



ERM 1.35 Installation & Upgrade Steps – Stand Alone

(Build 1.3.1016.1)

Installation Steps

Pre-Installation Steps

Before you install, be sure that MS Exchange 2000 Server SP3 or later is up and running correctly and that you can create mailboxes without any problems. You will install your copy of ERM on the same machine as your MS Exchange Server. In order for ERM to install and operate properly, you must also address the following:

1. Log on as administrator to both your local machine and to the MS Exchange Server.
2. Create an ERM Service Account in Active Directory Users and Computers. The ERM Service Account does not have to be mail-enabled, but it does need local administrator rights (Builtin\Administrator if ERM will run on a domain controller). The ERM Service Account should not have any delegated Exchange Administrative rights.
3. Create a MS Exchange mailbox for each resource that you want ERM to manage. (These can be created anytime; you can create more as needed later.)

Stand Alone Installation Steps

Instructions for the InstallShield Wizard are typical of other software programs you have used; the wizard is user-friendly and virtually self-explanatory. **If installing ERM on an Exchange cluster, please review the Cluster Installation Steps prior to installing ERM.**

1. Download [Exchange Resource Manager.MSI](#). If you prefer, you may download [Exchange Resource Manager.ZIP](#) instead.
2. Double-click on the Exchange Resource Manager.MSI to run the InstallShield Wizard.
3. If notified that your machine does not meet ERM requirements, it is recommended that the issue be resolved before continuing with the installation.
4. On the Exchange Information screen, please enter the login information for the ERM Service Account setup in the Pre-Installation steps.
5. If ERM is unable to verify the Service Account information, click **Back** to correct the information or **Cancel** to stop the installation and resolve the problem.
6. The Complete setup is recommended to ensure full ERM functionality.
7. Once the Installation is complete, click **Finish** to exit the InstallShield Wizard.

Registration Steps

Once ERM is installed, it can be registered using your license file by performing the following steps:

1. Copy the purchased license file to the main Exchange Resource Manager Directory (by default, **C:\Program Files\Simpler-Webb\Exchange Resource Manager**).
2. Open the Mailbox Browser (**Start->Programs->Simpler-Webb->Exchange Resource Manager-> Exchange Resource Manager**)
3. Click **Help->About Mailbox Browser**
4. Click the "**Register**" Button and follow the instructions in the User's Guide to register ERM either online or manually (Manual Registration requires a registration number that can be obtained from Simpler-Webb).

Upgrade Steps

Please note that a new license file must be obtained from Simpler-Webb in order to use more than two resources with ERM 1.35. Licenses from previous releases are not compatible with ERM 1.35.

Current maintenance support customers may obtain a license for ERM 1.35 free of charge from Simpler-Webb.>

The following steps should be performed to ensure a smooth upgrade of an earlier ERM release on a standalone

server:

1. If you are upgrading from an older version of ERM (ERM 1.0 or ERM 1.2), email info@swinc.com to request an updated license file from Simpler-Webb. Do not attempt to upgrade your existing ERM installation prior to obtaining a license file from Simpler-Webb.
*****Please note that it is not necessary to request for an upgrade license if you are currently running ERM 1.3.**
2. Once an ERM 1.35 license file is obtained from Simpler-Webb (see step 1, above), copy the file to the main Exchange Resource Manager Directory (by default, *C:\Program Files\Simpler-Webb\Exchange Resource Manager*).
3. Download [Exchange Resource Manager.MSI](#). If you prefer, you may download [Exchange Resource Manager.ZIP](#) instead. Both are available online in the ERM FAQs section of simplerwebb.com.
4. It is strongly recommended that your current ERM database is backed up prior to installing ERM 1.35. This may be done by simply making a copy of the *ERM_RCS.mdb* file to an alternate location. By default, the ERM database is located at *C:\Program Files\Simpler-Webb\Exchange Resource Manager\Data\ERM_RCS.mdb*.
5. Use Microsoft Windows Add or Remove Programs functionality to uninstall Exchange Resource Manager from the server. The un-installation will leave your ERM database, license file(s), and log file in place but will remove the ERM COM+ Component and ERM program code from the server. Please note that ERM-managed resources will not respond to meeting requests sent to managed resources until ERM is re-installed on the server and the event sink is triggered by a meeting request or message arriving in the Inbox of the managed resource.
6. If you are upgrading from an older release of ERM (ERM 1.0 or ERM 1.2), download [upgradetables.vbs](#), also available in the ERM FAQs section of simplerwebb.com. Extract the *upgradetables.vbs* file. From the ERM host-server, double-click the *upgradetables.vbs* script to upgrade your ERM database and registry to the ERM 1.35 schema.

Please note that it is not necessary to run this script if you are upgrading from an older build of ERM 1.35.

7. Double-click on the *Exchange Resource Manager.MSI* file to run the InstallShield Wizard. The installation may be completed by accepting the default values unless you wish to make changes from your prior configuration. Please contact Simpler-Webb prior to making changes to the ERM Service Account or the Exchange Attribute. The same directory location is required in order to successfully access the existing ERM Database and ERM enabled resources.

Registration Steps

Please note that ERM 1.35 is only enabled to support two managed resources until the ERM 1.35 license file is registered.

Once ERM is installed, it can be registered using your license file by performing the following steps:

1. Open the Mailbox Browser (*Start->Programs->Simpler-Webb->Exchange Resource Manager-> Exchange Resource Manager*)
2. Click *Help->About Mailbox Browser*
3. Click the "Register" Button and follow the instructions in the User's Guide to register ERM either online or manually (using the registration number provided with the ERM 1.35 license file from Simpler-Webb).

For more information on ERM or any of Simpler-Webb's products and services, please feel free to contact us:

Simpler-Webb
1717 W. 6TH Street
Suite 140
Austin, TX 78703
(800) 808-3083
info@simplerwebb.com
www.simplerwebb.com