

ZAVANTA Administrator and Author Installation (SQL Database)

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ZAVANTA Installation Overview

Customer Support Instructions

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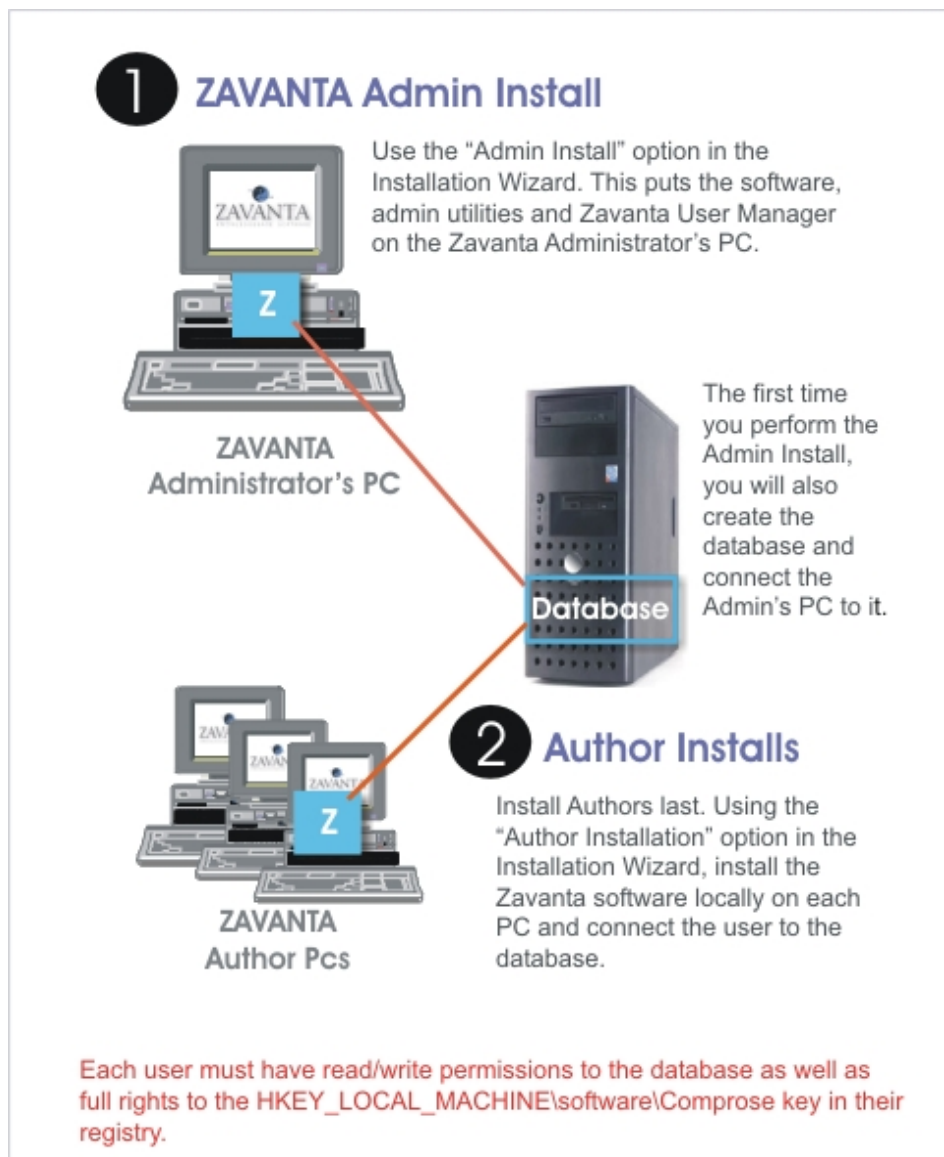
Last Updated: 06/25/2014

Status: Approved and Released

General Description

Description: This overview explains the process for properly installing Zavanta in your organization. You can download the software from our Customer Support website:

<http://www.comprose.com/customerlogin.html> (You will need your serial number to log in.)



NOTE: If you will be implementing Zavanta's Active Directory integration, there are a few extra steps you will need to perform. See: '[Zavanta's Active Directory Integration](#)'

Who Performs: Network Administrator (SQL Administrator for SQL installs)
Zavanta Administrator

Requirements

Approvals: All Zavanta Authors and Administrators must have:

Read/Write access to:

Registry key: HKEY_LOCAL_MACHINE\software\Compose
C:\Program Files\Compose\Zavanta\EXEFiles\Temp
C:\Program Files\Compose\Zavanta\EXEFiles\WebTemp
Zavanta database on the server

Read access to:

HKEY_CLASSES_ROOT

For SQL installations, the SQL Server Administrator must have full rights to the server including select, update access and rights to create a database.

Pre-Knowledge: Before performing this task you must know ...

Server name and folder location where the Zavanta database will reside.

Basics of how to install Zavanta and get the latest version

Type of database install (Access or SQL)

Specific Knowledge:

Zavanta **serial number** and **module codes**. Refer to the "Zavanta Registration Codes" form provided at the time of licensing for these codes.

Understand the minimum system requirements. See Equipment section later in this document.

Definitions: SQL Server Administrator

The IT person who is knowledgeable about SQL Server and who has full rights to SQL Server (creation, modification, utilities, etc.)

Zavanta Administrator

The "lead" application user who will need full access to all Zavanta utilities. This user usually also has the responsibility of setting passwords and user names for all other users (Authors) of Zavanta.

Zavanta Author

Users (subject matter experts) throughout the organization who will use Zavanta to create various types of content, but who do not need to perform Administrative functions.

Equipment: Minimum system requirements

Space on a server for the database

Space on a server for the generated website

Keep in mind that **ONLY** the Zavanta database will reside on the server; no software is installed there. You do not need a dedicated server, the Zavanta database can reside on any server.

System Requirements

Administrator and Author/Reviewer/Approver Workstations:

Microsoft Windows 2000/XP/Vista/Windows 7/Windows 8.x. 150MB minimum hard drive space. 512 RAM recommended. 100 MHz processor or above. Microsoft Internet Explorer 5.5

or above required for all operating systems.

Users will need full rights to the registry key: HKEY_LOCAL_MACHINE\software\Comprose.

NOTE: If you are using a MAC, you will need to install a Windows emulator.

Network Licenses:

Server Operating System: Microsoft Windows Server 2000/2003, 2008, 2012. Zavanta also runs in Hyper-V and VMware ESX virtualization environments.

Server hardware: min. 200 MHz Pentium processor; 1GB RAM. Zavanta runs on clustered servers.

Network: TCP/IP, minimum. 100Mbps. (ZAVANTA is not intended to run over a wide area network. If you have remote users, we recommend Citrix, Terminal Services / Remote Desktop Services, or using other remote access software products. (You can also utilize ZAVANTA's check in / check out utilities.)

SQL databases only:

SQL (SQL database Installations only): SQL Server v2000 and later including SQL 2012, SQL Express on the server where the ZAVANTA database is installed. Minimum recommendations for the system core of the SQL Server: 1GHZ dual processor; 2GB RAM; SCSI Raid Array (min 50 GB) (Zavanta is not compatible with My SQL)

Website Publishing: If you will be publishing a website to a central server / intranet / MS SharePoint drive, you will need to allocate space and give all viewers access to the central location where the website(s) is published. This is external to the ZAVANTA application. Viewers can access the website(s) using any standard browser. Zavanta websites are compatible with any version of MS SharePoint. Zavanta's website does not come with a search engine, but the website is compatible with any standard search engine that you use for other content. If you do not have a search engine, please contact our support for recommendations.

NOTE: You can also FTP the website to your ISP.

Email Systems supported for Automated Actions:

Access to SMTP Server (Authentication Supported but not required)

Active Directory Integration

If you have the Gold Edition, you can integrate Zavanta with Microsoft's® Active Directory®

Materials: List of Zavanta Authors/Reviewers/Approver users to install
Zavanta installation instructions
Zavanta Installation Software (setup file)
Zavanta Serial Number and Module Codes

You can download the complete Installation Guide and latest software from our Customer Support website. (You will need your serial number to log in.)

Warnings and Precautions

Precautions: To avoid errors do the following before performing this task:

Make sure that the workstation and server meet the minimum hardware/software requirements.

If you are installing the Windows 2000/XP version and you have Zavanta trialware installed on the PC, you will need to uninstall it. Only one instance of Zavanta may reside on any given workstation. The Vista/Windows 7/Windows 8 installation automatically uninstalls the Zavanta trialware.

Detailed Steps

- 1 Assemble required materials.

- 2 Perform the Administrator Installation.

How to Do:

The Administrator and Author installations are identical except that the Administrator installation includes the utilities you can access outside of Zavanta as well as the User Manager.

- For SQL Databases. See: '[ZAVANTA Administrator Install - SQL Databases](#)'
- For Access Databases. See: '[ZAVANTA Administrator Install - Access Databases](#)'

- 3 Perform the Author Installations. See: '[ZAVANTA Author Workstation Installation - SQL and Access](#)'

How to Do:

The Author installation is identical to the Administrator installation except that it doesn't include installation of the User Manager. This installation is also needed if you have the Gold Edition and your Reviewers and Approvers will be using Zavanta.

- 4 (Optional) Integrate Zavanta with Active Directory See: '[Zavanta's Active Directory Integration](#)'

Troubleshooting

How to get help: Refer to Frequently Asked Questions on the User Support Site

FAQs are available at our Customer Support website: <http://www.comprose.com>. Click on the Customer Login link. Log on to the support site using your Zavanta serial number.

You can contact COMPROSE Technical Support.

- Email: support@comprose.com
- Phone: 1-800-719-8964

ZAVANTA Administrator Install - SQL Databases

Customer Support Instructions

Doc Number: TechSup-2007

Document Owner: Technical Support

Author: Technical Support

Rev #: v2.4

Last Updated: 03/02/2014

Status: Approved and Released

General Description

Description: This document covers the instructions for a new Zavanta installation -- installing Zavanta on the Administrator's PC, creating the SQL database, and connecting to the database plus setup tasks. If you want to save your trialware data, this procedure includes those steps as well.

During the Zavanta Administrator installation, the Installation Wizard will install the Zavanta software on the Zavanta's Administrator's PC. The Administrator install is similar to Author installs except that it installs ALL features including the User Manager and Data Creation utilities.

IMPORTANT: Zavanta Administrator software is NOT installed directly on the server. It is installed locally on the workstation which the Zavanta Administrator will use. Only the database resides on the server.

Who Performs: SQL Server / Network Administrator
Zavanta Administrator

A SQL Administrator **who has full rights** should perform the first Administrator install as well as create, connect, and test the Zavanta Administrator's PC connection to the SQL database. After the initial installation and test is completed, the Zavanta Administrator or anyone you appoint can perform the remaining setup tasks and perform the Author workstation installations.

When to Perform: At time of installation (New Customers)
To setup additional Zavanta Administrator workstations (existing customers)

New Customers: The **first** workstation installed should *always* be an Administrator workstation. You will need to create the database as well.

Requirements

Approvals: All Zavanta Authors and Administrators must have:

Read/Write access to:

Registry key: HKEY_LOCAL_MACHINE\software\Comprose
C:\Program Files\Comprose\Zavanta\EXEFiles\Temp
C:\Program Files\Comprose\Zavanta\EXEFiles\WebTemp
Zavanta database on the server

Read access to:

HKEY_CLASSES_ROOT

Pre-Knowledge: Before performing this task you must know ...

The server name and folder location where the Zavanta database will reside
Name of the database

Equipment: Server space for the SQL database
Space / location for the exported website
Zavanta Administrator's PC

The database does not need its own dedicated server, it can reside on a server that has other applications on it.

The website that will be generated out of Zavanta can reside anywhere you want, just so employees have access to it.

Materials: List of Zavanta users to install
Zavanta installation instructions
Zavanta serial number and module codes

You can download the Zavanta installation software and access technical information by logging on to the Customer Service website at: <http://www.comprose.com/customerlogin.html>

If you want to keep the data that you've used in the Zavanta trialware you will need to enter the new serial number into trialware and save the database (Access mdb) file. See Step 1 in the detailed steps.

Warnings and Precautions

Precautions: To avoid errors do the following before performing this task:
Have the proper permissions and rights
Read all instructions; do not skip any steps

The first time you logon after installation your username will be Administrator and your password will be blank. You'll set your password in the User Manager after you've logged on.

Detailed Steps

1 Keep trialware data?

- **No. Go to Step 2.**
- **Yes, follow the instructions below.**

How to Do:

You will need to enter your new serial number into your trialware first, then save your database (mdb file) in a safe place.

1.1 Launch Zavanta Trialware

If an Error Occurs:

If your trialware is expired, enter this extension code: 374KYYK and press the "Extend Trialware" button.

1.2 Open menu Admin/Setup->Modules Activation

1.3 Enter your new Zavanta Serial Number

1.4 Answer no to the next prompt

1.5 Close Zavanta Trialware

1.6 Back up your Trialware Access database and move it to a temporary folder for save keeping.

How to Do:

This file is located in C:\Program Files\Comprose\Zavanta\Database on the machine with
Zavanta trialware installed.

Result:

Your data will be saved in the mdb file that you will connect to later.

1.7 Uninstall Zavanta Trialware in Windows Control Panel

2 Install Zavanta software on the Zavanta Administrator's PC. (Installation Wizard)

2.1 Log on to the Zavanta Administrator's PC.

2.2 Download the setup file to the PC.

How to Do:

Go to <http://www.comprose.com/customerlogin.html>

Click on "Log in to User Support Site"

Enter your serial number.

Click on the "Download Software and Instructions" link.

Click on the Zavanta version you want to install.

Click Save.

Select a folder to save the file to. The zip folder will be saved to that location.

Result:

The download process begins and may take awhile.

2.3 Locate the zip folder and double-click on it.

Result:

You will see the Zavantasetup.exe file.

2.4 Run the Zavantasetup.exe file.

How to Do:

Double-click the Zavantasetupxx.exe file or select Run from the Windows START menu, browse to the setup.exe file and select OK. (xx=the current version, i.e.4.1)

Result:

The Zavanta Installation Wizard starts. The wizard will walk you through the install process.

2.5 Read and accept the Zavanta License Agreement. Press Accept.

Result:

You will see the Customer Information screen.

2.6 Enter the user name, organization and serial number.

Result:

You will see the Destination Folder screen.

2.7 Select the folder on the PC to copy the Zavanta program files to.

How to Do:

Do not install the software on the server. Unless you have a specific reason for changing the folder locations, simply accept the default folder shown.

Result:

You will see the Database Screen.

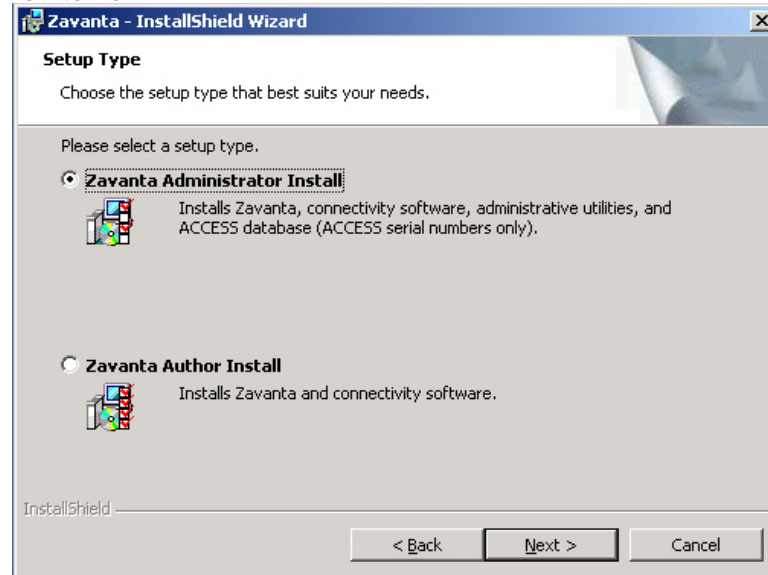
2.8 Skip the "Database folder" screen. (applies to Access installs only). Press Next.

Result:

The Setup Type screen displays.

2.9 Select "Install Zavanta Administrator" option. Press Next.

How to Do:



Result:

You will see a confirmation screen and then a progress screen. When the process is completed, the main program files and utilities are installed.

2.10 Press Finish.

2.11 Reboot the PC if prompted.

Special Warnings:

- If you are a new customer, the installation will automatically contain the latest Zavanta version.
- If you are re-installing Zavanta or are possibly using an old setup file, you will want to make sure you have the most current version. If you are installing v3.x or earlier, you can run the Update Manager. If you are installing v4.1.x (Windows 7 or Vista) the Update Manager is not available. Go to the customer support site to check the current version and download it.

3 Create the SQL Database. (Data Creation Wizard)

3.1 Go to the Windows START menu =>Programs =>Zavanta=>Utilities=>Data Creation Wizard.

Result:

You will see the Zavanta Database Creation Wizard screen.

3.2 Press Next.

Result:

The Choose a Data Source screen will display.

3.3 Complete the data source information. Press Next.

How to Do:

Type the name of the SQL server where the Zavanta SQL database will reside.

Result:

You will see the Authentication screen.

3.4 Select the authentication type. Press Next.

How to Do:

You can select the default, Windows, or a standard SQL authentication, which requires you to enter a username and password. We recommend keeping the default Windows setting.

Result:

You will see the SQL Server Creation Settings screen.

3.5 Importing Trialware Data?

► **Yes, complete the following instructions**

3.5.1 Enter database name

3.5.2 Check the option "Import data from an existing Access database"

3.5.3 Press Next

3.5.4 When prompted select the trialware database file

How to Do:

The wizard will prompt you to browse to your existing Zavanta.mdb trialware database file and will automatically import all the data into the newly created SQL database. Select the file that you backed up in the previous steps.

► **No, complete the settings screen. Press Next.**

How to Do:

For first time installations, type a unique name for the database (i.e. Zavanta). If you have previously installed Zavanta, type in the name of your existing database.

Result:

You will see the Database Creation Successful screen.

3.6 Press Finish.

Result:

The database will contain our default data and samples.

4 Connect the Zavanta Administrator's PC to the Zavanta database. (Connection Wizard)

How to Do:

Now that the database has been created, you will need to connect to it. (You will need to do this on the Administrator's PC as well as later for client (author/SMEs') PCs.

4.1 Go to the Windows START menu => Programs => Zavanta => Connection Wizard.

Result:

The first screen of Zavanta's Connection Wizard displays.

4.2 Enter the name of the Server where the Zavanta database was created.

4.3 Set the SQL authentication.

How to Do:

We recommend keeping the default, Windows.

4.4 Select the database you just created from the drop-down list.

Result:

You will see message "Database Connection Successful".

If an Error Occurs:

Contact your SQL Administrator and make sure you have

- the correct server name
- the correct database name
- full rights and permissions

4.5 Press Finish.

5 Enter the serial number and module codes in Zavanta.

How to Do:

At this point the PC is connected to the database, but you will need to enter the serial number in the Zavanta application as well as the module codes.

5.1 Launch Zavanta.

How to Do:

Start Zavanta by selecting "Zavanta" from **Start=>Programs=>Zavanta** or by clicking on the Zavanta icon on your desktop. When you see the login window, enter the user name for this workstation. If you have not yet entered any user names, **you may log in as username ADMINISTRATOR and leave the password blank.**

5.2 Go to the Admin/Setup Main Menu=> Modules Activation.

5.3 Enter the serial number.

Result:

The serial number will be recorded in the PC's registry.

Special Warnings:

The serial number **must match** the serial number in the SQL database.

5.4 Enter the module codes. (not Gold).

How to Do:

- Enter the web code (this will turn on the web automation features).
- If you have purchased the Content Overlay Designer you will enter a code to enable that module.
- We recommend not entering your Gold activation code at this point. Doing so will cause certain Program Functions to be inaccessible to end users. **You may want to run Zavanta for awhile will no security in place.** Enter your Gold code after you have read the Gold Security White Paper (or have taken the class) and understand the impact on users.

5.5 Press Activate.

6 Doublecheck that the serial number and module codes are still correct. (DO NOT SKIP)

6.1 Launch Zavanta.

6.2 Go to the Admin/Setup Main Menu => Modules Activation.

6.3 Check that the serial number and modules codes are correct.

6.4 Exit Zavanta.

7 Give the Zavanta Administrator and authors the proper permissions.

How to Do:

The Administrator as well as all client PCs for authors/SMEs must have proper permissions. **If users do not have the proper permissions, they will not be able to log onto Zavanta.**

7.1 Get the list of Zavanta authors/SMEs.

7.2 Give the Zavanta Administrator and all authors permissions/authentication to the SQL database.

How to Do:

Using SQL Server Enterprise Manager, make sure all Zavanta authors and administrators have the below permissions to the Zavanta SQL Server database.

- Datareader
- Datawriter
- Public

7.3 Create a "default graphics folder" on the network and grant user rights.

How to Do:

The "default graphics folder" is a common-access folder where all Authors and Managers will store graphic files and other objects which will be linked or attached in the Zavanta database. Use of a common network folder ensures that all users with rights can print and export documents with graphic attachments.

All Zavanta users must be given full rights and have the same mapped drive letter to this folder.

8 Test launching Zavanta by logging on as the actual Zavanta Administrator. (DO NOT SKIP).

How to Do:

If you are a SQL or Network Administrator, you typically have full rights that end users don't. To avoid later problems, make sure that users can log on using their own logon.

Login as that actual user or have the Zavanta Administrator log in to their workstation using their own ID. When you see the first Zavanta login window, enter the user name for this workstation. **If you have not yet entered any user names, you may log in as username ADMINISTRATOR and leave the password blank.**

***** Administrator Installation is complete. *****

9 Include the Zavanta database in your nightly backup routine.

10 Notify the Zavanta Administrator that the initial installation is complete.

11 (Optional here) Perform a second backup Zavanta Administrator install and connect to the database.

How to Do:

We highly recommend that you have a backup Zavanta Administrator. That way, in case the primary Administrator is unavailable, a second person can perform Administrator tasks. You only need to install the software (using the "Install Administrators" option) and connect their workstation to the Zavanta database on the server. You do not need to create the database, since it was created with the first Admin install.

NEW CUSTOMERS: Perform remaining implementation steps.

How to Do:

After the initial installation is completed, you can have either the IT/SQL Administrator or the Zavanta Administrator perform the remaining steps.

1. Add Zavanta users (Zavanta User Manager).

How to Do:

Before users can launch Zavanta, you will need to add the users to Zavanta's User Manager. Refer to Zavanta Online Help (User Management) for more details about the various features and settings in the User Manager.

Special Warnings:

Each user entered in the Zavanta User Manager **must also have correct permissions to the SQL database (datareader, datawriter, public)**

1.1 Go to the Windows START menu=> Programs=>Zavanta=>Utilities=> User Manager.

1.2 Enter the Zavanta Administrator username and password.

How to Do:

If you have not yet entered any user names or passwords, you may log in as username ADMINISTRATOR and leave the password blank.

1.3 Add each user.

How to Do:

Select the menu option: Action=>Add new user. Enter a user name, for example: John Doe. You may also assign a password for this user on this screen. Press OK.

1.4 Press the Close button when all users have been added.

1.5 Exit User Manager.

2. (Optional here). Set the default graphics folder. (Zavanta General Preferences).

How to Do:

The Graphics holding folder is a common access folder where all users will store graphic files and other objects which will be linked or attached in the Zavanta database. If your IT staff has created this folder and set rights, you need to set the folder preference in Zavanta.

2.1 Start Zavanta.

2.2 On the Main Menu go to Admin/Setup=>General Preferences

2.3 Click on the "Graphics/Hyperlinks" tab.

2.4 Select the folder you just created as the "Default graphics folder".

2.5 Exit Zavanta.

Troubleshooting

- Common Problems:**
- If the installation has been performed using a different logon than the user's logon, make sure the actual user can launch Zavanta and has full rights. To test, have the user log in to their PC using their own profile and launch Zavanta. If they get an error, this typically means that they either don't have the proper permissions or a control that Zavanta needs did not get registered properly.
 - If you get the message "**Database not found**" make sure you enter the correct server name and spell it correctly.
 - If you get any **ODBC error message**, you may need to update your drivers. The suggested MDAC refresh can be downloaded from Microsoft's website.
 - If you get the message: "**Registry: Access denied**" check that you have proper access to the key: **HKEY_LOCAL_MACHINE\software\Comprose** in the registry.
 - **Make sure you have latest Zavanta version.** If you have previously installed Zavanta or downloaded the setup file, make sure you have a most recent version. If you are installing v3.x or earlier you can run the Update Manager to download the latest version. For v4.1.x and later the Update Manager is not available. Visit the Customer Support website FAQs to check the latest version.
 - If you have attempted to use the trialware data and get an error message, the serial number in the PCs registry may not match the serial number in the database. Refer to the following procedure for troubleshooting steps: See: '[Trialware Screen or Serial Number Problem during a New Installation](#)'

How to get help: Note at what step in the instructions you were on with you got the error. Also note any error messages.

FAQs are available at our Customer Support website: <http://www.comprose.com>. Click on the Customer Login link. Log on to the support site using your Zavanta serial number.

You can contact COMPROSE Technical Support.

- Email: support@comprose.com
- Phone: 1-800-719-8964

ZAVANTA Author Workstation Installation - SQL and Access

Customer Support Instructions

Doc Number: TechSup-0072

Document Owner: Technical Support

Author: Technical Support

Rev #: v2.1

Last Updated: 06/25/2014

Status: Approved and Released

General Description

Description: This document provides instructions for installing Zavanta Authors and Reviewers/Approvers (Gold Edition). The procedure for SQL vs. Access is virtually identical with the exception that a SQL setup requires that you connect the author's PC to the SQL database.

NOTE: The Zavanta Administrator(s) uses a different procedure.

Who Performs: Authorized Zavanta users

After an Administrator workstation has been installed, non-administrative users can use this procedure to install Zavanta on their workstations.

When to Perform: When you want to add new authors

At least one Administrative workstation must be installed and the database created on the network prior to performing author installs.

Requirements

Approvals: All Zavanta Authors must have:

Read/Write access to:

Registry key: HKEY_LOCAL_MACHINE\software\Comprose
C:\Program Files\Comprose\Zavanta\EXEFiles\Temp
C:\Program Files\Comprose\Zavanta\EXEFiles\WebTemp
Zavanta database on the server

Read access to:

HKEY_CLASSES_ROOT

Pre-Knowledge: Before performing this task you must know ...

Zavanta username and password (defined in User Manager)
(Access installs) The network folder where the Access Database resides
(SQL installs) The server name where the Zavanta database resides
(SQL installs) The Authentication method used by your SQL database
(SQL Installs) Name of Zavanta SQL database

Materials: List of Zavanta users to install
Zavanta Installation Instructions

You can download the installation instructions and software from our Customer Support website:
<http://www.comprose.com/customerlogin.html> (You will need your serial number to log in.)

Detailed Steps

1 Install the Zavanta software on the author's or reviewer's/approver's PC. (Installation Wizard)

1.1 Log on to the user's PC.

1.2 Download the setup file to the PC.

How to Do:

Go to <http://www.comprose.com/customerlogin.html>

Click on "Log in to User Support Site"

Enter your serial number.

Click on the "Download Software and Instructions" link.

Click on the Zavanta version you want to install.

Click Save.

Select a folder to save the file to. The zip folder will be saved to that location.

Result:

The download process begins and may take awhile.

1.3 Locate the zip folder and double-click on it.

Result:

You will see the Zavantasetup.exe file.

1.4 Run the Zavantasetup.exe file.

How to Do:

Double-click on the file or select Run from the Start menu, browse for the exe file and select OK.

Result:

The Zavanta Installation Wizard starts. The wizard will walk you through the install process.

1.5 Read the Zavanta License Agreement. Press Accept.

Result:

You will see the Customer Information screen.

1.6 Enter the user name, organization, and serial number.

Result:

You will see the Destination Folder screen.

1.7 Select the folder on the PC to copy the Zavanta program files to.

How to Do:

Unless you have a specific reason for changing the folder locations, simply accept the default folder shown.

Result:

You will see the Database screen.

1.8 (Access Databases only) Set the Database folder.

► For Access Installations

How to Do:

Press the **Change** button on the dialog and then press Next to continue with the Wizard. Browse to the network folder where the Access database resides Then press OK.

If an Error Occurs:

If you do not know the location of the Access database or do not have security rights to the folder, contact your Zavanta System Administrator for assistance.

► SQL Server Installations: Press Next.

How to Do:

Ignore the Database Folder screen.

1.9 Select "**Install Zavanta Author**" option, then press Next.

Result:

You will see a confirmation screen and then a progress screen. When the process is completed, all the features for Zavanta are installed. The features for the modules ordered will be activated once you exit and enter Zavanta again.

1.10 Press Finish.

1.11 Reboot the PC if prompted.

2

(SQL Installations only) Connect the Author's PC to the Zavanta database. (Connection Wizard)

2.1 Run the Zavanta Connection Wizard.

How to Do:

Go to **START=>Programs=>Zavanta=>Connection Wizard**.

2.2 Enter the name of the server where the database was created.

2.3 Select the Authentication that you want SQL Server to use.

How to Do:

The Windows option is recommended.

2.4 Select the database from the drop-down list.

How to Do:

This is the database your SQL Administrator previously created.

Result:

After you select the database and press Next you will see the message "Database Connection Successful"

If an Error Occurs:

Contact the SQL Server administrator to ensure you have

- the correct servername
- the correct database name
- been set up as an authorized SQL user with the proper SQL rights

Then run the Connection Wizard again.

2.5 Press the Finish button.

3 Launch Zavanta to make sure everything installed properly. (DO NOT SKIP).

How to Do:

Start Zavanta by selecting "Zavanta" from **Start=>Programs=>Zavanta** or by clicking on the Zavanta icon on your desktop. Log in by entering the username and password assigned to you by the Zavanta Administrator

If an Error Occurs:

If the program does not launch, or if you experience any unusual or unexpected results on launch, check the Troubleshooting section of these instructions.

4 Notify your Zavanta System Administrator that you have installed the author workstation.

How to Do:

Your Zavanta System Administrator must create a user login for you so that you can launch Zavanta. If this has not already been done, contact your Administrator and have a login created for your workstation. SQL users must also have proper rights to the SQL database.

Troubleshooting

- Common Problems:**
- If the installation has been performed using a different logon than the user's logon, make sure the actual user can launch Zavanta and has full rights. To test, have the user log in to their PC using their own profile and launch Zavanta. If they get an error, this typically means that they either don't have the proper permissions or a control that Zavanta needs did not get registered properly.
 - If you get the message "**Database not found**" make sure you entered the correct server name.
 - If you get any type of **ODBC error message**, you may need to update your drivers. The suggested MDAC refresh for your Windows environment can be downloaded from Microsoft's website
 - If you get the message: "**Registry: Access denied**" check that you have full rights to the key: **HKEY_LOCAL_MACHINE\software\Comprose** in the registry.

How to get help: Contact your Zavanta System Administrator

Note at what step in the instructions you go the error. Also note any error messages.

FAQs are available at our Customer Support website: <http://www.comprose.com>. Click on the Customer Login link. Log on to the support site using your Zavanta serial number.

You can contact COMPROSE Technical Support.

- Email: support@comprose.com
- Phone: 1-800-719-8964

Zavanta Storage and Sizing Benchmarks

Customer Support Instructions

Doc Number: TechSup-2020

Document Owner: Technical Support

Author: Technical Support

Rev #: v1.2

Last Updated: 02/12/2014

Status: Approved and Released

General Description

Description: This document provides details about potential growth and additional storage requirements over time as the Zavanta implementation matures.

Purpose: It is helpful to understand storage and sizing benchmarks for future planning and to make sure you have adequate hardware.

Detailed Steps

► Storage requirements - Database

How to Do:

20MB - 30MB to start. Projected growth is dependent on several variables:

- Number of Documents,
- Amount of text in each document (or size);
- Number and size of pictures/objects stored in database. (Typical Zavanta users do not store the actual pictures. They normally just store the links.)

Examples of database sizes (based on actual customer data):

# of Documents:	Average Doc Size:	Stored pictures:	Databse size:
3,500	moderate	many	7.5 GB
3,500	moderate	none	4.0 GB
1,000	large	some	3.0 GB
500	moderate	none	0.5 GB

Note: moderate amount of text = 5 "pages" or less per doc when printed.

► Storage Requirements - Network file server

How to Do:

10MB - 30MB to start.

Some storage space is normally needed on a shared network folder to hold source files that will be used as attachments in Zavanta documents (pictures, pdfs, flow charts, etc.).

The amount required can vary a great deal. Some Zavanta users have very few attachments.

Others may average 5-20 screenshots per document.

► **Storage Requirements - Zavanta-generated Website**

How to Do:

10MB - 30MB to start.

Actual requirements depend on on several variables:

- Number of Docs exported as html outfiles
- Amount of text in each doc
- Number and size of picture/object files attached (All picture and object files used as attachments get copied to the "website" and do impact the storage requirement on the web server.)

Examples: (based on actual user websites)

# of Documents:	Total storage:
2,100	17 MB
900	28 MB
160	9 MB

Zavanta's Active Directory Integration

Customer Support Instructions

Doc Number: TechSup0071

Document Owner: Technical Support

Author: Technical Support

Rev #: v1.1

Last Updated: 06/20/2014

Status: Approved and Released

General Description

Description: In order to activate this feature you must have the Gold Edition.

Zavanta's Active Directory integration enables organizations to bypass Zavanta's standard login (username and password) and use Microsoft's Active Directory (AD) for user login to Zavanta. The benefit is that you don't need to create and manage separate Zavanta usernames and passwords. Instead, users can login with the same credentials that they use for other applications.

Keep in mind this is for Authors / Reviewers / Approvers only, not for the Viewers or employees accessing the website portal generated by Zavanta.

To set up AD integration, you'll need to have groups in Zavanta with corresponding groups in AD. Your users will need to be added to the appropriate groups in AD. When added to AD, the user will automatically get added into Zavanta's User Manager.

Examples:

Group Name in Zavanta	Group Name in Active Directory
Administrators	Zavanta-Administrators
Everyone	Zavanta-Everyone
Owners-Managers	Zavanta-Owners-Managers
Reviewers-Approvers	Zavanta-Reviewers-Approvers
Subject-Experts	Zavanta-Subject-Experts

Active Directory® is a registered trademark of the Microsoft Corporation.

Who Performs: Network Administrator (AD Administrator)
Zavanta Administrator

Requirements

Pre-Knowledge: Before performing this task you must know ...
How to access and use Zavanta's User Manager
How to set up User Groups in Zavanta
How to set up and add users to Active Directory

Specific Knowledge:
Before you start, you'll need to do a little planning. Decide what user groups you will need in Zavanta. You'll also need to define these corresponding groups in Active Directory.

For more information on how Zavanta's security and user groups/permission features work, please refer to the PDF "**Understanding and Using Zavanta Gold Security**".

Materials: List of user groups
List of Zavanta users - Authors, Admins, Reviewers

Warnings and Precautions

Precautions: To avoid errors do the following before performing this task:
Make a backup of your database
Make sure all users are logged out of Zavanta

Detailed Steps

1 Make desired changes to user groups and permissions within Zavanta.

1.1 Log in to Zavanta using the local Administrator account.

1.2 Access the User Manager from within Zavanta

1.3 Make any desired changes to the security rights for existing security groups within Zavanta

How to Do:

Be sure not to use any special characters in the name of the security group that are prohibited by Microsoft Active Directory for security group names.

- New customers: There will already be default groups created in Zavanta.
- Existing customers: If you are upgrading from version 6.x or earlier, you will need to rename any groups you have to make them conform to AD standards. Change slash marks to dashes. For example change Reviewers/Approvers to Reviewers-Approvers.

1.4 Create any additional security groups and assign the appropriate security rights.

How to Do:

Depending on how you want to manage and control users you may want to create your own groups in addition to the Zavanta defaults.

Special Warnings:

Be sure not to use any special characters in the name of the security group that are prohibited by Microsoft Active Directory for security group names, i.e. / (slash marks)

2 Select the authentication preference.

2.1 Open Zavanta General Preferences and select click the Authentication tab.

How to Do:

Optional: For added security, we've added an option for password protecting this screen, so that unauthorized users cannot change the authentication method. Enter a password.

Document your password. Make sure you keep it in a safe place.

2.2 Select the authentication method you want.

How to Do:

Most of the time you'll want to have all users log in the same way. However, it is possible to still have some users log into Zavanta using Zavanta's standard login and some users login with AD.

Select either the "Allow only Active Directory / Windows Authentication" or "Allow both Zavanta and Active Directory / Authentication" option.

2.3 Save your changes and exit Zavanta

Result:

The Zavanta setup is complete.

3 Create matching user groups in Active Directory.

3.1 Open the Microsoft Active Directory Users and Computers tool on any network domain controller.

3.2 Add the AD user account the Zavanta-Everyone Active Directory group for any users to which you would like to give Zavanta access.

How to Do:

All AD accounts needing access to Zavanta must have membership in at least the **Zavanta-Everyone** group.

3.3 Create any additional user groups to match the groups in Zavanta.

How to Do:

Be sure to preface the security group name with "Zavanta-". For example, if you created a Zavanta security group named "Marketing" in Zavanta, the corresponding Active Directory security group name would be "Zavanta-Marketing".

Result:

All the setup in Zavanta and Active Directory is completed.

4 Add users to the Zavanta Active Directory groups.

Result:

Users in these groups will now be added to Zavanta's User Manager and into the appropriate user group in Zavanta. They will be able to log into Zavanta using Active Directory.

Troubleshooting

How to get help: If you have questions or need help, please email support@comprose.com or call 1-800-719-8964.