KI Systems, Inc.

Microsoft Certified Partner

KI Numbering Tool 2007
Installation & Overview

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Platform requirements - KI Numbering Tool 2007

Enterprise Version Requirements

The following software and hardware are required to execute KI Numbering Tool Enterprise Version:

The Enterprise Version of KI Numbering Tool is based on client-server architecture. The server software required is Microsoft SQL Server 2005. Microsoft provides minimum specifications for the hardware and software needed to run SQL server in your environment. MS specifications can be found here:

http://www.microsoft.com/sql/prodinfo/sysreqs/default.mspx

The Enterprise Version implements a custom database within the SQL Server Engine. This database can be implemented in a variety of configurations depending on the needs of the firm. The database can be implemented as follows:

- Running stand alone within an implementation of MS SQL Server
- Running as an additional database within an existing implementation of MS SQL Server
- Running stand alone within an instance of MS SQL Server
- Running as an additional database within an existing instance of MS SQL Server

Implementation methodology is driven by the preference of the firm and the workstations ability to communicate with the database.

Note: The database is merely a repository for Numbering Scheme data for the firm and individual users. The database is not transaction intensive. This repository simply requires drive space on the SQL Server and a minimum of connectivity memory. Generally firms implement this database on top of Accounting or Document Management System database servers. Connection allocation and drive space being the determining factors of placement.

Memory and Drive Space Requirements:

In addition to the memory requirements of MS SQL Server, memory requirements may be calculated as 2KB per connection.

In addition to the drive space requirements of MS SQL Server, the application requires approximately 100 MB of free drive space for installation.

Enterprise Version Supported Databases

KI Numbering Tool has been tested with the following database versions:

Microsoft SQL Server 2005 Editions*
** Mobile Edition is not yet approved*

Enterprise Version Supported Connectivity Drivers Network

Numbering Tool is a COM add-in for Office 2007. Database connectivity to the Microsoft SQL Server is provided via ADO/XML. Workstations connecting to the Microsoft SQL Server database require a minimum of Microsoft Data Access Components (MDAC) 2.8 or higher.

Enterprise Version

Remote: Database Format

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The Remote Version provides stand alone or completely disconnected access from the network and servers. This product provides storage of numbering schemes within a Microsoft Access database located on the workstation. The Remote Version also includes a desktop application that provides synchronization of Public and Private Numbering Scheme data between the network SQL Server database and the local workstation. The desktop application also provides automatic switching between connectivity drivers for network and remote database access.

Remote: Supported Connectivity Drivers

The local Microsoft Access database and requires a minimum of JET 4.0 SP 8. For Workstations running Windows XP we recommend an upgrade to JET 4.0 SP8.

Note: Microsoft no longer bundles updates to Jet/ODBC drivers within Microsoft Data Access Components (MDAC) updates. For those workstation using the Remote Version database Jet/ODBC driver updates must be done in addition to traditional MDAC updates.

Standard Version and Demo Version

Database Requirements

None

Both the Standard version and Demo Version implements the storage of numbering scheme data within the user's registry and does not require database storage.

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Client Requirements

Operating System Requirements – Enterprise Version

The following software and hardware are required to install KI Numbering Tool:

- Windows Vista, Windows XP Professional SP2
- Microsoft MDAC 2.8 or higher
- Microsoft JET 4.0 SP8 or higher
- TCP/IP Networking Protocol
- 15 MB of free disk space

Operating System Requirements –Standard and Demo Versions

The following software and hardware are required to install KI Numbering Tool:

- Windows Vista, Windows XP Professional SP2
- 15 MB of free disk space

Compatibility – Microsoft Office 2007

KI Numbering Tool 2007 Demo, Standard and Enterprise versions are specifically developed for use with Microsoft Office 2007. All other versions of Office are not supported with this release.

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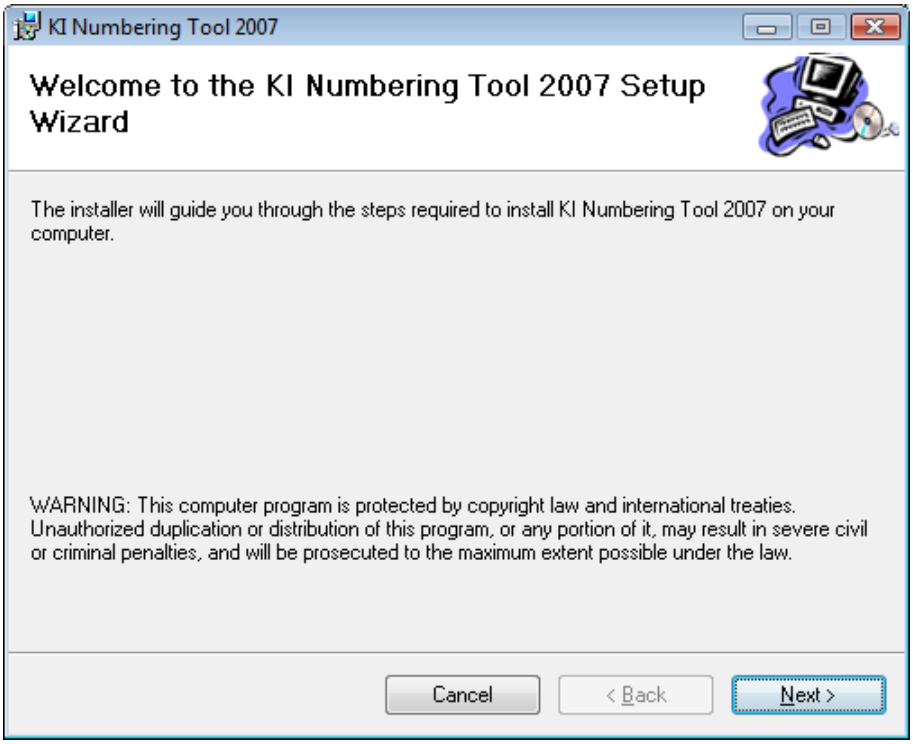
Installing KI Numbering Tool 2007

- Run the KINum12Setup installation file – this may be on the CD provided, or in a compressed archive (.zip). Please extract the contents if a .zip files before running the setup program.
- Please close any Microsoft Office applications prior to beginning the installation of the KI Numbering Tool 2007.
- The following is an overview of the installation process.



- Click Next to begin installation.

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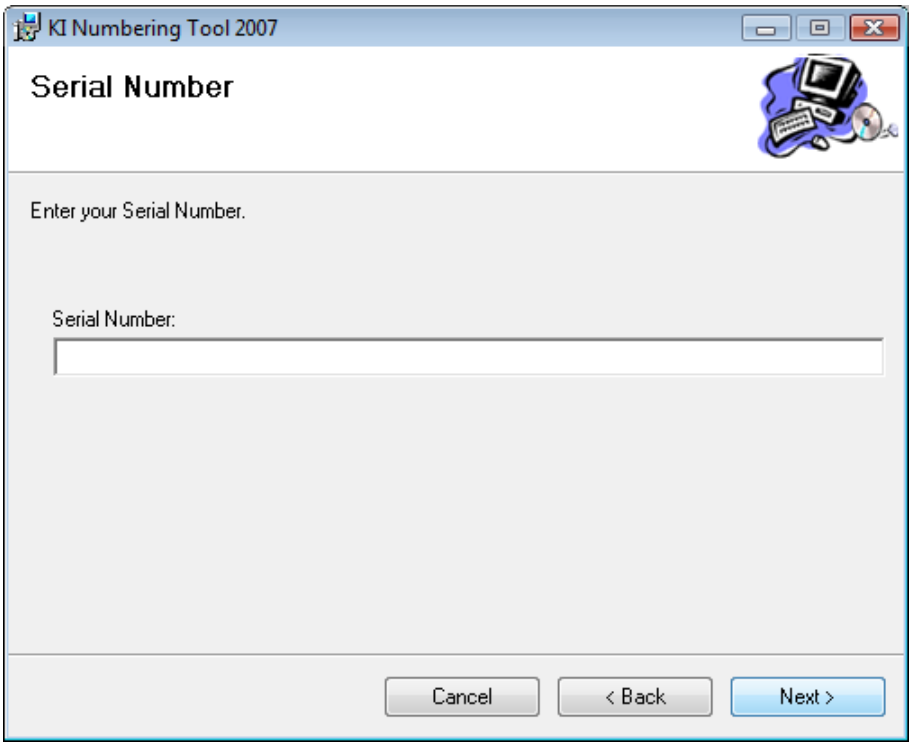
- The following dialog will appear:

- Review the terms and conditions of the License Agreement – if you agree indicate by clicking the I Agree button then click Next to continue.
- Please enter your software license Serial Number in the space provided.



NOTE: Your Serial Number can be found on the CD in the file Notes.txt, or in the .zip archive in the Notes.txt file. If you have received a 30-Day Demo version the software will expire on the 31st day following installation. Locate and enter the serial number provided.

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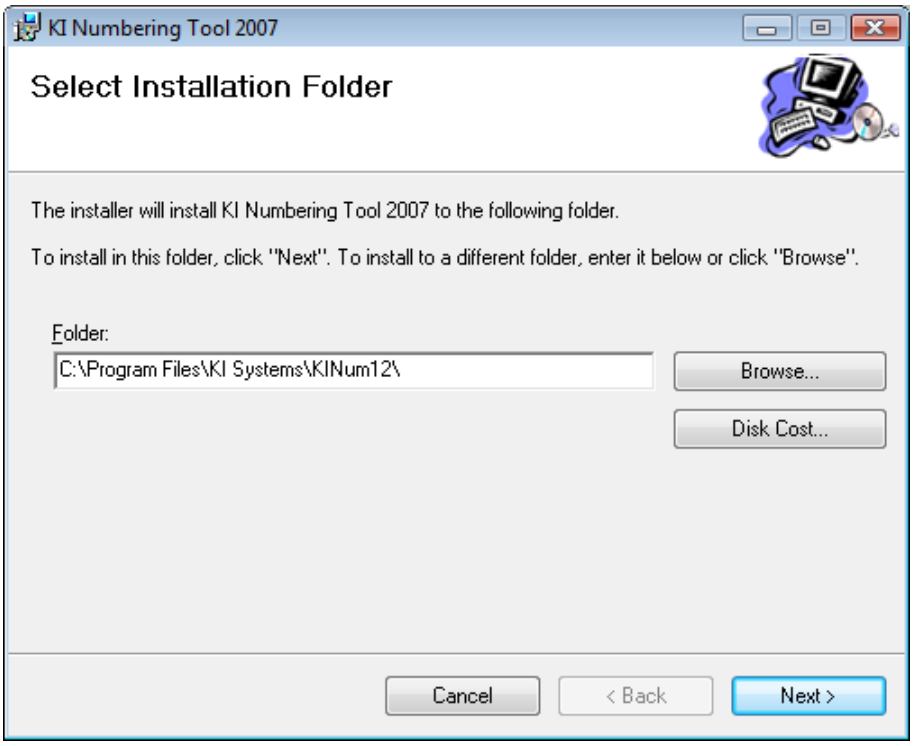
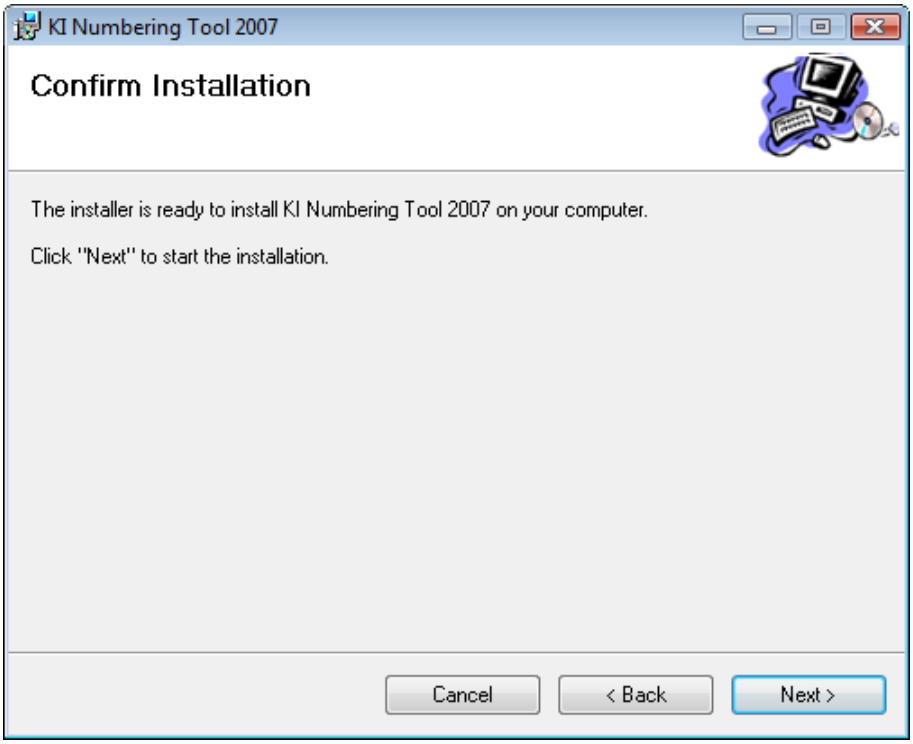
- The following dialog will appear:



- Use the default installation folder or Browse to choose an alternate location.
- Confirm the installation by clicking Next:



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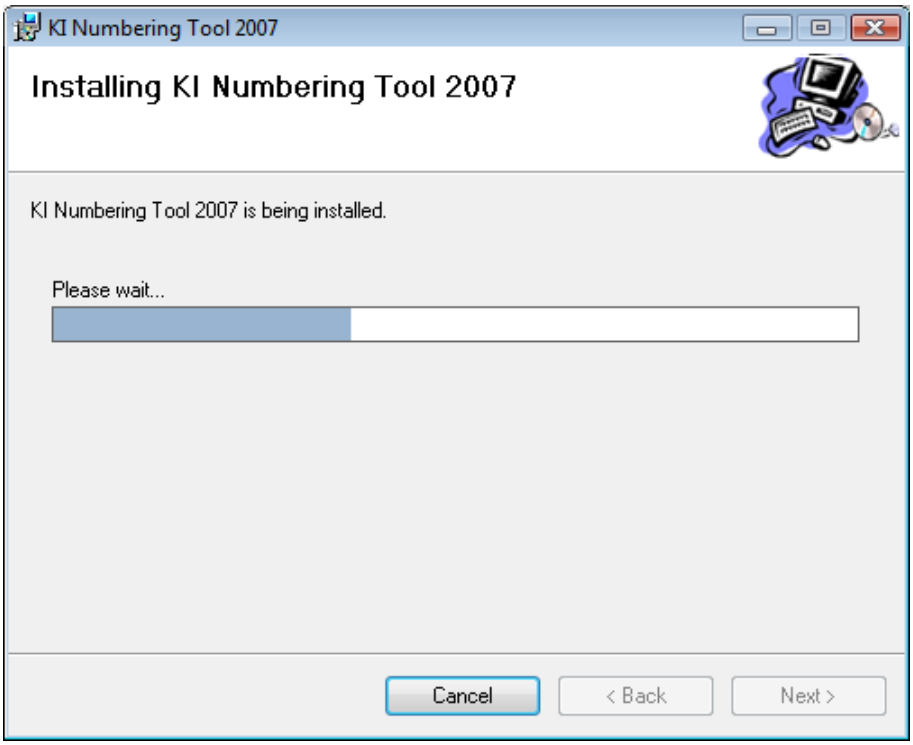
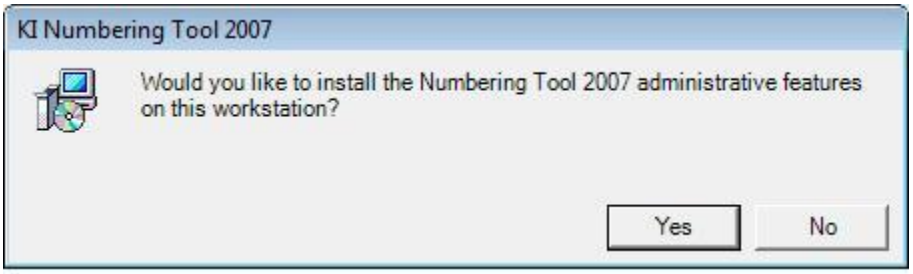
- Installation progress:



- If you have purchased the Enterprise Version of the KI Numbering Tool, you will be prompted to install Administrative Tools on the workstation. See below:



- Administrative Tools allow you to Add, Edit and Delete the firm's Public Schemes from this workstation. Administrative Tools should only be installed on user workstations that have permission to modify the firm's Public Schemes.

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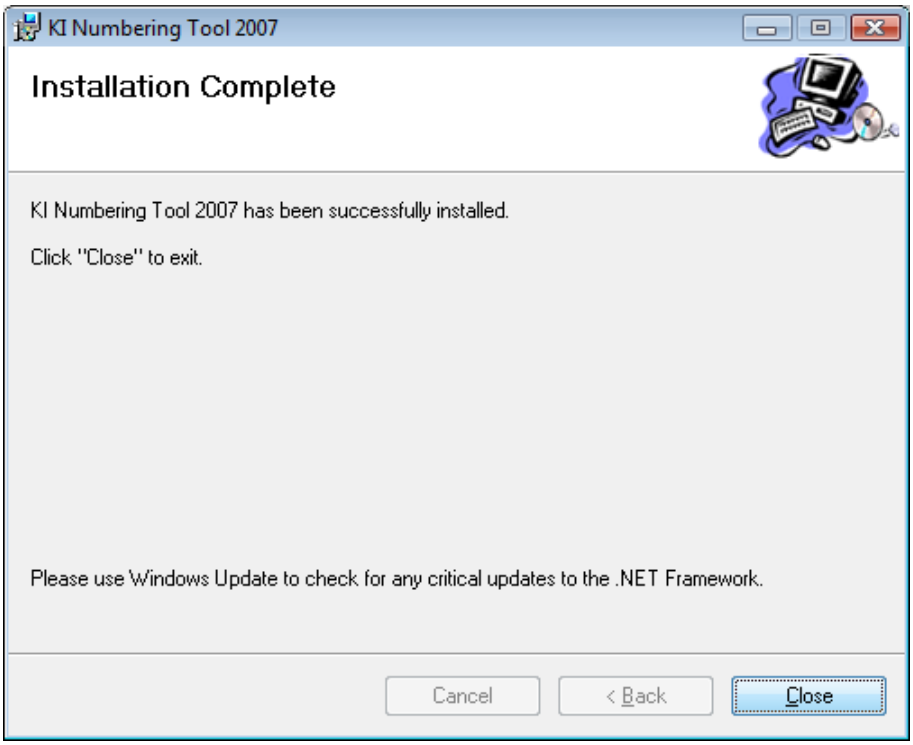
- Installation complete:



- Click Close to finish the installation.
- You may now use the software.

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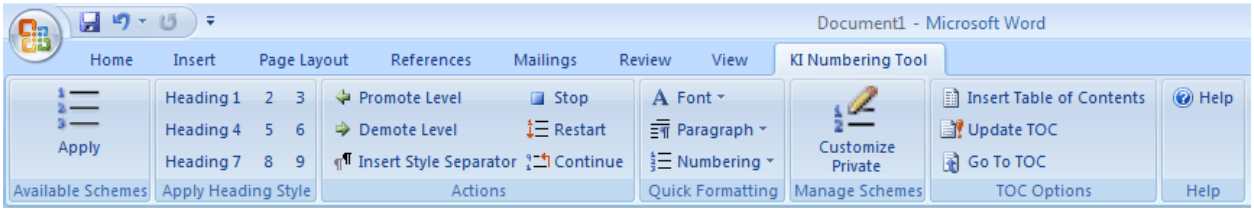
Accessing KI Numbering Tool 2007 from the Ribbon

- Open Microsoft Word 2007.
- From the ribbon select the KI Numbering Tool tab to access it's features



"How to" assistance for using the KI Numbering Tool 2007

A comprehensive "How To" help file is included with the KI Numbering Tool 2007. The help file provides step by step instructions on using each feature of the numbering tool.

You may also visit our on-line support site @ http://www.kisys.com/Documentation_Login.htm. Please note: access to On-line Tech Notes, Documentation, Downloads, Tips & Tricks and Technical support requires user registration for an On-line ID. The On-line ID is free and provides you with a unique user login and password.

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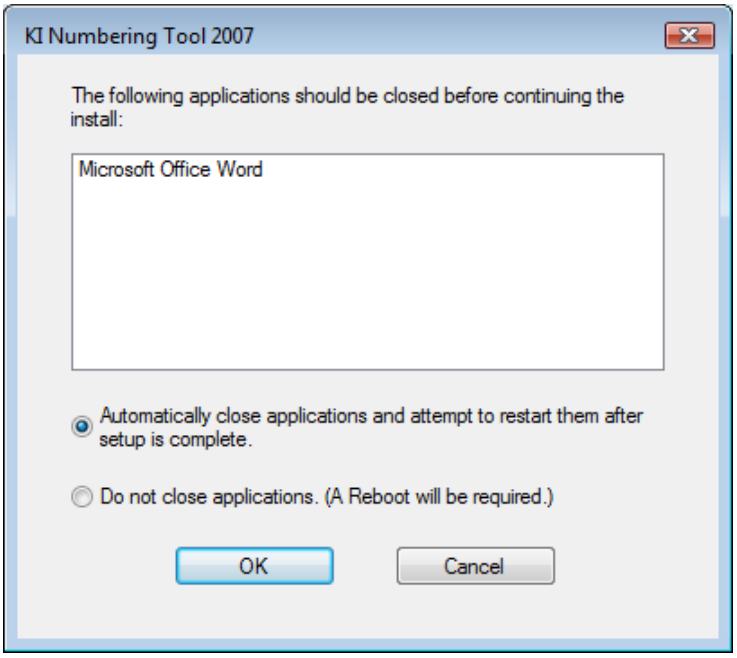
Maintenance & Removal – KI Numbering Tool 2007

- Click Start, Control Panel, Programs & Features
- Locate KI Numbering Tool 2007
- Choose Un-install, Change, or Repair
- Please close Word prior to removing the KI Numbering Tool 2007. If Word is open you will be prompted to close (Save your work) it before continuing



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