

Liaison Software Corporation

# Liaison Messenger EDD

Installation  
Guide



**Liaison**  
Software Corporation

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# Liaison Messenger® EDD/i-PDF

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## INSTALLATION GUIDE

This document is also available on the CD in a PDF format and can also be printed on 8-1/2 x 11 paper for easier reading.

Please see the Help menu on Liaison Messenger EDD Server for the Configuration and User manuals.

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## TECHNICAL SUPPORT

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Support phone number: (714) 543-9877 x208

Support e-mail: [support@liaisonsc.com](mailto:support@liaisonsc.com)

Website: [www.liaisonsc.com](http://www.liaisonsc.com)

**Please see the Help menu on Messenger EDD Server**  
**for the Configuration and User manuals**

*"...Support Department sweet support department..."*





following chapters.

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## Q - QUICK INSTALLATION SUMMARY

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Please read the Installation Instructions chapter in its entirety before installing Liaison Messenger for the first time. This Quick Installation Summary is meant to be a guideline, not the complete step-by-step instructions that you will find in the

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### **IMPORTANT**

YOU SHOULD NOT CONFIGURE THE LIAISON MESSENGER EDD SERVER FROM ANY WORKSTATION OTHER THAN THE PC / SERVER THAT WILL BE RUNNING MESSENGER EDD SERVER.

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**For this Installation Supplement, the product names: Liaison Messenger EDD and Liaison Messenger i-PDF are interchangeable and should be considered synonymous.**

Take note that these steps may require the PC to be rebooted a couple of times until the installation is complete. This may cause interruption of logged in users if this PC is actively being used as a shared network resource.

1. Select a good, reliable, and properly functioning PC running Windows or Windows Server 2000/2008/2012, XP, Vista, or Windows 7 and use that as the Dedicated Messenger EDD Server.
2. Be prepared to establish access to any SQL Server database(s) by having all user ids and passwords available.
3. If the system uses Pervasive.SQL ensure a licensed Pervasive Client is installed and working
4. Identify, map, and test all targeted printers within the Windows Printers Folder.
5. Obtain require SMTP settings OR Install/Configure an e-mail client (i.e. Outlook/Outlook Express) with the valid POP3 and SMTP domain address and login settings. Send and verify receipt of a test e-mail before proceeding.
6. If Faxing will NOT be utilized, proceed to step 9

7. Install Faxing Software Client (if applicable) and/or Outlook Add-In if the Fax Server requires one. Contact the Faxing Software manufacturer for ALL QUESTIONS regarding their software. Liaison Software Corporation will NOT provide tech support for products other than their own software.
8. Test Faxing Software Client by sending a manual fax from a word processor before proceeding.
9. Make sure the above steps are complete before beginning the Messenger EDD Server installation.
10. Insert Liaison Messenger disc into CD drive x: and run x:\SETUP.EXE
11. Select the Messenger EDD Server Installation option.
12. Install the new version into the desired Messenger EDD location.
13. When complete allow the PC to reboot (if prompted).
14. Launch Liaison Messenger EDD Server from the Liaison Software folder, found on the Programs menu in Windows, and allow the Update Procedure to complete.
15. When finished, you will be prompted to re-start the Messenger EDD Server program.
16. Configure Messenger EDD Server by running System Configuration
17. Install the purchased Messenger EDD Clients

**Please see the Help menu  
on Liaison Messenger EDD Server  
for the Configuration and User manuals**





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## 1 - INSTALLATION SUMMARY

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**I**f you don't read anything else, read this. It is short, concise, and will get you installed as quickly as possible.

To start; the Liaison Messenger EDD application is made up of 2 components. The 1st (main) piece is called the Messenger EDD Server. Even though the name may state the word; server, this component does NOT have to be installed or run on your company's server or "a server". It does not need specialized hardware to operate, either. It is just how we refer to this component since it performs centralized processing.

The 2nd piece of Liaison Messenger is called the Messenger EDD Client. Its job is simply to allow access to the Recipient Preferences and install your licensed Liaison Messenger EDD Printer Drivers.

Liaison Messenger EDD Server and any Messenger EDD Client component will run on a standard PC running even a Windows Home version. Of course, Liaison Messenger will run on the higher-end operating systems and machines/PCs including those of 64-bit architecture.

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PLEASE NOTE, THAT SINCE MESSENGER EDD SERVER NEEDS TO INTERACT WITH VARIOUS E-MAIL CLIENTS AND FAX SYSTEMS TO ELECTRONICALLY DISTRIBUTE DOCUMENTS/FILES, IT SHOULD NOT BE INSTALLED OR CONFIGURED TO RUN AS A WINDOWS SERVICE DUE TO THE FACT THESE OTHER APPLICATIONS CAN NOT RUN AS A WINDOWS SERVICE.

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Now, since the Messenger EDD Server will be performing 95% of the printing, e-mailing, faxing, archiving, etc we recommend having the Server component run from a dedicated PC; but, it is not required. If you need to have the PC locked-down, we suggest using a Screen Saver password. Also, it is a good idea to place the Messenger EDD Server icon shortcut into the Startup folder of Windows on this machine. This way it will auto-start should the PC needed to be re-started.

To begin, please verify that your system meets the criteria listed under Supported Products; however, the Database Platforms are NOT required.

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## 1 - SUPPORTED PRODUCTS AND VERSIONS

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### DATABASE PLATFORMS

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- Microsoft SQL Server all versions
- Any ODBC Compliant Data source

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## 2 - SQL/PERVASIVE END-USER LICENSES

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Liaison Software Corporation does not provide, nor include, any runtime license, client licenses or runtime files for Pervasive.SQL/Btrieve, Microsoft SQL Server, Microsoft Outlook, etc. It is assumed since above mentioned products require the aforementioned; everyone should have the respective components and licenses needed to run any with any of the Liaison Messenger products.

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***PERFORM THE FOLLOWING PRE-INSTALLATION REQUIREMENTS BEFORE  
INSTALLING LIAISON MESSENGER FROM THE CD***

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### PRE-INSTALLATION CHECKLIST

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#### 1 - IDENTIFY AND ADD PRINTERS

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Add, connect, and print a Test Page to all printers that will be accessed via Liaison Messenger EDD Server. You must have at least 1 printer in the Printers section of the Control Panel before installing

After you've created printer references for the desired local and network printers, perform a "Print Test Page" on each printer reference and verify that you've received output.

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#### 2 - INSTALL E-MAIL CLIENTS

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In order for Liaison Messenger to e-mail documents, it requires an email client to be installed and present on the machine running Messenger EDD Server or an SMTP server/account. Liaison Messenger complies with the current MAPI and SMTP standards. Therefore, any true MAPI compliant e-mail client can be used. These clients include all versions of: Microsoft Outlook, Windows Mail, Outlook Express, Eudora, and Novell's GroupWise. Windows Mail and Outlook Express are free and comes with all versions of Windows.

One primary consideration when choosing an e-mail client is whether or not Microsoft Fax Transport will be used. Microsoft Fax Transport is the built-in faxing capabilities found in some Windows Operating Systems. The fax transport takes PDF files which are attached to Microsoft Outlook's e-mails, renders them into TIF files and faxes them to the phone number specified in the "FAX:contactname@7145430887" recipient (e-mail) address field.

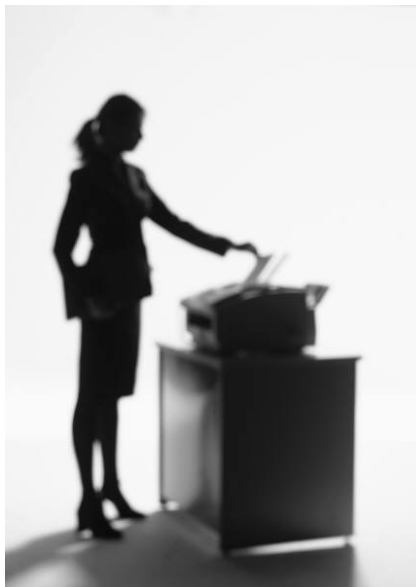
Microsoft Fax Transport requires that the e-mail client be Microsoft Outlook (only). Outlook Express is not compatible with the fax transport protocol. Also, in order for the Fax Transport engine to render the PDF files, Adobe Reader 6.0 or later must be used. The fax rendering engine does not work with Adobe Reader 7.0 or greater. Take note that we are referring only to the Adobe Reader. The full-blown Adobe Acrobat system is NOT required for Liaison Messenger as we have included

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### 3 - INSTALL FAXING SOFTWARE

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In order for Messenger to transmit forms via facsimile, an external Fax Manager is required. We currently support a number of different solutions:



Microsoft Fax Transport in conjunction with Microsoft Outlook 2000 or newer.

Any Fax Servers that support Microsoft Outlook's add-in capabilities are supported.

Internet faxing subscriptions like: efax.com and MyFax.com are excellent choices and very cost effective. Plus you do not need an extra or dedicated phone line for faxing. Not to mention no long distance or toll charges or any hardware for that matter.

Anyway, if you plan on faxing, make sure you can actually send a fax from the PC (which will be hosting Liaison Messenger EDD Server) manually by testing this first (without the document coming from Messenger). If you can successfully send a generic fax to a fax number through your email/fax client manually, it will confirm that the modem (if any), phone line and software is functional.

More often than not, our support department is contacted because the document is not faxing only to find out later a modem was not even installed or that a phone line is not active or plugged-in. Believe it or not this happens frequently.

So please test a generic document from the Fax Client first... before including Messenger EDD Server into the equation. If you can successfully fax a Word or Excel document, you can be assured that the fax client, fax server, phone line, local dialing rules, and modem (if required) is functioning properly.

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## 1 - LIAISON MESSENGER EDD/i-PDF SERVER INSTALLATION

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### 1 - INSTALL MESSENGER EDD SERVER FROM CD

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Once you have completed the above pre-requisites, you can begin installing the software from the CD or downloaded EXE (executable). Please be aware that the machine you install Messenger EDD Server onto, may need to be re-booted after the setup.exe has completed.

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YOU SHOULD BE LOGGED IN AS THE USER ID THAT YOU PLAN ON RUNNING  
MESSENGER EDD SERVER WITH. IT SHOULD HAVE SUFFICIENT RIGHTS LIKE  
THOSE OF THE WINDOWS ADMINISTRATOR

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Insert the CD and run the setup.exe file.

1. Select the **Messenger EDD Server Installation** option and proceed.
2. When prompted for the destination directory, select the default **x:\LiaisonEDD** directory on your network is recommended.
3. After the setup program finishes, you may be forced to reboot the workstation. Don't forget to remove the CD before leaving the machine.
4. Assign full access or Full Control usage rights/privileges; Read, Write, Delete, etc on the newly created Messenger folder for the users or user groups that will be using Liaison Messenger EDD.
5. We recommend assigning and mapping a common network drive letter to this folder (i.e. S:\LiaisonEDD drive folder) and use this same drive letter mapping for the Liaison Messenger EDD Clients. Yes, Liaison Messenger EDD does support UNC naming conventions; however, you will find as we begin installing the Messenger EDD Clients, a drive letter mapping will make your job much easier as well as ours in Tech Support. It's easier to say the S drive as opposed to //accountingserver/app/local/liaisonedd
6. During the Installation Process, you will be prompted and required to finish a DSN/ODBC connection. The ODBC Data Source Administrator will appear wanting you to provide and complete its creation. The default DSN name is **MESSENGEREDD**. As previously noted, you should know the respective Server Name, User ID and Password for the operating system and database server.
7. For questions on the MESSENGEREDD Data source, please see chapter 3 in this Installation Guide for detailed step-by-step assistance.

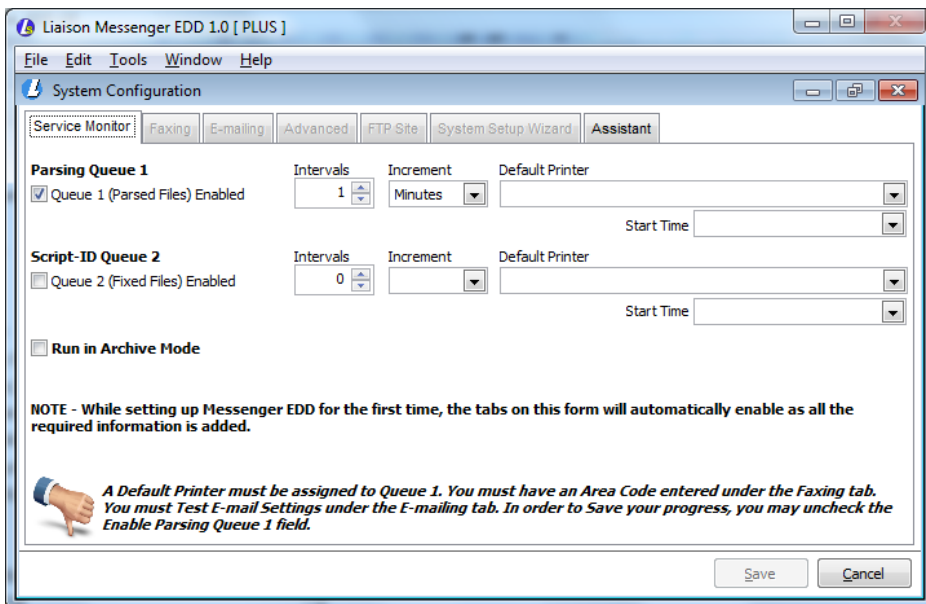
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### 2 - START MESSENGER EDD SERVER

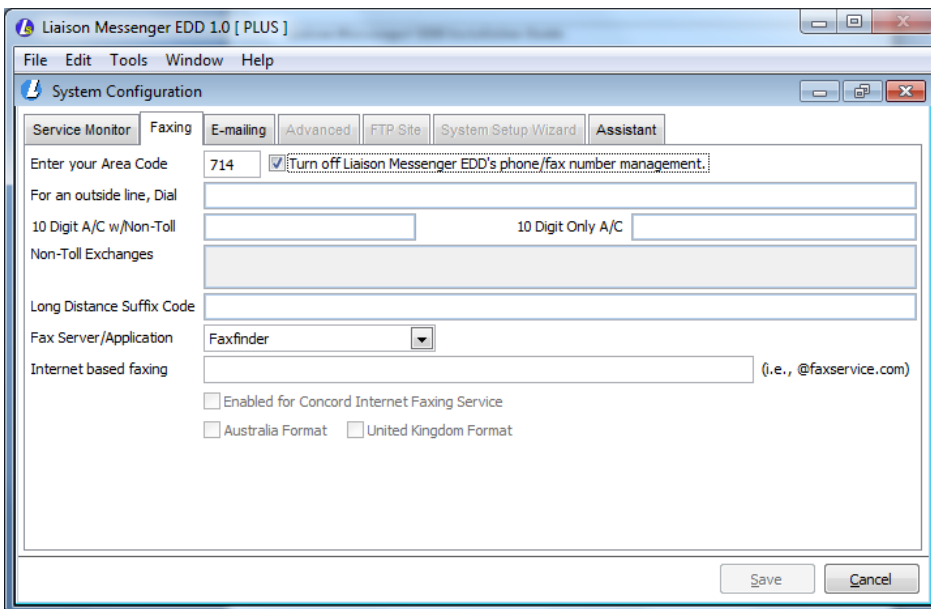
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Once you have installed Liaison Messenger from the CD allow the PC to be rebooted, if prompted. If your system does not request to be rebooted, it is because you had the required distributable runtime files already installed and a reboot was not required.

When you start EDD for the first time, you will be brought to the System Configuration window. Every tab except the Service Monitor and Assistant will be dimmed.



On the bottom of the System Configuration will be the status of your progress. Until you provide the needed information, the Save button will not be Enabled unless the Parsing Queue 1 field is unchecked. This prevents Messenger EDD from running while it is missing critical information. If you have provided everything, Messenger will be displaying a Thumbs Up and you will be allowed to enable the print queue and Save will be selectable.



The first thing it wants you to choose is a Default Printer for Queue 1.

### ENTER YOUR AREA CODE

When chosen, the Faxing tab will be enabled. Here you need to enter at least your Area Code.

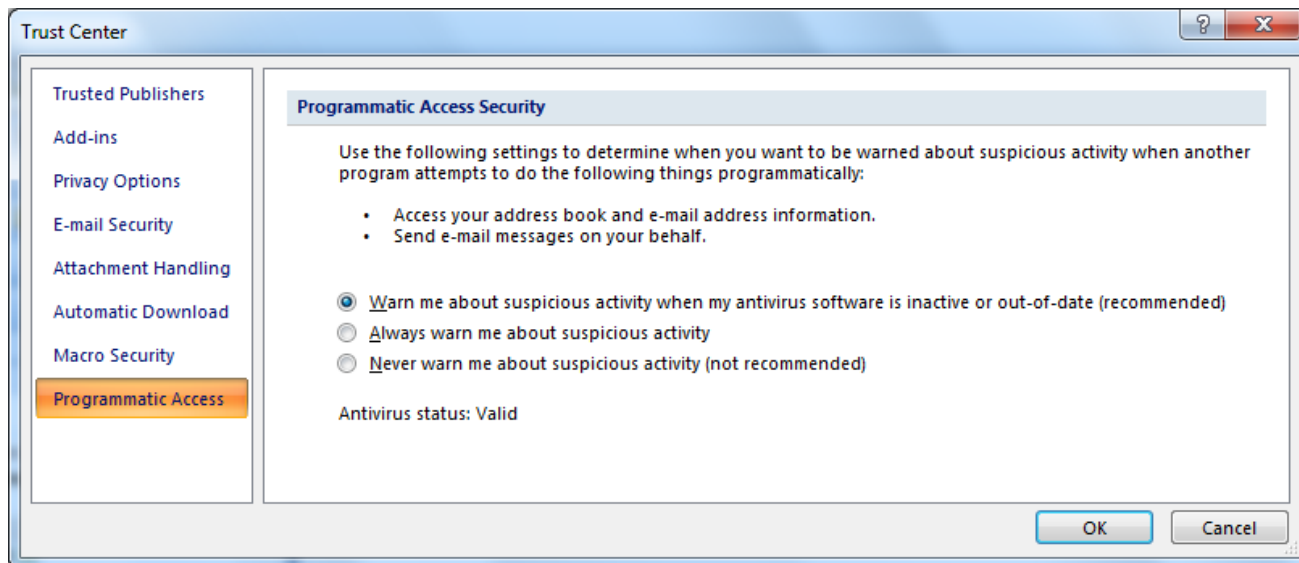
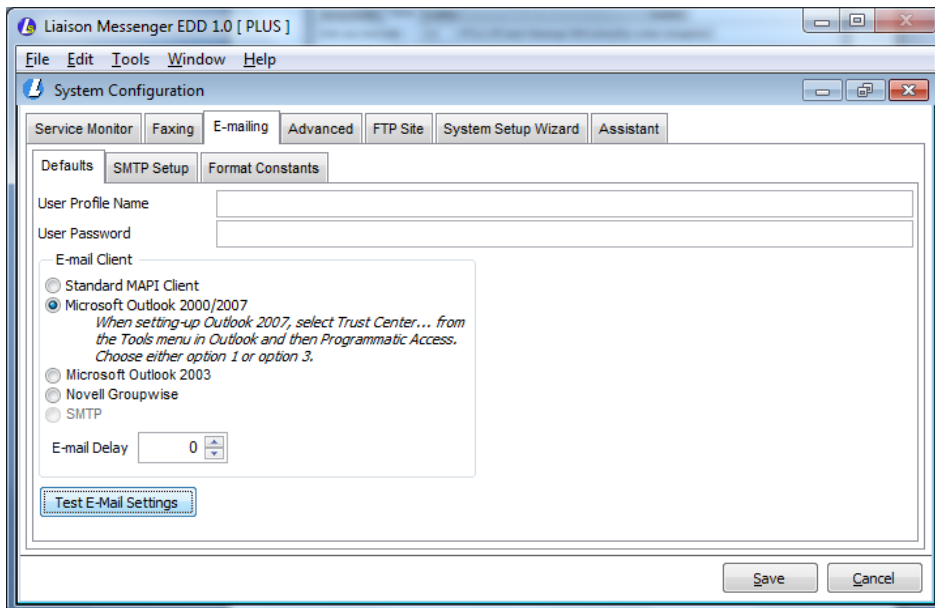
If your Fax Software is installed and functional, you may

provide the rest of the information as it applies.

IF YOU ARE USING AN E-MAIL CLIENT

Most likely all you will need to do is select “Test E-Mail Settings”.

If you are using Microsoft Outlook and you receive a message that ‘Someone is trying to send mail on your behalf’, you should select the Trust Center from the Tools menu and update Programmatic Access to an appropriate setting as illustrated in the screen shot below.



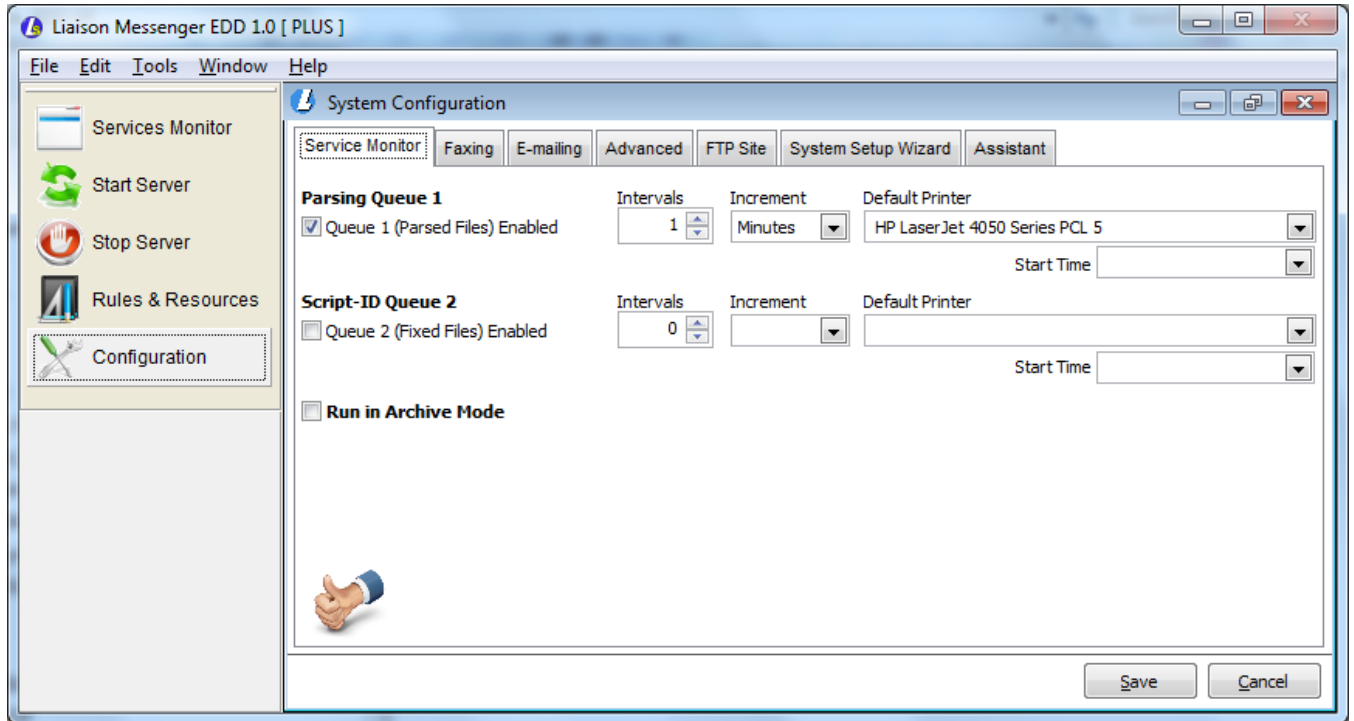
IF YOU ARE USING SMTP

Enter the required SMTP fields and select “Test E-Mail Settings”. Make sure you have all the specific information. Liaison tech support will not be able to help as these settings are unique to your SMTP environment.



**BASIC INSTALLATION IS COMPLETE**

At this time, you should have a Thumbs Up icon on the Services Monitor tab. The Advanced, FTP Site, and System Setup Wizard tabs and the Save button, should now be enabled.

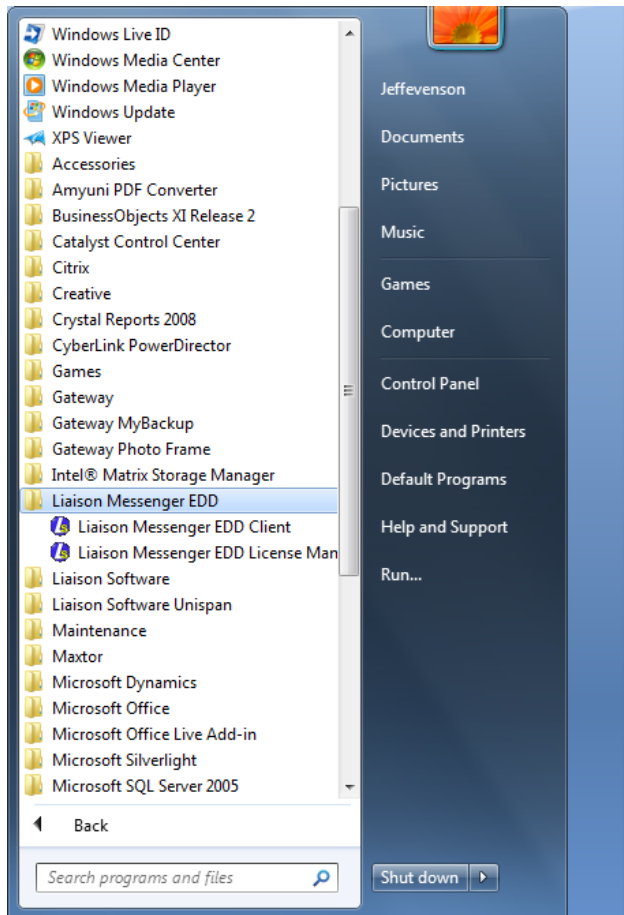


It is recommended that, you select the Save button, close Messenger EDD and proceed to install the EDD Clients as the Installation Procedure for the Messenger EDD server is now complete.

For configuration instructions, please refer to the Liaison Messenger EDD Configuration Guide. This guide is also available from the Help menu on the Messenger EDD Server.

## 2 - LIAISON MESSENGER EDD/i-PDF CLIENT INSTALLATION

Every user who will be printing through Messenger EDD/i-PDF or maintaining the preferences for internal recipients will need to have Messenger EDD Client installed. What the Liaison Messenger EDD Client setup program does is:



1. Installs the needed runtime and printer driver files if they don't already exist.
2. Creates a shortcut to the Messenger EDD Client executables on the network.
3. Creates a Liaison Software EDD folder in the Windows Start menu.

Therefore, ensuring each user has proper network rights and drive mappings already configured is required before running the Installation CD. As we discussed earlier during the Server Installation, even though Messenger fully supports UNC conventions, we still recommend assigning and mapping a common network drive letter to the Messenger folder (i.e. S:\LIAISONEDD drive folder) .

### 1 - SECURITY AND FOLDER PRIVILEGES

Each user should be granted sufficient rights to Access, Create, Edit, Delete, Search, and

Create folders in the main networked Messenger folder as well as any supporting folders that may contain BMP/JPG logo files or archived output files.

## 2 - INSTALL LIAISON MESSENGER EDD CD

Once you have configured the user's security you are ready to install the Messenger EDD Client.

1. From the x:\LiaisonEDD folder run WSSETUP.EXE.
2. OR, insert the Liaison Messenger EDD cd and run Setup.Exe and choose the **Liaison Messenger EDD Client** option,
3. When prompted for the destination directory, select the existing x:\LiaisonEDD directory on your network. Messenger EDD Client must be pointed to the main x:\LiaisonEDD as this is where the Client executables resides.

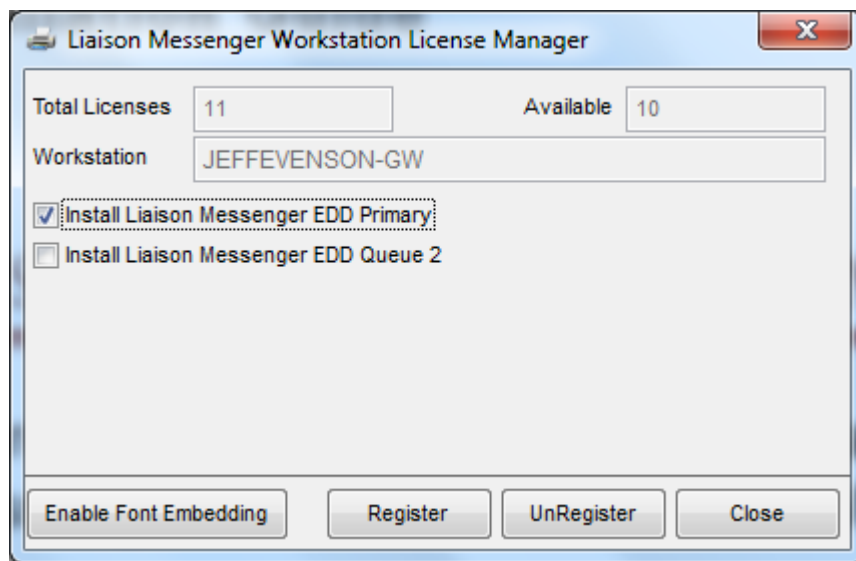
4. During the Installation Process, you will be prompted and required to finish a DSN/ODBC connection. The ODBC Data Source Administrator will appear wanting you to provide and complete its creation. The default DSN name is **MESSENGEREDD**. As previously noted, you should know the respective Server Name, User ID and Password for the operating system and database server.
5. For questions on the MESSENGEREDD Data source, please see chapter 3 in this Installation Guide for detailed step-by-step assistance.
6. Proceed to the next section called: Starting Messenger EDD Client
7. Repeat these steps for every workstation that requires Messenger EDD Client access.

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### 3 - STARTING MESSENGER EDD CLIENT

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From the new Liaison Messenger EDD folder found under the Start\Programs menu on each workstation you installed Messenger EDD Client; choose the Messenger EDD License Manager.



Check the EDD Primary checkbox. Do NOT install the Queue 2 driver unless specifically instructed by your IT department or Liaison Tech Support. It is only used in specific types of installations.

Select Register.

Depending on how many workstation licenses you purchased, your Available field will reflect the remaining licenses that have not been installed. If

you retire a PC or the user will not be printing any Messenger EDD routed forms, you can UnRegister a workstation and Register it on another workstation.

As far as client configurations, there are no configuration or setup options for Messenger EDD Client. It merely reads the defaults that were established during the Messenger EDD Server installation.

For any remaining configuration instructions for the Messenger EDD Server, please refer to the Liaison Messenger EDD Configuration Guide. This guide is also available from the Help menu on the Messenger EDD Server.

### 3 – DEFAULT DATA SOURCE: MESSENGEREDD

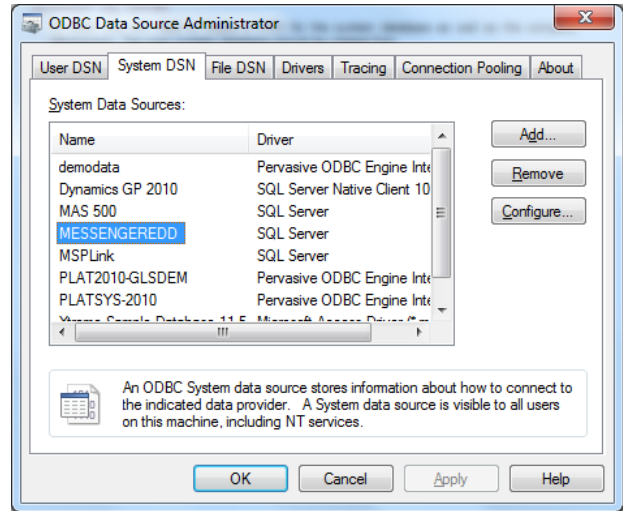
#### PERVASIVE.SQL

Starting with v9.x of Pervasive, the Client drivers could not be installed where the Pervasive.SQL Server engine was running. Therefore, Messenger EDD Server will have to reside on a separate machine from where the Pervasive.SQL Server is running.

#### MICROSOFT SQL SERVER

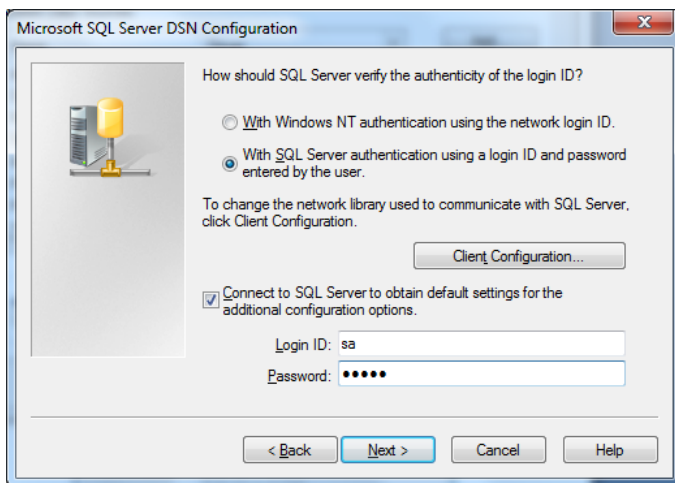
Liaison Messenger works with all version of Microsoft SQL Server through SQL 2008. Always make sure you have all the recommended service packs installed for SQL server and that all workstations are running the same version.

After you select SQL Server, choose the **Finish** button. *And no, you're really not finished... :(*



Unless you are running Sage MAS90/200, Sage PFW, or were instructed by Tech Support, we recommend using one ODBC connection called MESSENGEREDD at the Server and for each workstation. Since the Database is specified in System Configuration for the Server, we dynamically pass the database, user id, and password to the respective server on-demand.

**KEEP IN MIND, YOU WILL NEED TO USE EXACT SAME DSN NAME(S) ON EACH WORKSTATION AS THOSE ON THE EDD SERVER.**



If you do not know where the data is or what the Server's name is or what the password is (you'll need to know this next), then you will probably need to contact your IT person or Database Administrator. Now, if you've already entered a DSN name and the Server then click the Next button.

Now, it'll get a bit more technical and intimate, specify your Login method and credentials if needed and choose the **Next** button. Since user names and passwords should be unique and secret, you will have to know the needed information.

If you can proceed to this screen after choosing that Next button, you're doing good. As the DSN Configuration has then successfully validated the information you've just entered.

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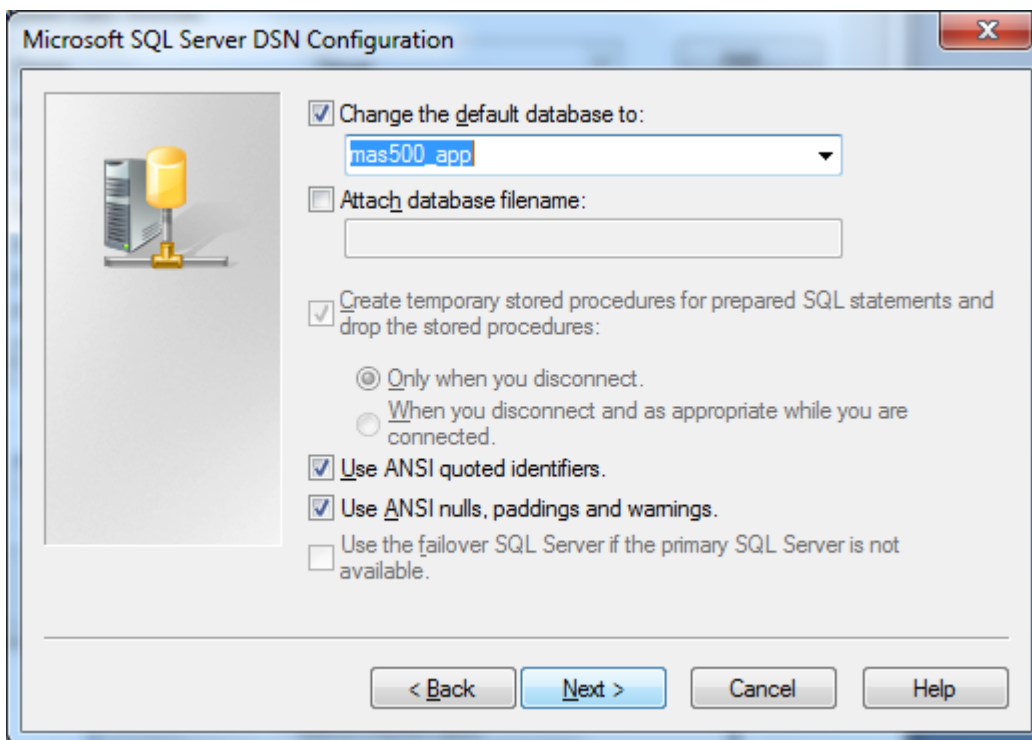
**THIS IS THE MOST IMPORTANT PART OF CREATING THE DSN FOR MESSENGER'S PURPOSE. IT ALSO GENERATES THE MOST CALLS IN TO OUR TECH SUPPORT DEPARTMENT.**

**YOU MUST SPECIFY THE "DEFAULT DATABASE" FOR EACH DSN CONNECTION.**

**IF YOU LEAVE IT UNCHECKED AND/OR SPECIFY THE INCORRECT DATABASE, YOU WILL RECEIVE ERRORS AND BECOME A TECH SUPPORT STATISTIC.**

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Again, in the provided example we are creating the DSN for the "system" database. For Dynamics GP, this is generally DYNAMICS, which is why we've selected it here. If you are creating the



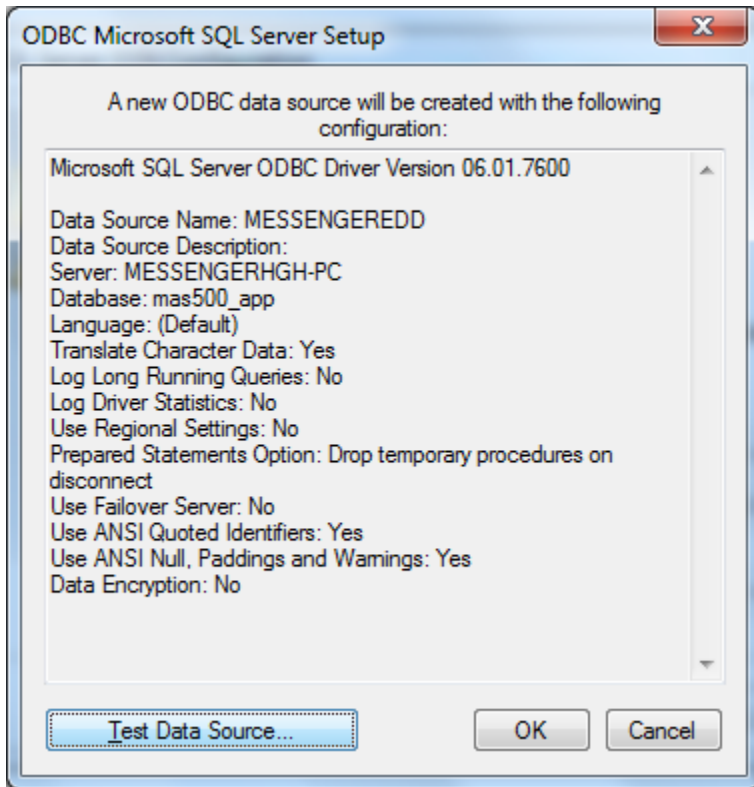
system DSN for Dynamics SL, then choose that respective database.

The rest of the settings are based upon your specific configuration, but take the defaults if you are unsure. Select the Next button and proceed to the following screen.

There are no settings on this screen that are specific to Liaison Messenger, so unless you need to change anything for your specific purpose or system requirement, accept the defaults. When done, you can select the Finish button.

The final steps in creating the DSN is the verification step that everything is A-OK.

After pressing the Finish button you will be brought to a screen where you can verify the DSN setup and you can Test the Connection.



If everything is correct you should be looking at a "TESTS COMPLETED SUCCESSFULLY" screen.

Now, you will need to create a DSN for the Database(s) that contain the individual Company Data. Repeat the exact same steps as you did creating the system database. **Remember to specify the correct "default database"** for the respective company database on these DSNs.

You may wish to do this first for the included test databases of the accounting system: (i.e., TWO for Dynamics GP; The World Online or Fabrikam) or the SLDemoApp60 test company in Dynamics SL.

One final reminder, you will need to create the **exact same name** DSN connections on each workstation that will be running Messenger EDD Client.