***ECM Library Setup and Installation***

# *Required Software*

Office 2007

SQL Server

ECM Library

# *SECTION 1a:* Prerequisites for Client PC installation

Below is a list of prerequisite software that is required for ECM Library to operate properly on most PC configurations. TheseMicrosoft products need to be installed prior to installing ECM Library.It is important to install these applications in the order in which they are presented:

**Microsoft Windows Installer 4.5**         [(link)](http://www.microsoft.com/downloadS/details.aspx?familyid=5A58B56F-60B6-4412-95B9-54D056D6F9F4&displaylang=en)

**Microsoft Windows Power Shell (validation required)**     [(link to Vista power shell and others)](http://www.microsoft.com/downloads/details.aspx?FamilyId=C6EF4735-C7DE-46A2-997A-EA58FDFCBA63&displaylang=en)

**Microsoft NET 3.5**     [(link)](http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en)

**Microsoft NET 3.5 SP1**     [(link)](http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en)

# *SECTION 1b:* Prerequisites for running a demo version

ECM Library supports a “demonstration” version that allows both the client application and the server repository application to reside on the same computer. To install any server version of ECM Library, we expect a SQL Server or computer administrator to be involved. To run this demo version, the free version of Microsoft SQL Server 2008 will need to be downloaded and installed on the same computer. You will also need SQL Server Management Studio to run the “restore” in ECM Library. (The restore process allows the ECM Library repository to be attached to the server database.)

To install the server version of ECM Library, first complete the four above prerequisite software installations. After you have completed the four above prerequisites listed in Section 1a you are ready to follow the procedures listed in the Section 2b below.

# *SECTION 2a:* SQL Server install

**Server Version: If SQL Server is not already installed at your site, you will need to install SQL Server 2005 or 2008, either Standard or Enterprise or Express for small organizations.** SQL Server 2008 is recommended for best performance of ECM Library.

**Microsoft SQL Express** [SQL Server 2008 Download Site](http://www.microsoft.com/express/sql/download/)

*SQL Server Management Studio.* Please install this application next. Although this is not required to run the product, it will be needed if there is any work or changes to be done to the database in the future.

**Microsoft Management Studio** ([link](http://msdn.microsoft.com/en-us/library/ms365247.aspx))

# *SECTION 2b:* SQL Server install for personal computer demo version

**If you wish to use the free version of SQL Server Express, we recommend “*SQL Server 2008 Express with Advanced Services”* from the list of SQL versions on the website link below. Please note that you are limited to approximately 4 Gigabytes of data on the free version.**

**Microsoft SQL Express** [SQL Server 2008 Download Site](http://www.microsoft.com/express/sql/download/)

*SQL Server Management Studio.* Please install this application next. Although this is not required to run the product, it will be needed if there is any work or changes to be done to the database in the future.

**Microsoft Management Studio** ([link](http://msdn.microsoft.com/en-us/library/ms365247.aspx))

**SQL Server 2008 Service Pack 1** [(link)](http://www.microsoft.com/downloads/details.aspx?FamilyID=66ab3dbb-bf3e-4f46-9559-ccc6a4f9dc19&displaylang=en) WHAT IS OUR EXPLANATION FOR THIS??? SEE BELOW (Maybe you meant to get rid of this)

# *SECTION 3:* SQL Server and ECM Library Utility Programs

This is a required product as we will from time-to-time send out “automated updates and changes” that require the installation of this product in order to work correctly. Is this

**Microsoft SQL Server 2008 Feature Pack** [(link)](http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=b33d2c78-1059-4ce2-b80d-2343c099bcb4)

This download is only needed if you have Visual Studio installed on your computer and if you have SQL 2008 installed and have not applied the Service Pack. I DON’T GET THIS EXPLANATION - WILL THEY?? Also is this needed for the demo version?

**Microsoft Visual Studio 2008 Service Pack 1** [(link)](http://www.microsoft.com/downloads/details.aspx?FamilyId=FBEE1648-7106-44A7-9649-6D9F6D58056E&displaylang=en) -

# *SECTION 4a:* Install ECM Library Client Application

The following link will take you through the ECM Library setup and for client workstations.

[Install the Software](http://www.ecmpoint.com/demo) This will install the application on your computer.

# *SECTION 4b :* Administrator Install ECM Library and the Repository

The following links will take you through the ECM Library setup and database install.

[Download the Database](http://www.ecmlibrary.com/DBDownload/ECM.Library.bak) This will download a backup of our repository. You must restore it using SQL Server to the name ECM.Library.

[Download the Thesaurus](http://www.ecmlibrary.com/DBDownload/ECM.Thesaursus.bak) This will download a backup of our thesaurus. You must restore it using SQL Server to the name ECM.Thesaurus

[Acquire a license](http://www.ecmpoint.com/License) The product will not run until it is licensed. Please contact support for a license or if you have a valid customer number, you can get it from the license server. For demo licenses, please select the DEMO license check box. They will be good for 21 days. Can we make it 30?

# *SECTION 5:* How to set up the Application Configuration File

There are two ways to set up the application configuration file so that it will run with your particular instance of ECM Library and your SQL Server repository.

First Method: The easiest way is to allow the application to install and then use the automated configuration screen provided from within ECM library.

1. When ECM Library has started for the first time, go into the administration function, “Edit the Application Configuration File”, open the screen, press the select servers button, select your Database from the drop down, and press the button that will automatically apply the changes for you.
2. Save the changes
3. Make a backup
4. Exit and restart the application.

Second Method: Go in and configure it manually. If you are comfortable in making changes to files and saving your work, this will represent no problem either.

Step 1 – Backup up the APP.CONFIG file so that you can start over if needed.

Step 2 – Edit the APP.CONFIG file using notepad or another wide character editor. Find the path to the APP.CONFIG file using the desktop shortcut or use the ADMIN function XXXX to get to the application directory.

Step 2 – The only change in this file is the occurrences of SP6000. This is the ECM Server in our environment. SP6000 must be changed to the name of the server in your environment. A simple edit and replace will work. Once the change is made, save the file back to its original name in the original directory and it is done.

# *FINAL NOTE:* Why did we develop ECM Library to run on the workstation?

### We quote Microsoft:

Web applications are limited in many ways, yet a large number of Web applications have been built over the last few years and more will continue to be developed going forward. Why do companies choose a Web-based solution over a rich client experience? There are a few good reasons, but the number one reason I hear is deployment.

When a company decides to create a new application for their employees, regardless of the type of system being designed, the discussion eventually moves to the issue of deployment. The system will need to be rolled out to the target users, and there needs to be a plan in place to handle ongoing updates (bug fixes, new feature releases, and so on). Years of experience with rolling out desktop applications have left most developers and IT staff with a good idea of the pain involved in client deployments, and a Web application ends up being the easier path. Of course, there are some tradeoffs in going with a browser-based Web application versus a rich-client application, but the fear of deployment usually makes those compromises acceptable. What we really need is a model for deploying client applications that is as easy and as safe as deploying a Web application, removing the need to compromise on the functionality of our applications. That is what "ClickOnce" brings to the table.

"ClickOnce" is a code name for a set of functionality in the next version of Microsoft® Visual Studio® .NET and the Microsoft® .NET Framework. It will allow us to create desktop applications that are deployed with a safe, system-controlled installation, and are automatically updated as needed from a central location. Does this mean we use ClickOnce? I think we should say this if we do.

## There are two main reasons to develop for the Web instead of for the client machine:

* The first reason is a need to limit your application to the lowest common denominator (the Web browser) in an effort to reach almost any device that can access the network. Web applications aim for "reach" not "rich," supporting the widest number of clients at the cost of some functionality.
* The second reason is the ease of installation and ongoing updates. The ability to apply a bug fix onto a single machine or a small set of machines, instead of requiring the new code to be applied on every single client, is an amazing time saver in the maintenance of an application.

Going for reach is critical when your goal is to ensure availability to almost any device that can connect to the Web, but if you are dealing with a slightly narrower target audience, such as "employees and partners of my company," then reach isn't as much of an issue. Once you've reduced your target audience to something a little bit less than everything and everyone, you can constrain the target platform (Windows machines capable of supporting the .NET Framework) and then take advantage of that platform by building a full desktop application. ClickOnce allows you to do this by providing the second part of the equation: easy installation and automatic updates for your applications.

For the full explanation, please see the link below:

[One Location all Updates Centralized](http://msdn.microsoft.com/en-us/library/ms996413.aspx)