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KANA Response Live Server Installation Guide

KANA Response Live
Version 10R3

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KANA Response Live Server Installation Guide

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Preface

Purpose

The *KANA Response Live Server Installation Guide* describes how to install and configure KANA Response Live.

Important! Who Should Read this Guide?

KANA Response Live 10 R3 is certified on Linux and Windows. If you want to install Response Live on another platform, or to install another version of Response Live, contact KANA Support for assistance with obtaining Response Live versions 10 R1 or 10R2:

- Visit **support.kana.com**
- Call (866) 753–KANA

Write **support@kana.com**

Audience

This book is intended for:

- Professional Services personnel who install Response Live at customer sites.
- Customers with technical expertise.

For more information see *KANA Response Live User Guide*.

Organization

KANA Response Live Server Installation Guide is organized as follows:

Chapter	Description
Preparing to Install Response Live Server on UNIX	Describes the system requirements to install the KANA Response Live Server on a UNIX platform, such as Solaris or Linux. Defines the installation prerequisites, such as hardware and software requirements for a UNIX platform.
Creating the Database Instance	Describes how to create the database instance for a UNIX platform database server.
Installing the KANA Response Live Server on Linux	Contains the steps you need to take to install the KANA Response Live Server on Solaris or Linux.
Creating the Database Instance	Describes how to create the database instance for a UNIX platform database server.
KANA Response Live Server Troubleshooting Tips for UNIX	Describes problems, possible causes and fixes you may encounter during installation.
Preparing to Install the KANA Response Live Server on Windows	Contains the steps you need to take to install the KANA Response Live Server on Windows. Defines the installation prerequisites, such as hardware and software requirements for a Windows platform.
Creating the SQL Server Database Instance	Describes how to create the database instance for a Windows/SQL Server.
Installing the KANA Response Live Server on Windows	Contains the steps you need to take to install the KANA Response Live Server on Windows.
KANA Response Live Server Troubleshooting Tips for Windows	Describes problems, possible causes and fixes you may encounter during installation.
Testing the Installation	Contains the tests to verify that the KANA Response Live Server is installed and configured correctly.
Appendix A: KANA Response Live Log files	Defines the log files and corresponding expectation files that are a result of a KANA Response Live installation.

Typographical Conventions

This document uses the following typographical conventions:

Convention	Usage
Bold	File names and URLs
`Input`	User input and system output
Italic	Emphasis and book titles
Arrow (➤)	Indicates the start of a procedure
Pipe symbol (|)	Identifies the path of menu commands used in a procedure (File | Save, for example)

Other Product Documentation

The following KANA Response Live manuals can help get you acquainted with the product. They also provide detailed information on the concepts discussed in this guide.

KANA Response Live documentation

Book Title	Description
KANA Response Live Getting Started Guide	Describes for both technical and non-technical users what a KANA Response Live platform is and its use in customer service and training. Introduces cobrowsing, user roles, implementation types and scopes, and KANA Response Live technology through simple scenarios. A more detailed scenario describes more technical KANA Response Live details for technical users.
KANA Response Live Chat User Guide	Describes the basic multi-chat user experience from an agent's perspective. Includes how to log in, what to expect, and how to perform common operations.
KANA Response Live Chat Deployment Guide	Describes the basic steps in deploying a KANA Response Live installation, including installing and customizing the launch code.
KANA Response Live Cobrowse User Guide	Describes the agent and customer KANA Response Live user experience for cobrowsing.

Book Title	Description
KANA Response Live Organization Administration Tool User Guide	Describes creating and editing iChannels, creating supervisor accounts, assigning agents to supervisors, creating agent accounts and agent groups, and writing business rules. Also, describes the log on process.
KANA Response Live Active Clustering Guide	Highlights the scalability, load balancing, and reliability aspects of a KANA Response Live deployment, and describes how KANA Response Live active clustering is used to improve your system deployment.
KANA Response Live Metrics API Guide	Describes the Metrics API and authentication API used to enhance, integrate, or implement KANA Response Live functionality.
KANA Response Live Supervisor Console User Guide	Describes a supervisor's experience using the KANA Response Live Supervisor Console. Includes how to log in, what are the queue statistics, and how to use the action windows to make changes that will increase queue performance.
Response Live Monitoring Tool Guide	Explains how to install and use the KANA Response Live Monitoring Tool.
Response Live Localization Guide	Provides a detailed description of the steps required to internationalize and localize KANA Response Live.
KANA Response Live System Administration Tool User Guide	Describes how system administrators configure iSystems, organizations, routers, queue managers, and queue containers and create organization administrator accounts for on-premise implementations. Also, describes the log on process.

Third Party Documentation

In addition to KANA Response Live documentation, the following third party documentation is also recommended.

- SSL Certificates:

  Documentation on installing SSL certificates from Verisign is available online at:

  http://www.verisign.com/support/site/secure/install.html

Available formats

Technical documentation for this product is available in

- Portable Document Format (PDF)
- The online Help format

Note: You need Adobe Acrobat Reader to read PDF documents. This product is available free from Adobe at the following location:

http://www.adobe.com/products/acrobat

Other Sources of Information

You might need information that is not contained in the printed or online documentation, or you might have questions that are not related to a particular product. Following are some additional resources for you.

Company news

To learn more about KANA products, services, and company news, visit our Web site at **www.kana.com**.

Technical Support

To contact KANA Technical Support:

- Visit **support.kana.com**
- Call (866) 753–KANA
- Write **support@kana.com**

Chapter

1

Preparing to Install Response Live Server on UNIX

This section is intended for system administrators who are responsible for installing KANA Response Live software on UNIX systems, such as Linux.

It may also be helpful to read the "KANA Response Live Getting Started Guide."

A KANA Response Live system is a web browser-based application that facilitates sales representatives or *agents* in helping remote customers to view, navigate, and complete forms on web sites. Customers can view the changes or initiate changes in their own browsers. This is called *cobrowsing*. The customer and agent can stay in contact while cobrowsing by talking on the phone or communicating via online chat.

Once the system requirements are met as described in "Chapter 7: Preparing for the Installation" you can install a KANA Response Live server. To install KANA Response Live server:

1. Create a KANA Response Live database instance. See "Chapter 2: Creating the Database Instance."
2. Install an SSL Certificate.

   Generating a valid SSL certificate can be completed, on average, within 5 – 10 minutes. Although SSL certificate installation and key generation can be completed in 5 – 10 minutes, it typically takes 2 – 4 days to have the certificate signed by a company such as Verisign. You

can obtain the certificate from your preferred company. Refer to your Operating System or Apache documentation for complete instructions on obtaining an SSL certificate and installing it.

3 Install the KANA Response Live server software. See "Chapter 3: Installing the KANA Response Live Server on Linux." The installation also creates the database schemas and populates the database with some default data values useful for testing. The KANA Response Live server installation package can be installed from the web as an FTP download.

4 Test the installation using the default start page, organization, and iChannel provided by the KANA Response Live installation. See "Chapter 9: Testing the Installation."

An iChannel in an organization provides additional structure to a KANA Response Live platform and relates to agents and skill based routing. You can learn more about iChannels in other Response Live guides, for example, the *KANA Response Live Getting Started Guide* (ResponseLiveGettingStartedGuide.pdf).

Preparing for the Installation

Before installing the KANA Response Live server:

- Review this guide.
- Make sure your system meets the specified requirements and that you have `root` privileges.
- Backup any necessary documents or applications.
- If you are installing from the web, create a directory for the files you need to download. The installation must be performed from the directory in which the installation file was downloaded. Download the install package from KANA's download site. This site is password protected. Obtain the password from your KANA sales representative.
- Make sure the system has a fully configured DNS. The server must be using an active and accurate DNS server to resolve addresses. The server must also be registered with DNS so that client computers can find the server. If you plan to run client web browsers connected over the Internet, this requirement might involve changing your firewall or proxy configurations.
- Have an understanding of SSL certificates.

Hardware Requirements

Hardware Requirement for KANA Response Live Server

Table 1 lists the minimum and recommended hardware requirements for the system on which the KANA Response Live server software is to be installed, such as Linux.

Table 1 Hardware Requirements

	Minimum
Processor	Dual CPU 2 GHz or equivalent
RAM	2 GB
Disk Space	1 GB free space on the installation drive
Swap Space	1 GB

Hardware Requirement for KANA Response Live Database Server

Table 2 lists the minimum and recommended hardware requirements for the system on which the KANA Response Live Database Server software is to be installed, such as Linux.

Table 2 Hardware Requirements

	Minimum
Processor	Dual CPU 2 GHz or equivalent
RAM	2 GB
Disk Space	1 GB free space on the installation drive
Swap Space	1 GB

Hardware Requirement for the Agent Browser

Table 3 lists the minimum and recommended hardware requirements for the system on which the KANA Response Live agent browser is to be installed.

Table 3 Hardware Requirements

	Minimum
Processor	Dual 1 GHz
RAM	1 GB
Disk Space	128 MB free space on the installation drive
Screen Resolution	1024x768 minimum screen resolution for correct presentation.

Software Requirements

Supported Configurations

These are the supported configurations for Response Live.

- Linux/Oracle stack
- Windows/SQL Server stack

Important! KANA Response Live 10 R3 is only certified on Linux and Windows. For help, or to install another version of KANA Response Live, please contact Technical Support.

Table 4 lists the Linux software and database requirements for the KANA Response Live server.

Table 4 Software Requirements

Application Server OS	Web Server	Database Type	Database OS	Database Encoding
Red Hat Linux 4.6	Apache 2.0/Tomcat 5.5.9	Oracle 10.2.0.3	Red Hat Linux 4.6 (Not in VMWare)	UTF-8
VMWare – VMWare ESX servers 3.0.4				

Database Requirements

Table 4 lists the database requirements for the KANA Response Live server software installation. The KANA Response Live server installation programs require that a database server be installed and running with a KANA Response Live database instance created.

The installation program does not automatically create an instance of an Oracle or DB2 database. To create an Oracle database instance, see "Chapter 2: Creating the Oracle Database Instance."

Installing and Configuring Port Redirectors

To install KANA Response Live when the database is not running on the standard port, a port redirector can be used. The port redirector can be run on the same machine on which the KANA Response Live server is running, or on the database server. The port redirector gets the database

requests from the KANA Response Live server and sends these requests to the server:port of the database server.

You can use third party tools based on your setup environment.

Supported Upgrade Paths

The supported Response Live migration paths for Linux are:

- Response Live 9.5
- Response Live 10 R2

Before upgrading a KANA Response Live server, make sure your system meets the requirements detailed earlier in this guide.

Upgrade KANA Response Live 9.5 Server to 10 R3

Before upgrading a KANA Response Live server:

1. Make sure your system meets the requirements detailed earlier.
2. Stop all the servers. For example, stop the Web server (IIS) and the KANA Response Live server. Not stopping the servers is usually the cause of incomplete upgrades. If the servers are running, some KANA Response Live files cannot be upgraded because the files are in use.
3. Make a backup copy of the entire current installation. This is located in the /usr/local/kana/ folder.
4. Make a backup of the Response Live database.
5. Back up all customization files.
6. Remove the old installation. See "Chapter 5: Installing the KANA Response Live server" for information on uninstalling KANA Response Live server.
7. Install the new KANA Response Live software and point to the existing database.
8. Update the Response Live database schemas and seed data accordingly:

Schema Changes: Open /usr/local/kana/db/<your db type>/SchemaCreation.sql. For Oracle Server: /usr/local/kana/db/oracle/SchemaCreation.sql. Copy the table create statements for the following tables:

CALENDAR

METRIC_SURVEY_RESPONSE

METRIC_ICHANNEL_STATE_CHANGE

METRIC_CHAT_SESSION_DENIED

Execute against the database

Check all the above tables are available by selecting them.

Seed Data Changes: The script assumes the IDs in steps a - e have not changed (1 is the default ID for all these components). If the IDs have changed, then you need to find the ID and run an update statement for that ID. A simple

select statement on the appropriate table will show the ID of the component.

a TABLE CODEBASE _VERSION (CODEBASE_VERSION_ID,VERSION_LABEL):
INSERT INTO CODEBASE_VERSION VALUES (103,'V10.3');

b TABLE QUEUE_CONTAINER:
UPDATE QUEUE_CONTAINER
SET CODEBASE_VERSION_ID = 103 WHERE
QUEUE_CONTAINER_ID = 1

c TABLE QUEUE_MANAGER:
UPDATE QUEUE_MANAGER
SET CODEBASE_VERSION_ID = 103 WHERE QUEUE_
MANAGER_ID = 1

d TABLE SERVER_POOL:
UPDATE SERVER_POOL
SET POOL_CODEBASE_VERSION_ID = 103 WHERE
SERVER_POOL_ID = 1

e TABLE SERVER_DESCRIPTION:
UPDATE SERVER_DESCRIPTION SET CODEBASE_VERSION_ID = 103 WHERE SERVER_DESCRIPTION_ID = 1

9 Report Views should be created manually by running the script from the following location:

a Log on to the Response Live server.

b In SchemaCreation.sql, from /usr/local/kana/db/<your database type: Oracle/SQL/DB2>

c Drop the AGENTPRODUCTIVITYVIEW and INTERACTIONVIEW if they exist. You will recreate them in a subsequent step.

d In the case of the SQL Server database, if the database user is not the database owner, make the following change to the InterActionView script: change "dbo.chatTranscriptConcat" to "[user_name].chatTranscriptConcat". This change is not required if the database user is the database owner

e Execute AGENTPRODUCTIVITYVIEW, INTERACTIONVIEW, SYSTEMTRIGGEREDRULEVIEW, ACTIONPERFORMANCEBYAGENTVIEW, AGENTTRIGGEREDACTIONVIEW and

PROACTIVECHATENTRYPAGESVIEW on your Response Live db instance

10 The default value for Service Unavailability needs to be set up for every Organization. In order to do this, execute the following set of statements for each Organization:

   a INSERT INTO ORGANIZATION_CONFIG_PROP (ORGANIZATION_ID, NAME, VALUE, TIME_MODIFIED) VALUES ([ORGANIZATION_ID], 'svc.unavailable.unavailable.msgtype', 'text/html', CURRENT_TIMESTAMP)

   b INSERT INTO ORGANIZATION_CONFIG_PROP (ORGANIZATION_ID, NAME, VALUE, TIME_MODIFIED) VALUES ([ORGANIZATION_ID], 'svc.unavailable.unavailable.msg', 'Chat service is currently unavailable. Please try again later.', CURRENT_TIMESTAMP)

   c INSERT INTO ORGANIZATION_CONFIG_PROP (ORGANIZATION_ID, NAME, VALUE, TIME_MODIFIED) VALUES ([ORGANIZATION_ID], 'bizhours.unavailable.msgtype', 'text/html', CURRENT_TIMESTAMP)

   d INSERT INTO ORGANIZATION_CONFIG_PROP (ORGANIZATION_ID, NAME, VALUE, TIME_MODIFIED) VALUES ([ORGANIZATION_ID], 'bizhours.unavailable.msg', 'You have reached us during non-business hours. Please contact us during regular business hours.', CURRENT_TIMESTAMP)

11 Update the launch code on your Web site.

12 Update the newly created config.properties file with the changes made to the previous config.properties file.

13 Apply any customization (including tracker actions related files) carefully.

14 Start the Response Live Server.

15 Test the Installation.

Important! If you are running a Response Live – Response integration, after performing all the steps and restarting the Response Live Server:

- Go to the properties page of each iChannel and map it to the correct queue.

- Ensure rules are created in Response to route Chats from the iChannel to the correct queues.
- For more information, read the "Mapping iChannels to Response Queues" section in The *KANA Response – Response Live Integration Guide* (ResponseLiveIntegrationGuide.pdf).

Upgrade KANA Response Live 10 R2 Server to 10 R3

Before upgrading a KANA Response Live server:

1. Make sure your system meets the requirements detailed above.
2. Stop all the servers. For example, stop the Web server (IIS) and the KANA Response Live server. Not stopping the servers is usually the cause of incomplete upgrades. If the servers are running, some KANA Response Live files cannot be upgraded because the files are in use.
3. Make a backup copy of the entire current installation. This is located in the /usr/local/kana folder.
4. Make a backup of the Response Live database.
5. Back up all customization files.
6. Remove the old installation. See "Chapter 5: Installing the KANA Response Live server" for information on uninstalling KANA Response Live server.
7. Install the new KANA Response Live software and point to the existing database.
8. Update the Response Live database by seeding the data accordingly:

Seed Data Changes:

The script assumes the IDs in steps a - e have not changed (1 is the default ID for all these components). If the IDs have changed, then you need to find the ID and run an update statement for that ID. A simple select statement on the appropriate table will show the ID of the component.

a. TABLE CODEBASE _VERSION (CODEBASE_VERSION_ID,VERSION_LABEL):
INSERT INTO CODEBASE_VERSION VALUES (103,'V10.3');

b. TABLE QUEUE_CONTAINER:
UPDATE QUEUE_CONTAINER
SET CODEBASE_VERSION_ID = 103 WHERE
QUEUE_CONTAINER_ID = 1

c. TABLE QUEUE_MANAGER:
UPDATE QUEUE_MANAGER
SET CODEBASE_VERSION_ID = 103 WHERE QUEUE_
MANAGER_ID = 1

d TABLE SERVER_POOL:
UPDATE SERVER_POOL
SET POOL_CODEBASE_VERSION_ID = 103 WHERE
SERVER_POOL_ID = 1

e TABLE SERVER_DESCRIPTION:
UPDATE SERVER_DESCRIPTION SET CODEBASE_VERSION_ID
= 103 WHERE SERVER_DESCRIPTION_ID = 1

9 Update the newly created config.properties file with the changes made to the previous config.properties file.

10 Apply any customization (including tracker actions related files) carefully.

11 Start the Response Live Server.

12 Test the Installation.

Important! If you are running a Response Live – Response integration, after performing all the steps and restarting the Response Live Server:

- Go to the properties page of each iChannel and map it to the correct queue.
- Ensure rules are created in Response to route Chats from the iChannel to the correct queues.

For more information, read the "Mapping iChannels to Response Queues" section in The *KANA Response – Response Live Integration Guide* (ResponseLiveIntegrationGuide.pdf).

Third Party Documentation

The following third party documentation is recommended.

- **SSL Certificates:** Documentation on installing Verisign SSL certificates is available at: http://www.verisign.com/support/site/secure/install.html

Chapter

2

Creating the Database Instance

You must have one of the required database servers running before installing the KANA Response Live Server software.

This chapter describes how to create a Response Live database instance for an existing database server.

Creating the Oracle Database Instance

This section provides steps on creating the database instance for the Oracle Database Server.

1. Configure a tnsname entry to the target database from the Application Server. The same operation can be done either by invoking netca executable, which is present in $ORACLE_HOME/bin directory or by editing tnsnames.ora file that is present in the $ORACLE_HOME/network/admin directory.
2. Log in through the SQLplus utility to the target database.
   - Enter the DB User/Schema name
   - Enter the DB User/Schema password

     For example, sqlplus> connect user/password@tnsname
3. Create an Oracle database user and password for connecting to the Response Live application by executing the following command:

   ```
   sqlplus> create user <username> identified by <password>
   default
   tablespace <users> temporary tablespace <temp>;
   ```

   The default available tablespace for the Oracle database is “users” and “temp”. Please check with the DBA for the name of the default available tablespace for the database.

   Because of recent changes in Oracle10g, database roles have been deprecated, and the 'CONNECT' user role no longer grants users the ability to create views, and must be done manually. See Step 5.
4. Grant necessary privileges to the dbuser created by executing the following command:

   ```
   sqlplus> grant connect, resource, create view to <username>
   ```
5. To check whether the dbuser has been created successfully:
6. Log in as dbuser using the following command: sqlplus> connect user/password@tnsname.

Chapter

3

Installing the KANA Response Live Server on Linux

To install from the Web, create a folder for the file you need to download. The installation must be performed from the folder in which the installation file was downloaded. Download the install package from KANA's download site. This site is password protected. Obtain the password from your KANA sales representative.

The installation program installs the KANA Response Live software and creates a default organization and iChannel as well as default database entries and user accounts. It also installs Tomcat, if you run an installation package that includes a Tomcat server.

When installing via the FTP download, an additional 200 MB of disk space is required to store the installation package.

The following steps are for Linux. Be sure to follow the steps for your server.

To install a KANA Response Live Server:

1. Log on to the machine with an account with root/super user privileges. For example, root account.
2. Make sure that any existing KANA folders are removed from the machine. See the "Uninstalling" section for more information about how to delete a KANA folder.
3. Create a database instance for use by KANA Response Live Server by following the procedure described in "Chapter 2: Creating the Database Instance."
4. Download the KANA Response Live Server software from the FTP site.
5. Use the command prompt and cd to where you downloaded the KANA Response Live Server software from the ftp site.

   cd /home/yourlocation/

6. Use the following command to unzip the tar file:

   For Linux:

   Type the following command in the command prompt:

   ```
   tar -xvf <filename>
   ```

   You will see the following files:

   ```
   Cona_linux.tar
   pkginst
   postinstall_k
   preremove_k
   request_linux
   ```

1. Install an SSL Certificate.

   Generating a valid SSL certificate takes about 10 minutes. Although the SSL certificate installation and key generation is completed, it typically takes two to four days to have the certificate signed by Verisign. Refer to the Solaris documentation or contact Verisign for complete instructions on obtaining and installing an SSL certificate.

2. At the command prompt, go to the location of the installation package.
3. Install the KANA Response Live Server components from the download directory by adding the installation file as a package. See Figure 3-1.

Figure 3-1 Install KANA Response Live Package

```
root@plato:/tmp > pkgadd -d V3-5A-SPARC_TOMCAT.bin

The following packages are available:
  1  HIPBCona     Cona_sparc
                  (sparc) V3-5A

Select package(s) you wish to process (or 'all' to process
all packages). (default: all) [?,??,q]:

Processing package instance <HIPBCona> from </tmp/V3-5A-SPARC_TOMCAT.bin

Cona_sparc
(sparc) V3-5A
```

For Linux

At the command line, type:

```
./pkginst add
```

4 A message requesting the fully qualified domain name (FQDN) of the server to which you are installing appears. See Figure 3-2. In this figure PLATO is the KANA Response Live Server's name. The name defaults to the name of the server on which you are installing KANA Response Live.

Specify the FQDN in three fields as Figure 3-2. The FQDN may be an IP address.

5 Press Enter to accept the default server name.

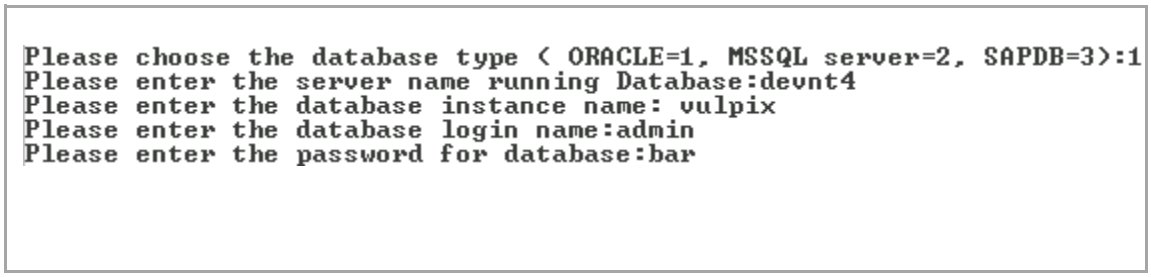
6 A message appears asking where you want to install. Press Enter to select the default location /usr/local/kana. You cannot install in any other directory, as this path name is hard-coded.

A message appears asking for the packages to install. Press Enter to select the default all option and start the installation process. See Figure 11-1. The installer creates the KANA Response Live files and copies them to the KANA Response Live installationdirectory /usr/local/kana.

Figure 3-2 Specify FQDN of KANA Response Live Server

```
Please enter the FQDN [plato.hipbone.com]:
```

Figure 3-3 Specify the KANA Response Live Database



7 A prompt appears requesting the name of the instance of the KANA Response Live database. Type in the Database instance name and press **Enter**. See Figure 3-3.

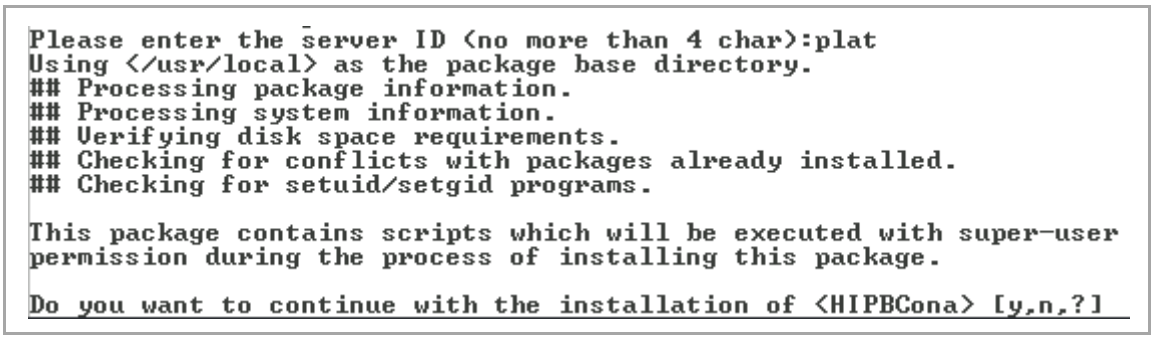
8 A prompt appears requesting the user logon name for the KANA Response Live database. Type in the DB User/Schema name and press **Enter**. See Figure 3-3.

9 A prompt appears requesting the user logon password for the KANA Response Live database. Type in the DB User/Schema password and press **Enter**. See Figure 3-3.

At the prompt for the server ID, type the name to use for this KANA Response Live Server. See Figure 3-4. This server ID must be no more than four characters and must not already exist in the KANA Response Live database.

In a clustering environment, ensure that the server ID is unique over all nodes in the environment, so that the database can easily identify which node the server belongs to.

Figure 3-4 Specify the KANA Response Live Server



The installer indicates it needs to execute some scripts as `root`. The KANA Response Live Server package contains scripts which are executed with super-user permission during the installation process.

10 Type **`y`** to the prompt asking if you want to continue with the installation and press **Enter**. See Figure 3-4.

The installer then installs the KANA Response Live files into the `/usr/local/`kana directory. You cannot change this location. When the installer finishes, the following message appears:

Figure 3-5 KANA Response Live Server Installation Successful

1 Now that the database instance has been created, and KANA Response Live has been successfully installed, a separate command line installer must be run to seed the database. To run the command line installer, make sure you are logged in as `root` user, and type the following command at the prompt from the installation directory (`/usr/local/kana/hbroot/bin`) and press **Enter**. See Figure 3-6.

```
./clinstaller.sh
```

Figure 3-6 KANA Response Live Server Database Seeding

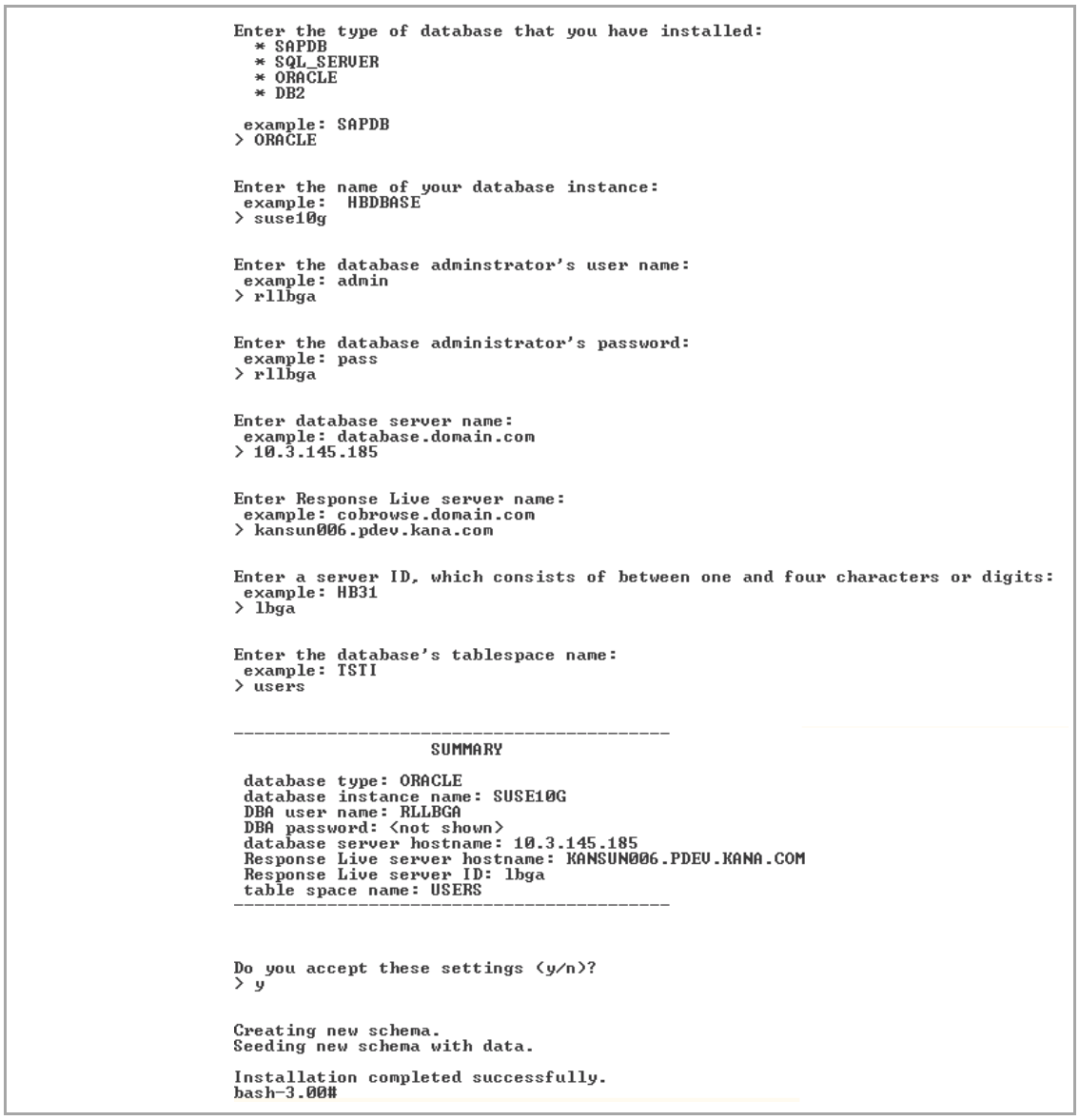
```
bash-3.00# cd /usr/local/kana/hbroot/bin
bash-3.00# ls -l
total 20
-rwxrwxrwx   1 bin      bin           382 Apr  4 08:47 clinstaller.sh
-rwxrwxrwx   1 bin      bin           422 Apr  4 08:47 encpasswd.sh
-rwxrwxrwx   1 bin      bin          1103 Apr  4 08:47 hipregistry.sh
-rwxrwxrwx   1 bin      bin          1273 Apr  4 08:47 queuecontainer.sh
-rwxrwxrwx   1 bin      bin          1103 Apr  4 08:47 queuemgrd.sh
-rwxrwxrwx   1 bin      bin          1095 Apr  4 08:47 routerd.sh
bash-3.00# ./clinstaller.sh


This schema creation and seed script assumes you have already properly
installed a supported database server, have created a database instance,
and that the database server is up and running.  If you have not already
created a database instance, you will need to do so before you can run
this script.

The information you will need when running this script include:
 * type of database you have installed (SAPDB, SQL_SERVER, DB2 or ORACLE)
 * name of the database instance
 * tablespace name (Oracle only)
 * hostname of the database server
 * hostname of the Response Live server
 * database administrator's user name
 * database administrator's password
 * a unique server ID that will identify your new Response Live server


Enter the type of database that you have installed:
  * SAPDB
  * SQL_SERVER
  * ORACLE
  * DB2
```

2 You will be prompted to enter the same information the installer required (the name of the database server, name of the database instance, logon name and password for the database, and the server ID you previously entered during the KANA Response Live installation). In the case of Oracle alone, you will also be prompted for tablespace

name, which is the value entered during the creation of the Oracle database instance detailed in "Chapter 10: Creating the Database Instance". See the example in Figure 3-7.

Once this information has been entered, the database will be seeded and the KANA Response Live installation is complete. You may now proceed to start the KANA Response Live Server.

Figure 3-7 KANA Response Live Server Database Seeding Example



```
Enter the type of database that you have installed:
  * SAPDB
  * SQL_SERVER
  * ORACLE
  * DB2

 example: SAPDB
> ORACLE


Enter the name of your database instance:
 example:  HBDBASE
> suse10g


Enter the database adminstrator's user name:
 example: admin
> rllbga


Enter the database administrator's password:
 example: pass
> rllbga


Enter database server name:
 example: database.domain.com
> 10.3.145.185


Enter Response Live server name:
 example: cobrowse.domain.com
> kansun006.pdev.kana.com


Enter a server ID, which consists of between one and four characters or digits:
 example: HB31
> lbga


Enter the database's tablespace name:
 example: TSTI
> users


-----------------------------------------
                  SUMMARY

 database type: ORACLE
 database instance name: SUSE10G
 DBA user name: RLLBGA
 DBA password: <not shown>
 database server hostname: 10.3.145.185
 Response Live server hostname: KANSUN006.PDEV.KANA.COM
 Response Live server ID: lbga
 table space name: USERS
-----------------------------------------


Do you accept these settings (y/n)?
> y


Creating new schema.
Seeding new schema with data.

Installation completed successfully.
bash-3.00#
```

3 Start the server by typing the following command in the installation directory (`/usr/local/kana`) as shown in Figure 3-8 and pressing **Enter**:

```
./hipctl start
```

4 After starting the server, check that the KANA Response Live processes are running by typing the following command in the installation directory (`/usr/local/kana`) as shown in Figure 3-8 and pressing **Enter**:

```
ps -a
```

For KANA Response Live installations including chat, there should be five Java processes running. For installations, including cobrowse only, there should be three processes running.

Figure 3-8 Starting the KANA Response Live Server

5 Test the installation. Detailed instructions for testing the installation are in "Chapter 9: Testing the Installation."

Starting & Stopping a KANA Response Live Server

You must start the KANA Response Live Server after installing the software.

To start the server:

1. Log in as `root`.
2. Start the server by typing the following command in the installation directory (`/usr/local/kana`) as shown in Figure 3-8 and pressing **Enter**:

   ```
   ./hipctl start
   ```

3. After starting the server, check that the KANA Response Live processes are running by typing the following command in the installation directory (`/usr/local/kana`) as shown in Figure 3-8 and pressing **Enter**:

   ```
   ps -a
   ```

   For KANA Response Live installations including chat, there should be five Java processes running. For installations, including cobrowse only, there should be three processes running.

Figure 3-9 Starting the KANA Response Live Server

To stop the server:

4. Log in as `root`.
5. In the installation directory (`/usr/local/kana`) type `./hipctl stop`

Enabling Chat, Cobrowse & Proactive Chat

The KANA Response Live chat and cobrowse products are enabled by default in the database, and proactive chat is disabled by default in the database. If the default setting is not correct, you must manually change them using the System Administration tool.

Adding Servers

If you add more KANA Response Live Servers to the installation, the servers you add only have the cobrowse features configured. You should use the System Administration tool to configure Response Live chat features. Refer to the *KANA Response Live Active Clustering Guide* for more information on server configuration for Response Live.

Bypassing the Proxy Server for Local Addresses

To bypass the Proxy server while fetching pages from local addresses, perform the following:

1. Open the hipctl file in /usr/local/kana
2. Uncomment the following line in the file:

   ```
   #NON_PROXY_HOSTS="www.dummy.co.jp|.dummy.com"
   ```

3. For a single host to be proxied from a range of non proxy hosts, uncomment the following line in the hipctl file and mention the proxy host name:

   ```
   #ADDITIONAL_PROXY_HOSTS="sales.dummy.com"
   ```

4. Edit both lines shown above to replace the local host names and local IP address that should bypass the Proxy server.
5. Uncomment the following line in the hipctl file:

   ```
   HTTPCLIENT_OPTIONS="-
   DHTTPClient.nonProxyHosts=$NON_PROXY_HOSTS -
   DHTTPClient.doProxyHosts=$ADDITIONAL_PROXY_HOSTS"
   ```

6. Save the hipctl file.
7. Start the Response Live services.

Uninstalling

To uninstall the KANA Response Live Server software from a machine:

1. Stop all Tomcat, and KANA Response Live Servers. See "Starting & Stopping a KANA Response Live Server" for information on stopping KANA Response Live Servers.
2. To uninstall the KANA Response Live Server, remove the installation package HIPBCona by typing the following command in the /usr/local directory and pressing **Enter**: (See Figure 3-10.)

For Solaris:

Type the following command in the /usr/local directory and press **Enter**:

```
pkgrm HIPBCona
```

This command is applicable for uninstalling Response Live on Solaris.

For Linux:

Type the following command in the /usr/local directory and press **Enter**:

```
./pkginst remove
```

This command is applicable for uninstalling Response Live on Linux.

Figure 3-10 Uninstalling KANA Response Live Server

```
root@plato:/usr/local > pkgrm HIPBCona

The following package is currently installed:
   HIPBCona         Cona_sparc
                    (sparc) V3-5

Do you want to remove this package? y

## Removing installed package instance <HIPBCona>

This package contains scripts which will be executed with super-user
permission during the process of removing this package.

Do you want to continue with the removal of this package [y,n,?,q] y
```

3 Once the HIPBCona package has been removed, remove the KANA directory by typing the following command in the /usr/local directory and pressing **Enter**: (See Figure 3-11.)

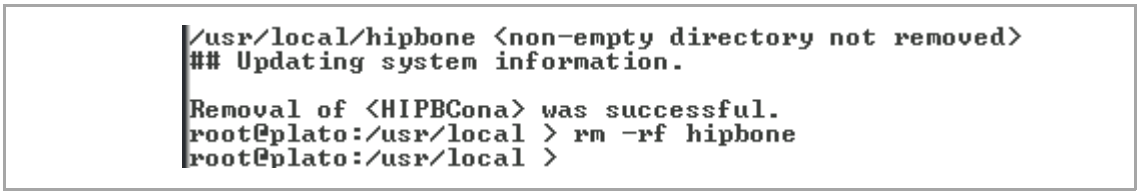
For Solaris:

```
rm -rf kana
```

For Linux:

The rm -rf kana command is not required when installing Response Live on Linux.

Figure 3-11 Removing the KANA Directory



Chapter

4

KANA Response Live Server Troubleshooting Tips

Problem	Changes to **config.properties** are not being retained.
Possible Causes	Changes do not take effect until you restart the affected servers.
Fixes	Restart the system that is running the KANA Response Live Server. Instructions on restarting are in this guide.
Possible Causes	When cobrowsing, certain images that are visible in a normal browser appear broken.
Possible Causes	The Web Server supplying the images is trying to authenticate the web browser before returning the image either by using a cookie or by using HTTP authentication. Web servers often do this for images containing sensitive information, such as a graph of financial information. An image will not load if the user does not have the appropriate cookie for that image.
Fixes	Activate image funneling.

Problem Push Chat does not work.

Possible Causes A jgroups exception is thrown in the Tomcat logs when a customer is available for Push Chat.

org.jgroups.ChannelException: unable to setup the protocol stack at
org.jgroups.JChannel.init(JChannel.java:1273)
at org.jgroups.JChannel.<init>(JChannel.java:265)

Fixes The workaround is to change the jg-tcp.xml located in hbroot/conf

To do this:
Change
max_bundle_size="64000"
To
max_bundle_size="8000"

This should make it work in all platforms as well.

While troubleshooting, the Response Live log files need to be checked to ascertain if there are any specific information relating to misconfiguration.

Chapter

5

Preparing to Install the KANA Response Live Server on Windows

Who Should Read this Section?

This section is intended for system administrators who are responsible for installing KANA Response Live software on Windows.

It may also be helpful to read the *KANA Response Live Getting Started Guide*.

Once the system requirements are met as described in "Chapter 2: Preparing for the Windows Installation," you can install a KANA Response Live server. To install the KANA Response Live server:

1. Create a KANA Response Live database instance. See Chapter 6, "Creating the SQL Server Database Instance."
2. Install an SSL Certificate.
   Generating a valid SSL certificate can be completed, on average, within 5 – 10 minutes. Although SSL certificate installation and key generation can be completed in 5 – 10 minutes, it typically takes 2 – 4 days to have the certificate signed by a company such as Verisign. You can obtain the certificate from your preferred company. Refer to your

Operating System or IIS documentation for complete instructions on obtaining an SSL certificate and installing it.

3. Install the KANA Response Live server software. See Chapter 7, "Installing the KANA Response Live Server on Windows." The installation also creates the database schema and populates the database with some default data values useful for testing. The KANA Response Live server installation package can be installed from the web as an FTP download.
4. Only perform the next few steps if you are using DB2 on Windows:
   a. Run dbgen.exe. You must run dbgen.exe prior to installing Response Live when you are planning to use DB2.
   b. Additional requirements for DB2 are that you run the SQLLIB\java12\usejdbc20.bat file before installing Response Live, and that the SQLLIB\bin\db2jsrt.exe process is running at all times.
5. Test the installation using the default start page, organization, and iChannel provided by the KANA Response Live installation.

Preparing for the Windows Installation

- Make sure the system on which you are going to install the KANA Response Live server software meets the hardware and software requirements in this chapter.
- Have administrator privileges on the system.
- Make sure the system has a fully configured DNS. The server must be using an active and accurate DNS server to resolve addresses. The server must also be registered with DNS so that client computers can find the server. If you plan to run client web browsers connected over the Internet, this requirement might involve changing your firewall or proxy configurations.
- Have an understanding of SSL certificates

Hardware Requirements

Table 1 lists the minimum hardware requirements for the system on which the KANA Response Live server software is to be installed.

Table 1 Hardware Requirements

	Minimum Requirement
Processor	2 GHZ bus or higher
RAM	2 GB
Disk space	1 GB free space on the installation drive
Swap space	1 GB

Hardware Requirement for the Agent Browser

Table 2 lists the minimum and recommended hardware requirements for the system on which the KANA Response Live agent browser is to be installed, for Windows, Solaris and AIX.

Table 2 Hardware Requirements

	Minimum
Processor	Dual 1 GHz
RAM	1 GB
Disk Space	128 MB free space on the installation drive
Screen Resolution	1024x768 minimum screen resolution for correct presentation.

Software Requirements

Supported Configurations

These are the supported configurations for Response Live.

- Linux/Oracle stack
- Windows/SQL Server stack

Important! KANA Response Live 10 R3 is only certified on Linux and Windows. For help, or to install another version of KANA Response Live, please contact Technical Support.

Table 3 lists the software requirements for the system on which the KANA Response Live server software is to be installed.

Table 3 Software Requirements

Application Server OS	Web Server	Database Type	Database OS	Database Encoding
Windows 2003 R2 SP2 (Enterprise and Standard edition)	IIS 6.0/Tomcat 5.5.9	SQL Server 2005 SP2 (Enterprise edition)	Windows 2003 R2 SP2 (Enterprise and Standard edition)	Unicode

Note: The KANA Response Live Server installation package includes Tomcat and the Java Virtual Machine (JVM).

Other Web Servers and servlet engines should be installed before installing the KANA Response Live software.

Database Requirements

Table 3 lists the database requirements for the KANA Response Live Server software installation. The KANA Response Live Server installation programs require that a database server be installed and running with a KANA Response Live database instance created.

KANA Response Live Server comes with a program that automates the database instance creation for SQL Server. The installation program does not automatically create an instance of an Oracle database.

Installing and Configuring Port Redirectors

To install KANA Response Live when the database is not running on the standard port, a port redirector can be used. The port redirector can be run on the same machine on which the KANA Response Live server is running, or on the database server. The port redirector gets the database requests from the KANA Response Live server and sends these requests to the server:port of the database server.

You can use PortTunnel or Axis which are third party tools based on your setup environment.

When the port redirector is running on same machine on which KANA Response Live will be installed, the following steps apply:

PortTunnel

1. Save and unzip the PortTunnel_ENG.zip.
2. Install using PortTunnel_ENG.msi.
3. Run PortTunnel.
4. Click the **Add** button in the **Main** tab:

   Before installing the KANA Response Live server software:

   In port: Enter to default port of the database you are using. For example, 1433 for MSDB.

   In Bind address: Enter”localhost” as the value.

   Out port: Enter the port number server on which the database is running.

   Out target: Enter the server name where the database is running.

   Out bind port: Enter 'any' as the value.
5. Click **OK**.
6. Start the server. Verify if the status of the server is **Started**.

Axis

1. Save the lib.zip and the runPortRedirector.bat file.
2. Unzip the lib.zip file to a directory.
3. Edit the following line to contain the correct path of the lib directory:

   ```
   set AXIS_LIB=f:software\Axis\lib
   ```
4. Run the batch file.
5. In the UI, perform the following:

Set listen port to default port of the database you are using. For example, 1433 for MSDB. Target host name: Enter the server name where the database is running.

target port #: Enter the port number of the server on which the database is running.

6 Click **Add**.

Steps to follow during installation of the KANA Response Live server.

During installation, make sure to follow these steps if you are using port redirectors.

1 Specify 'localhost' as the database server name.

2 Complete the installation.

3 Stop the port redirector.

4 Edit the hbroot/conf/config.properties, to replace the 'localhost' to the actual database server name.

5 Verify that the Response Live tables are created and populated in the Database instance.

Perform any other required steps before starting the KANA Response Live server. Refer to Chapter 7, "Installing the KANA Response Live Server on Windows."

Supported Upgrade Paths

The supported Response Live migration paths for a Windows server are:

- Response Live 9.5
- Response Live 10 R1

Before upgrading a KANA Response Live server, make sure your system meets the requirements detailed earlier in this guide.

Upgrade KANA Response Live 9.5 Server to 10 R3

Before upgrading a KANA Response Live server:

1. Make sure your system meets the requirements detailed above.
2. Stop all the servers. For example, stop the Web server (IIS) and the KANA Response Live server. Not stopping the servers is usually the cause of incomplete upgrades. If the servers are running, some KANA Response Live files cannot be upgraded because the files are in use.
3. Make a backup copy of the entire current installation. This is located in the <installationFolder>\KANA folder.
4. Make a backup of the Response Live database.
5. Back up all customization files.
6. Remove the old installation. See "Chapter 5: Installing the KANA Response Live server" for information on uninstalling KANA Response Live server.
7. Install the new KANA Response Live software and point to the existing database.
8. Create a virtual directory in IIS and point to the web folder - <RL Install Folder>\web
9. Update the Response Live database schemas and seed data accordingly:

Schema Changes:

Open *<Kana Installation Dir>\db\<your db type>\SchemaCreation.sql*. For example, for an SQL Server, the filename would be: <RL Install Folder>\db\msdb\SchemaCreation.sql.

CALENDAR

METRIC_SURVEY_RESPONSE

METRIC_ICHANNEL_STATE_CHANGE

METRIC_CHAT_SESSION_DENIED

Execute the SQL in this file against the database. Check all the above tables are available by selecting them.

Seed Data Changes:

The script assumes the IDs in steps a - e have not changed (1 is the default ID for all these components). If the IDs have changed, then you need to find the ID and run an update statement for that ID. A simple select statement on the appropriate table will show the ID of the component.

a TABLE CODEBASE _VERSION (CODEBASE_VERSION_ID,VERSION_LABEL):INSERT INTO CODEBASE_VERSION VALUES (103,'V10.3');

b TABLE QUEUE_CONTAINER:UPDATE QUEUE_CONTAINER SET CODEBASE_VERSION_ID=103 WHERE QUEUE_CONTAINER_ID=1

c TABLE QUEUE_MANAGER:UPDATE QUEUE_MANAGER SET CODEBASE_VERSION_ID=103 WHERE QUEUE_MANAGER_ID=1

d TABLE SERVER_POOL:UPDATE SERVER_POOL SET POOL_CODEBASE_VERSION_ID=103 WHERE SERVER_POOL_ID=1

e TABLE SERVER_DESCRIPTION:UPDATE SERVER_DESCRIPTION SET CODEBASE_VERSION_ID=103 WHERE SERVER_DESCRIPTION_ID=1

10 Report Views should be created manually by running the script from the following location:

a Login to the Response live server.

b In SchemaCreation.sql, from <RL Install Folder>\db\<your database type –Oracle/SQL/DB2>

c Drop the AGENTPRODUCTIVITYVIEW and INTERACTIONVIEW if they exist. You will recreate them in a subsequent step.

d In the case of the SQL Server database, if the database user is not the database owner, make the following change to the InterActionView script: change "dbo.chatTranscriptConcat" to "[user_name].chatTranscriptConcat". This change is not required if the database user is the database owner

e Execute AGENTPRODUCTIVITYVIEW, INTERACTIONVIEW, SYSTEMTRIGGEREDRULEVIEW, ACTIONPERFORMANCEBYAGENTVIEW, AGENTTRIGGEREDACTIONVIEW and

PROACTIVECHATENTRYPAGESVIEW on your Response Live db instance

11. The default value for Service Unavailability needs to be set up for every Organization. In order to do this, execute the following set of statements for each Organization:
    a. INSERT INTO ORGANIZATION_CONFIG_PROP (ORGANIZATION_ID, NAME, VALUE, TIME_MODIFIED) VALUES ('[ORGANIZATION_ID]', 'svc.unavailable.unavailable.msgtype', 'text/html', CURRENT_TIMESTAMP)
    b. INSERT INTO ORGANIZATION_CONFIG_PROP (ORGANIZATION_ID, NAME, VALUE, TIME_MODIFIED) VALUES ('[ORGANIZATION_ID]', 'svc.unavailable.unavailable.msg', 'Chat service is currently unavailable. Please try again later.', CURRENT_TIMESTAMP)
    c. INSERT INTO ORGANIZATION_CONFIG_PROP (ORGANIZATION_ID, NAME, VALUE, TIME_MODIFIED) VALUES ('[ORGANIZATION_ID]', 'bizhours.unavailable.msgtype', 'text/html', CURRENT_TIMESTAMP)
    d. INSERT INTO ORGANIZATION_CONFIG_PROP (ORGANIZATION_ID, NAME, VALUE, TIME_MODIFIED) VALUES ('[ORGANIZATION_ID]', 'bizhours.unavailable.msg', 'You have reached us during non-business hours. Please contact us during regular business hours.', CURRENT_TIMESTAMP)
12. Update the launch code on your Web site.
13. Start the Response Live Server.
14. Update the newly created config.properties file with the changes made to the previous config.properties file.
15. Apply any customization carefully and test the installation.

Important! If you are running a Response Live – Response integration, after performing all the steps and restarting the Response Live Server:

- Go to the properties page of each ichannel and map it to the correct queue.
- Ensure rules are created in Response to route Chats from the iChannel to the correct queues.

For more information, read the "Mapping iChannels to Response Queues" section in The *KANA Response – Response Live Integration Guide* (ResponseLiveIntegrationGuide.pdf).

Upgrade KANA Response Live 10 R1 Server to 10 R3

Before upgrading a KANA Response Live server:

1. Make sure your system meets the requirements detailed above.
2. Stop all the servers. For example, stop the Web server (IIS) and the KANA Response Live server. Not stopping the servers is usually the cause of incomplete upgrades. If the servers are running, some KANA Response Live files cannot be upgraded because the files are in use.
3. Make a backup copy of the entire current installation. This is located in the <installationFolder>\KANA folder.
4. Make a backup of the Response Live database.
5. Back up all customization files.
6. Remove the old installation. See "Chapter 5: Installing the KANA Response Live server" for information on uninstalling KANA Response Live server.
7. Install the new KANA Response Live software and point to the existing database.
8. Update the Response Live database schemas and seed data accordingly:

Seed Data Changes:

The script assumes the IDs in steps a– e have not changed (1 is the default ID for all the components). If the IDs have changed, then you need to find the ID and run an update statement for that ID. A simple select statement on the appropriate table will show the ID of the component.

a. TABLE CODEBASE _VERSION (CODEBASE_VERSION_ID,VERSION_LABEL):
INSERT INTO CODEBASE_VERSION VALUES (103,'V10.3');

b. TABLE QUEUE_CONTAINER:
UPDATE QUEUE_CONTAINER
SETCODEBASE_VERSION_ID=103 WHERE
QUEUE_CONTAINER_ID=1

c. TABLE QUEUE_MANAGER:
UPDATE QUEUE_MANAGER

SET CODEBASE_VERSION_ID=103 WHERE
QUEUE_MANAGER_ID=1

d TABLE SERVER_POOL:
UPDATE SERVER_POOL
SET POOL_CODEBASE_VERSION_ID=103 WHERE
SERVER_POOL_ID=1

e TABLE SERVER_DESCRIPTION:
UPDATE SERVER_DESCRIPTION SET
CODEBASE_VERSION_ID=103 WHERE
SERVER_DESCRIPTION_ID=1

9 Update the newly created config.properties file with the changes made to the previous config.properties file.

10 Apply any customization (including tracker actions related files) carefully.

11 Start the Response Live Server.

12 Test the installation.

Important! If you are running a Response Live – Response integration, after performing all the steps and restarting the Response Live Server:

- Go to the properties page of each iChannel and map it to the correct queue.
- Ensure rules are created in Response to route Chats from the iChannel to the correct queues.

For more information, read the "Mapping iChannels to Response Queues" section in The *KANA Response – Response Live Integration Guide* (ResponseLiveIntegrationGuide.pdf).

Third Party Documentation

The following third party documentation is recommended.

SSL Certificates: Documentation on installing Verisign SSL certificates is available at: http://www.verisign.com/support/site/secure/install.html

Windows 2003 and IIS 6: Refer to your operating system documentation or go to:
http://www.microsoft.com

Chapter

6

Creating the SQL Server Database Instance

You must have one of the required database servers running before installing the KANA Response Live server software.

This chapter describes how to create a SQL Server 2005 SP2 KANA Response Live database instance for an existing database server.

The installation program populates the database instance with default data. See *"Chapter 7: Installing the KANA Response Live Server on Windows."*

Creating the SQL Server Database Instance

The KANA Response Live database generator program creates the database instance for SQL Server database servers. This program creates the schemas and tables.

To create the KANA Response Live database instance:

1. Run the **dbgen.exe** script on the machine on which you wish to create the database instance. **dbgen.exe** is a self-extracting zip file that runs the database instance installer. This file is available in the FTP download of the KANA Response Live server software.
2. When prompted, type in the database type. DB2, SAPDB, and SQL_SERVER are the valid options.
3. When prompted, type in the database name. The name should be alphanumeric and contain no spaces or other punctuation.
4. When prompted, type in the database user account name. The name should be alphanumeric and contain no spaces or other punctuation.
5. When prompted, type in the password for the database account. The name should be alphanumeric and contain no spaces or other punctuation.
6. After reviewing the settings for correctness, type 'Y" to accept the settings. If you type "N," you are prompted to re-type in the database type, database name, database user name, and database password information.
7. The screen indicates that you should wait while the database is created. The creation of the database can take several minutes.

   After the database is created, the screen message summarizes the information. A summary file is also created that contains the database information. For security reasons, you may wish to remove this summary file from the server to prevent unauthorized access to it.

   In cases where the database instance is created manually,

   First create the database

   Then create the database user as the database owner prior to running the installer.

   You will need the database name, user name, and password again later in the installation process.

Chapter

7

Installing the KANA Response Live Server on Windows

To install from the web, create a folder for the file you need to download. The installation must be performed from the folder in which the installation file was downloaded. Download the install package from KANA's download site. This site is password protected. Obtain the password from your KANA sales representative.

Run the Installation Program

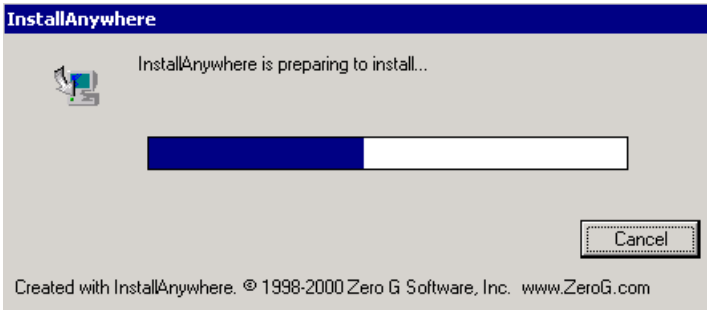
The installation program installs the KANA Response Live software and creates a default organization and iChannel as well as some default database entries and user accounts.

1. Make sure that any existing KANA folders are removed from the machine. See the "Uninstalling" section for more information about how to delete a KANA folder.
2. Download the KANA Response Live server software from the FTP site.

   Double-click the icon labeled ***<version>*_Win_Tomcat_IIS_DB_CHAT.exe** to launch InstallAnywhere, which is the installer for the KANA Response Live server. See Figure 7-1.

   The standard naming convention for Windows installers has been: <version>_Win_Tomcat_IIS_DB_CHAT.exe and the <version> will look like: VX-y-RCn where, X is the major version number, y is the minor version number, n is the release number for the latest version. Since the version numbers are different, for example, 9.0.0 and 9.2.0 the version will look like V9.2.0.x .

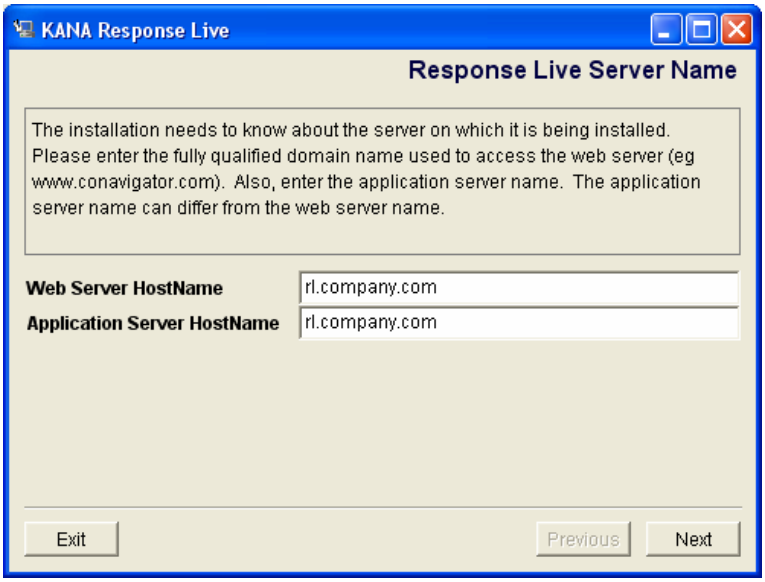
Figure 7-1 InstallAnywhere Screen



3. After InstallAnywhere opens, the first screen you see is the **Response Live Server Name** screen. See Figure 7-2. Verify the information on this screen and click **Next**.

The software automatically enters the correct hostnames. However, this information may need to be changed if using a multichannel server.

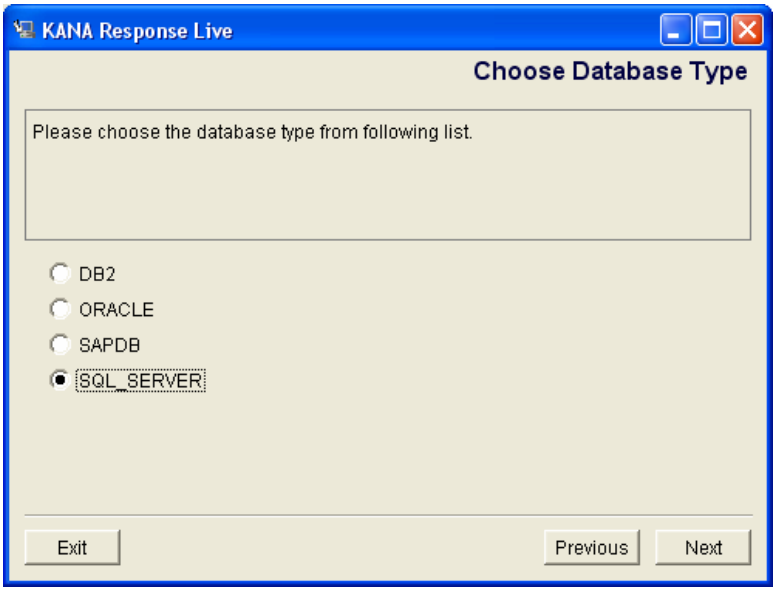
Figure 7-2 Response Live Server Name Screen



You may stop the installation process at any time by clicking **Exit**.

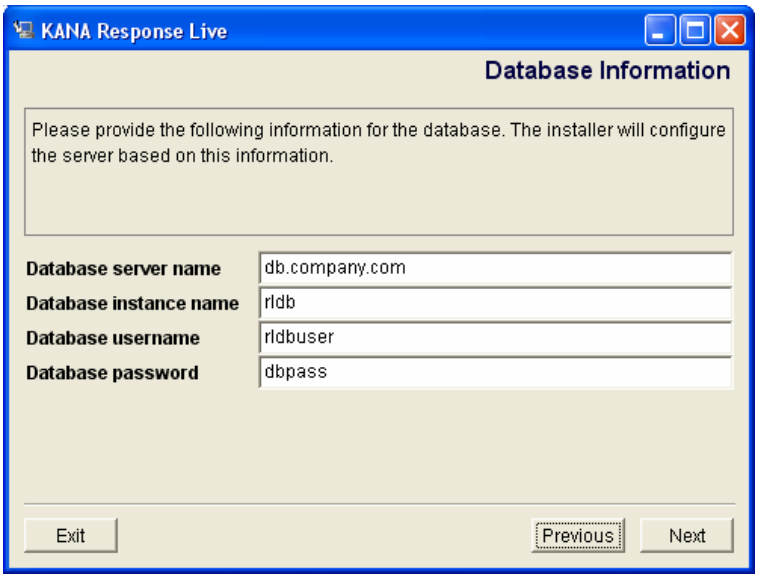
1 The next screen that appears is the **Database Type** screen. Select the database type that your installation will use. Click **Next**. See Figure 7-3.

Figure 7-3 Database Option Screen



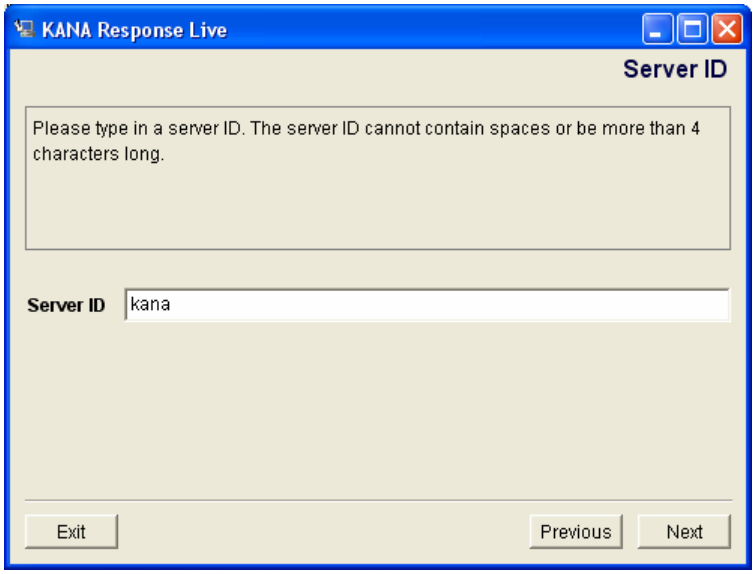
2 The next screen that appears is the **Database Information** screen. Type in the information about the database instance you which to use and click **Next**. The installer will create the schema in this database instance. See Figure 7-4.

Figure 7-4 Database Information Screen



3 The **Server ID** screen appears next. Type in the server ID name and click **Next**. This server ID must be no more than four characters and must not already exist in the KANA Response Live database. See Figure 7-5.

Figure 7-5 Server ID Screen

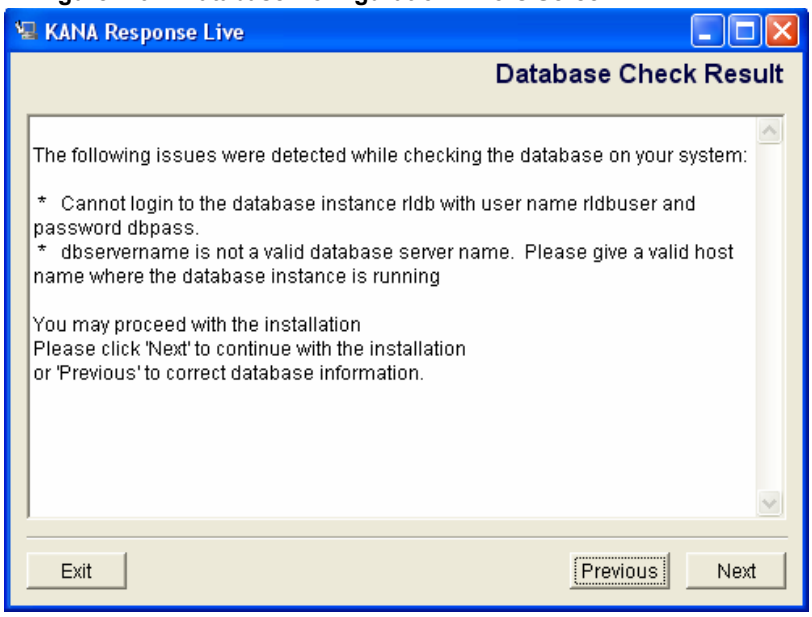


In a clustering environment, ensure that the server ID is unique over all clusters in the environment, so that the database can easily identify which node the server belongs to.

If the database instance is new, you receive a message on the **Database Configuration Errors** screen that says, "Database instance <*databaseName*> on server <*serverName*> does not have the required schema. The installer will create it." Not having the required schema is the most common case. Part of the installers job is to create the schema required by the KANA Response Live software.

If there are errors in either the database information or the server ID, the **Database Check Result** screen also reports these errors. See Figure 7-6.

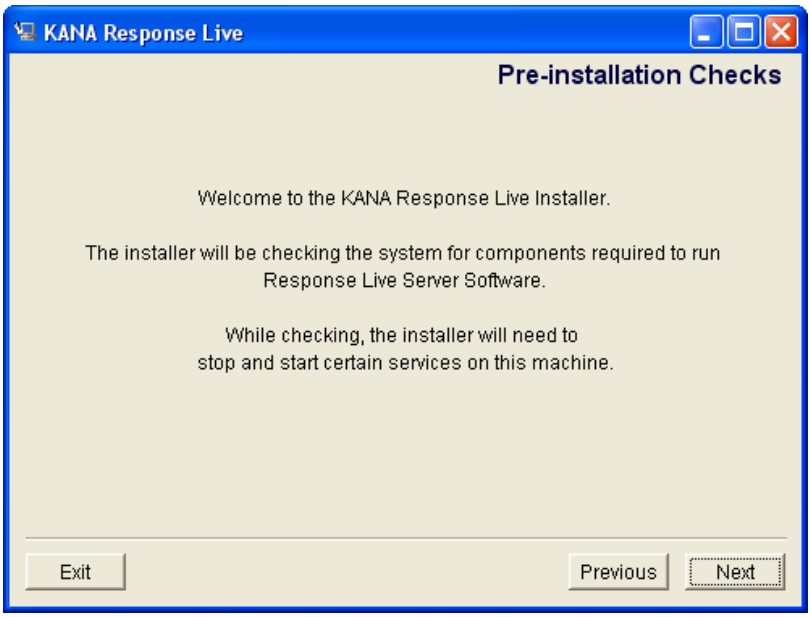
Figure 7-6 Database Configuration Errors Screen



The installer performs a requirements check before the installation begins. See Figure 7-7. This check ensures that the machine meets the necessary software and hardware prerequisites.

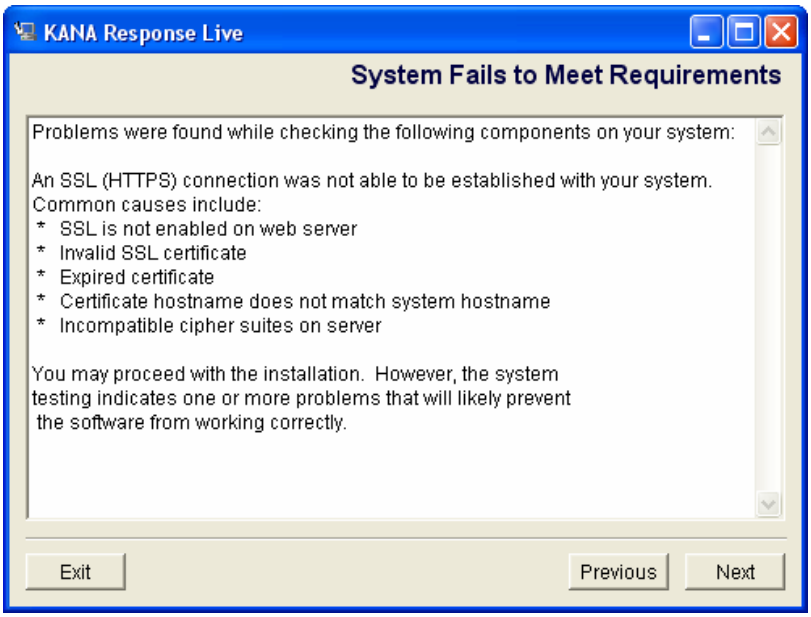
4 Click **Next** to begin the check.

Figure 7-7 Requirements Checking Screen



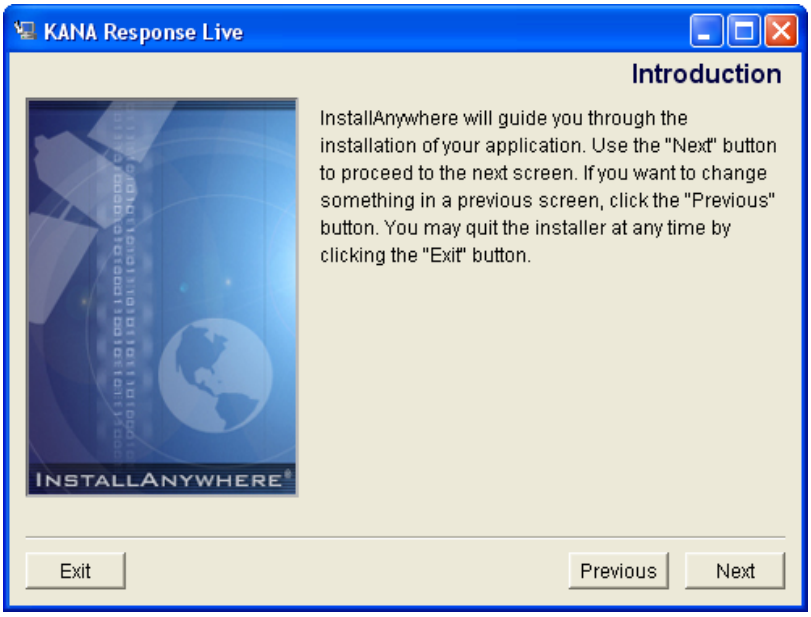
5 If your system does not meet all the installation requirements, you see the **System Fails to Meet Requirements** screen. See Figure 7-8. This screen indicates that nature of the problem. Click **Next** to continue with the installation or **Previous** to go back and correct the problems.

Figure 7-8 System Fails to Meet Requirements Screen



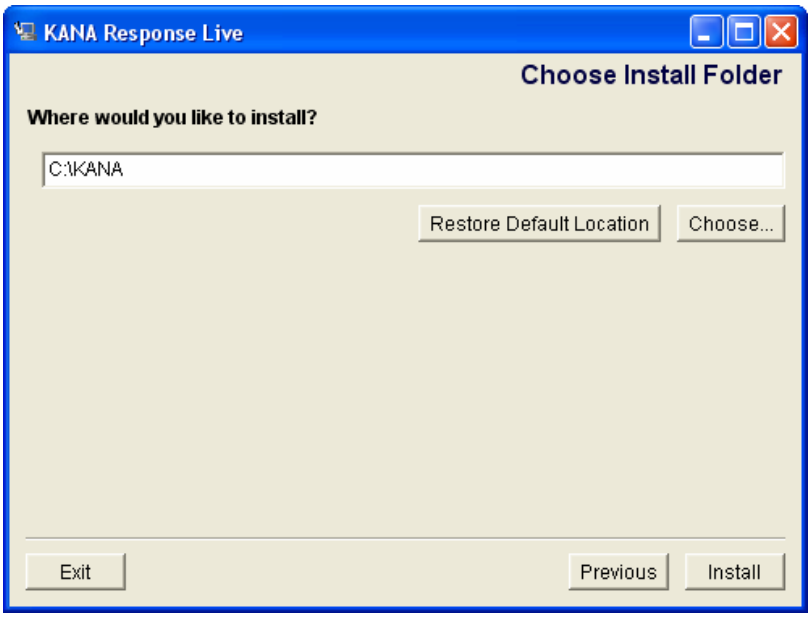
6 The **Introduction** screen appears. Read it and click **Next**. See Figure 7-9.

Figure 7-9 Introduction Screen



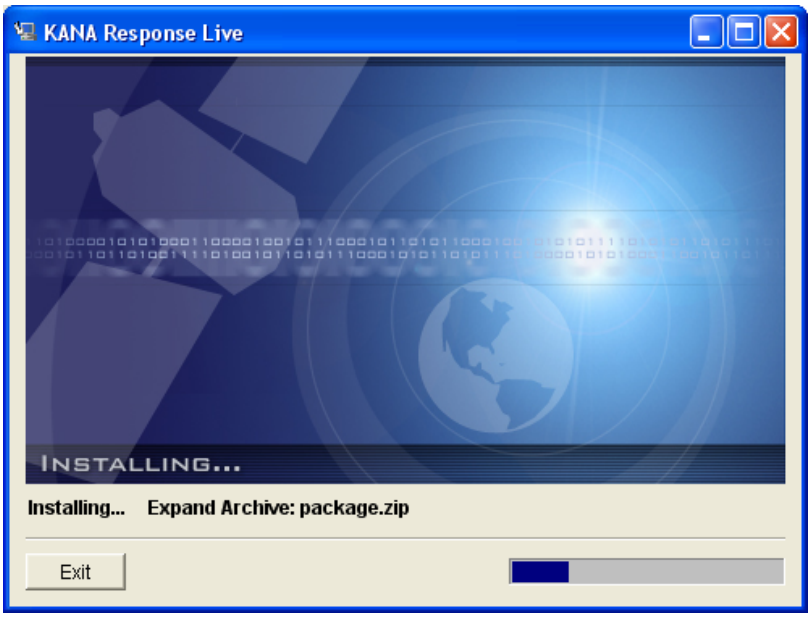
7 The **Choose Install Folder** screen appears. Accept the default location or click **Choose** to select another location using a browse dialog box. Click **Install**. See Figure 7-10. Clicking **Restore Default Location** restores the default location of C:\KANA.

Figure 7-10 Choose Install Folder Screen



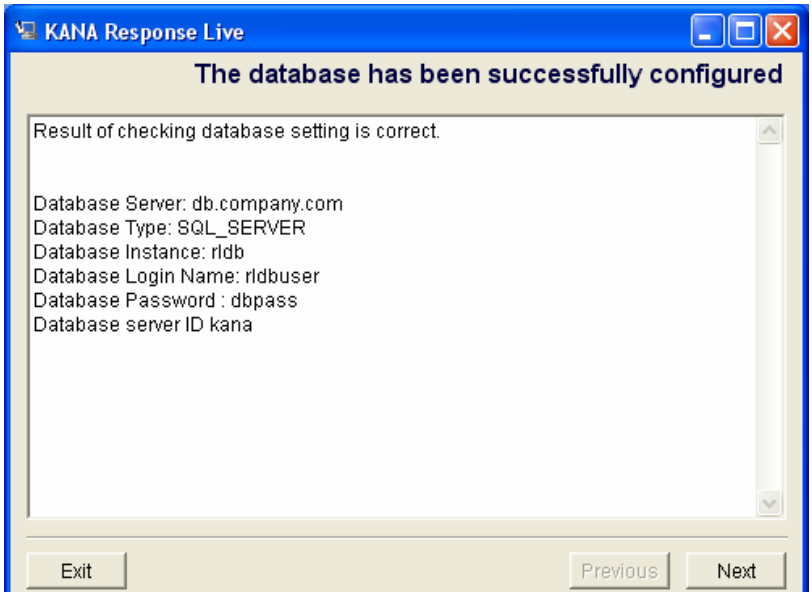
8 The installation now begins. A progress bar indicates the status of the install. It can take several minutes for the installation to complete. See Figure 7-11.

Figure 7-11 Installing Screen



9 If the database configuration is successful, you see the screen shown in Figure 7-12. Click **Next**.

Figure 7-12 Database Configuration Succeeded Screen



If the database configuration is not successful, you see a screen similar to that shown in Figure 7-13. Click **Exit** to exit the installation. You receive a request to verify the cancellation of the installation. See Figure 7-14.

Figure 7-13 Database Configuration Errors Screen

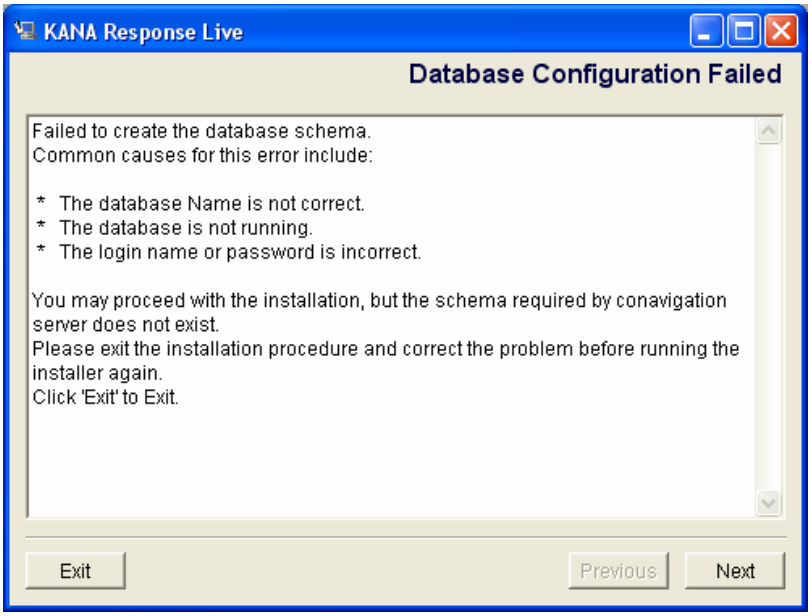
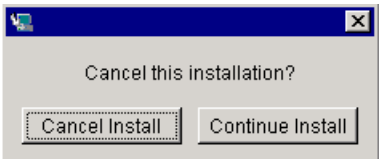


Figure 7-14 Cancel Installation

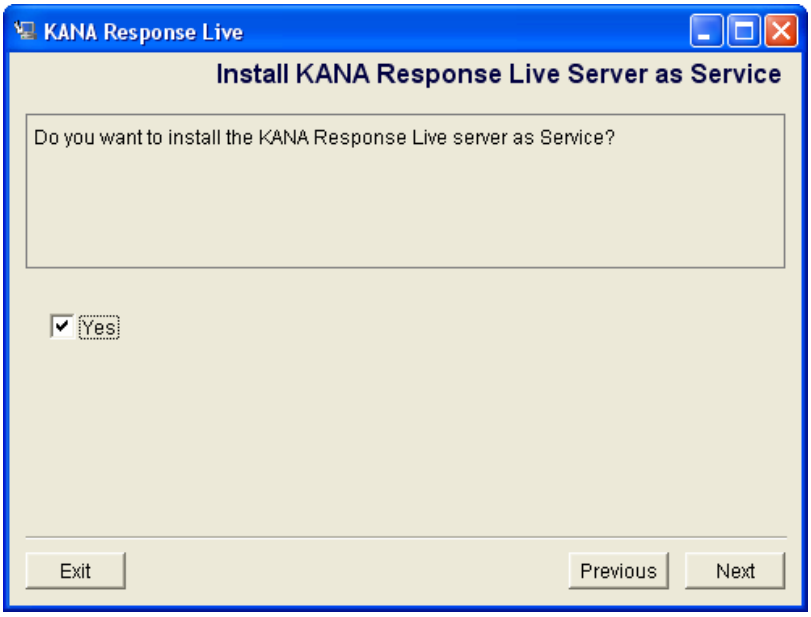


10 The **Install KANA Server as a Service** screen appears next. See Figure 7-15. Select the **Yes** option, then **Next** to install as a service. Otherwise, do not select the **Yes** option and click **Next** to not install as a service.

If installed as a service, you will be given the option later in the installation process of automatically starting the KANA Response Live related processes.

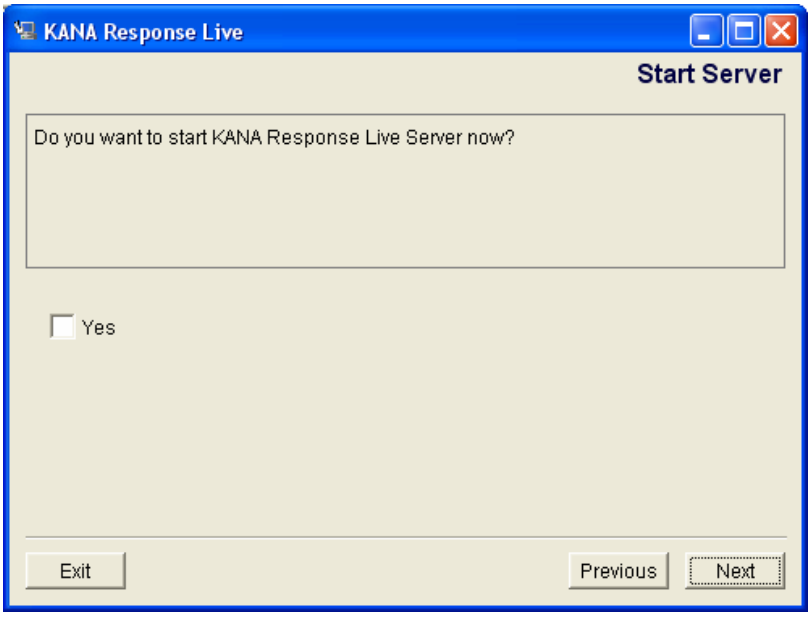
If not installed as a service, the KANA Response Live related processes must be manually started at the end of the installation process and every time the server reboots.

Figure 7-15 Install as Service Screen



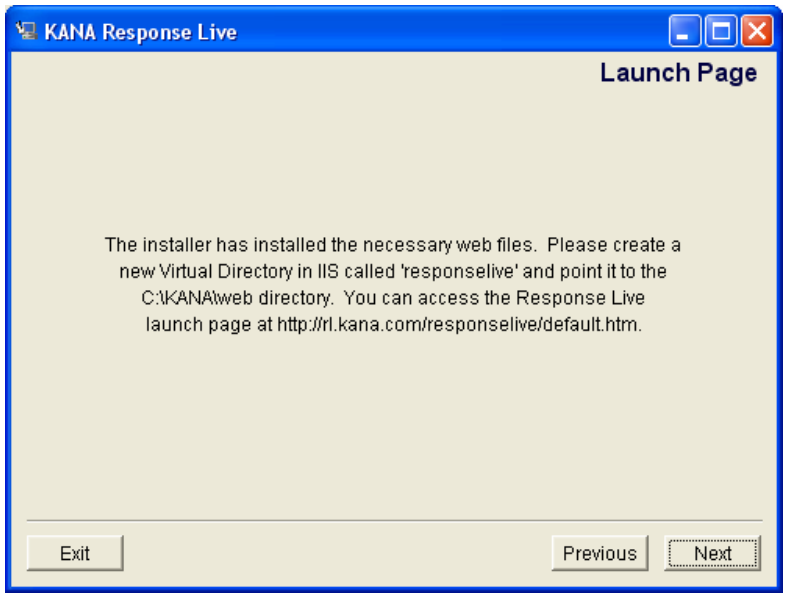
11 If you choose to install as a service, the **Start Server** screen appears next. You can have the installer automatically start the servers or start them manually after the installation completes. Click **Yes**, then **Next** to automatically start the servers. Click **Next** to manually start the servers later. See Figure 7-16.

Figure 7-16 Start Server Screen



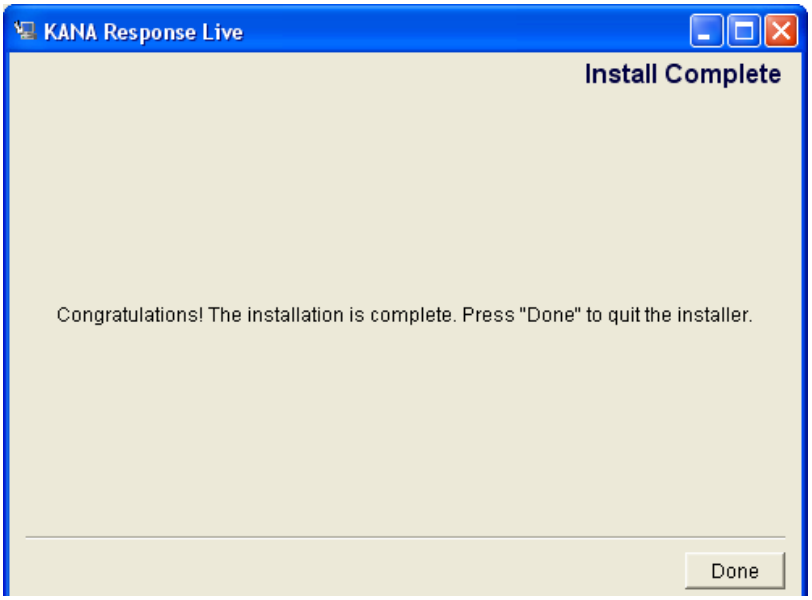
12 The installation process creates a sample test page. A **Launch Page** screen appears. Copy the files named on the screen to your Web Server's home directory to test your installation.

Figure 7-17 Launch Page Screen



13 The final screen is the **Install Complete Screen**. It will tell you that the installation is complete. Click **Done** to quit the installer.

Figure 7-18 Install Complete Screen



Creating the Virtual Directory

After installing the KANA Response Live server you must create a new virtual directory in IIS

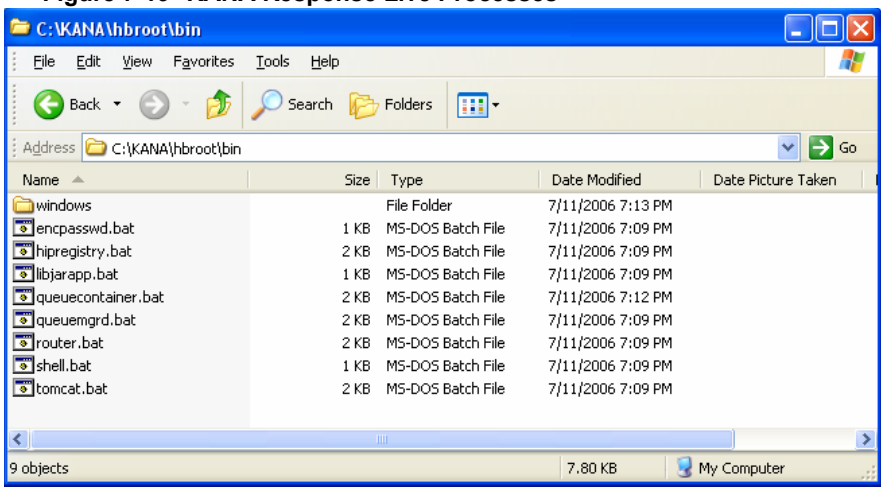
To create the virtual directory:

1. In IIS Manager, create a new virtual directory under Default Web Site.
2. Set the alias to ‘responselive’ and path to <installationFolder>\web (for example, C:\KANA\web).
3. Allow 'Read' and 'Run scripts' permission for this virtual directory.
4. Click Finish.

Starting and Stopping the Servers

After successfully copying the default start page you must stop and restart the servers.

Figure 7-19 KANA Response Live Processes



To start KANA Response Live, if it is not installed as a service:

1. Double-click **hipregistry.bat**. This KANA Response Live service must be started first.
2. If installing the chat software, double-click on the **queuecontainer.bat** file and then the **queuemanager.bat** file. The queue container service must be started before the queue manager service.
3. Double-click router.bat.
4. Launch the Web server.
5. Launch the Tomcat server by double-clicking **tomcat.bat**.

To start KANA Response Live, if it is installed as a Service:

1. Go to start -> **Programs** ->**Administration Tools** -> **Services**.
2. In the Services panel select **KANAResponseLive**.
3. Right click **KANAResponsiveLive**.
4. Click **Start** in the right click menu to start **ResponseLive Services**.
5. To Stop or Restart Response Live as a Service, Click Stop or Restart in the right click menu.

Enabling Chat and Cobrowse

The KANA Response Live chat and cobrowse products are enabled or disabled by default in the database. If the default setting is not correct, you must manually change them using the System Administration tool.

Adding Servers

If you add more KANA Response Live servers to the installation, the servers you add only have the cobrowse features configured. You should use the System Administration tool to configure Response Live chat features. Refer to the *KANA Response Live Active Clustering Guide* for more information on server configuration for Response Live.

Bypassing the Proxy Server for Local Addresses

To bypass the Proxy server while fetching pages from local addresses, perform the following:

1. Open the tomcat.bat file in \KANA\hbroot\bin.
2. Uncomment the following line in the file:

   ```
   rem set NON_PROXY_HOSTS="www.dummy.co.jp|.dummy.com"
   ```

3. For a single host to be proxied from a range of non proxy hosts, uncomment the following line in the tomcat.bat file and mention the proxy host name:

   ```
   rem set ADDITIONAL_PROXY_HOSTS="sales.dummy.com"
   ```

4. Edit both lines shown above to replace the local host names and local IP address that should bypass the Proxy server.
5. Uncomment the following line in the file:

   ```
   rem set HTTPCLIENT_OPTIONS= -
   DHTTPClient.nonProxyHosts=%NON_PROXY_HOSTS% -
   DHTTPClient.doProxyHosts=%ADDITIONAL_PROXY_HOSTS%
   ```

6. Save the tomcat.bat file.
7. Start the Response Live services.

Uninstalling

To uninstall the KANA Response Live server software from a machine:

1. Stop Tomcat, and stop Response Live services.
2. Select the **Control Panel > Administrative Tools > Component Services > IIS Admin Service** option (**Settings** menu).
3. Click **Stop**.
4. Close the **Component Services** window.
5. Run the Add/Remove programs. The text log file is not removed, but all other KANA folders should be empty.
6. Delete KANA folders. The default location of the KANA folders is c:\KANA. If you cannot delete the folders, a user may still be signed into a KANA Response Live product, such as the System Administration tool or the chat product. These programs are still using a KANA Response Live process, so the KANA folders cannot be deleted. In a few minutes, these users will lose the connection to the KANA Response Live processes, and you will be able to delete the KANA folders.

Chapter

8

KANA Response Live Server Troubleshooting Tips

Problem	After changing **config.properties**, the service does not run.
Possible Causes	Permissions on the modified file are not set correctly.
Fixes	Change the permissions on config.properties
Problem	Changes to **config.properties** are not being retained.
Possible Causes	Changes do not take effect until you restart the affected servers.
Fixes	Restart the system that is running the KANA Response Live server. Instructions on restarting are in this guide.
Problem	When cobrowsing, certain images that are visible in a normal browser appear broken.
Possible Causes	The Web Server supplying the images is trying to authenticate the web browser before returning the image either by using a cookie or by using HTTP authentication.

Web servers often do this for images containing sensitive information, such as a graph of financial information. An image will not load if the user does not have the appropriate cookie for that image.

Fixes

Activate image funneling.

While troubleshooting, the Response Live log files need to be checked to ascertain if there is specific information relating to misconfiguration.

Chapter

9

Testing the Installation

Testing an installation before deployment, even for demonstrations and pilot projects, is an integral part of the installation process.

Installing and configuring a server is a complex process with many dependencies on machine and network configuration properties. Most installations are successful, but testing should be done to confirm that the server works properly.

Use the following tests to verify that the KANA Response Live Server is installed and configured correctly. Perform the tests in the order in which they are listed.

Before executing each step, you must stop the servers, restart them, and clear web browsers of all cached content.

Verify the Server Starts

Before attempting to cobrowse, start all of the KANA Response Live components and make sure they can run on the system. To start the server:

1. Start the servers. The servers can be started from the /usr/local/kana. See "Chapter 3: Installing the KANA Response Live Server on Linux"for information on the order to start the servers.
2. Go to <*installationFolder*>/hbroot/logs and review the logs.
3. Make sure the servers are all still running after five minutes.
4. Review the logs again. The logs should be empty.There should be no exceptions or log statements with error messages. See , "Appendix A: KANA Response Live Log files" for more information on the log files.

If the server doesn't start, check:

- The installation log, which lists various problems that may have occurred during the installation.
- For a network configuration error. In this case, the most likely scenario is that the value that was entered for the Web Server hostname or application server hostname in the installer was incorrect.

Verify the Default Database Entries

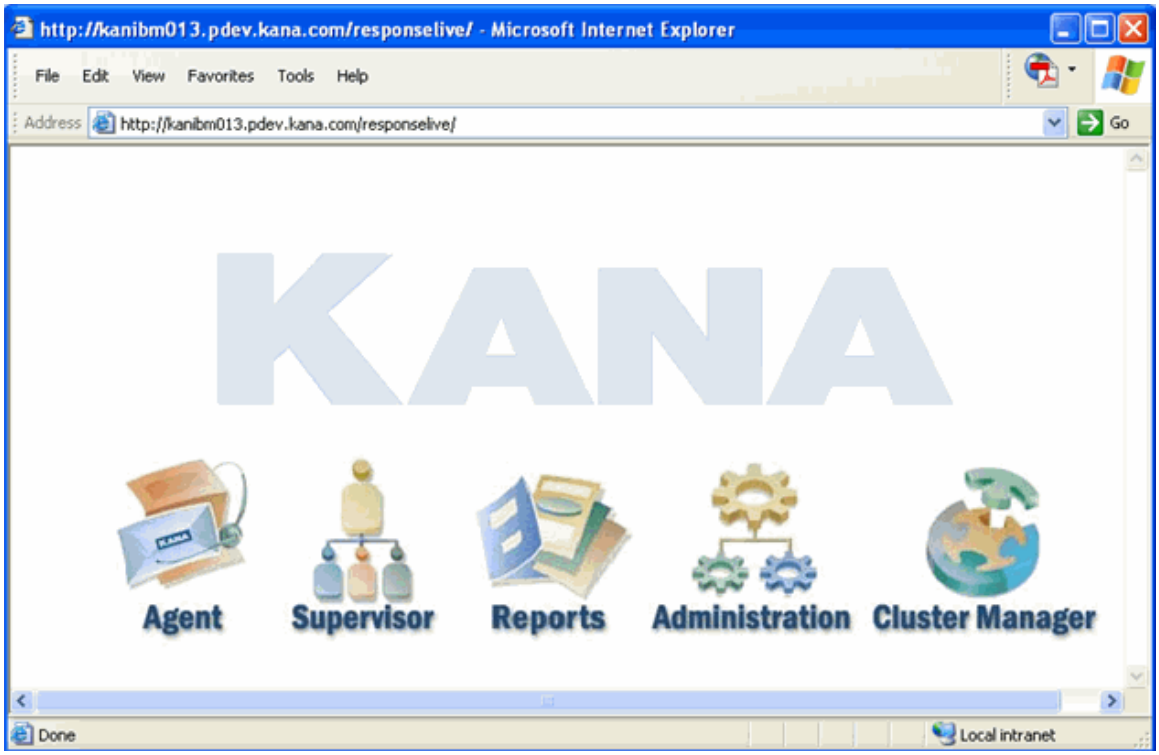
As part of the installation process, the KANA Response Live software creates a set of default database entries and a default launch page. These database entries are only created once for the initial installation. New databases should not be created for additional iSystems added to the KANA Response Live deployment.

The default launch page is the FQDN of the server on which you installed the server. Use this page shown in Figure 9-1 to launch KANA Response Live applications.

To verify that these entries have been created for the initial system installation, open the System Administration tool from the default launch page and look for:

- Only one default organization named “Default” should be present. The system administrator is shown to be in the “SYS” organization. This organization is only used internally by the KANA Response Live software for grouping system administrator accounts.
- Only one system administrators account, which should have user name “Admin” and password “bar.”
- Only one organization administrator account, which should have user name “Orgadmin” and password “bar.”
- Only one iSystem, which should have the name you specified during the installation process, “<*servername*>.”
- If installing the chat product, only one queue manager, which should be named “<*servername*>.”
- If installing the chat product, only one queue container, which should be named “<*servername*>.”
- Only one cluster, which should be named “Default cluster.”

Figure 9-1 Default Launch Page



Click the Administration icon to open the Organization Administration tool. You should see:

- If chat was installed, the option for enabling chat should be already be turned on for the default iChannel created.
- If chat was not installed, the option for enabling chat has not been disabled. If an organization administrator turns this option on, it does not have any effect on the KANA Response Live software operation as the chat software has not been installed.
- One default iChannel in the "Default" organization, which should be called, "Default iChannel."
- One default agent group in the "Default" organization, which should be called "Default."

- One default agent account in the “Default” agent group. This account should have user name “adam” and password “bar.”
- No default supervisor account should have been created.

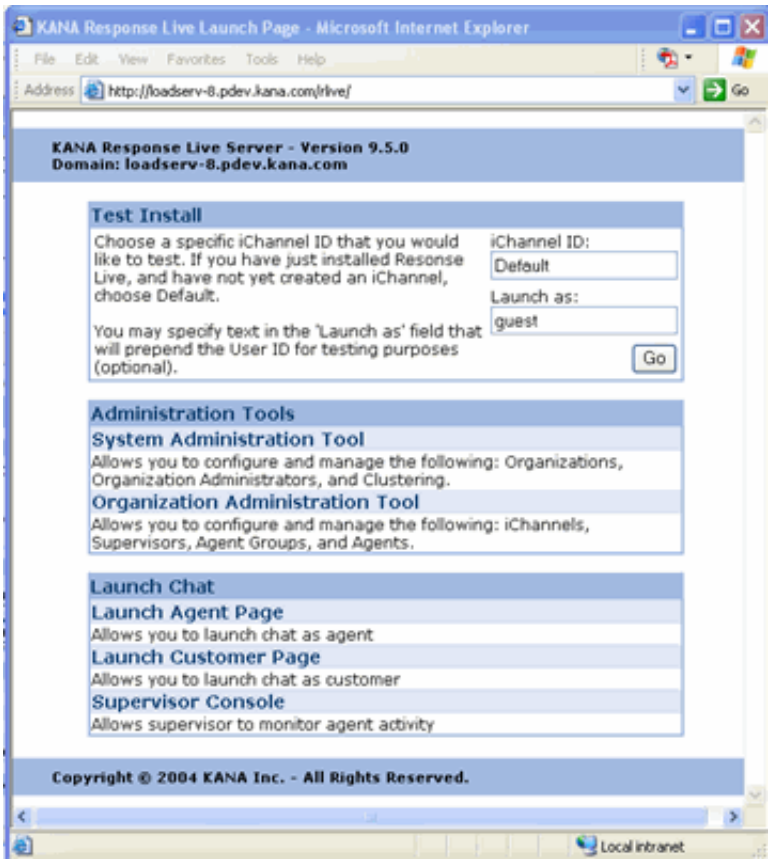
Test Cobrowsing on the Local Area Network

Test the installation using a client running on the same local area network, but not on the server itself. This test can help identify various types of network configuration problems.

To test cobrowsing on the local area network:

1. Stop the servers if they are running.
2. Restart the servers.
3. Clear your web browser of all cached content. This process includes deleting both cached files and cookies. Perform the following steps:
   a. Close all web browsers currently running on the client.
   b. Launch a web browser.
   c. Clear all cached content.
   d. Close the web browser.
   e. Launch a new browser; do not use a browser that is already running.
4. Perform a basic cobrowsing sequence:
   a. Load the http:<servername>/responselive/index.html page. See Figure 9-2.

Figure 9-2 Response Live Index Page

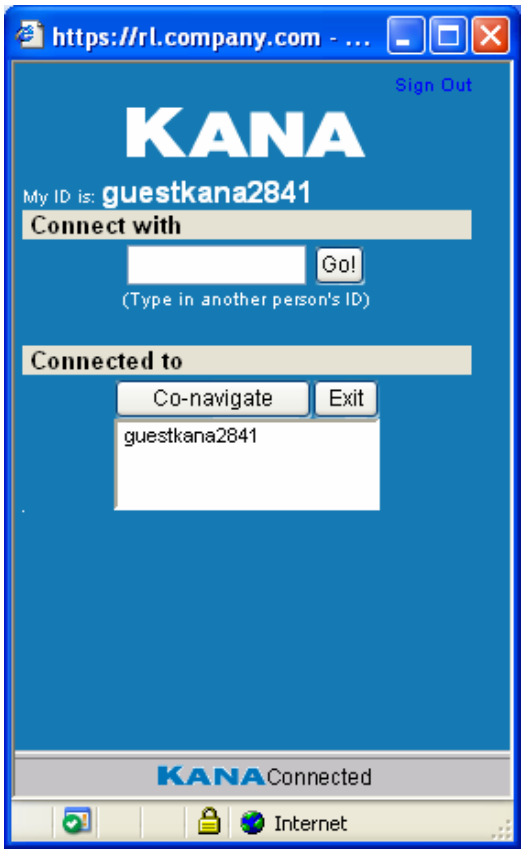


b Log on as a guest user. A control panel similar to the one in Figure 9-3 should appear.

Figure 9-3 Control Panel

c Launch a cobrowse session by clicking **co-navigate**. This action should open a cobrowse window (Figure 9-5) and put a single entry in the control panel, as shown in Figure 9-4.

Figure 9-4 Control Panel with Connection Entry



d Wait 5 minutes to determine if a consistent connection to the server is being maintained.

- To cobrowse your company's web site, type in the URL of your primary site into the location bar at the top of the browser window. Do not type the URL in the Open URL box that appears when you click File > Open or Control-o. This method does not work for cobrowsing.
- To cobrowse a site that is external to the primary site, type in the URLs of various Internet sites into the location bar at the top of the browser window. The goal is to cobrowse web sites that are outside your corporate firewall.

While performing the above test the following are possible problems and their causes that could occur:

- If in Step 4a loading the **index.html** page fails, the client web browser is unable to connect to the server. This problem indicates that other computers, even on the LAN, are unable to resolve the address of the server. The problem is probably caused by a DNS error. Most likely, the address of the server has not been entered into the DNS system.

Figure 9-5 Cobrowse Window

- In step 4b, if logging in as a guest fails, you do not see the control panel shown in Figure 9-3, but either the control panel shown in Figure 9-8 or Figure 9-10. The most likely cause of this problem is an SSL certificate error, which displays an error message in the control panel. See Figure 9-6 or Figure 9-7. This error can be generated because:

- The server is not fully initialized. Wait two minutes and try again. If this logon attempt is successful, proceed to step 4c. A second failure indicates an installation problem.
- An SSL certificate has not been installed.
- An invalid certificate has been installed.
- The web browser is incapable of connecting to the certificate authority (usually Verisign) to verify the SSL certificate.

Figure 9-6 SSL Certificate Error

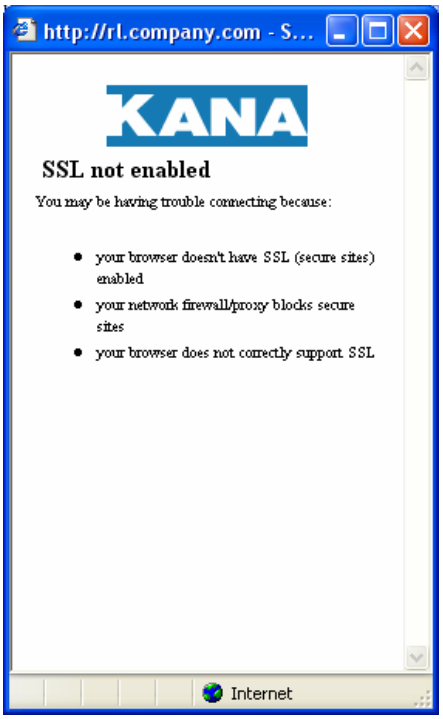
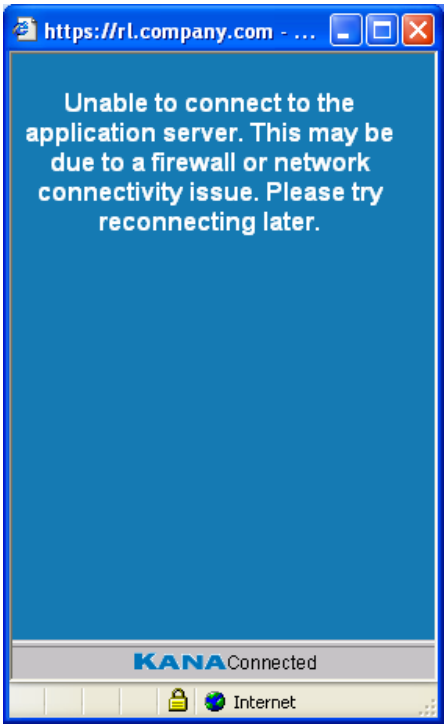


Figure 9-7 Verification Error



- If in Step 4a, a cobrowse session cannot be launched, the cobrowse window opens, but displays an error, such as Page Not Found. This problem usually indicates that the server is not configured correctly. The server is probably using a DNS server which is unable to resolve the default home page.
- If in Step 4d, while waiting 5 minutes, the applet drops the connection to the server, a Server is Down screen appears. If steps Step 4a, Step 4b, and Step 4c succeeded, this step should also succeed. If it doesn't, you may have a configuration problem, such as a firewall blocking the connection.
- In Step 4d, if cobrowsing the primary web site does not work, a Page Not Found error message appears. The most likely cause of this problem is a DNS error. The server is probably using a DNS server that is unable to resolve the default home page.

- In Step 4d, if cobrowsing a site that is external to the primary site does not work, a Page Not Found error message appears. The probable causes of this problem are:
  - A DNS error. The server is most likely using a DNS server that is unable to resolve the addresses of sites on the Internet.
  - The KANA Response Live Server is a using proxy server to access web sites on the Internet. The proxy server could be blocking access to certain web sites.
  - A corporate firewall may be blocking web traffic.

Test Cobrowsing on the Internet

Testing cobrowsing on the Internet is the final server installation testing. This test determines if the server works with clients running on an arbitrary machine on the Internet can connect and cobrowse using the server. As such, it tests DNS and whether any firewalls or proxy servers between the server and the Internet are correctly configured.

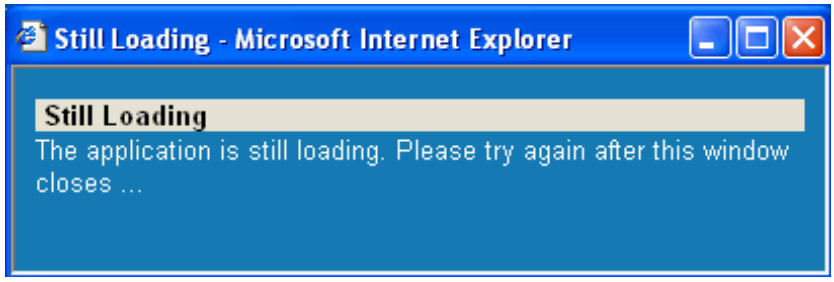
To test cobrowsing on the Internet:

1. Stop the KANA Response Live servers if they are running.
2. Restart the KANA Response Live servers.
3. On the client, launch a web browser, clear its cached content, and close it.
4. Open a new browser; do not use a browser that is already running
5. Perform a basic cobrowsing sequence (steps 4b – 4d). You do not need to perform steps under 4d. If these steps go well, you see control panels similar to the ones described already.
6. Outlined below are the causes of possible failures during this test.
7. If in step 4a loading the **index.html** page fails, the client web browser is unable to connect to the server. This problem indicates that computers outside the LAN are unable to resolve the address of the server. It is probably caused by a DNS error. The address of the server may not have been entered into the DNS system, or the server is behind a firewall.
8. In step 4b, if logging on as a guest fails, your co-navigate button is disabled, and you will not be able to type in the panel below this button, as shown in Figure 9-8. This error is accompanied by another

message as shown in Figure 9-10. This step most commonly fails because the applet will not load.

Figure 9-8 Control Panel with Gray Panel

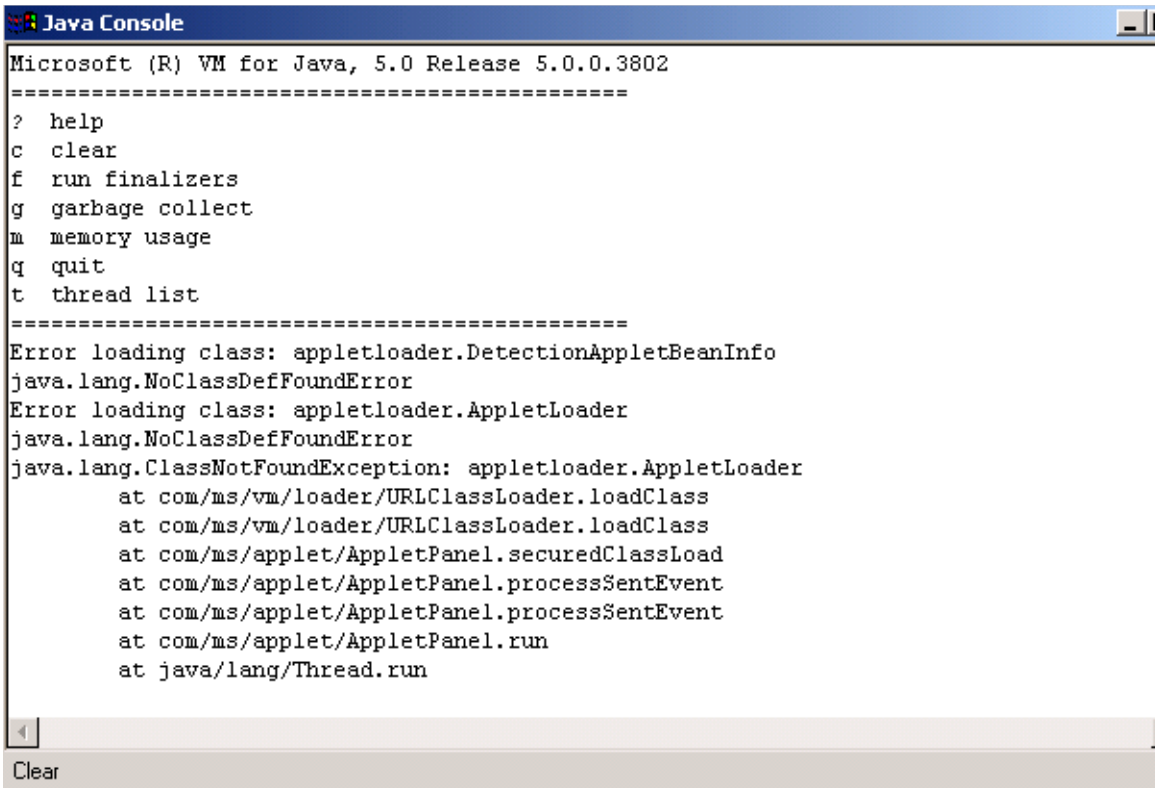
Figure 9-9 Control Panel with Gray Panel



- This problem indicates that a firewall or proxy server is blocking Java applets on the browser side.
- This problem can also result from invalid SSL certificates. In this case, the control panel displays an SSL not enabled message or a browser-specific dialog box appears.
- Alternatively, the browser may be unable to validate the SSL certificate.

This error is also accompanied by an exception in the web browser's Java console as shown in Figure 9-10. This step most commonly fails because the applet will not load.

Figure 9-10 Java Console Exception



- If in step 4c, a cobrowse session cannot be launched, the cobrowse window opens, but displays an error, such as Page Not Found. If steps 4a and 4b succeeded, this step should also succeed. If you have a problem, contact KANA.

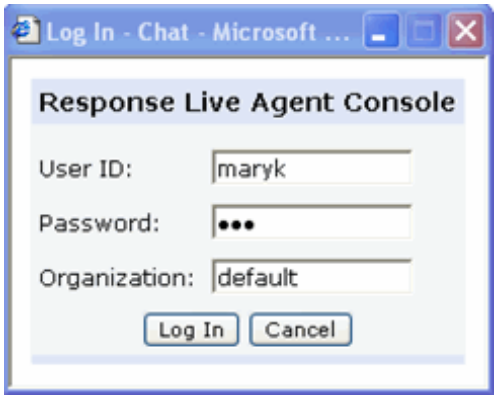
- In step 4d, while waiting 5 minutes, the most common problem is that after two or three minutes, the control panel indicates you have been logged out. This problem should not happen unless a firewall is blocking https requests. This problem only occurs when external clients are involved. In this case, the control panel probably displays the error message shown in Figure 9-11.

Figure 9-11 Could Not Connect Message

Test Agent Console

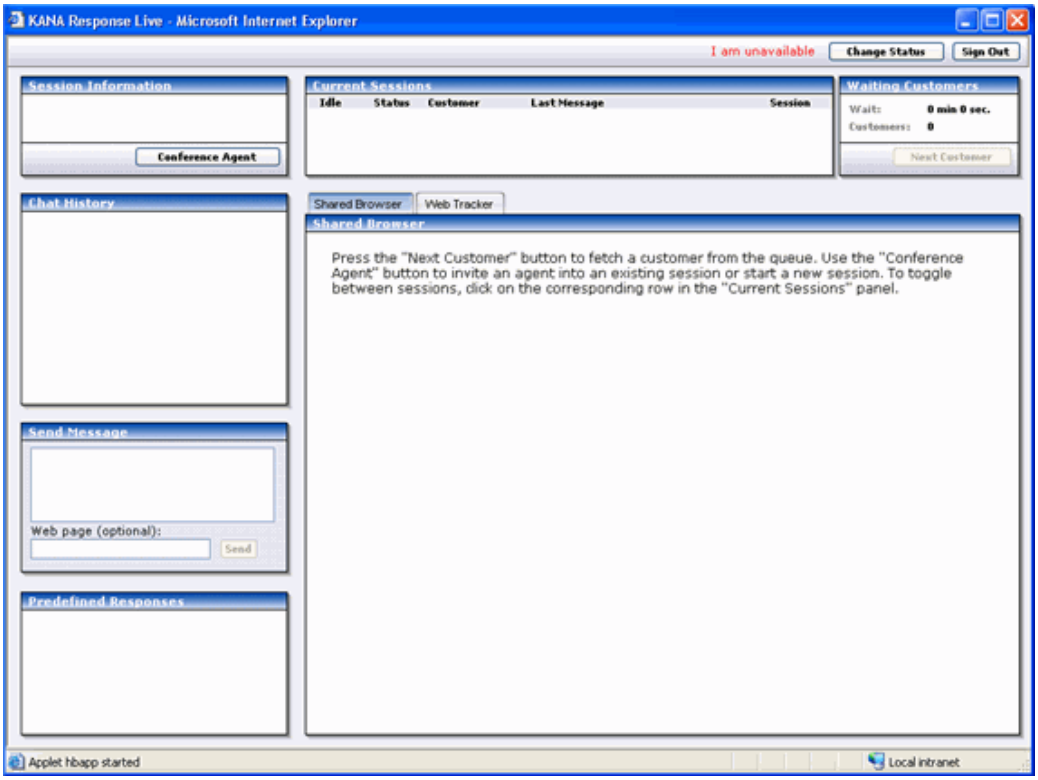
1. Stop the servers if they are running.
2. Restart the servers.
3. On a Client machine, launch a new browser; do not use a browser that is already running.
4. Load the http:<servername>/responselive/default.htm page. See Figure 9-1.
5. Click on Agent icon. You will be prompted to logon. See Figure 9-12. Type adam in the User ID field, bar in the Password field and default in the Organization field. Note that all these values are case-sensitive. Click the Log In button.

Figure 9-12 Login Panel



6. The Agent Console window will be loaded. See Figure 9-13. You will see 0 (zero) in the Waiting Customers section, which means the Agent has started to monitor the Default iChannel queue. Agents can manually set their availability status for pushed chats by clicking Change Status.
7. If you see N/A instead of 0 (zero) in the Waiting Customers section, it means there is no iChannel available. This is caused by not starting all the servers. Make sure to restart all the servers before testing again.You can check hbroot/logs directory for error messages.

Figure 9-13 Agent Console



Test Customer Chat and Cobrowse

1. On a separate Client machine, launch a new browser; do not use a browser that is already running.
2. Load the http:<servername>/responselive/index.html page. See Figure 9-2.
3. Click the Launch Customer Page link. The Chat console will be loaded as shown in Figure 9-14. Type First Name and a Question on the Chat
4. Console and click Submit button. You will be shown a Wait Page as shown in Figure 9-15.

Figure 9-14 Customer Chat Window

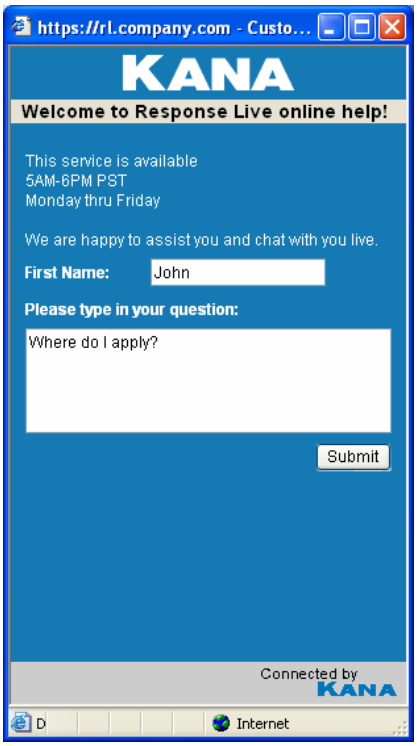
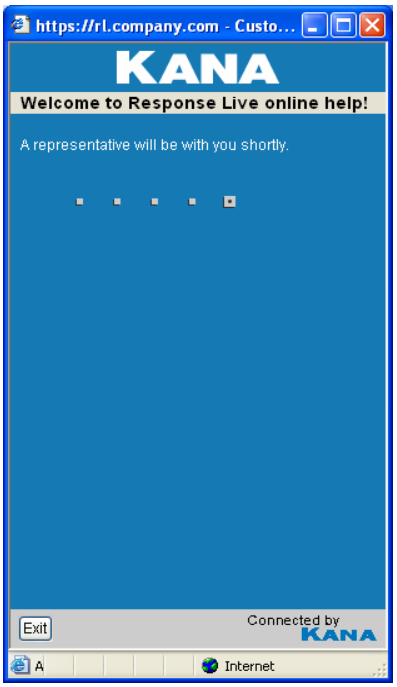
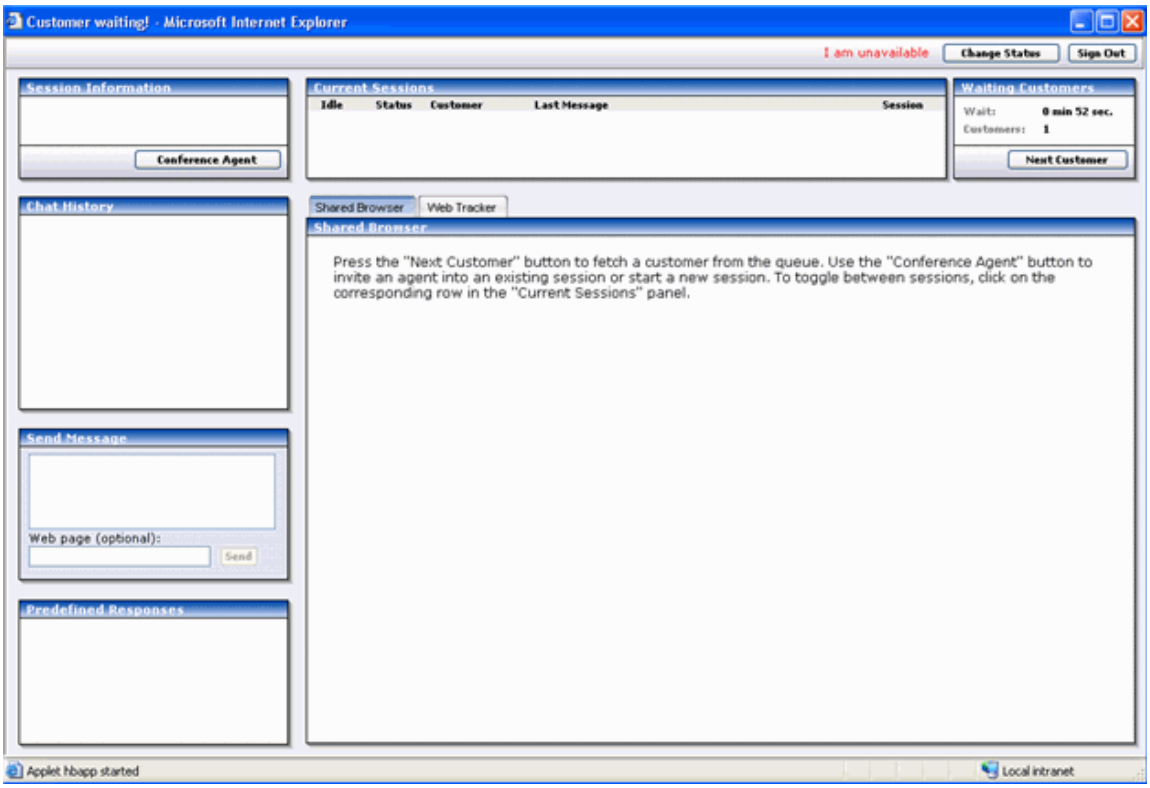


Figure 9-15 Wait page



5 On the Agent Console, you will see **1** in the Waiting Customers section along with the amount of time the Customer is waiting in the queue.

Figure 9-16 Agent Console

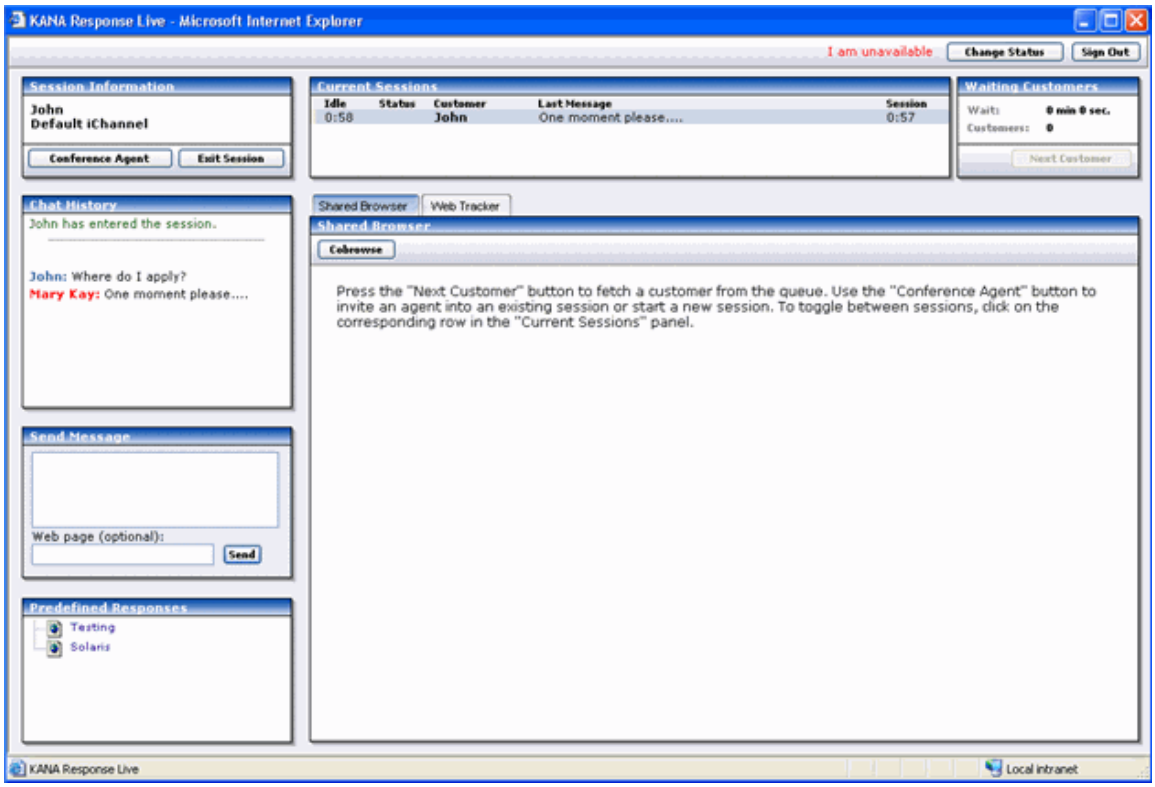


6 Click the Next Customer button. If the agent is pull-enabled, the agent will be connected to the next customer in the queue and a Chat session will be established. The agent will see the Customer question in the Chat History section. See Figure 9-17.

If the Customer browser is IE and is cobrowse compatible, the Cobrowse button will be shown on the Shared Browser section of the Agent Console. See Figure 9-17. Otherwise, in its place, a message will be displayed indicating why Cobrowse is not allowed for this session.

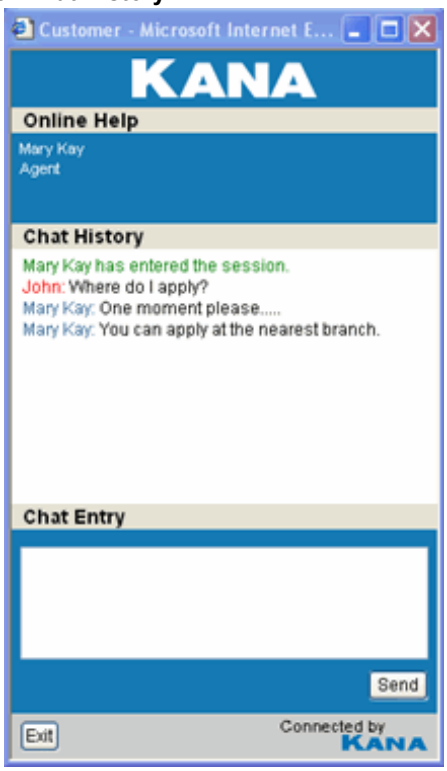
Type something in Send Message section and click the Send button to send it to customer.

Figure 9-17 Agent Console



7 The customer will see the text in the Chat History section of Chat Console window. See Figure 9-18. Test sending a few chat messages from customer to agent and vice versa.

Figure 9-18 Chat History



8 On Agent Console Shared Browser, click the Cobrowse button (See Figure 9-17) to start the cobrowse session.

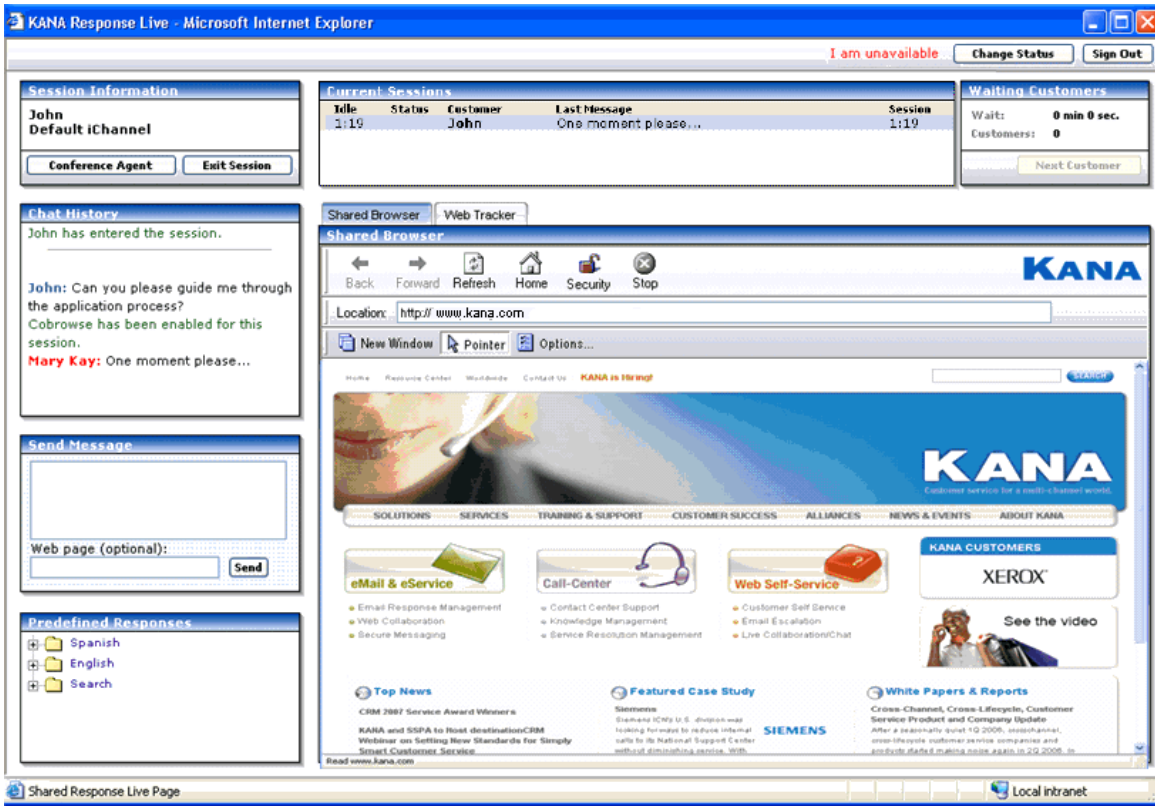
On Customer side, the Chat Console window will expand into a Shared Browser window. See Figure 9-19.

Figure 9-19 Customer Shared Browser

The Agent Console Shared Browser will load the Default Home Page URL set for the iChannel Cobrowse properties in the Administration tool. See Figure 9-20.

The same page will be loaded on the Customer Shared Browser.

Figure 9-20 Default Home Page



9 On the Agent Console Shared Browser, click on a link on the cobrowsed page or type a website URL in the Location field. The new page should load both on the Agent Shared Browser and the Customer Shared Browser.

10 On Customer Shared Browser, click on a link on the cobrowsed page or type a website URL in the Location field. The new page should load both on the Customer Shared Browser and the Agent Shared Browser.

11 Click the Exit button on the Customer Chat Console to end the Chat session. Click the Sign out button on the Agent Console to logout.

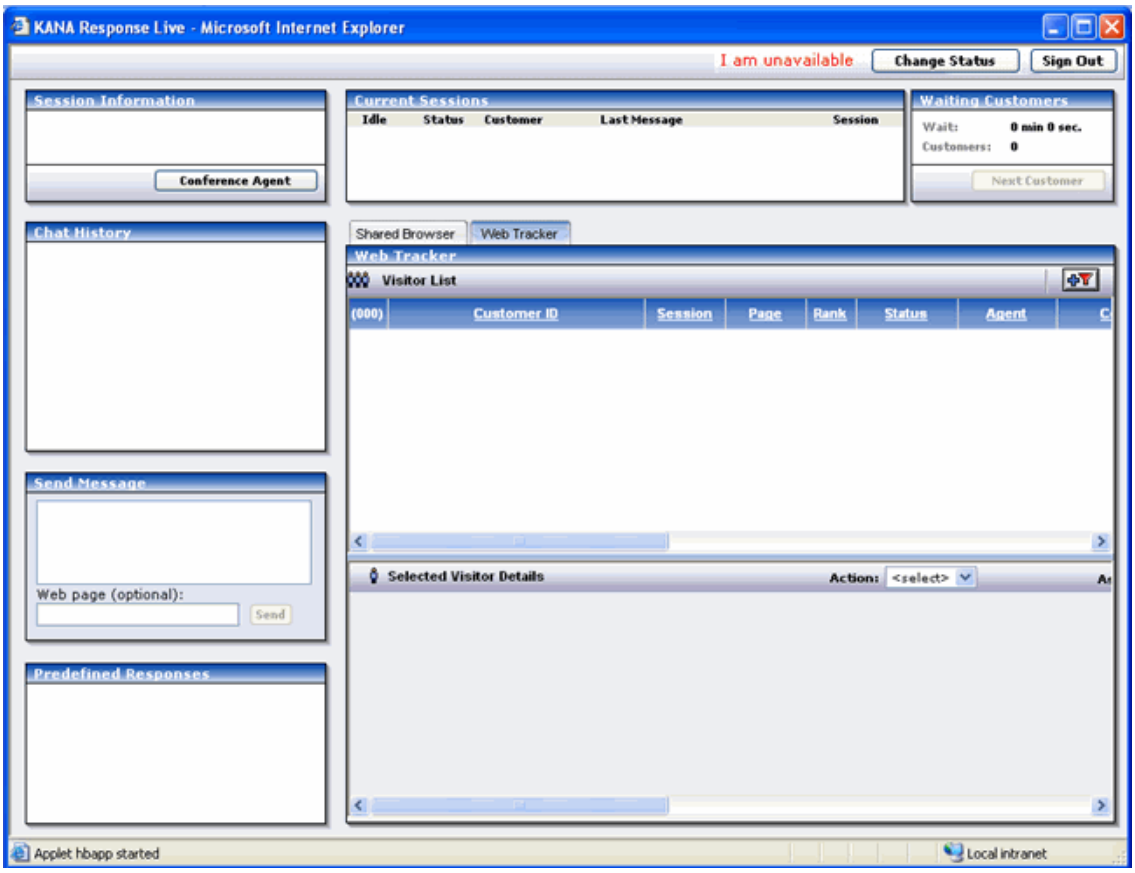
Test Customer Proactive Chat

12 Launch a browser. Load the http:<servername>/responselive/index.html page. See Figure 9-2.

13 Click the Launch Agent Page link.

14 You will see the Agent Console. See Figure 9-21.

Figure 9-21 Agent Console

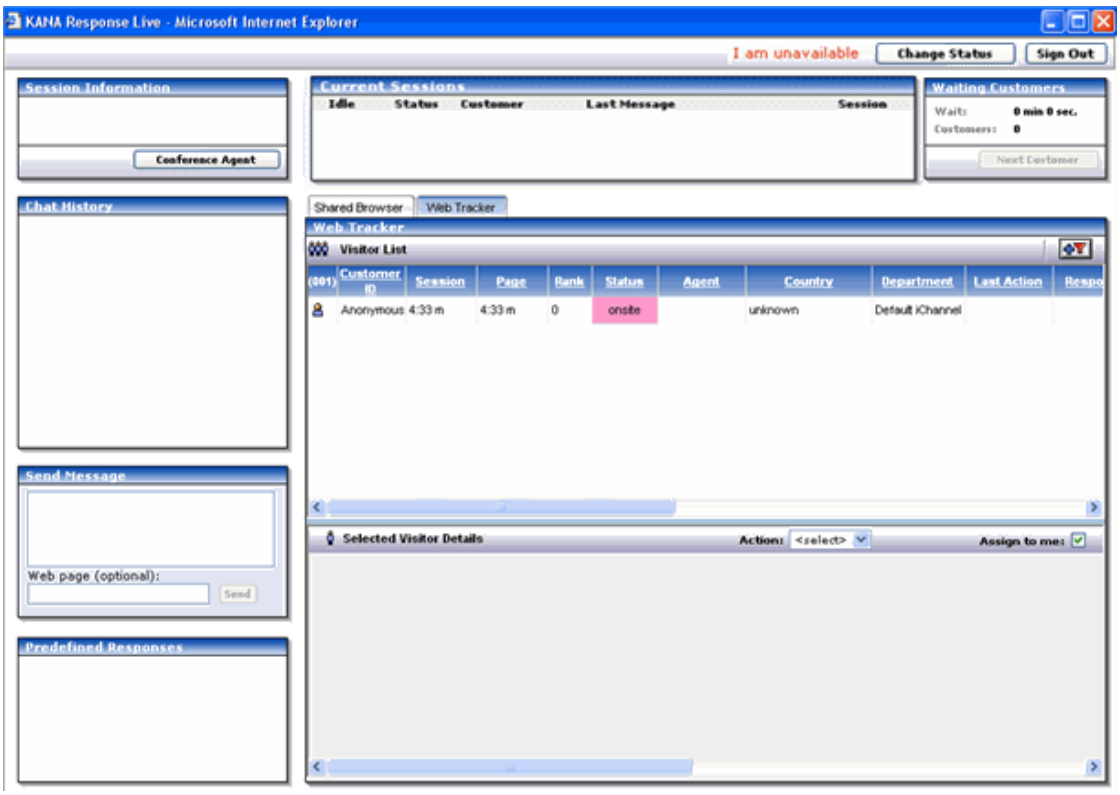


15 Launch a new browser; do not use a browser that is already running.

16 Navigate to a web page that is tracker-enabled in order to simulate a visitor. Refer to the *KANA Response Live Deployment Guide* for instructions on enabling the tracker on selected web pages.

17 On the Agent Console, you will see the visitor to your web page in the Web Tracker. See Figure 9-22.

Figure 9-22 Agent Console



1 Click the Sign out button on the Agent Console to logout.

The organization administrator can set up tracking rules and actions using the Organization Administration tool. Refer to the "KANA Response Live Organization Administration Tool Guide" for more information.

Chapter

10

Installing a Single Remote Webserver

Setting up a basic distributed deployment

KANA Response Live can be installed in a distributed environment, where the Web Server and application server run in different locations. While having the Response Live Web Server and application server on different machines may help in performance, the primary reason for supporting distributed deployments is security. You may want to only expose the Web Server with port 80 and 443 to the outside world, while keeping the application server within a trusted secure network. This chapter describes the steps to set up a basic distributed Response Live deployment.

IIS with Tomcat

IIS is configured to pipe Response Live content to the application server running Tomcat by using AJP (Apache Jakarta Project) connectors and an ISAPI filter. If IIS and Tomcat are running on the same machine, and the IIS default Website is used to handle Response Live requests, then the Response Live installer will set up and configure the AJP Connector for you, and no further action is needed.

❱ In order to have IIS and Tomcat running on different servers, read the following instructions.

1 Install Response Live on a stand alone server with IIS and verify the basic installation.

2 Identify the IIS server and Web site which will be used as the new, remote IIS server. Make sure to install an SSL certificate for this web site on the remote IIS server, through the Directory Services tab of the IIS Manager.

3 Verify the correct DNS entries are in place:

   a Ping the application server name from the Web Server and ensure it resolves to the primary IP address of the application server.

   b Ping the application server name from the application server and ensure it resolves to the primary IP address of the application server.

4 Confirm the ports on the firewall are open and you can ping and telnet from your customer Web Server to the application server for the following ports 8009, 8011 and 8013.

5 Go to the location where Response Live is installed and copy the following files to the Web Server:

```
<response_live_home>\tomcat\isapi_redirect.dll
<response_live_home>\tomcat\TomcatSetup.bat
<response_live_home>\tomcat\tomcatIIS.vbs
<response_live_home>\tomcat\conf\uriworkermap.properties
<response_live_home>\tomcat\conf\workers.properties
<response_live_home>\tomcat\logs\
```

   The resulting directory structure on the Web Server will look like the example here, assuming the files are copied to "C:\ResponseLive" on the Web Server:

```
C:\ResponseLive\tomcat\isapi_redirect.dll
C:\ResponseLive\tomcat\IISTomcatSetup.bat
C:\ResponseLive\tomcat\tomcatIIS.vbs
C:\ResponseLive\tomcat\conf\uriworkermap.properties
C:\ResponseLive\tomcat\conf\workers.properties
C:\ResponseLive\tomcat\logs\
```

6 Configure the three AJP Connector workers to point from localhost to the hostname or IP address of the Response Live Application server

running Tomcat. Edit the workers.properties file in C:\ResponseLive\tomcat\conf.

```
worker.ajp13.host=<Response_live_ApplicationServer_name_or_ip>
worker.ajp13FWS.host=<Response_live_ApplicationServer_name_or_ip>
worker.ajp13IMG.host=<Response_live_ApplicationServer_name_or_ip>
```

Note: The ports used by the AJP connectors are 8009, 8011, 8013 and 8015. These can be configured; however the ports specified in the workers.properties on the IIS server must match the ports for the four connectors defined in server.xml within the tomcat/conf of the Response Live application server.

7 Update the batch file TomcatSetup.bat under C:\ResponseLive\tomcat. Replace

```
"%1\hbroot\logs\tomcatsetup.log"
```

with

```
"%1\tomcat\logs\tomcatsetup.log"
```

This removes hbroot from the path.

Then run the following command:

```
"C:\ResponseLive\tomcat\TomcatSetup.bat
C:\ResponseLive"
```

This configure the Tomcat Connector for "Default Web Site" of IIS.

8 Verify the above step is successful by viewing the registry to find these values:

```
HKEY_LOCAL_MACHINE
   SOFTWARE
      Apache Software Foundation
         Jakarta Isapi Redirector
            1.0
```

Name	Data
extension_uri	/tomcat/isapi_redirect.dll
worker_file	C:\ResponseLive\tomcat\conf\workers.propertie

worker_mount_file	C:\ResponseLive\tomcat\conf\uriworkermap.properties
log_file	C:\ResponseLive\tomcat\logs\iis_redirect.log
log_level	Error

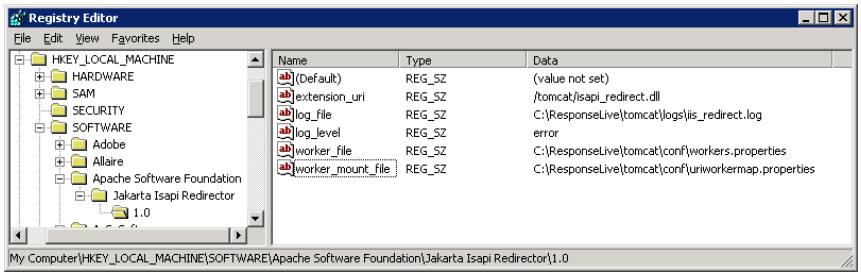
Note: You can use the Windows REGEDT32.EXE application, which is most likely in your C:\WINDOWS\SYSTEM32 directory. Regedit can be launched from the run menu of most Windows systems by typing "regedit".

These string values are read by the ISAPI Redirector at startup, and are used to initialize IIS. The following table provides a description of each of these variables.

Name	Data
extension_uri	The extension_uri variable represents the IIS virtual director, which will be created in the next step, plus the name of the ISAPI redirector file.
worker_file	The worker_file variable tells the ISAPI Redirector the location of the workers.properties file.
worker_mount_file	The worker_mount_file variable tells the ISAPI Redirector the location of the uriworkermap.properties file.
log_file	The log_file variable defines the name and location of the ISAPI Redirector's log file.
log_level	The log_level variable defines the debug level used when writing to the log file. The possible values are debug, info, error, and emerg.

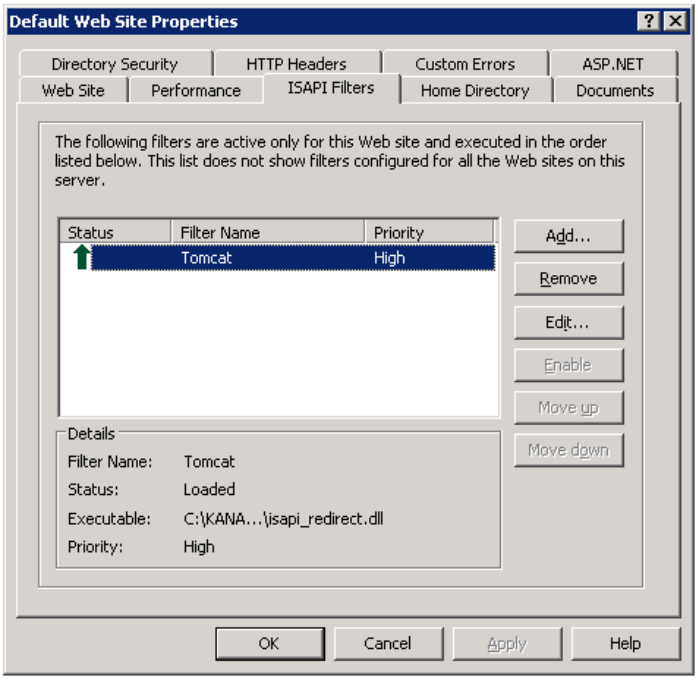
Your registry should resemble the following figure; the actual data values may be different.

Figure 10-1



9 Verify the ISAPI filter has been set in IIS, by viewing the default website properties, you must see "Tomcat" with a green Up arrow as shown in Figure

Figure 10-2



10 Restart the World Wide Web Publishing Service and IIS.

11 Create a virtual directory with an alias as “ResponseLive” and path directory as “C:\KANA\web”.

Response Live Application Server Configuration

Make the following changes on the ResponseLive Application Server after the Webserver install is complete.

1 Edit the config.properties file in <Response Live Home>/hbroot/conf/. Locate the property named

```
server.description.webserver=<Response Live host FQDN>
```

Change this value to the remote IIS server fully-qualified domain name.

2 In System Administration Tool, edit the iSystem properties for the Response Live server. In the 'Host Properties', change the 'Web Server Name' to the IIS server domain name.

3 Restart Response Live server

Testing the Distributed Install

➧ Follow these steps to test the installation:

1 Open the browser.

2 Enter the following URL:

http://<Customer Webserver>/CONAV/VER

You will see the Response Live Application version.

3 Open the browser and enter following URL: http://<CustomerWebserver >/CONAV/SYSADM.

You should see ResponseLive Sys Admin logon page:

4 Log on to the system.

If the tests are successful, make the changes in the next section.

Update the Chat links/Chat Launch URL

Update the URL on the chat links/test page to point to the customer facing Web Server so chat requests come through the customer facing Web Server.

Once these changes are made, log on the Agent console, and conduct a chat to test the system.

Chapter

11

Prochat/Tracker on a Single Remote Web Server

To set up a single remote Web server with Prochat, follow the instructions in *Installing a Single Remote Webserver*, and then continue with the steps in this chapter.

1. Make sure that the port 3306 on firewall has been opened and you can ping and telnet from the Application server to the Web Server.
2. On the Response Live Application server, go to the location where Response Live is installed and copy the following files to the Web Server:

```
<response_live_home>\tracker
<response_live_home>\mysql
<response_live_home>\php
<response_live_home>\licenses
```

3. The resulting directory structure on the Web Server will look like the example here, assuming the files are copied to "C:\ResponseLive" on the Web Server:

```
C:\ResponseLive\tracker
C:\ResponseLive\mysql
C:\ResponseLive\php
```

```
C:\ResponseLive\licenses
```

4 Configure C:\ResponseLive\mysql\my.ini to point to the current directory structure:

```
basedir=C:/ResponseLive/mysql
datadir=C:/ResponseLive/mysql/data
pid_file=C:/ResponseLive/mysql/data/mysqlk.pid
log_error=C:/ResponseLive/mysql/data/mysqlk.err
tmpdir=C:/ResponseLive/mysql/tmp/
```

5 Make MySQL a Windows service by running the following command:

```
C:\ResponseLive\mysql\bin\mysqld-nt --install MySQL --
defaults-file=C:\ResponseLive\mysql\my.ini
```

6 On the remote Web Server, locate php.ini in <response_live_home>\php\php.ini and update the following properties to reflect the new folder structure:

```
error_log = "C:\ResponseLive\php\logs\log.txt"
extension_dir = "C:\ResponseLive\php\ext"
```

7 Restart the IIS server and start MySQL Service.

Ensure that the MySQL service is up and running on the remote Web server before starting the application server.

Response Live Application Server Configuration

Make the following changes on the ResponseLive Application Server after completing the Webserver changes.

Edit the config.properties file in <Response Live Home>/hbroot/conf. Locate the property named database.tdb1.url. Change the value from localhost to the customer facing Web Server as follows:

```
database.tdb1.url= jdbc:mysql://
<Hostname_Of_Remote_Webserver>:3306/trackerq
```

Appendix

A

Appendix A: KANA Response Live Log files

There are several log files that are created as a result of a KANA Response Live installation. Each log file has a corresponding exception file, which contains only the exceptions that are found in the associated log file. The registry.exception, for instance, will contain all the exceptions from the hipregistry log file. The exception files contain the word 'Exception', followed by the problem description, shown in the example below:

```
Fri Mar 09 15:21:35 PST 2007
java.sql.SQLException:[Microsoft][SQLServer 2000 Driver for
JDBC]Connection reset by peer: socket write error
```

This is the line that Technical Support and Engineering will look for when a problem occurs. The exception provides them with valuable clues that they can use to pinpoint problems with your installation process.

The log and exception file pairs associated with a KANA Response Live installation are listed in the table below:

Table 1 KANA Response Live Log Files

File Name	Associated Exception File	Platforms
Hipregistry	registry.exception	All
Queuecontainer	queuecntr.exception	All\
Queuemgrd	queuemgr.exception	All
Router	router.exception	All
Tomcat	servlet.exception	All
Hipservice		Windows only
Tomcatsetup		Windows only
IIS_redirect		Windows only

The log and exception file pairs are described below with examples.

Hipregistry and registry.exception

The hipregistry file is the most critical log file that is used in troubleshooting. This file should contain a message indicating that the server is active, as shown below:

```
03/09/2007 13:41:15.069: RegistryServer: RegistryServer Active
```

If this message does not appear in this file, it implies that Response Live is not running, and will therefore be inaccessible.

The corresponding **registry.exception** file will simply state that the Logger is initializing if no errors are present, as shown below:

```
Fri Mar 09 13:41:14 PST 2007 Logger initializing
```

Queuecontainer and queuecntr.exception

In standalone mode, the queue container waits for the queue manager to come up. The queue manager sends a request to the queue containers to create queues. As a result of this request, the queue containers create queues to store customer information. If queues are not created, Response Live cannot function, as it will not have any queues to add customers to.

The absence of queues will in turn make it impossible for agents to view customers.

Every queue created in the queue container will be listed on a separate line in the **queuecontainer** log file. Here is an example of a queue container containing queues for the default iChannel:

```
03/09/2007 13:51:33.296: QueueImpl: becomePrimaryQueue: method
call count = 1 THREAD COUNT = 8 for ichannel = Default for org =
2
```

You should be able to find all the iChannels that have been defined for this Response Live server in this file. If an iChannel is not listed in this file, that particular iChannel will not have chat functionality.

If no errors are present, the corresponding **queuecntr.exception** file contains an informational message as shown below:

```
Fri Mar 09 13:41:20 PST 2007 Logger initializing
```

The **queuecontainer** log ideally should not contain any exceptions. You may sometimes see a qualified exception, such as a *Connect Exception*, due to a connection problem. Queue containers are dormant in integrated mode, so in this case this file will be empty.

Queuemgrd and queuemgr.exception

The queue manager has to come up in order for the queues to be created in the queue containers. The most common error in the queue manager log is a configuration error, where the queue manager is not found in the database, as shown in the example below:

```
KANA Response Live Queue Manager Server, Version V10.1.0.13
Copyright 2005 KANA Inc.

03/05/2007 10:38:42.725: QueueingDataSourceFactory: Using
com.hipbone.db.queue.a
03/05/2007 10:38:42.780: QueueManagerImpl: QueueManager started
on kanhp005.pdev.kana.com does not directly correspond to
datasource information.
03/05/2007 10:38:42.795: QueueManagerServer:
Error:  Queue Manager does not exist in datasource.  Probably a
configuration error.
```

This error can be corrected through a simple change in the System administration tool, where you will ensure that the name specified for the queue manager is the same name as that of the queue manager server.

Queue Containers and Queue Managers are dormant in integrated mode, and will, therefore, be empty.

Router and router.exception

The **router** log file normally contains only one line indicating that Response Live is using the router as shown below:

```
03/09/2007 13:41:35.973: GeneralRoutingManager: Using
com.hipbone.router.managers.GeneralRoutingManager
```

The presence of any other messages or errors indicates a problem with the Response Live server. The corresponding **router.exception** file will contain a simple informational message if no errors are present:

```
Fri Mar 09 13:41:17 PST 2007 Logger initializing
```

Tomcat and servlet.exception

The **tomcat** log file contains the application server messages and informational messages related to the Supervisor Console, which is available only in standalone mode. If the Supervisor Console is enabled, this log file starts with a message that the server is down. As each component comes online, and the application server gets data from the component, a message is logged for that component stating that it is running successfully.

Until we see the version information for the server, we cannot be sure that the server is completely up and running, or if the server started correctly. If the Supervisor Console is enabled, the last line at the bottom of the file should indicate that the server is running as well.

```
KANA Response Live MessageRouting Server, Version V10.1.0.13
Copyright 2005 KANA Inc.

03/05/2007 13:41:46.612: g: Server live is up.
```

The corresponding **servlet.exception** file contains an informational message if no errors are present, as shown below:

```
Fri Mar 05 13:41:46 PST 2007 Logger initializing
```

Other log files

There are some additional files that do not have corresponding exception files associated with them. Of these, the **HipService** and **Tomcatsetup** log files are found only on Windows.

On the Windows platform, Response Live can be run as a service if desired. This option is not available on Unix platforms. The **HipService** log file will display errors if there are any problems with starting up the Response Live service. If the service starts up successfully, further logs can be found in the Response Live logs folder. When Response Live is installed as a service, and if it is installed correctly, the **Hipservice** file in Windows should display the following message:

```
Service KANAResponseLive installed
```

The **Tomcatsetup** file is used only during installation on Windows as well. The installer writes messages to this file during the set up of the isapi filter on IIS. This log file is helpful in debugging problems where IIS communicates with Tomcat. An example of the Tomcatsetup file is shown below:

```
Microsoft (R) Windows Script Host Version 5.6
Copyright (C) Microsoft Corporation 1996-2001. All rights
reserved.

The default server string is IIS://LocalHost/w3svc/1
# args = 1
installDir= D:\KANA
D:\\KANA
defaultServerStringIIS://LocalHost/w3svc/1
got to the next line
should have filters set
filters.adspath = IIS://LocalHost/w3svc/1/Filters
FilterLoadOrder = Tomcat
error accessing websvc.IIS5IsolationModeEnabled, assuming IIS
version < 6.0
err = 438 and description is Object doesn't support this
property or method
```

Another file known as the **IIS_redirect** log file is found only in a Windows installation as well. This log file logs any interactions of the IIS with Tomcat, and is helpful in debugging problems where IIS communicates with Tomcat.

Webserver logs are the logs generated by the Web Server, such as IIS or Apache. These logs can be found in the logs directory of the Web Server. They are very helpful in identifying any Web Server related issues such as 'Page not found' errors or SSL issues.

Appendix A: KANA Response Live Log files