



ERM 1.35 Installation & Upgrade Steps- Cluster

(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.)

Cluster Installation Steps

For Exchange Resource Manager (ERM) to correctly failover from one node to another, follow the additional steps in this section, which are pertinent to a cluster installation. Carefully follow the instructions step by step.

1. Install ERM on the active node of the active-passive cluster.
2. In order for ERM to failover to another node, the option must be selected to install the program files to a custom location on a shared drive.
3. Create a cluster resource for ERM:
 - On the active node of the cluster, open the Cluster Administrator.
 - Right-click on the group corresponding to the Exchange Virtual Server and select New >> Resource to start the resource creation wizard.
 - In the New Resource panel, type Exchange Resource Manager in the Name field and ERM in the Description field.
 - Select Generic Application as the Resource Type and the group corresponding to the Exchange Virtual Server in the Group field.
 - Do not enable the "Run this resource in a separate resource monitor" option.
 - Click Next.
 - In the Possible Owners panel, accept the default setting of having both nodes as possible owners and click Next.
 - In the Dependencies panel, select the Exchange Information Store and the shared drive as dependencies and then click Next.
 - In the Generic Application Parameters panel, type <full path to installation directory>\ERMMBList.exe for the command line and <full path to installation directory> for the current directory.
 - Do not select options to allow application to interact with desktop or to use network name as computer name.
 - Click Next.
 - In the Registry Replication panel, click Add and type SOFTWARE\Simpler-Webb\ERM as the root registry key to replicate, and then click OK.
 - Click Finish.
 - Bring the new resource online by right-clicking the resource and selecting Bring Online.
4. Install ERM on additional cluster nodes:
 - From the Cluster Administrator, select the cluster group and then select Move Group to bring the cluster group online on the other node.

- Install ERM on the other node of the cluster. The software should automatically detect the current program location and use the same location on this node.

Note: WHEN ERM IS INSTALLED ON A SHARED DRIVE, RESOURCES MAY ONLY BE MANAGED AND CONFIGURED WHEN USING THE ERM MAILBOX BROWSER FROM THE ACTIVE NODE OF THE MS EXCHANGE CLUSTER.

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.

1. If you are upgrading from an older version of ERM (ERM 1.0 or ERM 1.2), complete the [electronic form](#) 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 active node of the cluster. 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](#). Extract the upgradetables.vbs file. From the active node of the cluster, 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.
 8. For each additional node of the cluster, you will need to do the following:
 1. Make the node the active node for the Exchange Virtual Server and ERM
 2. Uninstall ERM from the node using the Windows Add/Remove Programs functionality
 3. 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.
 4. There is no need to re-run the upgradetables.vbs script
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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).
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For more information on ERM or any of Simpler-Webb's products and services, please feel free to contact us:

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