

KINETIC **SR** (Survey and Request)



Installation and Configuration Guide Version 4.0

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Contents

CHAPTER 1 OVERVIEW	6
Kinetic SR (Survey and Request)	6
The Installer Overview.....	6
Pre-requisites	6
Licensing	7
Server licensing.....	7
User (Manager) licensing.....	7
Remedy AR System licensing.....	7
Support	7
CHAPTER 2 INSTALLATION.....	8
Downloading the Installer	8
Running the Installer	8
CHAPTER 3 OTHER WEB SERVERS.....	24
Deploying Kinetic SR.....	24
Shared Remedy Java Resources	27
Shared Jar files	27
CHAPTER 4 CONFIGURATION.....	29
Configuration Manager Hyperlinks.....	29
Web Component Info.....	30
Viewing Web Component Information	30
Refresh Properties	31
Viewing Properties.....	31
Open Encryption Form.....	32
Task Manager Service.....	32
Exporting and Importing Templates.....	33
Migrating a template is a two-step process.....	33
Export Template	33
Import Template.....	35
Update Web Server	36
Configuration Manager Tabs.....	37
Users Tab.....	37
Configuration Items Tab.....	38
Add a Configuration Item.....	38
Modify a Configuration Item	38
The Exceptions Tab.....	39
The Audit Tab	39

View an Audit Item:	40
Web Messages Tab	40
Manage Messages Tab	40
Attribute Types Tab	42
Style Tab.....	44
Patterns Tab.....	45

Figures

- Figure 1: InstallAnywhere timing screen 8
- Figure 2: Introduction screen..... 9
- Figure 3: Where Would You Like to Install? 10
- Figure 4: Installation Option 11
- Figure 5: Choose a File..... 12
- Figure 6: ARS Connection information..... 13
- Figure 7: Configuring ARS Connection Information..... 14
- Figure 8: Enter License Keys..... 15
- Figure 9: Configuring ARS Connection Information..... 15
- Figure 10: Request Web User 16
- Figure 11: Web Component Details 17
- Figure 12: Please Wait 18
- Figure 13: Tomcat Optimizations..... 19
- Figure 14: JDK Directory..... 19
- Figure 15: Select the deployment folder..... 20
- Figure 16: Pre-Installation Summary..... 21
- Figure 17: ARS Data and/or Definition Import 21
- Figure 18: Installing Kinetic SR 22
- Figure 19: Install Complete..... 23
- Figure 20: Configuration Manager 29
- Figure 21: Configuration Menu Hyperlinks 30
- Figure 22: Example Web Component Info 31
- Figure 23: Properties Viewer Page..... 32
- Figure 24: Export Login 33
- Figure 25: Export Login 34
- Figure 26: Export Template 34
- Figure 27: Import Template..... 35
- Figure 28: Change Web Server..... 36
- Figure 29: Configuration Manager 37
- Figure 30: Web Logging Level Choices..... 39
- Figure 31: Kinetic Audit Information 40
- Figure 32: Manage Messages Tab 41
- Figure 33: Attribute Types Tab..... 42
- Figure 34: Add/Modify Attribute Type dialog..... 43
- Figure 35: Configuration Manager, Style Tab..... 44
- Figure 36: Pattern Tab (Add) 45

Chapter 1

OVERVIEW

KINETIC SR (SURVEY AND REQUEST)

IMPORTANT

To install **Kinetic SR** software, an installer must be a Remedy Administrator and have some knowledge and access to your intended Web server.

This manual is intended for AR System administrators, not users or managers.

TIP

Often an Administrator will choose to install the Tomcat web component in a development environment to get running quickly. Then for a staging/production environment manually install the web application to an existing web server.

Kinetic Survey™ and Kinetic Request™ are comprehensive Enterprise Feedback Management (EFM) applications for creating and administering all types of templates, reports and forms using Remedy's Action Request System® (AR System).

This installation and configuration guide is applicable to both applications. References will be to both systems, simultaneously, as **Kinetic SR**.

THE INSTALLER OVERVIEW

Kinetic SR is typically installed using an executable installer and includes two parts: Installing the Remedy forms, workflow and data, and installing a Tomcat Web Server and Kinetic SR Web component. The installer does include an option to choose just the Remedy component, just the web server component or both, so it may be run multiple times to accommodate your environment.

For the Remedy component the installer can be run from any Windows machine. The installer will connect to your Remedy server to import the necessary components and configure the necessary data.

For the web component, the installer must be run on the machine that is to host your web server and again must be a Windows machine. If you prefer to install the web component on another operating system, a different web server, or an existing Tomcat instance, just install the Remedy components and follow the directions later in this manual to manually deploy the web application.

PRE-REQUISITES

- The machine on which the setup file will run, must have the administrator tool loaded with a version that corresponds to your Remedy AR System. (This is chosen as part of the installation procedure).
- Java Development Kit (JDK) 1.5 or greater (needed only if Tomcat will be installed on this server).
- BMC Remedy AR Server 6.0 or greater.

- If Tomcat is not going to be installed, a stand Servlet Engine such as ServletExec AS or IBM Websphere is required with JDK version 1.4.2 or above.

LICENSING

Kinetic SR is licensed per AR System server **and** per Kinetic SR Manager user.

SERVER LICENSING

Kinetic Survey and Kinetic Request are licensed separately. If both applications are purchased, a license key is included for each application.

NOTE:

If an organization has a production server and a development server, it's necessary to purchase a license for each server.

The applications are licensed per Remedy server. The license key is tied to your AR System or your Remedy Server. An organization can choose to have as many web servers as needed pointing to a Remedy server, but licenses are purchased per Remedy Server.

Each AR System production server, on which **Kinetic SR** is installed, must have its own license.

USER (MANAGER) LICENSING

Kinetic SR Managers can use both Kinetic Survey and Kinetic Request with one license purchase. Manager licenses are named licenses.

Example: If Jane works in Kinetic Survey and Kinetic Request, she does not need two Manager licenses, but only one in order to access both systems. But if Jane works only in Kinetic Survey and Joe works in Kinetic Request, they will each require one Manager license.

If the number of users exceeds the number of licenses purchased, users receive a warning dialog when opening the manager console. There is no limitation to the number of inspectors or submitters (customers) using the system.

REMEDY AR SYSTEM LICENSING

Kinetic SR licenses are in addition to any AR System licenses needed for your users, and do not take the place of AR System licenses. See AR System documentation.

SUPPORT

For customer service support, go to the support section of our Web site <http://www.kineticdata.com> or call 651/695-8566

Chapter 2

INSTALLATION

DOWNLOADING THE INSTALLER

To download the installer, follow the instructions from Kinetic Data when you receive your license key. The installer consists of one file (Setup.exe) that will be run from a Windows machine.

RUNNING THE INSTALLER

The following are instructions for using the installer (Setup.exe).

1. Double click on the “**Setup.exe**” icon. The InstallAnywhere timing screen will appear as the contents are unpacked.

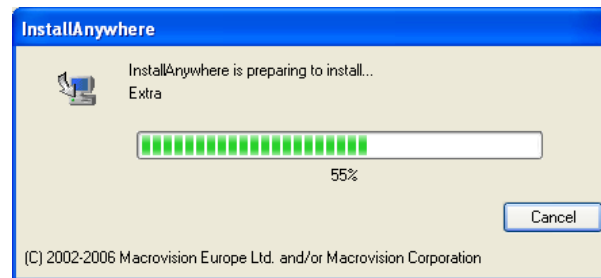


Figure 1: InstallAnywhere timing screen

2. The **InstallAnywhere Introduction** screen states the software title and version currently being installed on your system. **InstallAnywhere** will guide you through the installation.

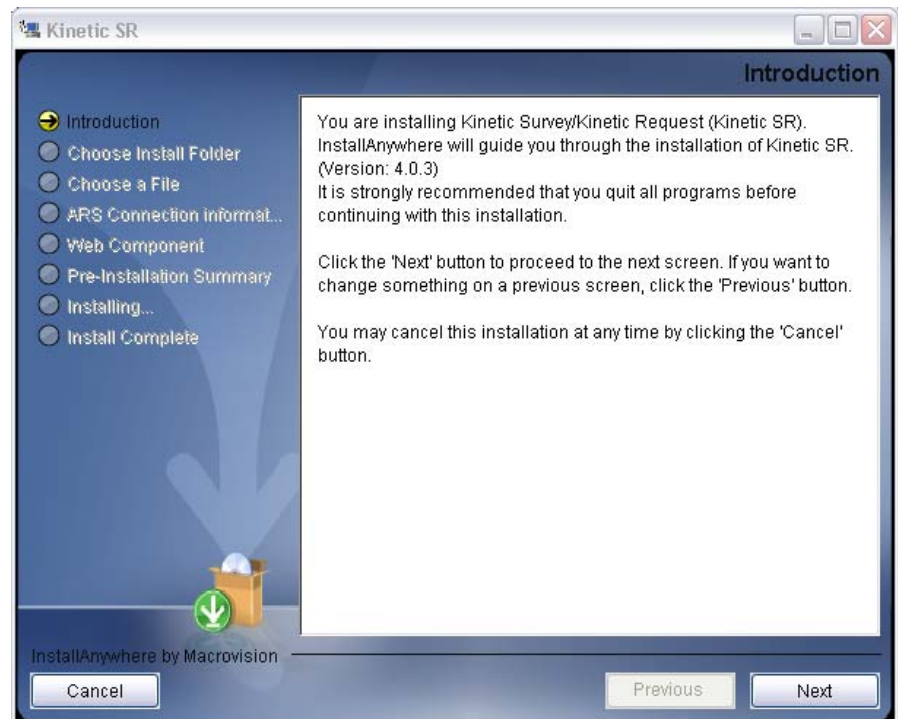


Figure 2: Introduction screen

3. Click Next.

4. From the **Choose Install Folder** screen select where you would like to install the locally installed components. For the Remedy Component, only documentation and web application files are created. If the web component option is chosen, an instance of Apache Tomcat will be installed in this directory, as well.

Click the choose button, if you would like to change the installation directory.

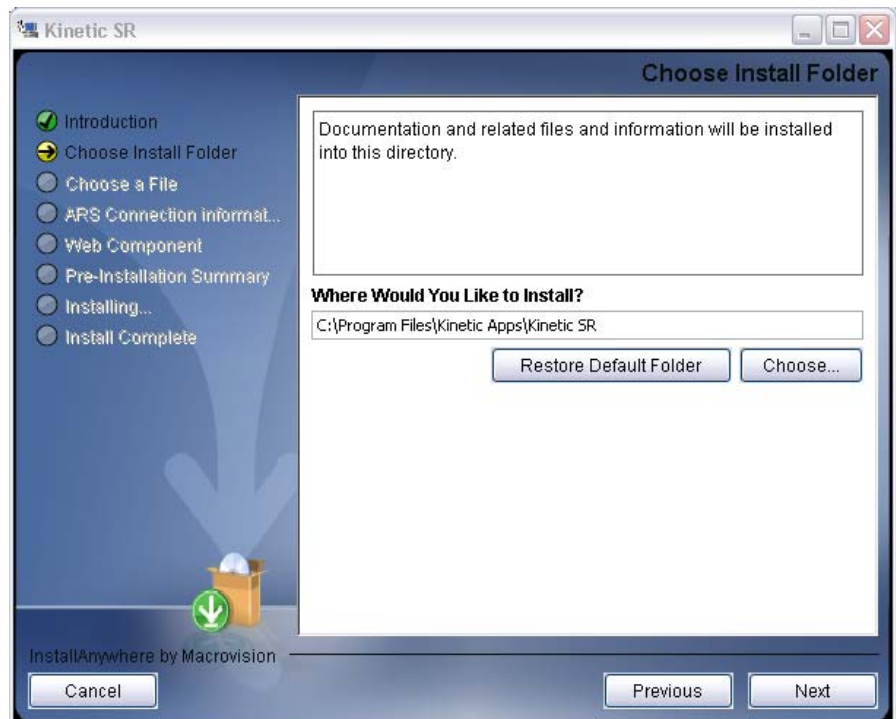


Figure 3: Where Would You Like to Install?

5. Click **Next**.

6. The **Installation option** screen appears. From here you can choose to install the ARS Definitions and/or installation options for the web component.
7. Uncheck the **ARS** checkbox if only the web component is to be installed.
8. Choose the web component option that is appropriate:
 - a. **Local Tomcat webserver:** A new instance of Tomcat will be installed. Later, you will have the option of choosing a port to run this instance on.
 - b. **Add to an existing Kinetic Tomcat installation:** Tomcat will not be installed with this option. The web application files will be installed inside an existing Tomcat instance. This is most common if you have another Kinetic Data application installed prior to Kinetic SR. Later, you will have the option of setting the directory to create the files.
 - c. **Don't install web component:** No web component files or Tomcat instance will be installed.

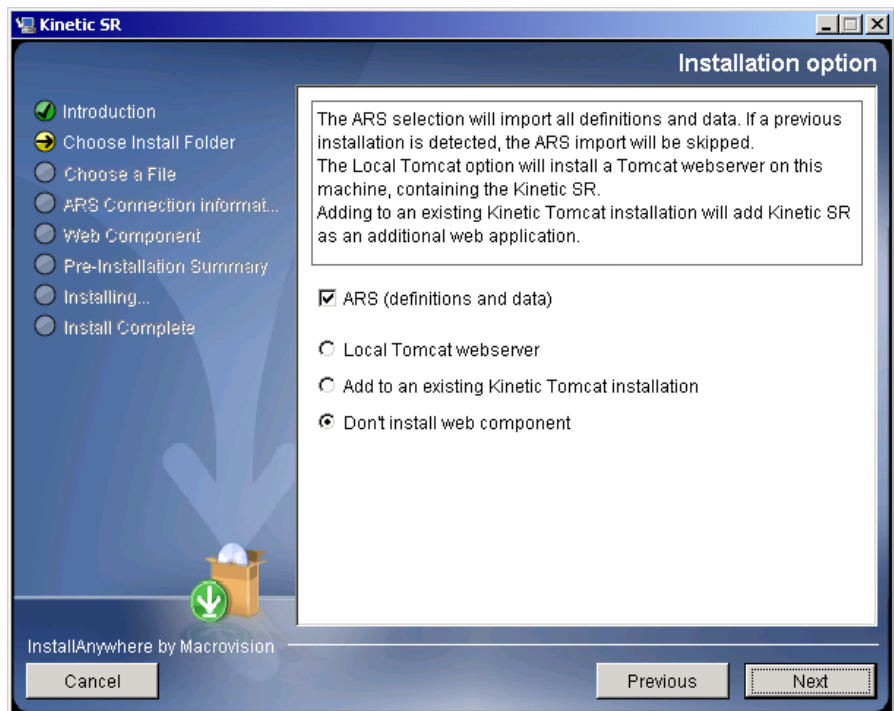


Figure 4: Installation Option

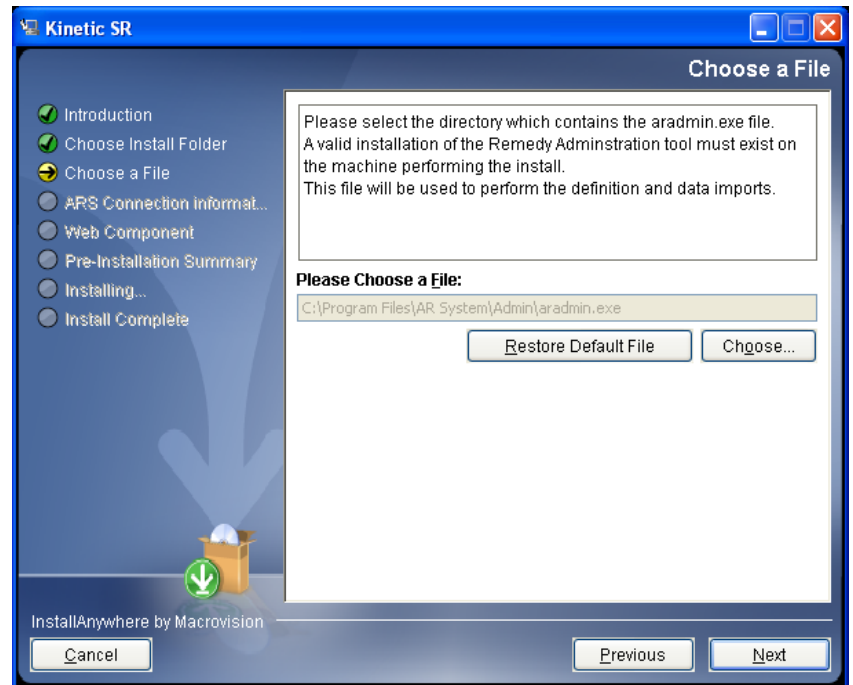
IMPORTANT:

The **aradmin** tool you choose should correspond to the version of your Remedy server.

If you have both a 63 and a 70 Admin tool and you have a 70 server, choose the 70 Admin tool to be installed.

9. From the **Choose a File** screen, pick the directory which your Remedy Administrator tool is installed (**aradmin.exe**). The Admin tool version selected should correspond with the version of your AR System Server.

Click the "Choose" button to select the correct directory.



- 10.

Figure 5: Choose a File

11. Click **Next**.
12. The **ARS Connection Information Screen** will appear. Enter your ARS information including server, ports, and Midtier server URL.

This information is used to connect to your AR Server if you are installing the ARS components, and for the web server configuration, as well.

NOTE: If you are only installing into an existing Kinetic Tomcat instance, the ARS Web Connection information screen will not include the MidTier



Figure 6: ARS Connection information

13. Enter the **AR Server** name or your Remedy server name.

Note: If you typically connect to your AR Server via a fully qualified name, enter that name here.

Example: ARServer.mycompany.com

This server name must exactly match the server name provided to Kinetic Data when generating your license key.

14. Enter the **Login name**. If installing the ARS components, this person must have administrator access. It will be through this user that the forms and definitions will be imported into your server. If only the web component is being installed, this user can be an existing Kinetic SR "default web user" or an Administrator.
15. Enter a **Password**.
16. Enter **TCP** and **RPC** ports. If you have ports configured for your AR Server, enter them here. If you do not then leave them as "0."
17. Enter **Authentication** of use and the authentication string, if applicable. If not, leave blank.
18. Enter a **Mid-tier server name** (if applicable) to reflect the path to your mid-tier server. Example:

<http://mymidtierserver.mycompany.com/arsys/>

Note: This question will only be displayed if installing the ARS Component.

19. Review all lines for accuracy.
20. Click **Next**.

Please wait while Kinetic SR is being configured. The system is retrieving the server version and applying the correct information, as well as verifying that the user is an Administrator and has the correct permissions.

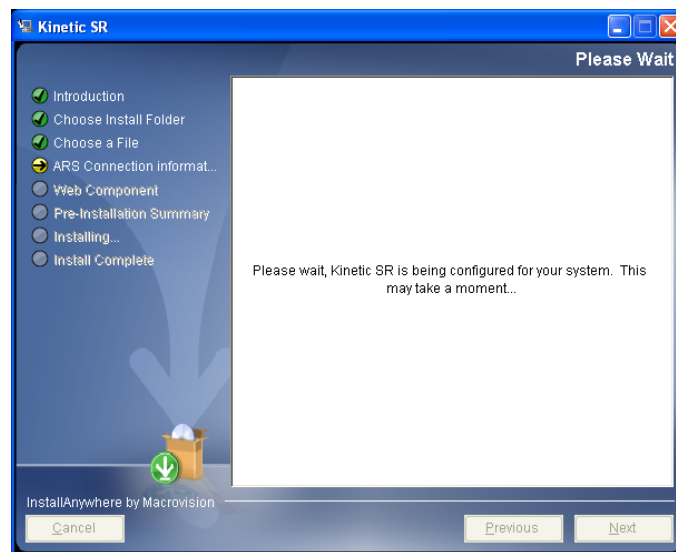


Figure 7: Configuring ARS Connection Information

21. The license key screen appears next. You have a choice of either entering the license keys on this screen, or later using the Remedy User tool. If you do enter them here, it is best to simply copy and paste the values from the email you received from Kinetic Data. Make sure there are no spaces before or after the serial numbers.

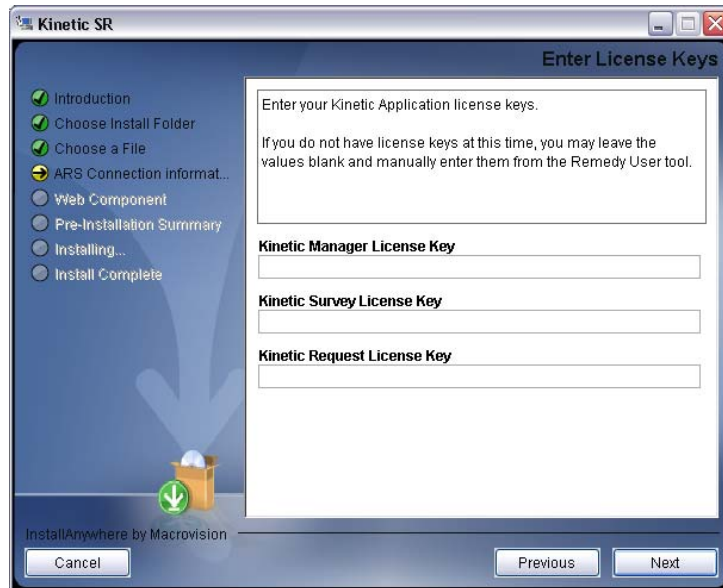


Figure 8: Enter License Keys

22. Click **Next**.

Again, please wait while Kinetic SR is being configured.

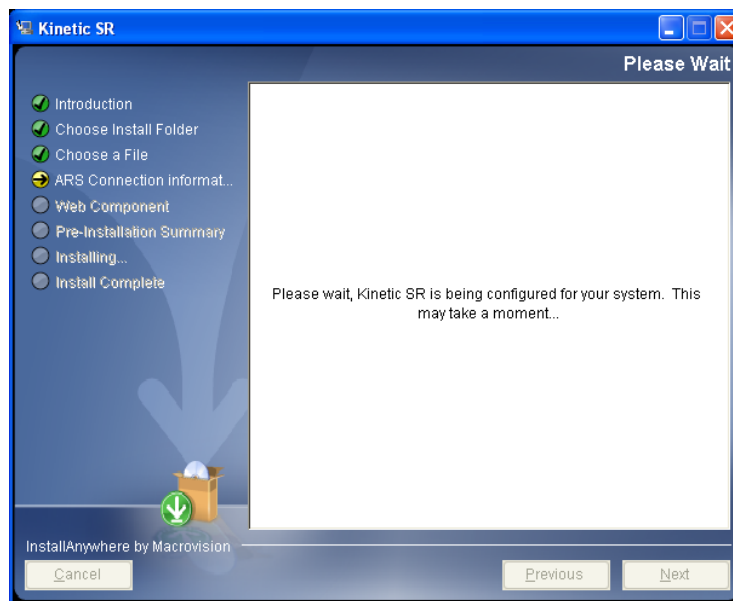


Figure 9: Configuring ARS Connection Information

The **Request Web User** screen appears (NOTE: Screen does not appear when only installing into an existing Kinetic Tomcat instance). Kinetic SR needs a default user record with the appropriate credentials to handle some interactions with the AR

Server. The user entered here will be created with the appropriate groups and a fixed license.

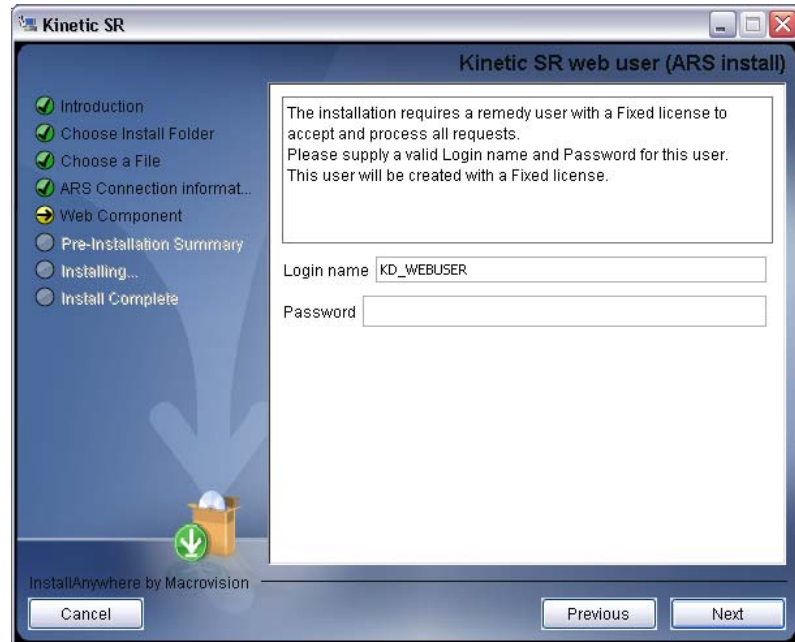


Figure 10: Request Web User

Note: If there are multiple web servers connecting to a single Remedy server, other users will need to be manually created; one for each web server.

23. By default, this login name is called **KD_WEBUSER**. You may change it if you see fit.
24. Enter a **Password**. Use your company's normal protocol.
25. Click **Next**.
26. The **Web component details** screen appears. The information in this screen is used to configure the URL information for the sample data.

NOTE: If a new Tomcat installation is being created, the port number will also be checked to make sure it is not already in use.

NOTE:

The default **Port Number** is **8080**.

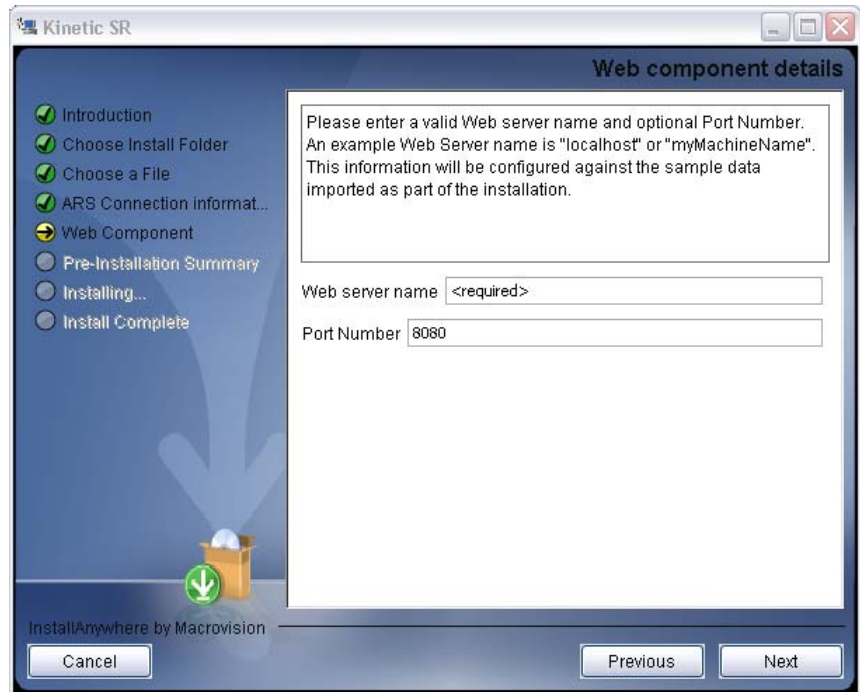


Figure 11: Web Component Details

27. Enter the name of the default web server (or alias) used for your installation. This will be used for configuring the sample data. This is not visible if not installing the ARS component. Example: "mywebserver.mycompany.com" or "209.98.44.22".
28. Change the Port Number if necessary for the Tomcat installation. You will be prompted if the port number entered is already in use.
29. Click **Next**. A **Please Wait** screen appears while Kinetic SR configures your system.

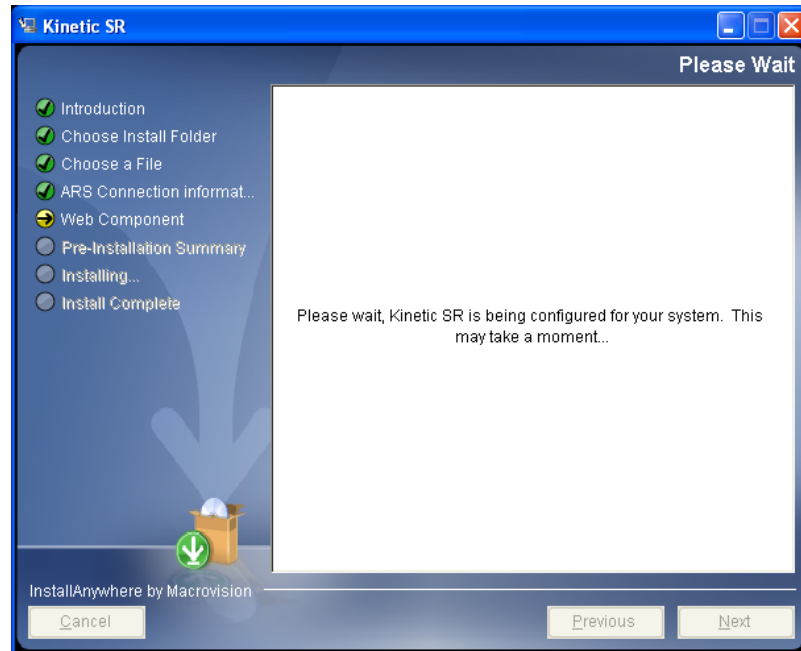


Figure 12: Please Wait

30. If you have entered a Port number that is currently in use, enter a new Port number. Click **OK** for the previous screen to appear and enter the new Port number.



31. Click **Next** and wait as Kinetic SR configures your system.
32. A Tomcat optimization screen will appear. Here you can choose to install Tomcat with default development mode settings, or performance tuned production mode optimizations. The production mode optimizations will require a Tomcat service restart if any of the JSP files change in the Kinetic SR web application. Development mode settings allow the JSP pages to compile on the fly, but also include a performance hit.

You may also change the default heap memory sizes allocated to the Tomcat instance.

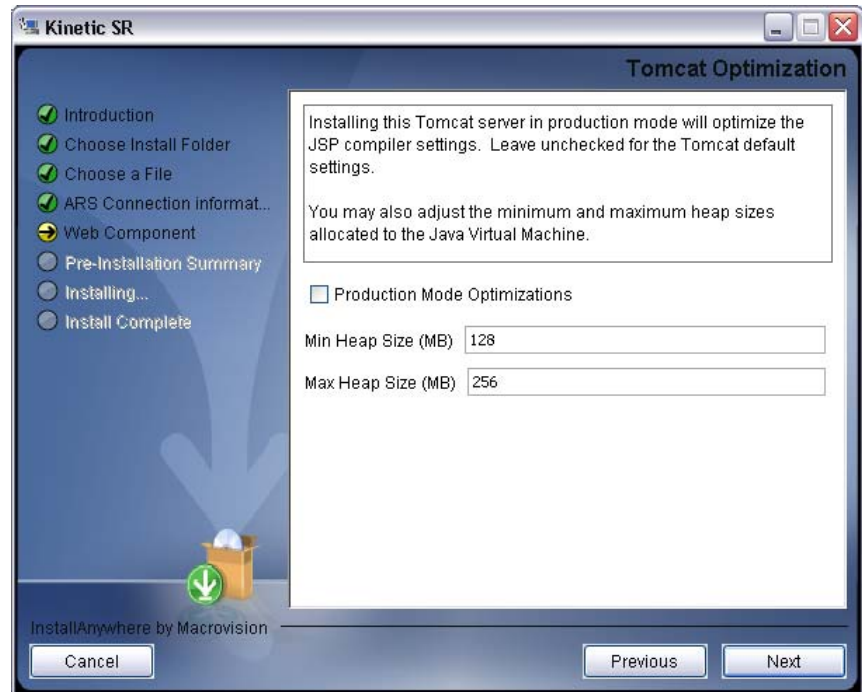


Figure 13: Tomcat Optimizations

33. Click **Next**.

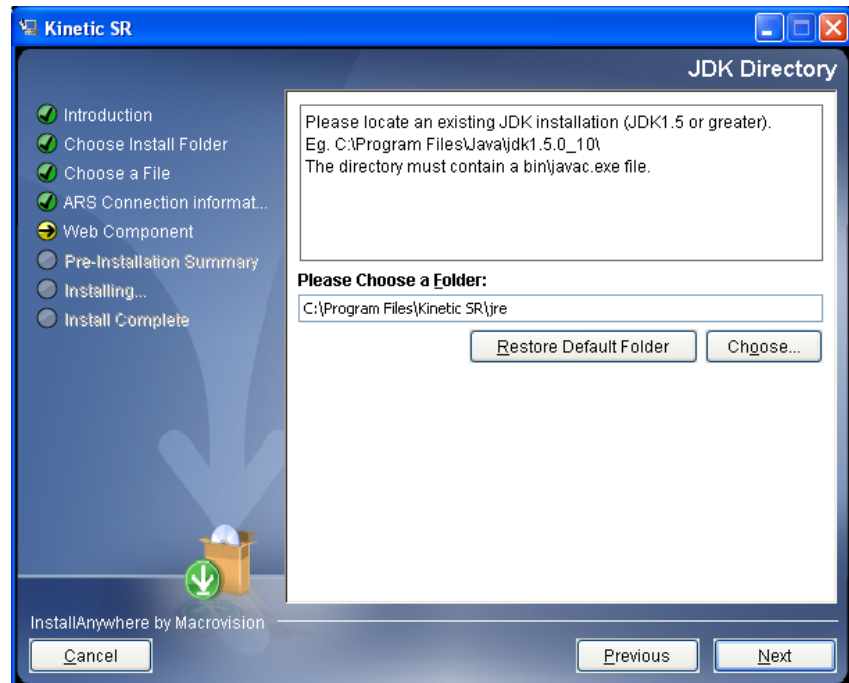


Figure 14: JDK Directory

34. From the **JDK Directory** screen (Shown for new Tomcat installations only), locate an existing JDK installation. Click **Choose** to browse for the location. A JDK 1.5 or greater is required.
35. Click **Next**. Please Wait while Kinetic SR is being configured for your system.
36. The **Select deployment folder** screen appears (Only shown for existing Kinetic Tomcat installations).

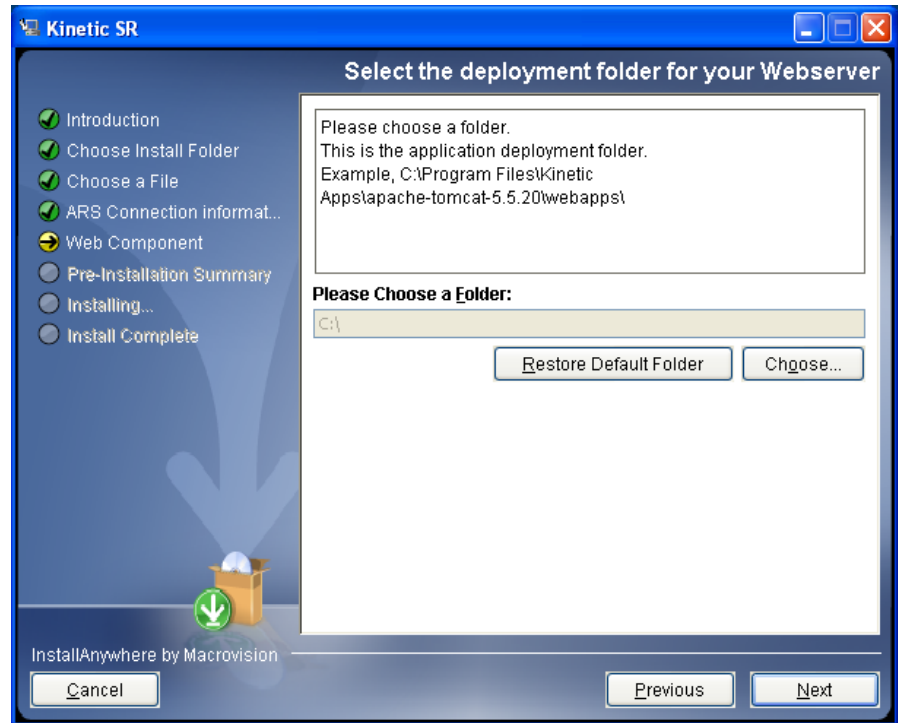


Figure 15: Select the deployment folder

37. Choose the “webapps” folder for your existing Kinetic Tomcat installation. This is where the “kinetic” web application will be installed.
38. Click **Next**.
39. From the **Pre-Installation Summary** screen, please review the following for accuracy before continuing.

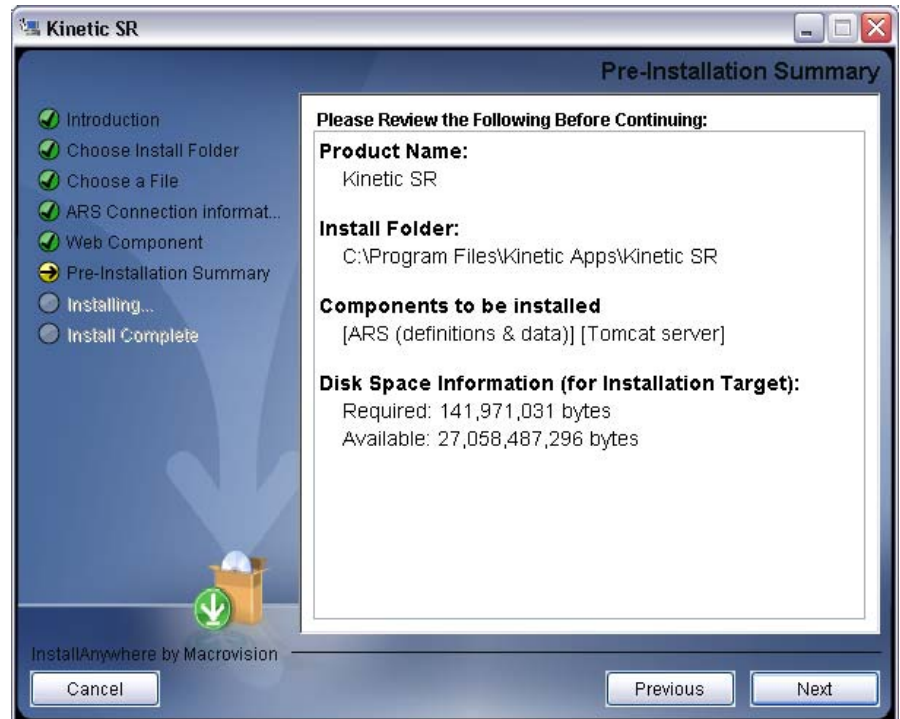


Figure 16: Pre-Installation Summary

40. Click **Next**. The **ARS Data and/or definition import** screen appears verifying that you have elected to import ARS data and/or definitions.

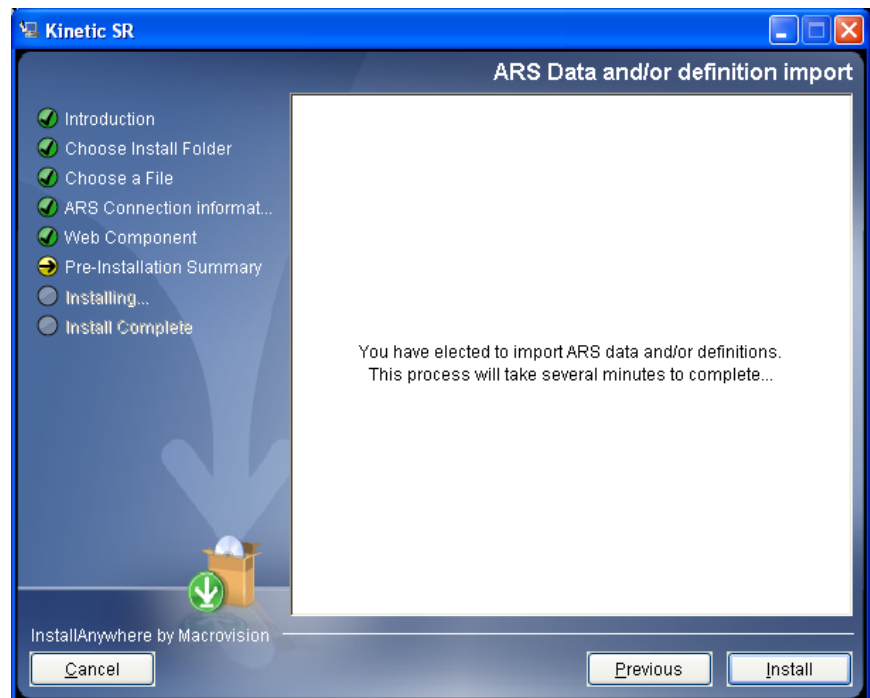


Figure 17: ARS Data and/or Definition Import

41. Click **Install**. This process will take at least 20 minutes to complete. Please do not interrupt the process until the **Install Complete** notification has appeared.

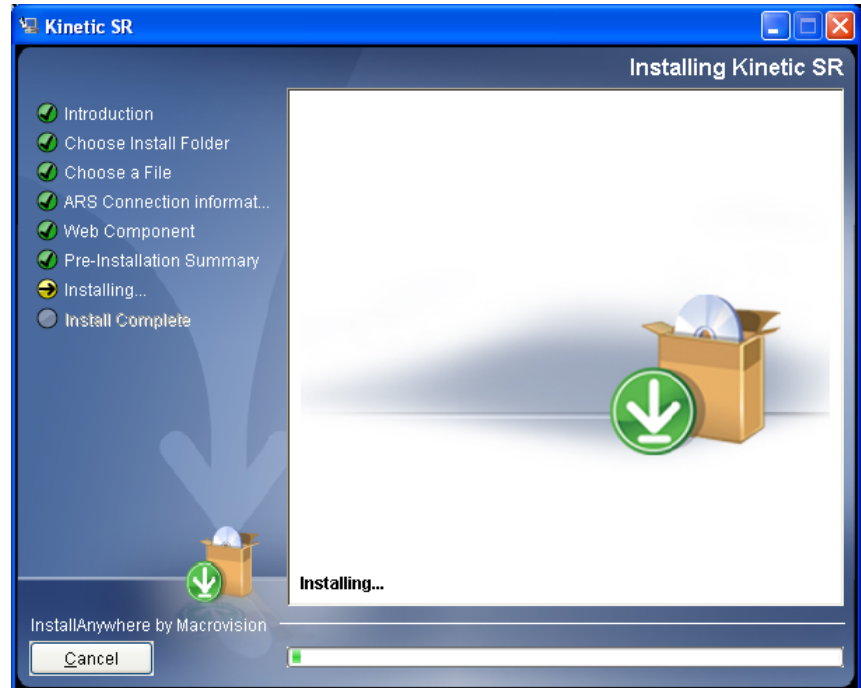


Figure 18: Installing Kinetic SR

42. After the installation is complete, you may be asked to restart your computer if the Tomcat Web Server was installed.

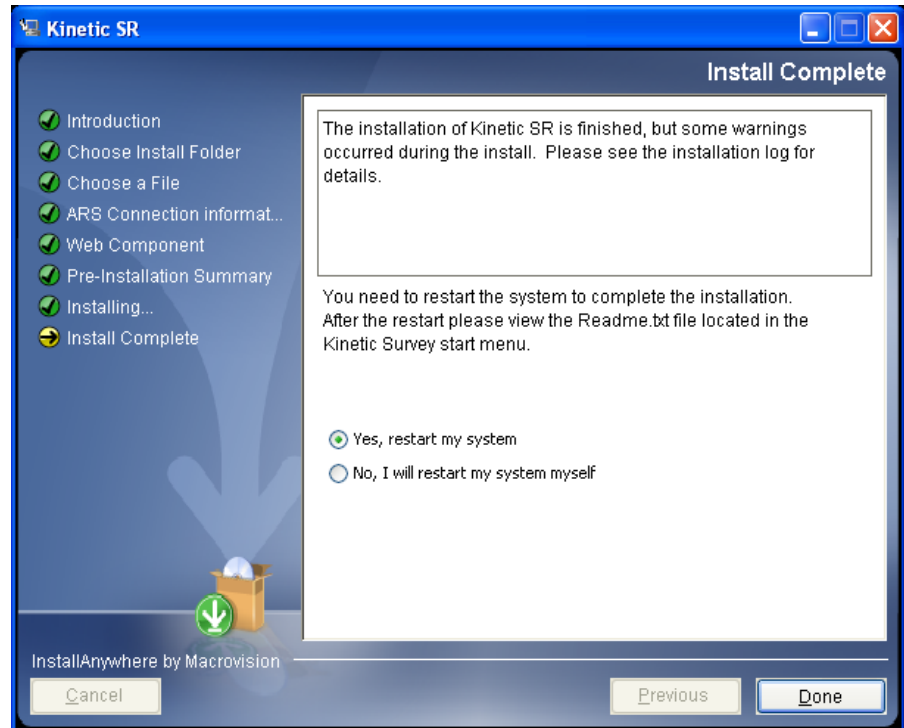


Figure 19: Install Complete

43. From the **Install Complete** screen click either, **Yes**, restart my system, or **No**, I will restart my system myself.
44. Click **Done**. The installation of Kinetic SR is finished.

Congratulations. Kinetic Survey and Kinetic Request are now installed on your server.

If any warnings occurred you can view the log files in the installation directory you chose at the beginning of the installation.

The **Kinetic_SR_InstallLog.log** contains an overview of the installation including any severe errors. Inside the logs directory, an individual log is created for each component installed and data file imported.

Note: For each set of data imported, see **.arx.log**. For each set of work flow imported, see **.def.log** (Remedy forms).

Support: For customer service, please contact the support section of our web site <http://www.kineticdata.com> or call 651/695-8566.

Chapter 3

OTHER WEB SERVERS

Kinetic SR can be installed with a stand-alone Apache Tomcat server for easy deployment. However, in many situations, another Servlet Container may be required.

Kinetic SR is created as a standard J2EE web application and can be deployed into almost any standard Web Server/Servlet Container including Tomcat, Websphere or ServletExec AS.

The following sections describe the general process for deploying to other servlet containers. Each container may have other processes for deploying an application. Please refer to your specific documentation for complete instructions.

Note: The terminology for web servers may be confusing. Servlet containers are often called web servers. However, not all web servers are servlet containers and some servlet containers require a separate web server. Some examples may help:

- **IIS:** Web Server (not a servlet container)
- **ServletExec IS:** A lightweight servlet container that requires a web server front end like IIS. This is what Remedy Mid-Tier was bundled with prior to version 7.
- **ServletExec AS:** The application server version of ServletExec. This can run as a servlet container and web server, or can connect up to IIS or other web servers for front end page serving.
- **Apache Tomcat:** An open source servlet container that can also be used as a stand-alone web server.
- **Apache Web Server:** An open-source web server. This is not a servlet container, and is often paired with Tomcat as a back-end servlet container.

DEPLOYING KINETIC SR

Deploying Kinetic SR to a web server involves moving the directories included in your installation to your web server as well as configuring some of the web server properties.

Note: If you need a specific WAR file for your environment (Web application archive), contact Kinetic Data support and we can provide one.

Terminology:

- **Installation Directory:** This is a backup copy of the web application files that the installer placed on the local hard drive. The default location for this directory is C:\Program Files\Kinetic Apps\Kinetic SR\.
- **Webapps Directory <webapps>:** This is the directory where your web server is hosting your web application. Please consult

your web server manual if you need help determining where your web server's web application directory is located.

- o An example for Tomcat would be: <TomcatDir>\webapps\
- o An example for ServletExec AS would be: C:\Program Files\New Atlanta\Servlet Exec AS\se-
<instance>\webapps\

1. Locate the installation directory chosen at the beginning of the installation. The files needed have been included in the **Web** directory.
2. Move the "kinetic" directory into the "webapps" directory of your web server for automatic deployment or another desired location on your web server.
3. Add the kinetic application context to your web server configuration. This is often done from a management/configuration screen for your environment. Typically this involves:
 - a. Naming the application. Example KineticSR
 - b. Including the URL context. The default is "/kinetic/"
 - c. Including the path to the kinetic directory moved in step 2.
 - d. NOTE: This step is usually not necessary for Tomcat, as tomcat will automatically add the application when the service is started.
4. Include the ARS API files specific to your ARS installation. If you are installing Kinetic SR on the same instance of a web server running BMC Remedy Mid-tier, please read the next section on [Shared Java Resources](#) before doing this step.

The kdi_arshelpers.jar file is included as part of Kinetic SR. The other API files are also included in the installation directory. However, we suggest getting the latest version/patch that your ARServer is using. You can typically find these in your AR System/ARServer/Api/lib directory, or in the WEB-INF/lib directory of your Mid-Tier installation. These can also be downloaded from www.ARSWiki.org.

Place these files in the <webapps>/kinetic/WEB-INF/lib directory. This would include minimally:

- a. kdi_arshelpers.jar found in <installation directory>/Web/
- b. Arapi6x/7x.jar
- c. Arutil6x/7x.jar
- d. If no other Remedy applications are installed on your machine (such as Midtier/Flashboards/Email Engine etc), you will also need to include the dll's. You can look in the <installation directory>/Web/<your AR Version> to see what files are necessary.

5. Locate your web.xml found in your <webapps>/kinetic/WEB-INF/ directory. Update the **web.xml** file with your default web user and

path information doing the following: Locate the SurveyInit servlet declaration, near the top of the file. It will look like this:

```
<servlet-name>SurveyInit</servlet-name>
<display-name>SurveyInit</display-name>
...
```

Update the **DEFAULT_USER** and **DEFAULT_PWD** parameters for your web user, entered when installing the ARS Component. The default is KD_WEBUSER.

Note: For multiple web servers you will need a separate web user for each web server unless your web user has Remedy Administrator privileges.

If you want to encrypt your password, rather than storing a plain text version, set the **ENCRYPT_PASSWORD** parameter to "true". You will then need to go to the encryption form, enter the user password, and paste the encrypted version of the password into the web.xml **DEFAULT_PWD** parameter. See [Encrypt Password](#) for more information.

Update the **PATH_TO_REMEDY_PROPERTIES** parameter, with the path to your properties file (to be updated in the next step). This would look something like:

```
<webapps>\WEB-INF\ksr.properties OR
/home/admin/tomcat/webapps/kinetic/WEB-INF/ksr.properties
```

6. Update your **ksr.properties** file located in the `<webapps>/kinetic/WEB-INF/` directory. The following properties should be updated:
 - a. **DEFAULT_SERVER:** This should be the name of your remedy server and must match the server name provided to kinetic data when your key was generated.
 - b. **DEFAULT_TCP/RPC:** Enter your ports used to connect to your AR Server. If no ports are used, leave as 0.
 - c. **FULL_PATH_TO_SURVEYS:** This is the path to your surveys directory within your web app directory. This is where attachments are deployed. You may either use forward slashes (/) in your paths or escape backslashes (\). An example:
C:\tomcat\webapps\kinetic\surveys\
 - d. **FULL_PATH_TO_CONTEXT:** Same as above, but to your root web app directory. An example:
C:\tomcat\webapps\kinetic\
 - e. **DEFAULT_LOG_LEVEL:** By default this is "ALL" for a development environment. However, for a production environment "INFO" is recommended.
 - f. **WSURL:** Include the URL of this web server. This is used to startup the Task Management process used for creating approvals and other AR System records.

TIP:

In a large environment, you may want to have multiple application servers run the Task Manager process. To do this, alter the **POLLER_QUERY** property so that the tasks that each server picks up do not overlap.

The process checks records in the KS_RQT_CustomerSurvey_Task_join form. So, you could alter the query to include different 'CategoryInstanceID' values (catalog Ids) and have each server pick up tasks for different service catalogs.

- g. **CREATOR_SLEEP_DELAY**: This is the number of seconds that the Task Management process sleeps between polls when tasks are created. The default is 60.

IMPORTANT NOTE: If you do not want the process to run, such as if you only purchased Kinetic Survey, or the process is already running on another web server, this should be set to **0** (zero).

7. Restart your Web Server/Servlet Container. You should be ready to go.

SHARED REMEDY JAVA RESOURCES

Because the BMC Remedy Java API uses a JNI interface, there are some special requirements if the Servlet Container running Kinetic SR is also running BMC Remedy Mid-Tier.

A few notes on sharing a servlet container:

- Kinetic Survey/Kinetic Request can no longer be installed inside your Mid-tier application (inside the Mid-Tier directory) as it could in previous versions of the product.
- ServletExec ISAPI is not supported if Mid-Tier is already installed inside this container because shared libraries are not available. ServletExec AS is supported, and ServletExec ISAPI is supported if Kinetic SR is the only Remedy-based web application running.
- If you are setting up a new environment we suggest installing BMC Remedy Mid-Tier first. Testing your install, then installing Kinetic SR Web component as described earlier.

SHARED JAR FILES

To run the applications together in the same instance, you must move some jar files that both applications need to a directory that is available to your container for this purpose. To do this:

1. Copy the **kdi_arshelpers.jar** from your kinetic/WEB-INF/lib directory. You will need this file in step 4.
2. Copy the **arapi6x/7x.jar** and **arutil6x/7x.jar** from BOTH the kinetic/WEB-INF/lib AND your Mid-Tier/WEB-INF/lib directories. You will need these files in step 4.
3. Place these files in the shared directory for your servlet container:

- a. For Tomcat this is in **Tomcat/shared/lib/**
- b. For ServletExec AS, this is **ServletExec AS/<SE instance>/classes/**.

For SE you must also alter the ServletExec AS/<SE instance>/StartServletExec.bat script to include these three files in the classpath. You will see a `-classpath` line followed by many paths, each separated by a semi-colon. Enter the path to each jar after the last item in the path.

- c. For other web servers or more information, please see your specific server's documentation.
4. In a shared environment, you should not include the other DLL's/libraries that you would typically include in your kinetic/WEB-INF/lib directory. These are already included in the Mid-Tier server and added to the PATH environment variable for your server.

IMPORTANT NOTE: When you upgrade your Mid-Tier server in a shared environment you will need to again remove the jars from your Mid-Tier/WEB-INF/lib directory. You should replace the files in the shared directory with these new files.

Chapter 4 CONFIGURATION

The Configuration Manager allows Remedy Administrators to monitor and control some of the behaviors of Kinetic Survey and Kinetic Request.

Remedy Administrators can access the Configuration Manager via the “**Configuration**” link on the left side of either the Kinetic Survey Author console or the Kinetic Request Service Catalog Console.

It is within this area that an administrator can manage configuration items including the ability to:

- Set configuration items like default web server and the license keys.
- Monitor stuck email messages.
- arrange answer patterns from which users can choose
- create error messages that submitters will see, and much more.

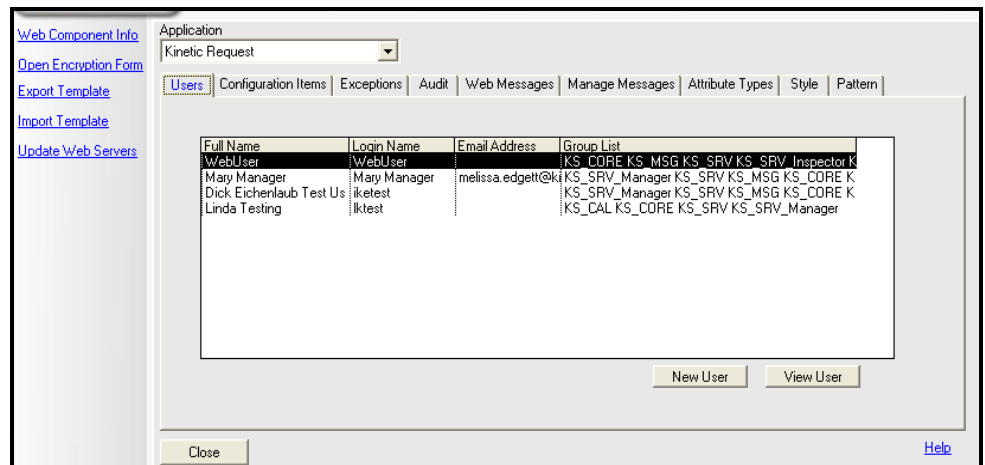


Figure 20: Configuration Manager

CONFIGURATION MANAGER HYPERLINKS

The hyperlinks to help manage some of these configuration applications (located on the left side of the Configuration screen), include:

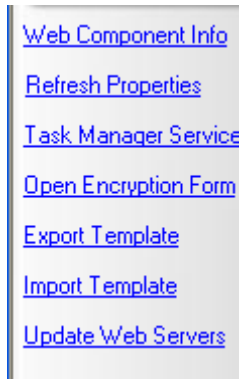


Figure 21: Configuration Menu Hyperlinks

All of the links will require Remedy Administrator credentials. Links that refer to web-based configurations will show a login screen.

Click on the item to be directed to that information.

- Web Component Info
- Refresh Properties
- Task Manager Service
- Export Template
- Import Template
- Update Web Server

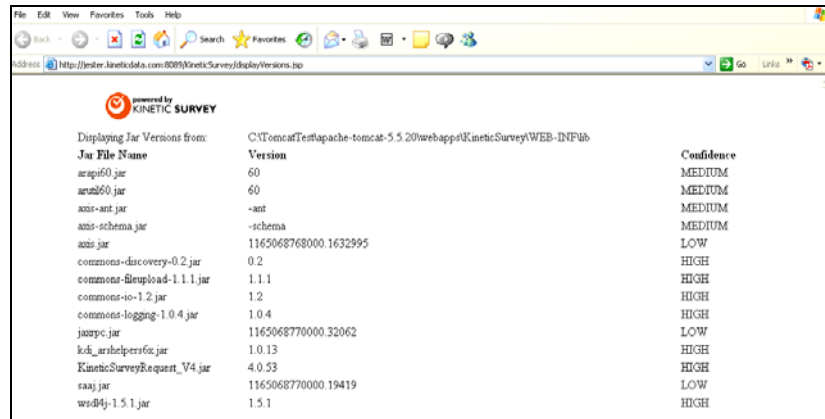
WEB COMPONENT INFO

This process offers the ability to access the web server(s) on which you plan to publish surveys or requests.

VIEWING WEB COMPONENT INFORMATION

45. Click on the **Web Component Info** hyperlink for useful information (i.e., build number, version and other identifiers).

This could be helpful information when working with Kinetic Data Support in troubleshooting an issue.



Jar File Name	Version	Confidence
scapi60.jar	60	MEDIUM
scapi60.jar	60	MEDIUM
axis-ant.jar	-ant	MEDIUM
axis-schema.jar	-schema	MEDIUM
axis.jar	1165068770000.1632995	LOW
commons-discovery-0.2.jar	0.2	HIGH
commons-fileupload-1.1.1.jar	1.1.1	HIGH
commons-io-1.2.jar	1.2	HIGH
commons-logging-1.0.4.jar	1.0.4	HIGH
jaopvc.jar	1165068770000.32062	LOW
kdi_arhelpers6.jar	1.0.13	HIGH
KineticSurveyRequest_V4.jar	4.0.53	HIGH
saaj.jar	1165068770000.19419	LOW
wsdl4j-1.5.1.jar	1.5.1	HIGH

Figure 22: Example Web Component Info

REFRESH PROPERTIES

This process allows you the ability to see the properties that have been set in your `ksr.properties` file when you installed the Kinetic SR Web Component in the same way the Web Component Info does. This will also signal the web server specified in the URL to refresh the properties. This allows you to change properties without restarting your web server.

Note: If you have multiple web servers, you will need to manually alter the URL to point to other web servers beyond your default server.

VIEWING PROPERTIES

1. Click on the **Refresh Properties** to refresh and view your web server properties.



Current Logger Level	ALL
DEFAULT_TCP	0
DEFAULT_MESSAGE_PAGE	/surveyMessage.jsp
DEFAULT_REDIRECT_TO	/displayPage.jsp
ADVANCE_EDITOR	/Editor/AdvanceEditor.jsp
ENCRYPT_PASSWORD	false
ALTERNATE_PWD	
CREATOR_SLEEP_DELAY	60
WSURL	http://leopard.kineticdata.com/kinetic/services
MAX_LOG_SIZE	1048576
SURVEY_USER_MESSAGES_FORM	KS_SRV_WebUserMessage
CUSTOMER_SURVEY_FORM	KS_SRV_CustomerSurvey_base
SURVEY_DEPLOYMENT_DIR	/kinetic/
LOG_FILE_NAME	C:/Program Files/New Atlanta/ServletExec AS/se-leopard/webapps/kinetic/logs/kslog.log
EXCEPTION_FORM	KS_ACC_Exception_Handler
POLLER_QUERY	((('Outbound_Type' = "ARSystem-Form") OR ('Outbound_Type' = "Approval")) AND 'Communication_Status'=\$NULL\$ AND 'Status' = "In Progress"
SURVEY_DIRECTORY	surveys/
MAP_FIELDS_COUNT	128
FULL_PATH_TO_SURVEYS	C:/Program Files/New Atlanta/ServletExec AS/se-leopard/webapps/kinetic/surveys/
ALTERNATE_USER	
DEFAULT_RPC	0
FULL_PATH_TO_CONTEXT	C:/Program Files/New Atlanta/ServletExec AS/se-leopard/webapps/kinetic/
SURVEY_CONFIG_FORM	KS_SRV_ConfigurationValue
SUBMIT_TO_FORM	KS_SRV_CustomerSurvey_base

Figure 23: Properties Viewer Page

OPEN ENCRYPTION FORM

The **Open Encryption Form** hyperlink opens a browser window to the encryption form and allows an administrator to take the default “Web User” password and encrypt it. The encrypted password is then stored in the web.xml file.

Please note that it is not a requirement that passwords be encrypted.

See [the web server installation](#) section for further information.

TASK MANAGER SERVICE

The **Task Manager Service** hyperlink opens a browser window to view and change the status of the Task Manager Service. This service polls your arsystem server at regular intervals creating approvals and other arsystem records when indicated.

Typically, this service runs on one web server. Care should be taken if running in multiple web servers to alter the query so each web server is handling a subset of all tasks. This query is managed in the ksr.properties file on each of your web servers.

Clicking on the link will open the Task Manager display.



Tasks are stopped and started from this page. Tasks in Kinetic Request give you the ability to extend the functionality of your service items. You can use tasks to add approvals, or create entries in other Remedy forms, or other systems. (Important note for users of multiple websevers: You must go to each individual server to stop and start Tasks for that server.)

URL	Start	Stop	Current Status
http://127.0.0.1:8081/kinetic/services/KineticRecordPoller			RUNNING

Figure 24:Export Login

From this window you can view the current status of the service as well as Start/Stop the service.

EXPORTING AND IMPORTING TEMPLATES

Exporting and importing templates involves taking an entire template with all the elements, styles, etc., and moves that “out of” (export) or “into” (import) your survey or request template.

NOTE:

The exporting and importing template links, make it easier for a user to create a template from a development (or staging) environment and then move that template over to production, or another server.

NOTE: This action includes the definition of your “template” information. It does not export data related to submitted requests.

Anything that requires merging or migrating to a production or a staging environment would be accomplished here. In addition, sharing templates or downloading new samples from Kinetic Data is also much easier.

MIGRATING A TEMPLATE IS A TWO-STEP PROCESS.

First, export the template out from your “Source” server. This process will create a zip file that contains the arx (Remedy ARS data) files needed for the export, along with a text file of the export information.

The next step, Importing, involves taking the newly created zip file and importing it into your “Destination” server. This two-step process is important for audit ability when moving from one environment to another.

EXPORT TEMPLATE

The export function requires an Administrator’s password.

1. From the left side of the Configuration screen, click **Export Template**. This can also be done directly from the “Advanced” tab on the Manager Consoles.

A log-in window will open.

Figure 25: Export Login

2. Type in **User** and **Password** ID.
3. Type in an **Authentication String** if required.
4. Click **Submit**.

Figure 26: Export Template

5. From the **Export Template** screen choose the template you want to export from the menu provided. Include the **Category/Service Catalog** and **Data Set**, if applicable.

Note: If the **categories** and **data set** boxes are checked when exporting templates, they will **override** those existing categories and data sets in your destination template.

6. Include a **Related Message Template**, if applicable. (By default, **Message Template** is unchecked.) See **Important Note on Message Templates** in the sidebar.
7. Click **Submit**. Expect a pause as the system collects data.
8. Click **Download the Zip**. A prompt will appear to download.

IMPORTANT NOTE:

Message templates can be related to one or more templates. Use caution in choosing whether you want to migrate related message templates with the export, or not.

The reason for this, is the system will take any message templates with the same category as the one selected, and migrate those over. You may want to manually move message templates.

9. **Save** the information through the browser, to your desktop, hard drive or network. Information is now ready to be imported into your destination file or template.

IMPORT TEMPLATE

The import function requires an Administrator's password.

Importing only includes the definition of your "template" information and does not import information received from filled-out requests.

The importing function looks at a selected file or template from your importing source and compares it to the destination file or template. It evaluates and coordinates the two so they are "mirror" images of each other. It performs this function by adding "new" records, and modifying and deleting existing records not included in your import source.

Important Note: If a question is on your destination server, but not on your source server (meaning the question was deleted), when importing the template, this question will be deleted, along with any answers, on your destination server. For historical reasons, it is often desirable to hide questions that are no longer needed rather than deleting them.

1. From the left side of the Configuration screen, click **Import Template**. A log-in window will open.
2. Type in **User** and **Password ID**.
3. Type in an **Authentication String**.
4. Click **Submit**.

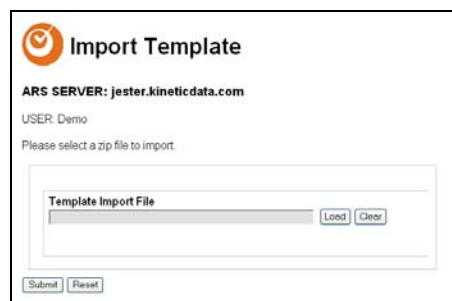


Figure 27: Import Template

5. Click **Load** to import a zip file.
6. Open the chosen file and click **Upload** to bring the zip file into the **Template Import File** location. See Figure above.

Clear: A file can be changed by clicking **Clear** to empty the field. Click on **Load**, again, to locate another file and **Upload** to enter the file into the Template Import File field.

7. Click **Submit**. Expect a pause as the system migrates (or imports) this new information into your server.
8. As the data is moved from one server to the other, The web server setting from your source server data will now be set on your destination server. You will likely want to update this web server information. This can be done from the “Advanced” tab of the Manager consoles, or from the Update Web Server link discussed in the next section.

UPDATE WEB SERVER

Use the **Update Web Server** hyperlink to update a group of templates from one web server to another. This is particularly helpful if migrating from a development server to a production server, or updating sample data as a batch.

1. Clicking on the **Update Web Servers** hyperlink brings up the **Change Web Server** dialog.

This dialog enables you to pick one, some, or all of your current web servers and move them to another web server individually or at the same time.

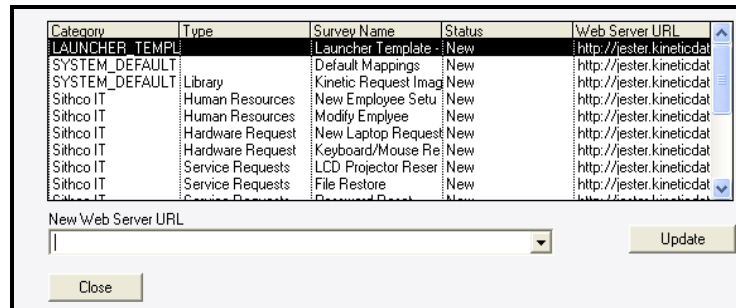


Figure 28: Change Web Server

2. Choose one or more templates from the table field to update. If you started from Kinetic Survey you will only see Survey templates, if coming from Kinetic Request, you will only see Service Items.
3. Select the **New Web Server URL** from the menu.
4. Click **Update**. The process may take a few minutes if many templates are selected. When updating a web server, image links and other html references must be changed in each template.

CONFIGURATION MANAGER TABS

The Configuration link allows administrators to configure parts of Kinetic Request including:

- Users Tab
- Configuration Items Tab
- The Exceptions Tab
- The Audit Tab
- Web Messages Tab
- Manage Messages Tab
- Attribute Types Tab
- Style Tab
- Patterns Tab

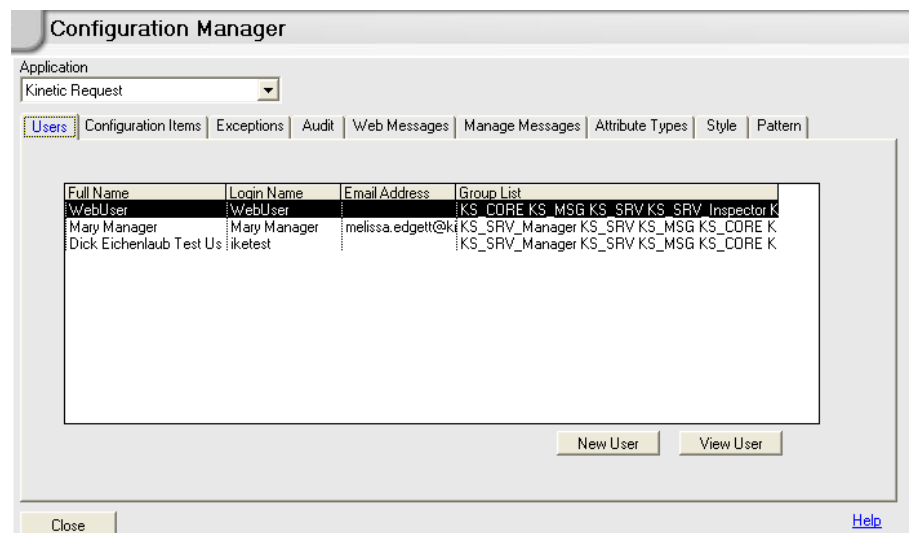


Figure 29: Configuration Manager

Note: The Tabs entitled **Categories**, **Attribute Types** and **Style** are application specific to either Kinetic Survey or Kinetic Request (i.e. Categories does not appear in Kinetic Request, while Attribute Type and Style contain similar but different information for each application).

USERS TAB

The users tab displays a list of users that have permission to one or more “KS_SRV” groups. From this tab you can highlight a user to view their record or create a new user.

Using one of these buttons will open your AR System **User** form. The Configuration Manager dialog needs to be closed before the User record can be modified.

See your AR System documentation for more information on adding or modifying users.

CONFIGURATION ITEMS TAB

The configuration items tab displays information on the configuration of your system. This is typically used during the installation of the application and does not need to be changed unless your environment changes.

ADD A CONFIGURATION ITEM

1. From Configuration Manager click the Configuration Items tab and click Add.
2. Make a selection from the **Configuration Type** drop-down list box.
3. Select a **Locale** from the drop-down list box. For example: *English (Canadian)*.
4. Select a **Status** from the drop-down list box.
5. Select a **Property** from the drop-down list box. For example: *Remedy Property or Web Property*.
6. Enter your configuration value in the **Configuration Value** field. For example: *Submit* if you select *Submit Button Text* for the **Configuration Type**.
7. Click the ellipses (...) next to the **Configuration Value** field to add, edit or delete content in that field.
8. Click the **Save** button. Your new Configuration Item is saved.

MODIFY A CONFIGURATION ITEM

9. Double click on the **Configuration Item**. Click the **Modify** button.
10. Make your modifications to the **Configuration Type, Locale, Status, Property** and/or **Configuration Value** fields.
11. Click the **Save** button.

THE EXCEPTIONS TAB

The exceptions tab lists exceptions (errors) users may have experienced while submitting a request via the web.

NOTE

Exceptions or errors are written back into Remedy when possible.

They are usually used during a support call or for your Administrator to troubleshoot problems.

- **Date, type, severity** and **description** areas are offered describing the exception (or error).



The exceptions tab also allows you to view and change the logging level on the Kinetic Survey or Kinetic Request web component. By changing this value, it changes which messages are actually logged in real time for your web component. This allows logging level changes without restarting your web server. Log files are accessible from your web server in the Kinetic Survey or Kinetic Request directory.

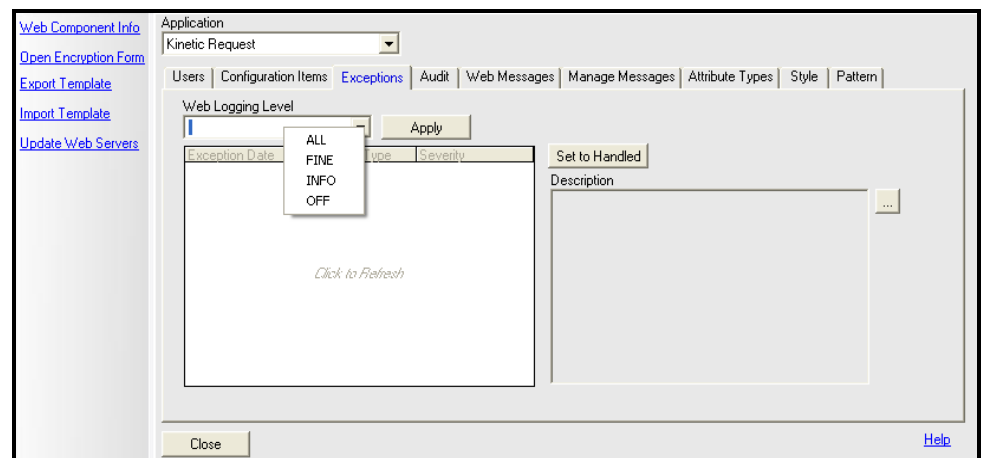


Figure 30: Web Logging Level Choices

THE AUDIT TAB

The Audit tab on the configuration manager allows you to view which survey or request templates that have been deleted and by whom.

VIEW AN AUDIT ITEM:

1. Highlight the survey or request item you want to look at.
2. Double-click on the request.

-Or-

Click the **View** button. The **Kinetic Audit** dialog displays for you to view the request.



Figure 31: Kinetic Audit Information

3. Click the **Close** button when you're done viewing the audit data.
4. Click the **Close** button on the **Security Console** dialog to end your session.

WEB MESSAGES TAB

The web messages tab displays the different error messages a user can see when submitting a survey or request. By default these messages are in English. These can be updated to include information more specific to your company.

Web Messages can also be locale-specific. By setting a locale for your messages (other than English) requests using that locale will display a message in the correct language for your customer.

MANAGE MESSAGES TAB

The Manage Messages tab offers Administrators the ability to view email messages that have not been sent out of the system (in pending status). Most often, the problem occurs because a message template has been incorrectly formatted.

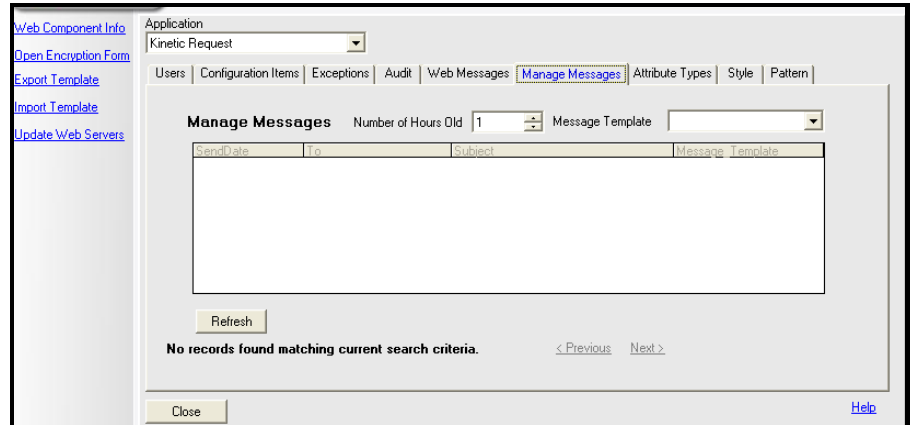


Figure 32: Manage Messages Tab

The **Message Template** drop-down list allows you to investigate where a delay may be occurring by viewing available message templates.

The **Number of Hours Old** box allows you to prioritize messages by the oldest "pending status", or by a particular group of delayed messages.

ATTRIBUTE TYPES TAB

The attribute types available to a survey, request, or service catalog can be added and modified from the **Attribute Types Tab**. Attribute Types show up on the Settings Tab of the survey or request or on the attributes tab of a service catalog.

Attributes are useful for attaching additional information to a template or catalog without having to add new fields or workflow. Such extensions could include items such as costing information, authors, owners, version information and more.

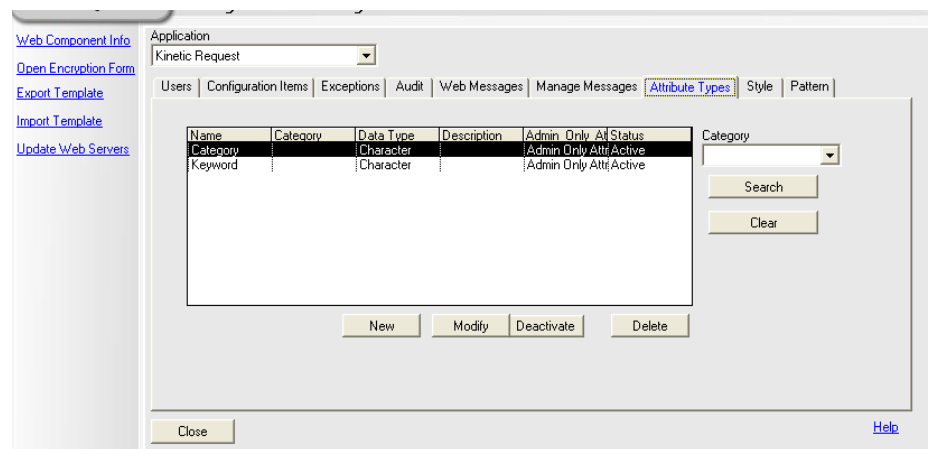


Figure 33: Attribute Types Tab

1. On the Configuration dialog "Attribute Types" tab, Click **New** or **Modify**. A dialog will appear.

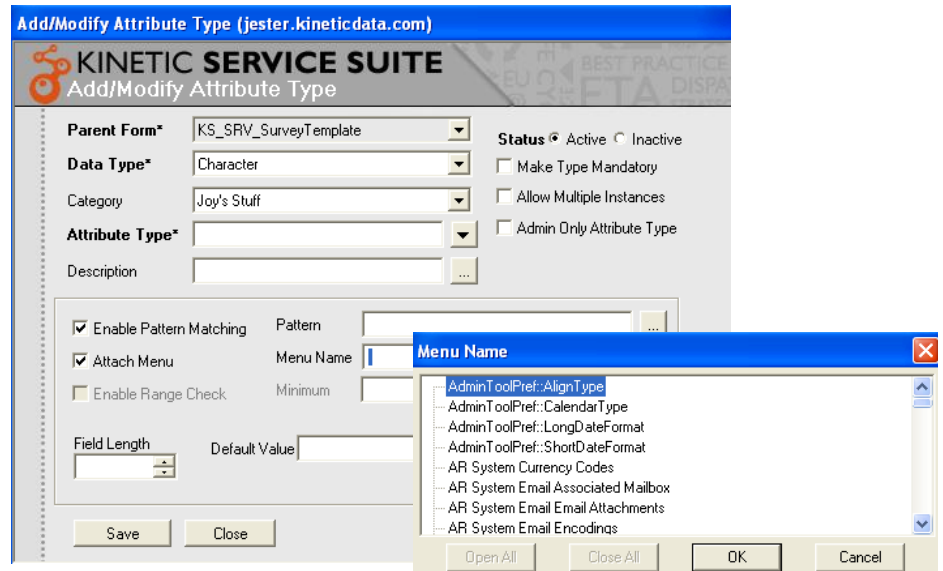


Figure 34: Add/Modify Attribute Type dialog

2. Choose **Parent Form**, either *KS_SRV_SurveyTemplate* for Survey or Service Items or *KS_RQT_ServiceCatalog_base* for service catalog attributes.
3. Choose **Data Type**. For example, if character is chosen as a **Data Type**, that choice enables the **Enable Pattern Matching** and **Attach Menu** checkboxes, offering a user more control over how request attribute can be adjusted and modified.

If you choose an **Integer** in the **Data Type**, the **Enable Range** checkbox becomes available. Enter a numerical range from **Minimum** to **Maximum**, **Field Length** and **Default Value**.

4. If a **Category** is set, the data type will only be available to survey or request templates with that Category. Leaving category blank will make the attribute available to all surveys or requests.
5. Click **Make Type Mandatory** if needed. This will require that an author fill in this attribute when saving a template.

NOTE: Mandatory attributes will only be required once a survey or request template becomes "Active".

6. Click **Allow Multiple Instances** for those circumstances when an author will need to add multiple values to this attribute type. An example is "Request Business Unit", where multiple values for a business unit would be entered such as: H.R., Request Business Unit IT, Request Business Unit, Marketing, etc.

Admin Only Attribute Type are reserved for Kinetic Survey or Kinetic Request “out of the box” attribute types such as expiration date.

7. **Enable Pattern Matching/Pattern** allow you to set a pattern that the attribute follows. These patterns use Remedy ARS Pattern syntax. See your administrator guide for available pattern types in Remedy.
8. If needed, choose from the **Menu Name** drop-down list, as shown above.
9. Choose **Save** and **Close**.

TIP:

Use the **Style Tab** to make changes for all new templates created.

Use **Page Editor** for any positioning changes or “element to element” level changes.

STYLE TAB

The **Style Tab** is used to manage the look and feel of your requests by displaying the Cascading Style Sheet (CSS) selectors used for any new templates. The styles added here will be cloned for every new template created.

The Kinetic Data product ships with pre-configured information offering basic layout styles for new surveys or requests including default fonts, padding and borders. Newly created templates will inherit all style information configured for the survey or request product but any style can be changed in the **Style Tab**.

Note: Any changes made to styles **will not** affect previously existing templates, only new templates from that point forward.

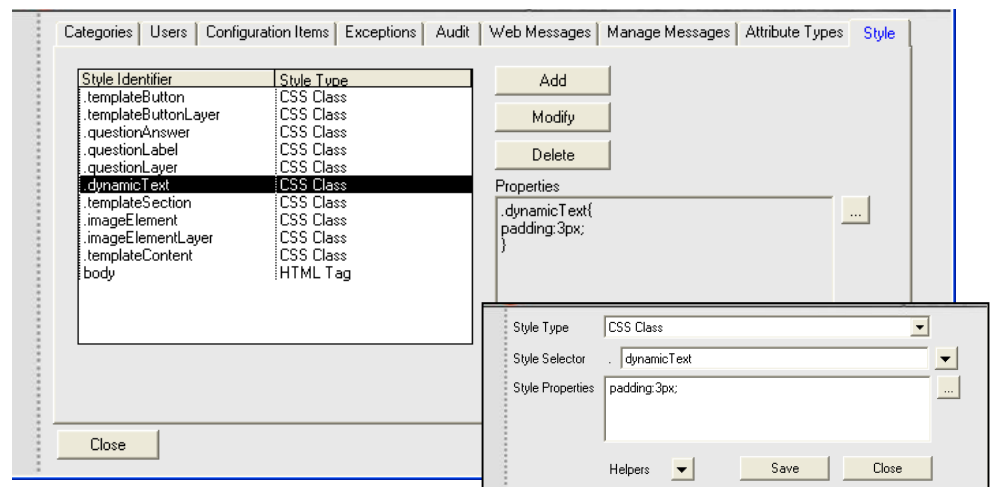


Figure 35: Configuration Manager, Style Tab

1. Click **Add** to create a new style.

Or

2. To make changes to an existing style, highlight the Style Identifier you want to change and click **Modify**. Use the drop-down menus and “Helpers”, or type-in changes for style type, selector and properties.
3. Click **Save** and **Close**.
4. To remove a style, click **Delete**.

See **Cascading Style Sheets-Predefined Styles (CSS)** in the User Manual for more information.

PATTERNS TAB

Patterns are used to restrict user input in to certain patterns to better control data entered into Kinetic Survey or Kinetic Request. Patterns can be used to restrict phone numbers to a certain format, IP addresses to certain range and more.

Kinetic SR uses standard Regular Expressions common to many programming languages to manage regular expressions. Writing a regular expression does involve some background knowledge, but there are many existing patterns online as well as tutorials to write your own.

Kinetic SR includes a number of predefined patterns which can be used immediately. Patterns defined here show can be selected on the “Validation” tab when creating a question.

TIP:

A single quote { ' } must be preceded by an escape character { \ }.

Figure 36:Pattern Tab (Add)

5. Choose from the drop-down menu, or type in a **Pattern Label**. This is what authors will see when adding a pattern to a question and should be descriptive.

6. Under the **Pattern** field type in a regular expression specific to the Pattern Label entered.
7. Regular pattern coding can be difficult to decipher. **Pattern Notes** is an opportunity to offer helpful information for a future Administrator or user regarding this pattern.
8. The **Defaults** field allows you to specify whether this pattern will automatically be selected when an author creates a question of this type. There should be only one **Default** response for each type of question. Typically "Defaults" is not used except for those included in your installation.