. Click the **Back to List** link.

12. Repeat steps 7 - 11 for each affected content root.

13. Log out of Knowledge Center.

14. Navigate to the installation location and open the \Web Server\KCenter\web.config file in the editor of your choice.

15. Locate the XML value for the node configuration/appSettings/add where the "key" attribute is "KPDATAURL".

16. Change the value to the URL of the web site from which the certificate will be removed.

17. Locate the XML value for the node configuration/system.serviceModel/bindings/basicHttpBinding/binding where the "name" attribute is "BasicHttpBinding_GenericInformationWebServiceWCF".

18. Locate the "security" key located within the key and change the "mode" attribute from "Transport" to "TransportCredentialOnly".

19. Save the changes and close the file.

20. Navigate to the installation location and open the \Web Server\KData\web.config file in the editor of your choice.

21. Locate the XML value for the node configuration/appSettings/add where the "key" attribute is "K_SSL" and change the value to "false".

22. Locate the XML value for the node configuration/system.serviceModel/bindings/basicHttpBinding/binding. There should only be one "name" attribute.

23. Locate the "security" key located within the key and change the "mode" attribute from "Transport" to "TransportCredentialOnly".

24. Save the changes and close the file.

Note: If the content roots reside on the affected web site, continue with the following steps. Otherwise, **skip to step 8**.

1. Navigate to the installation location of the content root and open the web.config file.

2. Locate the XML value for the node configuration/system.serviceModel/bindings/basicHttpBinding/binding where the "name" attribute is "BasicHttpBinding_GenericInformationWebServiceWCF".

3. Locate the "security" key located within the key and change the "mode" attribute from "Transport" to "TransportCredentialOnly".

4. Save the changes and close the file.

5. In the content root installation location, open the \ContentTools\web.config file.

6. Locate the XML value for the node configuration/appSettings/add where the "key" attribute is "K_SSL" and change the value to "false". Save the changes and close the file.

7. Repeat these steps for each affected content root.

8. Remove the certificate and HTTPS bindings from the web site.

9. Ensure the HTTP binding is allowed on the web site where you removed the certificate.

10. Log in to Knowledge Center using the HTTP binding and verify it works.

Content Root Folder

The Content Root is where user content is stored. The ContentTools folder of the Content Root does all the work for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a Windows user with the necessary privileges to perform these tasks. This user can be created by the installer, or can be an existing user on the system.

Folder Permissions

The installer will check the folders listed below for the following permissions, and apply permissions where necessary.

- **C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319**

  Windows Authentication
  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\Temporary ASP.NET Files**

  Windows Authentication
  <ContentTools User> - Read & Execute, Write

  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  <ContentTools User> - Read & Execute, Write

  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **C:\WINDOWS\Microsoft.NET\Framework64\v4.0.30319**

  Windows Authentication
  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

Standard Authentication
ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **C:\WINDOWS\Microsoft.NET\Framework64\v4.0.30319\Temporary ASP.NET Files**

  Windows Authentication
  <ContentTools User> - Read & Execute, Write

  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  <ContentTools User> - Read & Execute, Write

  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **C:\WINDOWS\Temp (Special permissions)**

  Windows Authentication
  <ContentTools User> - Modify

  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  Standard Authentication

  <ContentTools User> - Modify

  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **Install Directory (C:\Program Files...\KData and C:\Program Files...\KCenter) or any local drive (D:\...\KData and D:\...\KCenter)**

  Windows Authentication
  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **<Oracle folder>**

  Windows Authentication
  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  Standard Authentication
  ASPNET (Windows XP only) or NETWORK SERVICE (all other operating systems) - Read & Execute, List Folder Contents, Read

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute, List Folder Contents, Read

- **<Content Root> Directory**

  Windows Authentication
  <ContentTools User> - Read, Write, List Folder Contents, Modify

  Standard Authentication
  <ContentTools User> - Read, Write, List Folder Contents, Modify

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute Only

- **<Content Root>\ContentTools**

  Windows Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute Only

  Standard Authentication
  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute Only

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute Only

- **<Content Root>\Tools**

  Windows Authentication
  <ContentTools User> - Read & Execute Only

  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute Only

  Standard Authentication
  <ContentTools User> - Read & Execute Only

  ASPNET (Windows XP Only) or NETWORK SERVICE (All other OS) - Read & Execute Only

  IUSR_<machinename> (Windows XP or Windows 2003) or IUSR (Windows 2008 or Windows 7 only) or IIS Anonymous Account - Read & Execute Only

- **<Content Root>\bin**

  Windows Authentication
  <ContentTools User> - Read & Execute Only

  Standard Authentication

<ContentTools User> - Read & Execute Only

- **<Content Root>\web.config**

  Windows Authentication
  <ContentTools User> - Read & Execute Only

  Standard Authentication
  <ContentTools User> - Read & Execute Only

Database Access

If you choose to install the database at the same time as you install the application files on the server, you will be prompted for two sets of credentials for the database. The first set is for an account that the installer can use to create the database. You must use an existing account for this set of credentials, and the account must have permissions to create databases and logins.

Note: A Microsoft SQL Server must be configured with mixed mode authentication.

The second set of credentials is used for the Web Services access for the Developer to read from and write to the database. This can be a pre-existing login, for which you must supply the correct login name and password, or you can specify a new login name and password. The installer grants this account access to the database and adds it to the appropriate roles.

To install the server with an Oracle database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the **Configuration** list, select **Knowledge Center**.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0. Note also that the HTTP Activation service must be installed on the server prior to installing on a Windows 2012 server.

- **Setup Requirements**: Specific services are required for installation. If the services are not running, this screen appears notifying you which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

  Professional Edition only: The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but

stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation. Windows 8 and Windows Server 2012 use Windows Search, and the Indexing Service is not available. The installer will prompt to start this service. Click **No, do not start the service** when prompted to allow the installation to continue. In this case, you must install the Windows Search service prior to installation.

- **Choose Destination Location**: You can accept the default target location, or click **Change** to specify a different one.

- **Usage Tracking Installation**: Select the **No, this is a new installation** option.

- **Choose Web Site**: The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory) name** box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

  Note: The web server and the database server must be in the same local network.

- **Web Site Options**: This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.

- **Database System**: Choose **Oracle Database**.

- **Oracle .NET Data Provider**: A specific version of the Oracle .NET Data Provider must be installed for the Developer to work correctly. This screen appears if the correct version is not present. In the **Path** field, enter the physical location to which you want to install the software. In the **Name** field, enter the name of the Oracle Home.

- **SQL Script Options**: If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.

- **Internet Information Services Option**: During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.

- **Oracle Database Login**: If the scripts have not been run, enter a valid system account name, password, and host string to connect to the Oracle Database server. This account must have permissions to create the schema and the tablespace. If the scripts have already been run to create the database, enter a user name, password and host string that has access to the user schema created to run the application. If the scripts have already been run, the Profile Credentials screen appears next.

  Note: Host String represents the name you assign for TNS connectivity in the tnsnames.ora file. This typically identifies the machine, port number and SID of the Oracle database. If you need to connect to a remote Oracle database you will need to supply the host:port/service_name; for example, "myservername:1521/orcl". In some environments a tnsname.ora might not be present. If you are not sure, it is highly recommended that you supply the host/service_name or host:port/service_name (if remote).

- **Choose Schema**: Specify a tablespace name, user name, and password and confirm the password. The user name is limited to 20 characters. The tablespace name is the

name of the tablespace that will be created or used during the installation; the user name is the user name that will be created or associated with the schema.

- **Content Root Information**: The content root name is the name of the virtual directory to be created for the content root. The content root location is the actual location (path and folder name) for the content root. You can also choose to use anonymous tracking, which means that all usage and tracking information is gathered under an anonymous name. Individual users scores and tracking data will not be available.

- **Application Pool User**: The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

  If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you create a new Windows account user, enter the user name and a password. If you use an existing account, specify the user name, including the domain, and the existing password for the account.

- **Profile Credentials**: If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password. You must also enter a first and last name for the profile. The Middle initial and E-mail address are optional.

- **Folder permission**: The Knowledge Center needs certain permissions to complete the installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a Content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the Content root as well. The user account needed is used by the Content root Application Pool in IIS.

  Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.

- **Installshield Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

To install the server with a Microsoft SQL Server database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the **Configuration** list, select **Knowledge Center**.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0. Note also that the HTTP Activation service must be installed on the server prior to installing on a Windows 2012 server.

- **Setup Requirements**: Specific services are required for installation. If the services are not running, this screen appears notifying you which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

  Professional Edition only: The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation. Windows 8 and Windows Server 2012 use Windows Search, and the Indexing Service is not available. The installer will prompt to start this service. Click **No, do not start the service** when prompted to allow the installation to continue. In this case, you must install the Windows Search service prior to installation.

- **Choose Destination Location**: You can accept the default target location, or click **Change** to specify a different one.

- **Usage Tracking Installation**: Select the **No, this is a new installation** option.

- **Choose Web Site**: The **Available websites** list contains the list of all web sites available to the user, allowing you to choose the most appropriate one. Preference is given to secure web sites. In the **Application (virtual directory)** name box, you can enter the name you want to use for the virtual directory, or accept the default. You also select the mode to use to authenticate the users, either Windows or Standard. Later, when you supply the credentials for the initial Profile, you must choose the same authentication mode.

  Note: The web server and the database server must be in the same local network.

- **Web Site Options**: This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.

- **Database System**: Choose **Microsoft SQL Server**.

- **SQL Script Options**: If you have already run the scripts to create the database, click the **Yes, the scripts have already been run for this version** option. If you want the installer to create the database, click the **No, the scripts have not been run, let the installer run them** option.

- **Internet Information Services Option**: During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.

- **Microsoft SQL Server Login**: From the **Database server** list, select the desired Microsoft SQL Server. If the scripts have not been run, select Windows Authentication or SQL Server Authentication to connect to the database. If you select Microsoft SQL Server authentication, enter an existing login name and password that has database administrator access to the server.

- **Choose Database**: Accept the default name for the database or enter a custom name. If you have already run the scripts, you must use the name of the database you created. Specify an existing database user ID and password and confirm the password, if necessary, or, if you have not run the scripts, you can also specify a new database user ID and password. The installer will create the login, if necessary, grant the login access to the database, and give it the appropriate permissions. If you ran the scripts to create the database, you must use the login you created.

- **Content Root Information**: The content root name is the name of the virtual directory to be created for the content root. The content root location is the actual location (path and folder name) for the content root. You can also choose to use anonymous tracking, which means that all usage and tracking information is gathered under an anonymous name. Individual users scores and tracking data will not be available.

- **Application Pool User**: The ContentTools folder within the content Root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

  If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you create a new Windows account user, enter the user name and a password. If you use an existing account, specify the user name, including the domain, and the existing password for the account.

- **Profile Credentials**: If you chose to install the server with standard authentication, enter a user name and password for the default administrator user, and confirm the password. If you chose to install with Microsoft Windows authentication, allow the system to use the current Microsoft Windows account or specify another valid Microsoft Windows user account and password.

- **Folder permission**: The Knowledge Center needs certain permissions to complete the installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

  Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is

highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the database and virtual directory are being created, and IIS is being configured.

- **Installshield Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

4.1.3 Install the Content Root (available only in the Professional Edition)

The content root is a folder on the server in which the content files are stored. A virtual directory is also created on the Web Server. A default content root is created as part of the Knowledge Center installation. Use this option if you want to create an additional content root.

Before you begin installation, be sure that you know the Oracle schema owner or Microsoft SQL Server database user credential information created when the Knowledge Center schema or database was installed.

To install the Content root with an Oracle database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the **Configuration** list, select **Knowledge Center Content Root**.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0.

- **Setup Requirements**: Specific services are required for installation. If the services are not running, this screen appears notifying you which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

Professional Edition only: The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation. On Windows 8 and Windows Server 2012, the Indexing Service is not available. The installer will prompt to start this service. Click **No, do not start the service** when prompted to allow the installation to continue.

- **Web Site Options**: This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web site manually and retry the installation.

- **Database System**: Choose **Oracle Database**.

- **Oracle .NET Data Provider**: A specific version of the Oracle .NET Data Provider must be installed for the Developer to work correctly. This screen appears if the correct version is not present. In the **Path** field, enter the physical location to which you want to install the software. In the **Name** field, enter the name of the Oracle Home.

- **Oracle Database Login**: Enter the user name, password and host string that has access to the user schema created to run the application.

- **Content Root Information**: The content root name is the name of the virtual directory to be created for the content root. The content root location is the actual location (path and folder name) for the content root. You can also choose to use anonymous tracking, which means that all usage and tracking information is gathered under an anonymous name. Individual users scores and tracking data will not be available.

- **Application Pool User**: The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

  If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you create a new Windows account user, enter the user name and a password. If you use an existing account, specify the user name, including the domain, and the existing password for the account.

- **Folder permission**: The Knowledge Center needs certain permissions to complete the installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

  Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without

applying any permissions. The permissions must be applied manually.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the schema and virtual directory are being created, and IIS is being configured.

- **Installshield Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

To install the Content root with a Microsoft SQL Server database, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the **Configuration** list, select **Knowledge Center Content Root**.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0.

- **Setup Requirements**: Specific services are required for installation. If the services are not running, this screen appears notifying you which services are needed. You can choose to start or enable the services and continue. Depending on the service, the installation may be aborted if it is not started.

  Note: The Indexing service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Indexing service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation. On Windows 8 and Windows Server 2012, the Indexing Service is not available. The installer will prompt to start this service. Click **No, do not start the service** when prompted to allow the installation to continue.

- **Web Site Options**: This screen appears if there is no secure web site available or if you did not select a secure web site on the Choose Web Site screen. It allows you to ignore the recommendation and continue with the installation, or create a secure web

site manually and retry the installation.

- **Database System**: Choose **Microsoft SQL Server**.

- **Select Microsoft SQL Server**: From the **Database server** list, select the desired Microsoft SQL Server.

- **Choose Database**: Enter the name of an existing database, and then enter the credentials used to access the database and for the database to communicate with the virtual directory.

- **Content Root Information**: The content root name is the name of the virtual directory to be created for the content root. The content root location is the actual location (path and folder name) for the content root. You can also choose to use anonymous tracking, which means that all usage and tracking information is gathered under an anonymous name. Individual users scores and tracking data will not be available.

- **Application Pool User**: The ContentTools folder within the content root performs all the processing activities for Knowledge Center content. It needs to copy files and folders, so it needs to be accessed by a user with the necessary privileges to perform these tasks. The virtual directory for the ContentTools needs to be assigned to an application pool that runs under the identity of this user.

  If the ContentTools application pool has already been created (usually by the Knowledge Center installation), the application pool identity will already be set. If not, a user account to be used as this application pool identity must be created or selected. If you create a new Windows account user, enter the user name and a password. If you use an existing account, specify the user name, including the domain, and the existing password for the account.

- **Folder permission**: The Knowledge Center needs certain permissions to complete the installation. If the installer detects any missing permission(s) it displays this screen, which lists the name of the folder, the user name, and the permission it needs before the installer can continue. If you are installing a content root to the same server as the Knowledge Center, the permission must be applied to the specific folders for the content root as well. The user account needed is used by the content root application pool in IIS.

  Click **Yes, grant permission to the folders** to automatically grant the permissions to the folders. If the permissions cannot be applied, this screen reappears. This option is highly recommended. Click **No, ignore permission and attempt to continue installation** to ignore the permission check and try to continue the installation. If the permissions are not set properly, the installation may fail. Use this option if you know that the permissions are already applied. Click **Retry** to recheck the folders without applying any permissions. The permissions must be applied manually.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the tablespace and virtual directory are being created, and IIS is being configured.

- **Installshield Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

4.1.4 Install the Knowledge Center User Import Utility

The User Import Utility enables you to easily import user names and password information from a file or database into the Knowledge Center. It is a separate program that resides locally and connects to the server.

There are two things your administrator should supply to you before you install the Knowledge Center User Import Utility on your local workstation:

- The name of the web server and virtual directory where Knowledge Center is located. Please note that the Knowledge Center must be installed before you can use the User Import Utility.

- Your user credentials - either your Windows login account, or a user name and password that your administrator has created.

To install the Knowledge Center User Import Utility, launch the Setup.exe file located in the root folder in the software installation files. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **License Key**: Depending on the product you are installing, this screen may appear. If it does, click **Browse** to navigate to the location of the license key file (usually license.xml).

- **Welcome**: From this screen, you can access the Installation and Upgrade manuals in Adobe Acrobat format.

- **Setup Type**: From the **Configuration** list, select **Knowledge Center User Import Utility**.

- **Software Requirements**: Third-party applications are required for installation. If the applications are not present, this screen appears notifying you which applications are needed. You can choose not to continue and abort the installation. If you choose to continue, the applications are installed. If one of them is the .NET framework, the .NET Installer may prompt you to close the Installer. Ignore this warning and do not shut down the Installer.

  Note: On Windows 8 and Windows Server 2012, Microsoft .NET Framework 4.0 will not be properly detected and this dialog may appear prompting to install Microsoft .NET Framework 4.0 when Microsoft .NET Framework 4.5 is already installed. If prompted, select the options to allow the installer to install Microsoft .NET Framework 4.0, and the installer will proceed through the rest of the installation flow without installing Microsoft .NET Framework 4.0.

- **Select Program Folder**: You can indicate the desired program folder or accept the default.

- **Choose Destination Location**: You can accept the default target location, or click **Change** to specify a different one.

- **Ready to Install**: The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed.

- **Installshield Wizard Complete**: During the installation a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

4.1.5 Install for Load Balancing

When setting up an environment using load balancing technology, the configuration must be the same on each server used in the environment. When load balancing the Knowledge Center database, an exact replica must be maintained or synchronized across databases. In the setup example below, it is assumed that you are using multiple Knowledge Center servers and one Knowledge Center database.

Note: When using Windows authentication, each server must be able to get authentication for the Windows users. That is, all servers should be able to get authentication for all Windows accounts rather than each knowing a subset of users. This is most likely to work when the servers are all within the same Windows domain.

To install Knowledge Center servers for a load-balanced environment:

1. Install Knowledge Center to the first server as desired. Make a note of your chosen Application (virtual directory) names, Authentication mode and Database configuration.

2. The installation does not create Content Root folders for the subsequent servers because the content folder already exists on the original server; therefore, the Content Root folder created in the original installation must be replicated to each of the subsequent servers. The folders and virtual directories must be identical to that of the original server. This can either be done manually or through a replication service. Note that this is the content location and content will be continually imported to this location through the software. The ContentToolsAppPool4 application pool that is created for the Content Root on the original server should be run under the identity of a user account that will also have access to the replicated Content Root folders.

3. Run the installer for all subsequent Knowledge Center servers, using the information below for the screens indicated:

   Choose Web Site: All applications and authentication mode must the same as the first server noted in step 1.

   Database System: Select the database option used in the first server noted in step 1.

   SQL Script Options: Click the **Yes, the scripts have already been run for this version** option.

   Internet Information Services Option: Click the **Yes, continue with the installation** option.

   Oracle Database Login or **Microsoft SQL Server Login**: Enter the database information used in the first server noted in step 1.

   Schema Options or **Database Options**: Choose the **Use existing schema** or **Use existing database option**.

   Add Content Root: Choose **No, additional content root is not needed at this time**.

The web.config files within KCenter, KData, and KContent need to be modified for all servers:

Open the web.config file located in the Web Server\KCenter folder on the original install. Find the machineKey item in the config file (configuration -> system.web -> machineKey). Either copy this section to the clipboard or to a file. This section needs to be replicated to each of the subsequent servers.

Edit the web.config files for KCenter, KData, and KContent on each of the subsequent servers and replace the machineKey section with the machine key section of the original server.

If a secure website (SSL) is used, the Knowledge Center and Content Root applications will all be registered using the load-balanced URL, as long as the server certificate was issued to the load-balanced URL. If SSL is not being used, the Knowledge Center and Content Root URLs should be updated using Manager to match the load-balanced URL.

4.1.6 Configure Knowledge Center for SSO

Knowledge Center supports HTTP header based Single Sign-On (SSO). The HTTP Headers would contain basic user information that Knowledge Center uses to authorized and maintain basic user information. One supported platform is Oracle Access Manager; however, you must use the Oracle Access Webgate for IIS in this case.

The installation of Knowledge Center is the same as Standard Authentication. The Administrator user defined in the installation must match the SSO username that will be managing Knowledge Center.

- Install Knowledge Center as Standard Authentication: The Admin User must be an SSO User.

- Edit the web.config file located in the Knowledge Center\Web Server\KCenter\ path. Change the configuration -> appSettings -> UserHeaderLogin to true. Add configuration -> appSettings -> SSOLogoutUrl that contains the logout URL.

- Edit the CustomHeaders.xml file located in the Knowledge Center\Web Server\KCenter\bin\ path. This XML file is used to map the HTTP Headers to the Knowledge Center User information. Modify the headerName attribute to match the HTTP Header name that is sent from the SSO Provider that corresponds to the Knowledge Center field name. Custom User fields may also be added to the xml file allowing additional user data to be saved for Knowledge Center users. This will allow additional user information to be stored in Knowledge Center that can be used in reports. This is mapped the same way where the headerName is the HTTP Header from the SSO Provider and the fieldName is the Custom User field Name defined in the Custom User Field Properties in Knowledge Center. The isCustom attribute must be set to "true" for custom user fields. Below is a sample of the xml containing the standard Knowledge Center fields and one custom user field named REGION.

```
<?xml version="1.0"?>
<headers>
<items>
  <item headerName="HTTP_USERNAME" fieldName="USERNAME"
isCustom="false"/>
  <item headerName="HTTP_FIRSTNAME" fieldName="FIRSTNAME"
isCustom="false"/>
  <item headerName="HTTP_LASTNAME" fieldName="LASTNAME"
isCustom="false"/>
  <item headerName="HTTP_EMAIL" fieldName="EMAIL" isCustom="false"/>
  <item headerName="HTTP_REGION" fieldName="REGION" isCustom="true"/>
</items>
</headers>
```

- Configure the SSO Policies on the SSO Server to authenticate and authorize the following virtual directories.

  KCenter - SSO Authenticate and authorize
  KContent - SSO Authenticate and authorize
  KContent/ContentTools - anonymous
  KData - anonymous

5 Service Pack Installation

An Enablement Service Pack is used to improve your efficiency in developing, publishing and deploying content for your audience. The service packs may contain new features, updated capabilities and fixes to problems.

The service pack installer will determine the configuration to update based on the location you specify. If you are planning to update both the Developer and Knowledge Center, you will have to run the installer twice. If you have multiple instances of both the Developer and Knowledge Center installed, the default path will be the last installed instance of either the Developer or Knowledge Center. You must run the service pack installer multiple times to update each instance.

The recommended order to apply a service pack to the Developer is as follows:

1. Apply the service pack to the Developer Server.
2. Apply the service pack to one Developer Client.
3. Launch the Developer Client to update the library.
4. Apply the service pack to all other Developer Clients.

The recommended order to apply a service pack to Knowledge Center is as follows:

1. Apply the service pack to the Knowledge Center Server.
2. Apply the service pack to the Knowledge Center User Import Utility.

Note: Typical releases include bug fixes and enhancements that may result in changes to various publishing styles in the Developer. When you apply a service pack, you can upgrade any custom document publishing styles you have created in the Library. The capability to upgrade a publishing style only applies to document outputs (System Process, Training Guide, Instructor Manual, Test Document, Test Case, Job Aid, and Presentation). If a publishing style is not upgraded, it will not be available for publishing. You are therefore advised to reapply any customizations to the appropriate default publishing style or styles that are not or cannot be automatically upgraded after applying the service pack.

5.1 Considerations for Service Pack 2

In Service Pack 2, support was added for Windows 8, Windows Server 2012, and Internet Explorer 10; however, there are some items to consider before installing and using the Developer or Knowledge Center on these platforms.

Windows 8

There are two forms of Windows 8, Windows 8 and Windows 8 RT, which is designed to run on ARM-based devices. The Developer and Knowledge Center are only certified on Intel-based platforms and not on ARM-based devices. Windows 8 also introduced a touch interface, primarily used in the Modern interfaces for Windows 8 tablet devices. The Developer and Knowledge Center will run in both the Modern and Desktop interfaces, but it is not certified with touch interfaces.

When you install the Service Pack on Windows 8, you are prompted to install the .NET 4.0 Framework. Choose to install it, and the installer will detect that a newer .NET 4.5 Framework is present by default and will not install .NET 4.0.

Windows Server 2012

Windows Server 2012 is only fully supported in with Service Pack 2. You must first install 11.1 and then install Service Pack 2. Running version 11.1 prior to installing the Service Pack may result in unexpected behaviors. The HTTP activation service must be installed **prior** to installing on Windows 2012.

When you install the Service Pack on Windows Server 2012, you are prompted to install the .NET 4.0 Framework. Choose to install it, and the installer will detect that a newer .NET 4.5 Framework is present by default and will not install .NET 4.0.

If you are installing Knowledge Center, note that it uses the Windows Indexing service for its search. This service has been replaced with Windows Search service in Windows Server 2012. The Windows Search service must be installed on the server prior to installing Knowledge Center. The installer then configures the service properly during installation. Windows Search requires the use of a machine name or fully qualified domain name rather than an IP address. The installer uses the machine name by default, but if you have manually configured an IP address, you need to change it back to the machine name.

Internet Explorer 10

There are two different versions of Internet Explorer 10 in Windows 8, Classic and Modern. Unless specifically noted, features are fully certified in Classic Internet Explorer 10. Support for Modern Internet Explorer 10 is constrained largely to those features that play in the browser:

- Developer and Recorder: Classic version (desktop interface) only.
- Player and Knowledge Center browser interfaces: Both Classic and Modern versions.
- Do It! and Test It! modes: The Modern version does not support browser windows of different sizes or overlapping windows; therefore, Do It! and Test It! modes always occupy the entire browser area. In Modern version, Do It! does not stay on top of an application.
- Knowledge Center User Import Utility: Classic version (desktop interface) only.
- Playback of AICC Compliant LMS content: Requires Java, which is only available in the Classic version (desktop interface).
- Sound in the Player: Classic version (desktop interface) only. It uses Flash for sound, and Flash is only supported in Modern version for web sites registered and approved by Microsoft. In the updates for March 2013, Microsoft has removed this limitation, and Flash is supported for most sites in Modern version with the March 2013 update. Sound plays in the Player with the March update.
- SmartHelp: Classic version (desktop interface) only. There is no plugin support in Modern version. SmartHelp does not work with Enhanced Protected Mode setting. In addition, SmartHelp cannot be installed using the smarthelpsetup.html page while Enhanced Protected Mode is active or using the Modern version. It can be installed using smarthelpsetup.html for Classic version on the desktop, but it does not work on pages where Protected Mode is on and Enhanced Protected Mode is active.

Recording in Windows 8 and Internet Explorer 10

- When active, the new Enhanced Protected Mode security setting prevents the Recorder from capturing screenshots.
- If you want to record the Charm Bar, use automatic recording, as the Charm Bar closes when you press PrintScreen during manual recording.
- You cannot record the Modern touch interface and Internet Explorer 10 Modern version at this time.

5.2 Apply the Service Pack to the Developer Server

The service pack installer may contain updates for both the web server and the database. If a database update exists, then you have the option to either have the service pack installer

apply the database update or run the scripts manually. If you use the installer, it will populate the appropriate prompts when available, with the only exception being the prompt for the system administrator password to access the Oracle database. It is necessary for the user to have access to this password prior to running the installer.

Upon updating the Developer Server, you will need to apply updates to the Developer Library and apply the service pack to the Developer Clients.

To install a service pack, exit the Developer and the Knowledge Center and launch the self-extracting executable file. This file automatically extracts the files and launches the installer. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **Welcome**: The Welcome screen identifies the name of the service pack. You can click **Cancel** if you decide that you do not want to install the service pack.

- **Application Selection**: Choose **Developer**.

- **Choose Destination Location**: Displays the default location where the application is currently installed. Confirm that this location is correct or change the location to where the application is currently installed.

- **SQL Script Options**: This screen only appears if there is an update necessary for the database and the scripts have not been run manually. If the database needs to be updated, click the **No, the scripts have not been run, let the installer run them** option. If no database update is necessary, the Internet Information Services Option screen appears if there is an update for the web server. If there is no update for the database or the web server, the Ready to Install screen appears.

- **Internet Information Services Option**: This screen only appears if there is an update for the web server files. During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.

- **Oracle Database Login**: If the scripts have not been run, the connection credentials appear on this screen. You do not need to change them, but you must supply the system administrator password. If the scripts have already been run or there is no database update, this screen does not appear and the Ready to Install screen appears next.

  or

  Microsoft SQL Server Login: If the scripts have not been run, the connection credentials appear on this screen. You do not need to change them, but you can if you feel it is necessary. If you do change them, enter an existing login name and password that has database administrator access to the server. If the scripts have already been run or there is no database update, this screen does not appear and the Ready to Install screen appears next.

- **Choose Schema**: The tablespace name, user name, and password are defaulted.

  or

  Choose Database: The database name, login ID and password are defaulted.

- **Ready to Install**: The Installation Wizard is ready to update the application. Click Back to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the database is being updated, and IIS is being configured.

- **Installshield Wizard Complete**: During the update a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

5.3 Apply Service Pack Database Updates Manually to the Developer Server

If the service pack installer contains a database update, you can run the scripts manually. Consult the ReadMe to determine if there is a database update. After you update the database, you should then run the installer to update the web server and the Library.

The installer files for the Enablement Service Pack are compiled into a self-extracting executable file. To run the scripts manually, you must extract the installer files.

To extract the installer files:

1. Create an empty folder for the files.

   Tip: It is easier if the folder is in the same location as the self-extracting executable.

2. From the Windows Start menu, open a Command Prompt window.

3. To extract the files into the newly created directory, enter the following at the command prompt: /extract_all:<extraction location>. Be sure to include the path to the folder in the command.

   Example: C:\ESPInstaller\UPK_11.1.0.2.exe /extract_all:C:\ESPInstaller\ExtractedFiles.

To update the Developer database manually on an Oracle server:

1. From the Windows Start menu, open a Command Prompt window.

2. To update the schema using the **AlterSchemaObjects.sql** script located in **\patchfiles\content\database** in the software installation files, enter the following at the command prompt:

   sqlplus - SQL*Plus is the command line application for Oracle Database.

   -s - Run SQL*Plus without SQL*Plus messaging.

   <adminuser> - The administrative user for the instance of the Oracle server.

   <adminpwd>@<instance> - The password for the administrative user and the name of the instance.

   <scriptlocation>\<scriptname> - The path to the location of the script and the name of the script to be run.

   schema_owner - The schema owner name is limited to 20 characters.

   password - The password used for the schema owner account and the schema_app account.

   Statement with generic parameters:
   sqlplus -s <adminuser>/<adminpwd>@<instance> @"<script location>\<script

name>" schema_owner password

Example with default install parameters:
sqlplus -s system/password@xe
@"E:\Setup\patchfiles\content\database\AlterSchemaObjects.sql" ODServer password

3. Confirm the parameters and run the script.

To update the Developer database manually on a Microsoft SQL Server:

1. From the Windows Start menu, open a Command Prompt window.
2. To update the database using the **AlterDBObjects.sql** script located in **\patchfiles\content\database** in the software installation files, enter the following at the command prompt:

   sqlcmd - The command line application for the Microsoft SQL Server.

   -E - Use a trusted connection to the Microsoft SQL Server. To use a login and password, use the -U <LOGINID> -P <password> parameters.

   -S <servername> - The name of the Microsoft SQL Server.

   -i "<scriptfile>" - The path to the script file and the name of the script file.

   -v DBOwner="<owner name>" - The database account that owns the database.

   -v DBName="<database name>" - The name of the database to be upgraded.

   Statement with generic parameters:
   sqlcmd -E -S <servername> -i <scriptfile> –v DBOwner="<VALUE1>" -v DBName="<VALUE2>"

   Example with default install parameters:
   sqlcmd -E -S "mysqlserver" -i "E:\Setup\patchfiles\content\database\AlterDBObjects.sql" -v DBOwner="ODServer" -v DBName="ODDevContent"

3. Confirm the parameters and run the script.
4. Close the Command Prompt window.

5.4 Apply the Service Pack to the Developer Client

After the service pack is installed, updates must to be applied to the library. The first client to log into the server after the service pack is installed to the client will be prompted to apply the library updates. Remaining clients should have the patch applied, but it is not necessary to launch each subsequent client to apply the library updates (the library will already be updated).

To install the service pack to the client, exit the Developer and launch the self-extracting executable file. This file automatically extracts the files and launches the installer. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **Welcome**: The Welcome screen identifies the name of the service pack. You can click **Cancel** if you decide that you do not want to install the service pack.
- **Application Selection**: Choose **Developer**.

- **Choose Destination Location**: Displays the default location where the application is currently installed. Confirm that this location is correct or change the location to where the application is currently installed.

- **Ready to Install**: The Installation Wizard is ready to update the application. Click Back to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed.

- **Installshield Wizard Complete**: During the update a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

If you are the first client to be installed, continue with the steps below to apply the updates to the library. Otherwise, stop here.

To apply the updates to the library:

1. Launch the Developer client.

2. The Developer automatically detects that the library update is available. Click **OK** to run the update.

3. When the update is complete, the Library Update Complete message appears. You can click the **View activity log** link to see detailed results of the update. Click **Close** when you are finished. Click **OK** to close the message.

To verify that the service pack has been installed on the client without launching Developer:

1. Navigate to the folder where the client is installed.

2. Open the BinaryUpdates folder.

3. The folder contains empty text files with the same name as any installed service packs. The text files are not created until the service pack is actually installed, so if one does not exist for a specific service pack, it has not been applied on the client.

5.5 Apply the Service Pack to a Single User Developer Installation

After the service pack is installed, updates may still need to be applied to the library. These updates are applied to your local cache the first time you connect to the updated library.

To install the service pack, exit the Developer and launch the self-extracting executable file. This file automatically extracts the files and launches the installer. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **Welcome**: The Welcome screen identifies the name of the service pack. You can click **Cancel** if you decide that you do not want to install the service pack.

- **Application Selection**: Choose **Developer**.

- **Choose Destination Location**: Displays the default location where the application is currently installed. Confirm that this location is correct or change the location to where

the application is currently installed.

- **Ready to Install**: The Installation Wizard is ready to update the application. Click Back to review or modify any settings.
- **Setup Status**: This screen appears while the files are being installed.
- **Installshield Wizard Complete**: During the update a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

When you log in to the Developer, continue with the steps below to apply the updates to the library.

To apply the updates to the library:

1. Launch the Developer.
2. The Developer automatically detects that the library update is available. Click **OK** to run the update.
3. When the update is complete, the Library Update Complete message appears. You can click the **View activity log** link to see detailed results of the update. Click **Close** when you are finished. Click **OK** to close the message.

To verify that the service pack has been installed without launching Developer:

1. Navigate to the folder where the Developer is installed.
2. Open the BinaryUpdates folder.
3. The folder contains empty text files with the same name as any installed service packs. The text files are not created until the service pack is actually installed, so if one does not exist for a specific service pack, it has not been applied.

5.6 Apply the Service Pack to the Knowledge Center Server

The service pack installer may contain updates for both the web server and the database. If a database update exists, then you have the option to either have the service pack installer apply the database update or run the scripts manually. If you use the installer, it will populate the appropriate prompts when available, with the only exception being the prompt for the system administrator password to access the Oracle database. It is necessary for the user to have access to this password prior to running the installer.

Note that the service pack installer also updates content roots as well as the User Import Utility, if it is installed in the same location as the server. If the User Import Utility is installed in a different folder than the server, you can also update it separately; see *Apply the Service Pack to the Knowledge Center User Import Utility* for more information.

Note: If you add a content root after applying the service pack, or if the content root was otherwise not available when the service pack was applied, you must update that content root separately. See *Apply the Service Pack to the Knowledge Center Content Root* for more information.

To install a service pack, exit the Developer and the Knowledge Center and launch the self-extracting executable file. This file automatically extracts the files and launches the installer. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **Welcome**: The Welcome screen identifies the name of the service pack. You can click **Cancel** if you decide that you do not want to install the service pack.

- **Application Selection**: Choose **Knowledge Center**.

- **Choose Destination Location**: Displays the default location where the application is currently installed. Confirm that this location is correct or change the location to where the application is currently installed. Knowledge Center Server files and the Knowledge Center User Import Utility can share the same root directory. If the directory selected contains both the Knowledge Center Server and User Import Utility, the ESP installer will update both applications. Select the root location for Knowledge Center, not the "Web Server" or "Tools" specific folder. The installer will detect which product configuration to update based on the installation location.

- **Setup Requirements**: This screen appears if you are installing the Service Pack for the Professional Edition on Windows Server 2012. The Windows Search service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Search service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

  Note: For Windows Search to work properly, the UNC Path property of the Content Root cannot use the IP address as the UNC Path. It should use the machine name.

- **SQL Script Options**: This screen only appears if there is an update necessary for the database and the scripts have not been run manually. If the database needs to be updated, click the **No, the scripts have not been run, let the installer run them** option. If no database update is necessary, the Internet Information Services Option screen appears if there is an update for the web server. If there is no update for the database or the web server, the Ready to Install screen appears.

- **Internet Information Services Option**: This screen only appears if there is an update for the web server files. During installation, the Internet Information Services will need to be stopped and restarted. You can choose to continue with the installation or cancel it and install at a later time.

- **Oracle Database Login**: If the scripts have not been run, the connection credentials appear on this screen. You do not need to change them, but you must supply the system administrator password. If the scripts have already been run or there is no database update, this screen does not appear and the Ready to Install screen appears next.

  or

  Microsoft SQL Server Login: If the scripts have not been run, the connection credentials appear on this screen. You do not need to change them, but you can if you feel it is necessary. If you do change them, enter an existing login name and password that has database administrator access to the server. If the scripts have already been run or there is no database update, this screen does not appear and the Ready to Install screen appears next.

- **Choose Schema**: The tablespace name, user name, and password are defaulted.

  or

  Choose Database: The database name, login ID and password are defaulted.

- **Ready to Install**: The Installation Wizard is ready to update the application. Click Back to review or modify any settings.

- **Setup Status**: This screen appears while the files are being installed, the database is being updated, and IIS is being configured.

- **Installshield Wizard Complete**: During the update a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

5.7 Apply the Service Pack Database Updates Manually to the Knowledge Center Server

If the service pack installer contains a database update, you can run the scripts manually. Consult the ReadMe to determine if there is a database update. After you update the database, you should then run the installer to update the web server and the library.

The installer files for the Enablement Service Pack are compiled into a self-extracting executable file. To run the scripts manually, you must extract the installer files.

To extract the installer files:

1. Create an empty folder for the files.

   Tip: It is easier if the folder is in the same location as the self-extracting executable.

2. From the Windows Start menu, open a Command Prompt window.

3. To extract the files into the newly created directory, enter the following at the command prompt: /extract_all:<extraction location>. Be sure to include the path to the folder in the command.

   Example: C:\ESPInstaller\UPK_11.1.0.2.exe /extract_all:C:\ESPInstaller\ExtractedFiles.

To update the Knowledge Center database manually on an Oracle server:

1. From the Windows Start menu, open a Command Prompt window.

2. To update the schema using the **AlterSchemaObjects.sql** script located in **\patchfiles\Content\Database\KCenter\Resources\OracleScripts** in the software installation files, enter the following at the command prompt:

   sqlplus - SQL*Plus is the command line application for Oracle Database.

   -s - Run SQL*Plus without SQL*Plus messaging.

   <adminuser> - The administrative user for the instance of the Oracle server.

   <adminpwd>@<instance> - The password for the administrative user and the name of the instance.

   <scriptlocation>\<scriptname> - The path to the location of the script and the name of the script to be run.

   schema_owner - The schema owner name is limited to 20 characters.

   password - The password used for the schema owner account and the schema_app account.

Statement with generic parameters:
sqlplus -s <adminuser>/<adminpwd>@<instance> @"<script location>\<script name>" schema_owner password

Example with default install parameters:
sqlplus -s system/password@xe @"E:\Setup\patchfiles\Content\Database\KCenter\Resources\OracleScripts\AlterSchemaObjects.sql" KUSER KUSER KMASTER KMASTER_TEMP

3. Confirm the parameters and run the script.

To update the Developer database manually on a Microsoft SQL Server:

1. From the Windows Start menu, open a Command Prompt window.
2. To update the database using the **AlterDBObjects.sql** script located in **\patchfiles\Content\Database\KCenter\Resources\SQLServerScripts** in the software installation files, enter the following at the command prompt:

   sqlcmd - The command line application for the Microsoft SQL Server.

   -E - Use a trusted connection to the Microsoft SQL Server. To use a login and password, use the -U <LOGINID> -P <password> parameters.

   -S <servername> - The name of the Microsoft SQL Server.

   -i "<scriptfile>" - The path to the script file and the name of the script file.

   -v DBOwner="<owner name>" - The database account that owns the database.

   -v DBName="<database name>" - The name of the database to be upgraded.

   Statement with generic parameters:
   sqlcmd -E -S <servername> -i <scriptfile> –v DBOwner="<VALUE1>" -v DBName="<VALUE2>"

   Example with default install parameters:
   sqlcmd -E -S "mysqlserver" -i "E:\Setup\patchfiles\Content\Database\KCenter\Resources\SQLServerScripts\AlterDBObjects.sql" -v DBOwner="KUser" -v DBName="KMASTER"

3. Confirm the parameters and run the script.
4. Close the Command Prompt window.

5.8 Apply the Service Pack to the Knowledge Center User Import Utility

If the Knowledge Center User Import Utility and the Knowledge Center server share the same root directory, the service pack installer will update both applications. You only need to follow the steps below if the User Import Utility is installed in a different location.

To install a service pack, launch the self-extracting executable file. This file automatically extracts the files and launches the installer. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **Welcome**: The Welcome screen identifies the name of the service pack. You can click **Cancel** if you decide that you do not want to install the service pack.

- **Application Selection**: Choose **Knowledge Center**.

- **Choose Destination Location**: Displays the default location where the application is currently installed. Confirm that this location is correct or change the location to where the application is currently installed. Knowledge Center Server files and the Knowledge Center User Import Utility can share the same root directory. If the directory selected contains both the Knowledge Center Server and User Import Utility, the installer will update both applications. Select the root location for Knowledge Center, not the "Web Server" or "Tools" specific folder. The installer will detect which product configuration to update based on the installation location.

- **Ready to Install**: The Installation Wizard is ready to update the application. Click Back to review or modify any settings.

- **Setup Status**: This screen appears while the files are being copied.

- **Installshield Wizard Complete**: During the update a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

5.9 Apply the Service Pack to the Knowledge Center Content Root

You may need to update a content root if it was not available when the service pack was applied, or if it was added after the update.

To install a service pack and apply it to a content root, launch the self-extracting executable file. This file automatically extracts the files and launches the installer. If a Security Warning appears, click Run. You are then prompted to choose the language for the Installer, and the Install Wizard appears. During installation, you will proceed through these screens in the Install Wizard.

- **Welcome**: The Welcome screen identifies the name of the service pack. You can click **Cancel** if you decide that you do not want to install the service pack.

- **Application Selection**: Choose **Knowledge Center**.

- **Choose Destination Location**: Displays the default location where the application is currently installed. The content root is typically in a different location than the server; select the location where the content root is installed.

- **Setup Requirements**: This screen appears if you are installing the Service Pack for the Professional Edition on Windows Server 2012. The Windows Search service is optional for the Professional Edition of Knowledge Center; however, if it is not installed and started, the Search functionality will not function properly. During the installation of Professional Edition, the installer will detect the state of the Search service. If the service is installed but stopped, the installer presents you with the option to start it. If the service is not installed or disabled, and you want Search to function properly, you must manually install or enable the service before proceeding with the installation.

  Note: For Windows Search to work properly, the UNC Path property of the Content Root cannot use the IP address as the UNC Path. It should use the machine name.

- **Ready to Install**: The Installation Wizard is ready to update the application. Click Back to review or modify any settings.

- **Setup Status**: This screen appears while the files are being copied.

- **Installshield Wizard Complete**: During the update a file might be in use by the operating system on the computer; this will require a reboot to complete the installation. Also, make sure to run Windows update to get the latest patches from Microsoft.

6 Unattended Installation

You can use Push technology to distribute executable files for the setup to user desktops. You record response files which contain the pre-determined default settings, and then you can run the executable silently. If you deploy executable files in this manner, no interaction is necessary on the part of the user. The administrator can control the installation.

You can record response files for any of the setup executables.

6.1 Record the Parameter File

To create a parameter file, you use the /r parameter to run the setup executable in record mode. This generates a response file (.iss) that contains the settings you chose while recording. These become the default settings.

The setup.iss file is stored automatically in the Windows folder. You can use the /f1 option to specify a different location in which to create the response file. If the path names contain spaces, you must use quotes. The path names should also be absolute, as relative paths may have unexpected results.

Example: "<location of the setup file>\setup.exe" /r /f1"<location of the response file>\setup.iss"

Sample: "x:\my folder\setup.exe" /r /f1"x:\setup.iss"

When you are creating the response file, you must use a computer with the same operating system as the computers on which the setup will be deployed. For example, if your users have computers with Microsoft Windows XP, you must record the steps on a computer with Microsoft Windows XP.

If you need to specify a license key file while you are recording the steps, be aware that it must be in that same location when the setup is being run on the user machines. This can be a common mapped drive on the network, or it can be pushed with the setup.exe to a specified location on the local computer. For example, while you are recording the response, you browse to c:\mylicensekey to locate the license key. When the setup is run silently, the license key must then be in a folder called c:\mylicensekey on the computer where the setup is being run.

6.2 Run the Executable Silently

Once you have recorded a parameter file, you can use the /s parameter to run the setup silently. By default, the installation process will look for the response file (.iss) in the same directory as the setup.exe. You use the /f1 parameter to specify a different location of the .iss file.

The response file (.iss) must be either be pushed out with the setup.exe file or reside in a location that is accessible to all computers and uses the same drive mapping as is stored in the response file.

To run the setup silently, use a command line as shown below. If the path names contain spaces, you must use quotes. The path names should also be absolute, as relative paths may have unexpected results.

Example: "<location of the setup file>\setup.exe" /s /f1"<location of the response file>\setup.iss"

Sample: "x:\my folder\setup.exe" /s /f1"x:\setup.iss"

While the setup file is running, there is no indication in the task bar. To verify that the setup process is still running, open Task Manager and view the Processes tab. Setup.exe should appear in the list.

Silent Installation and Languages

If you record a parameter file in one language and then use it to install on an operating system using a different language, you will need to supply a language code for the installation to work properly. The language codes are:

1031 - German
1033 - English
1034 - Spanish
1036 - French
1041 - Japanese
1043 - Dutch

The command line syntax with the language code is below. The example uses the language code for German.

Example: "<location of the setup file>\setup.exe" -1<language code> /s /f1"<location of the response file>\setup.iss"

Sample: "x:\my folder\setup.exe" -11031 /s /f1"x:\setup.iss"

If you record a parameter file in one language and install it on an operating system using the same language, you do not need to specify a language code.

7 Author and Content Administration in the Developer

In a multi-user installation of the Developer, any administrator user can perform the following operations to manage authors and administer various aspects of the content in the Library:

- Add, Edit, and Delete Authors
- Manage Library Permissions
- Define Content State Values
- Override Document Checkout by other Authors

Note: You must work online to perform any author management operations.

The Administration menu appears only for authors who are configured as administrators.

7.1 Manage Authors

After the installation of the Server is complete, you should install the Client (Developer) on at least one computer and create a Login Profile that connects to the server.

Tip: During the Server installation, you can also choose to install a Client shortcut on the server that you can use to start the Developer. Then you can access the Administration menu to add additional authors and perform other administrative operations.

When the Server component is installed, the person performing the installation must choose to configure the Library using Windows or Standard authentication. Depending on the authentication method selected, a default author is automatically added into the Library. This allows one author to install the Client (Developer) on a local computer, create a Login Profile that connects to the Library, and add additional authors. The authentication method determines how the default author is created. For example, if Windows authentication was selected during the installation, the Windows login of the person installing the software is automatically added as the default author with administrative privileges. If Standard authentication was selected during the installation, a default author of admin is automatically added with administrative privileges. The password for the admin author is admin. You should use this author name and password to create a Login Profile and log into the Developer for the first time. It is also highly recommended that you immediately change the password for the admin author.

Regardless of whether you are using Standard or Windows authentication (as defined when the Server component is installed), you must identify each author that will access the Developer before any author can create a Login Profile and log in to the Library.

If the server is configured for Windows authentication, you will need to know the Windows login (user name) for each person that will access the Developer; however, you will not need to know their password. The user's Windows password is used to authenticate the user login.

If the server is configured for Standard authentication, you will define each author's user name and password and then distribute this information to each author so they can create a Login Profile using the same login credentials. It is highly recommended that each author change their password.

As the administrator you can add, edit, or delete authors, assign an author Administrator privileges, as well as manage Library permissions for an author or groups of authors.

Note about Permissions: Any new author that you add has complete access to all folders in the Library, unless you explicitly configure additional security permissions.

7.1.1 Add Author

Each author must have a unique name defined before they can log in to a Library. The Developer uses this name to keep track of document modifications. For example, the Library and Outline Editor display the name of the user that has currently checked out a document.

You can also configure group membership and Library folder permissions for each author.

Note: The author name is also use to populate the list of names that appear for the Owner property in the Developer. This property allows an author to identify current document ownership or responsibility.

After you add authors, you will need to provide them following information so they can create a Login Profile and connect to the Library:

- Library location URL (for example, http://server/virtual directory)
- Login credentials such as author name and password (Standard Authentication only)

To add an author using Windows Authentication:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.
4. Click **Add new author**.
5. Enter the exact Windows Login for an author in the Author Name field. You must include a domain/machine name as a prefix to the author name separated by a backslash \. For example, enter My_domain name\My_name.
6. Optionally, you can assign an author to a group and/or configure Library folder permissions using the Groups and Permissions tabs.

To add an author using Standard Authentication:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.
4. Click **Add new author**.
5. Enter a unique author name for the author. Duplicate author names are not allowed.
6. Enter a password and confirm it.

   Blank passwords are acceptable. Author names are not case-sensitive.
7. Optionally, you can assign an author to a group and/or configure Library folder permissions using the Groups and Permissions tabs.

7.1.2 Assign Author as Administrator

If you want an author to have administrator privileges, you must assign the author to the Administrators group. The Administration menu will appear in the Developer the next time the

author logs in to the Developer. At least one author must be a member of the Administrators group. This group cannot be deleted.

To assign an author as an Administrator:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.
4. Click **Add new author** or click **Edit selected author**.
5. Click the **Groups** tab.
6. Mark the **Administrators** checkbox.
7. Click **OK**.

7.1.3 Edit Author

You can edit any author and change their name and/or password (the password can be changed in Standard Authentication only. Administrators cannot change the Windows account password under Windows Authentication.)

You can also edit group membership and Library folder permissions for each author.

For Standard Authentication only, editing the name will update the document history for all documents that the author has checked in to the server (on server synchronization). Also note the following:

If you change or delete another author's name, you (administrator) will receive a warning message about the following consequences that will take place if the operation continues:

- The checkout of any document by the author is overridden and any changes that were made by the author are lost.
- Any new document created by the author that was not checked in will be lost (the author cannot check their new documents in with the new or deleted author name).
- If the author is logged in to the Developer at the time the name was changed or deleted, the author will be automatically logged out and left disconnected in the Developer. The author will also need to create a new Login Profile with their new credentials if their name was deleted.

Notes about Windows Authentication

If you are using Windows authentication and an author's Windows login account changes, the administrator must manually update the author name to match the new Windows log on account.

To edit an author using Windows Authentication:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.

4. Select the author that you want to edit and click **Edit selected author**.
5. Enter the exact Windows Login for an author in the Author Name field.
6. Optionally, you can assign an author to a group and/or configure Library folder permissions using the Groups and Permissions tabs.

To edit an author using Standard Authentication:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.
4. Select the author that you want to edit and click **Edit selected author**.
5. Edit the author name.
6. Edit the password and confirm it.
7. Optionally, you can assign an author to a group and/or configure Library folder permissions using the Groups and Permissions tabs.

7.1.4 Delete Author

You can remove any author that appears in the list. Deleting an author will prevent the author from logging into the Library; however, this does not prevent the author from starting the Developer.

If you change or delete another author's name, you (administrator) will receive a warning message about the following consequences that will take place if the operation continues:

- The checkout of any document by the author is overridden and any changes that were made by the author are lost.
- Any new document created by the author that was not checked in will be lost (the author cannot check their new documents in with the new or deleted author name).
- If the author is logged in to the Developer at the time the name was changed or deleted, the author will be automatically logged out and left disconnected in the Developer. The author will also need to create a new Login Profile with their new credentials if their name was deleted.

If the deleted author had edited documents that display his/her author name in Document History, that name will remain in the history.

Note: You cannot delete the only administrator. Also, an administrator cannot delete their own author name while they are using Author Management.

To delete an author:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.

4. Select the author that you want to delete and click **Delete selected author**.

5. Respond to the message concerning checked out documents to confirm the author deletion.

7.1.5 Change Password

You can change your current password at any time while you are working online. You are prompted for the new password the next time you log in.

Note: If you stored your password in a login Profile, it will be automatically updated when you complete the password change.

To change your password:

1. Make sure you are working online.

2. On the **Tools** menu, choose **Change Password**.

3. Enter your current password.

4. Type a new password.

5. Type the new password again to confirm the change.

6. Click **OK**.

7.2 Manage Library Permissions

Depending on your multi-user authoring environment and needs, it may be important to control who can access content in the Library and how it can be accessed. The Developer allows you to set the following permissions on any folder and its contents.

The following permissions can be set for any folder in the Library:

- **List Folder Contents**: Authors cannot save to folders with this permission. An author can view the names of documents in a Library folder but cannot open a document in any editor and perform actions that would change the document content or its location in the Library. An author also cannot make a copy of the document in any way.

- **Read**: An author can open a document in an editor, but cannot perform any actions that would change the document content or its location in the Library. An author can make a copy (including Save as) of the document and store it in a folder location to which they have appropriate permissions.

- **Modify**: An author has complete access to the folder and its documents and can perform any action (create, modify, copy, delete, publish, export, and so on).

When an author works in a folder with documents that have List or Read permissions, they are alerted when they cannot perform an action due to permission restrictions. Each folder and document in the Library (or the Details view of the Outline Editor) displays the active permission setting in the Permission column which can appear in any view.

Authors should understand the following publishing consideration for documents that have a mix of List and Read permissions. If you open a module or section (in the Outline Editor) with Read or Modify access that contains links to other documents with List access, the documents with List access do not appear in published output.

An author **cannot** publish content with List Folder Contents permission to the System/Publishing/Styles folder. You should make sure that all authors have at least Read permission to the appropriate Publishing Project documents in this folder.

Also note that an author cannot assign roles to documents with List Folder Contents permission to the System/Roles folder. In general, all authors should have at least Read permission to the System folder or any subfolder within it. If an author has List Folder Contents permission to the System folders, functions such as publishing/preview, role and template assignment, topic editing and recording, attachment icon assignment, and so on, will **not** work.

Note: You must work online to configure security permissions.

You can assign these permissions to each folder in the Library for any author or group (or a combination of both). A group is a collection of authors that makes permission assignment easy. For example, you configure a folder permission for each author individually or you configure a folder permission for a group of several authors.

Note: If conflicting folder permissions are set for an author that has membership in multiple groups, the least restrictive permission is used.

When you add a new author without setting explicit folder permissions, the author is automatically added to a group called "Everyone". By default, this group is configured with Modify permission to all folders in the Library (from the root folder). Keep this in mind as you begin to configure folder permissions for new authors or groups. For example, you may want to consider changing the permission on the Everyone group first and then set permissions for an author or other group. Or, you can leave the Everyone permission setting as is and further restrict permissions for an author or other group.

Note: You cannot remove an author from the Everyone group. The Everyone group cannot be deleted.

Permission inheritance

Inheritance allows administrators to easily assign and manage permissions. Inheritance automatically causes objects (documents or folders) within a container (folder) to inherit all of the permissions of that container. For example, documents within a folder, when created, inherit the permissions of the folder. Similarly, subfolders created within a folder inherit the permission of the parent folder. However, you can always change the permissions of any subfolder and override those inherited from its parent.

Assigned and Effective permissions

Permissions can either be explicitly assigned to an author or in effect due to folder inheritance or group membership. Explicitly assigned author permissions take precedence over group permissions when assigned to the same folder. You can view Assigned and Effective permissions using the Folder Permissions command.

Lost documents

Lost documents (new or edited documents) can result if permissions change when an author is working offline. For example, if an author had Modify permissions to a folder and then went offline while the administrator changed your permissions to List Folder Contents. Any new or edited document will be identified as a lost document when the author reconnects and begins working online. If this happens, an author can display the Lost documents view and recover the documents by moving them to a folder with valid permissions. The status bar of the Developer displays a message when lost documents are detected.

7.2.1 Assign Folder Permissions to an Author

You can assign folder permissions to an author when you add or edit an author. Explicit author permission assignments of this nature take precedence over any group permissions that were assigned to the same folder.

To assign/remove folder permissions to an author:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.
4. Click **Add new author** or click **Edit selected author**.
5. Click the **Permissions** tab.
6. Click **Add** and select a Library folder (you can also make a new library folder).

   A default permission is automatically applied.
7. Click the **Permission** cell and choose a permission from the list.
8. Repeat these steps to assign as many permissions as you need.
9. Click **OK**.

7.2.2 Remove Folder Permissions from an Author

You can remove any permission assignment that you make by editing an author.

To remove folder permissions assigned to an author:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Authors**.
4. Select an author and click **Edit selected author**.
5. Click the **Permissions** tab.
6. Select an existing permission and click **Remove**.

   You can select only one permission at a time.
7. Confirm the deletion.
8. Repeat steps 6 and 7 to remove additional permissions, if desired.
9. Click **OK**.

7.2.3 Add or Edit a Group

You can create groups to facilitate making permission assignments for many authors. For example, if you have multiple authors that will require the same access to content, it is easier to create a group with the appropriate permission settings and assign all authors that need that access to that group.

When you add or edit a group, you can do the following:

- Assign authors to a group
- Assign folder permissions to a group

Note: You can change the sort (ascending or descending) of items in the list by clicking a column title.

To add/edit a group:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Groups**.
4. Click **Add new group** or click **Edit selected group**.
5. On the **General** tab, enter a unique **Group Name**.
6. Enter a **Description** for the group. This can be any text that you want to describe the group in more detail. This text will appear in the Description column on the Group Management dialog box.

   You can either click **OK** now to save the group or continue to assign authors and permissions to the group as described next.
7. Click the **Members** tab and select the authors to include in the group.
8. Click the **Permissions** tab.
9. Click **Add** and select a Library folder (you can also make a new library folder).

   A default permission is automatically applied.
10. Click the **Permission** cell and choose a permission from the list.
11. Repeat these steps to assign as many permissions as you need.
12. Click **OK**.

7.2.4 Add Author to a Group

For any new or existing group, you can add or remove authors.

To add authors to a group:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Groups**.
4. Click **Add new group** and enter a name and description.

   or

   Select an existing group and click **Edit selected group**.
5. Click the **Members** tab and select the authors to include in the group.
6. Click **OK**.

7.2.5 Assign Folder Permissions to a Group

You can assign folder permissions to a group when you add or edit a group.

To assign/remove folder permissions to an author:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Groups**.
4. Click **Add new group** and enter a name and description.

   or

   Select a group and click **Edit selected group**.
5. Click the **Permissions** tab.
6. Click **Add** and select a Library folder (you can also make a new library folder).

   A default permission is automatically applied.
7. Click the **Permission** cell and choose a permission from the list.
8. Repeat these steps to assign as many permissions as you need.
9. Click **OK**.

7.2.6 Delete a Group

Deleting a group removes the group, author assignments, and the permissions assigned to the group (and subsequently the authors included in the group) but it does not delete the authors from the database.

Note: You cannot delete the Administrators and Everyone groups.

To delete a group:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage Groups**.
4. Select the group that you want to delete and click **Delete selected group**.
5. Confirm the group deletion.
6. Click **Close**.

7.2.7 View Folder Permissions

As an administrator, you can view all active permissions for each folder in the Library as well as modify any of the existing permissions or create new permissions.

The following two tabs display the permissions for the selected Library folder. Each tab displays the author or group followed by the permission.

- **Assigned Permissions**: Displays the permissions that were explicitly assigned to an author or group. You can add new author or group permissions or remove any permission that appears. Your changes on this tab are also reflected when you review group or author permissions using the Manage Authors or Manage Groups commands.

- **Effective Permissions**: Displays the permissions that are in effect from explicit author assignment and group membership, as well as any permissions inherited from a parent folder. The Derived from group or folder displays the source of the permission assignment. For example, the source can be from an explicit assignment to an author, the result of group membership, or parent folder inheritance.

Note: You can change the sort (ascending or descending) of items in the list by clicking a column title.

To view folder permissions:

1. Log in as an administrator.
2. Make sure you are working online.
3. Select a folder in the Library.
4. On the **Administration** menu, choose **Folder Permissions**.

   The Assigned Permissions tab displays the permissions explicitly set for the selected folder. You can use the following icons to assign new permissions or remove existing permissions.

   - add a new author permission. Choose an author and then click the **Permission** cell and choose a permission from the list.

   - add a new group permission. Choose a group and then click the **Permission** cell and choose a permission from the list.

   - removes the selected author or group permission.

   Click the **Effective Permissions** tab to display all permissions that are in effect from explicit author assignments and group membership, as well as any permissions inherited from a parent folder.

   The Author or Group column displays the author or group with permission to the selected folder. The Permission column displays the permission to the folder that is in effect. The Derived from folder or group column identifies the source of the permission. For example, this column can display the name of the group if a permission is derived from group membership, a folder name if the permission is inherited from a parent folder, or assigned if the permission is explicitly assigned to an author.

   After reviewing the Effective Permissions tab, you can return to the Assigned Permissions tab to modify the permissions for the folder you are viewing. You can also adjust permission assignments using the Manage Authors or Manage Groups command. You may also consider changing parent folder permissions if the permission inheritance provides inappropriate results.

5. Click **OK** to save your changes.

7.3 Administer the Content Library

As an author with administrator privileges, you can perform the following tasks that impact the content in the Library:

- Manage State Values
- Override Document Check Out

7.3.1 Manage State Values

State is an editable property for communicating the status of a document. This is particularly helpful when working with other authors in a development team. Authors can assign a state to any document using the values that are defined in the master list. The default master list of State values includes Not Started, Draft, In Review, and Final (in the language installed on the server). Administrators can customize the list by adding, deleting, or renaming the values as well as sequencing the values as they will appear on the assignment list from the Properties pane.

Note: You must be online to work with State values.

7.3.1.1 Add a State Value

You can have as many State values as you want in addition to the defaults that are provided. You should consider adding values that identify a particular milestone, event, or state in the process of document development. For example, if you localize your content, you might want various State values that identify that a document is ready for translation, in the process of translation, or back from the translation vendor and ready for final production.

To add a State value:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage State Values**.
4. Click **Add new value** and type a new value.
5. Click **OK** to save the value and return to the master list.
6. Click **Move value up** or **Move value down** to reposition the new value where you want it to appear in the list.
7. Click **OK** to close the Manage State Values dialog box.

7.3.1.2 Delete a State Value

If you delete a State value that is assigned to any documents, the State property for these documents is automatically set to blank.

Note: Documents that are checked out to authors prior to the deletion of a State value will be processed once they are checked back in to the server.

To delete a State Value:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage State Values**.
4. Select the value that you want to delete and click **Remove value from list**.

   If the value you selected to delete was assigned to any document you are alerted that the State value is in use and that all documents with this State value will be reset to

blank. Confirm that you want to proceed or cancel the operation.

5. Click **OK** to close the Manage State Values dialog box.

7.3.1.3 Rename a State Value

If you rename a State value that is assigned to documents, the State property for these documents is automatically reset to blank.

Note: Documents that are checked out to authors prior to the rename of a State value will be processed once they are checked back in to the server.

To rename a State value:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage State Values**.
4. Click **Edit value** and modify the existing value.
5. Click **OK** to save the value and return to the master list.
6. Click **OK** to close the Manage State Values dialog box.

7.3.1.4 Sequence State Values

Authors can assign State values to documents using the State property on the Properties pane (Workflow category). To make an assignment, the author will choose a value from a list. The sequence of the values on that list will match the order that you define on the Manage State Values dialog box. You might want to define and sequence Content State Values that mirror the status and milestones of your content development process.

To sequence State values:

1. Log in as an administrator.
2. Make sure you are working online.
3. On the **Administration** menu, choose **Manage State Values**.
4. Select one State value and click **Move value up** or **Move value down** to move the value to the new position in this list.
5. Click **OK** to save the changes.

   You can also click Cancel if you do not want to save your changes.

7.3.2 Override Checked Out Documents

As an administrator, you can force a document that is checked out to any author to check back into the server. This command may be needed if an author has a document checked out, and goes on vacation or is otherwise unavailable to check in the document. With an administrative override, any of the local changes that an author may have made will be lost. The document will return to the last version that exists on the server.

Note: Since this command works directly against the server, it can only be performed online. Additionally, this action cannot be undone.

You can select one more documents on which to override the check out.

To override a checked out document:

1. Log in as an administrator.
2. Make sure you are working online.
3. From the Library or Outline Editor, select the document(s) that another author has checked out.

   If you use the Outline Editor, switch to the Details view so you can see the Checked out by column and locate that documents that are checked out to the author.
4. On the **Administration** menu, choose **Override Check Out**.
5. Choose Yes to discard the changes that another author may have made to the checked out documents.
6. Respond to the Related Documents prompt if your selection included related documents.

   The Related Documents dialog box appears when you perform an action on any document that has links to other documents. You can choose to process only the document(s) you selected or to process your selection and all of the related documents.

   Click the View related documents link to display a list of the related documents if you are not sure whether you want to include related documents.

   After you have made your selection, click **OK**.

   You might also receive a message if some documents could not be processed because of other constraints. You can click OK to close the message box or click the View activity log link to view the results of the action.

7.3.3 Purge Deleted Documents

When authors delete version-controlled documents in a multi-user environment, the documents are marked for deletion but are not deleted from the Library. Authors can then restore any document that is marked for deletion from the Deleted Documents view in the Library.

As an administrator, you may want to purge deleted documents from the Library to permanently remove them. Purged documents cannot be restored by any author. When you purge a document, all versions and history are permanently removed from the database. Any document that links to the purged document will have broken links (identified by the text "Missing document") that authors will need to manually remove.

To purge one or more documents, you must be working online and have Deleted Documents View of the Library displayed. Then you can either selectively purge documents from the list or purge all documents on the list at once.

Note: You should ensure that no author is attempting to restore a document that you are purging. Errors may occur if any author attempts this at the same that you perform a purge.

To purge selected documents:

1. Log in as an administrator.
2. Make sure you are working online.

3. From the Library, switch to the Deleted Documents View.
4. Select the document(s) that you want to purge from the Library.
5. On the **Administration** menu, choose **Purge**.
6. Choose **Yes** to purge the selected documents.

To purge all documents:

1. Log in as an administrator.
2. Make sure you are working online.
3. From the Library, switch to the Deleted Documents View.
4. On the **Administration** menu, choose **Purge All** to permanently delete all documents in the view from the Library.

8 Installed Utilities

During the installation of the Developer and Knowledge Center, a number of utilities are installed. Some of these utilities remain on the machine after installation is complete. Some utilities are compiled into the installer for use during the installation process and are automatically deleted when the installation is complete. This chapter describes the utilities that are installed during the installation process.

8.1 Developer Utilities

These utilities are installed during the Developer installation process.

- **CommandLinePublish.exe**: Performs the publishing process from the command line. See the *Command-Line Publishing* in the Publish Content module for more information on command-line publishing.
- **EvntView.exe**: Opens various logs generated by Developer to capture recognition errors.
- **inappconfig.cmd**: Batch file to launch the Configuration Utility for In-Application Support.
- **inappconfig_ff.cmd**: Batch file to launch the Configuration Utility for In-Application Support in the Firefox browser.
- **LicenseCopy.exe**: Makes a copy of an existing license file with elevated rights to copy into the Program Files directory.
- **OdArc.exe**: Compresses Developer content from a source folder into an archive file. Can also extract content from an archive file to a destination folder.
- **OdDev.exe**: Main Developer executable that provides the interface for creating content.
- **Play.exe**: Launches the published content in the Player.
- **StartOdtpc.exe**: Standalone Topic Player utility that allows the user to launch previously recorded topics published as standalone topic files.
- **TemplateEditor.exe**: The Template Editor is a tool included with the Developer that provides an interface that enables you to easily edit the template.xml file to customize a template. See *Starting the Template Editor* in Customize Templates for more information on the Template Editor.
- **x64HookHost.exe**: Starts the x64 proDatabase Post Install.execessing engine on an x64 operating system. This executable is started automatically by the Topic Recorder when a recording session starts and automatically stops when the recording session ends.
- **DragViewX64Loader.exe**: Provides a gateway for the unmanaged diagnostic messages from x64 processes. This executable starts automatically when diagnostic mode is enabled.
- **TraceViewX64Loader.exe**: Provides a gateway for the unmanaged trace messages from x64 processes. This executable starts automatically when TraceView is started on an x64 operating system.
- **SmartHelpSetup.exe**: Installs the SmartHelp plug-ins for Firefox and Internet Explorer.

These utilities are compiled into the installer, used during installation, and then deleted during the Developer installation process.

- **DatabaseUpdater.exe**: Utility used by the installer to update the database schema and information in the database after the database scripts are run by the installer, or if the scripts were run manually before running the installer.

- **LibraryLoader.exe**: Utility used by the installer to load the initial library files used by the Developer to upgrade the library of an existing installation of the Developer, and/or to authenticate the user information entered when upgrading an existing installation of the Developer.

- **InstallFiles.exe**: Utility used by the installer to install the help systems.

- **UninstallHelper.exe**: Utility used by the Knowledge Pathways Web Server 5.5 uninstaller to restore virtual directories in use that were removed during uninstallation. This utility is only installed if a Knowledge Pathways Web Server 5.5 virtual directory was updated during installation, and will be removed by the Knowledge Pathways Web Server 5.5 uninstallation.

8.2 Knowledge Center Utilities

These utilities are installed during the Knowledge Center installation process.

- **UserImport.exe**: Imports user names and password information from a file or database into the Knowledge Center. See *Import User* in the Manage Users section of the User and Content Management manual for more information.

- **UsageTrackingConversionWin.exe**: Converts Usage Tracking data in a Usage Tracking database into the Knowledge Center database, including user, topic tracking, and reporting information.

- **KP_UserImportWrapper32.exe**: Adds support for 32-bit Excel installed on 64-bit operating system for User Import Utility

These utilities are compiled into the installer, used during installation, and then deleted during the Knowledge Center installation process.

- **UsageTrackingConversionCmd.exe**: Command line utility used by the installer to convert Usage Tracking data in a Usage Tracking database into a Knowledge Center database, including user, topic tracking, and reporting information.

- **InstallFiles.exe**: Utility used by the installer to install the help systems.

- **UninstallHelper.exe**: Utility used by the Knowledge Pathways Web Server 5.5 uninstaller to restore virtual directories in use that were removed during uninstallation. This utility is only installed if a Knowledge Pathways Web Server 5.5 virtual directory was updated during installation, and will be removed by the Knowledge Pathways Web Server 5.5 uninstallation.