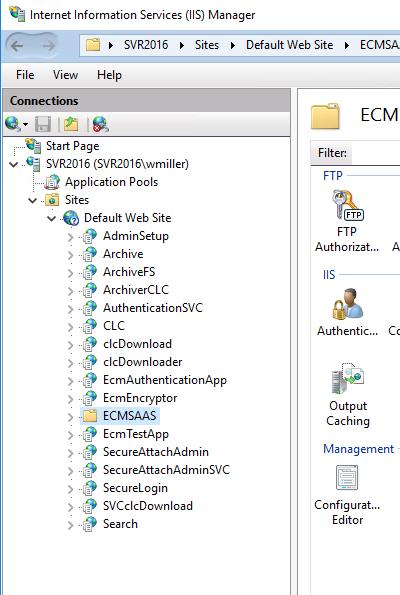
ECM Upgrade / Install

1. Server Requirements
   1. Windows server 2012 R2 thru 2017
   2. Windows Management Framework 5.1 (only if needed)  
      (https://www.microsoft.com/en-us/download/details.aspx?id=54616)  
      ***also supplied in the Required Software Zip File***
   3. PowerShell 4.0 or higher (installed thru above)
      1. Only if needed - <http://www.microsoft.com/en-us/download/details.aspx?id=40855>  
         *Note: Will should not be needed on Server 2012 R2 and Greater (Windows PowerShell 4.0)*
   4. SQL Server 2014 or 2016
2. Install Overview
   1. Download the installation PowerShell Scripts
      1. <http://www.ecmlibrary.com/ECMSaaS/_PSscripts/PSscripts.zip>
      2. password: Ecm2018
      3. MODIFY THE PARAMETERS IN:
         1. ECM.PS.VARS.txt
         2. GrepReplace.ps1
         3. \_Step07-ConnectionStrings.ps1
         4. \_Step08-GrepFindOpen.ps1
   2. Create Server using WS 2012 R2 or greater
      1. Add ISS
      2. Add Remote Access (if allowed)
      3. Install SQL Server 2014 or greater
      4. Install .Net 4.5 or greater
   3. Download and install 3rd party software
      1. 7-Zip
         1. <http://www.ecmlibrary.com/ECMSaaS/_Software/7z_Install/7z1700-x64.exe>
         2. <http://www.ecmlibrary.com/ECMSaaS/_Software/7z_Install/7z920.msi>
         3. Add 7z to the Environment Variable path
      2. <http://www.ecmlibrary.com/ECMSaaS/_Software/Cygwin.zip>
      3. <http://www.ecmlibrary.com/ECMSaaS/_Software/PowerShell_5.0.zip> ***(only if needed)***
      4. <http://www.ecmlibrary.com/ECMSaaS/_Software/Office2007.zip>
      5. <http://www.ecmlibrary.com/ECMSaaS/_Software/SharePointDesignerMODI.zip>
      6. <http://www.ecmlibrary.com/ECMSaaS/_Software/iFilters.zip>
      7. <http://www.ecmlibrary.com/ECMSaaS/_Software/ServerSideOCR.zip>
   4. Configure SQL Server
      1. Create Databases
         1. <http://www.ecmlibrary.com/ECMSaaS/EcmUploadZip/EcmDBScripts/EcmDBScripts.zip> password: Ecm2018
         2. Easiest to use SSMS to create the databases (note: however, there are scripts that can be modified to create each database)
            1. ECM.Hive
            2. ECM.Language
            3. ECM.Library.FS

Enable full text indexing

Specify the file store directory

* + - * 1. ECM.SecureLogin
        2. ECMGateway
        3. ECM.Thesaurus
      1. Execute each DB script
         1. 10.0.0.12.ECM.Hive.sql
         2. 10.0.0.12.ECM.Language.sql
         3. 10.0.0.12.ECM.SecureLogin.sql
         4. 10.0.0.12.ECM.Thesaurus.sql
         5. 10.0.0.12.EcmGateway.sql
         6. 10.0.0.12.TDR.sql
         7. 10.0.0.12.ECM.Library.FS.sql
         8. \_ECM.Library.FS.initial.Data.sql
         9. Note: After the databases are created within SQL Server, execute the 10.0.0.2 scripts to create the DB components
      2. Update Thesaurus database’s data
         1. If the data in the DB is not present do this, otherwise, skip this step.
         2. The Thesaurus database requires initial data. This file is substantial in size. Power Shell script 10 applies this data to the database. It can run for a while depending upon processor speed and SQL Server. Please note that this script will ***TRUNCATE*** all existing data in the database and reapply only the supplied data. Therefore, if you have customized data in the Thesaurus database, it will be lost. Make a backup first.
    1. Create DB Users if needed
    2. Create Full Text indexes if needed in ECM.Library.FS
    3. Create File Stores if needed in ECM.Library.FS
    4. Load the initial data into ECM.Library.FS (\_ECM.Library.FS.initial.Data.sql)
  1. Configure IIS
     1. Application Pools
        1. .Net 4.5
           1. .NET CLR Version v4.0.x
           2. Managed Pipeline – Integrated
           3. Start application pool immediately - Checked
        2. .Net 4.5 Classic
           1. Managed Pipeline – Classic
        3. DefaultAppPool
        4. ECM
        5. EcmAppPool
        6. RDWebAccess
           1. .NET CLR Version v4.0.x
           2. Managed Pipeline – Integrated
           3. Start application pool immediately – Checked

1. Verify ALL server names and IP Addresses are set correctly
   1. Config files
      1. App
      2. Web
   2. Deploy files
2. Pre-migration
   1. Compile all programs
      1. Cd D:\dev\EcmMasterSingleSource\ECM\\_EcmSaaS.BAT
      2. \_ECM\_EcmAdminSetup.bat
      3. \_ECM\_EcmArchiveSaaS.bat
      4. \_ECM\_EcmGatewayAdmin.bat
      5. \_ECM\_EncryptionProgram.bat
      6. \_ECM\_GateWayAdmin.bat
      7. \_ECM\_Search.bat
      8. \_ECM\_ServerSideOCR.bat
3. Setup PowerShell parameters
   1. ECM.PS.VARS.txt
   2. \_Step07-ConnectionStrings.ps1
      1. Set connection strings
      2. Set general variables
      3. The Encryption module will be needed
4. Setup ECM Server
   1. Install .Net frameworks (4.5 and 4.6)
   2. Enable IIS on the WEB services server
   3. Install and enable SQL Server 2014 or 2016 (2012 is acceptable but will be obsolete in 2018)
      1. Create databases
         1. ECM.Library.FS
         2. ECM.SecureLogin
         3. ECM.Thesaurus
         4. EcmGateway
      2. Enable FULL TEXT indexing on ECM.Library.FS
   4. Enable FTP (if only briefly, this will make life easier as local edits and modifications can be directly uploaded)
   5. Install required 3rd party software
      1. C:\inetpub\wwwroot\ECMSaaS\EcmUploadZip\ReqSoftware
      2. Unzip to a Directory where each needed package can be installed.
      3. Install 7z and place it in the execution path in Environment Variable “PATH”
      4. Install PowerShell 5.0 if not installed
      5. Install SharePoint Designer (MODI)
      6. Install all of the iFilters
         1. The PDF filter(s) will install into C:\Program Files\Adobe\Adobe PDF iFilter 9 for 64-bit platforms\bin
            1. PDFFilter.dll
            2. PDFLShim
         2. Copy the Filter’s DLL to the windows path – most likely located in   
            c:\Program Files\Adobe\Adobe PDF iFilter 9 for 64-bit platforms\bin  
            copy this to c:\Windows (for 64 bit systems)
   6. Copy all compiled files to migration directory
      1. D:\dev\EcmMasterSingleSource\ECM\\_EcmSaaS.BAT
      2. D:\dev\EcmMasterSingleSource\ECM\\_ECMInstall\\_PowerShellInstallScripts\_Parsenal\\_CreateInstallationZipFiles.bat
   7. Setup the execution parameters
      1. LoadExecutionVars.ps1
      2. ECM.PS.VARS.txt
      3. Modify all passwords / encrypted strings
         1. **Critical:** \_Step07-GrepReplace.ps1
         2. D:\dev\EcmMasterSingleSource\ECM\EcmEncryption
         3. Use the above to generate and encrypt connection strings
      4. Modify all End Points
         1. **Critical:**\_Step08-GrepFindOpen.ps1
   8. Generate all zip files
      1. \_CreateInstallationZipFiles.bat
   9. FTP all programs to ECM Library server
   10. Go to the server directory C:\inetpub\wwwroot\ECMSaaS\\_Software and UNZIP all files using 7z and the password into that directory.
5. Server Side
   1. FTP Enabled (if only for a short while)
   2. Go to directory C:\inetpub\wwwroot\ECMSaaS\\_Software
      1. Create a directory for each ZIP file in the directory
      2. Extract each respective zip file into its directory
   3. Install PowerShell 5
   4. Install iFilters
   5. Install MODI
      1. Install Office 2007 MODI (performed as part of Step 05)   
         ***OR***
      2. Install SharePoint MODI (performed as part of Step 05)
   6. Install Server Side ECM OCR (performed as part of Step 05)
   7. Install OCR job / task (performed as part of Step 05)
   8. Install iFilters (performed as part of Step 05)
6. Application Configuration
   1. Install 2-way encryption
   2. Install 1-way encryption
   3. Install the Archiver
   4. Install the Archiver Service
   5. Install the Search Client
   6. Install the Search Service
      1. Fill In the following in the Search AppConfig file:
      2. <add key="CUSTID" value="PA-2020" />
      3. <add key="SVRNAME" value="T310" />
      4. <add key="DBNAME" value="ECM.Library.FS" />
      5. <add key="INSTANCENAME" value="" />
      6. <add key="ECMSecureLogin" value="Data Source=T310;Initial Catalog=ECM.SecureLogin;Persist Security Info=True;User ID=sa;Password=@@PW@@; Timeout=30;" />
      7. <add key="ECMREPO" value="Data Source=T310;Initial Catalog=ECM.Library.FS;Persist Security Info=True;User ID=ecmlibrary;Password=@@PW@@; Timeout=30;" />
      8. <add key="ECMLicense" value="Data Source=T310;Initial Catalog=DMA.UD.License;Persist Security Info=True;User ID=sa;Password=@@PW@@; Timeout=30;" />
      9. <add key="UseEncrypted" value="0" />
      10. <add key="UseMasterFile" value="0" />
      11. <add key="UseSecurityDB" value="0" />
      12. <add key="EncPW" value="2RLaSKcN9L42IPlWDjXnvw==" />
      13. <add key="UseEncrypted" value="0" />
      14. <add key="ClientSettingsProvider.ServiceUri" value="" />
      15. <add key="DownloadDIR" value="c:\temp\ECM/Downloads\" />
      16. <add key="WorkingDIR" value="c:\temp\ECM\Working\" />
7. Execute Installation PowerShell Scripts in Order
   1. Step01 – Verify server prerequisites are installed
   2. Step02 –Create needed directories
   3. Step03 –Download needed files
   4. Step04 –Create Databases if they do not already exist
   5. Step05 –Install iFilters
   6. Step06 – Backup any existing ECM Services, configs, files before update
   7. Step07 – Parse each config file and find all substitutions that have to be done
   8. Step08 –Find and replace Endpoints and IP addresses
      1. Step09 – For migration, SSIS error files must exist, generate the starting empty files.
8. IIS Troubleshooting
   1. Review the IIS logs for detailed information
   2. 403 Errors - <https://support.microsoft.com/en-us/help/318380/description-of-microsoft-internet-information-services-iis-5-0-and-6-0>
   3. Finding the content of files can be greatly enhanced using UNIX commands
      1. Install Cygwin
      2. The completed install should look similar to this.