

# CardioLog Setup Guide

## Enterprise, Professional, Standard

**Version: 2.0.3.0**

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## Contents

<b>1. Contacting Intlock.....</b>	<b>3</b>
<b>2. Introduction .....</b>	<b>4</b>
<b>3. System Requirements .....</b>	<b>5</b>
<b>4. CardioLog Architecture .....</b>	<b>7</b>
<b>5. Installed Components .....</b>	<b>9</b>
<b>6. Required Permissions.....</b>	<b>9</b>
<b>7. CardioLog Installation Procedure .....</b>	<b>10</b>
7.1 Running the Installation Wizard .....	10
7.2 Starting the CardioLog Diagnostics Service .....	12
<b>8. Product Activation.....</b>	<b>13</b>
<b>9. Configuring Usage Tracking and Reporting.....</b>	<b>17</b>
<b>10. CardioLog Uninstall Procedure .....</b>	<b>28</b>
10.1 Running the Uninstall Wizard .....	28
<b>11. CardioLog Upgrade Procedure.....</b>	<b>28</b>
11.1 Running the Uninstall Wizard .....	28
11.2 Running the Install Wizard .....	28
11.3 Upgrading a Remote SharePoint Agent .....	29
<b>12. CardioLog Repair Procedure .....</b>	<b>31</b>
12.1 Running the Uninstall Wizard .....	31
12.2 Running the Install Wizard .....	31

## 1. Contacting Intlock

Web site: <http://www.intlock.com/intlocksite/contactUs.asp>

### Contacting Intlock Support

Intlock Support is available to customers who have installed the CardioLog evaluation version or who have purchased a commercial version and have a valid maintenance contract. Intlock Support provides help with the ongoing configuration and maintenance, including periodic upgrades and service packs.

View the [CardioLog User Guide](#) for a detailed description of the product.

Web site: <http://www.intlock.com/intlocksite/Support/Request-Support.asp>

## 2. Introduction

CardioLog is an integrative solution which offers monitoring and reporting for enterprise portals of various technologies such as Microsoft SharePoint 2010, Microsoft SharePoint 2007 and Microsoft Dynamics CRM.

Unlike other web analytic tools, CardioLog offers statistical aggregations based on the logical structure of the monitored environment and also aggregations based on a physical structure (URL address).

Working directly with a tree that represents the logical structure of the organization enables users to view accurate data according to the familiar organization structure (as opposed to according to the URL addresses of the various applications in the organization, which do not necessarily illustrate the hierarchal relationship between the applications).

CardioLog fully supports the Microsoft SharePoint object models and hierarchies, including the various portal objects (such as Wikis, Blogs, Sites, Documents, etc.) Moreover, CardioLog supports any custom portal hierarchy, which can be defined either manually or through an API for environments which are not shipped with the product.

CardioLog ships with full support for integration with multiple Active Directories and offers data filtering by users and groups in the organization.

In addition, CardioLog offers:

- Monitoring of portal events such as – views, updates, and searches – in various time intervals and for any object in the organization’s hierarchal tree.
- Generation of queries about portal usage and the ability to display them as tables, charts or meters (gauges) – and a way to distribute them throughout the organization in various ways, such as: web interface, Email, and SharePoint Web Parts.

CardioLog is designed for IT managers and content managers. The product’s working environment includes an easy-to-operate user interface and an administration interface.

### 3. System Requirements

To ensure optimal operation, it is recommended to install the CardioLog application and database on dedicated servers\*\*\*.

Make sure that your system meets the following minimum hardware and software requirements:

	<b>Professional Edition</b>	<b>Enterprise Edition</b>
<b>Platform</b>	64-bit	64-bit
<b>Operating System</b>	Windows 2003/2008 Server or Windows 2003 R2/2008 R2 Server Standard Edition (fully patched)	Windows 2003/2008 Server or Windows 2003 R2/2008 R2 Server Standard Edition (fully patched)
<b>Application Memory*</b>	8GB	Minimum** - 16GB Recommended - 32GB
<b>Processors*</b>	2xQUAD	Minimum** - 2xQUAD Recommended - 4xQUAD
<b>SQL Edition</b>	Microsoft SQL Server 2005/2008 Standard Edition (fully patched)	Minimum** - Microsoft SQL Server 2005/2008 Standard Edition (fully patched)  Recommended - Microsoft SQL Server 2005/2008 Enterprise Edition (fully patched)
<b>SQL Memory</b>	4GB	Minimum 16GB
<b>SQL Processors</b>	2xQUAD	Minimum** - 2xQUAD Recommended - 4xQUAD
<b>SQL Storage</b>		
<b>System Disk</b>	10 GB	10 GB
<b>Page File Disk</b>	10 GB	10 GB
<b>Database Disk</b>	~150 GB (depending on the monitored environment)	~150 GB (depending on the monitored environment)
<b>Transaction Log Disk</b>	According to the backup policy	According to the backup policy
<b>RAID</b>	Raid 5/10 or similar	Raid 5/10 or similar

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**Additional Software & Services**

- Microsoft .NET Framework 3.5 Service Pack 1
  - Microsoft Chart Controls for Microsoft .NET Framework 3.5
  - IIS 6.0, IIS 7.0 or IIS 7.5
  - Microsoft Internet Explorer 7.0 or higher
  - Microsoft .NET Framework 3.5 Service Pack 1
  - Microsoft Chart Controls for Microsoft .NET Framework 3.5
  - IIS 6.0, IIS 7.0 or IIS 7.5
  - Microsoft Internet Explorer 7.0 or higher
- 

\* This refers to hardware allocated for the CardioLog application pool and services (and not for the CardioLog SQL server)

\*\* For up to 2,000,000 page views per month

\*\*\* The CardioLog application and database servers can be installed on virtual machines (which meet the above minimum hardware and software requirements)

For more information, see the [CardioLog System Requirements](#) guide.

## 4. CardioLog Architecture

The CardioLog solution includes the following separate components:

<b>UI</b>	A web application for configuring and viewing the web analytic reports. Hosted on the CardioLog application server.
<b>Database</b>	A repository for storing all tracking and reporting data. Hosted on the SQL server.
<b>Portal Tree Service</b>	A web service that provides the structure of the monitored environment. CardioLog includes several off-the-shelf portal tree services, such as the SharePoint Tree Service.
<b>Tracking Agent</b>	A JavaScript tag that is included in the portal pages and monitors site usage. CardioLog includes several off-the-shelf tracking agents, such as the SharePoint Agent.
<b>Event Collector</b>	A web service which sends tracking data from the tracking agent to the main CardioLog database.
<b>CardioLog Scheduling Service</b>	A Windows services which runs scheduled jobs, such as event processing.
<b>CardioLog Diagnostics Service</b>	A Windows service which runs the health checks for the system.
<b>Offsite Application</b>	A web application which sends tracking data from tracking agents located in DMZ - to the Offsite database.

---

**Offsite Database**

A repository of tracking data in DMZ.

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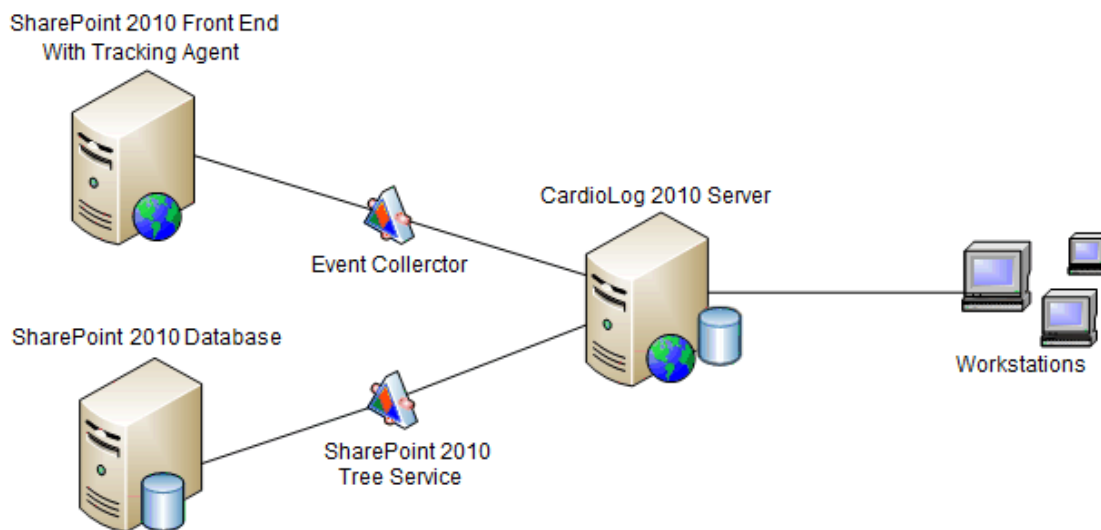
**User Categories Service**

A web service which provides additional visitor data from SharePoint user profiles, AD attributes or other custom sources.

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**Sample Configuration**

This is a basic CardioLog configuration for SharePoint within an intranet environment:



For performance reasons, it is recommended to separate CardioLog from the monitored environment and install it on a designated server.

## 5. Installed Components

The CardioLog installer installs the following components:

1. CardioLog database - installed on a selected SQL Server 2005/2008 instance.
2. **CardioLog Scheduling Service** Windows service.
3. **CardioLog Diagnostics Service** Windows service.
4. HKEY\_LOCAL\_MACHINE\SOFTWARE\Intlock\CardioLog registry key
5. Installation files.
6. CardioLog IIS application pool (CardioLogApplicationPool).
7. CardioLog IIS web site. The default port number is 29999 - unless used by another application.
8. Start menu shortcut to CardioLog.

## 6. Required Permissions

The account which runs the setup must be a member of assigned the following roles:

- Local Administrator
- SQL: create database, alter any login permissions, processadmin role and view server state on the SQL Server instance that will host the CardioLog database.

## 7. CardioLog Installation Procedure

### 7.1 Running the Installation Wizard

1. Open CardioLog-2011-XXX-2.0.XXX.XXX.exe
2. For Windows Server 2008, if a User Account Control message appears, select **Allow**.
3. Go through the Installation Wizard steps.
4. In the **CardioLog Service Account** dialog, select an existing user account that will be used for the CardioLog web application pool and the CardioLog Windows services.

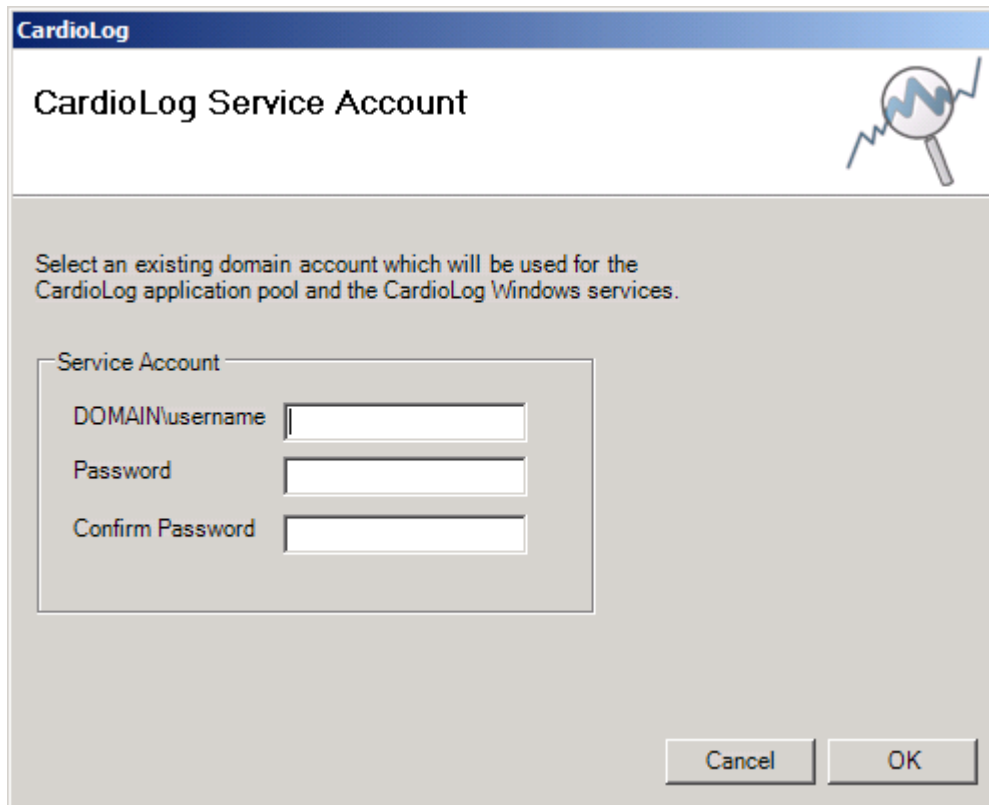
**Note:** If the SQL server is remote, select a configurable Windows domain account.

**Note:** The service user account must have read permissions to the SharePoint template directory:

[SharePoint 2010 Server]\%PROGRAMFILES%\Common Files\Microsoft Shared\web server extensions\14\TEMPLATE

[SharePoint 2007 Server]\%PROGRAMFILES%\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE

5. The selected user account will be added to the IIS\_WPG local group (only in IIS 6.0), assigned a 'db\_owner' role for the CardioLog database and assigned a 'processadmin' server role.



**CardioLog**

### CardioLog Service Account

Select an existing domain account which will be used for the CardioLog application pool and the CardioLog Windows services.

Service Account

DOMAIN\username

Password

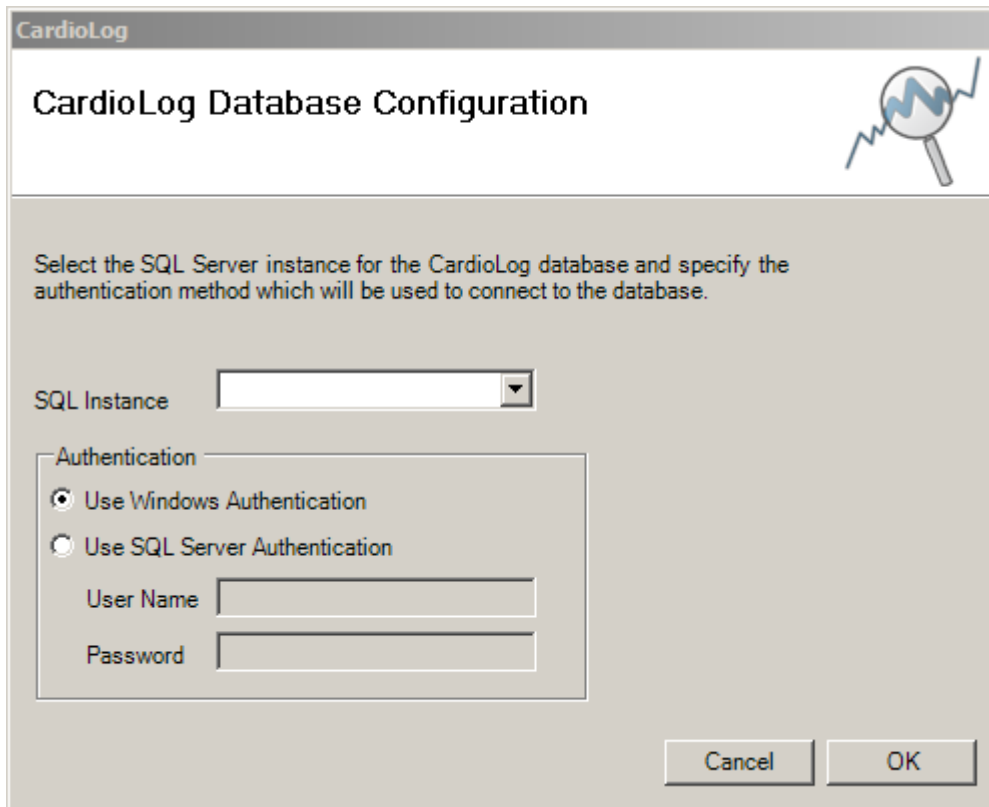
Confirm Password

Cancel OK

6. In the **CardioLog Database Configuration** dialog, select a SQL Server 2005/2008 instance for the CardioLog database and specify the authentication method that will be used to connect to the database.

**Note:** If you choose to host the CardioLog database on a remote SQL Server, make sure that the setup account has 'create database' and 'alter any login' permissions, and is assigned a 'processadmin' role on the remote SQL Server.

If you select Windows Authentication, confirm that the CardioLog service account has read permissions for all SharePoint configuration and content databases.



CardioLog

### CardioLog Database Configuration

Select the SQL Server instance for the CardioLog database and specify the authentication method which will be used to connect to the database.

SQL Instance

Authentication

Use Windows Authentication

Use SQL Server Authentication

User Name

Password

Cancel OK

## 7.2 Starting the CardioLog Diagnostics Service

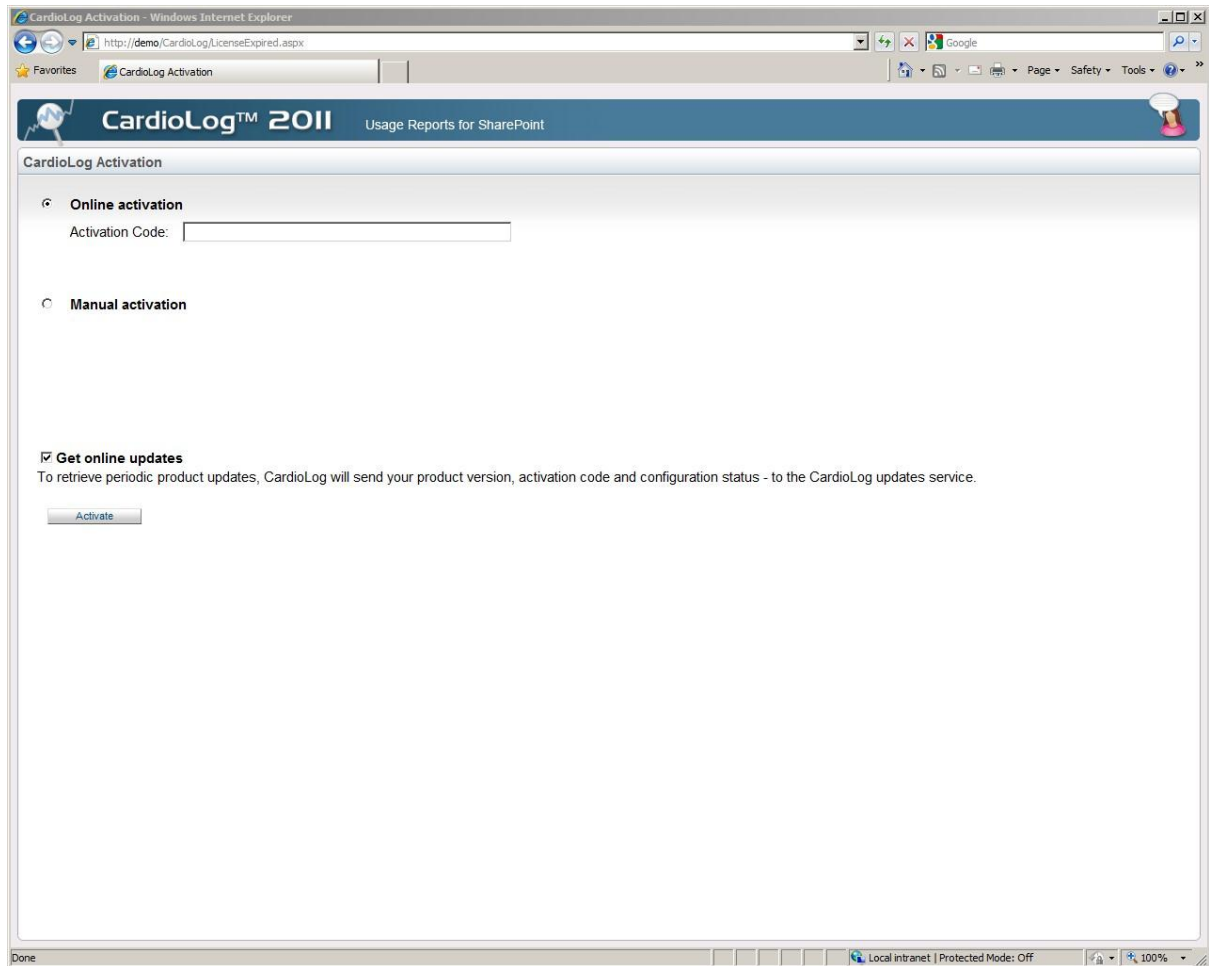
1. Click on **Start > Run > services.msc**
2. Open **CardioLog Diagnostics Service**
3. In the **CardioLog Diagnostics Service** properties window, click **Start** and then **OK**.

## 8. Product Activation

Upon launching CardioLog, you will be redirected to the CardioLog Activation page.

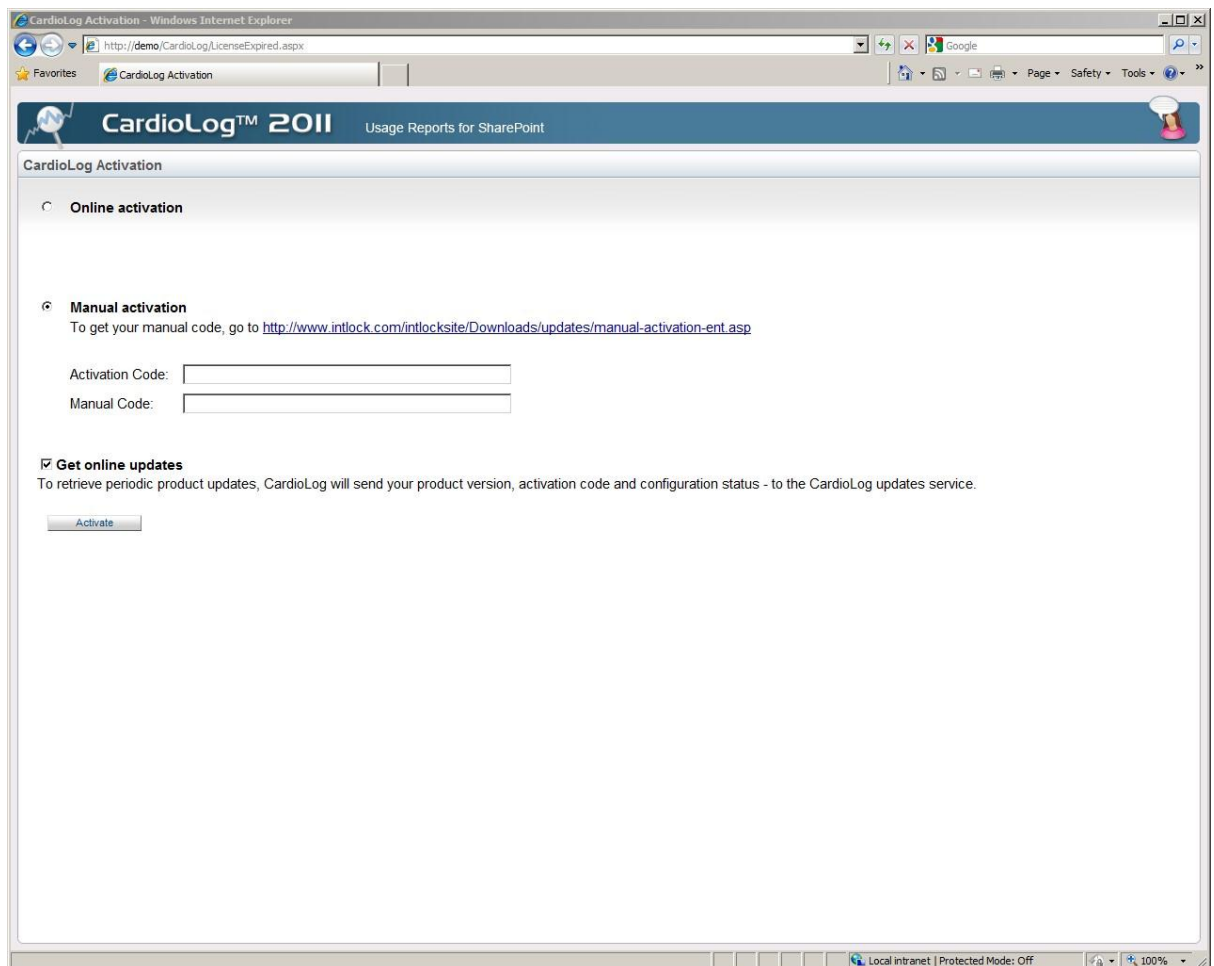
1. Click **Start > All Programs > CardioLog > CardioLog**
2. In the **CardioLog Activation** page, you will be provided with 2 options for activation: **online** or **manual**.

2.1. **Online Activation:** enter the activation code that you received by email. Then click **Activate**.



## 2.2. Manual Activation:

- 2.2.1. Click the provided link. An internet connection is required – this step may be performed from any computer connected to the internet. A new internet browser window will open showing the webpage **CardioLog Enterprise Manual Activation.**



CardioLog Activation - Windows Internet Explorer

http://demo/CardioLog/LicenseExpired.aspx

CardioLog™ 2011 Usage Reports for SharePoint

CardioLog Activation

Online activation

Manual activation

To get your manual code, go to <http://www.inlock.com/intlocksite/Downloads/updates/manual-activation-ent.asp>

Activation Code:

Manual Code:

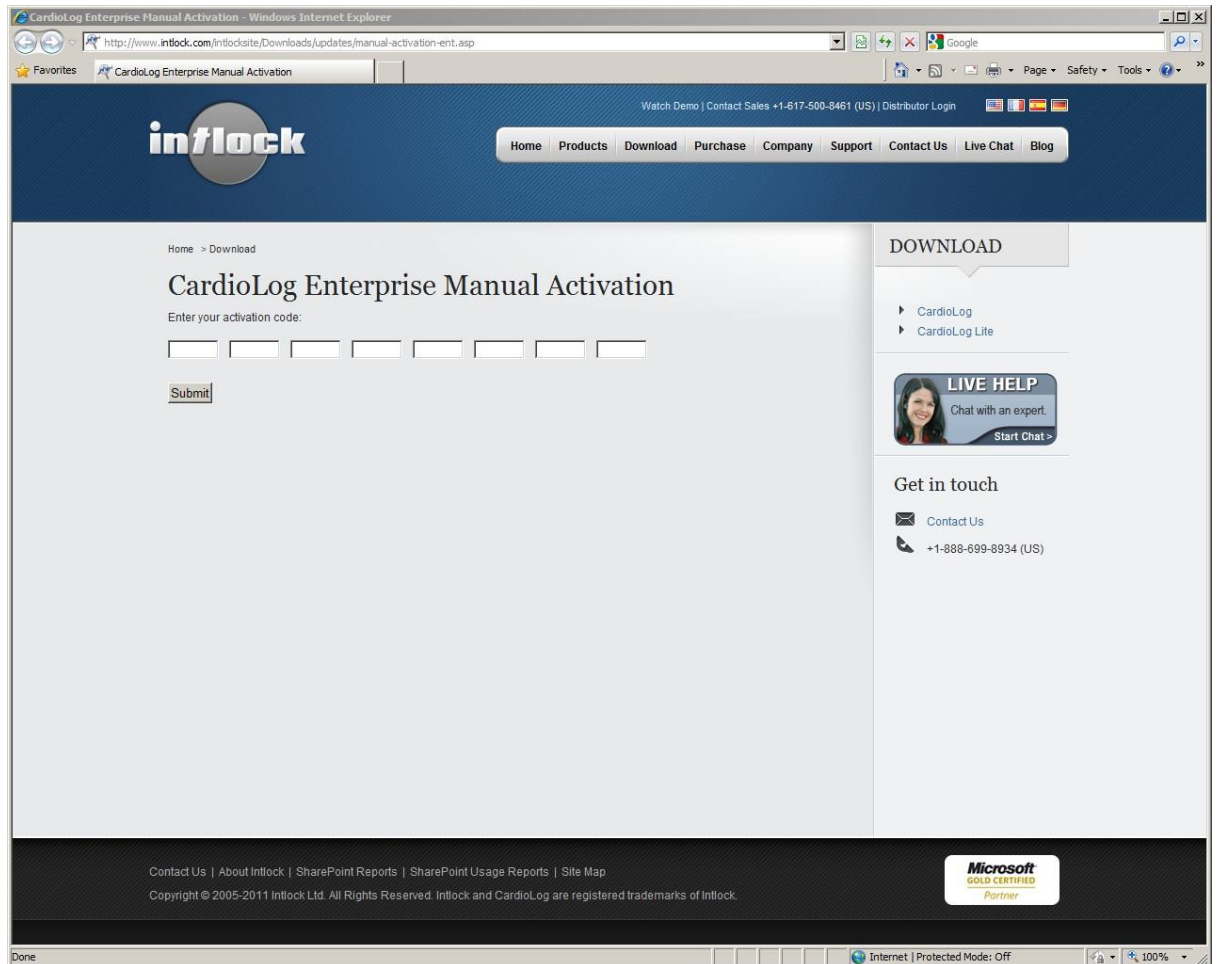
Get online updates

To retrieve periodic product updates, CardioLog will send your product version, activation code and configuration status - to the CardioLog updates service.

Activate

Local intranet | Protected Mode: Off 100%

2.2.2. In the webpage **CardioLog Enterprise Manual Activation**, enter the activation code that you received by email and click **submit** to receive a manual code.

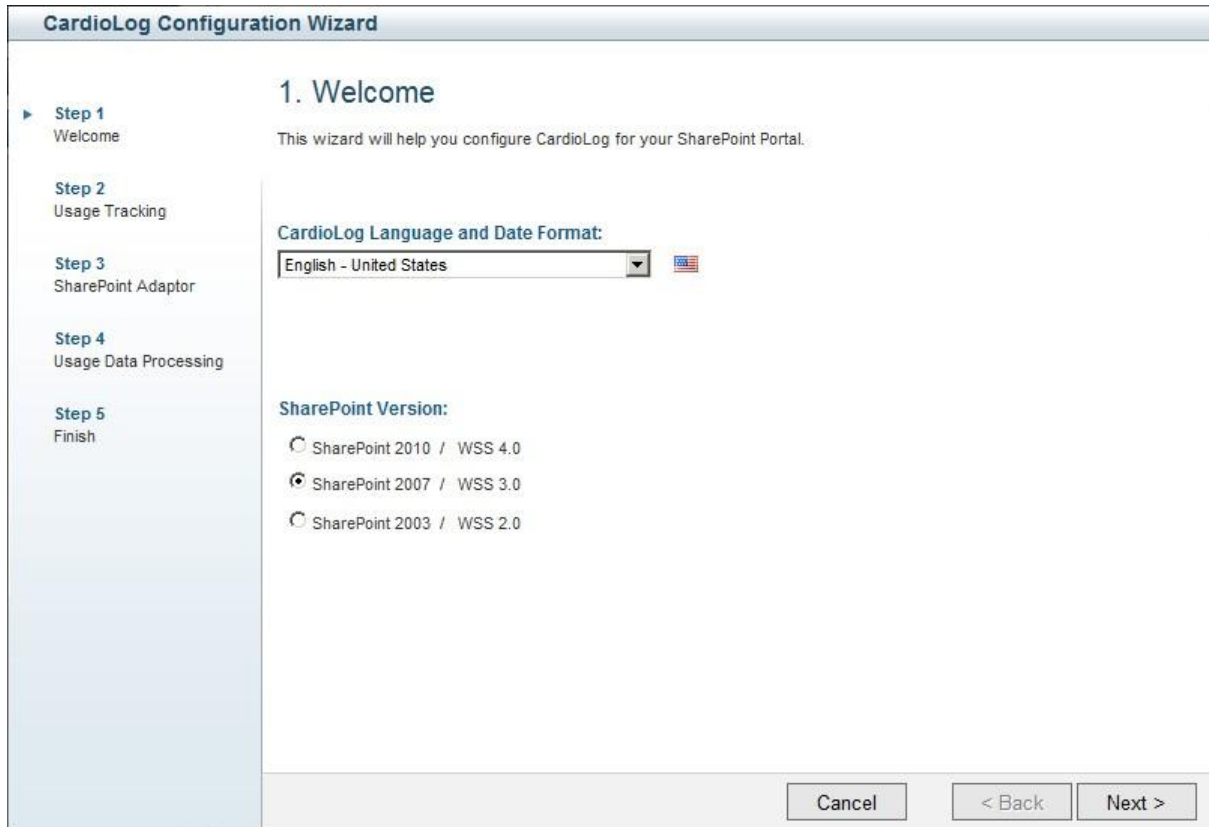


2.2.3. Go back to the **CardioLog Enterprise Manual Activation** page and enter your activation code and the manual code which you now generated. Then click **Activate**.

## 9. Configuring Usage Tracking and Reporting

Upon activating CardioLog, the CardioLog Configuration Wizard will be displayed. This wizard will help you configure the CardioLog modules for your SharePoint Portal. These include the **SharePoint Tracking Agent** - a tool designed to monitor visitor behavior in SharePoint and the **SharePoint Adaptor** - which provides the structure of your SharePoint portal.

1. Launch **CardioLog**.
2. In the **Welcome** dialog, select the desired UI language (including date format) and SharePoint version. Click **Next**.



The screenshot shows the 'CardioLog Configuration Wizard' window. The title bar reads 'CardioLog Configuration Wizard'. On the left, a vertical pane lists five steps: Step 1 (Welcome), Step 2 (Usage Tracking), Step 3 (SharePoint Adaptor), Step 4 (Usage Data Processing), and Step 5 (Finish). Step 1 is currently selected. The main content area is titled '1. Welcome' and contains the text: 'This wizard will help you configure CardioLog for your SharePoint Portal.' Below this, there are two configuration sections. The first is 'CardioLog Language and Date Format:', which includes a dropdown menu set to 'English - United States' and a small US flag icon. The second is 'SharePoint Version:', which has three radio button options: 'SharePoint 2010 / WSS 4.0', 'SharePoint 2007 / WSS 3.0' (which is selected), and 'SharePoint 2003 / WSS 2.0'. At the bottom right of the window, there are three buttons: 'Cancel', '< Back', and 'Next >'.

CardioLog Configuration Wizard

3. In the **Usage Tracking** dialog, enter the SharePoint WFE name and select **Yes** to let CardioLog add the tracking code automatically to all SharePoint pages served by the WFE (the tracking code is added to init.js in SharePoint 2010, and core.js in SharePoint 2007).

Click **Show Advanced Settings** to edit the CardioLog Agent location (domain and port).

Select **Require secure channel (SSL)** if your SharePoint portal runs on SSL and you have configured the CardioLog website for both http and https.

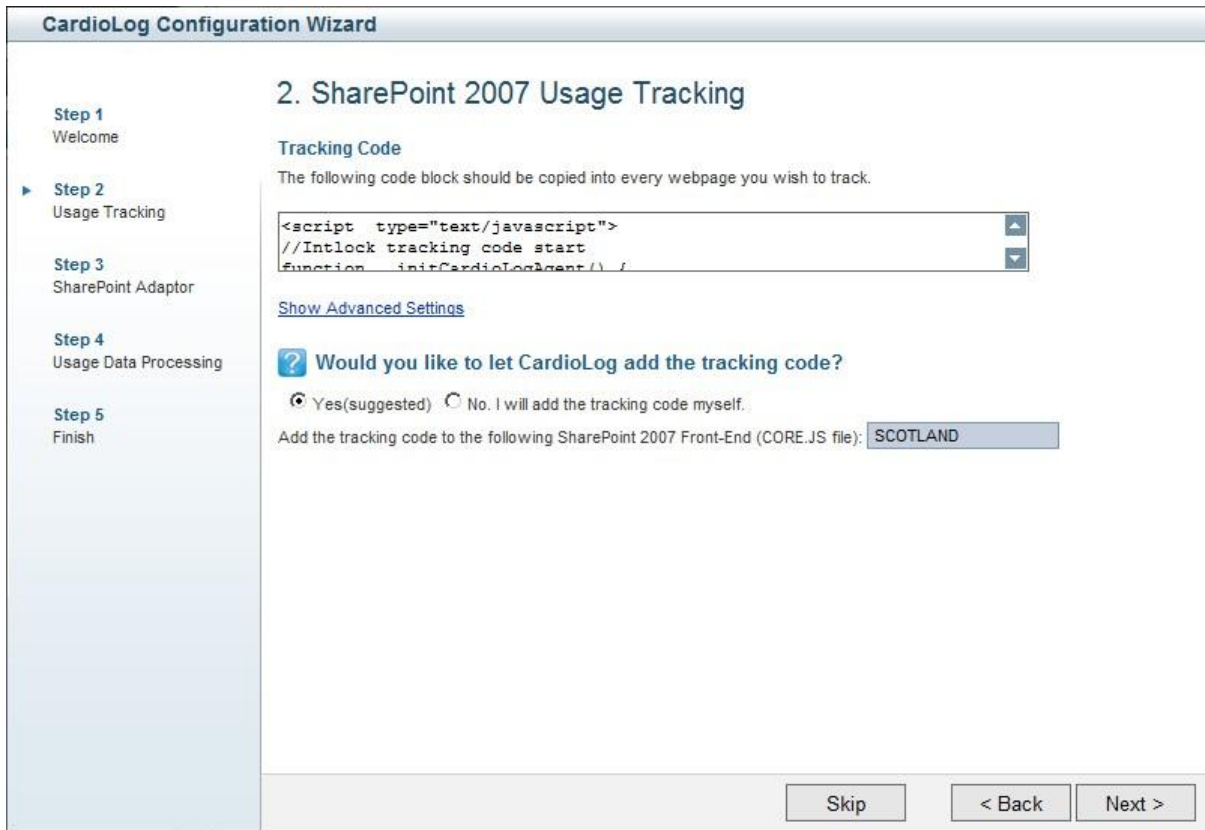
**Note:** The CardioLog service account must have write permissions to the SharePoint template directory:

[SharePoint 2010 Server]\%PROGRAMFILES%\Common Files\Microsoft Shared\web server extensions\14\TEMPLATE

[SharePoint 2007 Server]\%PROGRAMFILES%\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE

If you wish to add the tracking code yourself - select **No** and copy the JavaScript tracking code to a common page component of your choice - such as master pages, page toolbars, Web Parts, footer, etc. If you choose a common JavaScript (.js) file, verify you have removed the opening and closing <script> tags!

Click **Next**.



**CardioLog Configuration Wizard**

Step 1  
Welcome

▶ Step 2  
Usage Tracking

Step 3  
SharePoint Adaptor

Step 4  
Usage Data Processing

Step 5  
Finish

## 2. SharePoint 2007 Usage Tracking

**Tracking Code**

The following code block should be copied into every webpage you wish to track.

```
<script type="text/javascript">  
//Intlock tracking code start  
function _initCardioLogAgent() {
```

[Show Advanced Settings](#)

? **Would you like to let CardioLog add the tracking code?**

Yes(suggested)  No. I will add the tracking code myself.

Add the tracking code to the following SharePoint 2007 Front-End (CORE.JS file):

Skip < Back Next >

### Step 2 – Usage Tracking

- To test the Tracking Agent, go to a SharePoint portal page that includes the tracking agent code. Press Ctrl+F12 (or Alt+F12). The Tracking Agent Console should pop-up and display the ID number for the most recent monitored action (event). To close the console, press Ctrl+F12 (or Alt+F12).  
Click **Yes** if you see the Tracking Agent Console, then click **Next**. If you cannot see the console, or if the ID shows "None", use the wizard to troubleshoot the error or contact [Intlock Support](#).

**CardioLog Configuration Wizard**

**2. SharePoint 2007 Usage Tracking**


**Step 1**  
Welcome

**Step 2**  
Usage Tracking

**Step 3**  
SharePoint Adaptor

**Step 4**  
Usage Data Processing

**Step 5**  
Finish


 The tracking code was added successfully to the following SharePoint 2007 CORE.JS files :  
\\SCOTLAND\CS\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\TEMPLATE\LAYOUTS\1033\VCORE.JS

**Testing the Tracking Agent**

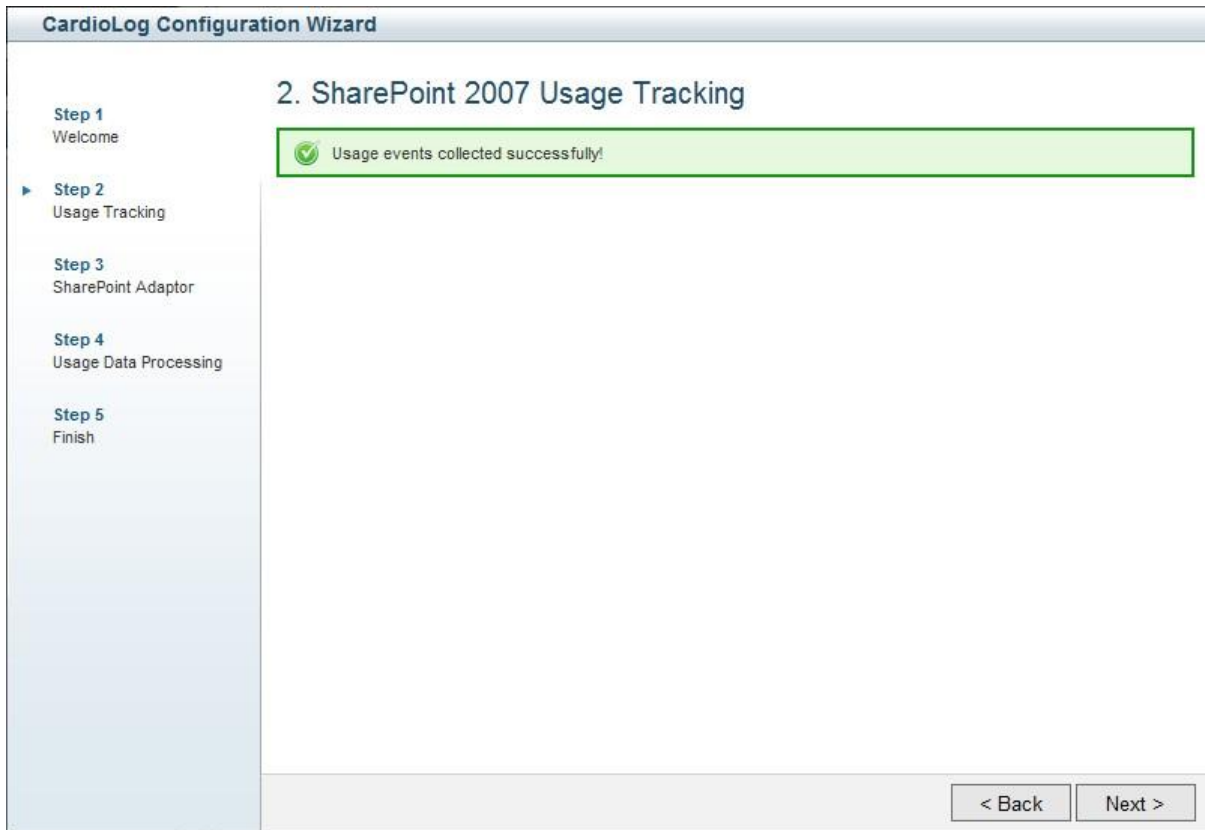
1. Browse 3 SharePoint 2007 portal pages which include the tracking agent code.
2. Press Ctrl+F12 (or Alt+F12). The SharePoint 2007 Agent Console should pop-up, displaying the ID number for the most recent monitored action (event).
3. To close the console, press Ctrl+F12 (or Alt+F12).

**? Do you see the SharePoint 2007 Agent Console pop-up?**

1. [Yes](#)
2. [Yes. The 'Last Event #' is 'None'](#)
3. [No](#)



Step 2 – Usage Tracking



Step 2 – Usage Tracking

5. For multiple SharePoint WFE's - repeat steps 3 - 4 for each WFE.
6. In the **SharePoint Adaptor** dialog, enter the SQL server instance name and the SharePoint configuration database name for your farm. Specify the authentication method used to connect to the database. Click **Next**.

**Note:** Please confirm that the CardioLog service account has read permissions (data reader) for all SharePoint configuration and content databases.



**CardioLog Configuration Wizard**

**Step 1**  
Welcome

**Step 2**  
Usage Tracking

**Step 3**  
SharePoint Adaptor

**Step 4**  
Usage Data Processing

**Step 5**  
Finish

### 3. SharePoint 2007 Adaptor

The SharePoint 2007 Adaptor retrieves the hierarchical structure for a specific SharePoint farm.

SharePoint 2007 Configuration Database  
Specify the name and authentication method for the SharePoint 2007 configuration database.

SharePoint Database Server:  
scotland

SharePoint Configuration Database Name:  
SharePoint\_Config

Database Authentication:  
 Windows authentication  
 SQL authentication

SQL Account:  
[Empty field]

SQL Account Password:  
[Empty field]

Skip    < Back    Next >

Step 3 – SharePoint Adaptor

7. In the **SharePoint Adaptor** dialog, select the SharePoint website/s you wish to report on (use Ctrl+left-click to select multiple websites). Enter the name of one of your SharePoint WFE's. Then click **Next**.

**Note:** Loading your SharePoint tree structure may take several minutes (depending on the number of items in your tree).

**CardioLog Configuration Wizard**

**3. SharePoint 2007 Adaptor**

**Step 1**  
Welcome

**Step 2**  
Usage Tracking

▶ **Step 3**  
SharePoint Adaptor

**Step 4**  
Usage Data Processing

**Step 5**  
Finish

**SharePoint 2007 Web Site**

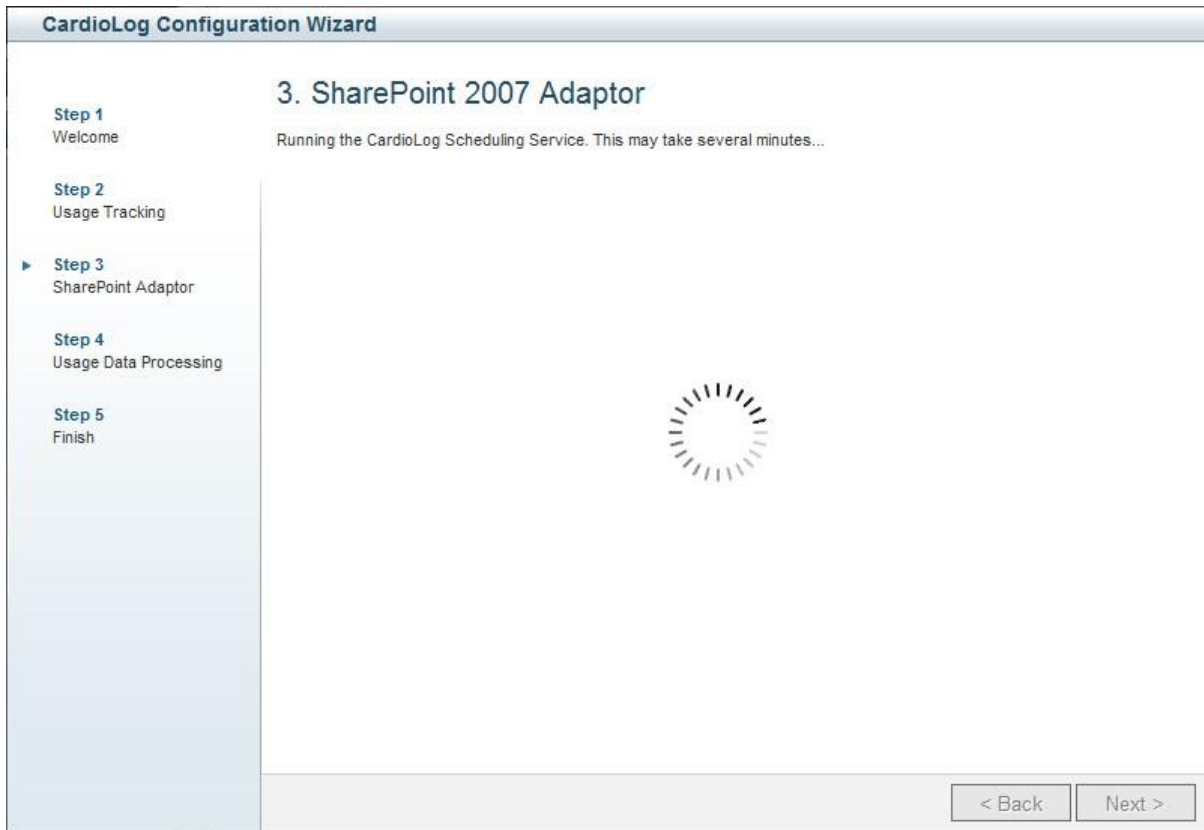
Specify the SharePoint 2007 web sites you wish to report on:

http://scotland:36580
http://scotland:81

SharePoint 2007 server name:  
SCOTLAND

Skip    < Back    Next >

Step 3 – SharePoint Adaptor



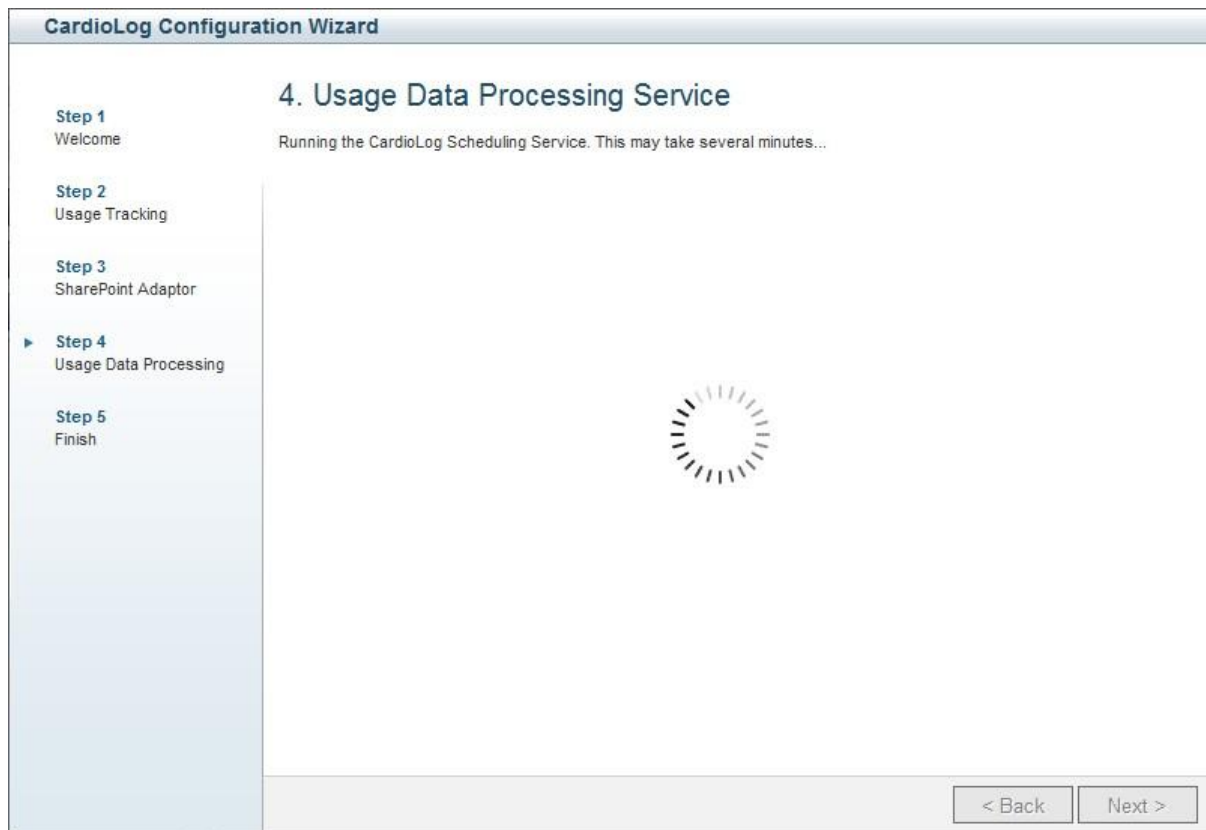
Step 3 – SharePoint Adaptor

8. In the **SharePoint Adaptor** dialog, expand the portal tree and verify that it shows the desired SharePoint web application. Click **Next**.



Step 3 – SharePoint Adaptor

9. In the **Usage Data Processing** dialog, click **Next**.



Step 4 – Usage Data Processing

10. In the **Finish** dialog, click **Finish**. Click **Show Raw Usage Data** to see the events collected so far. The data will be available in the reports within the next rounded hour.

11. For configuring both SharePoint 2007 and SharePoint 2010, repeat steps 1 - 10 for each SharePoint version.

**CardioLog Configuration Wizard**

**Step 1**  
Welcome

**Step 2**  
Usage Tracking

**Step 3**  
SharePoint Adaptor

**Step 4**  
Usage Data Processing

▶ **Step 5**  
Finish

## 5. Finish

✔ Congratulations! You have completed the configuration of CardioLog.  
Reports will be available in the next rounded hour - at 17:00.

[Hide Raw Usage Data](#)

Timestamp	User Name	URL
25/03/2011 14:46:39	MYCOMPANY\DemWil	http://scotland:81/Pages/Default.aspx
25/03/2011 14:44:36	MYCOMPANY\DemWil	http://win-hip2fsdlua3/sites/myteamsite/my
25/03/2011 14:43:05	MYCOMPANY\FreWyl	http://win-hip2fsdlua3/sites/myfastsearchc
25/03/2011 14:43:03	MYCOMPANY\MarKen	http://win-hip2fsdlua3/sites/enterprisesea
25/03/2011 14:41:42	MYCOMPANY\JocBar	http://scotland:81/Pages/Default.aspx
25/03/2011 14:40:55	MYCOMPANY\FreWyl	http://scotland:81/Pages/Default.aspx
25/03/2011 14:40:49	MYCOMPANY\DemWil	http://win-hip2fsdlua3/sites/myfastsearchc
25/03/2011 14:40:44	MYCOMPANY\MarKen	http://win-hip2fsdlua3/sites/mybusinessint
25/03/2011 14:40:39	MYCOMPANY\FraGen	http://win-hip2fsdlua3/sites/mybusinessint
25/03/2011 14:39:53	MYCOMPANY\FiEa	http://scotland:81/SearchCenter/Documents/

Step 5 – Finish

## 10. CardioLog Uninstall Procedure

### 10.1 Running the Uninstall Wizard

1. **Start > All Programs > CardioLog > Uninstall.**
2. Go through the Uninstall Wizard steps.

**Note:** In order to ensure the continuity of usage data collection in repair/upgrade scenarios, the CardioLog installer does **NOT** remove the following components during uninstall:

- CardioLog database
- HKEY\_LOCAL\_MACHINE\SOFTWARE\Intlock\CardioLog registry key
- IIS CardioLog application pool and CardioLog web site
- Usage tracking code on the SharePoint servers
- EventCollector and CardioLogAgent web applications
- Service and Web configuration files

## 11. CardioLog Upgrade Procedure

### 11.1 Running the Uninstall Wizard

1. In order to upgrade CardioLog, you must uninstall your current version before installing the new version. Uninstall ensures data collection continuity.
2. Stop **CardioLog Scheduling Service** and **CardioLog Diagnostics Service**
3. **Start > All Programs > CardioLog > Uninstall.**
4. Go through the Uninstall Wizard steps.

### 11.2 Running the Install Wizard

1. Open CardioLog-2011-xXX-2.0.XXX.XXX.exe
2. Go through the Installation Wizard steps.
3. Start **CardioLog Scheduling Service** and **CardioLog Diagnostics Service**

**Note: If you are upgrading from versions lower than 2.0.2.0:**

Install the following components on the CardioLog server:

1. Microsoft .NET Framework 3.5 Service Pack 1
2. Microsoft Chart Controls for Microsoft .NET Framework 3.5

The download links can be found [here](#).

**Note: If you are upgrading from versions lower than 1.19.158.0:**

For Windows Server 2003 x64 with IIS 6.0, make sure IIS runs in [64-bit mode](#).

For Windows Server 2008 x64 with IIS 7.0, make sure that the CardioLog application pool runs in 64-bit mode:

1. Open IIS Manager > Application Pools > Right click **CardioLogApplicationPool**
2. Select **Advanced Settings** > Click **Enable 32-bit Applications** and select **False**
3. Click **OK** > Right click **CardioLogApplicationPool** and then select **Recycle**

## 11.3 Upgrading a Remote SharePoint Agent

If the CardioLogAgent web application is not installed on the CardioLog server, you will need to upgrade this application separately:

1. Create a backup of the CardioLogAgent directory.
2. Copy the installation files from [CardioLog Installation Directory]\CardioLogAgent to the existing CardioLogAgent directory.

3. Copy the URL domain and port values from the backed-up file

CardioLogAgent\AgentEmbed.aspx to the new file -

```
element.TunnelPath = "http://domain:port/CardioLogAgent/tunnel.aspx";
```

```
element.AgentDirectory = "http://domain:port/CardioLogAgent";
```

```
element.HelpletFile = "";
```

```
element.AgentBaseLocation = "http://domain:port/CardioLogAgent/agentBaseEmbed.aspx";
```

4. Copy the values from the backed-up file CardioLogAgent\web.config to the new file -

```
<add key="requestTimeout" value="10000" />
```

```
<add key="serverResponseTimeout" value="60000" />
```

```
<add key="overwriteConnectedUser" value="false" />
```

5. Copy the custom code changes from the backed-up file CardioLogAgent\CustomAgent\_\*.\*.js to the new file -

```
function addCustomEvents() {
```

```
    // add your code here
```

```
}
```

6. Copy the new custom agent version number from the file [CardioLog Installation Directory]\CardioLogScheduleServices\Setup.config -

```
<add key="customAgentVersion" value="1.*" />
```

To the new CardioLogAgent\AgentEmbed.aspx file –

```
element.CustomAgentVersion = "1.*";
```

## 12. CardioLog Repair Procedure

### 12.1 Running the Uninstall Wizard

1. In order to repair CardioLog, you must uninstall it and then reinstall it. Uninstall ensures data collection continuity.
2. Stop **CardioLog Scheduling Service** and **CardioLog Diagnostics Service**
3. **Start > All Programs > CardioLog > Uninstall.**
4. Go through the Uninstall Wizard steps.

**Note:** In order to ensure the continuity of usage data collection in repair/upgrade scenarios, the CardioLog installer does **NOT** remove the following components during uninstall:

- CardioLog database
- HKEY\_LOCAL\_MACHINE\SOFTWARE\Intlock\CardioLog registry key
- IIS CardioLog application pool and CardioLog web site
- Usage tracking code on the SharePoint servers
- EventCollector and CardioLogAgent web applications
- Service and Web configuration files

### 12.2 Running the Install Wizard

1. Open CardioLog-2011-xXX-2.0.XXX.XXX.exe
2. Go through the Installation Wizard steps.
3. Start **CardioLog Scheduling Service** and **CardioLog Diagnostics Service**