



Our Automation. Your Liberation.™

Kaseya 2

Kaseya Server Installation and Update

User Guide

Version 6.1

March 14, 2011

About Kaseya

Kaseya is a global provider of IT automation software for IT Solution Providers and Public and Private Sector IT organizations. Kaseya's IT Automation Framework allows IT Professionals to proactively monitor, manage and maintain distributed IT infrastructure remotely, easily and efficiently with one integrated Web based platform. Kaseya's technology is licensed on over three million machines worldwide.

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Introduction

The following instructions describe how to:

- Install a new Kaseya 2 (K2) Server, or
- Upgrade to K2 from an existing Kaseya Server running Kaseya v4.x or later.

About Kaseya

The Kaseya Server allows administrators to manage their entire computing infrastructure with one integrated web-based information technology application. The Kaseya Server is the central component of the Kaseya IT Framework, issuing schedule-based instructions to Kaseya agents. All communication to the Kaseya Server is initiated from a Kaseya agent, making it virtually impossible for a third-party application to attack the agent from the network.

Administrators access the Virtual System Administrator™ (VSA) console through a web interface, allowing them to perform and schedule system management activities to remote systems.

Pre-Installation

Pre-Install Checklist

Before installing the Kaseya Server software, use the checklist below to verify that all the necessary prerequisites have been met.

Note: Installing Kaseya on a domain controller is NOT supported.

Note: Installing Kaseya on a server running Microsoft Exchange is NOT supported.

Note: Installing Kaseya on a server running MS Small Business Server is NOT supported.

Note: Installing Kaseya on a server running other server products other than SQL Server is NOT supported.

<input type="checkbox"/>	If you are running a 3rd party product that integrates with Kaseya—for example, Autotask, ConnectWise, or Tigerpaw—check with the 3rd party vendor to ensure their integration is compatible with the version of Kaseya you are upgrading to.
<input type="checkbox"/>	Verify the system requirements (http://help.kaseya.com/WebHelp/EN/VSA/6010000/InstallationPrerequisites.asp) for the number of agents that you plan to support. <ul style="list-style-type: none"> • Hardware - See <i>Unsupported Kaseya Server Platforms (page 5)</i>. Verify disk sizing requirements (page 5). A minimum of 500 megabytes is required. Verify memory requirements (page 6). • Windows version and service pack level • SQL Server version and service pack level. See <i>Using Microsoft SQL 2005 64 Bit (page 5)</i>.
<input type="checkbox"/>	Install Microsoft .NET Framework 2.0 (page 6).
<input type="checkbox"/>	Install Microsoft .NET Framework 3.5 (page 6).
<input type="checkbox"/>	Install Microsoft Internet Information Services (IIS) (page 6).
<input type="checkbox"/>	Install Microsoft ASP.NET State Service (page 8).
<input type="checkbox"/>	Install Microsoft Message Queue (MSMQ) (page 9).
<input type="checkbox"/>	Install SQL Server (page 11), including Reporting Services. <i>Make a note of the SQL Server system administrator (sa) password for future reference.</i>
<input type="checkbox"/>	Configure SQL Server Reporting Services (page 14).
<input type="checkbox"/>	Apply the latest patches (page 9) for the operating system.
<input type="checkbox"/>	Ensure any proxy servers are bypassed (page 10).
<input type="checkbox"/>	Determine the Kaseya domain name or IP address (page 10) the Kaseya Server will use.
<input type="checkbox"/>	Open the appropriate ports in the <i>internet firewall</i> . See Port Configuration (page 11).
<input type="checkbox"/>	Open the appropriate ports in the <i>Windows firewall on the server hosting the KServer</i> . See Port Configuration (page 11).
<input type="checkbox"/>	Disable real-time anti-virus security protection (page 14) just before beginning the install.

System Requirements

Kaseya recommended [system requirements](http://help.kaseya.com/WebHelp/EN/VSA/6010000/InstallationPrerequisites.asp) (<http://help.kaseya.com/WebHelp/EN/VSA/6010000/InstallationPrerequisites.asp>) are a guide to help the user plan for a Kaseya implementation, based on the number of agents to be deployed.

Important: The Kaseya Service software must be installed on a server dedicated to the Kaseya application to qualify for server-related support.

Unsupported Kaseya Server Platforms

SQL 2000 is not supported with the current release of the Kaseya Server.

Note: Installing Kaseya on a domain controller is NOT supported.

Note: Installing Kaseya on a server running Microsoft Exchange is NOT supported.

Note: Installing Kaseya on a server running MS Small Business Server is NOT supported.

Note: Installing Kaseya on a server running other server products other than SQL Server is NOT supported.

Using Microsoft SQL 2005 64 Bit

As documented in the System Requirements, you can install the Kaseya Server on various 64 Bit versions of Windows and SQL. Running MS Windows 64-bit (XP, Vista, 7, Server), SQL Server 2005 64-bit (and the Kaseya Server) all on a single Windows machine is not recommend due to a Microsoft issue related to MS Reporting Services. The issue is described in the Microsoft article [How to: Install 32-bit Reporting Services on a 64-bit Computer](http://msdn.microsoft.com/en-us/library/ms143293(SQL.90).aspx) ([http://msdn.microsoft.com/en-us/library/ms143293\(SQL.90\).aspx](http://msdn.microsoft.com/en-us/library/ms143293(SQL.90).aspx)).

There is no issue if you are running SQL Server 2005 64-bit on a separate machine from the Kaseya Server.

Disk Sizing Requirements

It is important to ensure sufficient disk space exists on the drive selected for your Kaseya Server application and database environments. Kaseya recommends a minimum of 5 megabytes (MBs) of the disk space for each machine that will be managed by the Kaseya Server. *A minimum of 500 megabytes is required.*

For example, when managing 150 machines, a minimum of 750 MBs of available disk space is required for the SQL Server 2005 Express database, on the drive where the Kaseya Server application has been installed.

See the current [minimum system requirements](http://help.kaseya.com/WebHelp/EN/VSA/6010000/InstallationPrerequisites.asp) (<http://help.kaseya.com/WebHelp/EN/VSA/6010000/InstallationPrerequisites.asp>).

Memory (RAM) Requirements

An adequate amount of properly configured RAM is essential for good system performance. To ensure enough memory resources are available, you must not include the /3GB switch in your boot.ini; otherwise excessive paging can result, impacting performance. To allow SQL Server to take advantage of memory above 4Gig, the /PAE switch is highly recommended along with the AWE feature enabled in SQL Server. When SQL Server is running on the same machine as the Kaseya Server, Min and Max Memory settings must be configured to allow at least 2 Gigabytes of free RAM to the OS and Kaseya processes.

Prerequisite Installs

The following prerequisites apply to both new K2 installs of Kaseya and updates to K2 from previous versions of Kaseya.

- IIS for your operating system
- Microsoft NET Framework 3.5 Service Pack 1 or later
- Message Queuing Service (MSMQ)
- SQL Server
- SQL Server Reporting Services

Installing Microsoft NET Framework

The Kaseya Server requires:

- Microsoft .Net Framework 2.0 Service Pack 2 or later
- Microsoft .Net Framework 3.5 Service Pack 1 or later

You will find these updates at <http://update.microsoft.com>.

Verify that the .NET Frameworks are installed via the Add/Remove Programs console on your server.

Note: The ASP.net State Service that is installed with ASP.net must be manually started.

Installing Internet Information Service (IIS)

Windows XP Pro

- Open the Control Panel
- Select Add/Remove Windows Components
- Check the box to select Internet Information Services (IIS)
- Click the Next button.

Windows 2003 and 2003 R2

- Open the Control Panel
- Select Add/Remove Windows Components
- Select Application Server and click Details
- Check the box to select Internet Information Services (IIS)
- Click the OK button.

Vista Pro

- Open the Control Panel and select Programs
- Select Programs and Features
- Select Turn Windows Features On or Off
- Check the box to select Internet Information Services
- Expand World Wide Web Services
- Expand Common HTTP Features and check all boxes to select all features
- Expand Application Development Features and check all boxes to select all features
- Click the OK button.

Windows 7 Pro

- Open the Control Panel and select Programs
- Select Programs and Features
- Select Turn Windows Features On or Off
- Check the box to select Internet Information Services
- Expand World Wide Web Services
- Expand Common HTTP Features and check all boxes to select all features
- Expand Application Development Features and check all boxes to select all features
- Expand Security and click authentication Methods Basic, Digest, and Windows
- Click the OK button.

Windows 2008 and 2008 R2

- Open the Server Manager from Administrative Tools
- Click on Roles
- Click the Add Roles link
- Check the box to select Web Server (IIS)
- Click the Next and Install buttons
- Scroll to the Web Server (IIS) section
- Scroll to the Role Services section
- Click the Add Role Services link
- Expand Web Server
- Expand Common HTTP Features and check all boxes to select all feature
- Expand Application Development and check all boxes to select all feature
- Click the Next and Install buttons

Prerequisite Installs

Verify IIS For All Versions

Verify that IIS is running by browsing to <http://localhost>. You should get a page labeled Under Construction, or a similar page depending on your version of Windows.

If Page cannot be displayed or Can not find server message(s) display in the web browser, IIS has not been configured correctly. Do not proceed with the Kaseya Server installation. The installation will fail if IIS is not installed and configured properly.

While the web browser is open, ensure that the server is NOT configured to access the internet via a proxy server. Follow the steps below.

- Select Tools on the browser's menu bar.
- Select Internet Options. In the Connections tab, select the LAN Settings button and verify that the Proxy Server Option is NOT checked.

Installing ASP.NET State Service

Windows XP Pro

- The ASP.NET State Service is installed when Microsoft NET Framework 3.5 is installed.

Windows 2003 and 2003 R2

- Open the Control Panel
- Select Add/Remove Windows Components
- Select Application Server and click Details
- Check the box to select ASP.NET
- Click the OK button.

Windows 7 Pro and Vista Pro

- Open the Control Panel and select Programs
- Select Programs and Features
- Select Turn Windows Features On or Off
- Expand Internet Information Services
- Expand World Wide Web Services
- Expand Application Development Features
- Check the box to select ASP.NET
- Click the OK button.

Windows 2008 and 2008 R2

- Open the Server Manager from Administrative Tools
- Click on Roles
- Click the Add Roles link
- Check the box to select Web Server (IIS)
- Click the Next and Install buttons
- Scroll to the Web Server (IIS) section
- Scroll to the Role Services section
- Click the Add Role Services link
- Expand Web Server
- Expand Common HTTP Features and check all boxes to select all feature
- Expand Application Development and check all boxes to select all feature
- Click the Next and Install buttons

Installing Message Queuing Service (MSMQ)

Add the Message Queuing Service (MSMQ).

Note: When you enable MSMQ, do not include MSMQ's Active Directory sub-component. This will greatly improve the performance of the Kaseya Server.

Windows XP Pro

- Open Add/Remove Programs in control panel.
- Click Add/Remove Windows Components.
- If checked, uncheck Message Queuing.
- Click Next to remove Queuing completely.
- Return to Add/Remove Windows Components.
- Check Message Queuing and then click Details.
- Uncheck Active Directory Integration.

Windows 2003 and 2003 R2

- Open Add/Remove Programs in control panel.
- Click Add/Remove Windows Components.
- Select Application Server and click Details.
- Select Message Queuing and click Details.
- UNCHECK everything EXCEPT Common.

Windows Vista Pro and Windows 7 Pro

- Open the Control Panel and select Programs.
- Select Programs and Features.
- Select Turn Windows Features On or Off.
- Expand Microsoft Message Queuing (MSMQ) Server.
- Expand Microsoft Message Queuing (MSMQ) Server Core.
- CHECK Microsoft Message Queuing (MSMQ) Server.
- Ensure everything BELOW Microsoft Message Queuing (MSMQ) Server Core is unchecked.

Windows 2008 and 2008 R2

- Open the Server Manager from Administrative Tools.
- Select Features under the Server Manager.
- Click Add Features.
- Expand Message Queuing.
- Expand Message Queuing Services.
- CHECK Microsoft Message Queuing (MSMQ) Server.
- UNCHECK everything EXCEPT Message Queuing Server.

Apply Latest OS Patches

Ensure that the intended Kaseya Server has all of the current patches, including the latest MS IIS patches. If installing any of these patches now, ensure that the intended Kaseya Server has been rebooted prior to beginning the server installation.

Bypass Proxy Server

Kserver

Ensure that the Kaseya Server is not configured to access the internet via a proxy server.

Agents

Kaseya agents may be configured to connect to the Kaseya Server through a proxy server. See the following KB articles.

- [WinHTTPProxy](http://help.kaseya.com/WebHelp/KB-Article.asp?274832) - A Windows feature that allows Windows services to use a proxy server. This is required for patch management to work on agents that are behind a proxy. See Kaseya KB article 274832 (<http://help.kaseya.com/WebHelp/KB-Article.asp?274832>).
- [cURL](http://help.kaseya.com/WebHelp/KB-Article.asp?280006) - Kaseya uses a small program on both the agent and Kserver to fetch URLs. By default cURL does not use a proxy server. A page within the Kaseya interface allows you to specify proxy details for cURL. From that point onwards, any requests cURL makes to the internet will go through the proxy. See Kaseya KB article 280006 (<http://help.kaseya.com/WebHelp/KB-Article.asp?280006>).
- [Kaseya proprietary protocol](http://help.kaseya.com/WebHelp/KB-Article.asp?291728) - The protocol the agent uses to speak to the Kserver. This is a proprietary, encrypted protocol that does not support the use of proxy servers. It requires the agent connect directly to the Kserver. See Kaseya KB article 291728 (<http://help.kaseya.com/WebHelp/KB-Article.asp?291728>).



Kaseya Server Domain Name or IP Address

Kaseya agents initiate all communication with the Kaseya Server, it is for this reason the agents must always be able to reach the domain name or IP (Internet Protocol) address assigned to the Kaseya Server. Choose an IP address or domain name which can be resolved from all desired network(s), both on the local LAN and across the internet.

Note: Although a public IP address may be used, Kaseya recommends using a Domain Name Server (DNS) name for the Kaseya Server. This practice is recommended as a precaution should the IP address need to change. It is easier to modify the DNS entry than redirecting orphaned agents.

Port Configuration

The following ports need to be open on two separate firewalls:

- Internet Firewall
- Windows Firewall on the Server Hosting the KServer and/or Database Server

Ensure other systems or services are not using these ports.

Internet Firewall

- [TCP and UDP 5721](#) - inbound and outbound - A single port number specification—5721 by default—sets the ports used for the following:
 - Kaseya agents use inbound TCP port 5721 to communicate with the Kaseya Server.
 - The Kaseya Server uses outbound TCP port 5721 to communicate with Kaseya's Corporate Headquarters.
 - UDP 5721 - inbound and outbound - required to use Live Connect.

The default 5721 port number may be changed to any other free and available port during or after Kaseya Server installation.

- [TCP 25](#) - Used to send email alert notifications.
- [TCP 80 \(HTTP\) or TCP 443 \(HTTPS\)](#) - Enables system administrators to connect to Kaseya web pages for remote management.

[Changing the Port Used by the VSA from Port 80 - Consult the KB article HOWTO: Change the port that the Kaseya VSA web console runs on from port 80 \(http://help.kaseya.com/WebHelp/KB-Article.asp?286163\)](#).

Windows Firewall on the Server Hosting the KServer and Database Server

- [TCP and UDP 5721](#) - inbound and outbound - A single port number specification—5721 by default—sets the ports used for the following:
 - Kaseya agents use inbound TCP port 5721 to communicate with the Kaseya Server.
 - The Kaseya Server uses outbound TCP port 5721 to communicate with Kaseya's Corporate Headquarters.
 - UDP 5721 - inbound and outbound - required to use Live Connect.

The default 5721 port number may be changed to any other free and available port during or after Kaseya Server installation.

- [TCP 25](#) - Used to send email alert notifications.
- [TCP 80 \(HTTP\) or TCP 443 \(HTTPS\)](#) - Enables system administrators to connect to Kaseya web pages for remote management.
- [TCP 1433 and UDP 1434](#) - If your SQL Server is on a separate system, you may have to open TCP port 1433 and UDP port 1434 on the KServer and SQL Server machines. Other ports may be required for non-default SQL Server instances.

Installing SQL Server

SQL Server (All Editions)

- *Ensure that SQL Server operating system has the latest Service Packs and is fully patched beforehand.*
- Make sure SQL server is set to [Mixed Mode Authentication](#) and not Windows Authentication.
- SQL must be in Compatibility Mode 90 (SQL 2005) or greater to support .NET Assemblies.

Prerequisite Installs

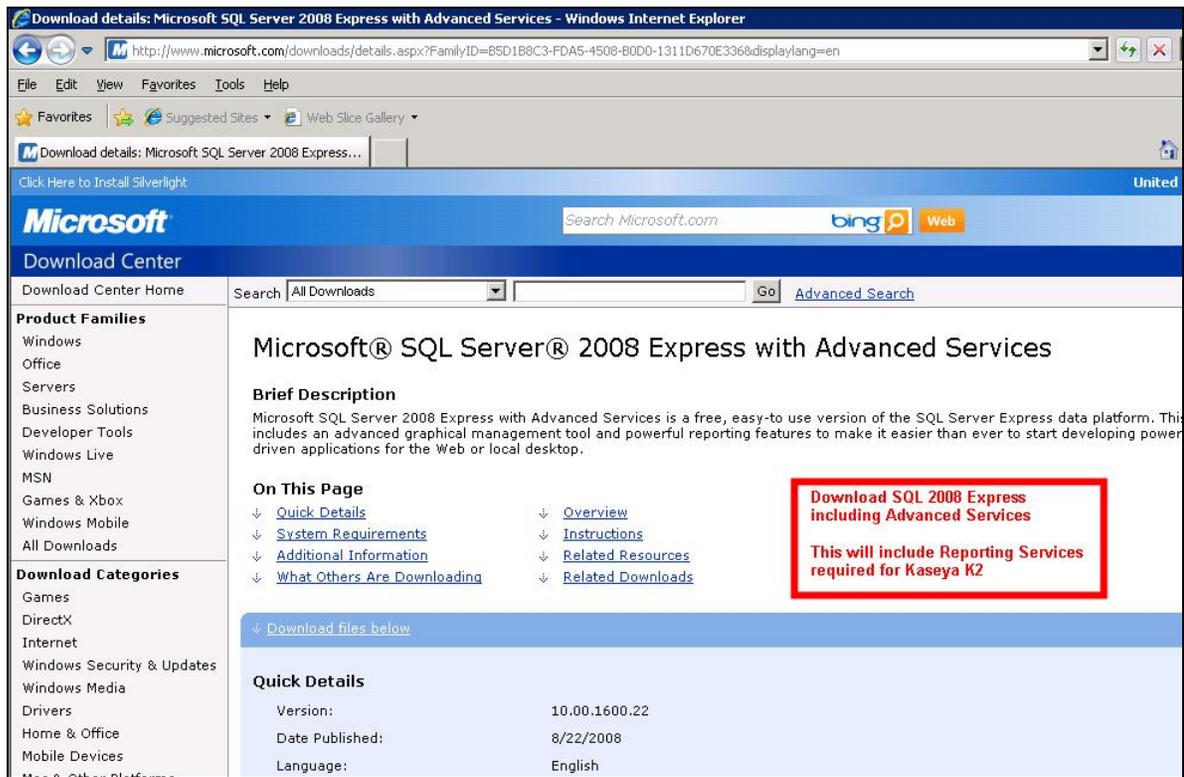
- `sp_dbcmptlevel 'ksubscribers'` - Running this stored procedure displays the compatibility level.
- `sp_dbcmptlevel 'ksubscribers', 90` - Running this stored procedure sets the compatibility level to SQL 2005. *If you are using SQL Server 2008, do not run this stored procedure.*
- If your SQL Server is on a separate system, you may have to open TCP Port 1433 and UDP Port 1434. Other ports may be required for non-default instances of SQL Server.
- If your SQL Server is on a separate system, ensure the following services use Network Service logons.
 - SQL Server Service
 - SQL Server Browser
- Set collation to `SQL_Latin1_General_CP1_CI_AS`. Earlier versions of Kaseya allowed different collations to be used. If you are updating to 6.0 from an earlier version of Kaseya and using a collation other than `SQL_Latin1_General_CP1_CI_AS` :
 - Install SQL Server using the `SQL_Latin1_General_CP1_CI_AS` collation. You cannot select the collation for SQL Server after it is installed. If necessary, uninstall SQL Server entirely, then reinstall SQL Server using this collation.
 - Restore the `ksubscribers` database into SQL Server and set the `ksubscribers` collation to `SQL_Latin1_General_CP1_CI_AS`.
- When SQL Server is on a separate system, ensure the SQL Server system and Kserver system are synchronized to within a couple of minutes of each other. A time service is recommended.

SQL Express Edition

If you are using SQL Express Edition, download the version with **Advance Services**, which includes Reporting Services.

The screenshot shows the Microsoft Download Center page for Microsoft SQL Server 2005 Express Edition with Advanced Services. The browser address bar shows the URL: `http://www.microsoft.com/downloads/details.aspx?familyid=4C6BA9FD-319A-4867-BC75-3B02B5E46A40&displaylang=en`. The page title is "Microsoft SQL Server 2005 Express Edition with Advanced Services". The "Download" button is highlighted with a red box, and a red arrow points to it from a callout box that says "Download SQL Express 2005 Advanced Edition. This will include Reporting Services required for Kaseya K2". The "Quick Details" section shows the file name: `SQLEXPB_ADV.EXE`.

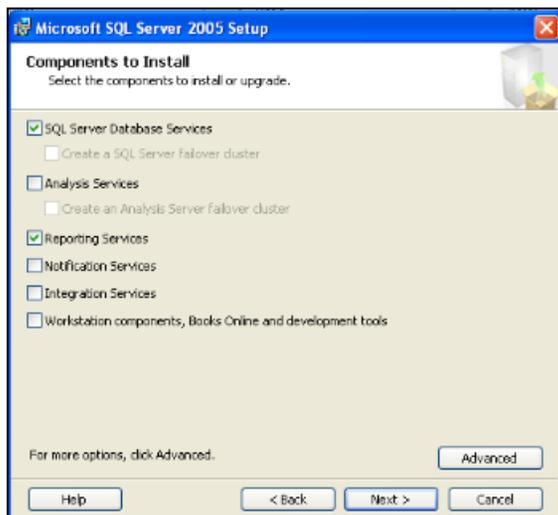
Prerequisite Installs



Installing Reporting Services

During installation of SQL Server 2005 and SQL Server 2008 you will see a dialog like the following. *Make sure Reporting Services is checked.*

Note: K2 validates Reporting Services is installed before starting the K2 install.



Configuring SQL Server Reporting Services

- Ensure SQL Server is installed *with Reporting Services*.
- To ensure that you have prepared Reporting Services for K2 see Kaseya KB article 310686 (<http://help.kaseya.com/WebHelp/KB-Article.asp?310686>).
- If SQL Server 2005 x64 is installed locally on Windows Server 2003 x64 (IIS 6), you need to uninstall the x64 SSRS and install x86 SSRS. Review the following Microsoft KB article for details: Configuring Kaseya VSA 6.x with Windows Server 2003 x64 running SQL Server 2005 x64 ([http://msdn.microsoft.com/en-us/library/ms143293\(SQL.90\).aspx](http://msdn.microsoft.com/en-us/library/ms143293(SQL.90).aspx))
- Other articles that may be of some interest include:
 - MS Reporting Services 2008 Deployment (<http://technet.microsoft.com/en-us/library/bb522791.aspx>)
 - MS Reporting Services 2005 Deployment ([http://technet.microsoft.com/en-us/library/ms159868\(SQL.90\).aspx](http://technet.microsoft.com/en-us/library/ms159868(SQL.90).aspx))
 - Installing and Configuring SQL Server 2005 Reporting Services (<http://weblogs.asp.net/akjoshi/archive/2008/06/06/Installing-and-configuring-sql-server-2005-reporting-services.aspx>)
- Verify Reporting Services installation by browsing to the Report Server. This URL is required by the VSA installation.
 - Assuming a localhost installation, use <http://localhost/ReportServer>. You should get a Reporting Services home page without needing to authenticate.
 - If SQL is on a separate server, this page needs to be accessible from the VSA server using <http://<SSRS-system-name>/ReportServer>.
 - If you are not using the default instance, the URL will become [http://localhost/<SSRS-system-name\\$InstanceName>](http://localhost/<SSRS-system-name$InstanceName>).

Note: See [Specifying the SSRS URL in the Kaseya SSRS Configuration user guide](http://help.kaseya.com/WebHelp/EN/VSA/6010000/EN_SSRSGuide61.pdf) (http://help.kaseya.com/WebHelp/EN/VSA/6010000/EN_SSRSGuide61.pdf).

Installing a New K2 Kaseya Server

Note: Do not proceed with the Kaseya installation unless the Pre-Install Checklist (*page 4*) has been completed.

Anti-Virus Software

On both the Kserver and on the SQL Server:

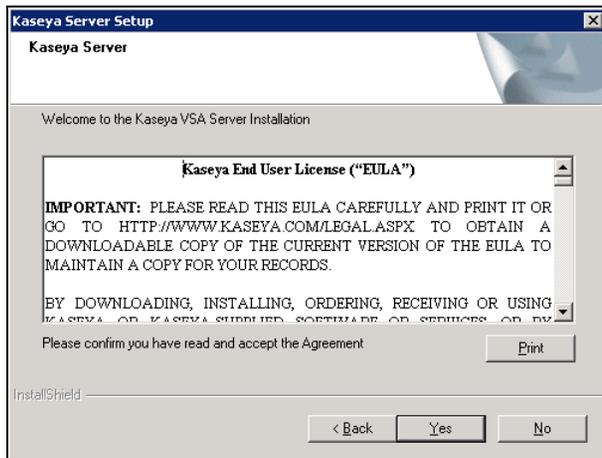
- Disable real time scanning for all anti-virus software
- Disable Data Execution Prevention (DEP), if necessary, using the System dialog box in Control Panel.

Remember to enable these features after the installation is complete.

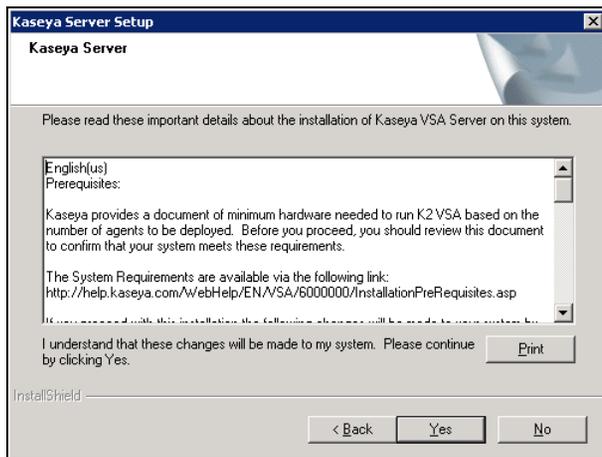
K2 Installation Steps

The Kaseya installation package automates most setup actions. However, some basic user interaction is required. Follow the steps below.

1. Logon to the install machine as an *administrator*.
2. Disable [anti-virus software](#) (*page 14*) protection.
3. Download the update file `KaseyaVSA.exe`
(<http://www.kaseya.com/forms/welcomek2v61.aspx>).
4. Start the install.
 - **For Windows 2008 Servers only** - You must start the install by right clicking `KaseyaVSA.exe` and selecting the **Run as Administrator** option to install `KaseyaVSA.exe`.
5. The first page of the install wizard displays. Confirm your agreement with the changes that will be made to your system, as specified in this dialog.



6. Review the prerequisites for installing K2.



The complete contents of this dialog follow:

Prerequisites:

Kaseya provides a document of minimum hardware needed to run K2 VSA based on the number of agents to be deployed. Before you proceed, you should review this document to confirm that your system meets these requirements.

The System Requirements are available via the following link:

<http://help.kaseya.com/WebHelp/EN/VSA/6010000/InstallationPreRequisites.asp>

If you proceed with this installation the following changes will be made to your system by the installer.

- Default web site will host Kaseya
- IIS Security settings will be altered
- IIS virtual directories will be added

SQL Server:

- CLR will be enabled
- ksubscribers database will be added
- Memory settings will be changed
- Logins will be added.

The installer is also going to check for the following software components:

- Microsoft .NET Framework 3.5 installed
- Microsoft .NET Framework 2.0 installed
- Microsoft Message Queuing (MSMQ) enabled
- Microsoft SQL Server installed on this or a remote server.
- Microsoft SQL Server Reporting Services installed and operational.
- Compatible Microsoft SQL Server Versions:

- SQL Server 2005 - SP3, or
- SQL Server 2005 Express with Advanced Services - SP3, or
- SQL Server 2008 - SP1, or
- SQL Server 2008 Express with Advanced Services - SP1

If any of these software components are not available, please exit and make the necessary adjustments to your system before you proceed with the installation.

When upgrading from a previous version, you must review and follow the documented Upgrade Guide. This includes making a full backup of your production system.

For a fresh installation, an Installation Guide is provided. You should review the guide before you proceed.

The Upgrade Guide and the Installation Guide are available via the following link:

<http://help.kaseya.com/WebHelp/EN/VSA/6010000/installationGuide.asp>

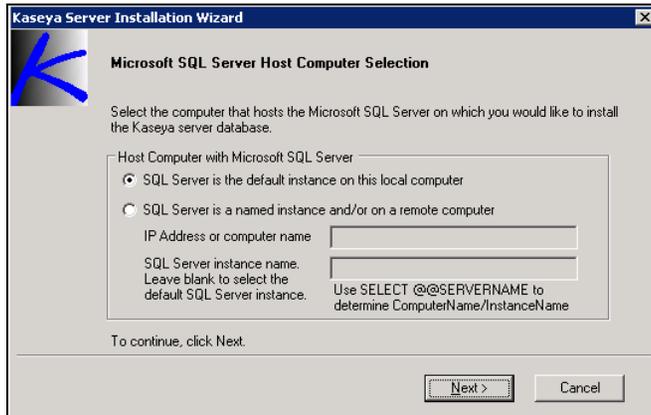
You will also find an informative installation video at the following link:

<http://help.kaseya.com/WebHelp/EN/VSA/6010000/installationVideo.asp>

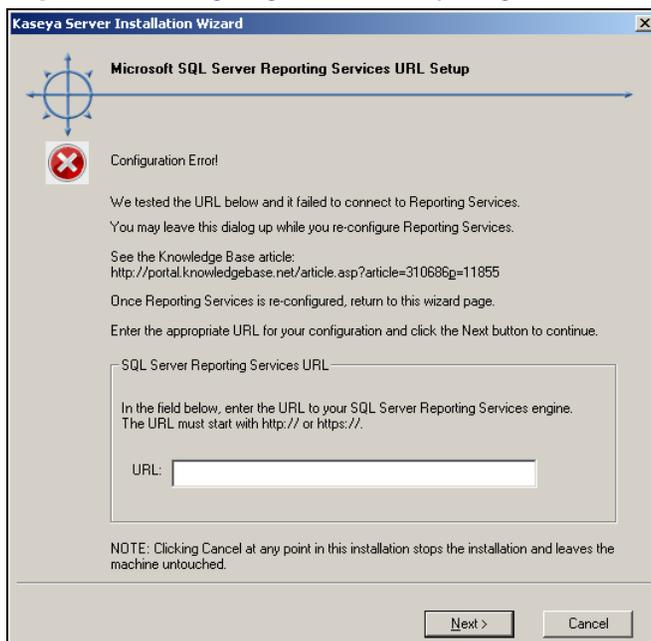
If your system meets all of these requirements, press Next; otherwise, press Cancel and make the necessary adjustments before you proceed.

Installing a New K2 Kaseya Server

7. Select the location of the SQL Server and the instance name to use for the Kaseya database.
 - Select the first option **SQL Server is the default instance on this local computer** you are using the default SQL Instance on the local machine
 - Select the second option **SQL Server is a named instance and/or on a remote computer** if you are using a remote machine, or a named instance on the local computer. Enter the computer name—not "." or "localhost" or "127.0.0.1"—and the instance name.

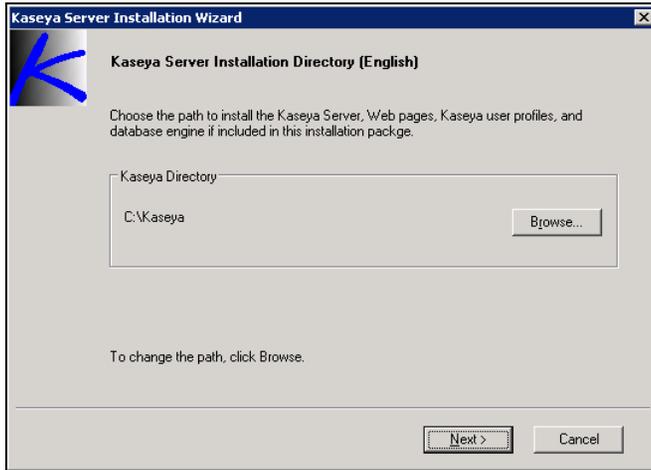


8. If the install is unable to connect to the SQL Server Reporting Services engine for some reason, the following wizard page displays. Specify the URL of your SQL Server Reporting Services engine. See [Configuring SQL Server Reporting Services](#) (page 14) for details.



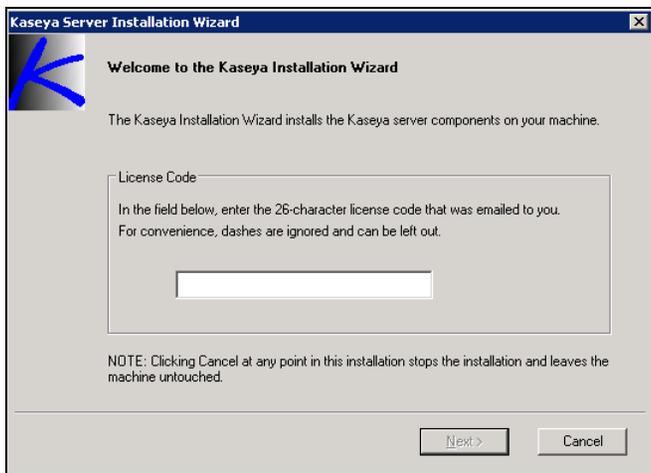
Installing a New K2 Kaseya Server

- The installation application prompts you to select the location for Kaseya Server files to be installed. The installation path may not contain any spaces.

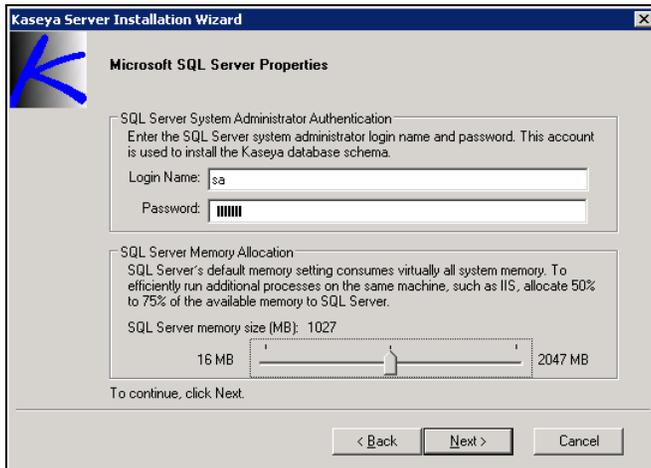


- Enter the license. If you do not have a license key, contact your Kaseya sales representative.

Note: The Next button will remain grey until a valid 26-character code has been entered.



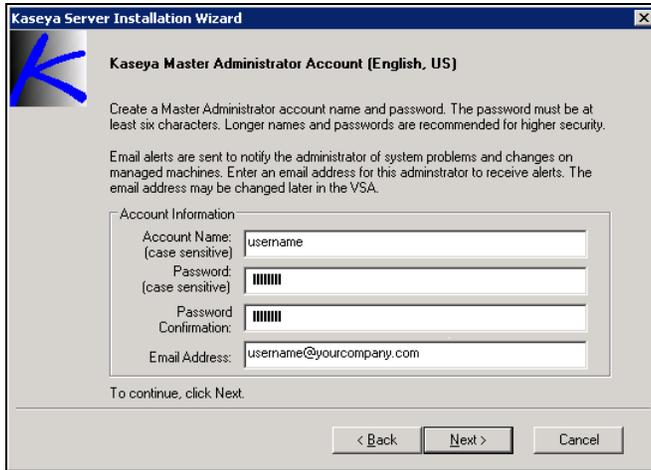
- Once the license code has been accepted, the database configuration dialog is displayed. SQL Server requires SA user rights to install the database. Enter the SQL system administrator user name (sa) and password. Kaseya recommends accepting the default SQL Memory Size.



Installing a New K2 Kaseya Server

12. The system prompts you to enter a Kaseya VSA User and Password. This creates a user with a Master role and a Master scope. Both the user name and password are case sensitive.

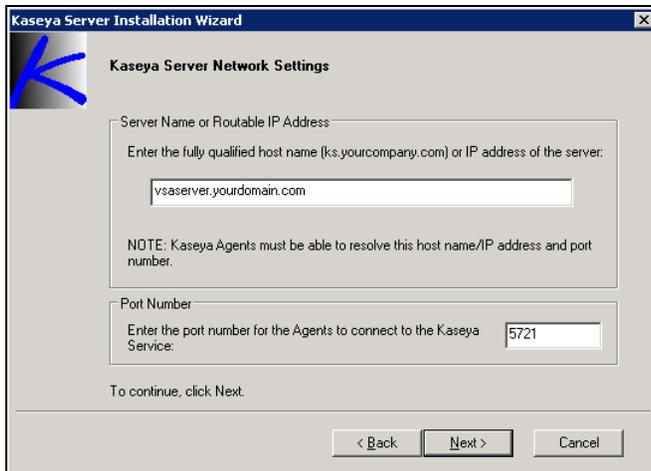
Note: This is the *Kaseya* user name, not a *database* user name.



The screenshot shows the 'Kaseya Master Administrator Account (English, US)' window. It contains instructions for creating a Master Administrator account name and password. The 'Account Information' section includes fields for Account Name (username), Password (masked with asterisks), Password Confirmation (masked with asterisks), and Email Address (username@yourcompany.com). Navigation buttons for Back, Next, and Cancel are at the bottom.

13. Enter the host name or IP address of the Kaseya Server. The host name should be resolvable by all systems on the local network and across the internet. Kaseya agents will use this name or IP address to communicate with the KServer. The user has the option of changing the default port number that Kaseya agents use to connect to the Kaseya Service. The port number can also be changed after installation.

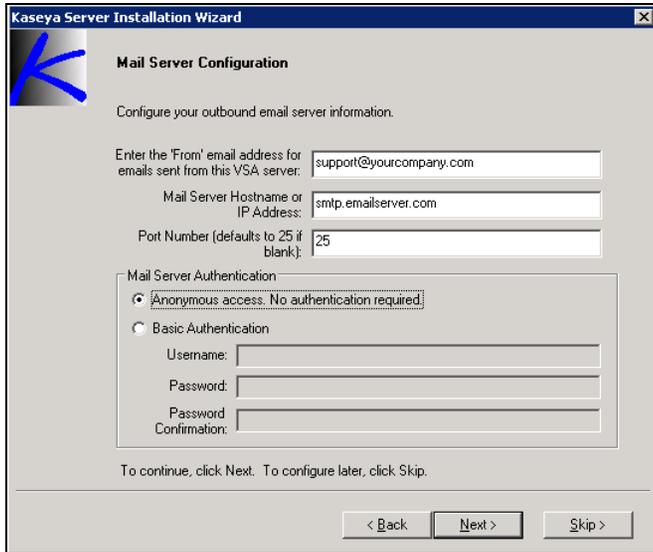
Note: Do not set the Port Number to 80. Port 80 is already used by IIS and will result in conflict. Best Practices: Although a public IP address may be used, Kaseya recommends using a domain name server (DNS) name for the KServer. This practice is recommended as a precaution should the IP address need to change. It is easier to modify the DNS entry than redirecting orphaned agents.



The screenshot shows the 'Kaseya Server Network Settings' window. It prompts for the 'Server Name or Routable IP Address' (vsaserver.yourdomain.com) and the 'Port Number' (5721). A note states: 'NOTE: Kaseya Agents must be able to resolve this host name/IP address and port number.' Navigation buttons for Back, Next, and Cancel are at the bottom.

Installing a New K2 Kaseya Server

14. Specify outbound email server information. Enter a valid email address. This address is used as the 'reply to' address for messages sent from the Kaseya Server. Kaseya recommends using the address for the ticketing system or a group distribution address. Do not use a personal email address. A common choice is `support@yourcompany.com`.



The screenshot shows the 'Mail Server Configuration' window of the Kaseya Server Installation Wizard. It contains the following fields and options:

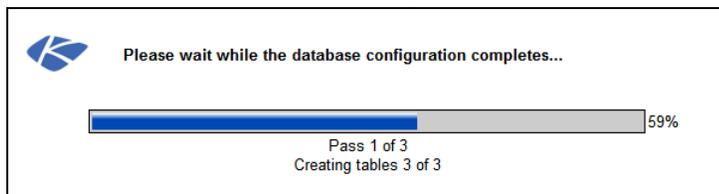
- From' email address for emails sent from this VSA server:** `support@yourcompany.com`
- Mail Server Hostname or IP Address:** `smtp.emailserver.com`
- Port Number (defaults to 25 if blank):** `25`
- Mail Server Authentication:**
 - Anonymous access. No authentication required.**
 - Basic Authentication**
 - Username: _____
 - Password: _____
 - Password Confirmation: _____

At the bottom, there are three buttons: '< Back', 'Next >', and 'Skip >'. A note at the bottom of the window reads: 'To continue, click Next. To configure later, click Skip.'

Enter in the following information, if available.

Note: If you want to specify outbound email settings after the update you can set them from within the VSA using `System > Outbound Email`. A confirmation message box displays if you leave these fields blank and click the Next button.

- **Enter the 'From' email address for emails sent from this VSA server:** - Enter the default 'From' address displayed by outbound email.
 - **Mail Server Hostname or IP Address** - The name of the host email server. Example: `smtp.gmail.com`.
 - **Port** - Typically 25, but the host email server may require a different port number.
 - **Anonymous access** - No authentication required.
 - **Basic Authentication** - Authentication required.
 - ✓ **User Name** - Enter the username of an account authorized to use the host email server.
 - ✓ **Password** - Enter the password of the account.
 - ✓ **Password Confirmation** - Re-enter the password of the account.
15. The Install Shield portion of the install runs to completion without further user input. This usually takes about 10 to 20 minutes depending on the speed of your machine.
After the Install Shield portion of the installation completes, a browser opens and downloads any hotfixes that have been made to the system since the release of this version of Kaseya. Then `Reapply-Schema` runs, which upgrades and installs the new database schema.



16. Upon completion of the installation, a web browser window displays the logon page. Logon using the username and password you entered in [step 12](#) ([page 20](#)) above.

Note: See [Create a New Master User](#) ([page 22](#)) if you are unable to logon successfully.

Kaseya
Our Automation. Your Liberation.™
Kaseya Evaluation Edition

Enter Your Username and Password

Username

Password

Remember my username on this computer

System Version
5.9.2.34

[Getting Started](#)
[Forgot Password?](#)

System Status
Operational

Customer ID
TESTDG

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[Software and Services T&Cs](#)

Note: For assistance with any installation errors, contact Kaseya support using <https://portal.kaseya.net> (<https://portal.kaseya.net>) and include a full description of the issue and attach the Kaseya installation log found at `%WINDIR%\kaseya.html`.

17. Re-enable anti-virus software ([page 14](#)) protection.
18. Finalize and test your new installation ([page 42](#)).

Create a New Master User

Forgotten User Password

If you have forgotten your master user account password, the system provides a way for you to create a new master user account, which enables you to log back in to the system and retrieve the forgotten account information. A master user is a VSA user that uses a `Master` user role and a `Master` scope.

Note: You must have administrator privileges on the KServer. Due to security reasons, you cannot perform the following procedure remotely.

To create a new master user account:

1. Log in to the machine running the KServer.
2. Access the following web page:
`http://localhost/LocalAuth/setAccount.asp`
3. Enter a new account name in the `Master User Name` field.
4. Enter a password in the `Enter Password` field and confirm it by re-typing it in the `Confirm Password` field.
5. Click `Create`.

You will now be logged in to the system as a new master user.

Changing the User Password

Change the user password for the original user logon using `System > Users`.

Installing Add-on Modules to a New K2 Installation

If you are installing any add-on modules for the first time with this release, you can download the add-on modules from the following locations.

Backup

- <http://download.kaseya.com/components/kbu/KBUinstall.exe>

Desktop Policy and Migration, previously called Kaseya User State Management

- <http://download.kaseya.com/components/kdpm/KDPM.exe>

Endpoint Security

- <http://download.kaseya.com/components/kes/KES.exe>

Service Desk

- <http://download.kaseya.com/components/sd/SDinstall.exe>

Network Discovery

- <http://download.kaseya.com/components/knd/KNDinstall.exe>

Antivirus

- <http://download.kaseya.com/components/kav/KAVinstall.exe>

Anti-Malware

- <http://download.kaseya.com/components/kam/KAMinstall.exe>

Service Billing (Release Candidate)

- <http://download.kaseya.com/components/ksb/KSBinstall.exe>

Enterprise Management (to be released)

- <http://download.kaseya.com/components/kem/KEMinstall.exe>

Policy Management (to be released)

- <http://download.kaseya.com/components/kpm/KPMinstall.exe>

Directory Services (to be released)

- <http://download.kaseya.com/components/kds/KDSinstall.exe>

Online Backup (to be released)

- <http://download.kaseya.com/components/kob/KOBinstall.exe>

Reporting Installer Problems

If you encounter installation issues...

For Installer Problem *Prior to Reapply Schema*

1. [Screenshot the error](#) - Edit, select all, copy, paste to Wordpad.
2. Locate in Windows the Kaseya `html` file and copy it.
3. Attach screenshot and file to the ticket.
4. Provide the system configuration: OS, DB, WEB OS.
5. If the install is broken, most of the time we cannot use the agents or other mechanisms to get to the machine. Provide RDP access for installer issues: machine name, user and password.
6. [Leave the process running at the point of error.](#)

For Installer Problem *During Reapply Schema*

1. [Screenshot the error](#) - Edit, select all, copy, paste to Wordpad.
2. Locate the files in `<KaseyaRoot>\DBInstall\TempFiles`
3. Attach screenshot and files to the ticket.
4. Identify the Pass number where reapply encountered an error.
5. Provide the system configuration: OS, DB, WEB OS.
6. Provide remote access login information: machine name,user and password
7. [Leave the process running at the point of error.](#)

Updating an Existing KServer to K2

Use one of the following two procedures to update your existing Kaseya Server:

- [Updating the Kaseya Serving on the Same Machine](#) (page 25)
- [Updating the Kaseya Server while Moving to New Hardware](#) (page 37)

Note: Upgrading from 5.1 to 6.0.1 does not migrate Monitor 95th Percentile reports. These reports will have to be recreated in 6.0.1.

Updating the Kaseya Server on the Same Machine

Perform the following procedures to update the Kaseya Server on the same machine.

Pre-Update Checklist

Note: Do not proceed with the Kaseya update unless the Pre-Install Checklist (page 4) and Pre-Update Checklist (page 25) have been completed.

<input type="checkbox"/>	Identify the license code of your existing Kaseya Server.
<input type="checkbox"/>	Make a full backup your Kaseya server (page 26) (and database servers if SQL is running on a separate machine)
<input type="checkbox"/>	Ensure you are prepared to revert back to your full backup to avoid disruption to your production system, if you encounter issues as a result of the upgrade.
<input type="checkbox"/>	Separately backup the <code>ksubscribers</code> database and your Kaseya Server User directories. See Backup Kaseya VSA Server (page 26) for more information.
<input type="checkbox"/>	If migrating from 5.x to 6.x, decide how you want organizations to be created when updating from an earlier version of Kaseya. You should carefully review this configuration option before beginning the update. It is described in detail in step 9 of K2 Update Steps (page 30).
<input type="checkbox"/>	If migrating from 5.x to 6.x, block agents from checking into the server until you are satisfied the data conversion is correct.
<input type="checkbox"/>	If migrating from 5.x to 6.x, identify the settings used to define any Monitor 95th Percentile reports in your 5.x VSA. These reports will have to be recreated in 6.0.1.change
<input type="checkbox"/>	Schedule the update (page 26).
<input type="checkbox"/>	Disable anti-virus security protection (page 26) just before beginning the update.

Backup the Kaseya Server

Always ensure that you have a complete backup of your Kaseya production system. This includes:

- The system hosting your Kaseya Server.
- The SQL Server system hosting the `ksubscribers` database, if SQL Server is running remotely from the Kaseya Server.

Scheduling the Update

If updating an existing KServer, ensure that you schedule a downtime window that allows enough time for running the update, testing, and restoring the system back to its original state, if necessary. The Kserver will be stopped for the duration of the update and will be unavailable for agents, machine users or VSA Administrators.

- Updating from v4.x or v5.x to K2 may take *several hours* depending on DB size and server specification.
- Updating from Kaseya 2008 or K2 should take less than 30 minutes, as the DB changes are fewer.

Anti-Virus Software

On both the Kserver and on the SQL Server:

- Disable real time scanning for all anti-virus software
- Disable Data Execution Prevention (DEP), if necessary, using the System dialog box in Control Panel.

Remember to enable these features after the installation is complete.

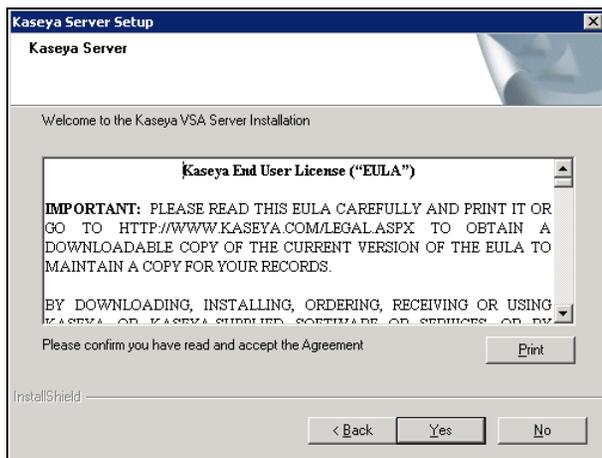
Updating from 5.1 to 6.1

The Kaseya update package automates most setup actions. However, some basic user interaction is required. Follow the steps below.

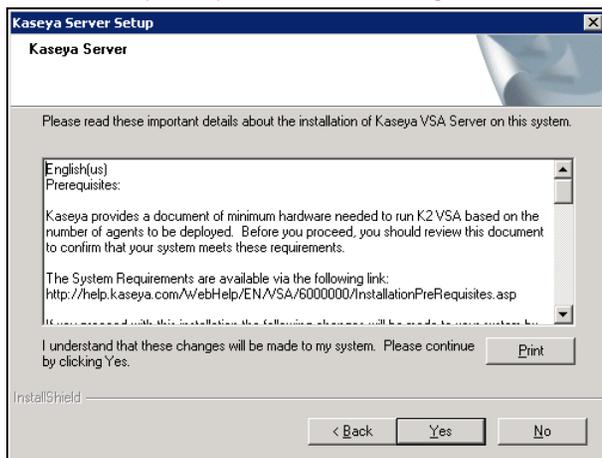
1. Logon to the install machine as an *administrator*.
2. Disable [anti-virus software](#) (*page 26*) protection.
3. Download the update file `KaseyaVSA.exe`
(<http://www.kaseya.com/forms/welcomek2v61.aspx>).

Note: The same `KaseyaVSA.exe` file is used to either install a new VSA or update an existing VSA.

4. Start the update.
 - For Windows 2008 Servers only - You must start the update by right clicking `KaseyaVSA.exe` and selecting the **Run as Administrator** option.
5. The first page of the update wizard displays. Confirm your agreement with the changes that will be made to your system, as specified in this dialog.



6. Review the prerequisites for installing K2.



Updating an Existing KServer to K2

The complete contents of this dialog follow:

Prerequisites:

Kaseya provides a document of minimum hardware needed to run K2 VSA based on the number of agents to be deployed. Before you proceed, you should review this document to confirm that your system meets these requirements.

The System Requirements are available via the following link:

<http://help.kaseya.com/WebHelp/EN/VSA/6010000/InstallationPreRequisites.asp>

If you proceed with this installation the following changes will be made to your system by the installer.

- Default web site will host Kaseya

- IIS Security settings will be altered

- IIS virtual directories will be added

SQL Server:

- CLR will be enabled

- ksubscribers database will be added

- Memory settings will be changed

- Logins will be added.

The installer is also going to check for the following software components:

- Microsoft .NET Framework 3.5 installed

- Microsoft .NET Framework 2.0 installed

- Microsoft Message Queuing (MSMQ) enabled

- Microsoft SQL Server installed on this or a remote server.

- Microsoft SQL Server Reporting Services installed and operational.

Compatible Microsoft SQL Server Versions:

- SQL Server 2005 - SP3, or

- SQL Server 2005 Express with Advanced Services - SP3, or

- SQL Server 2008 - SP1, or

- SQL Server 2008 Express with Advanced Services - SP1

If any of these software components are not available, please exit and make the necessary adjustments to your system before you proceed with the installation.

When upgrading from a previous version, you must review and follow the documented Upgrade Guide. This includes making a full backup of your production system.

For a fresh installation, an Installation Guide is provided. You should review the guide before you proceed.

The Upgrade Guide and the Installation Guide are available via the following link:

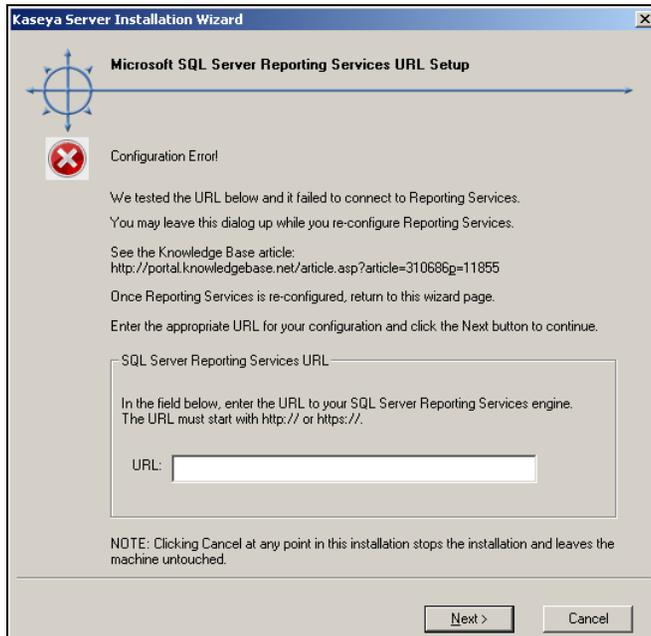
<http://help.kaseya.com/WebHelp/EN/VSA/6010000/installationGuide.asp>

You will also find an informative installation video at the following link:

<http://help.kaseya.com/WebHelp/EN/VSA/6010000/installationVideo.asp>

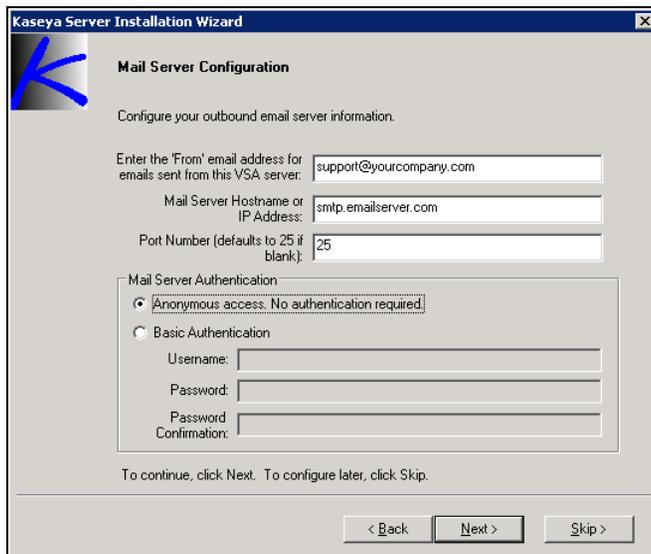
If your system meets all of these requirements, press Next; otherwise, press Cancel and make the necessary adjustments before you proceed.

- If the install is unable to connect to the SQL Server Reporting Services engine for some reason, the following wizard page displays. Specify the URL of your SQL Server Reporting Services engine. See [Configuring SQL Server Reporting Services](#) (page 14) for details.



- Specify outbound email server information. *This information will be filled in for you if you have already specified outbound email in your previous version of Kaseya.*

Note: This wizard page does not display if you are performing an update of an existing K2 environment and outbound email is already defined.



If these outbound email fields are blank, enter in the following information, if available.

Note: If you want to specify outbound email settings after the update you can set them from within the VSA using **System > Outbound Email**.

- Enter the 'From' email address for emails sent from this VSA server: - Enter the default 'From' address displayed by outbound email.

Updating an Existing KServer to K2

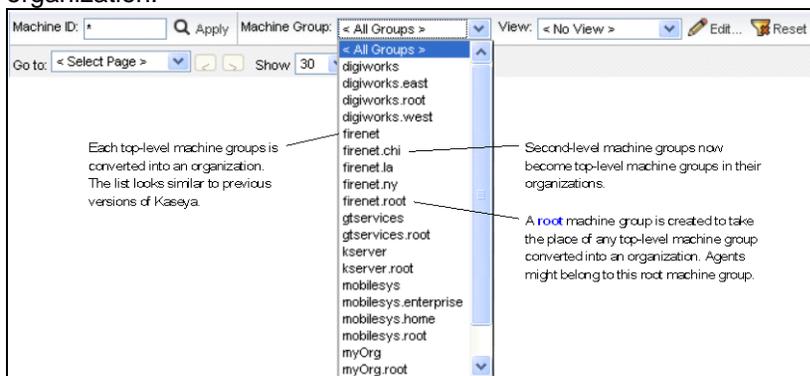
- **Mail Server Hostname or IP Address** - The name of the host email server. Example: smtp.gmail.com.
 - **Port** - Typically 25, but the host email server may require a different port number.
 - **Anonymous access** - No authentication required.
 - **Basic Authentication** - Authentication required.
 - ✓ **User Name** - Enter the username of an account authorized to use the host email server.
 - ✓ **Password** - Enter the password of the account.
 - ✓ **Password Confirmation** - Re-enter the password of the account.
9. If you are upgrading from v5.x you will have to decide how organizations will be created for existing machine groups.

User security for K2 requires all machine groups belong to an organization. The K2 update creates organizations for machine groups automatically.

Create Multiple Organizations, One for Each Top-Level Machine Group

Use this option if most of your existing machine groups represent external customers.

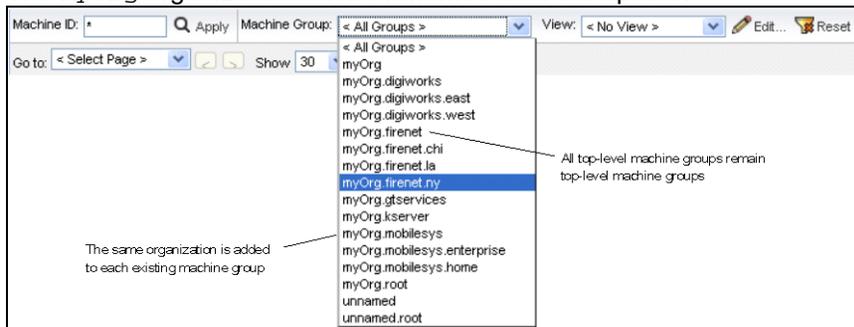
- Each top-level machine group is converted into its own organization.
- Machine group listings appear similar to the way they looked in earlier versions of the VSA.
- A special `root` machine group is created to take the place of a top-level machine group converted into an organization. The `root` machine group contains any agents that belonged to the top-level machine group that is now being converted into an organization.
- Second-level machine groups now become top-level machine groups in their organizations.



Create a Single Organization

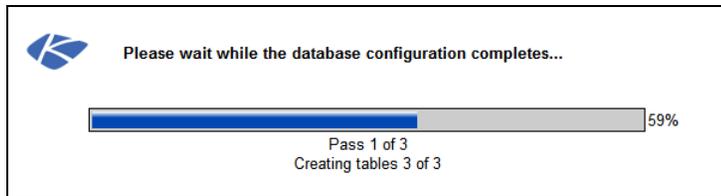
Use this option if most of your existing machine groups belong to the same organization.

- All machine groups are added to a single `myOrg` organization, representing your own organization.
- The `myOrg` organization can be renamed after the update.



Updating an Existing KServer to K2

10. The Install Shield portion of the install runs to completion without further user input. This usually takes about 10 to 20 minutes depending on the speed of your machine. After the Install Shield portion of the install completes, the install begins downloading hotfixes and reapplying the database schema, which occurs in three passes. This will take some time.



11. Upon completion of the installation, a web browser window displays the logon page. Logon using any username and password the existed in your previous version of Kaseya.



Note: For assistance with any installation errors, contact Kaseya support using <https://portal.kaseya.net> (<https://portal.kaseya.net>) and include a full description of the issue and attach the Kaseya installation log found at %WINDIR%\kaseya.html.

12. Re-enable anti-virus software (page 26) protection.
13. Finalize and test your new installation (page 42).

Updating from 6.x to 6.1

The Kaseya update package automates most setup actions. However, some basic user interaction is required. Follow the steps below.

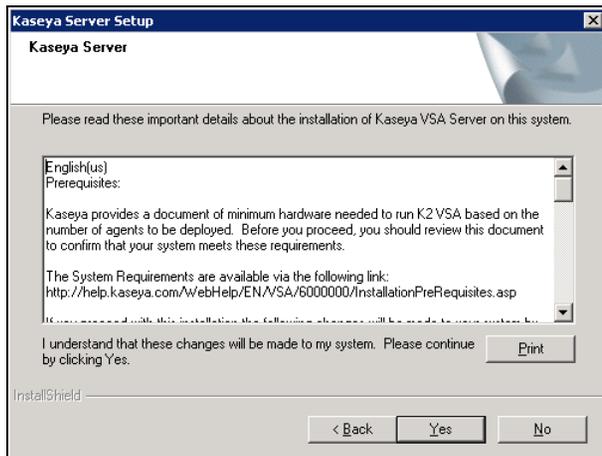
1. Logon to the install machine as an *administrator*.
2. Disable [anti-virus software](#) (*page 26*) protection.
3. Download the update file `KaseyaVSA.exe`
(<http://www.kaseya.com/forms/welcomek2v61.aspx>).

Note: The same `KaseyaVSA.exe` file is used to either install a new VSA or update an existing VSA.

4. Start the update.
 - **For Windows 2008 Servers only** - You must start the update by right clicking `KaseyaVSA.exe` and selecting the **Run as Administrator** option.
5. The first page of the update wizard displays. Confirm your agreement with the changes that will be made to your system, as specified in this dialog.



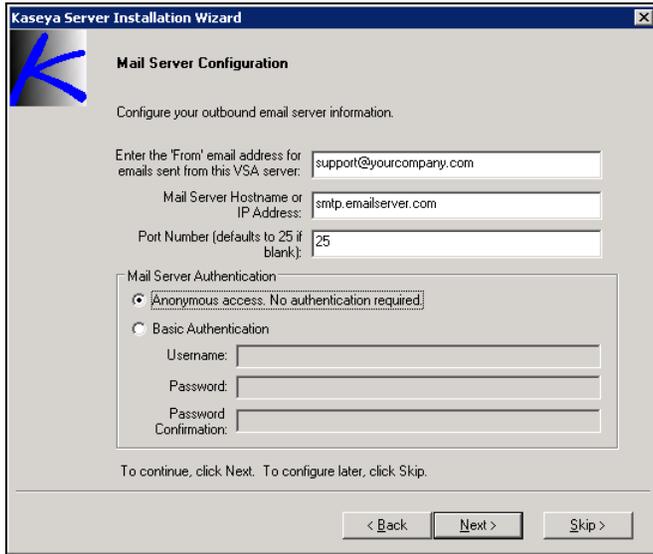
6. Review the prerequisites for installing K2.



Note: See *K2 Installation Steps - Step 5 (page 16)* for all the text displayed on this wizard page. You can also print all the text using this wizard page.

Updating an Existing KServer to K2

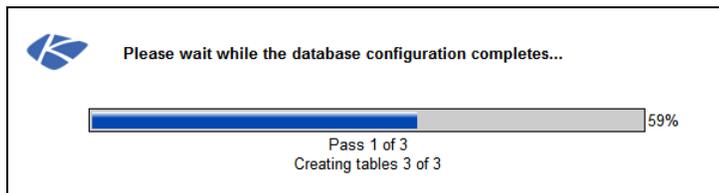
7. A Mail Server Configuration wizard page does not display if you are performing an update of an existing K2 environment and outbound email is already defined.



The screenshot shows the 'Mail Server Configuration' window of the Kaseya Server Installation Wizard. The window title is 'Kaseya Server Installation Wizard'. The main heading is 'Mail Server Configuration'. Below the heading, it says 'Configure your outbound email server information.' There are three input fields: 'Enter the 'From' email address for emails sent from this VSA server:' with the value 'support@yourcompany.com', 'Mail Server Hostname or IP Address:' with the value 'smtp.emailserver.com', and 'Port Number (defaults to 25 if blank):' with the value '25'. Under 'Mail Server Authentication', there are two radio buttons: 'Anonymous access. No authentication required.' (which is selected) and 'Basic Authentication'. Below the radio buttons are three input fields: 'Username:', 'Password:', and 'Password Confirmation:'. At the bottom, there is a note: 'To continue, click Next. To configure later, click Skip.' and three buttons: '< Back', 'Next >', and 'Skip >'.

Note: See K2 Installation Steps - Step 13 (page 20) if the Mail Server Configuration wizard page displays and you want further information on how to configure outbound email immediately. You can also configure outbound email after the update within the VSA using System > Outbound Email.

8. The Install Shield portion of the install runs to completion without further user input. This usually takes about 10 to 20 minutes depending on the speed of your machine. After the Install Shield portion of the install completes, the install begins downloading hotfixes and reapplying the database schema, which occurs in three passes. This will take some time.



Updating an Existing KServer to K2

9. Upon completion of the installation, a web browser window displays the logon page. Logon using any username and password the existed in your previous version of Kaseya.

Kaseya
Our Automation. Your Liberation.™
Kaseya Evaluation Edition

Enter Your Username and Password

Username

Password

Remember my username on this computer

System Version
5.9.2.34

Getting Started
[Forgot Password?](#)

System Status
Operational

Customer ID
TESTDG

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Note: For assistance with any installation errors, contact Kaseya support using <https://portal.kaseya.net> (<https://portal.kaseya.net>) and include a full description of the issue and attach the Kaseya installation log found at %WINDIR%\kaseya.html.

10. Re-enable anti-virus software (page 26) protection.
11. Finalize and test your new installation (page 42).

Updating Add-on Modules

There is no need to run the individual add-on updates when updating your Kaseya Server using `KaseyaVSA.exe`. Any add-on modules already installed are automatically downloaded and updated. This includes:

- Backup & Disaster Recovery (BUDR)
- Kaseya Endpoint Security (KES)

Note: After K2 is installed, use the Security > Install/Remove > Verify Install button to update 5.x KES clients to K2 KES clients.

- User State Management (KUSM) - This module has been renamed. If you are licensed for KUSM and already have it installed, version 3.0 of Desktop Policy and Migration (KDPM) will be installed as part of the K2 update.
- Kaseya Service Desk (KSD) - This module was made available to beta users of K2.

Installing Add-on Modules For the First Time with this Release

If you are installing any add-on modules for the first time with this release, you can download the add-on modules from the following locations.

Backup

- <http://download.kaseya.com/components/kbu/KBUinstall.exe>

Desktop Policy and Migration, previously called Kaseya User State Management

- <http://download.kaseya.com/components/kdpm/KDPM.exe>

Endpoint Security

- <http://download.kaseya.com/components/kes/KES.exe>

Service Desk

- <http://download.kaseya.com/components/sd/SDinstall.exe>

Network Discovery

- <http://download.kaseya.com/components/knd/KNDinstall.exe>

Antivirus

- <http://download.kaseya.com/components/kav/KAVinstall.exe>

Anti-Malware

- <http://download.kaseya.com/components/kam/KAMinstall.exe>

Service Billing (Release Candidate)

- <http://download.kaseya.com/components/ksb/KSBinstall.exe>

Enterprise Management (to be released)

- <http://download.kaseya.com/components/kem/KEMinstall.exe>

Policy Management (to be released)

- <http://download.kaseya.com/components/kpm/KPMinstall.exe>

Directory Services (to be released)

- <http://download.kaseya.com/components/kds/KDSinstall.exe>

Online Backup (to be released)

- <http://download.kaseya.com/components/kob/KOBinstall.exe>

Reporting Installer Problems

If you encounter installation issues...

For Installer Problem *Prior to Reapply Schema*

1. [Screenshot the error](#) - Edit, select all, copy, paste to Wordpad.
2. Locate in Windows the Kaseya `html` file and copy it.
3. Attach screenshot and file to the ticket.
4. Provide the system configuration: OS, DB, WEB OS.
5. If the install is broken, most of the time we cannot use the agents or other mechanisms to get to the machine. Provide RDP access for installer issues: machine name, user and password.
6. [Leave the process running at the point of error.](#)

For Installer Problem *During Reapply Schema*

1. [Screenshot the error](#) - Edit, select all, copy, paste to Wordpad.
2. Locate the files in `<KaseyaRoot>\DBInstall\TempFiles`
3. Attach screenshot and files to the ticket.
4. Identify the Pass number where reapply encountered an error.
5. Provide the system configuration: OS, DB, WEB OS.
6. Provide remote access login information: machine name,user and password
7. [Leave the process running at the point of error.](#)

Updating the Kaseya Server while Moving to New Hardware

Rather than update your existing Kaseya Server on the same machine, you may wish to move your Kaseya Server to a new system and update it at the same time. Perform the following procedures instead of the steps described in [Updating the Kaseya Server on the Same Machine](#) (page 25).

Pre-Update Checklist

Warning: Do not proceed with the Kaseya update unless the [Pre-Install Checklist](#) (page 4) and [Pre-Update Checklist](#) have been completed.

<input type="checkbox"/>	Identify the license code of your existing Kaseya Server.
<input type="checkbox"/>	Make a full backup your Kaseya server (page 37) (and database servers if SQL is running on a separate machine)
<input type="checkbox"/>	Ensure you are prepared to revert back to your full backup to avoid disruption to your production system, if you encounter issues as a result of the upgrade.
<input type="checkbox"/>	Separately backup the <code>ksubscribers</code> database and your Kaseya Server User directories. See Archiving the Kaseya Server (page 39) for more information.
<input type="checkbox"/>	Schedule the update (page 37).
<input type="checkbox"/>	Disable anti-virus security protection (page 37) just before beginning the update.

Backup the Kaseya Server

Always ensure that you have a complete backup of your Kaseya production system. This includes:

- The system hosting your Kaseya Server.
- The SQL Server system hosting the `ksubscribers` database, if SQL Server is running remotely from the Kaseya Server.

Scheduling the Update

If updating an existing KServer, ensure that you schedule a downtime window that allows enough time for running the update, testing, and restoring the system back to its original state, if necessary. The Kserver will be stopped for the duration of the update and will be unavailable for agents, machine users or VSA Administrators.

- Updating from v4.x or v5.x to K2 may take *several hours* depending on DB size and server specification.
- Updating from Kaseya 2008 or K2 should take less than 30 minutes, as the DB changes are fewer.

Anti-Virus Software

On both the Kserver and on the SQL Server:

- Disable real time scanning for all anti-virus software
- Disable Data Execution Prevention (DEP), if necessary, using the System dialog box in Control Panel.

Remember to enable these features after the installation is complete.

Moving the Kaseya Server

Moving your existing Kaseya Server to a new machine involves copying selected files from your existing Kaseya Server to the new machine, then installing a new Kaseya Server over these files.

Take Your Existing Kaseya Server Offline

- Disable incoming email by checking the [Disable email reader](#) checkbox in Ticketing > Email Reader.
- Change the IP address of the network adaptor used by your *existing* Kaseya Server to an unused IP address. This prevents agents from checking in and prevents users from logging in.

Note: If you elect to run your *existing/old* Kaseya Server while you set up the *new* Kaseya Server with a new name and IP address, then you will need to redirect the agents using the [Agent > Check-in Control](#) page just prior to putting the *new* Kaseya Server online.

- If your *existing* Kaseya Server is 5.1 or earlier, disable SMTP on the localhost. If your *existing* Kaseya Server is 5.2 or later, change the port number using the System > Configure page.

Archive Your Existing Kaseya Server

- Perform the procedure for [Archiving the Kaseya Server](#) (page 39).

Copy Archived Data to Your New Machine

- Copy the files you archived in [Archiving the Kaseya Server](#) (page 39) to the machine that will be running your new Kaseya Server. Ensure the top folder of the archived folder tree matches the Kaseya install directory you intend to install into. The default is C:\Kaseya.
- Use SQL Server Management Studio to restore the `ksubscribers` database you archived in [Archiving the Kaseya Server](#) (page 39) to the machine that will be hosting your new SQL Server.

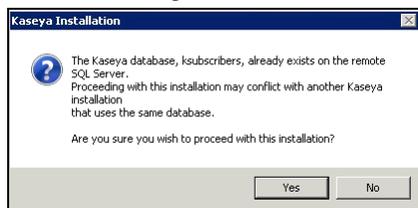
Note: Ensure the collation (page 11) for both SQL Server and the `ksubscribers` database is correct.
Note: After a restore of a 5.1 database, the SSRS URL will be invalid and need to be reset. After a restore of a 6.x database the SSRS URL may be invalid and need to be reset.

Install Kaseya on the New Machine

- Install a *new* Kaseya Server on your *new* machine by following the procedure described in [Installing a New K2 Kaseya Server](#) (page 14).

Note: Ensure all prerequisites are met before beginning the install.

- If you specify a SQL Server instance on a remote machine and it has a `ksubscribers` database, you will get a prompt asking you to confirm that you want to update, if necessary, that database and redirect it to the *new* Kaseya Server. Clicking [Yes](#) to this prompt will take the database away from the *existing* Kaseya Server using it and redirect it to the *new* Kaseya Server you are installing.



Put Your New Kaseya Server Online

- In the VSA of your *new* Kaseya Server, uncheck the [Disable email reader](#) checkbox in Ticket > Email Reader.
- If you didn't configure your outgoing email during the install, configure it using the System > [Outbound Email](#) page.

Updating an Existing KServer to K2

- Change the IP address of the network adaptor used by your *new* Kaseya Server to use the original IP address of your *existing* Kaseya Server. Agents will now start to check into your *new* Kaseya Server.

Note: If you elected to run your *existing/old* Kaseya Server while you set up the *new* Kaseya Server with a new name and IP address, then you must change all the agent accounts on the *new* Kaseya Server to use the *new* Kaseya Server name and IP address. After the *new* Kaseya Server agent accounts are properly set, change all the agent accounts on the *existing/old* Kaseya Server to use the *new* Kaseya Server name and IP address. Use the Agent > Check-in Control page in the VSA to redirect the agents to the *new* Kaseya Server and IP address. You will need to leave your *existing/old* Kaseya Server active long enough for all of your agents to check-in and be redirected to the *new* Kaseya Server.

- Update agents using the Agent > Update page.

Archiving the Kaseya Server

An archive of an installed, production Kaseya Server enables you to re-install that Kaseya Server on any other system, with no loss of data or functionality. The archive contains three elements:

- A readme file containing essential information required to perform a re-install from the archive.
- An archival folder structure, containing selected files and subfolders, that matches the folder structure used by your existing Kaseya Server.
- A SQL Server backup of your Kaseya Server `ksubscribers` database.

Note: See *Moving the Kaseya Server (page 38)* for instructions on how to re-install the archive.

Note: Ensure the archive is maintained in a secure location.

Preparing the Readme File

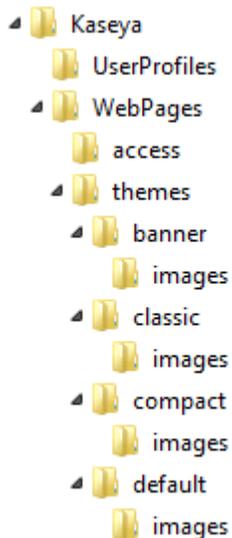
1. Log in to your current VSA server as a master administrator.
2. Add the following information to the readme file:
 - **Current address of the Kaseya server** - This field is located on the System > Configure page to the right of the label **Change external name / IP address of Server**.
 - **Current port number of the Kaseya server** - This field is located on the System > Configure page to the right of the label **Specify port Agents check into Server with**.
 - **License code of the Kaseya server** - For 4.7 and earlier this field is located on the System > Configure page to the right of the label **License Code**. For 4.8 and later this field is located on the System > **License Manager** page.

Note: You will use this same License code in your new Kaseya Server. If you have any trouble using your license code in your new Kaseya Server, then please submit a support ticket using the Kaseya Portal (<https://portal.kaseya.net>) requesting an updated license key.

- **SQL Server logon** - The system administrator logon (`sa`) and password for the SQL Server hosting your `ksubscribers` database.
- **VSA master user logon** - The VSA logon username and password of a master administrator.
- **Kaseya install directory** - The fully qualified pathname of the <Kaseya Install directory>.
- **Outbound Email Host** - The VSA outbound email host name and port.
- **Inbound Email Server** - The email server, port, and if necessary, the credential for inbound email defined in the Ticketing > Email Reader page.

Creating an Archival Folder Structure

Create an empty folder structure out of the following directories, similar to the image below. Rename the Kaseya folder shown in the image to match the name of your Kaseya Server install directory, if applicable. Copy files and folders from your existing Kaseya Server into this empty folder structure as described below. You may not need to use all the folders depicted in the image.



- <Kaseya_Installation_Directory>\UserProfiles (excluding the @backup folder) - This directory contains the files associated with your managed machines.
- <Kaseya_Installation_Directory>\WebPages\ManagedFiles (excluding VSAHiddenFiles) - This directory contains the scripts and managed files belonging to each administrator, as well as KES profiles.

Warning: Do not copy VSAHiddenFiles, found inside the WebPages\Managed files directory, from an old system to a new system. This directory contains many system helper files. Your new system install contains the latest versions of these files.

- <Kaseya_Installation_Directory>\WebPages\DataReports - This directory contains scheduled reports.

These following directories only need to be archived if customization of the VSA has created them:

- <Kaseya_Installation_Directory>\Kserver\ignoresubject.txt - This file only exists if inbound email is being filtered using the [Reject inbound emails containing the following in the subject line](#) edit box in Ticketing > Email Reader. See Kaseya KB article [306441](#) (<http://help.kaseya.com/WebHelp/KB-Article.asp?306441>) for further information.
- <Kaseya_Installation_Directory>\WebPages\themes\banner\images\new - This directory, if it exists, contains customized icons for reports and the agent when using the banner theme.
- <Kaseya_Installation_Directory>\WebPages\themes\classic\images\new - This directory, if it exists, contains customized icons for reports and the agent when using the classic theme.
- <Kaseya_Installation_Directory>\WebPages\themes\compact\images\new - This directory, if it exists, contains customized icons for reports and the agent when using the compact theme.
- <Kaseya_Installation_Directory>\WebPages\themes\default\images\new - This directory, if it exists, contains customized icons for reports and the agent when using the default theme.

- `<Kaseya_Installation_Directory>\WebPages\access` - This directory contains two files, `DefaultHeader.htm` and `LeftHeader.htm` that may be customized.

Create a SQL Server Backup of the Kaseya Server Data

1. Use SQL Server Management Studio to backup the `ksubscribers` database.
2. Copy this latest SQL Server backup to your archival folder structure. The typical location for Kaseya Server backups is:
`<Kaseya_Installation_Directory>\UserProfiles\@dbbackup`.

Note: Return to [Moving the Kaseya Server \(page 38\)](#) if you are performing this procedure.

Reporting Installer Problems

If you encounter installation issues...

For Installer Problem *Prior* to Reapply Schema

1. [Screenshot the error](#) - Edit, select all, copy, paste to Wordpad.
2. Locate in Windows the Kaseya `html` file and copy it.
3. Attach screenshot and file to the ticket.
4. Provide the system configuration: OS, DB, WEB OS.
5. If the install is broken, most of the time we cannot use the agents or other mechanisms to get to the machine. Provide RDP access for installer issues: machine name, user and password.
6. [Leave the process running at the point of error](#).

For Installer Problem *During* Reapply Schema

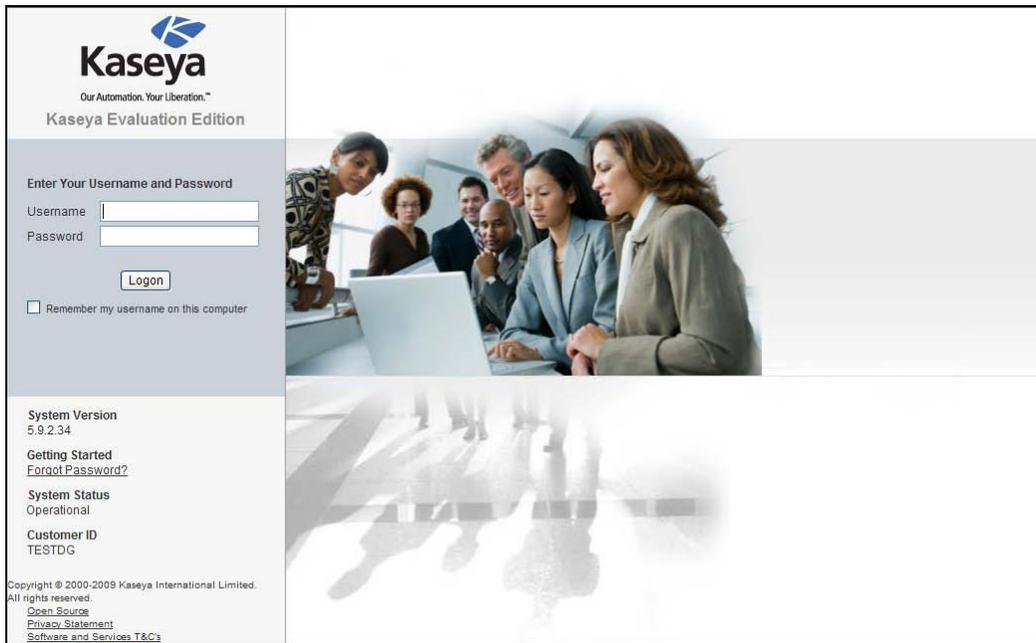
1. [Screenshot the error](#) - Edit, select all, copy, paste to Wordpad.
2. Locate the files in `<KaseyaRoot>\DBInstall\TempFiles`
3. Attach screenshot and files to the ticket.
4. Identify the Pass number where reapply encountered an error.
5. Provide the system configuration: OS, DB, WEB OS.
6. Provide remote access login information: machine name,user and password
7. [Leave the process running at the point of error](#).

Finalizing and Testing

The KServer is now completely installed and ready for service. It is advisable to perform a few functionality tests prior to full implementation.

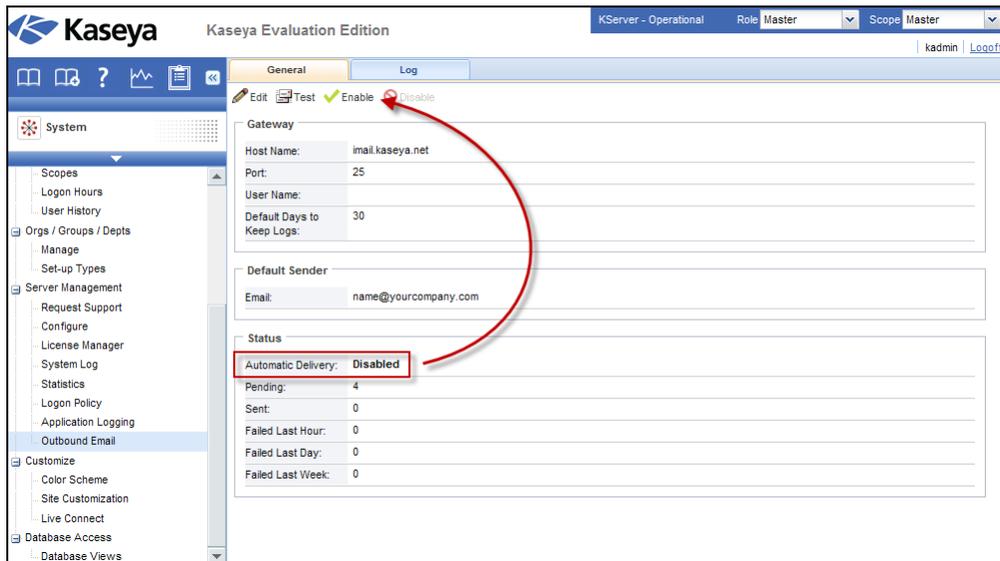
Testing Browser Access

1. Verify that the KServer can be reached from the internal and remote locations by opening a Microsoft Internet Explorer browser window and entering in `http://<YourVSAaddress>`. For difficulties accessing the server address, verify the name/IP resolution in the network Domain Name Server (DNS).
2. Logon to your new K2 VSA. You should see a logon screen similar to the following image.



Testing Outbound Email

1. Navigate to the [System > Outbound Email](#) page.
2. Send a test email by clicking the [Test](#) button and enter a valid email address.
If the test email does not arrive within 5 minutes, check the Outbound Email > [Log](#) tab.
3. You may want to test the sending of selected emails before enabling [Automatic Delivery](#). If [Automatic Delivery](#) is enabled, emails are sent as soon as they are created by the KServer. With [Automatic Delivery](#) disabled, you must click the [Log](#) tab, then select and right-click a single outbound email created by the KServer to send it.



Testing Report Generation

1. Navigate to the Info Center > [Reports](#) page. Your private user folder in the Reports page is selected when this page first displays.
2. Click the [New Report](#) button.
3. Select the Audit > [Disk Utilization](#) report template.
4. Click [Next](#).
5. Click [Save](#). The Disk Utilization report is saved in your private folder.
6. Click [Run Report](#) for the new [Disk Utilization](#) report.
7. Select any organization on the [Filters](#) tab.
8. Click [Submit](#) to run the report. The report should be generated in less than a minute.
9. If a green checkbox icon displays next to the [Once](#) value in the [Recurrence](#) column, the report was generated successfully. Report Services is correctly configured. Click the icon to see the publish report. If no agents have been deployed by your VSA, then you'll only see header and footer information in the report. This is correct. You can rerun the report after you have deployed agents and see results in the body of the page.
10. If a red exclamation point icon displays next to the [Once](#) value in the [Recurrence](#) column, there was an error generating the report. You can click the icon to see a detailed message about the error. Refer to the [Configuring SQL Server Reporting Services](#) (page 14) section of this document for guidance on how to configure Reporting Services.

Post Update Changes

- **Release Notes** - Please review the release notes to familiarize yourself with the new functionality in K2. You can display the release notes by clicking the System > **Configure** > Release Notes button.
- **Enhancements** - For users upgrading from Kaseya 2008 (v5x), the most noticeable changes in K2 are user security, organizations/machine groups, user interface design, scheduling improvements, reporting services, and **LiveConnect**.
- **Migrated Reports** - For upgrades from Kaseya 2008 (v5x) or earlier, Saved Reports, Shared Reports, and saved schedules are migrated to folders called **Migrated Reports** and **Migrated Shared Reports** in Info Center > **Reports**. After installation you may have to take ownership of the migrated shared folder to run these reports.
- **Upgrading from 4.x** - Users upgrading from 4.x will see additional changes. Below are a few key changes that 4.x users will see:
 - **Backup Locations** - Backup locations now contain the agent GUID rather than the name. See KB article [282410](http://help.kaseya.com/WebHelp/KB-Article.asp?282410) (<http://help.kaseya.com/WebHelp/KB-Article.asp?282410>).
 - **Userprofiles Directories** - \kaseya\Userprofiles directories are now listed by GUID, as above
 - To see the GUID for a machine, navigate to Agent > **Agent Status** page, then click the **Select Columns** button. Add the Agent GUID data to the displayed columns.
 - **Updating Agents** - Kaseya 2008 SP1 requires an update of the agent. To update the agent, navigate to the Agent > **Update Agent** page. Please note that you cannot downgrade the agents automatically, and once updated they will not be able to communicate with prior versions of the KServer, so ensure that the update of the KServer was successful before updating the agents. Kaseya will automatically stagger the agent updates by 1 minute, so if you have a large number of agents, this process can take some time (1000 agents = 17 hours).
 - **Log History / Archiving** - Kaseya 2008 allows unlimited retention of monitoring, SNMP and event logs. This is configurable using Agent > **Log History**. There is also an option to archive logs to a file when they age out, and if selected the system will move them to .csv files under the **Log file archive path**, which is set under System tab > Configure (C:\Kaseya\UserProfiles\@archive by default) sorted by agent GUID.
 - **Database Sizing** - Depending on how you configure log history, and how much data you are collecting, you may experience database growth after updating from Kaseya 4.8. Keep an eye of the database size, and review the settings if it starts to grow too much. If you use the archive option, ensure you have plenty of free space on whatever disk you configure the archive path.

Learning More

PDFs are available to help you quickstart your implementation of Virtual System Administrator™. They can be downloaded from the [first topic in online help](http://help.kaseya.com/WebHelp/EN/VSA/6010000/index.htm?toc.htm?6939.htm) (<http://help.kaseya.com/WebHelp/EN/VSA/6010000/index.htm?toc.htm?6939.htm>).

If you're new to Virtual System Administrator™ we recommend the following quickstart guides:

1. Getting Started
2. User Administration
3. Agent Configuration and Deployment
4. Live Connect and Portal Access
5. Monitoring Configuration

The following resources are also available.

Training

You can view VSA training videos at the [Kaseya Portal](http://portal.kaseya.net) (<http://portal.kaseya.net>). Click the *Kaseya LMS* link under the Education folder.

Conclusion

Following the instructions presented in this document enables the user to install the KServer software properly. Contact a Kaseya Support Representative for any questions regarding the installation or use of the KServer software.

Kaseya Support may be contacted using the [Kaseya Portal](https://portal.kaseya.net) (<https://portal.kaseya.net>).