



IPSWITCH

## WhatsUp Gold v16.0

Installation and Configuration Guide



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## System Requirements

For WhatsUp Gold installation system requirements, as well as information about the latest product features, editions, fixed in this release, and known issues, refer to the Ipswitch WhatsUp Gold v16 *Release Notes* (<http://www.whatsupgold.com/WUG16releasenotes>).

## Installing WhatsUp Gold using WhatsUp Setup



**Note:** The *Release Notes* (<http://www.whatsupgold.com/WUG16releasenotes>) contain the most up-to-date information about installing WhatsUp Gold. Read the release notes prior to installing to be aware of any potential installation issues.



**Note:** If you are installing WhatsUp Gold on a Windows 2003 Server, you must first install IIS 6.0 on the server prior to running the installation utility. For information on how to install and configure IIS, see *Installing IIS on Windows Server 2003* (on page 17).

### Before installing WhatsUp Gold

Installing WhatsUp Gold is a simple straightforward process, however there are several decisions that you must make, and options that you should be aware of before you install WhatsUp Gold.

- You can choose to use either the bundled Microsoft SQL Server 2008 R2 Express Edition, installed by the WhatsUp Gold installation program, or an existing Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2 to store the data collected by WhatsUp Gold. See *Installing WhatsUp Gold using advanced options* (on page 5) for more information.
- You can choose to create and use a SQL Server user account other than the recommended 'sa' SQL Server account. See *Installing WhatsUp Gold* (on page 3) for more information.



**Important:** If you want to change the SQL Server user account, the account you want to use must have the same permissions as the 'sa' account. The password you create must meet any password complexity rules enforced by the local server or domain.

- You can choose to use port 80 or some other port for the WhatsUp Gold web site that is created and runs on the IIS web server. See *Installing WhatsUp Gold* (on page 3) for more information.



**Note:** It is recommended that port 80 be used for the WhatsUp Gold web site. If another port number is used, the URL for the WhatsUp Gold web site will require that port number to be appended to the hostname or IP address when forming the URL. For example if you chose 8888 as the port number instead of 80 your URL for a WhatsUp Gold install on the local host would be: localhost:8888/nmconsole.



**Note:** If port 80 is used by a current IIS web site, you must either allow WhatsUp Gold to disable that web site and take over port 80, or choose another port.

- You can choose to use a non-default database name for the WhatsUp Gold and Flow Monitor databases. See *Installing WhatsUp Gold using advanced options* (on page 5) for more information.



**Note:** The default database name for the WhatsUp Gold database is `WhatsUp`, the default name for the Flow Monitor database is `Netflow`, and the default name for the Flow Monitor Archive database is `NFArchive`.



**Note:** The Netflow Archive database will use the Flow Monitor database name with the letters 'Ar' appended to the end. If you have changed the Flow Monitor database name to `NetFlowDB`, the NetFlow Archive database will be `NetFlowDBAr`.

- You can choose to create a non-default Windows user account for WhatsUp Gold (default: `WhatsUpGold_User`). See *Installing WhatsUp Gold using advanced options* (on page 5) for more information.
- You can choose to use Windows Authentication to access an existing remote Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2. See *Using Windows Authentication for remote database access* for more information.



**Note:** The installation instructions in this document apply only to WhatsUp Gold Standard Edition and WhatsUp Gold Premium Edition. For installation instructions for WhatsUp Gold Distributed Edition or WhatsUp Gold MSP Edition, see *WhatsUp Gold Distributed Edition Deployment Guide* (<http://www.whatsupgold.com/WUG16dsdguide>) or *WhatsUp Gold MSP Edition Deployment Guide* (<http://www.whatsupgold.com/WUG16mspdg>).

## Running WhatsUp Setup

**To install WhatsUp Gold using the default Microsoft SQL Server 2008 R2 Express Edition instance:**

- 1 Log in directly to Microsoft Windows using the *Administrator* account (if you do not have an account called Administrator, use an account that has full administrative privileges to the computer).



**Caution:** We do *not* recommend using Terminal Services or Remote Desktop to install any WhatsUp product.

- 2 Start the WhatsUp Setup:
  - If you downloaded an electronic version of the WhatsUp Setup, double-click the downloaded file.
  - If you purchased a WhatsUp Setup CD-ROM, insert the CD-ROM into the appropriate drive. If it does not run automatically, click **Start**, select **Run**, then enter the CD path followed by `AutoRun.exe` (for example, `D:\AutoRun.exe`).

## Installing WhatsUp Gold using basic options



**Note:** The installation instructions in this document apply only to WhatsUp Gold Standard Edition and WhatsUp Gold Premium Edition. For installation instructions for WhatsUp Gold Distributed Edition or WhatsUp Gold MSP Edition, see *WhatsUp Gold Distributed Edition Deployment Guide* (<http://www.whatsupgold.com/WUG16dsdguide>) or *WhatsUp Gold MSP Edition Deployment Guide* (<http://www.whatsupgold.com/WUG16mspdg>).



**Note:** If you are installing WhatsUp Gold on a Windows 2003 Server, you must first install IIS 6.0 on the server prior to running the installation utility. For information on how to install and configure IIS, see *Installing IIS on Windows Server 2003* (on page 17).



**Note:** To launch the WhatsUp Gold installation program, you must run the WhatsUp Setup. For more information see *Running WhatsUp Setup* (on page 2).

### To install WhatsUp Gold:

- 1 If you are asked to install the required role services, click **Yes**. The installation program installs the required IIS components.



**Note:** When IIS is detected, but not all of the required role services are installed, you will be asked if you would like to install the IIS role services.

- 2 Read the Welcome screen and click **Next**. The License Agreement dialog appears.
- 3 Read the license agreement. If you accept the terms of the license agreement, select **I accept the terms of the license agreement**.
  - To print a copy of the license agreement, click **Print**. The license agreement is sent to the default printer.
  - If you do not accept the terms of the license agreement, click **Cancel** to exit the installation program.
- 4 Click **Next** to continue. The License Information dialog appears.
- 5 Enter your WhatsUp Gold Activation Key or select an alternative activation method.



**Note:** You must enter your Activation Key made up of the Serial Number and the Username And Password (UAP) appended to the end of your Serial Number, which combined are a total of 23 characters.



**Note:** If you are installing using the installation application downloaded from the web link provided in the purchase confirmation email, the Activation Key box will be pre-populated with your Activation Key.

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The following is an example of an activation key, which is made up of the serial number and UAP and the to be entered in **Activation Key**.

| Serial Number (15 characters) | UAP (8 characters) | Activation Key (23 characters) |
|-------------------------------|--------------------|--------------------------------|
| 01MTBDK5TN99NQ1               | XKQKC966           | 01MTBDK5TN99NQ1XKQKC966        |

- 6 Click **Next** to continue. The WhatsUp Gold Welcome screen specific to the edition you are activating appears.
- 7 Read the Welcome screen and click **Next**. The Installation Options dialog where the SQL Server is configured appears.
- 8 Select the install directories for Microsoft SQL Server 2008 R2 Express Edition. The application and data files are installed in default directories.



**Important:** Make sure that you have a large capacity drive selected for data storage. The data files for WhatsUp Gold can reach a maximum size of 22 GB.



**Important:** During installation, databases are created for WhatsUp Gold Flow Monitor. These basic databases are limited in size, but are increased the first time the Flow Monitor collector initializes. If at least 16 GB of disk space is available when the collector initializes, the maximum size of the Flow Monitor databases is increased to 4 GB each (16 GB total including transaction logs). If less than 16 GB is available, the maximum size of the Flow Monitor databases is limited proportionately to the amount of free disk space. If your license includes WhatsUp Gold Flow Monitor, we strongly recommend that you verify that you have at least 16 GB of free disk space before installing.

- 9 Click **Next** to continue. The Installation Options dialog where the 'sa' password is configured appears.



**Important:** If you want to change the SQL Server user account, the account you want to use must have the same permissions as the 'sa' account. The password you create must meet any password complexity rules enforced by the local server or domain.

- 10 Specify and confirm a **Password** for the account. You also have the option to **Keep the default password**.
- 11 Click **Next** to continue. The Installation Options dialog where the installation directory is set appears.
- 12 Select the installation directory for the WhatsUp Gold application files.

The default path is C:\Program Files\Ipswitch\WhatsUp. We recommend that you use the default path.



**Tip:** The Program Files directory path may vary if on a 64 bit system (for example, Program Files (x86)). You can install WhatsUp Gold to a different location. To select a different location, click **Change**.



**Note:** If the installation program detects data from a previous installation of WhatsUp Gold, the Backup Web and Report Files dialog appears. We recommend that you select **Back up the existing Web and report files**, then click **Next**.

- 13 Click **Next** to continue. The Installation Options dialog where the TCP port is selected appears.
- 14 Choose a TCP port for the WhatsUp Gold web site. The installation program creates an IIS web site using this port. The default port is 80.



**Note:** It is recommended that port 80 be used for the WhatsUp Gold web site. If another port number is used, the URL for the WhatsUp Gold web site will require that port number to be appended to the hostname or IP address when forming the URL. For example if you chose 8888 as the port number instead of 80 your URL for a WhatsUp Gold install on the local host would be: localhost:8888/nmconsole.



**Note:** If port 80 is used by a current IIS web site, you must either allow WhatsUp Gold to disable that web site and take over port 80, or choose another port.

- 15 Click **Next** to continue. The Installation Summary dialog appears.
- 16 Click **Proceed**. The WhatsUp Gold install program begins the installation. When the installation program completes, the InstallShield Wizard Complete dialog appears.
- 17 Click **Finish**. The setup program closes. The WhatsUp Setup will appear, and the WhatsUp Gold Web interface will appear.
- 18 Complete the installation following the instructions that appear in the web browser.

## Installing WhatsUp Gold using advanced options



**Note:** The installation instructions in this document apply only to WhatsUp Gold Standard Edition and WhatsUp Gold Premium Edition. For installation instructions for WhatsUp Gold Distributed Edition or WhatsUp Gold MSP Edition, see *WhatsUp Gold Distributed Edition Deployment Guide* (<http://www.whatsupgold.com/WUG16dsdguide>) or *WhatsUp Gold MSP Edition Deployment Guide* (<http://www.whatsupgold.com/WUG16mspdg>).



**Note:** If you are installing WhatsUp Gold on a Windows 2003 Server, you must first install IIS 6.0 on the server prior to running the installation utility. For information on how to install and configure IIS, see *Installing IIS on Windows Server 2003* (on page 17).



**Note:** To launch the WhatsUp Gold installation program, you must run the WhatsUp Setup. For more information see *Running WhatsUp Setup* (on page 2).

The WhatsUp Gold installation program provides advanced options that allow you to:

- Use an existing Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2 to store the data collected by WhatsUp Gold.
- Change the WhatsUp Gold and Flow Monitor database names.



**Note:** You can only change the default database names during the initial WhatsUp Gold installation. You cannot change the names of these databases following the initial installation.



**Note:** The default database name for the WhatsUp Gold database is `WhatsUp`, and the default name for the Flow Monitor database is `NetFlow`.

- Create a new Windows user account for WhatsUp Gold and add the user to the local administrators group.



**Note:** The Windows user created during this step will enable all applications launched from the WhatsUp Web Interface through IIS to run and make connections with the WhatsUp database using Windows authentication.

### Prerequisites for using an existing Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2

You can use an existing Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2 to store the data collected by WhatsUp Gold. To do this, you must meet the following requirements:

- Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2 English must be installed on the WhatsUp Gold host computer or another computer.



**Important:** Make sure that the "master" database for the existing SQL Server database instance that is hosting the WhatsUp database is configured to use case-insensitive collation.



**Important:** WhatsUp Gold does not support non-English versions of Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2.



**Important:** Make sure that, if WhatsUp Gold and the SQL Server is not located on the same physical machine (server), the system clocks are synchronized to the same time zone. If the system clocks are not synchronized, inaccurate data may occur in reports.

- Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2 must be configured to allow WhatsUp Gold to authenticate.
- If Microsoft SQL Server is installed on a remote computer, remote connections must be allowed. For more information, see *How to configure Microsoft SQL Server to allow remote connections* (<http://blogs.msdn.com/b/walzenbach/archive/2010/04/14/how-to-enable-remote-connections-in-sql-server-2008.aspx>).
- Use a Microsoft SQL Server user account to connect to the database.
- Microsoft SQL Server must be configured to have a user account that meets the following requirements:
- Full administrator privileges to Microsoft SQL Server, not just the WhatsUp Gold databases. WhatsUp Gold only supports accessing the database via an account with



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full administrator rights. WhatsUp Gold does not support using a limited access database user account.

- User's language is set to (United States) English. This can be set in the properties for the login used by WhatsUp Gold.

If you need assistance configuring or verifying these prerequisites, contact your database administrator or refer to the *Microsoft SQL Server documentation* (<http://support.microsoft.com/ph/2855>).

### To install WhatsUp Gold using advanced options:

- 1 If you are asked to install the required role services, click **Yes**. The installation program installs the required IIS components.



**Note:** When IIS is detected, but not all of the required role services are installed, you will be asked if you would like to install the IIS role services.

- 2 Read the Welcome screen and click **Next**. The License Agreement dialog appears.
- 3 Read the license agreement. If you accept the terms of the license agreement, select **I accept the terms of the license agreement**.
  - To print a copy of the license agreement, click **Print**. The license agreement is sent to the default printer.
  - If you do not accept the terms of the license agreement, click **Cancel** to exit the installation program.
- 4 Click **Next** to continue. The License Information dialog appears.
- 5 Enter your WhatsUp Gold Activation Key or select an alternative activation method.



**Note:** You must enter your Activation Key made up of the Serial Number and the Username And Password (UAP) appended to the end of your Serial Number, which combined are a total of 23 characters.



**Note:** If you are installing using the installation application downloaded from the web link provided in the purchase confirmation email, the Activation Key box will be pre-populated with your Activation Key.

The following is an example of an activation key, which is made up of the serial number and UAP and the to be entered in **Activation Key**.

| Serial Number (15 characters) | UAP (8 characters) | Activation Key (23 characters) |
|-------------------------------|--------------------|--------------------------------|
| 01MTBDK5TN99NQ1               | XKQKC966           | 01MTBDK5TN99NQ1XKQKC966        |

- 6 Click **Next** to continue. The WhatsUp Gold Welcome screen specific to the edition you are activating appears.
- 7 Clear **Hide advanced installation options**. This option must be cleared in order for you to use the advanced installation options.
- 8 Click **Next** to continue. The Installation Options dialog where you elect to install a new copy of Microsoft SQL Server or select an existing installation appears.
- 9 Select one of the Microsoft SQL Server Installation options.



**Note:** If you want to use an existing local or remote installation of Microsoft SQL Server 2005, or Microsoft SQL Server 2008 or 2008 R2 in support of WhatsUp Gold, select the option allowing you to choose an existing Microsoft SQL Server 2005 or Microsoft SQL Server 2008 or 2008 R2 database. You must enter the SQL Server manually as the WhatsUp Gold installer does not currently support browsing.

**10** Click **Next** to continue.

**11** If you selected to install Microsoft SQL Server 2008 R2 Express Edition on the local machine, the Enter Microsoft SQL Server 2008 R2 Express Edition Paths dialog appears. Perform the following:

- a) Select the install directories for Microsoft SQL Server 2008 R2 Express Edition. The application and data files are installed in default directories. To change the locations, click **Browse** to find and select a different directory for the application files or the data files.



**Important:** Make sure that you have a large capacity drive selected for data storage. The data files for WhatsUp Gold can reach a maximum size of 22 GB.



**Important:** During the initial installation, databases are created for WhatsUp Gold Flow Monitor. These initial databases are limited in size, but are increased the first time the Flow Monitor collector initializes. If at least 16 GB of disk space are available when the collector initializes, the maximum size of the Flow Monitor databases is increased to 4 GB each (16 GB total including transaction logs). If less than 16 GB is available, the maximum size of the Flow Monitor databases is limited proportionately to the amount of free disk space. If your license includes WhatsUp Gold Flow Monitor, we strongly recommend that you verify that you have at least 16 GB of free disk space before installing.

- b) Click **Next**. The Specify the SQL "sa" Account Password dialog appears.
- c) Specify a **User Name** for the account and enter and confirm a **Password**. You also have the option to **Keep the default password**.



**Important:** If you want to change the SQL Server user account, the account you want to use must have the same permissions as the 'sa' account. The password you create must meet any password complexity rules enforced by the local server or domain.

**12** Click **Next** to continue. The Installation Options dialog where the WhatsUp and NetFlow database names are set appears.

**13** Type any changes you want to make to the **WhatsUp database** and **Netflow database** names.



**Note:** The database names must be in English and must use alpha-numeric characters (A-Z, a-z, 0-9 and the underscore character "\_").



**Note:** You can only change the default database names during the initial WhatsUp Gold installation. You cannot change the names of these databases following the initial installation.



**Note:** The default database name for the WhatsUp Gold database is *WhatsUp*, and the default name for the Flow Monitor database is *Netflow*.



**Note:** The Netflow Archive database will use the Flow Monitor database name with the letters 'Ar' appended to the end. The default name for the Flow Monitor Archive database is *NFArchive*.

**14** Click **Next** to continue. The Installation Options dialog where you select the installation directory appears.

**15** Select the installation directory for the WhatsUp Gold application files.

The default path is `C:\Program Files\Ipswitch\WhatsUp`. We recommend that you use the default path.



**Tip:** The Program Files directory path may vary if on a 64 bit system (for example, *Program Files (x86)*). You can install WhatsUp Gold to a different location. To select a different location, click **Change**.



**Note:** If the installation program detects data from a previous installation of WhatsUp Gold, the Backup Web and Report Files dialog appears. We recommend that you select **Back up the existing Web and report files**, then click **Next**.

**16** Click **Next** to continue. The Installation Options dialog where you choose the TCP port for use by IIS appears.

**17** Choose a TCP port for the WhatsUp Gold web site. The installation program creates an IIS web site using this port. The default port is 80.



**Note:** It is recommended that port 80 be used for the WhatsUp Gold web site. If another port number is used, the URL for the WhatsUp Gold web site will require that port number to be appended to the hostname or IP address when forming the URL. For example if you chose 8888 as the port number instead of 80 your URL for a WhatsUp Gold install on the local host would be: `localhost:8888/nmconsole`.



**Note:** If port 80 is used by a current IIS web site, you must either allow WhatsUp Gold to disable that web site and take over port 80, or choose another port.

**18** Click **Next**. The Specify a Windows user account and password dialog appears.

**19** Specify a User Name for the Windows user account and enter and confirm a Password.

**20** Click **Next** to continue. The Installation Summary dialog appears.

**21** Click **Proceed**. The WhatsUp Gold install program begins the installation. When the installation program completes, the InstallShield Wizard Complete dialog appears.

**22** Click **Finish**. The setup program closes. The WhatsUp Setup will appear, and the WhatsUp Gold Web interface will appear.

# Activating WhatsUp Gold for new or upgraded licenses

If WhatsUp Gold is installed using the installation application downloaded from the Web link provided in the purchase confirmation email, the program is fully functional immediately after installation.

If the license is not automatically activated during the installation or if you are upgrading from a previous version, you can manually activate WhatsUp Gold.



**Important:** Make sure that you activate WhatsUp Gold before starting the application. If the application is not activated before the polling engine is started, the engine will not start and a message telling you that the license has expired is written to the log. The application is not functional until after it has been activated.

## To activate WhatsUp Gold manually:



**Note:** Before you start the manual activation process, make sure that you have your product Activation Key available to use in the activation program.

- 1 Click **Start > Programs > Ipswitch WhatsUp Gold > Manage WhatsUp Gold License**. The activation program appears.  
- or -  
If you run the WhatsUp Gold console at the end of the installation, it displays an Invalid License dialog. Click **Purchase/Unlock** to start the license activation process.
- 2 Follow the onscreen instructions to complete the product activation.



**Note:** When the activation is complete, a confirmation page indicates the license has been activated. If the activation does not complete successfully, you may be behind a proxy or firewall that is blocking the activation request. In this case, click **Offline**, then follow the onscreen instructions.

For more help and information about licensing, go to the *WhatsUp Customer Portal* (<http://www.whatsupgold.com/wugCustPortal>).



**Tip:** You can view information about your installation via the About WhatsUp Gold dialog, located on both the console (**Help > About WhatsUp**) and web interface (**Application Settings > About WhatsUp Gold**). The About WhatsUp Gold dialog displays your license type, serial number, product edition, registered user, maximum devices. From the About WhatsUp Gold dialog, you can view the plug-in licensing information.



**Important:** WhatsUp Gold first attempts to perform online activation over the same port (80) Internet browsers use by default. If the direct connection cannot be established, WhatsUp Gold looks for proxy settings on the computer and attempts to perform online activation through defined proxy servers. Many internet service providers use proxy servers. If no connection can be established at all, or if the product still does not succeed in connecting through a proxy server, then the user must perform offline activation through one of two methods:



1. If your browser is able to connect to the Ipswitch offline activation service on the *WhatsUp Gold Customer Portal* (<http://www.whatsupgold.com/wugCustPortal>), offline activation can be completed without moving to another computer. Offline activation instructions are provided by the product and are also available on the *WhatsUp Gold Customer Portal* (<http://www.whatsupgold.com/wugCustPortal>).



2. If your browser is unable to establish a connection to the offline activation service, offline activation can be completed using another computer connected to the Internet. Using this method, you must copy and transfer the offline activation files between the computers as directed.

## Upgrading WhatsUp Gold

WhatsUp Gold v16 supports direct upgrade installations from WhatsUp Gold v14.x or v15.x. The installation program delivers new application files and upgrades the database. The installation program automatically upgrades databases on Microsoft SQL Server Desktop Edition, Microsoft SQL Server 2008 R2 Express Edition, Microsoft SQL Server 2005, and Microsoft SQL Server 2008 or 2008 R2.



**Note:** WhatsUp Gold v12.3 or later introduces automatic database upgrades. It is no longer necessary to manually execute SQL scripts to upgrade a non-standard database.



**Note:** If you are using Microsoft SQL Server 2000, you must upgrade to Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2 prior to upgrading WhatsUp Gold. Microsoft SQL Server 2000 is no longer supported by WhatsUp Gold.

If the database is currently hosted on Microsoft SQL Server Desktop Edition or Microsoft SQL Server 2008 R2 Express Edition but you want to migrate your database to Microsoft SQL Server 2005, Microsoft SQL Server 2008 or 2008 R2, or Microsoft SQL Server Cluster 2005, 2008, or 2008 R2, complete the upgrade on the existing database, then follow the steps outlined in the *WhatsUp Gold Database Migration Guide* ([http://www.whatsupgold.com/wugdbmg\\_16](http://www.whatsupgold.com/wugdbmg_16)).

### To upgrade WhatsUp Gold:



**Note:** To launch the WhatsUp Gold installation program, you must run WhatsUp Setup. For more information see *Running WhatsUp Setup* (on page 2).

- 1 On the WhatsUp Setup Install Options dialog, select the WhatsUp Gold version you want to which you want to upgrade. The status will show a message detailing the version being upgraded.
- 2 If you are asked to install the required role services, click **Yes**. The installation program installs the required IIS components.



**Note:** When IIS is detected, but not all of the required role services are installed, you will be asked if you would like to install the IIS role services.



**Note:** You will need to install IIS if you are upgrading from a WhatsUp Gold installation that uses the WhatsUp Gold web server, as it is no longer supported, or if you are installing on Windows Server 2003 (you must install IIS6 for Windows Server 2003). When installing on operating systems that support IIS7, the installation program will automatically install IIS7 if it is not installed.

- 3 The Welcome dialog appears. It provides the WhatsUp Gold version to which the setup program will upgrade the installed WhatsUp Gold system.



Read the Welcome screen and click **Next**.

- 4 Click **Next**. The License Agreement dialog appears.
- 5 Read the license agreement. If you accept the terms of the license agreement, select **I accept the terms of the license agreement**.
  - To print a copy of the license agreement, click **Print**. The license agreement is sent to the default printer.
  - If you do not accept the terms of the license agreement, click **Cancel** to exit the installation program.

Click **Next**. The Back Up Existing Database dialog appears.

- 6 Since the installation program makes changes to the WhatsUp Gold database, we strongly recommend that you select **Yes, back up the existing database**.

Click **Next**. The Back Up Web and Report Files dialog appears.

- 7 If you have modified any of the Web or Report files, select **Back up the existing Web and report files**. If this option is selected, the existing Web and report files are copied to a backup folder before the upgrade begins. We recommend that you select this option.

Click **Next**. The Choose Port dialog appears.

- 8 Choose a TCP port for the WhatsUp Gold web site. The installation program creates an IIS web site using this port. The default port is 80.



**Note:** It is recommended that port 80 be used for the WhatsUp Gold web site. If another port number is used, the URL for the WhatsUp Gold web site will require that port number to be appended to the hostname or IP address when forming the URL. For example if you chose 8888 as the port number instead of 80 your URL for a WhatsUp Gold install on the local host would be: localhost:8888/nmconsole.



**Note:** If port 80 is used by a current IIS web site, you must either allow WhatsUp Gold to disable that web site and take over port 80, or choose another port.



**Note:** If you selected to use port 80 on the Choose Port dialog and port 80 is in use by an existing web site, a message will appear that asks if you want the WhatsUp Gold installation program to take over port 80 for use by the 'WhatsUp Gold web site. If you want the WhatsUp Gold installation program to take over port 80, click **Yes**. Otherwise, click **No**. The dialog closes and the Choose Port dialog appears.

Click **Next**. The Ready to Install the Program dialog appears.

- 9 Click **Install**. The installation program upgrades the necessary components.
- 10 Click **Finish**.

### Updating user accounts after upgrade

When upgrading from WhatsUp Gold v14.x or earlier to WhatsUp Gold v15.0 or later, user accounts that had been granted the Manage User user right may not have access to portions of the web interface, such as the Admin Panel on the Admin tab. It may appear as if these user accounts have all of the available user rights, however the user account does not actually have any of the new user rights released in the WhatsUp Gold v15.0 or later releases, and the account will need to be updated before the user rights actually assigned to the user account are displayed properly.

#### To update a user account following upgrade:

- 1 Navigate to the Manage Users dialog (**Admin > Manage Users**)
- 2 Select the user account you want to update, then click **Edit**. The Edit User Account dialog appears.
- 3 Without making any changes, click **OK**. The user account is updated
- 4 Log out of the WhatsUp Gold web interface, then log back in to the WhatsUp Gold web interface.
- 5 Verify that the user account displays the user rights actually assigned to the account.

## Repairing WhatsUp Gold



**Note:** To launch the WhatsUp Gold installation program, you must run WhatsUp Setup. For more information see *Running WhatsUp Setup* (on page 2).

#### To repair WhatsUp Gold:

- 1 On the WhatsUp Setup Install Options dialog, select the WhatsUp Gold version you want to which you want to repair. Continue with WhatsUp Setup using instructions provided

in *Running WhatsUp Setup* (on page 2). The Welcome dialog of the WhatsUp installation program will appear.

- 2 Select **Repair** to reinstall all program features installed by the previous setup.



**Tip:** Select **Remove** to uninstall WhatsUp Gold.

Click **Next**. The Back Up Existing Database dialog appears.

- 3 Since the installation program makes changes to the WhatsUp Gold database, we strongly recommend that you select **Yes, back up the existing database**.

Click **Next**. The Back Up Web and Report Files dialog appears.

- 4 If you have modified any of the Web or Report files, select **Back up the existing Web and report files**. If this option is selected, the existing Web and report files are copied to a backup folder before the upgrade begins. We recommend that you select this option.

Click **Next**. The Setup Type dialog appears.

- 5 Select **Repair IIS configuration** to repair the current IIS configuration.



**Tip:** Select **Don't change current IIS configuration**, if you do not want to change the current IIS configuration.

Click **Next**. The Ready to Install the Program dialog appears.

- 6 Click **Finish**.

## Uninstalling WhatsUp Gold

### To uninstall WhatsUp Gold:

- 1 Launch the install program from the WhatsUp Setup:
  - a) Run the WhatsUp Setup. For more information, see *Running WhatsUp Setup* (on page 2). On the Install Options dialog, select the WhatsUp Gold product option, then click **Next**.



**Note:** The WhatsUp Setup program detects any currently installed Ipswitch WhatsUp branded software and determines which installation options are available (**New Installation**, **Upgrade**, **Repair** or **Un-install**). This information is displayed to the right of the product name and version.

- b) On the License Information dialog, select **Use existing installed license**, then click **Next**.
- c) On the Installation Summary dialog, ensure that the currently installed version of WhatsUp Gold is displayed as the product selected for repair or uninstall, then click **Next**. The Welcome dialog of the Whatsup Gold Installation program will appear.
- d) Select **Remove** to uninstall WhatsUp Gold.





**Tip:** Select **Repair** to reinstall all program features installed by the previous setup.

- e) Click **Next**.
- OR -
- 2 Launch the install program from the Programs and Features dialog:
  - a) Navigate to the Control Panel dialog (**Start > Control Panel**).
  - b) Click **Uninstall a Program**. The Uninstall or change a program dialog will appear and populate with all of the installed programs.
  - c) Select the version of **Ipswitch WhatsUp Gold** you want to uninstall.
  - d) Click **Uninstall**. The Whatsup Gold installation program will appear.
- 3 Select one of the following options:
  - If you want to remove WhatsUp Gold but maintain your configuration data, select **Keep my configuration data, but uninstall Ipswitch WhatsUp Gold v15**. The configuration data includes device definitions, custom monitors, users, recurring reports and historical poll data.
  - If you want to remove your configuration data and uninstall Ipswitch WhatsUp Gold v15, select **Remove my configuration data and uninstall Ipswitch WhatsUp Gold v15**.
  - If you selected **Remove my Configuration data and uninstall Ipswitch WhatsUp Gold v15** and you want to remove the WhatsUp SQL Server Express Edition instance created during the install, select **Also, remove the WhatsUp instance of SQL Server Express**.



**Caution:** Selecting **Remove my Configuration data and uninstall Ipswitch WhatsUp Gold v15** will delete the WhatsUp Gold database. If you remove the configuration data, it cannot be recovered. However, if you maintain your configuration data, you can reinstall WhatsUp Gold and restore the saved configuration. If you remove the WhatsUp instance of SQL Server Express, any other database created on the instance will be lost.

A confirmation screen will appear.

- 1 Click **Yes** to remove WhatsUp Gold. The Setup Status dialog appears.

The setup status dialog shows the status of the uninstall. When the uninstall is complete, the Uninstall Complete dialog appears.
- 2 Select **Yes, I want to restart my computer now**.

Click **Finish**. The Uninstall Complete dialog closes and your computer will shutdown and restart.

## About device count limits

WhatsUp Gold is licensed by the number of monitored devices. After the number of monitored devices has been reached, you cannot add new devices to WhatsUp Gold.

**To view the number of devices your license allows and the number of devices you have currently configured:**



- 1 From the console, select **Help > About WhatsUp**. The About WhatsUp dialog appears.  
- or -  
From the web interface, select **Help > About WhatsUp**. The About WhatsUp dialog appears.
- 2 **Maximum Devices** indicates the number of devices your license allows you to monitor. The total number of devices currently configured in WhatsUp Gold is indicated in the first paragraph.



**Tip:** You can upgrade your license to include more devices through the *WhatsUp Customer Portal* (<http://www.whatsupgold.com/wugCustPortal>).

## About the Task Tray and Desktop Actions applications

WhatsUp Gold installs two task bar icons on your computer.

- The Task Tray icon  alerts you to the status of the application as a whole.
- The Desktop Actions icon  displays to indicate that the application for Sound and Text-to-Speech actions is turned on.



**Note:** Desktop Actions must be running for the Sound and Text-to-Speech actions to work.

### WhatsUp Gold Icons

During normal operation, the Task Tray icon displays the worst state of all devices on your map.



**Tip:** You can enable tooltips to have the icon display any state change that occurs on the system. To do this, right-click on the icon and select or clear **Enable Tooltips**.





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When the WhatsUp Gold service is stopped and the polling engine is not running, this icon appears:



In this case, you need to restart the WhatsUp Polling Engine service. If the polling engine is not running, WhatsUp Gold is not connected to the database, and nothing in the application functions properly.

- To turn off the Task Tray Application and icon , right-click on the icon, then click **Close Task Tray Application**.
- To turn off the Desktop Actions icon , right-click the icon, then click select **Close**.



**Note:** Sound and Text-to-Speech actions are disabled when you close the Desktop Actions icon.

## Installing IIS on Windows Server 2003

Use the following procedure to enable the required IIS Web Extension and install IIS if it has not been installed.

The required Web Extension is Active Server Pages (ASP).



**Note:** You will need to provide your Windows Server 2003 Enterprise x64 Edition CD-ROM to copy files necessary to install IIS.

### To install IIS and the required Web Extensions on Windows Server 2003:

- 1 Install Internet Information Services (IIS).
  - a) Navigate to the Programs and Features dialog (**Start > Settings > Control Panel > Add or Remove Programs**). The Add or Remove Programs dialog appears.
  - b) From the pane on the left side of the window, select **Add/Remove Windows Components**. The Windows Components Wizard appears.
  - c) Select **Application Server**.



**Note:** You will need to provide your Windows Server 2003 Enterprise x64 Edition CD-ROM to copy files necessary to install IIS.

- d) Click **Next**. Setup installs IIS.
- 2 Allow Active Server Pages as a Web Service Extension.
    - a) Navigate to the Internet Information Services (IIS) Manager. (**Start > Settings > Control Panel > Administrative Tools > Internet Information Services (IIS) Manager**). The Internet Information Services Manager appears.

- b) Select **Web Service Extensions** in the left pane. The Web Services Extensions dialog appears in the right pane.
  - c) Select **Active Server Pages**, and click **Allow**. The Active Server Pages extension is allowed.
- 3 Close the IIS Manager. You can now run the WhatsUp Gold installation program.

# Using Windows Authentication for remote database access

## Prerequisites

Before you begin, you must have access to the following:

- Remote Microsoft SQL Server server
- Computer on which to install WhatsUp Gold



**Note:** The computer on which you are going to install WhatsUp Gold must be on the same domain as the Microsoft SQL Server server.

- Domain user account (called user1 in this example)

For details regarding minimum hardware and software requirements, see System Requirements.

## Overview

To configure a WhatsUp Gold installation to use Windows Authentication for remote Microsoft SQL Server database access:

- 1 Add the domain user to the Local Administrator group on the machine that will host WhatsUp Gold.
- 2 Add the domain user to the Local Administrator group on the machine that is hosting Microsoft SQL Server.
- 3 Add the domain user (e.g. user1) to the Microsoft SQL Server database using the Login dialog.
- 4 Assign the same permissions that are assigned to the Microsoft SQL Server 'sa' user to the Domain User (user1) in the Microsoft SQL Server database.
- 5 Install WhatsUp Gold with a local Microsoft SQL Server 2008 R2 Express Edition database.
- 6 Run the Database Configuration utility and configure the WhatsUp Gold database connection to connect to the remote database using Windows Authentication.
- 7 Configure the ODBC driver to connect to the remote database using Windows Authentication.
- 8 Configure IIS to use the Domain User for the NMConsole application pool and change the anonymous access user account to the Domain User for the WhatsUp Gold web site.
- 9 Configure the Ipswitch Services Control Manager to use the Domain User to run the WhatsUp Gold processes.

## Creating and adding the domain user to the WhatsUp Gold and Microsoft SQL Server host machines

**To add the domain user to the Local Administrators group on the machine that will host WhatsUp Gold:**

- 1 Log in to Windows as a local administrator on the machine that will host WhatsUp Gold.
- 2 Create the domain user, or otherwise determine which domain user (e.g. user1) you want WhatsUp Gold to connect to the remote Microsoft SQL Server database.

Use the following steps to create a domain user:

- a) Open Microsoft Management Console by clicking the Start button , typing mmc into the Search box, and then pressing ENTER. If you are prompted for an administrator password or confirmation, type the password or provide confirmation.
  - b) In the left pane of Microsoft Management Console, click **Local Users and Groups**.
  - c) Click the **Users** folder.
  - d) Click **Action**, and then click **New User**.
  - e) Type the appropriate information in the dialog box, and then click **Create**.
  - f) When you are finished creating user accounts, click **Close**.
- 3 Add the selected domain user (e.g. user1) to the Local Administrator group.
    - a) In the left pane of Microsoft Management Console, click **Local Users and Groups**.
    - b) Double-click the **Groups** folder.
    - c) Right-click the Local Administrator group, and then click **Add to Group**.
    - d) Click **Add**, and then type the name of the user account.
    - e) Click **Check Names**, and then click **OK**.
  - 4 Restart the computer (optional, but recommended).

**To add the domain user to the Local Administrators group on the machine that is hosting the Microsoft SQL Server database:**

- 1 Log in to Windows as a local administrator on the machine that is hosting the Microsoft SQL Server database.



**Note:** The MSSQL server must be on the same domain as the WhatsUp Gold server.

- 2 Add the selected domain user (e.g. user1) to the Local Administrator group.
  - a) In the left pane of Microsoft Management Console, click **Local Users and Groups**.
  - b) Double-click the **Groups** folder.
  - c) Right-click the Local Administrator group, and then click **Add to Group**.
  - d) Click **Add**, and then type the name of the user account.
  - e) Click **Check Names**, and then click **OK**.
- 3 Restart the computer (optional, but recommended).

## Adding the domain user as a Microsoft SQL Server database user

To create a SQL Server login that uses Windows Authentication (SQL Server Management Studio)

- 1 Launch the SQL Server Management Studio.
- 2 Add the domain user:
  - a) In SQL Server Management Studio, open Object Explorer and expand the folder of the server instance in which to create the new login.
  - b) Right-click the Security folder, select **New**, and then click **Login**.
  - c) On the General page, enter the domain user name (e.g. user1) in **Login name**.
  - d) Select **Windows Authentication**.
  - e) Click **OK**.
- 3 Provide the domain user (e.g. user1) with the same permissions as the Microsoft SQL Server system administrator (sa) user. The following is a guideline that provides the most common settings for the 'sa' user.
  - On the **Server Roles** page, select the `sysadmin` role.
  - On the User Mapping page - Select the `db_owner` role membership for each database. If you do not wish the domain user to have access to a specific database, do not provide `db_owner` (`dbo`) role membership for that database.
  - On the Status page in the Settings menu:
    - Select **Grant** for **Permission to connect to database engine**.
    - Select **Enabled** for **Login**.
- 4 Save your changes and exit SQL Server Management Studio.

## Installing WhatsUp Gold and configuring the connection to the remote database

To configure WhatsUp Gold and connect to the remote database:

- 1 Log in to the machine that you using the domain user (e.g. user1) on the WhatsUp Gold server.
- 2 Install WhatsUp Gold. Use all of the default settings, allowing the Microsoft SQL Server 2008 R2 Express Edition database to install locally.



**Note:** Because of service dependencies, you must allow the local database to install and run. It is possible remove this dependency later.

- 3 After the WhatsUp Gold installation completes, run **RemoteDBConfig.exe**, using Windows authentication, and point it at the remote database server. (**Start > Programs > Ipswitch WhatsUp Gold v15 > Utilities > Database Configuration Utility**)
  - a) Locate the `RemoteDBConfig.exe` file in the default location: `C:\Program Files (x86)\Ipswitch\WhatsUp`, or in the custom location where you installed WhatsUp Gold.
  - b) Double-click the `RemoteDBConfig.exe` file. The Database Connection dialog appears.

- c) Check to make sure the Server Name is correct for the location of your local SQL server for WhatsUp Gold.
- d) Browse for the remote SQL server you want to use.
- e) In the Authentication section, select **Windows Authentication**.



**Note:** You must be logged in as the domain user (e.g. user1).

- f) Click **Connect**.
- g) Click **Continue** to update the databases.
- h) Click **Finish** to exit.



**Note:** If you see BCP errors, delete the WhatsUp and NetFlow databases on the remote SQL server and try running `RemoteDBConfig.exe` again.

### Set up the ODBC connection on the machine hosting WhatsUp Gold

- 1 Set up the ODBC connection to use Windows Authentication and the remote SQL database server.
  - a) On 32-bit systems, click **Start > Settings > Control Panel**, then double-click the 32bit ODBC icon.  
- or -  
On 64-bit systems, locate the C:\Windows\SysWOW64 folder, and double-click the ODBCAD32.exe icon.
  - b) Select the **System DSN** tab.
  - c) Select **NetFlow**.
  - d) Click **Configure**.
  - e) Select the remote SQL server from the **Server** list.
  - f) Click **Next**.
  - g) Select **With Windows NT authentication using the network login ID**.
  - h) Continue clicking Next, accepting the current settings. Save the changes and exit.
  - i) Repeat steps b through g for all other sources.

### Configure WhatsUp Gold to use Windows Authentication

- 1 Run `NmConfig.exe` to configure WhatsUp Gold to use Windows authentication:
  - a) Click **Start > Programs > Ipswitch WhatsUp Gold v15.0 > Utilities > Database Configuration Utility**.
  - b) Select **Use Windows Authentication**.
  - c) Click **Connect**.
  - d) Ensure **Restart the WhatsUp services after the update** is selected.
  - e) Click **Save**.

## Configure IIS on the machine hosting WhatsUp Gold

For operating systems that use IIS6, you must add the domain user account to the IIS\_WPG group and change the identity for the NmConsole application pool to the domain user, and configure the account used for anonymous authentication to the domain user (e.g. user1). For operating systems using IIS7, you only need to change the identity for the NmConsole application pool, and configure the account used for anonymous authentication. The following procedures provide information on performing these tasks.

### To add the domain user account (e.g. user1) to the IIS\_WPG group on IIS6

- 1 On the desktop, right-click **My Computer**, and then click **Manage**.
- 2 In the Computer Management screen, under **System Tools**, expand **Local Users and Groups**, and then click **Groups**.
- 3 Right-click the **IIS\_WPG** group, and then click **Add to Group**.
- 4 In the **IIS\_WPG Properties** dialog box, click **Add**.
- 5 In the **Select User, Computers, or Groups** dialog box, in the **Enter the object names to select** box, type the account name on which you want your worker process to run (e.g. <Web domain>\user1), and then click **OK**.
- 6 In the IIS\_WPG Properties dialog box, click **OK**.
- 7 Close the Computer Management screen.

### To change the identity for the NmConsole application pool on IIS6

- 1 To change the account under which an application pool runs using IIS Manager
- 2 In IIS Manager, expand the local computer, expand **Application Pools**, right-click the NmConsole application pool, and then click **Properties**.
- 3 Click the **Identity** tab, and click **Configurable**. Configurable refers to registered user names.
- 4 In the **User name** and **Password** boxes, type the user name and password of the domain account (e.g. user1).
- 5 Click **OK**.

### To change the identity for the NmConsole application pool on IIS7

- 1 Open IIS Manager. (**Control Panel** > **System and Security** > **Administrative Tools** > **Internet Information Services (IIS) Manager**)
- 2 In the Connections pane, expand the server node and click **Application Pools**. The Application Pools list populates.
- 3 On the Application Pools page, select the **NmConsole** application pool, and then click **Advanced Settings** in the Actions pane. The Advanced Settings dialog appears.
- 4 Select the Identity property under the Process Model heading, and then click the ... browse button. The Application Pool Identity dialog appears.
- 5 Select **Custom account** and click **Set**. The Set Credentials dialog appears.
- 6 Type the domain account name in the User name box (e.g. user1)
- 7 Type and confirm the password for the domain account (e.g. user1) in the Password text box
- 8 Click **OK**. The Set Credentials dialog closes.
- 9 Click **OK**. The Application Pool Identity dialog closes.
- 10 Click **OK**. The Advanced Settings dialog closes.
- 11 Exit the IIS Manager application.



### To configure the account used for Anonymous authentication on IIS 6.0:

- 1 In IIS Manager, expand the local computer, right-click the **WhatsUpGold** website, and then click **Properties**. The WhatsUpGold Properties dialog appears.
- 2 Click the **Directory Security** tab.
- 3 In the Authentication and access control section, click **Edit**. The Authentication Methods dialog appears.
- 4 Select the **Enable anonymous access** check box.
- 5 Type the valid Windows user account you want to use for Anonymous access, or click **Browse** to locate it.
- 6 Click **OK**. The Authentication Methods dialog closes.
- 7 Click **OK**. The WhatsUpGold Properties dialog closes.
- 8 Exit the IIS Manager application.

### To configure the account used for Anonymous authentication on IIS 7.0:

- 1 Open IIS Manager (**Control Panel > System and Security > Administrative Tools > Internet Information Services (IIS) Manager**).
- 2 Click the **Features View** tab, double-click **Authentication**. The Authentication page appears.
- 3 On the Authentication page, select **Anonymous Authentication**.
- 4 In the Actions pane, click **Edit**. The Edit Anonymous Authentication Credentials dialog appears.
- 5 Select Specific user, then click **Set**. The Set Credentials dialog appears.
- 6 Type a user name and password for the identity.
- 7 Click **OK**. The Set Credentials dialog closes.



**Important:** If you use the Network Service account, you grant anonymous users all the internal network access associated with that account.

- 8 Click **OK** to close the Edit Anonymous Authentication Credentials dialog box.
- 9 Exit the IIS Manager application.

## Configure the Ipswitch Service Control Manager service to run under the domain user

### To configure services on the WhatsUp Gold server:

- 1 Log in to the WhatsUp Gold server as user1.
- 2 Click **Start** and type `services.msc`. Press **Enter**. The Services dialog appears.
- 3 Locate **Ipswitch Service Control Manager** in the Name column and right-click it.
- 4 Select **Properties** from the list. The Properties dialog for the service appears.
- 5 Click the **Log On** tab.
- 6 Select **This account**.
- 7 Type or browse for user1. Enter and confirm the password for the user1 account.
- 8 Click **OK**.

## Finding more information and updates

Following are information resources for WhatsUp Gold. This information may be periodically updated and available on the *WhatsUp Gold web site* (<http://www.whatsupgold.com/support/index.aspx>).

- **Release Notes.** The release notes provide an overview of changes, known issues, and bug fixes for the current release. The notes also contain instructions for installing, upgrading, and configuring WhatsUp Gold. The release notes are available at **Start > Programs > Ipswitch WhatsUp Gold > Release Notes** or on the *WhatsUp Gold web site* (<http://www.whatsupgold.com/WUG16releasenotes>).
- **Application Help for the console and web interface.** The console and web help contain dialog assistance, general configuration information, and how-to's that explain how to use the features. The Table of Contents is organized by functional area, and can be accessed from the main menu or by clicking **Help** in the console, or the **?** icon in the web interface.
- **Getting Started Guide.** This guide provides an overview of WhatsUp Gold, information to help you get started using the application, the system requirements, and information about installing and upgrading. The Getting Started Guide is available on the *WhatsUp Gold web site* (<http://www.whatsupgold.com/wug16gsg>).
- **WhatsUp Community.** WUGspace is an WhatsUp Gold IT community centered around valuable technical content for network engineers, IT managers, Architects, and System Administrators. Visit the community for additional product information and help, learn from other users, submit product ideas, and more. Visit the WhatsUp Gold forum on the *WUGspace community site* (<http://www.whatsupgold.com/wugspace>).
- **Additional WhatsUp Gold resources.** For a list of current and previous guides and help available for WhatsUp Gold products, see the *WhatsUp Gold web site* (<http://www.whatsupgold.com/support/guides.aspx>).
- **Licensing Information.** Licensing and support information is available on the *WhatsUp Customer Portal* (<http://www.whatsupgold.com/wugCustPortal>). The web portal provides enhanced web-based capabilities to view and manage Ipswitch product licenses.
- **Technical Support.** Use the WhatsUp Gold Support Site for a variety of WhatsUp Gold product help resources. From here you can view product documentation, search Knowledge Base articles, access the community site for help from other users, and get other Technical Support information. The Support Site is available on the *WhatsUp Gold web site* (<http://www.whatsupgold.com/support/index.aspx>).

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