

Hosted Encore 5 Desktop Installation Guide

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WARNING: This Guide is for quickly configuring desktops to communicate with Cluen's hosted Encore solution. If you are installing Encore within your own data center, request the "Encore 5 Installation Guide".

The Cluen Corporation
7 West 22nd Street, 5th Floor
New York, NY 10010
www.cluen.com
(212) 255-6659 • support@cluen.com

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Background

Encore 5 can be deployed internally within your environment or hosted from our CluenCloud facility using an identical product. Your firm has chosen to have Cluen host your data file and, optionally, your documents.

This guide is designed to quickly walk you through configuring your desktop to access Encore. If your technical person requires detailed information about Encore, you can request a copy of the "Encore 5 Installation Guide", or contact our support team.

Requirements

The Encore desktop client requires Microsoft.NET Framework 3.5 SP1 (or 3.5.1) in order to run under 32/64-bit Windows XP/Vista/7/8.x/10 (with display settings at normal dpi). This should have been automatically installed by Windows Update Server; if not, the Encore installer will launch a browser for you to download directly from Microsoft's MSDN library (some operating systems use 3.5.1 which is located under "Turn Windows features on or off" within the Control Panel).

The minimum memory requirement for 32-bit operating systems is 2GB RAM (3.5GB RAM recommended); Encore will run under 512MB RAM (on 32-bits only), but you may want to limit other applications (for example, Office alone requires a minimum of 1GB RAM to enable all features). The client uses less than 75MB of disk space (not including the .NET Framework).

Keep in mind that 64-bit operating systems generally prefer double the RAM to 32-bit operating systems. Cluen recommends 8GB RAM with a minimum of 4GB RAM for 64-bit operating systems. An 8GB 64-bit Terminal Services is roughly equivalent to a 4GB 32-bit Terminal Services.

You may also want to disable power management of the hard drive and network adapter, since Encore checks for reminders in the background (and those two devices do not generally power up in time).

NOTE: You will receive the "Encore 5 Client Configuration Settings" document containing your specific configuration settings.

Troubleshooting

If you have an installation issue, contact Cluen via support@cluen.com or call us at (212) 255-6659 and press 3 for Support Team. Sending an email with a quick description of the issue and a call back number generally results in the fastest response because we can determine which expert to assign to your case.

Client

Installation

1. Use a web browser to go to <http://nimbus.cluen.com/>.
2. Click the link labeled "Client Installer".
3. Depending on your browser, you will have two choices Run/Open or Save; pick Run/Open which will start downloading and then start the installation.
NOTE: While the installer is only 25MB, if you are installing on multiple computers and have a slow connection, you can save the file on your network and run from that location.
4. If you get a security prompt confirming that you want to run the installer, select Run.
5. Confirm that this is the Encore 5 Setup program by reading the top line. If correct, press Next.
6. In the Select Installation Folder window, choose the folder where Encore 5 will be installed. The default folder is C:\Program Files\Cluen\Encore 5. This can be modified by pressing the Browse... button and choosing the intended installation folder. After verifying the installation folder location, press Next.
7. In the Ready to Install window, press Install to begin the installation process. In order to review or change the installation settings, press Back.
8. In the Completing the Encore 5 Setup Wizard window, press Finish.
9. Start Encore by picking the icon on the desktop or from the start menu (unless you chose to launch after the installation).

NOTE: You will receive the following message: **Encore is having trouble with your database settings. Please review your connection information.**

Configuring

1. Confirm that the Connection Settings dialog is displayed (once Encore has started).
2. Move radio-selector to "Server" (if set to "Stand-Alone").
3. In the box under "Server", type "nimbus.cluen.com" (without quotes).
4. The "Port" will fill with "443".
5. Set your database login option to "The user should only login to this database".
6. Fill in the name of the database supplied by Cluen to you; this will be listed as DATABASE on your "Encore 5 Configuration Settings" document.
7. Close Connection Settings by clicking the X in the upper-right corner.
8. Answer Yes to: "Some settings have changed. Would you like to make them the defaults for the machine."
9. If you are not using our file storage, click the Encore icon to get started (or continue with the next page to install the optional File Storage).
10. **NOTE:** If you have trouble connecting and are in a corporate firewalled environment, see "Appendix C: Using Client Through a Proxy" on page 11.

Slingshot (optional)

Description

If your firm has chosen Cluen's optional Slingshot web application, you will have light functionality from mobile devices. While we are attempting to support as many mobile browsers as possible, the

minimum requirement is (generally) a mobile browser that supports Asynchronous JavaScript and XML (AJAX) and based on the WebKit layout engine. This includes Apple iPhones, Apple iPads, Google Android devices and Blackberries (running O/S 6.0 or greater). In addition, Slingshot will allow access from desktop browsers meeting these requirements.

Wireless Access

In order to access this feature located on the CluenCloud, you must activate each user (under Tools and Slingshot permission in the security details) you want to grant access and then go to <http://nimbus.cluen.com/slingshot> on the device to login. You will need to enter your assigned database name (similar to the way the desktop client was configured).

File Storage (optional)

Description

Cluen's file storage option adds a drive letter to your desktop, so that you can save files in a location that can be shared with your entire team. It is important that you backup these files in case of a virus or accidental deletion (see "Backup" below).

Cluen offers managed file storage from two different vendors:

DriveHQ (see "Appendix A: Installation of DriveHQ" on page 7)

or

Jungle Disk (see "Appendix B: Installation of Jungle Disk" on page 8).

You should only install one of these two products, if you signed up for the optional file storage.

NOTE: If you signed up for this option, your "Encore 5 Configuration" document will contain product, location, user names and passwords. You will most likely need to reboot your desktop during this installation.

Backup

While cloud document storage is designed for maximum reliability (files are spread over multiple servers to protect against failure), you will want to backup your documents (to ensure safety).

In order to backup your cloud document storage, you can use (a) the free built-in Windows Backup, (b) an online backup program of your choosing (that support backing up of a network storage device), or (c) Cluen can help you configure (with our recommended settings) an inexpensive product such as IDrive which runs automatically and should retain the last 30 file versions offsite.

Remember, you can include the cloud document storage in your normal backup of critical files that are not stored on the cloud (e.g., your accounting data file); you can also include your accounting data file within the IDrive backup.

Notes

The cloud storage drive is designed for résumé files and other small documents. When Encore copies or you drag a file to the storage cloud, it needs to be uploaded from your desktop. When this happens, the file will appear to be in your folder (because it is cached), but may take a few minutes before other users see the file. The cache will cause copies of some documents to be stored on the local computer; you will need to empty the document cache during computer decommissioning.

The storage cloud does not support file/record locking; you cannot use an application such as Microsoft Access or QuickBooks to manage a file stored on the cloud. Since it is just a storage device, it will not give a warning if two users attempt to work on a file at the same time or work with Office shared documents. But, it will keep file backups in a ~VersionArchive folder for a few days (in case something gets overwritten by accident).

Appendix A: Installation of DriveHQ

1. Use a browser to go to <http://nimbus.cluen.com>.
2. Click the link labeled "WebDAV Drive Mapping Tool" under "DriveHQ Remote Drive (optional)".
3. Depending on your browser, you will have two choices Run/Open or Save; pick Run/Open which will start downloading and then start the installation.
4. Confirm that this is the WebDav Drive Setup Wizard program by reading the top line. If correct, press Next.
5. In the Destination Folder window, choose the folder where you want the program to be installed. The default folder is C:\Program Files (x86)\DriveHQ\WebDAV Drive Mapping\. This can be modified by pressing the Change... button and choosing the intended installation folder.
6. Confirm that the installation will be set to Everyone that uses the computer. Press Next.
7. On the Confirm Installation page, press Next.
8. When you get the Installation Complete page, press Close.
9. Run the "WebDAV Drive Mapping" from the Start Menu (it may be located under a DriveHQ folder).
10. If you get the Windows' Firewall warning, choose Allow Access.
Each user is assigned a different username and password.
11. In the box next to "Username/Email", enter the name supplied on your "Encore 5 Configuration Settings" document for that user.
12. In the box next to "Password", enter the password supplied on your "Encore 5 Configuration Settings" document for that user.
13. Confirm that both "Remember Login Info" and "Logon Automatically" have checkmarks.
14. Press Log On button.
15. In the box next to "Path to Map", enter the following "\\DriveHQShare\Cluen\XXXXX" where XXXXX is your Encore "Database" without the numbers from the top of "Encore 5 Configuration Settings". For example, if the database is "World14532", you would enter "\\DriveHQShare\Cluen\World".
16. In the box next to "Drive Letter", use the dropdown to pick "R:".
17. In the box next to "Drive Name", type in "EncoreDocs".
18. Press "Map Drive" and an Explorer window will open showing the documents (you can close this).
19. Press the X in the upper-right corner to close the WebDAV Drive Mapping program (and answer Yes to close the program. Do NOT press "Log Off").

If you are still having trouble, we recommend that you completely remove the drive and reinstall by following the instructions below:

Uninstall DriveHQ

1. In Control Panel go to Add/Remove Programs (under XP) or Programs (under Vista or Windows 7/8.x/10).
2. Uninstall WebDAV Drive Mapping (by DriveHQ).
3. Reboot computer.

Appendix B: Installation of Jungle Disk

1. Use a browser to go to <http://nimbus.cluen.com>.
2. Click the link labeled "Cloud Storage 32" or "Cloud Storage 64" (depending on your version of Windows) under "Jungle Disk Remote Drive (optional)". **NOTE:** Vista, Windows 7/8/10 users can check the bit level by clicking Start, right-click "Computer" and select Properties; under System, it will display 32-bit or 64-bit. Windows XP users should download the 32-bit version.
3. Depending on your browser, you will have two choices Run/Open or Save; pick Run/Open which will start downloading and then start the installation.
4. Confirm that this is the My Secure Backup Setup program by reading the top line. If correct, press Next.
5. In the End-User License Agreement window, read the License Agreement and if you accept it, check "I accept the terms in the License Agreement" and press Next.
6. In the Destination Folder window, choose the folder where you want the program to be installed. The default folder is C:\Program Files\My Secure Backup. This can be modified by pressing the Change... button and choosing the intended installation folder. After verifying the installation folder location, press Next.
7. In the Ready to Install My Secure Backup window, Press Install.
8. Reboot computer, when prompted; setup will continue, once Windows starts up.
9. Confirm that this is the program by reading "My Secure Backup First Time Setup" from the top line. If correct, press Next.
10. In the box next to "Domain", enter "cluen"
Each user is assigned a different username and password.
11. In the box next to "Username", enter the name supplied on your "Encore 5 Configuration Settings" document for that user.
12. In the box next to "Password", enter the password supplied on your "Encore 5 Configuration Settings" document for that user.
13. Press Next to save and verify account.
14. On the "Network Drive" window, drop down the selector and choose R (for résumés).
NOTE: It is important that every user has the same drive letter so that everyone can link files (if R is used by another device, pick a different drive letter, making sure every installation has the same letter).
15. Confirm Maximum Cache size is 5GB.
16. Press Next
17. In the Initial Setup Complete Window press Finish to end the installation.
18. You may see a My Secure Backup Activity Monitor that you should close by hitting X in the upper-right corner.
19. Confirm that your drive is working by right-clicking the Start/Windows Orb (or Start button in XP) and choosing Computer (or My Computer in XP). You should be able to see the R drive.

Antivirus Recommendations

Since Jungle Disk is a network-based file management system and antivirus is primarily designed to monitor files that come into or leave out of your computer via a network, there's a potential for

antivirus to interfere with our connection. We recommend safe-listing the following in your antivirus program:

1. The File Storage Program
 - a. Windows 7/8.x/10 default install location: C:\Program Files\My Secure Backup
2. The File Storage Cache Directory (default locations for this directory are listed below)
 - a. Windows Vista/7/8.x/10: C:\ProgramData\MySecureBackup
 - b. Windows XP: C:\Documents and Settings\All Users\Application Data\My Secure Backup
3. The File Storage Settings File
 - a. Windows Vista, 7, and 8.x, 10, Server 2008, 2012: C:\ProgramData\MySecureBackup\
 - b. Windows XP, Server 2003: C:\Documents and Settings\All Users\Application Data\My Secure Backup\
4. The driver located at C:\Windows\System32\drivers\cbfs3.sys.
5. Drive Letter that maps to an online disk.

NOTE: If you have MalwareBytes installed, the above suggestions might not be enough since this suite is known to cause complicated issues with the redirection service.

Troubleshooting Jungle Disk

If you cannot see the R drive, make sure that the MySecureBackup service is running (if not, start the service) and that the start up options are set to Automatic; this is controlled under the Services Management Console in the Control Panel under Administrative Tools).

Service Recovery Recommendation

The MySecureBackup service in some cases will stop unexpectedly causing the R drive to disappear. A workaround to this issue is to set the service to recover if the system detects the service is stopped.

1. In Control panel go to Administrative Tools and choose Services.
2. Open "MySecureBackup" and click on the "Recovery" tab.
3. Set the First, Second and Subsequent failures to "Restart the Service".
4. Click OK.

If you are still having trouble, we recommend that you completely remove the drive and reinstall by following the instructions below:

Uninstall My Secure Backup

4. In Control Panel go to Add/Remove Programs (under XP) or Programs (under Vista or Windows 7/8.x/10).
5. Uninstall My Secure Backup.
6. Reboot computer.

Clean Configuration and Cache Files

XP Users

1. Navigate to "C:\Program Files" delete "My Secure Backup" folder.

2. Navigate to "C:\Documents and Settings\All Users\Application Data" and delete "MySecureBackup" folder.
3. Navigate to "C:\Documents and Settings\[USERNAME]\Application Data" and delete "MySecureBackup" folder where [USERNAME] is the local user.

Vista and Windows 7 users

1. Navigate to "C:\Program Files" delete "My Secure Backup" folder.
2. Navigate to "C:\Programdata" and delete "MySecureBackup" folder.
3. Navigate to "C:\Users\[USERNAME]\AppData\Roaming" and delete "MySecureBackup" folder where [USERNAME] is the local user.

Reinstall the File Storage by following the instructions under "File Storage (optional)" on page 6.

Appendix C: Using Client Through a Proxy

The Encore client is designed to achieve maximum performance using TCP binding by sending binary data across port 443 to nimbus.cluen.com.

If your firewall cannot be configured for the best user experience, the Encore client can be set to use HTTP (using SOAP over port 80) to communicate; your data is still AES encrypted. In addition, HTTP is proxy aware and can support the sending of user credentials.

Configuration Substitutions

1. In the box under "Server", type "proxy.nimbus.cluen.com" (without quotes).
2. The "Port" will fill with "80".
New options will appear for (optional) proxy awareness.
3. In the box under "Proxy Server", type the address of your proxy server (if using proxy).
4. In the box under "Proxy Port", type the port you use to communicate with your proxy server (if using proxy).

If a Proxy Server is filled in, the user will be prompted for their credentials to be passed Encore's HTTP request.