Installing SharePoint Reminder on a Farm with Multiple Web Front End (WFE) servers.

For other scenarios (e.g. single server installation, farm with only one WFE) then consult the online manual.

http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual

Specifically the section concerned with Installation

http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=installation%2Fintroduction.htm

Note *- This guide only repeats information already found in the online manual.*

Preparation

- The Reminder service should only be installed on **ONE** of your Web Front End (WFE) servers – the web part itself will be installed automatically on all.

  Note *– The software will still need to be licensed to run on all the WFE servers that are serving content to users (e.g. are behind a NLB). You don't need to count database, index, search, admin or application servers.*

- Identify which WFE will be the **Main WFE** that the Reminder service is installed upon and record

Main WFE Name		**Non** Load balanced IP address		Load Balanced IP address	

- The Reminder service will need to run under an account with sufficient security privileges.

  One will have already been setup for the **SharePoint Timer** service to run under. The easiest approach is to re-use this account. Start services.msc – find the **SharePoint Timer** service, right click Properties and note the account in the Log On tab for later.

  Otherwise you can create domain account specifically for Reminder to use. Consult this page for more information http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=reminderservice%2Fdomain-account-wssv3.htm

Reminder service will use this account		Password	

- Download the appropriate version of the Reminder software (e.g. SharePoint 2007 64 bit or SharePoint 2010)

http://www.pentalogic.net/sharepoint-products/reminder/reminder-download-file

Installation

Log onto the Main WFE server with an account that has local and SharePoint administrative permissions.

Run the installer downloaded earlier – leaving all settings at the default unless advised to do otherwise.

***Note** – As with installing any 3rd party web part this will cause an IISRESET and make your WFE server unresponsive for ~ 30 seconds so you may want to do during a maintenance window.*

Configuring Remoting

For a farm with multiple WFE server several additional configuration steps are necessary. This page of the manual gives more information on these steps but you can just follow the steps below.

http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=reminderservice%2Fwebfarminstallation.htm

- Start the **Configuration Tool** from Program Files > Pentalogic > SharePoint Reminder > Configuration Tool.
- Click on **Server Settings**
- Leave the **Authentication** settings as **Automatic** - the vast majority of SharePoint installation use Integrated authentication and so should be left as Automatic.
- On **Remoting Settings** change to **Manual** and port # **1063**
- Click on the **Licensing** tab and record the **Installation Code** (using Copy and Paste to ensure its copied correctly!) – you will need this later to get a License Key.

Installation Code	

- Click on **OK** to save changes
- Start **RegEdit**
- Find the Key **HKEY_LOCAL_MACHINE\SOFTWARE\Pentalogic\SharePointReminder\1\IpcURL**
- Right click on the key and select **Export** and save somewhere safe.
- Open the .reg file you just saved in Notepad.
- Ensure that the URL listed in the .reg file uses the **NON load balanced IP** address of the **Main WFE** server and the port number **1063** – edit if necessary and save.
- Install this key on all other WFE servers in this farm by logging onto them and double clicking on the .reg file.

Set the service Log On as account

- Start **services.msc** on the main WFE
- Find the **SharePoint Reminder Service**, right click and select **Properties**

- Click the **Log On** tab and enter the account recorded above (usually the account the SharePoint Timer service is running)
- Start the service

Testing

Once the service has been setup you can run a diagnostics program to verify common problems.

- Start the **Configuration Tool** from Program Files > Pentalogic > SharePoint Reminder > Configuration Tool.
- Click on **Run Diagnostics**
- Follow the diagnostics tool, answering questions such as "Are the URLs found correct"
- At the end of the process it will **send test emails** to the address you enter – ensure they come through correctly.
- If any errors are found the Diagnostics tool will list possible reasons and links to pages to troubleshoot.
- If you can't resolve the problem please save the results of the file and send this to support@pentalogic.net with a description of your farm configuration and what you've tried.

The vast majority of problems are caused by one of

1. Incorrect Alternate Access Mappings (AAM)

Reminder uses the **Default** AAM from SharePoint. If you use the URL http://sharepoint.company.com (for example) but Reminder lists the URL http://someservername-xxa01 (for example) then your AAM are not setup correctly in SharePoint Central Administration.

2. Local Loopback Check

If the diagnostics tool shows it's getting a 401 Unauthorized exception then its likely due to the Local Loopback Check problem.

You can verify this by starting IE on your server (NOT on your workstation) and browsing to your site. If you get repeated authentication prompts followed by 401 Unauthorized error then this local loopback check has not been configured. See this page for more details :-

http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=troubleshooting%2F401errors%2F401errors.htm

This page of the manual gives further information on the diagnostics tool

http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=configurationtool%2Fdiagnostics.htm

Adding a Reminder Web Part

Once you've passed the **Diagnostics Tool** you're ready to create the first Reminder web part.

This page shows some common scenarios or usages. It's a good idea to read through some of these to get an idea of how Reminder works and what it can do.

http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=commonscenarios%2Fintroduction.htm

This page examines all the configuration options of the web part.

http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=webpart%2Fintroduction.htm

Tips

- We recommend that you put Reminder web parts on their own web part or wiki page. They don't have to be on the same page as the List you're 'watching' and once setup you will likely not have to use the web parts again so it's better to keep them 'out of the way'

- The Email Redirect feature is very useful when experimenting with the web parts to ensure that only you get sent emails.

  http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=webpart%2Fconfig_redirectemails.htm

- You can include fields from the list in the email Subject or Message (e.g. mail merge) by using the syntax [Field Name]

  http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=faq%2Fhowcani%2Fhowcani.htm

- You can use Views to ensure that Reminder only sends out emails for the list items you want – e.g. you wouldn't want to send 'your task is overdue' for tasks already completed or you may only want to send out emails for High Priority tasks.

  http://www.pentalogic.net/sharepoint-products/reminder/reminder-manual?p=faq%2Fhowcani%2Fhowcani.htm