

EPiServer Installation Instructions

Abstract

From EPiServer 4.50, installation and upgrade of EPiServer installations is carried out with EPiServer Manager. This document describes how to install, upgrade and delete an EPiServer installation and is based on installation with the most recently released EPiServer Manager version.

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Introduction

From EPiServer 4.50, online and offline installations and upgrades, and deletion of EPiServer installations is done with EPiServer Manager. The EPiServer software installation program can be found at <http://www.episerver.com/>.

Note Only EPiServer 4 installations can be upgraded offline. Use online installation to upgrade EPiServer 3 installations.

Note This document is based on installation with the most recently released EPiServer Manager version.

Installation Prerequisites

System Requirements

EPiServer currently has the following system requirements.

Supported Operating Systems

Any of the following is required:

- Microsoft Windows 2000 Server with Service Pack 1 or later. This must not be installed as Active Directory root.
- Microsoft Windows Server 2003. This must not be installed as Active Directory root.
- Microsoft Windows XP Professional can be used for demonstration and development purposes.

Database Requirements

Any of the following is required:

- Microsoft SQL Server 2000
- Oracle Database Server 9i
- Oracle Database Server 10g

EPiServer also supports Microsoft SQL Server 7.0, although Microsoft SQL Server 2000 is recommended.

Software Requirements

- Internet Information Services (IIS) Server 5.0 must be installed as part of the Windows 2000 Server installation.
- Internet Information Services (IIS) Server 6.0 must be installed as part of the Windows Server 2003 installation.
- Microsoft Internet Explorer 6.0 or later is required for editors and administrators.
- Microsoft Office 2003 or Microsoft Office XP is required to be able to publish to EPiServer from Microsoft Office.

Any of the following is also required:

- Microsoft .NET Framework 1.1 Redistributable
- Microsoft .NET Framework 1.1 SDK
- Microsoft Visual Studio .NET 2003. This is recommended for development purposes.

Note: .NET Framework 1.1 Service Pack 1 is also required to improve security.

Hard Disk Requirements

- At least 50MB free space on an NTFS-formatted partition.

Licensing

EPiServer cannot be used without a valid license. If the EPiServer installation is to be used for testing and evaluation purposes, a demo license can be created using the link in the installation program. Complete the Web form that appears. You can choose whether to bind the system to an IP address or to the MAC address of the network adapter.

Generate Demo License
Fill in the information below to receive an e-mail with a license code valid for one month.

Product

Company

First name

Last name

E-mail

Bound to

IP Address of server

All fields are required.

MAC Address for Installation

If you are using dynamic allocation of IP addresses (DHCP), you might want to register EPiServer to the MAC address instead of the IP address. The MAC address is a unique identifier for the network adapter and a common standard. To find the MAC address, open a command prompt in Windows and type: `ipconfig /all`.

```
Ethernet adapter Local Area Connection:  
Connection-specific DNS Suffix . :  
Description . . . . . : Network adapter  
Physical Address. . . . . : 02-00-4C-4F-4F-50  
Dhcp Enabled. . . . . : Yes  
IP Address. . . . . : 192.168.0.10  
Subnet Mask . . . . . : 255.255.255.0  
Default Gateway . . . . . : 192.168.0.1
```

The MAC address is found under Physical Address and is entered when generating the license.

Issues When Upgrading EPiServer 4.50 to EPiServer 4.51

Indexing Service

EPiServer Indexing Service, which indexes files for versioned file systems, is not compatible with EPiServer 4.50. This means that all Web sites using file system versioning and the search functionality must be upgraded to 4.51 simultaneously.

Log Service

EPiServer 4.50 sites where the Log Service with the example analyzer TimeSpanAnalyzer has been activated must be updated in order for the saved historical data for pages to be displayed. The program for update can be obtained from EPiServer support (support@ep.se).

WSRP


WSRP registrations and portal page configuration data will be cleared when upgrading from EPiServer 4.50 to 4.51, i.e. you will have to re-register any producer that you want to consume in the EPiServer portal, and any portal setup will also have to be recreated. The 4.50 WSRP templates are not compatible with the 4.51 WSRP design, so you need to download and install the template package after you have upgraded the site.

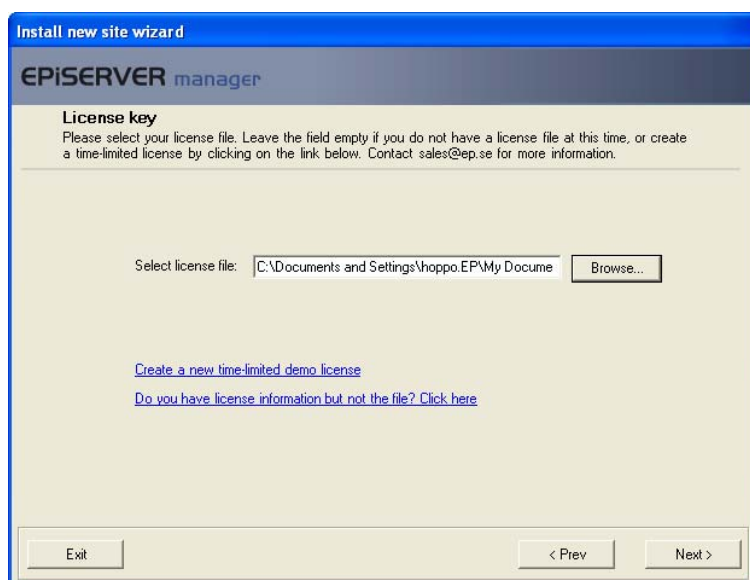
Online Installation and Upgrade

New EPiServer Installation

From EPiServer 4.50, EPiServer is installed using EPiServer Manager. Follow the instructions below to install a new EPiServer installation when your computer has access to Internet.

Note See the "Installing/Upgrading Oracle Versions of EPiServer" chapter for information on how to install Oracle versions of EPiServer.

1. Install EPiServer Manager according to the installation wizard.
2. Open EPiServer Manager.
3. Any existing EPiServer sites are displayed in the folder list. Right-click the folder root and select **Install...**, or click  in the toolbar. This opens the wizard that will guide you through your installation.
4. Browse to your license file and click **Next**. Alternatively, follow the link if you want to create a time-limited demo license.



5. Click **Online** and select the version you want to install from the **Install version** list. The latest version appears at the top of the list. Click **Next**.
6. Enter a name for the site to be installed in the **Site name** box and add a virtual directory name if you wish. Click **Next**.

- In the **Database** area, select a server that the database you intend using is installed on. If the database is local, i.e. on the same machine you intend installing EPiServer, select **(local)**. **(default)** in the **Port** field defines the database server's default port. If you wish to install to another database server port, change the value to the desired port number.

Select the name of the database you intend using from the **Existing Database** list or enter the name of a new database.

Note The database must be installed and configured before you start installing EPiServer. Make sure that the specified user has owner rights to the database. Database installation instructions can be found in the Readme file supplied with the installation program.

- In the **User** area, select an existing user or create a new user that has owner rights to the database specified above. In the **Password** box, type the password associated with the specified user.
- Select the **Do not install database** check box if you do not wish to install a database for the EPiServer site. Click **Next**.

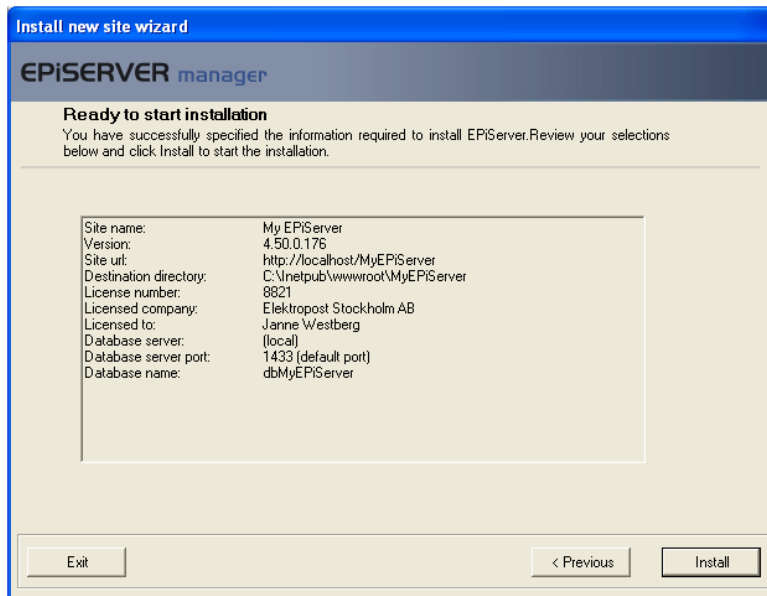
The screenshot shows the 'Install new site wizard' dialog box for EPiServer manager. The title bar reads 'Install new site wizard' and the application name is 'EPiSERVER manager'. The main heading is 'Database setup/creation'. Below this, a note states: 'The database should be an empty or already existing EPiServer database of correct version. If you create the user account manually you must add it to the role "Database Owner".'

The form contains the following fields and options:

- Server:** A dropdown menu set to '(local)'. **Port:** A dropdown menu set to '(default)'.
- Database:**
 - Existing Database: A dropdown menu.
 - New Database: A text box containing 'dbMyEPiServer'.
- User:**
 - Existing user: A dropdown menu.
 - New User: A text box containing 'MyEPiServer'.
 - Password:** A text box with masked characters (dots).
 - Confirm Password:** A text box with masked characters (dots).
- Do not install database

At the bottom of the dialog, there are three buttons: 'Exit', '< Previous', and 'Next >'.

- Create an administration account that you can later use for logging on to the Web site for the first time. You can simply delete this account later, if you want. Type the user name you want to use to log on to the Web site for the first time in the **User name** box. Type the password you want to associate with the user specified above in the **Password** box and confirm the password. Select **Next**.
- Check the settings that you have entered and click **Finish** to install EPiServer. Click **Previous** to return to any dialogs to change the information you have entered.




When the installation procedure is complete, a folder has been created under "Program Files\EPIserver4" named **Download**. This folder contains files that have been downloaded to allow the tool to be installed. It also contains a text file, **upgrade.log**, which describes the installation procedure. This file can be sent to Support if an error that you require help with has occurred during the installation or upgrade procedure.

Important! If there were no problems during the installation procedure, delete the file "Program Files\EPIserver4\Upgrade.log" from the computer for security reasons. This file contains sensitive information, such as information for connecting to the database.

Upgrade EPIserver Installation Online

Follow the instructions below to upgrade an EPIserver installation when your computer has access to Internet.

Note See the "Installing/Upgrading Oracle Versions of EPIserver" chapter for information on how to upgrade Oracle versions of EPIserver.

1. Install EPIserver Manager according to the installation wizard.
2. Open EPIserver Manager.
3. Any existing EPIserver sites are displayed in the folder list. Right-click the site to be upgraded and select **Upgrade...**, or click  in the toolbar. This opens the wizard that will guide you through your upgrade.
4. Click **Online** and select the version you want to install from the **Install version** list. The latest version appears at the top of the list. Click **Next**.
5. Check the settings that you have entered and click **Finish** to install EPIserver. Click **Previous** to return to any dialogs to change the information you have entered.

Offline Installation and Upgrade

EPIserver Manager enables offline installation, which means that EPIserver can be installed on machines that are located behind a firewall and do not, therefore, have access to Internet. Offline installation also allows installation on laptop computers that are not connected to Internet.

In order to install and upgrade EPIserver offline, you must first use EPIserver Manager to create a .zip file containing the appropriate files. This step is described in the "Create Offline Installation" chapter.

Note Only EPiServer 4 installations can be upgraded offline. Use online installation to upgrade EPiServer 3 installations.

Note See the "Installing/Upgrading Oracle Versions of EPiServer" chapter for information on how to install and upgrade Oracle versions of EPiServer.

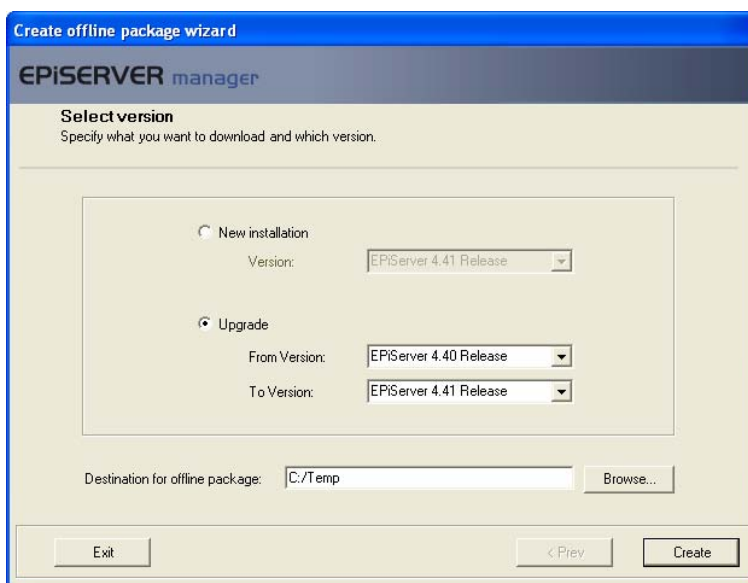
Create Offline Installation

Follow the instructions below to create the .zip file that contains the files used to install and upgrade EPiServer offline.

1. Install EPiServer Manager according to the installation wizard.
2. Open EPiServer Manager.
3. On the **Tools** menu, click **Create offline installation...** This opens the wizard that guides you through the creation of your offline files.
4. Browse to your license file and click **Next**. Alternatively follow the link if you want to create a time-limited demo license.
5. Click **New installation** or **Upgrade**.

If you want to do a new installation offline, select the EPiServer version you want to install from the drop-down list.

If you want to upgrade an EPiServer site, select the version to be upgraded in the **From Version** drop-down list and the version that you want to upgrade to in the **To Version** drop-down list.




6. Enter a destination where the .zip file will be saved. Click **Create**.

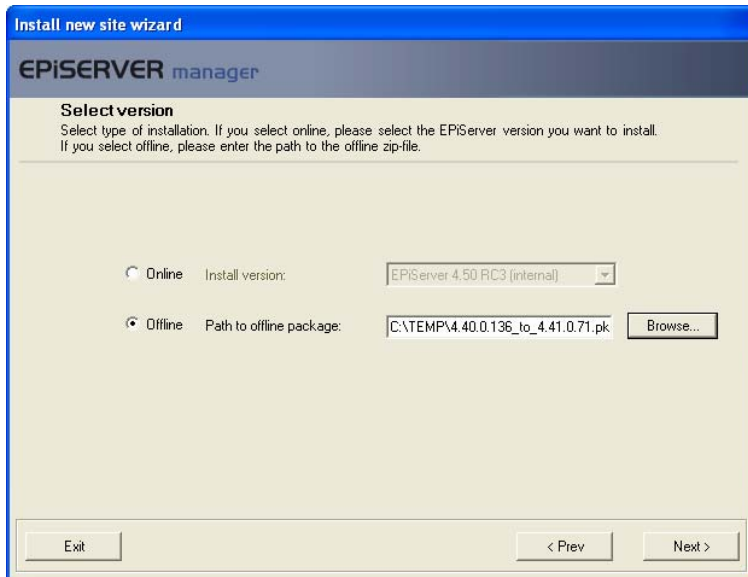
Note Remember where the .zip file is saved. You cannot install or upgrade an EPiServer installation offline without it.

Installing EPiServer Offline

Follow the instructions below to install a new EPiServer installation when your computer does not have access to Internet.

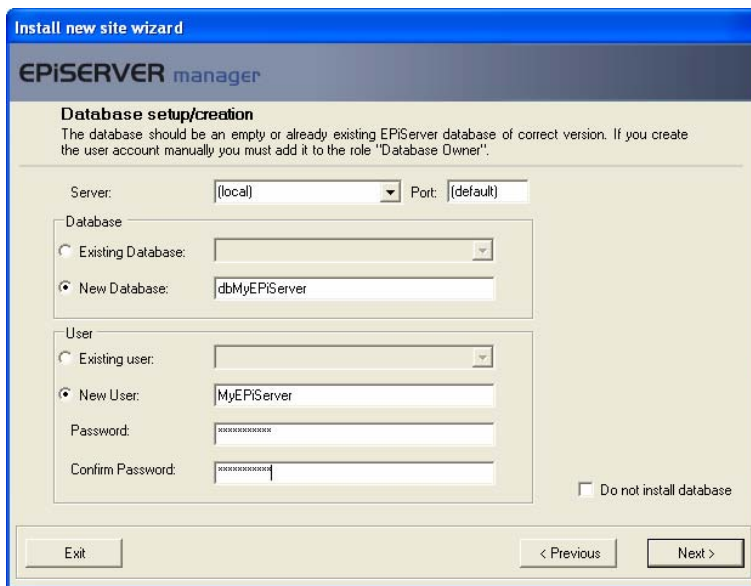
1. Create an offline .zip file containing the installation files as described in the "Create Offline Installation" chapter.
2. Open EPiServer Manager.

3. Any existing EPiServer sites are displayed in the folder list. Right-click the folder root and select **Install...**, or click  in the toolbar. This opens the wizard that will guide you through your installation.
4. Browse to your license file and click **Next**. Alternatively follow the link if you want to create a time-limited demo license.
5. Click **Offline** and browse to the folder that contains the .zip file that you have previously created containing the offline files.



6. Enter a name for the site to be installed in the **Site name** box and add a virtual directory name if you wish. Click **Next**.
7. In the **Database** area, select a server that the database you intend using is installed on. If the database is local, i.e. on the same machine you intend installing EPiServer, select **(local)**. **(default)** in the **Port** field defines the database server's default port. If you wish to install to another database server port, change the value to the desired port number. Select the name of the database you intend using from the **Existing Database** list or enter the name of a new database.

Note The database must be installed and configured before you start installing EPiServer. Make sure that the specified user has owner rights to the database. Database installation instructions can be found in the Readme file supplied with the installation program.
8. In the **User** area, select an existing user or create a new user that has owner rights to the database specified above. In the **Password** box, type the password associated with the specified user.
9. Select the **Do not install database** check box if you do not wish to install a database for the EPiServer site. Click **Next**.



10. Create an administration account that you can later use for logging on to the Web site for the first time. You can simply delete this account later, if you want. Type the user name you want to use to log on to the Web site for the first time in the **User name** box. Type the password you want to associate with the user specified above in the **Password** box and confirm the password. Click **Next**.
11. Check the settings that you have entered and click **Finish** to install EPiServer. Click **Previous** to return to any dialogs to change the information you have entered.

When the installation procedure is complete, a folder has been created under "Program Files\EPiServer4" named **Download**. This folder contains files that have been downloaded to allow the tool to be installed. It also contains a text file, **upgrade.log**, which describes the installation procedure. This file can be sent to Support if an error that you require help with has occurred during the installation or upgrade procedure.


Important! If there were no problems during the installation procedure, delete the file "Program Files\EPiServer4\Upgrade.log" from the computer for security reasons. This file contains sensitive information, such as information for connecting to the database.

Tip! Always read the Readme file which comes with the installation files. This provides information about further steps which may need to be taken to ensure installation is complete.

Upgrading EPiServer Offline

Follow the instructions below to upgrade an EPiServer installation when your computer does not have access to Internet.

Note Only EPiServer 4 installations can be upgraded offline. Use online installation to upgrade EPiServer 3 installations.

1. Create an offline .zip file containing the upgrade files as described in the "Create Offline Installation" chapter.
2. Open EPiServer Manager.
3. Any existing EPiServer sites are displayed in the folder list. Right-click the site to be upgraded and select **Upgrade...**, or click  in the toolbar. This opens the wizard that will guide you through your installation.
4. Click **Offline** and browse to the folder that contains the .zip file that you have previously created containing the offline files. Click **Next**.
5. Check the settings that you have entered and click **Finish** to install EPiServer. Click **Previous** to return to any dialogs to change the information you have entered.

Installing/Upgrading Oracle Versions of EPiServer

Setting Up Oracle Server

The Oracle version of EPiServer requires a few extra files and a special license file. You can request these from support@ep.se since these files are not included in the standard installation.

Setting Up Oracle Database

Follow the instructions below to set up the Oracle database.

1. Log on to the Oracle database server with SQL*Plus, as the SYSTEM user.
2. Create tablespace for the EPiServer database.
The following names and paths are just examples, adjust as suitable for your environment. The size specifications may need to be adjusted, but should be enough for a medium-sized Web site.

```
CREATE TABLESPACE EPISERVER_DATA1
LOGGING DATAFILE '/oracle/oradata/epdev/EP_DATA1.ora'
SIZE 50M
EXTENT MANAGEMENT LOCAL;
```

3. Create a user and give the user basic rights.

```
CREATE USER EPISERVER IDENTIFIED BY PASSWORD
DEFAULT TABLESPACE EPISERVER_DATA1
TEMPORARY TABLESPACE TEMP;
```

```
GRANT CONNECT, RESOURCE TO EPISERVER;
```

4. Logout from SQL*Plus.
5. Load the database schema.
This assumes that the database host string is dbserver.company.com and user is defined as above. The SQL files referred to below are provided by support@ep.se .

```
sqlplus EPISERVER/PASSWORD@dbserver.company.com @EPiServerNET.sql > out.log
```

6. Verify that the out.log file does not indicate any errors.

Upgrading From Older Versions of EPiServer

The files distributed with the Oracle version contain an Upgrade folder. This folder contains several files to upgrade specific versions of the EPiServer database. Check the version number of your current EPiServer installation (see the title bar of Internet Explorer when in Admin or Edit mode) and run the files consecutively to upgrade the database step-by-step to the most current version.

Finally you should run the oracle_proc.sql script to update all procedures and functions.

Installation with Oracle Database Server

Note For offline installations, EPiServer Manager must also exist on the machine where EPiServer will be installed.

Follow the instructions below to install EPiServer with Oracle Database Server.

1. Start the installation and proceed through the installation screens until you reach the Database setup/creation dialog.

2. Select **Do not install database**. This will prevent any database installation to take place during installation, since the database has already been set up.
(default) in the **Port** field defines the database server's default port. If you wish to install to another database server port, change the value to the desired port number.

The screenshot shows the 'Install new site wizard' window for EPiServer Manager. The title bar reads 'Install new site wizard' and the application name is 'EPISERVER manager'. The main heading is 'Database setup/creation'. Below this, there is a note: 'The database should be an empty or already existing EPiServer database of correct version. If you create the user account manually you must add it to the role "Database Owner".' The form contains several sections: 'Server' with a dropdown set to '[local]' and a 'Port' field set to '[default]'; 'Database' with radio buttons for 'Existing Database' and 'New Database' (set to 'dbMyEPiServer'); 'User' with radio buttons for 'Existing user' and 'New User' (with fields for 'Password' and 'Confirm Password'); and a checked checkbox for 'Do not install database'. At the bottom, there are buttons for 'Exit', '< Previous', and 'Next >'.

3. After the installation has completed, you need to make the following modifications to the web.config file:
 - Change the database connection string. Data Source should correspond to the database host, User ID is the user and Password is the password.


```
<add key="EPsConnection" value="Data Source=dbserver.company.com;User Id=EPISERVER;Password=PASSWORD;" />
```

- Indicate that you are using the Oracle database driver by adding the following line to web.config

```
<add key="EPsDatabaseClient" value="Oracle" />
```

Deleting an EPiServer Installation

Follow the instructions below to delete an EPiServer installation.

1. Install EPiServer Manager according to the installation wizard.
2. Open EPiServer Manager. All existing EPiServer sites are displayed in the folder list. Right-click the site to be deleted and select **Delete**, or click  in the toolbar.
3. In the Remove Site Components window, select the parts of the installed site that you want to delete. The default setting is to delete all parts of the site. Clear the relevant check boxes if you do not want to delete the IIS data, database or file structure.

Note If you select to delete a database, the database user will be deleted unless the user is a member of other databases on the server.

4. Click **Delete** when you have selected the parts of the site that you want to delete.