



Kerika Private Server Instructions

How to prepare:

Select a machine to run the server: one that is reliably connected to the Internet.

1. You can use any Mac or Windows computer that has Java version 1.5 or later installed. If you are not sure whether your computer has the latest version of Java, visit www.java.com.
2. We recommend using an Ethernet or cable modem for your Internet connection; wireless connections are not always reliable.
3. Make sure that you don't have power saving turned on for the server computer: this could cause it to go to sleep when there is no user activity. Even desktops sometimes have power management features that could put them to sleep. A sleeping server is a useless server!

This computer could be used for other purposes during the day, so long as the user doesn't inadvertently stop the server.

Next, decide whether you need a fixed IP address or not. If your team is always working within the same local or corporate network, you don't need a fixed IP address for your private server. On the other hand, if you want the private server to be accessible from the outside your corporate network, we recommend you get a fixed IP address. Getting a fixed IP address is normally a simple matter that your Internet Service Provider (ISP) can handle.

How to install:

1. Download the Private Server software:
For Windows: <http://www.kerika.com/download/windows/StorageServiceSetup.exe>
For Macs: <http://www.kerika.com/download/mac/KerikaStorageService.dmg>
(Note: the Windows version will work just fine with Mac and Linux users, and the Mac version will work just fine with Windows and Linux users!)
2. After downloading the software, install it on your computer just like you would with any other piece of software.
3. Each Private Server is identified by a unique email address, just like every Kerika user is identified by his/her email address. When selecting an email address, please make sure it includes ".service" as part of the name, e.g. *kerika1.service@example.com*.

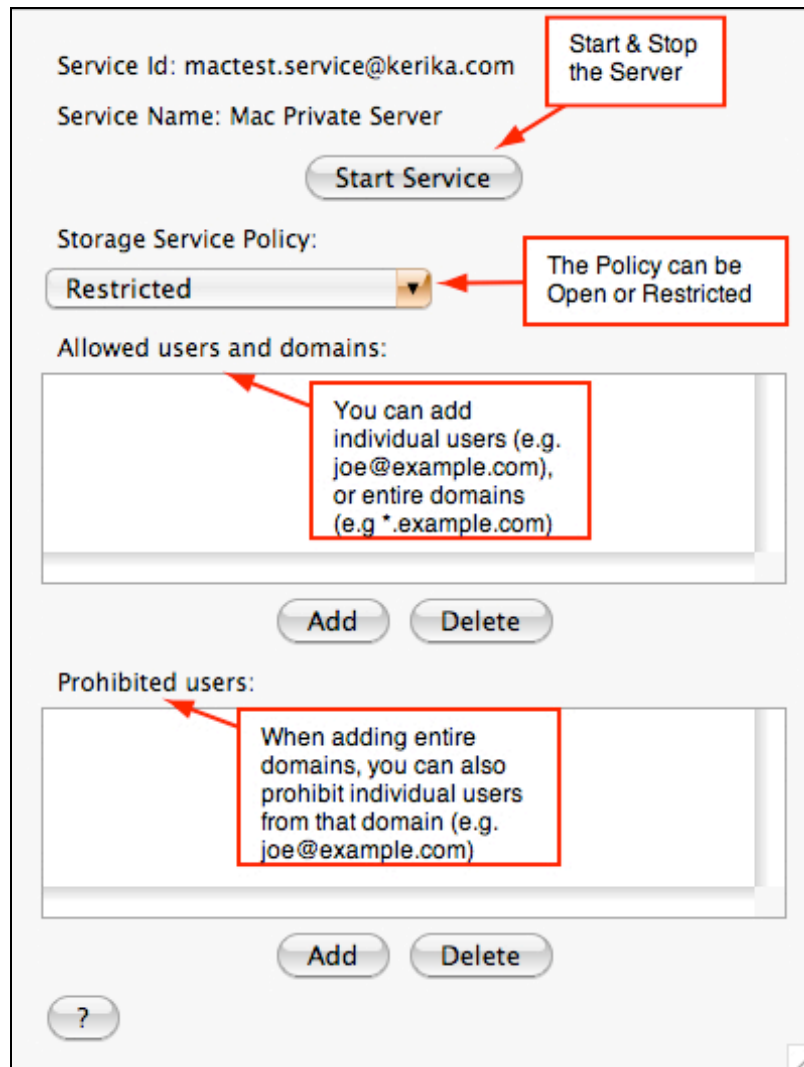
How to setup:

You need to decide whether you want your Private Server to run in *Open* or *Restricted Mode* (this is also known as your *Service Policy*).

1. In *Open* mode, any Kerika user can connect to your Private Server if they know its ID. For example, the server we run at our data centers runs in *Open* mode because it is designed to serve all our users, and your Kerika application already know its name (*storage.service@kerika.com*)



2. Most people, however, prefer to run their Private Servers in *Restricted Mode*, which lets them decide exactly who is able connect to it:
 - a. You can allow as many individual IDs as you like, e.g. *joe@example.com*; these IDs show up in the *Allowed Users* list.
 - b. You can also specify a domain if you want to serve an entire organization. For example, adding *example.com* to the list of *Allowed Users* would allow anyone with an ID that ends in *@example.com* to access your server.
 - c. If you add an entire domain, you can still prohibit individual users from within this domain from accessing the server. For example, you could prohibit just *joe@example.com* from accessing the server, while allowing everyone else with an *@example.com* ID get through.
4. Changes to the *Allowed* or *Prohibited Users* list can be made at any time; you don't need to restart the server.
5. When you have finished setting up the server, click on the *Start Service* button at the top of the Control Panel.





How to use:

Your application will expect to use the public server (*storage.service@kerika.com*) by default. Once you have set up your Private Server, you set your *User Preferences* to make sure your Kerika software uses your private server, as in this example:

The screenshot shows the 'General' tab of the 'User Preferences' dialog box. It contains several sections:

- Workspace:** A dropdown menu for 'Default shape for ideas' is set to 'Rectangle'. A checkbox 'Show pictures as images on my pages' is checked.
- Toolbar:** Four unchecked checkboxes: 'Show Refresh button', 'Show New Project button', 'Show Conversations button', and 'Show Send Documents button'.
- Reactivate all Wizards and Help Dialogs:** A button labeled 'Reactivate All'.
- Privacy:** A checked checkbox 'Use a Private Storage Server' and a text input field containing 'private.service@example.com'.
- Outgoing Email:** Two checkboxes: 'Include me on the "CC" list' (unchecked) and 'Allow me to add a comment' (checked).

A 'Close' button is located at the bottom right of the dialog box.

Note: your Kerika application will continue to check in with the public server (*storage.service@kerika.com*) even after you have set up a Private Server. This ensures that Kerika users who don't have access to your Private Server can continue to use the public server to communicate with you if necessary, while your project team uses just the Private Server for its own work.

How to change your mind:

If at any time you decide to abandon your Private Server and revert to the public server, just uncheck the box in your User Preferences.