

# APPENDIX B: INSTALLATION AND SETUP

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# APPENDIX B: INSTALLATION AND SETUP

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## A. Overview

### 1. *How do I install and setup ICMS?*

There are several steps in the initial installation and setup of **ICMS**. Look over the list of tasks below to get an idea of what you'll be doing. This appendix contains step-by-step directions for completing each of the tasks.

You should always refer to the installation instructions for the current version of ICMS. These instructions are for version 8.20.

**IMPORTANT: If you are currently using ICMS 8.16, you will simply upgrade your existing system to version 8.20. See Section I below to run the upgrade to version 8.20. Do not install ICMS separately (unless you are moving the program and your data to a new computer).**

Complete the tasks in order. Your **ICMS** program will then be ready for use as a complete museum collection management system. To install and setup **ICMS**:

- Gain a general understanding of **ICMS**.
- Assemble the items you'll need to complete the installation and setup.
- Install the program on your computer or server.
- Configure network connections if installing on a server.
- Configure file permissions on your computer or server.
- Install workstations on local machines for network installations.
- Create new directories for entering collections data. (See Section IV of Chapter 9 for creating new directories.)
- Add users to your system and establish their security rights. (See Section VI of Chapter 9 for adding users.)
- Create a NPS Unit or Unit record in the Names and Addresses associated module. (Refer to Section XII of Chapter 4.)

*You may call Re:discovery Software, Inc. for help at anytime before or during the installation process. Their main telephone number is 434-975-3256 or email [support@rediscov.com](mailto:support@rediscov.com). Refer to Appendix K: Support for more information about support.*

### 2. *Do I need special security rights to install ICMS?*

Yes. You must have administrator rights on your computer or server to install new programs. If you do not have administrator rights, contact your IT staff member for assistance.

### 3. *Installation Basics*

Your computer must meet the minimum hardware requirements defined in Appendix A. It needs enough free disk space to install the new version.

Most installations of **ICMS 8.20** will use Microsoft SQL Server 2008 R2 Express Edition as the database engine, provided on the **ICMS** disk. Large network installations will use SQL Server Standard Editions 2005\*, 2008 R2, 2012 or 2012 R2, either available via a service-wide license or purchased separately. If you will be using one of the SQL Server Standard Editions, you must install it first before installing **ICMS**. Installation of the **ICMS** program takes about 15-30 minutes. Follow the instructions in Section B below.

\* (SQL Server 2005 cannot be installed on Windows 8 or Windows 2012 Server.)

4. *How do I get a quick overview of ICMS?* Read the introduction to this manual. It will provide you with a general understanding of **ICMS** and may answer some of your preliminary questions.
5. *What do I do if I'm unsure that my system meets the requirements?* Make a list of all your system's components and configuration, as listed in Appendix A. You may need to ask the person who provides computer support at your unit to help you. Call Re:discovery Software, Inc. and tell them why you think your system might not meet the requirements. Have the list you made handy so you can answer the technical representative's questions regarding your system. The technical representative can tell you if you can load the program on your current system.

## B. Installing ICMS 8.20

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***These instructions are for an initial installation of ICMS 8.20 only. Do not use these instructions if you are currently using ICMS 8.16. See Section I below to upgrade your existing system to version 8.20. If you are moving the ICMS program to a new computer, see Chapter 9, Section III.***

**Note:** You must have administrator rights on your computer to install new software. If your login account does not have rights to install new software, please contact your IT staff member for assistance.

Please make sure that you read the System Requirements before installing the software and that the system complies with the minimum requirements.

**Special Note to Windows 2003 users:** If you plan to install ICMS on a Windows 2003 Server, there are some steps you need to complete prior to installation. Please look in the Documentation folder on your installation DVD or downloaded installation package for a document called "Windows 2003 Server Preinstallation Instructions.docx." You must follow these instructions before you install Proficio.

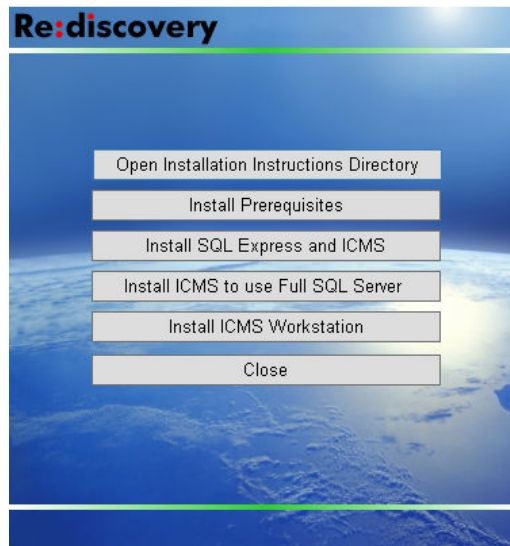
1. *How do I install ICMS 8.20?* Installing **ICMS 8.20** is a multi-step process depending on your setup choice. You will install the following programs from the installation CD:
  - Installing Prerequisites (required for all installations) (Section C)
  - Installing ICMS 8.20 (choose from the following options)
    - Option 1: Install SQL Express and ICMS (Section D)
    - Option 2: Install ICMS to use Full SQL Server (Section E)
  - Network Configuration for Network Installations (for Option 1 or Option 2) (Section F)

- Installing ICMS Workstations on local machines for network installations using Option 1 or Option 2 (Section G).

**Note:** A workstation will automatically be installed for both installation options on the main computer.

To begin:

Open Windows Explorer or My Computer to view the contents of the installation package. Right-click the Autorun.exe file, and choose Run as Administrator (even if you are logged onto the computer as an administrator). The installation menu will open:



2. *Which sections do I complete for installing on a standalone computer?*

To install on a standalone computer using the SQL Server Express, complete these sections below:

- C. Installing Prerequisites
- D. Installing SQL Server Express and ICMS  
(Installs: SQL Server Express, ICMS Server Components and a workstation)

**Note:** A workstation will automatically be installed for all installation options on the standalone machine or server.

3. *Which sections do I complete for installing on a network?*

To install on a network system, complete these sections below:

- C. Installing Prerequisites

Option 1:

- D. Installing SQL Server Express and ICMS  
(Installs: SQL Server Express, ICMS Server Components and a workstation)

**OR**

Option 2:

- E. Installing ICMS to use an existing instance of SQL Server  
(Installs: ICMS Server Components and a workstation)

- F. Network Configuration for Network Installations (required for both Option 1 or Option 2 – Sections D or E)
- G. Installing Workstations for Network Installations (required for both Option 1 or Option 2 – Sections D or E)

**Note:** A workstation will automatically be installed during the main ICMS installation for both options above. Follow the instructions in Section G to install workstations on local machines that will connect to the server installation.

- 4. *What is the difference between Option 1 and Option 2 for installing ICMS 8.20?*

**Option 1:** Use this option if you will be installing the program on a standalone machine or small network (2-5 concurrent users) and do not have SQL Server Standard Edition installed. This option includes the installation for SQL Server 2008 R2 Express Edition.

**Option 2:** Use this option to install the ICMS components to your already installed SQL Server instance for a large network setup (6+ concurrent users). If you use this option, you also **must** install the Workstation component in Section G for the client portion on the workstations.

**NPS Note:** If you do not have SQL Server Standard Edition already installed, the NPS has a service-wide license for SQL Server Standard Edition that you can install separately and prior to the installation of **ICMS 8.20**. SQL Server Standard Edition is available from the Regional IT Specialist. The download site requires a password for use.

- 5. *Which installation option should I use?*

If you do not have any staff members or computer support staff who are familiar with SQL Server and you will have less than 5 concurrent users of the program, install Option 1 – the SQL Server 2008 R2 Express Edition. This requires the least amount of setup.

If, however, you already have SQL Server Standard Edition or higher installed and/or you have computer support staff who can use and configure SQL server, install Option 2 – existing SQL Server Components Installation. This installation is recommended for units who have large networks or 6+ concurrent users of the program.

## C. Installing Prerequisites

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- 1. *How do I install the prerequisites for ICMS 8.20?*

The ICMS Prerequisites are required for all installations (standalone, server and workstation). Follow these steps to install the prerequisites:

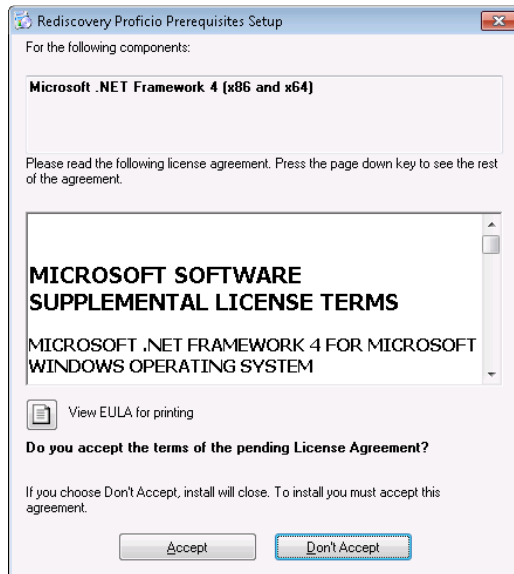
- On the installation menu, click the **Install Prerequisites** button.

**Note:** If your system does not have the current versions of Internet Explorer, MDAC, Windows Installer, or Windows Script, you will have to install these separately. These are available in the Proficio Prerequisites folder in the installation package in the IE6SP1, MDAC28, DotNetFX40, WindowsInstaller4\_5, and Wscript subfolders, respectively. The installation will indicate if you need to install one of these before you can continue. Open the necessary folder and run the application file inside it to install these components. You may need to reboot your computer after installing these. After rebooting, start the installation again and proceed with the instructions to install the prerequisites for ICMS.

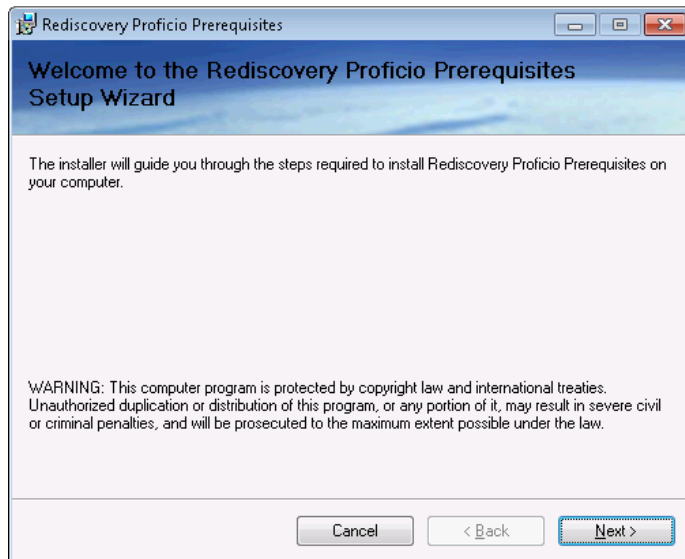
- Follow the on-screen instructions.

**Note:** One of the prerequisites being installed is Microsoft .Net framework 4.0. If Microsoft .Net Framework 4.0 is not installed on your machine already, the following screens will appear. If it is installed already, you will begin with the Prerequisites Installation screen instead (see below).

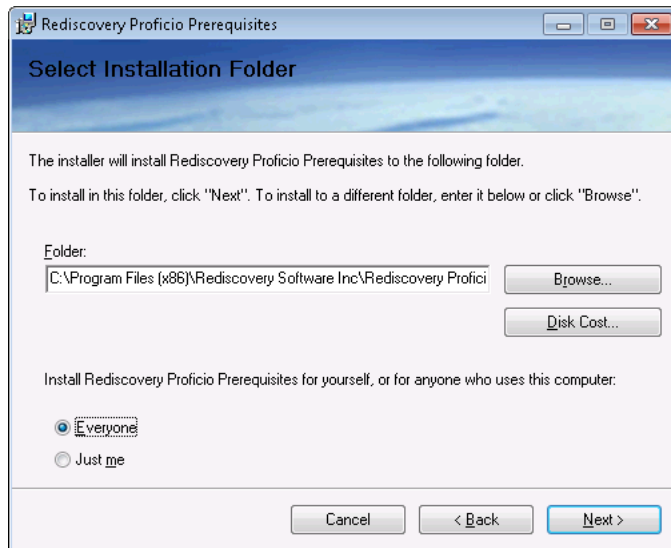
Note for Vista users: If the .NET Framework 4 will not install on your Windows Vista computer, then that specific computer is not compatible with ICMS.



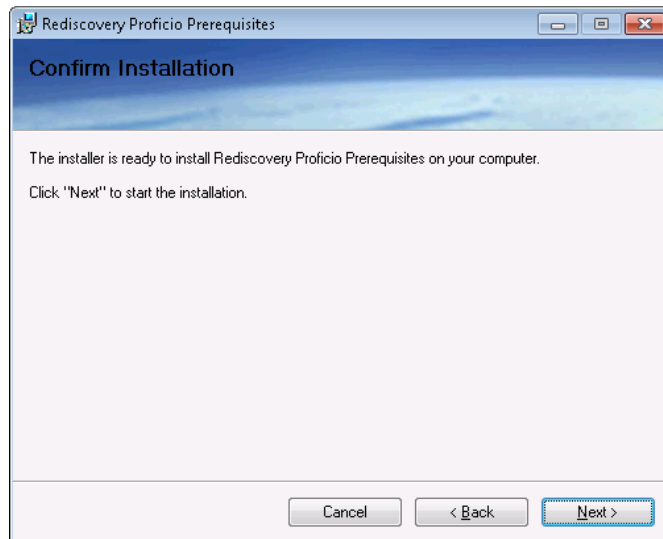
- Click Accept on the license agreement to install the .NET Framework 4.0. The .Net Framework will install. Please be patient while the installation proceeds (this step may take a while)



- Click Next to install the prerequisites.

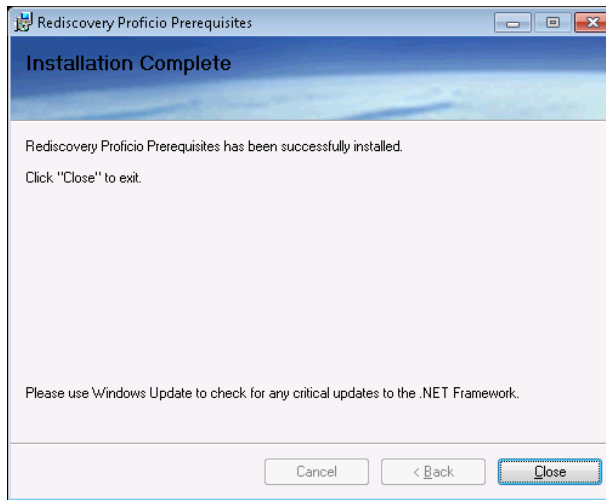


- Accept the default folder location or enter a new location where you want the program installed. Edit the path as needed leaving the folder structure as is from \Rediscovery Software Inc\ on down. Example: D:\Apps\Rediscovery Software Inc\Rediscovery Proficio Prerequisites\. Select Everyone and click Next.

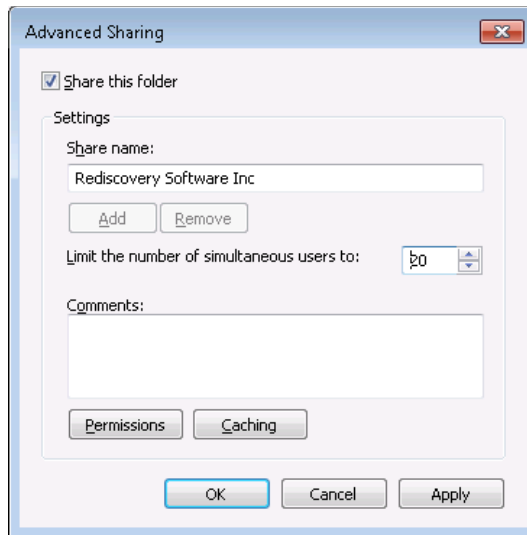


- Click Next to confirm and start the installation of the prerequisites. You will see a progress window while the installation is working.





- When the installation is complete, click Close.
2. *What should I do next to prepare the server for the next step of the ICMS 8.20 installation?*
- If you plan to have ICMS accessible over the network from other workstations, you need to set up the share on your server now for workstations to access the program.
3. *How do I create a share on the server to access the program across the network?*
- After installing the Prerequisites above, from the “server” computer where the entire program is to be installed:
- Go into Windows Explorer and navigate to the drive that networked users will be accessing. It might be an entire drive like the c:\ drive or the d:\ drive. It may also be a shared folder such as Apps or the Rediscovery Software Inc folder. **Note:** you **cannot** use a secure share (e.g., share name = c\$) for users to access ICMS.
  - If the folder that is to be shared is not there already, create it and then right-click on it and select Properties. (We generally recommend sharing the Rediscovery Software Inc folder that should be present now that the prerequisites are installed, but any other folder above that can also be shared instead.)
  - On the Sharing tab, select Advanced Sharing



- Check “Share this folder”
- enter a Share Name (the default folder name is ok)
- set the User Limit to Maximum Allowed or enter the maximum number your network protocols allow

**Do not close this window yet; proceed to the next step below for setting the share permissions.**

4. *How do I configure the share permissions and security on the shared folder on the server?*

Click the Permissions button in the Advanced Sharing window. The easiest scenario is to add Everyone with Full Control. If you cannot have everyone with Full Control, then you need to add the following accounts or groups with at least Read and Change rights or Full Control:

- SYSTEM (requires Full Control)
  - If SQL Server is installed on the same computer as Proficio, also add the SQL Server account with Full Control which will be called: SQLServer2008MSSQLUser\$*ServerName*\$Proficio or the appropriate user name for your SQL installation.  
**Note:** For the Option 1 installation, this user account will not exist until after the installation of SQL Express in Section D below. You can add this account to the share after the installation.
  - Each individual network user, or group with all ICMS users, for users that plan to use ICMS. If these users are also in the default Users group, the Users group needs Read and Change rights as well. [In Windows, if a network account is considered part of more than 1 group in the list, Windows will use the more restrictive rights.]
- Click Apply and OK on the Permissions window and then the Advanced Sharing window.
  - Back on the Properties window, select the Security tab. Click Edit to add the following Groups or user names with Full Control to all subfolders and files:
    - SYSTEM
    - If SQL Server is installed on the same computer as ICMS, also add the SQL Server account (like above) with Full Control.

- Each individual network user, or a group with all ICMS users, for users that plan to use ICMS. If these users are also in the default Users group, the Users group needs Read and Change rights as well. [In Windows, if a network account is considered part of more than 1 group in the list, Windows will use the more restrictive rights.]
- Click OK to close the Properties window.

#### D. Installing SQL Server Express and ICMS (Option 1)

##### 1. *What is the Option 1 installation for ICMS?*

Use Option 1 to install the program on a single computer or small network (2-5 concurrent users) and if you do not have an existing installation of SQL Server. This will install **ICMS** server components along with SQL Server 2008 R2 Express Edition and a workstation.

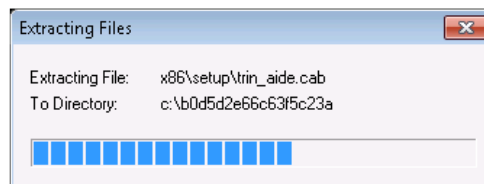
**Note:** For large network installations (6+ concurrent users), we recommend that you use Option 2 and SQL Server Standard Edition instead.

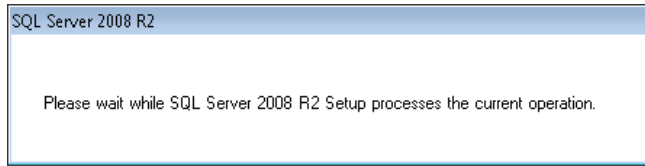
##### 2. *How do I install SQL Server Express and ICMS -- Option 1?*

To install Option 1 – the SQL Server Express and ICMS installation, follow these steps:

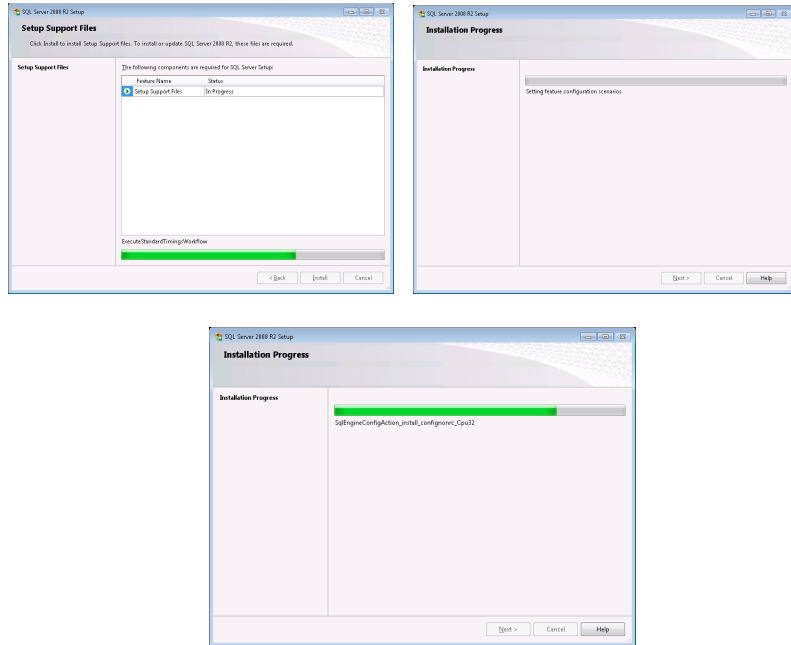
- First, make sure that you have installed the prerequisites in section C above.
- On the installation menu, click the **Install SQL Express and ICMS** button.
- Wait while the installation extracts the files needed and then proceeds to install SQL Server Express 2008 R2. You will see the installation cycle through several screens as it installs all of the necessary SQL components and creates a named SQL instance. **Please be patient; this may take several minutes to complete and there may be some pauses between some of the screens. The installation has not stopped. If possible, move your mouse periodically to prevent any screen savers from activating or your monitor from hibernating.** You will see the following screens as it proceeds.

Note for Windows 8/8.1 and Server 2012: You may get a prompt to download and install .NET Framework 3.5 which is not always preinstalled on these operating systems. If so, follow the on-screen instructions to download and install this Microsoft component. When it is finished, Click OK and the installation will proceed with the next step.





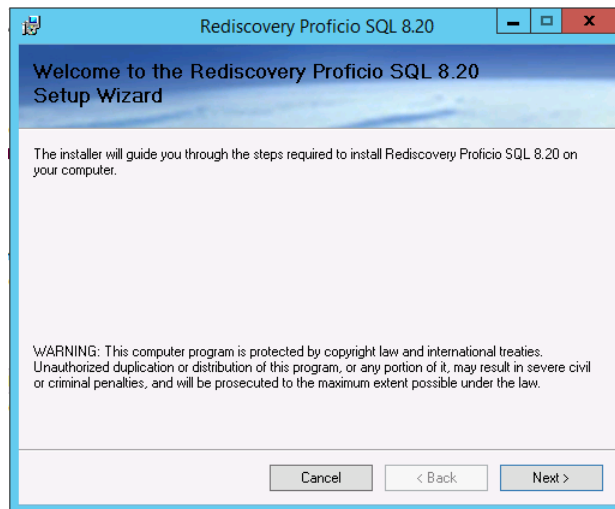
### SQL Server Express Installation



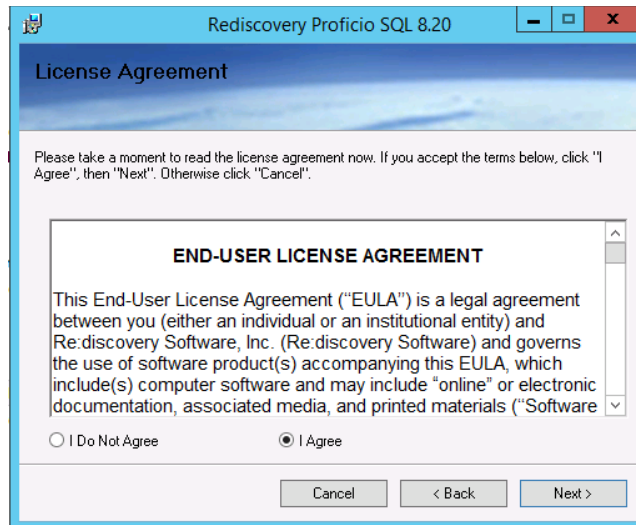
When SQL Server Express is finished installing, ICMS's Server Components will install next.

### ICMS Installation

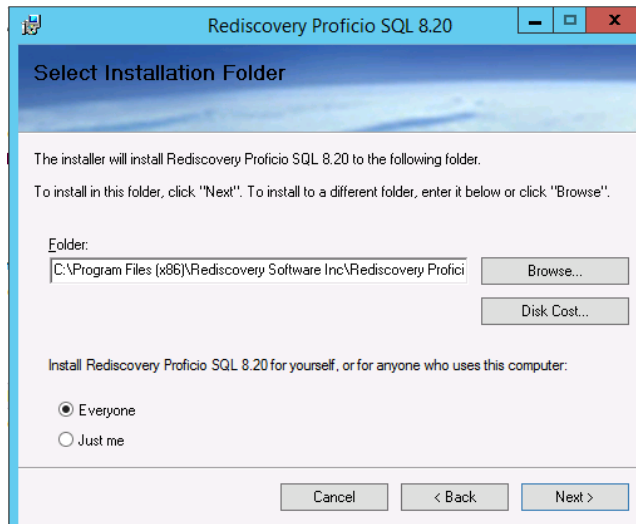
- The “Welcome” window opens for Rediscovery Proficio SQL (ICMS) 8.20 setup automatically after the SQL Server 2008 R2 Express installation finishes.



- Click Next to continue.



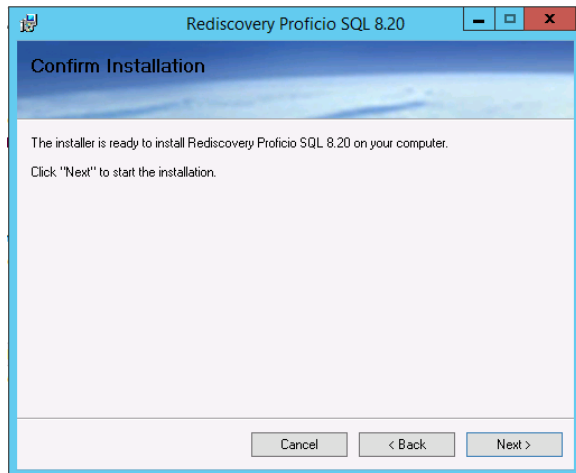
- Review the End-User License Agreement. Select “I Agree” and click Next.



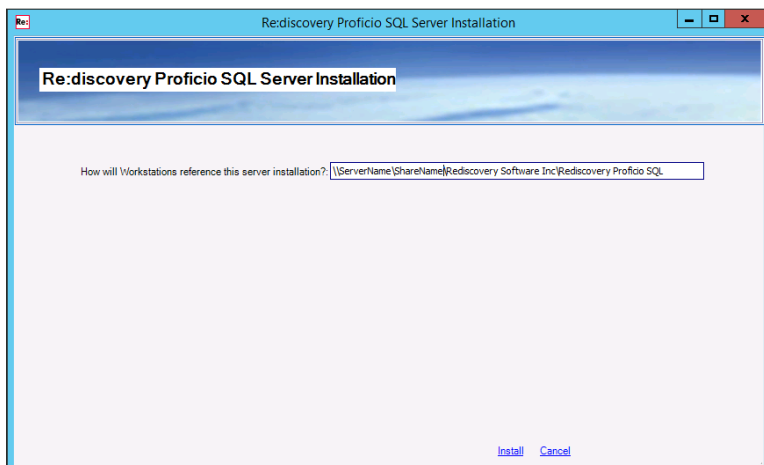
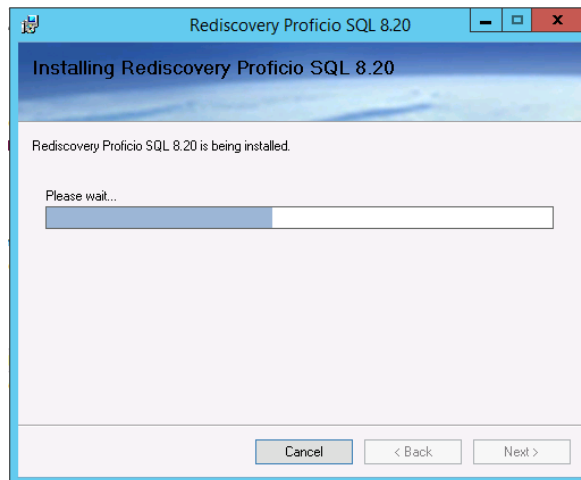
- ICMS will install to the C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL\ folder.

If you wish to install the application to an alternate location just as you did for the prerequisites, edit the path as needed leaving the folder structure as is from \Rediscovery Software Inc\ on down. Example: D:\Apps\Rediscovery Software Inc\Rediscovery Proficio SQL\ (**Note:** You will use this same path when installing the workstation below.)

- Select “Everyone” and click Next.



- Click Next to start the installation. You will see an installation screen showing the installation progress.



- Provide the path that workstations will use to reference this installation. A “workstation” is the end-user interface for accessing ICMS, whether on a standalone, shared computer, or network server installation. Edit this path to match your setup as follows:

**For standalone installations:** Change this path to:  
**C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL\**  
or the path you indicated above for where to install ICMS.

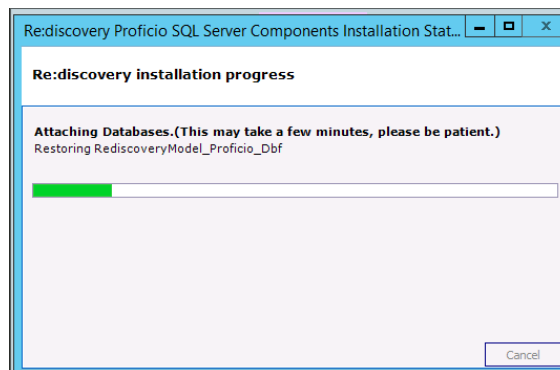
**For shared computer or server installations:** Make sure that you established the share on the folder where the program is installed in Section C.3 above or do so now. The installation will fill in the network path to the system using the computer name to indicate how client workstations will refer to the installation directory. Edit this to match how you set up the share above. Leave the folder structure as is from \Rediscovery Software Inc\ on down. (A UNC path refers to the server name rather than a drive letter and includes the share name). For example:

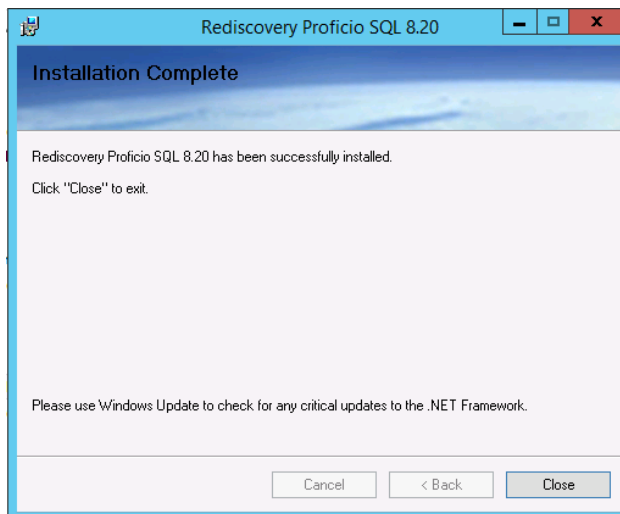
If you shared the Rediscovery Software Inc folder:  
**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL\**

If you shared a folder above Rediscovery Software Inc:  
**\\ServerName\sharename\Rediscovery Software Inc\Rediscovery Proficio SQL\**

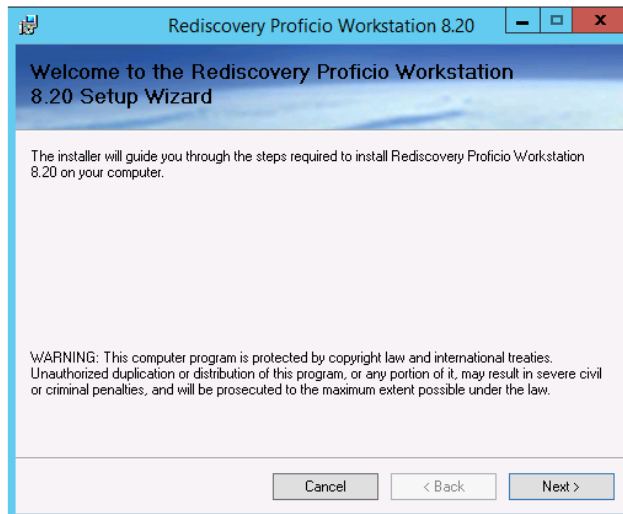
After filling in the path, click Install.

- Please be patient while the ICMS Server Components install. This process can take 3-10 minutes depending on the speed of your computer and may appear to stop. Please be patient and it will complete.



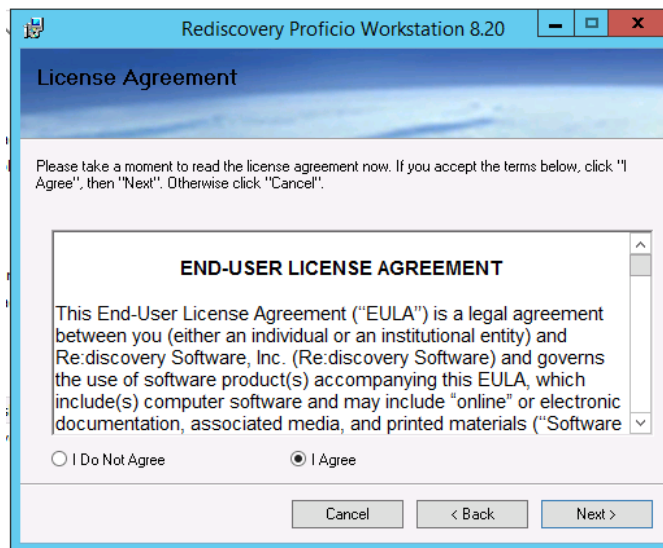


- When the installation is complete, click Close.
- The “Welcome” window for the Workstation setup will open next. A “workstation” is the end-user interface for accessing ICMS, whether on a standalone, shared computer, or network server installation and is required to run the program.

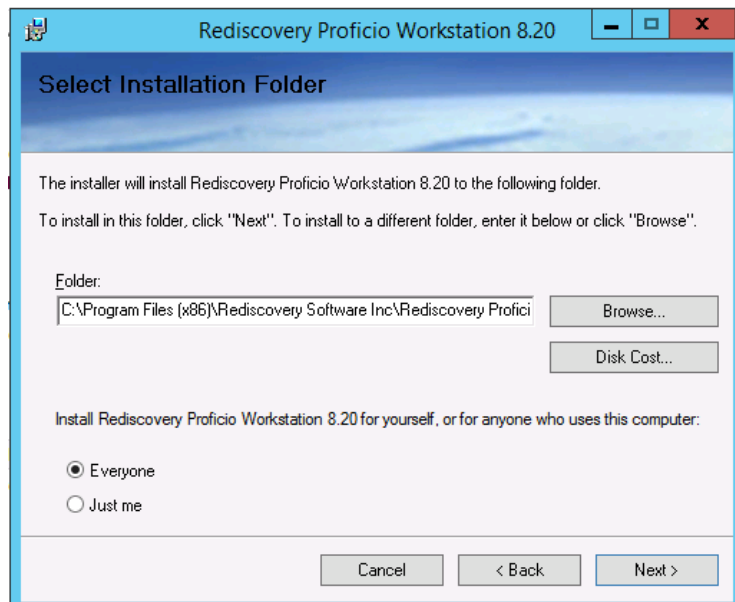


- Click Next to continue.

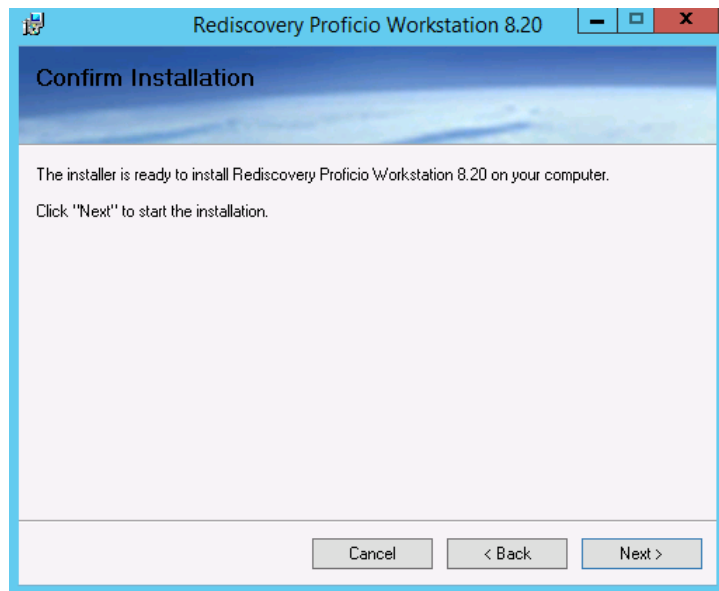




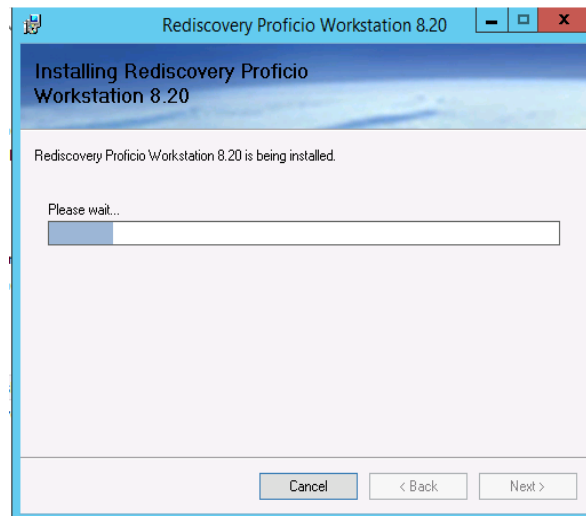
- Review the End-User license Agreement. Select “I Agree” and click Next.



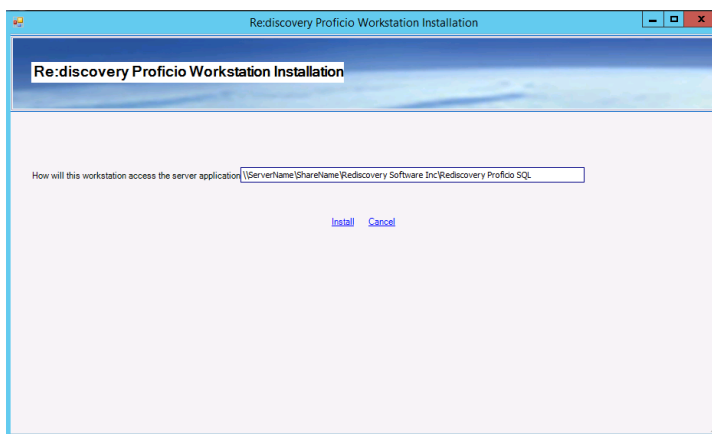
- The workstation component will install to the folder C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio Workstation. If you are installing the program to an alternate location on this computer, use the same root path here as you did when installing the main ICMS components above (page B:11), leaving the remaining folder structure as \Rediscovery Software Inc\Rediscovery Proficio Workstation\. Select “Everyone,” then click Next.



- To confirm the installation, click Next.



- The installation will proceed.
- In the next window, indicate the path for “How will this workstation access the server application?”. Enter the same path you used on page B:12 above.



**For standalone installations:**

**C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL**

or the path you used on page B:12 above.

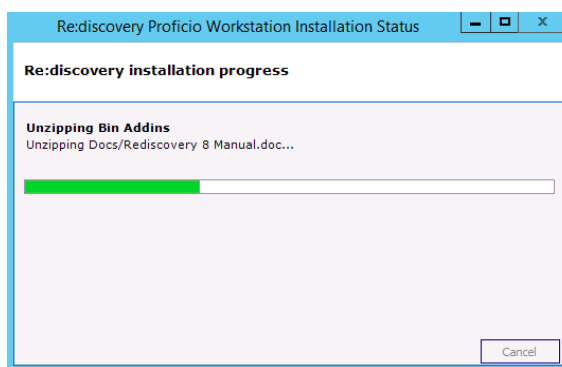
**For server installations:** use the UNC path you entered on page B:12 above. For example:

**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL\**

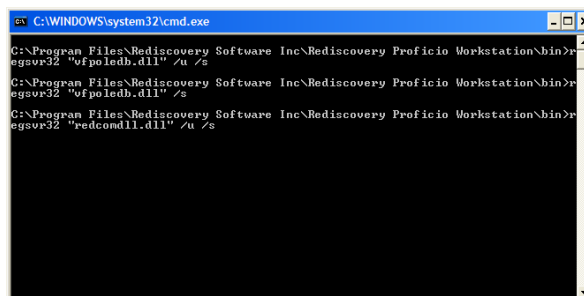
**or**

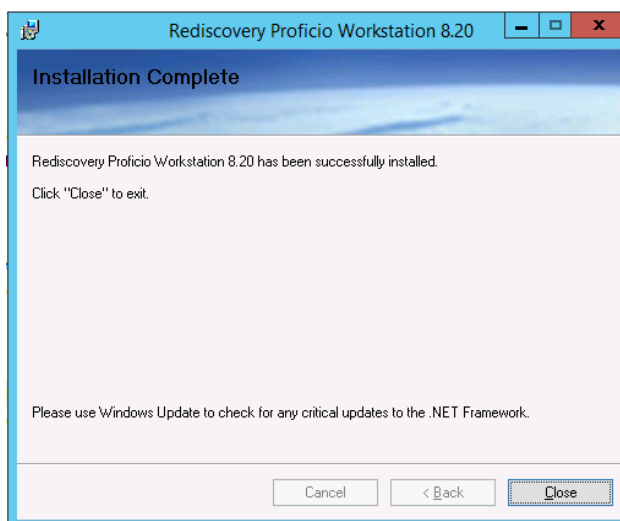
**\\ServerName\sharename\Rediscovery Software inc\Rediscovery Proficio SQL\**

- Click Install.
- Please wait while the Workstation installs. This may take 3-5 minutes to complete, depending on the speed of your computer. Be patient and it will complete.



- A DOS window will appear briefly just before completion.





- When the installation is complete, click Close.
- Your installation is complete. Click Close on the installation menu.

Proceed immediately to number 3 below to set up file permissions.

3. *What File Permissions must be established on the program folder?*

You must now set File Permissions through Windows Explorer. The three basic ICMS user profiles that will need certain permissions established to run the program are:

- Public Search – users with only Public Search or Researcher rights for read-only access to the data.
- Data Entry – general users with Data Entry rights, without access to the administrative functions within Re:discovery.
- ICMS Administrator – power users with full access to all functions including creating new directories and backup functions.

The following chart lists the folder and subfolders with the permissions required depending on the user's or group's security profile within the program. These folders are located in C:\Program Files (x86)\Rediscovery Software Inc\ or the location you entered on page B:11 above.

Folder name	Permissions by User Type		
	Public Search	Data Entry	ICMS Administrator**
Rediscovery Proficio SQL			Full
Bin	R	R	Full
Data		R	Full
Dictionaries	R	R	Full
Docs		R	Full
FullImages	R	RM	Full
Media	R	RM	Full
Query Express		R	Full
SetRediscoveryAccess		R	Full
Sweep		R	Full
Thumbnails		RM	Full
Updater		RM	Full
Upgrade		R	Full
VisualRediscovery		RM	Full

WorkstationInstall			Full
Connection.config file	R	R	Full
Rediscovery Proficio Workstation	R	RM	Full
Bin	R	RM	Full
Dictionaries	R	R	Full
Docs	R	R	Full
Query Express		R	Full
Synchronizer	R	Full	Full
Updater (if present)		RM	Full
Upgrade		R	Full
VisualRediscovery	R	RM	Full

R = Read & Execute + List Folder Contents + Read, M = Modify + Write, Full = Full Control

\*\* ICMS Administrators require full permissions on the Rediscovery Proficio SQL folder to create and delete subfolders when they create new directories and perform data backups or transfers to disk.

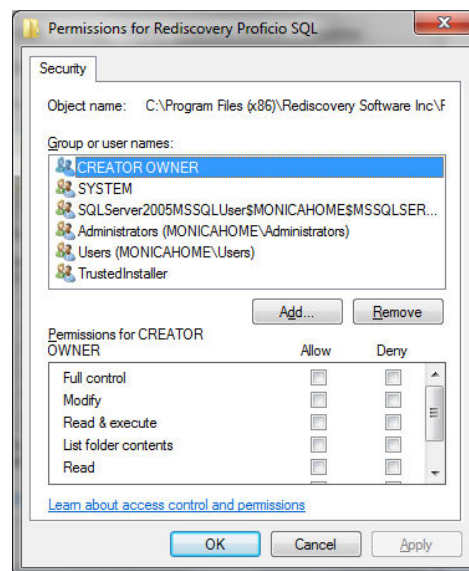
#### 4. How do I set up file permissions?

To set up file permissions:

- Open Windows Explorer and navigate to the C:\program files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL folder.

**Note:** To save time, you may wish to apply these permissions to the main \Rediscovery Software Inc folder instead of the separate folders under that.

- Right click on the folder and choose Sharing and Security.
- Select the Security tab and click Edit.



- You can either add different groups to the list if you have users separated into groups, or select the Users group from the list.
- Use the chart above to define Permissions for each user profile. If you are only using the Users group, you should check the Modify permission (Write will automatically be selected with this). Read & Execute, List

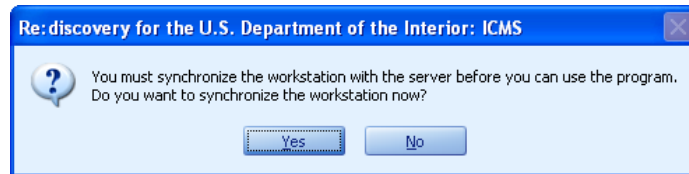
Folder Contents, and Read are usually automatically selected when a new program is installed. You can apply these permissions to the entire Rediscovery Proficio SQL folder, or, if you prefer, select the individual subfolders and apply permissions as shown in the chart above.

- Click Apply, then OK to save the File Permissions.
- Follow these same steps on the C:\program files (x86)\Rediscovery Software Inc\Rediscovery Proficio Workstation folder.

**If you are installing Proficio on a stand-alone computer, you are finished!**

Your computer's desktop will have a new shortcut for "Rediscovery ICMS." The same option will also be found from the Windows Start button, under All Programs. Start the program to test the installation. The default login is the User ID **red** and the password **red**. This is an Administrator level login.

**Note:** The first time you start the workstation, right-click on the shortcut and select Run as Administrator for Windows 7, 8, 2008 R2, 2012, and 2012 R2. It may need to synchronize which requires this admin role.



***If this is an installation for a small network (even if only 1 additional workstation will connect to this installation), proceed to Section F for the network configuration and Section G to install additional client workstations.***

## E. Installing ICMS to Use an Existing Instance of SQL Server (Option 2)

### 1. *What is the Option 2 installation for ICMS?*

This option is for use with SQL Server Standard Edition versions 2005, 2008, 2008 R2, 2012, or 2012 R2 that is already installed. These versions of SQL are not provided on the installation disk. Your bureau may already have a license and/or preferred version of SQL Server you can use. Contact your bureau or regional IT specialist. (Note: SQL Server 2005 cannot be installed on Windows 8 or Windows 2012 Server.)

You must first install your preferred version of SQL Server Standard Edition using the instructions provided with the software. To install a new instance, you must use the SQL installation package as well. When installing SQL Server, you must leave the *default* entry for the collation for the Database Engine as `SQL_Latin1_General_CP1_CI_AS`. Then follow these configuration instructions for the security login prior to installing the ICMS components.

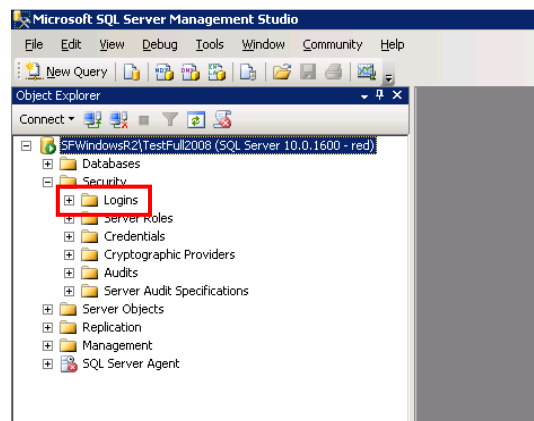
**Note:** You may install ICMS's server components on the same server as SQL Server. Or you may install ICMS in a 3-tier environment where ICMS's server components are installed on a server that is separate from the server hosting SQL Server where your databases are located. During the installation of ICMS, you will tell the installer where you want the SQL Databases to be located and the installer will create the initial databases used by ICMS. During regular usage, when users create or delete directories in the application, ICMS will create or remove additional databases in SQL Server in that same location.

### 2. *What do I need to do to configure my SQL Server installation before installing ICMS?*

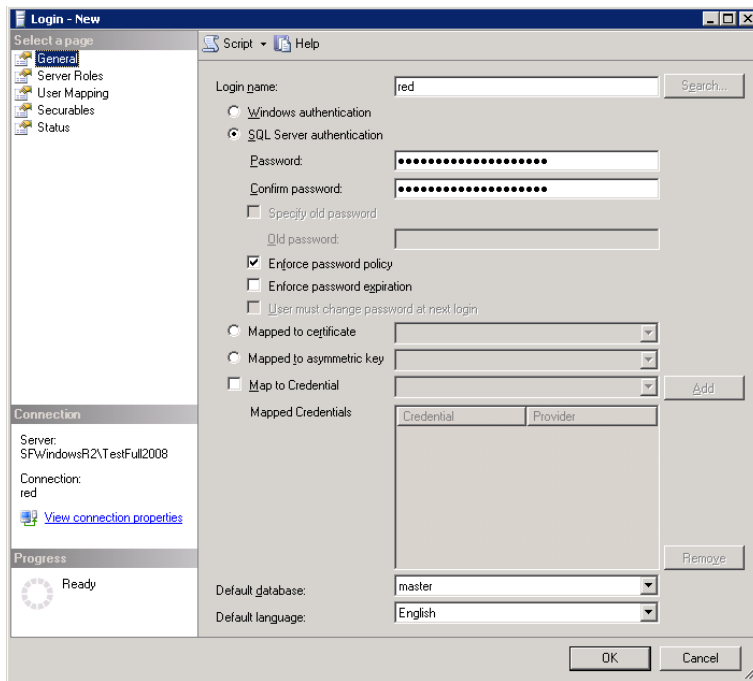
You must configure your existing SQL Server instance login and authentication mode before you can install ICMS. Follow these steps to configure the login and authentication mode:

- Open the SQL Server Management Studio window and select the Database Engine you will be using.

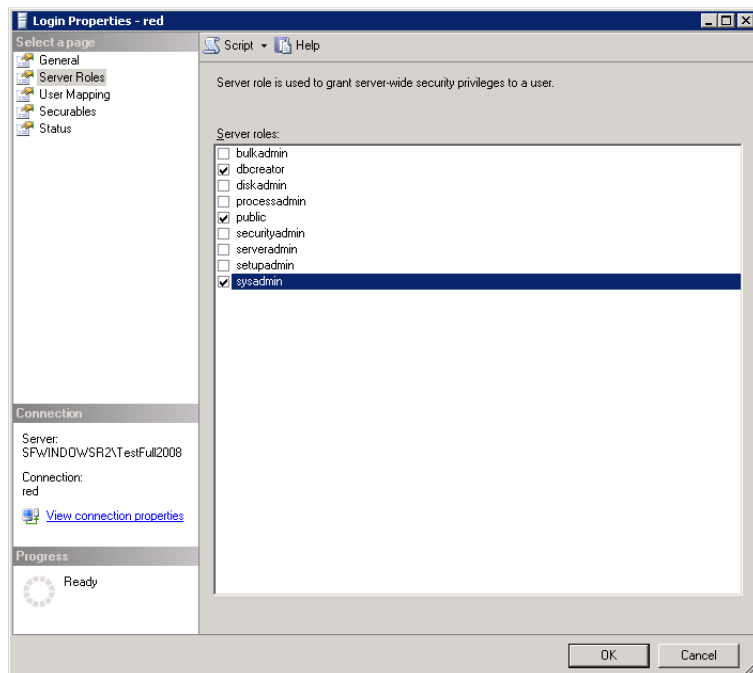
## Logins



- Under Security on the left, right click on Logins and select New Login. (Or you can use an existing login, if desired, as long as it is configured as follows.)



- Enter a Login name, you can use 'red' or other login name.
- Select SQL Server authentication. Enter a password and confirm the password.
- Select "Enforce password policy" and deselect "Enforce password expiration".
- Choose "master" for the Default Database.
- Default language should be English (or you can leave it as <default>).
- While still in the Login properties, select Server Roles for this login under 'Select a page' in the upper left.





- For Server Roles, check the following: **dbcreator**, and **sysadmin** as shown above. (Public will likely already be selected.)

**Note:** After the software is completely installed, you may go back and remove the dbcreator and sysadmin roles. When a user uses features in the program like create a new directory, load to an empty directory, load data via Software Updates, or transfer data to/from disk; the program will use the SQL Admin Login if it exists (see below for details) or prompt them to enter the log in and password for a SQL account that has rights to do these tasks in SQL. Every time you apply a software update in ICMS or restore a complete system backup, you must first temporarily re-activate the SQL user to have sysadmin rights.

This scenario is optional for networks with very high security. Most installations will leave these Server Roles for the SQL Login as described above.

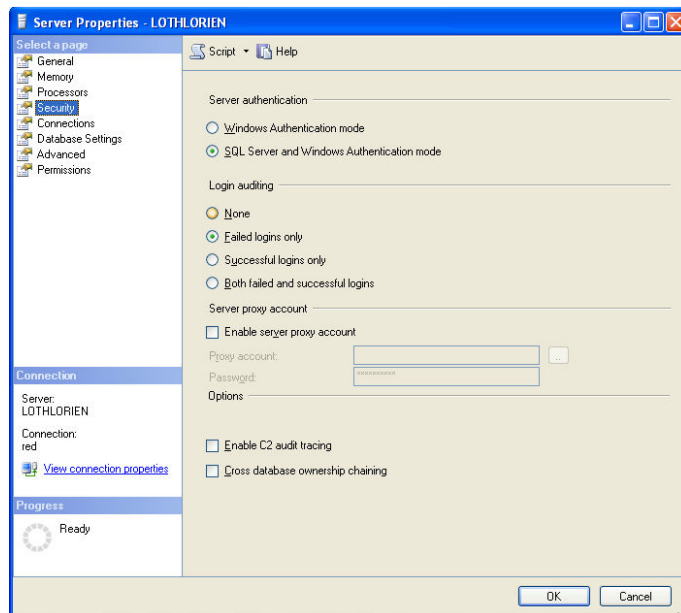
**Note:** Please make a note of the login and password you will be using as well as the name of the SQL Server instance. You will need this information when installing the ICMS components.

- Click OK to save the login.

### Authentication Mode

Set your SQL instance to use both SQL and Windows authentication (if you did not do so during installation of SQL server):

- In the SQL Management Studio, right click on the Server\instance name in the left navigation pane and choose Properties.
- In the Properties window, choose Security under Select a page in the left pane.
- Under Server Authentication, make sure that “SQL Server and Windows Authentication mode” is selected.

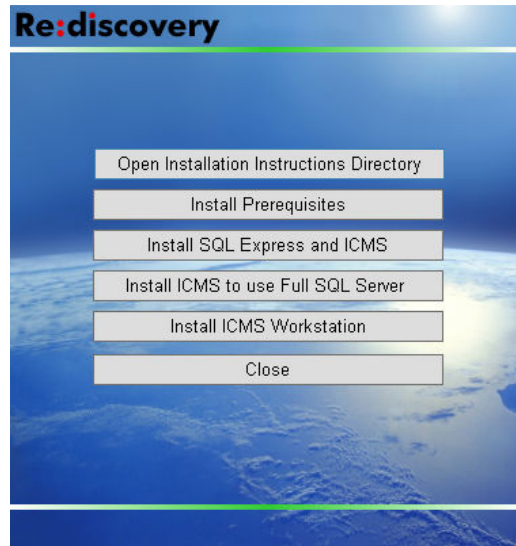


- Click OK to save any changes.

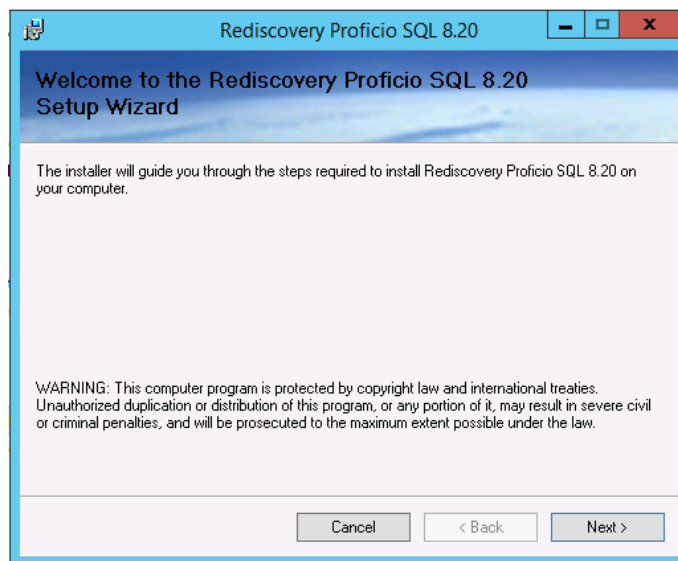
3. *How do I install ICMS SQL Server components for use with an existing SQL Server?*

To install Option 2 – the ICMS SQL Server Components to use with an existing SQL Server and an ICMS workstation, follow these steps:

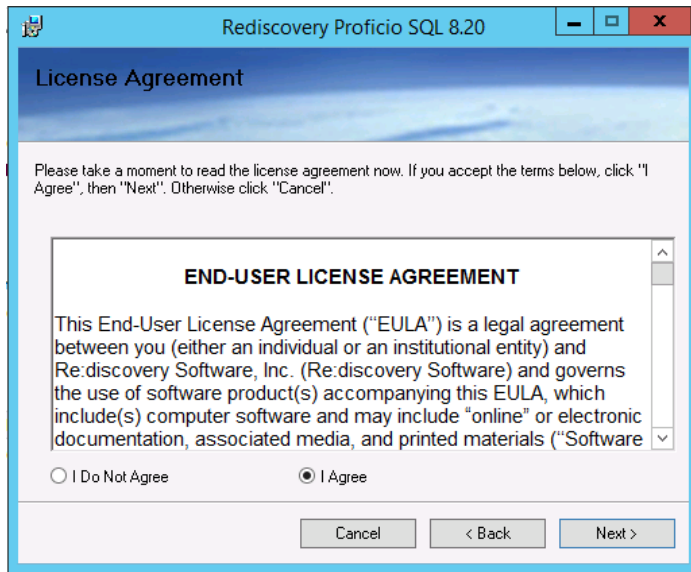
- First, make sure that you have installed the prerequisites in section C above and set up the sharing and security on the server as instructed in that section.
- On the installation menu, click the **Install ICMS to use Full SQL Server** button.



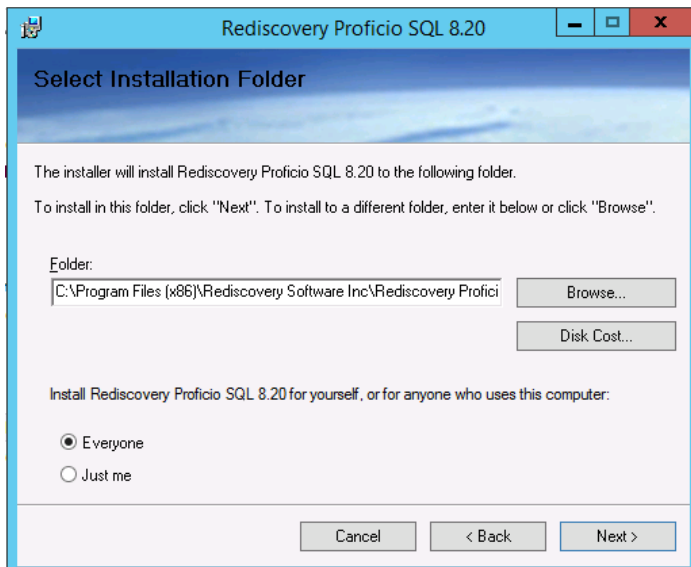
- Follow the instructions in the Rediscovery Proficio SQL setup wizard.



- Click Next to begin.

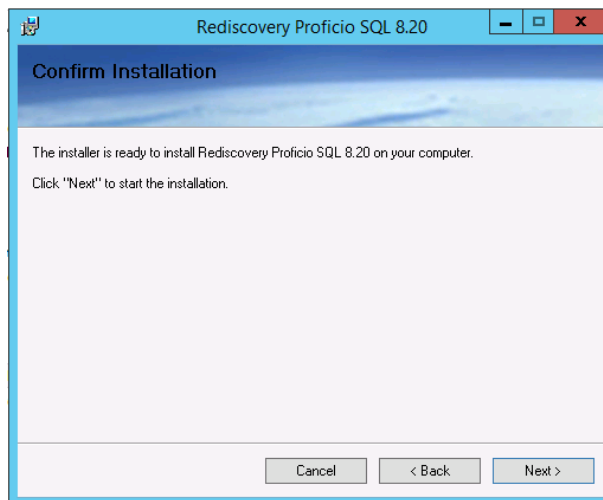


- Review the End-User License Agreement (EULA). Select “I Agree” and click Next.

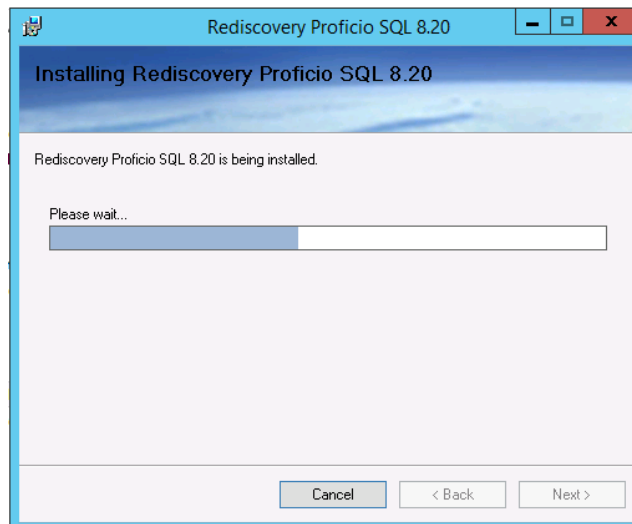


- To install to the default location as shown, select Everyone, and click Next.

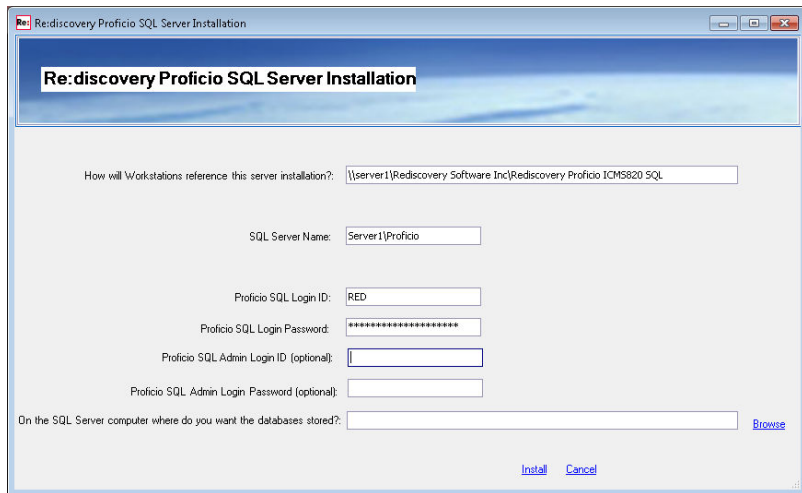
If you wish to install the application to an alternate location just as you did for the prerequisites, edit the path as needed leaving the folder structure as is from \Rediscovery Software Inc\ on down. Example:  
D:\Apps\Rediscovery Software Inc\Rediscovery Proficio SQL\



- Click Next to confirm the installation.
- You'll see the installation proceed.



- You now need to provide the installation some information.



1. How will workstations reference this server installation?: The installation will fill in the network path to the system using the computer name to indicate how client workstations will refer to the installation directory. You must establish a shared folder on the server for workstations to access. (See C.2 above on how to share a folder.)

If you shared the Rediscovery Software Inc folder:

**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL\**

If you shared a folder above Rediscovery Software Inc:

**\\ServerName\sharename\Rediscovery Software Inc\Rediscovery Proficio SQL\**

(Do not change the folder names after the share name.)

**Note:** If this is a standalone installation, change this path to C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL\ or the drive path you indicated on page B:23 above.

2. SQL Server Name: You must provide your SQL Server Name. By default the installer will fill in the computer name where you are running the installation and a named instance called Proficio. You must use the existing instance of SQL Server that you previously configured on this computer or another computer on your network. If your SQL instance has a different name or is located on a different server, edit this as necessary. Enter it as ServerName\InstanceName. If you are using a default instance of SQL, enter just the server name.

The installation will create 3 databases as part of the installation and new databases get created/deleted when users create/delete directories in Proficio.

3. Proficio SQL Login ID and Proficio SQL Login Password: **Do not use the automatic entries in these fields.** Enter the SQL Server Login ID and Password you created for this SQL Server instance in SQL Server Management Studio. This SQL Account needs to have dbcreator, public, and sysadmin rights to perform the installation

and create the databases. After implementation is complete, you may remove all but public rights from the SQL account. This account will be used by ICMS to interact with and query the databases.

4. Proficio SQL Admin Login ID (optional): If you decide to remove the dbcreator and sysadmin rights from the SQL account you used during installation, you may store an optional SQL user with higher rights (dbcreator and sysadmin). When a user performs an operation in the software requiring these rights, ICMS will use this administrative level SQL account rather than the one used for regular interaction with SQL (such as performing queries). You must create this optional administrative SQL account in SQL Server Management Studio and give it dbcreator and sysadmin Server Roles.

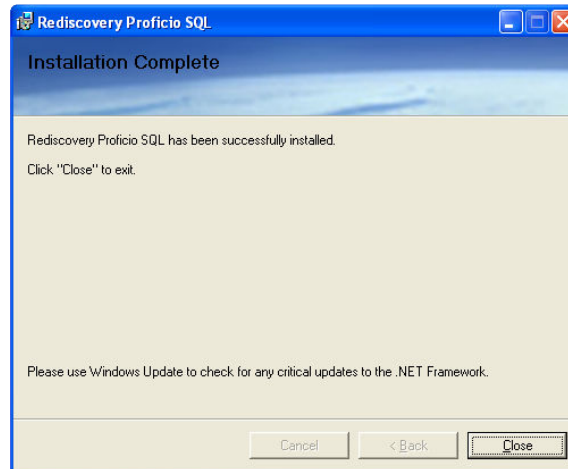
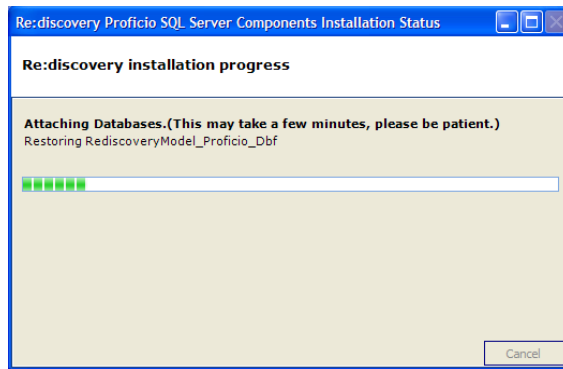
This optional setting is for networks with very high security. Most users will leave this blank.

5. Proficio SQL Admin Login Password (optional): The password for the SQL Admin Login ID. This optional setting is for networks with very high security. Most users will leave this blank.
6. On the SQL Server computer where do you want the databases stored? This is the location on the SQL Server computer, *from that computer's perspective*, where you want the ICMS databases stored. You can use the Browse link to navigate the folder structure on the SQL Server computer to select the folder where you want to store your databases. If you use the Browse link, it will first check to see if the SQL connection information in SQL Server Name, SQL Login ID, and SQL Login Password are valid. If you want to have the databases stored in the default Data folder within ICMS's folder structure, leave this field blank. Most users will leave this blank.

- After filling in these fields, click the Install link.
- The installation will attempt to verify the information you entered before proceeding:
  - It will attempt to connect to SQL. If you enter invalid information in the SQL Server Name, SQL Login ID, or SQL Login Password; you will get a message that it could not connect to SQL based on the information you provided.
  - It will attempt to verify the path on the SQL Server computer for where you want to store the database files. You will get a message if the path is invalid.
  - It will attempt to verify the path for how workstations will reference the server installation. You will get a message if the path is invalid.

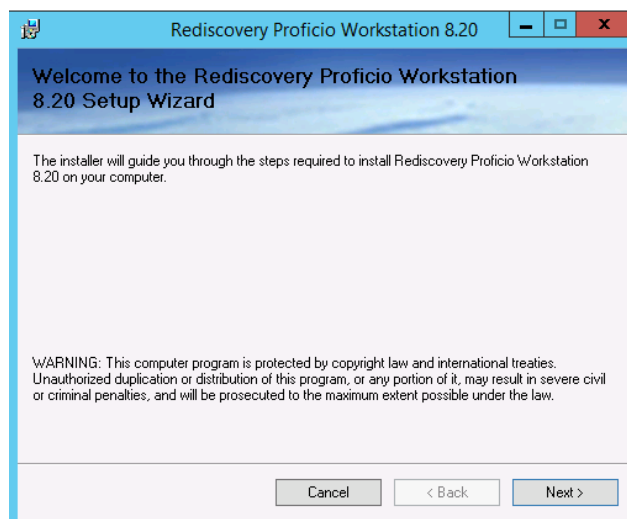
If you get any of these messages, correct those fields and click the Install link again.

- Please wait while ICMS SQL Server Components install. This may take 2-10 minutes to complete depending on the speed of your computer and may appear to stop. Please be patient and it will complete.



- Once the installation is complete, click Close.
- The installation will proceed by installing a **Workstation**.

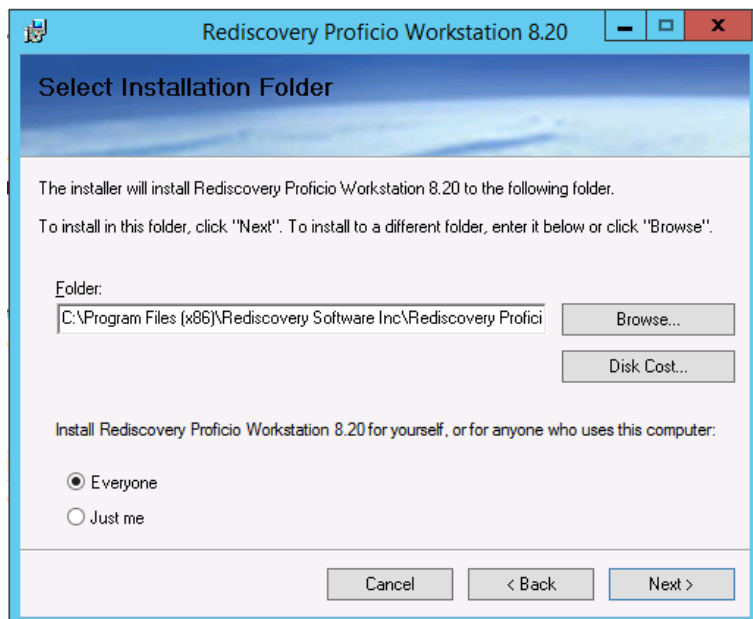
**Note:** You will use the Install ICMS Workstation 8.20 instructions for installing workstations on individual computers that will access the program on this server over the network. See Section G below.



- Click Next to continue.

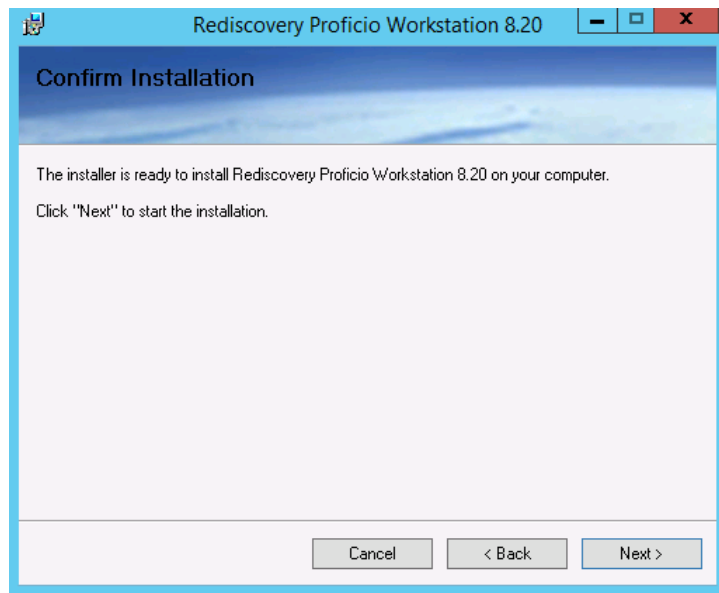


- Review the End-User license Agreement. Select “I Agree” and click Next.

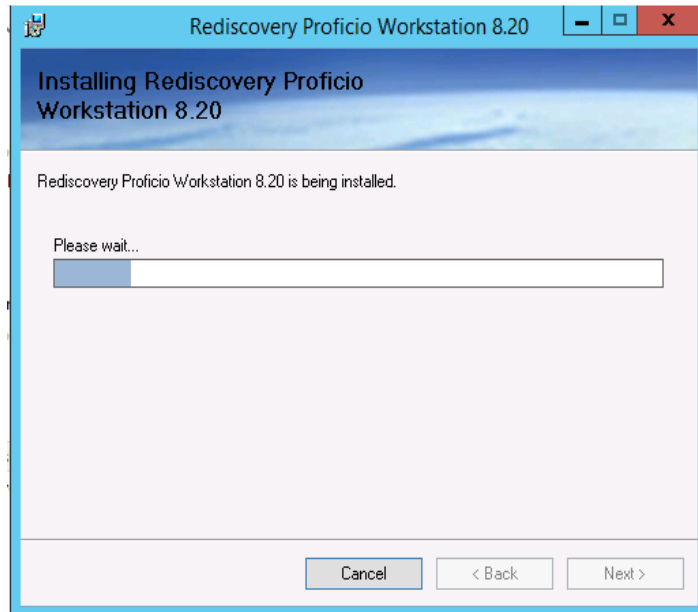


- The workstation component will install to the folder C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio Workstation. If you are installing the program to an alternate location on this computer, use the same root path here as you did when installing the main ICMS components above (page B:24), leaving the remaining folder structure as \Rediscovery Software Inc\Rediscovery Proficio Workstation\. Select “Everyone,” then click Next.

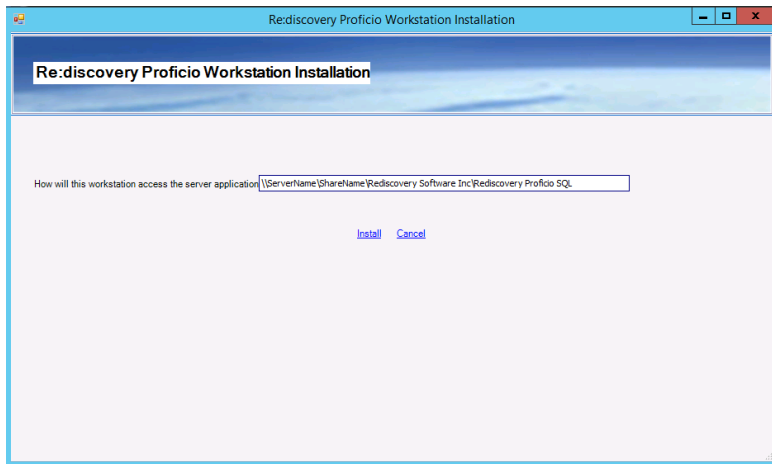




- To confirm the installation, click Next.



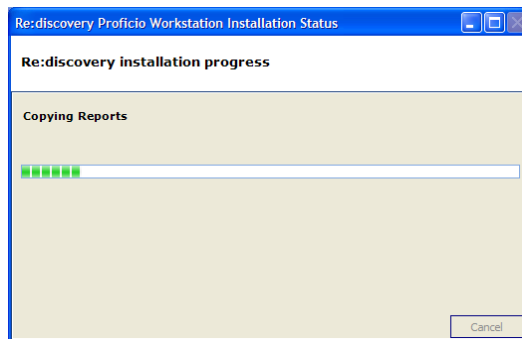
- The installation will proceed.
- In the next window, edit the path for how this workstation accesses the server application. Enter the same path you used on the first line on page B:26 above when indicating how the workstation will reference the server installation.



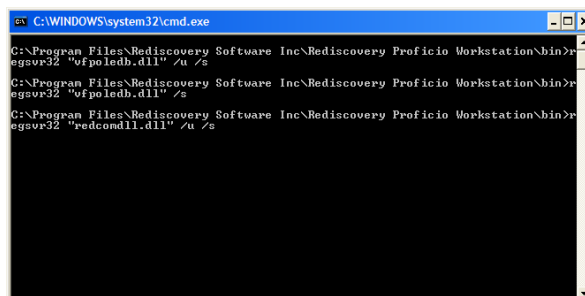
**For server installations:** use the UNC path you entered on page B:26 above. For example:  
 \\*ServerName*\Rediscovery Software Inc\Rediscovery Proficio SQL\  
 \\*ServerName*\sharename\Rediscovery Software inc\Rediscovery Proficio SQL\

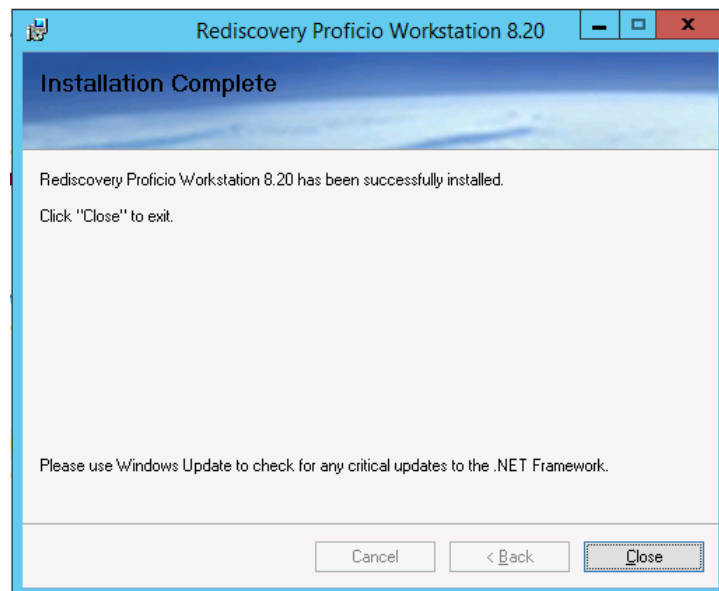
**For standalone installations:**  
 C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL  
 or the path you used on page B:26 above.

- Click Install.
- Please wait while the Workstation installs. This may take 3-5 minutes to complete, depending on the speed of your computer. Be patient and it will complete.



- A DOS window will appear briefly just before completion.





- When the installation is complete, click Close.
- Your installation is complete. Click Close on the installation menu.

**Proceed to the next step for important information for setting up file permissions.**

4. *What File Permissions must be established on the program folder?*

You must now set File Permissions through Windows Explorer. The three basic ICMS user profiles that will need certain permissions established to run the program are:

- Public Search – users with only Public Search or Researcher rights for read-only access to the data.
- Data Entry – general users with Data Entry rights, without access to the administrative functions within Re:discovery.
- ICMS Administrator – power users with full access to all functions including creating new directories and backup functions.

The following chart lists the folder and subfolders with the permissions required depending on the user's security profile within the program. These folders are located in C:\Program Files (x86)\Rediscovery Software Inc\ on the server.

Folder name	Permissions by User Type		
	Public Search	Data Entry	ICMS Administrator**
Rediscovery Proficio SQL			Full
Bin	R	R	Full
Data		R	Full
Dictionaries	R	R	Full
Docs		R	Full
FullImages	R	RM	Full
Media	R	RM	Full
Query Express		R	Full
SetRediscoveryAccess		R	Full
Sweep		R	Full
Thumbnails		RM	Full
Updater		RM	Full
Upgrade		R	Full
VisualRediscovery		RM	Full
WorkstationInstall			Full
Connection.config file	R	R	Full
Rediscovery Proficio Workstation	R	RM	Full
Bin	R	RM	Full
Dictionaries	R	R	Full
Docs	R	R	Full
Query Express		R	Full
Synchronizer	R	Full	Full
Updater (if present)		RM	Full
Upgrade		R	Full
VisualRediscovery	R	RM	Full

R = Read & Execute + List Folder Contents + Read, M = Modify + Write, Full = Full Control

\*\* ICMS Administrators require full permissions on the Rediscovery Proficio SQL folder to create and delete subfolders when they create new directories and perform data backups or transfers to disk.

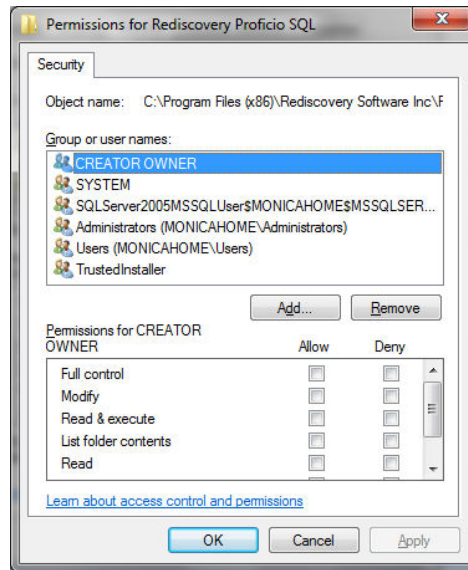
5. *How do I set up file permissions?*

To set up file permissions:

- Open Windows Explorer and navigate to the C:\program files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL folder.

**Note:** To save time, you may wish to apply these permissions to the main \Rediscovery Software Inc folder instead of the separate folders under that.

- Right click on the folder and choose Sharing and Security.
- Select the Security tab and click Edit.

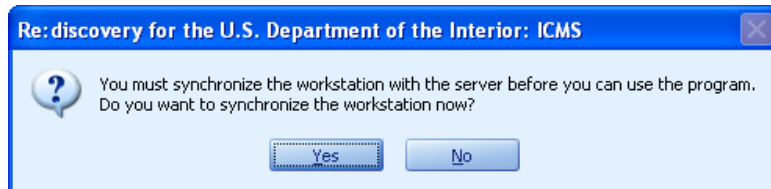


- You can either add different groups to the list if you have users separated into groups, or select the Users group from the list.
- Use the chart above to define Permissions for each user profile. If you are only using the Users group, you should check the Modify permission (Write will automatically be selected with this). Read & Execute, List Folder Contents, and Read are usually automatically selected when a new program is installed. You can apply these permissions to the entire Rediscovery Proficio SQL folder, or, if you prefer, select the individual subfolders and apply permissions as shown in the chart above.
- Click Apply, then OK to save the File Permissions.
- Follow these same steps on the C:\program files (x86)\Rediscovery Software Inc\Rediscovery Proficio Workstation folder.

**If you are installing Proficio on a stand-alone computer, you are finished!**

Your computer’s desktop will have a new shortcut for “Rediscovery ICMS.” The same option will also be found from the Windows Start button, under All Programs. Start the program to test the installation. The default login is the User ID **red** and the password **red**. This is an Administrator level login.

**Note:** The first time you start the workstation, right-click on the shortcut and select Run as Administrator for Windows 7, 8, 2008 R2, 2012 and 2012 R2. It may need to synchronize which requires this admin role. Click Yes.



**Note:** If you plan to access the program from other individual computers over the network, please refer to the instructions for Network Configuration

and Workstation Installation to enable remote connections to SQL (Section F below). Install the client portion on the workstations that will be connecting to this server installation (see Section G below).

***You must now enable remote connections to SQL in Section F below, and install the client portion on the workstations that will be connecting to this server installation using Section G below.***

## F. Network Configuration for Network Installations

***You must complete this section in order to enable the software to be used in a network environment whether you used SQL Server Express (Option 1) or SQL Server Standard Edition (Option 2) installations.***

***You must enable remote connections, the SQL Server Browser Service, and SQL Server communication through the firewall. Follow these instructions on the server where ICMS's SQL databases are located.***

1. *What network configurations must be done to access the program across a network?*

To use the program in a network environment, you must:

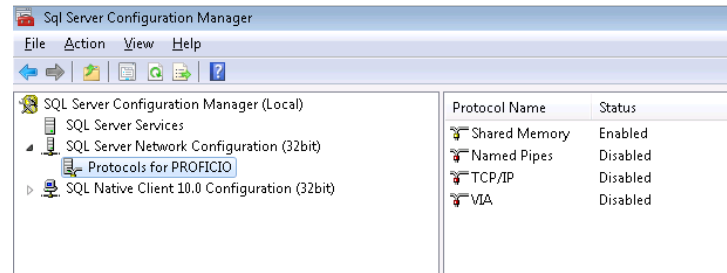
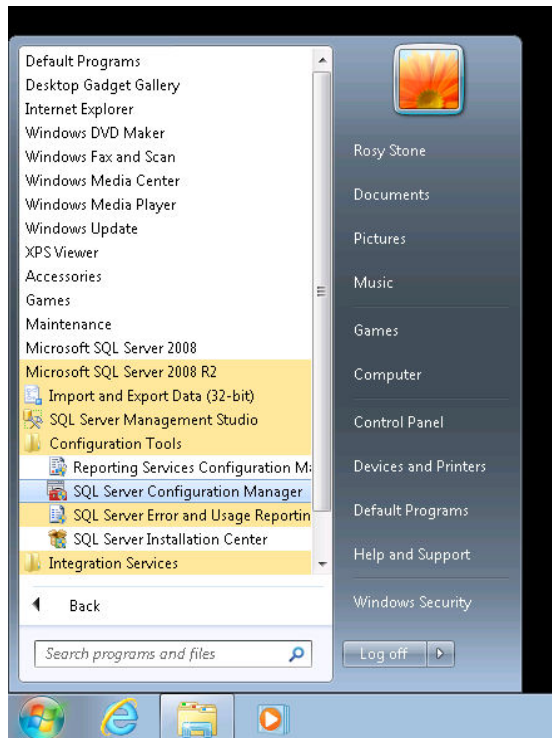
- enable remote connections to the SQL Server
- enable the SQL Server Browser Service
- enable SQL Server communication through the firewall **Note:** On many Windows operating systems such as Windows 2008 and 2008 R2, 7, 8, 2012, and 2012 R2, even if the firewall is turned off, you still must create inbound rules.
- share a folder on the server where ICMS is installed to allow access to the program on the network. (See section C.3-4 above – this is done prior to installation.)
- set additional network permissions on the shared folder.

**Note:** Remote connections and SQL Server Browser Service are automatically configured during the SQL Server Express installation in Option 1 – skip to F.4 below to continue with the other network configurations.

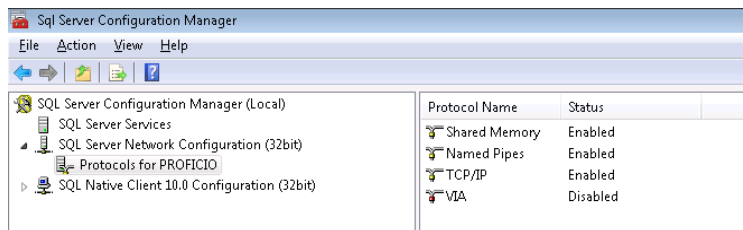
2. *How do I enable remote connections to the SQL Server?*

To enable remote connects for your SQL Server installation:

- Click the Start button on your task bar and select All Programs. Then select Microsoft SQL Server → Configuration Tools → SQL Server Configuration Manager.

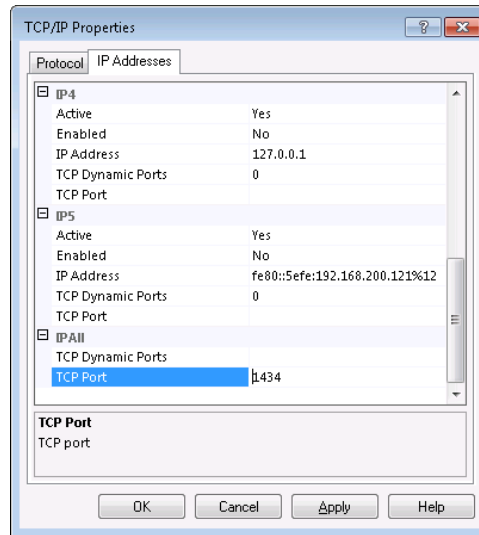


- In the navigator on the left, expand SQL Server Network Configuration (32 bit) and select Protocols for PROFICIO (PROFICIO = your SQL instance)
- In the right pane, right-click on Named Pipes and select Enable. Then right-click on TCP/IP and select Enable. Both times, you will get a message that the change will be saved but will not take affect until the service is restarted. Click OK both times. They will now have Enabled in the Status column. If they are already enabled, skip to the next step.



- While you are in the Protocols for the SQL instance, you also need to specify a SQL port for Proficio to use.

- Right click on TCP/IP and select Properties
- Select the IP Addresses tab and then scroll down to the IPAll section.



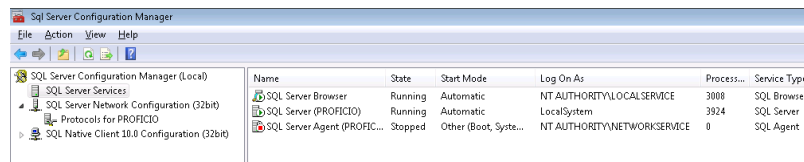
- Enter 1434 next to TCP Ports  
**Note:** If you already have another instance of SQL Server using this port, you need to use a different port (1435 for instance).
- Click Apply. You will get a message that the change will be saved but will not take affect until the service is restarted. Click OK.

***Do not exit this screen yet, continue with F.3 below.***

3. *How do I enable the SQL Browser Service for SQL Server?*

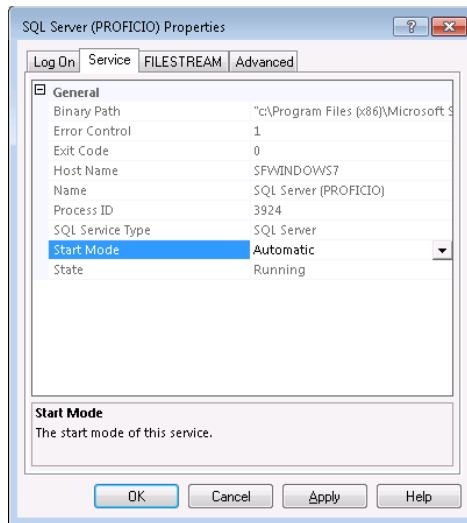
To enable the SQL Server Browser Service, in the SQL Server Configuration Manager:

- Click on SQL Server Services in the navigation pane on the left



- The Start Mode for "SQL Server Browser" and "SQL Server (InstanceName)" needs to be Automatic. If it is set to Disabled or Manual, then right-click on each one that is not Automatic and select Properties. Then on the Service Tab change the Startup Mode to Automatic and click Apply and then click OK. If they are both set to Automatic, you do not need to do this step.

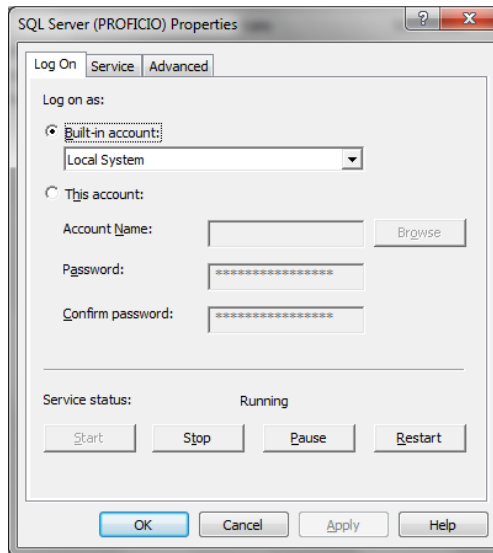




- For the SQL Server (Instance Name), it is recommended that you use LocalSystem for the Log On As. If this is set to NTAuthority/NetworkService, you must change it to LocalSystem or a user account that has administrative privileges on the server.

Right click the SQL Server (Instance Name) and choose Properties.

On the Log On tab, select either Built-In account and choose Local System. Or you can select This Account and enter a network account with administrative privileges on this server.



- Click Apply. You will get a message that the change will be saved but will not take affect until the service is restarted. Click OK.
- Now that all the changes have been made in the SQL Configuration Manager, you need to restart the SQL Service. Right-click on "SQL Server (InstanceName)" and select Restart. The Service will stop and then start again. All of the above changes will take affect.

***Do not exit this screen yet, continue with F.4 below.***

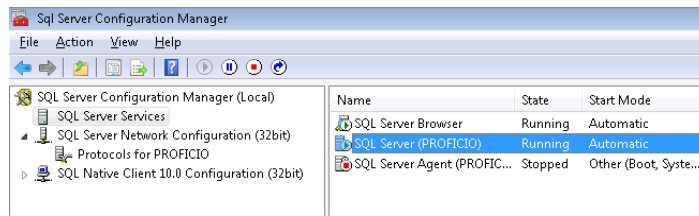
4. *How do I enable communications through the Windows firewall?*

You must enable communications (called Inbound Rules) through the Windows firewall for both installation Option 1 (SQL Express Edition) and Option 2 (SQL Standard Edition). **(Even if the firewall is turned off.)**

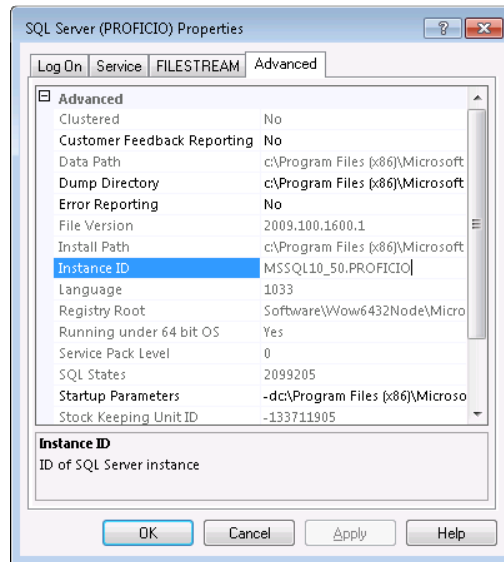
**Note:** If you use SQL server as the backend database engine for other applications, you may have more than one instance of SQL Server. You must create an exception in the firewall for each instance of SQL Server that you want to accept remote connections.

To create inbound rules in the firewall for the instance of SQL Server used by ICMS, you must first identify the correct instance ID.

- In the SQL Server Configuration Manager, select SQL Server Services in the left pane.



- Right-click on the instance name in the right pane and select Properties. For installations using SQL Server Express (Option 1) the instance name is SQL Server (PROFICIO). For installations using an existing SQL Server (Option 2), the instance name is decided by the SQL administrator at your location and is prompted for during the installation process (called SQL Server Name).

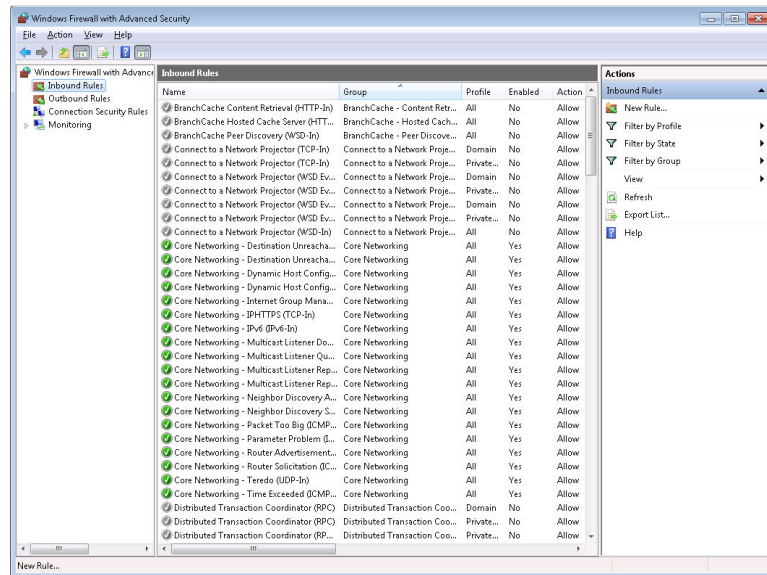


- Click the Advanced tab and locate the Instance ID in the property list. Make a note of it and then click OK.

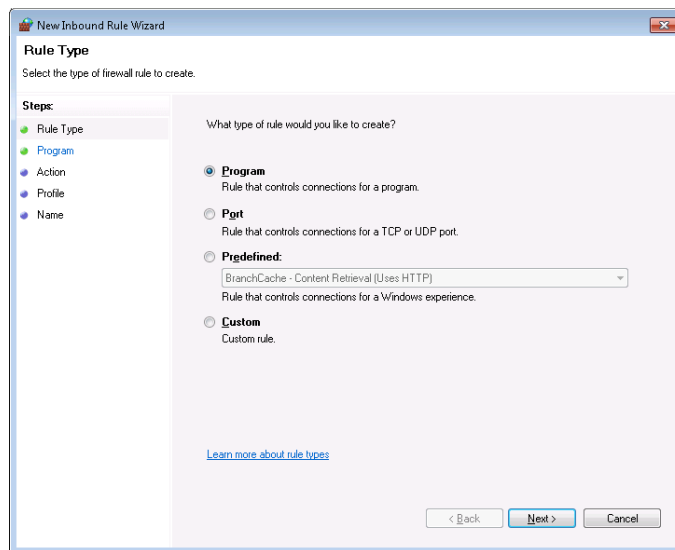
To create the inbound rules in the firewall for that instance:

- Click the Start button on your task bar and select Control Panel. Change the View By in the upper right-hand corner to Small Icons and then select Windows Firewall.

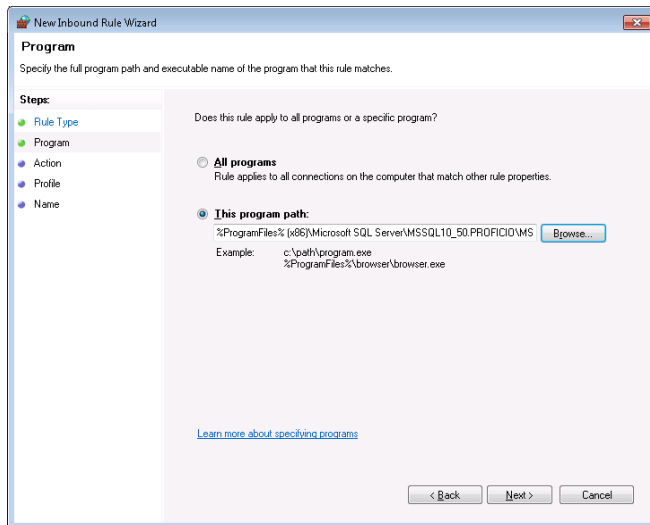
- In the panel on the left, select Advanced Settings.



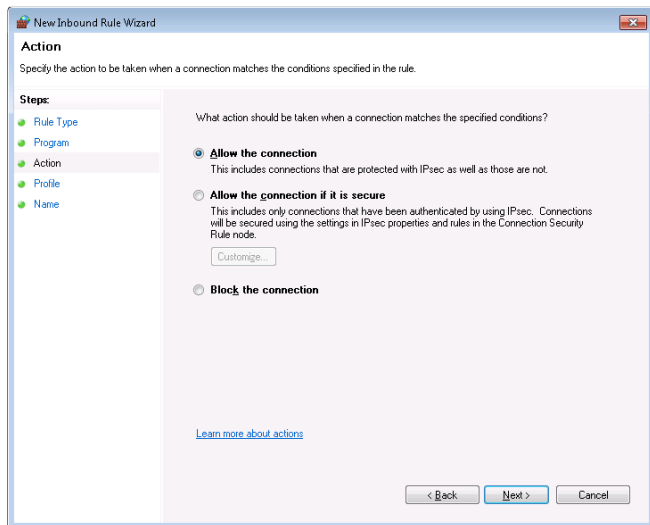
- In the left panel, click Inbound Rules and then in the Actions panel on the right, click New Rule.



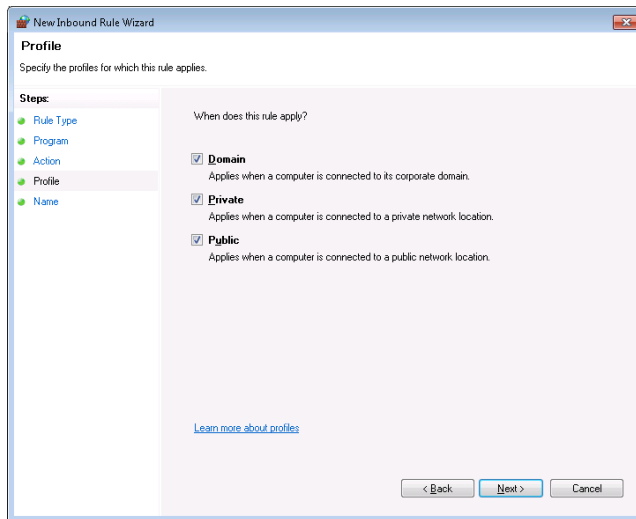
- You will need to add 3 separate Inbound Rules, one at a time. Each time, always allow the connection for Domain, Private, and Public.
  - a. Rule for Program SQL Server:
    - i. Select Program and click Next



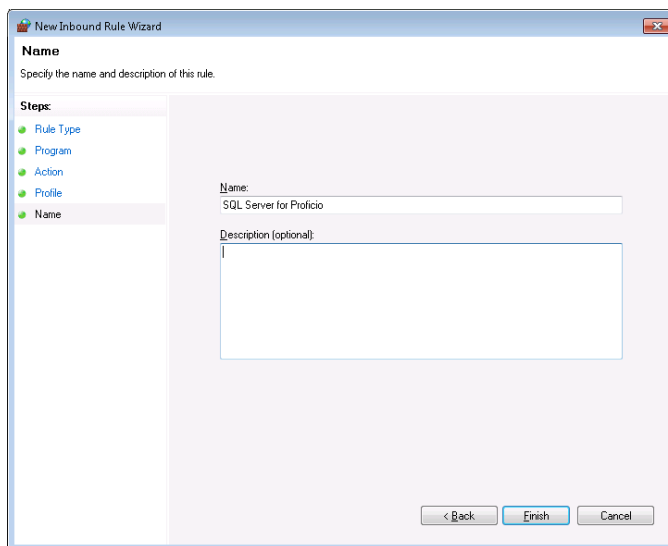
- ii. Select "This program path" and use the Browse button to select the executable file for this instance of SQL Server. C:\Program Files (x86)\Microsoft SQL Server\MSSQL10\_50.InstanceName\MSSQL\Binn\sqlservr.exe [Note: the path may be different depending on where SQL Server is installed. MSSQL10\_50.InstanceName is the placeholder for the instance ID name that you made note of earlier.] [If this is a 32-bit computer, then the path does not contain the (x86).] Click Next.



- iii. Select Allow the connection and then click Next.



- iv. Put check marks next to Doman, Private, and Public and then click Next.



- v. Enter a Name for the rule and click Finish.

- Follow the same steps as above to add a New Rule for the SQL Browser which is located at C:\Program Files (x86)\Microsoft SQL Server\90\Shared\sqlbrowser.exe [Note: If this is a 32-bit computer, the path does not contain (x86).]
- Follow the same steps to add a New Rule for the SQL port. But this time . . .
  - i. On the Rule Type page, select Port (instead of Program)
  - ii. On the Ports and Protocols page, select UDP port and Specific Local Ports and type in the port number 1434 (or whatever port # you used above for IPALL). The remaining settings are the same as for the programs.

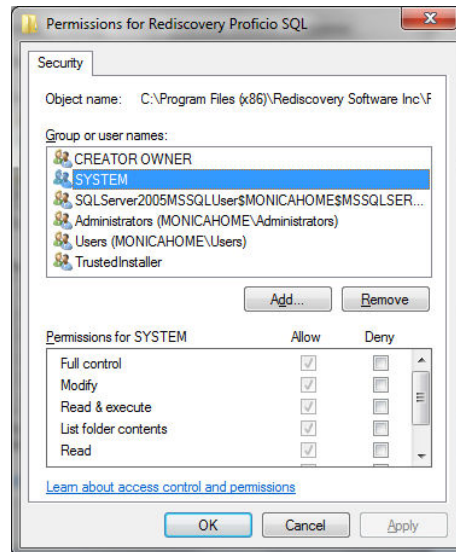
5. *What additional network permissions need to be set on the shared folder on the server?*

In addition to the individual or group network logon accounts permissions that were set in Sections D.4 and E.4 above, there are two other user/group accounts that must be granted access to the network share and folder security for the program.

- SQL user group account – the SQL user account is a group account created by SQL to perform database tasks. This SQL account must have Full permissions in both the network share and Rediscovery Proficio SQL folder security on the server. The specific account name is `SQLServerMSSQLUser$computername$InstanceName`. **Note:** This is not a network account, only a local account where SQL is installed.
- SQL service logon account – SQL has a service that runs continuously on the server or stand alone system. This service runs under a specified account, generally “Local System.” The Local System account (listed as ‘System’ in the user\group list) must be granted Full permissions in both the network share and Rediscovery Proficio SQL folder security for certain functions to work within the program such as backups and creating directories. If the service is using a different logon account, that account must be granted these same security permissions.

**Service Account:** To determine which account is being used by the SQL service, go to Control Panel → Administrative Tools → Services. In the list of services, locate the SQL Server (Proficio) entry or the service for your SQL Server. Right click on this service and select Properties. In the Properties window, select the Log On tab. It will either be set to Local System Account (recommended) or This Account with a specific account name listed. If it is not set to Local System Account, we highly recommend that you change it to use the Local System Account. **Note:** When you apply this change, you will be asked to restart the service for the change to take affect. Right click on the SQL Server (Proficio) service and choose Restart.

- To add both of these local accounts (the SQL user group and the SQL service logon) to the share permissions you will need to change the Location in the Select Users or Groups window to the local computer by clicking the Location button and selecting the local computer name at the top of the list. Then follow the same steps as above to add them to the list. Give each of these Full Control.



***Once you have completed the network installation and configurations, you can install the client component on the workstations that will access ICMS over the network in Section G below.***

## **G. Installing Workstations for Network Installations**

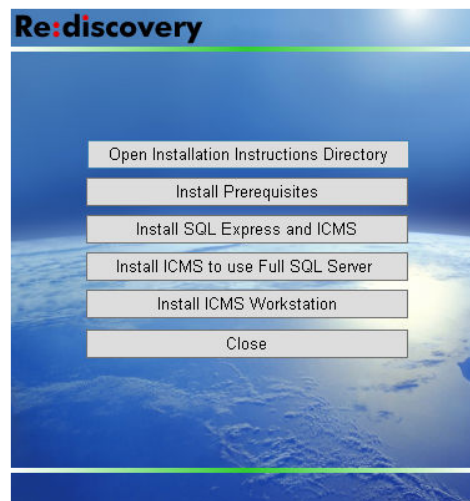
### **1. *When do I need to install workstations?***

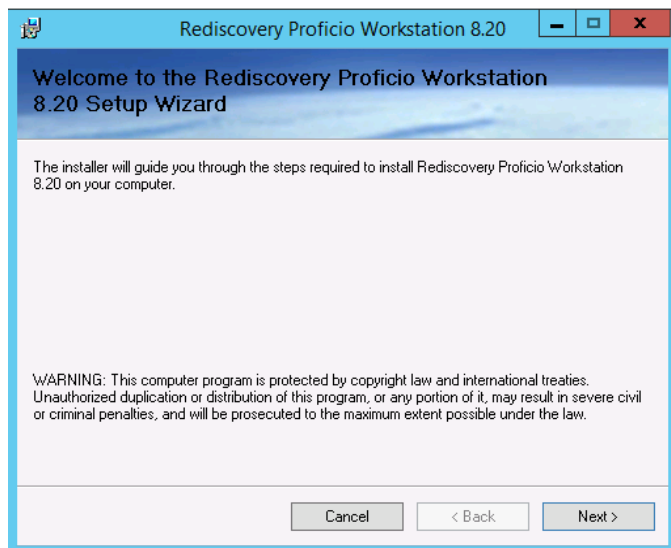
Use this option to install the client component on workstations for a network installation. You must install Option 1 or Option 2 on the server and complete the network configurations in F above before you can install workstations.

### **2. *How do I install workstations?***

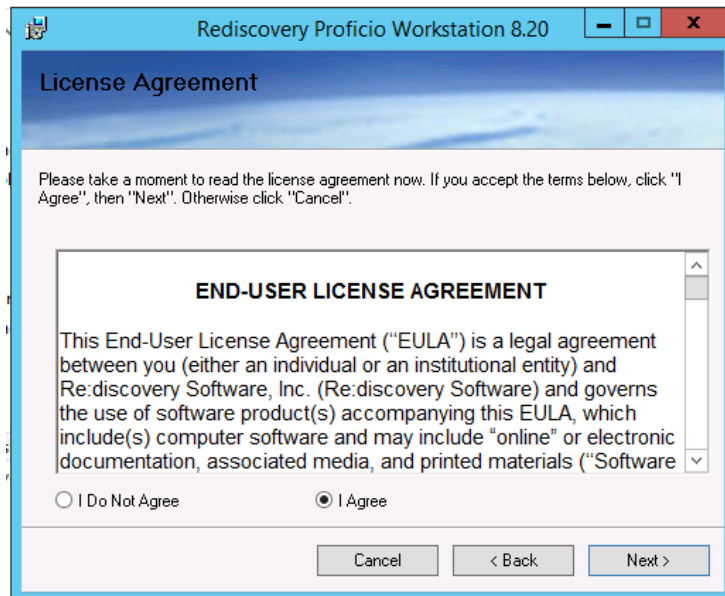
To install workstations for a network installation:

- First, install the prerequisites on each workstation following Section C.1 above.
- Then, on the installation menu, click the **Install ICMS Workstation** button.



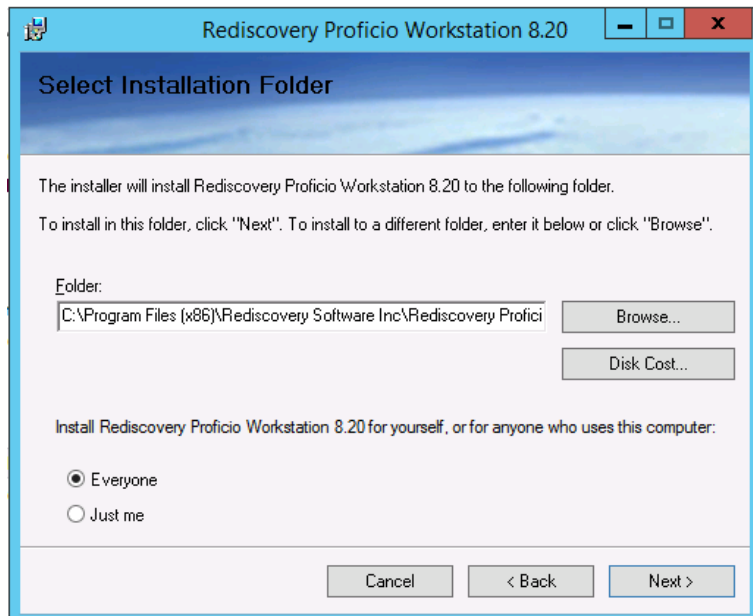


- Click Next to continue.

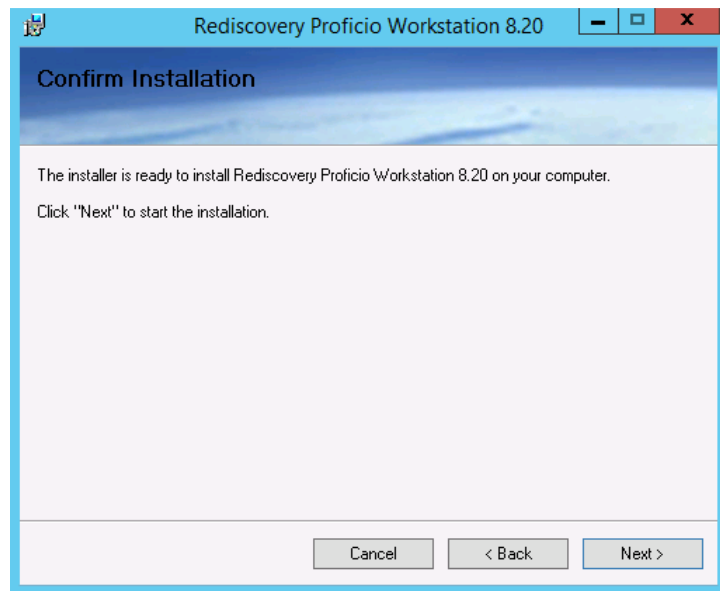


- Review the End-User license Agreement. Select “I Agree” and click Next.

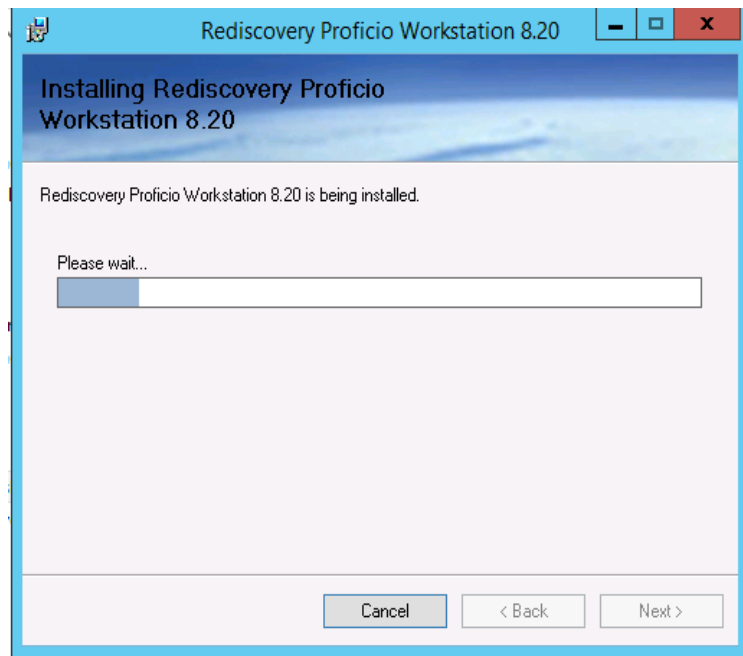




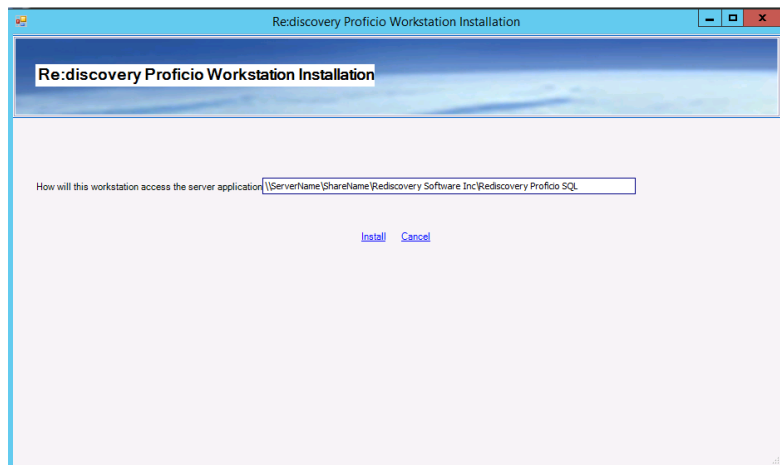
- The workstation component will install to the folder C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio Workstation. If you are installing the program to an alternate location on this computer, use the same path here as you did for the prerequisites installation, leaving the remaining folder structure as \Rediscovery Software Inc\Rediscovery Proficio Workstation\. Select "Everyone," then click Next.



- To confirm the installation, click Next.



- The installation will proceed.
- In the next window, edit the path for how this workstation accesses the server application. This is the same path you put in the field "How will Workstations reference this server installation?" when you installed the program on the server. This will be the UNC path to your server installation. (A UNC path refers to the server name rather than a drive letter).



For example:

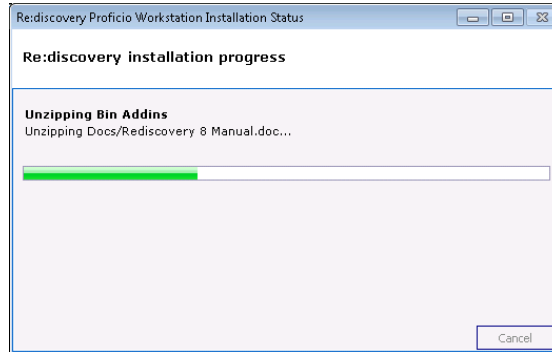
If the network share is on the Rediscovery Software Inc folder on the server:

**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL**

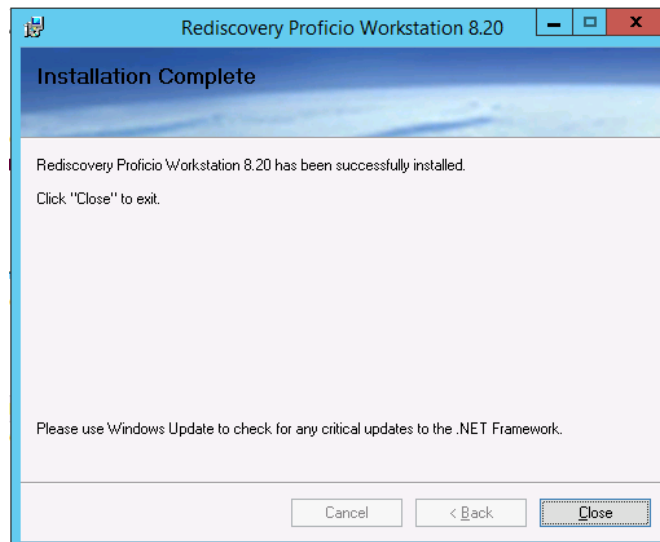
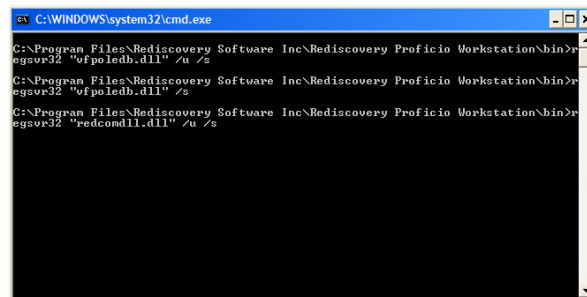
If the network share is on a folder above the Rediscovery Software Inc folder on the server:

**\\ServerName\sharename\Rediscovery Software Inc\Rediscovery Proficio SQL\**

- Click Install.
- Please wait while the Workstation installs. This may take 3-5 minutes to complete, depending on the speed of your computer. Be patient and it will complete.



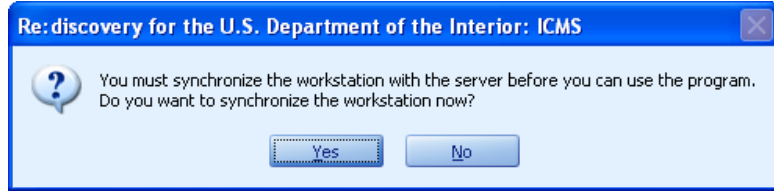
- A DOS window will appear briefly just before completion.



- When the installation is complete, click Close.
- Your ICMS Workstation is now installed. Click Close on the installation menu.

Your computer's desktop will have a new shortcut for "Rediscovery ICMS." The same option will also be found from the Windows Start button, under All Programs.

**Note:** When you start the program for the first time, it may ask to Synchronize with the server. Click Yes.



3. *What file permissions are required on the workstation installation?*

You must set up file permissions on the workstation installation for certain folders so that the program can write to certain log files. The following chart lists the folder and subfolders with the permissions required depending on the user's security profile within the program. The folders are located under C:\Program Files (x86)\Rediscovery Software Inc\ on the workstation.

Folder name	Permissions by User Type		
	Public Search	Data Entry	ICMS Administrator
Rediscovery Proficio Workstation	R	RWD	Full
Bin	R	RWD	Full
Docs	R	R	Full
Dictionaries	R	R	Full
Query Express		R	Full
Synchronizer	Full	Full	Full
Updater (if present)		RM	Full
Upgrade		R	Full
VisualRediscovery	R	RWD	Full

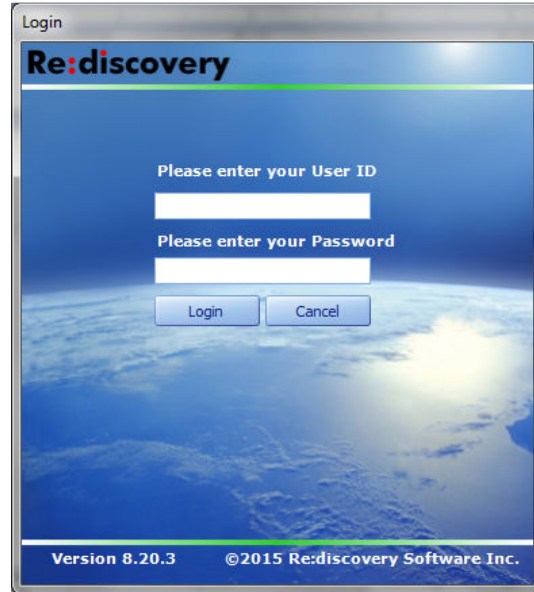
R = Read & Execute + List Folder Contents+ Read, M = Modify + Write, Full = Full Control

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## H. Starting and Using ICMS

### 1. How do I start the system?

Start **ICMS** by double-clicking the Rediscovery ICMS desktop icon, or from the Windows Start button by choosing All Programs, Rediscovery ICMS. The Re:discovery login screen will open.



### 2. How do I login to the system for the first time?

For your first-time use, you will enter a general login name and password.

- Enter RED as your login name
- Tab to the password field and enter RED as your password.
- Press Enter or click the Login button.

**Note:** The system will contain no data directories until you create them.

Refer to Section IV in Chapter 9, Tools for information on how to create new directories.

***For security purposes, it's important that you change the general password and login name as soon as possible. Create specific login names and passwords for unit staff when you finish the installation process described in this appendix. Refer to Section VI in Chapter 9, Tools.***

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## I. Running the ICMS Upgrade

### 1. How do I upgrade my ICMS 8.16 to ICMS 8.20?

For all bureaus and units who have ICMS version 8.16 installed, you will need to upgrade your existing installation to version 8.20. The ICMS upgrade will update your existing system in place so that you do not need to install ICMS separately.

There are two types of upgrades explained in these instructions:

**Upgrading an ICMS 8.16 Standalone or Server installation:** Upgrade an ICMS 8.16 standalone or server system where the data “live.” A standalone ICMS may be on a laptop or desktop computer. A server ICMS system may be on a network server or on a shared desktop computer. (I.4 below)

**Synchronizing workstations to ICMS 8.20 :** Synchronize an ICMS workstation to version 8.20 that shares data that “lives” on another computer (server or shared computer) across a network. Note: the server must be upgraded before workstations will synchronize. (I.5 below)

***It is important that you do every step in these instructions. DO NOT skip any steps unless specifically noted. If you get a message that does not match what you see in these instructions, STOP there and contact the tech support team at Re:discovery at 434-975-3256, option 4.***

2. *What should I do before I start the upgrade?*

Before running the upgrade:

- Close all programs and deactivate the screen saver. If this is on a laptop, plug the laptop into a wall outlet and deactivate all “sleep” and screen saver options. This will maximize processor attention to the ICMS 8.20 upgrade.
- Make sure that your computer has enough free space on the drive where the data live. We recommend a minimum of 2 GB free space.
- Take the time to review your current ICMS system. **If you have “Temporary” or project directories that are no longer needed, now is a good time to delete them.** Such directories may be old data sets you received from NPS Centers, or contract catalogers, or for special projects that are now complete. In general for NPS units, the only directories that should be present in ICMS are those with the 4-letter acronym of the parks for which you manage collections. You can make a backup of any un-needed or “temp” directories, to have them available to load in future if needed. **Backing up and removing un-needed directories from ICMS will make the upgrade go faster.**
- ***Before applying this upgrade, you must make a complete ICMS backup!*** We recommend using File menu, Backup Data, Complete System Backup in ICMS. All other users should exit ICMS before you begin the backup and upgrade processes.
  - To make the backup, log into ICMS with Administrator-level rights. From the File menu, select Backup Data.
  - Choose Complete System Backup.
  - Select the location where you would like to save the backup file.
  - Click Start Backup.

If you encounter any problem backing up your data, contact Re:discovery Tech Support!

**Note:** For NPS Centers, BOR Denver, or other units that manage many collections in a single copy of ICMS, the Complete System Backup option may be unable to complete because SQL has a limit on the length of the backup command. In that case, use the Selected Directory backup option (with Images), and select individual or small groups of directories to backup.

**Note:** You may opt to use your usual network/server or SQL-specific backup process, if you use one. In that case, ensure the backup is valid and accessible before starting the ICMS upgrade process. We strongly recommend you have a valid and accessible data backup as a general rule, and definitely before starting the upgrade process. Your backup should be available for use in restoring the program to the previous version, in the unlikely case that the upgrade does not complete properly. The advantage of the ICMS backup process is that it can easily be used to restore your data in ICMS in case of emergency.

- Check your permissions on the Rediscovery folder (do not skip this step even if you believe your permissions to be correct). **You will need to be logged into the computer with Admin rights for the following steps**
  - In ICMS, from the Tools menu, System Options, Imaging tab, note the location in the gray box for “When image files are copied to the server...” The path will be similar to this:
    - a) C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL, or
    - b) \\ComputerName\Rediscovery Software Inc\Rediscovery Proficio SQL.
  - Open Windows Explorer on the computer where you plan to run the upgrade.
  - Navigate to the location you noted above.
  - Right-click on the “Rediscovery Software Inc” folder and select Properties.
  - Click on the Security tab.
  - Click on the Edit button.
  - If the list of Group or User Names includes “Users,” click on it.
  - In the chart below put a check mark next to Modify under Allow.
  - Click Apply.
  - When it’s finished applying the permissions, click OK.
  - Click OK on the Properties window.

Special Note to Windows 2003 users: If you currently have ICMS installed on Windows 2003 Server, there are some steps you need to complete prior to running the upgrade to version 8.20. Please look in the Documentation folder in the upgrade package for a document called “Windows 2003 Server Preinstallation Instructions.docx.” You must follow these instructions before you do the next step.

3. *How long will it take to upgrade to ICMS?*

The upgrade process will take anywhere from 1-2 hours, or more, depending on the speed of your computer and the number and size of your ICMS databases. Be sure you allow enough time to complete the process before you have to leave for the day or a backup process needs to run. **If you have ICMS on your network, we recommend that you run this upgrade from the ICMS workstation on the server (it will be faster).**

4. *How do I get the upgrade package for the ICMS upgrade?*

Get the upgrade and package per instructions from your bureau or the ICMS project office. We recommend you unzip the upgrade package to a flash drive or write it to DVD, to make it portable. You will need the upgrade package to update each ICMS workstation after the version upgrade is complete.

5. *How do I run the Prerequisites for the ICMS upgrade?*

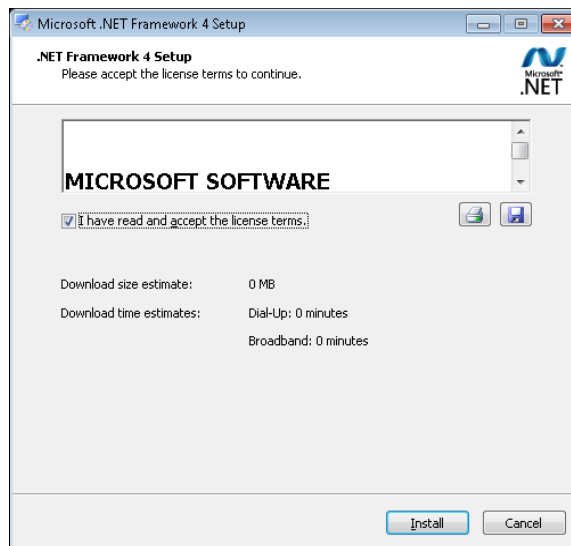
You must first run the ICMS Prerequisites before running the upgrade.

- Make sure you have the **unzipped** ICMS 8.20 Upgrade files accessible.
- In Windows Explorer navigate to the Proficio820Prerequisites folder. In Windows Vista, 7, 8, 2008R2, 2012, or 2012R2, **right-click on autorun.exe and select “Run as Administrator,” even if you are an administrator on the computer.** [If you are on Windows 2003 or XP, you can simply double-click the autorun.exe.]



- Click Install Microsoft .NET 4.0 Framework. The installation of .NET Framework 4.0 will take a minimum of about 20 minutes.

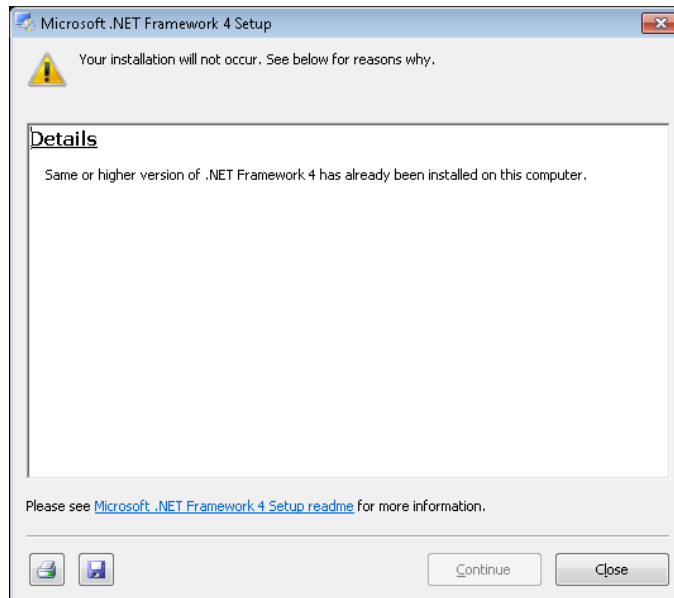
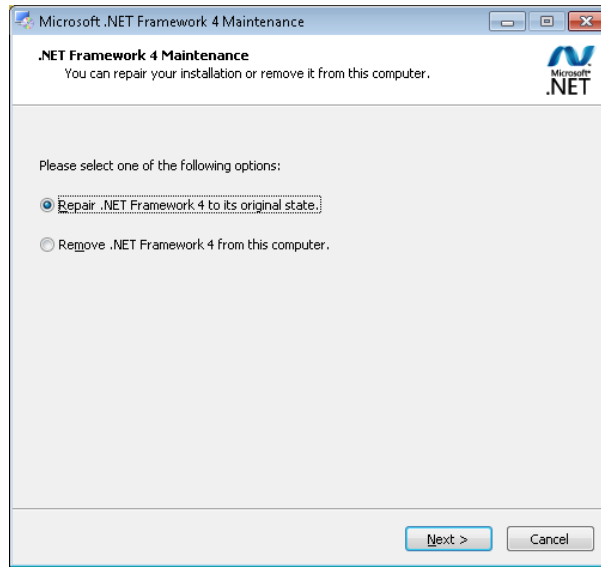
Note for Vista users: If the .NET Framework 4 will not install on your Windows Vista computer, then that specific computer is not compatible with ICMS version 8.20 or higher.



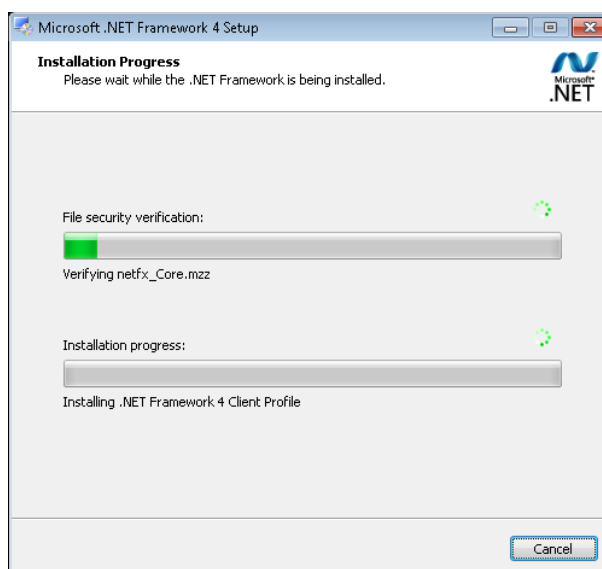
- If .NET Framework 4.0 is not already installed, you should see the first screen for the installation. Check the box to accept the license terms and click Install.
- If you get either of these 2 screens, it means that .NET Framework 4.0 is already installed on your computer. Click



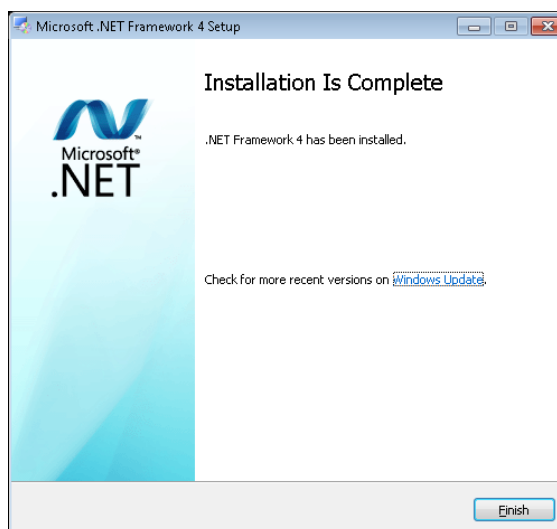
Cancel/Close and then click Yes if it asks if you are sure you want to cancel. Then, proceed to 6 below to run the 8.20 Upgrade.



- Otherwise, the .NET Framework 4.0 setup will proceed. Please be patient during the installation.



- When the installation is complete, click Finish. If you get a message to restart your computer, do so before continuing with the upgrade.

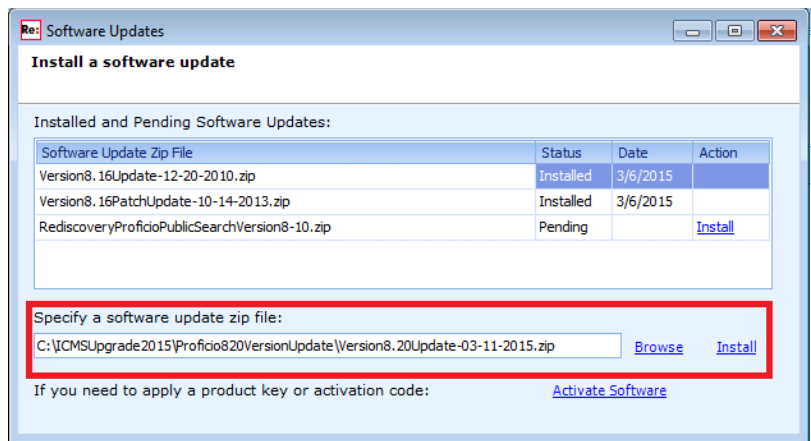


- Click Close on the Proficio Prerequisites menu. You have finished the Prerequisites.

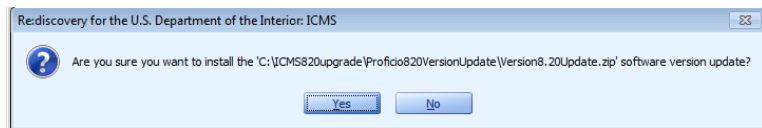
6. *How do I run the upgrade for an ICMS standalone or server installation?*

To begin the upgrade to ICMS version 8.20:

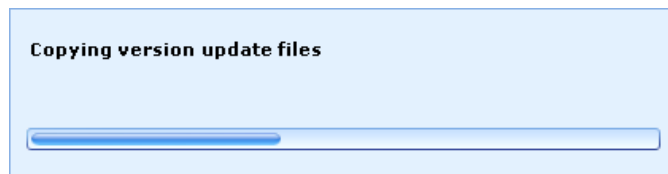
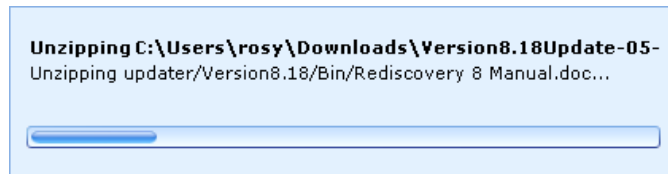
- Start ICMS by **right-clicking on the ICMS icon and selecting “Run as Administrator,” even if you are an administrator on the computer.**
- Log into ICMS with an Administrator-level login. Your network account must have Read/Write rights to the Rediscovery Software Inc folder in order to apply this upgrade.
- From the Tools menu, select SOFTWARE UPDATES.



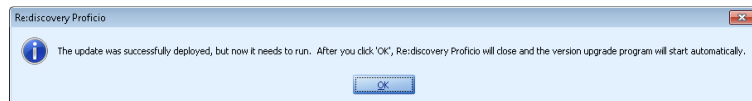
- In the Software Updates window, click Browse.
- In the Open dialog window, navigate to the ICMS 8.20 install/upgrade files, and open the Proficio8.20VersionUpgrade folder. Select the “Version8.20Update.zip” file and click Open.
- In the Software Updates window, click the Install link next to Browse.



- It will ask if you are sure. Click YES.

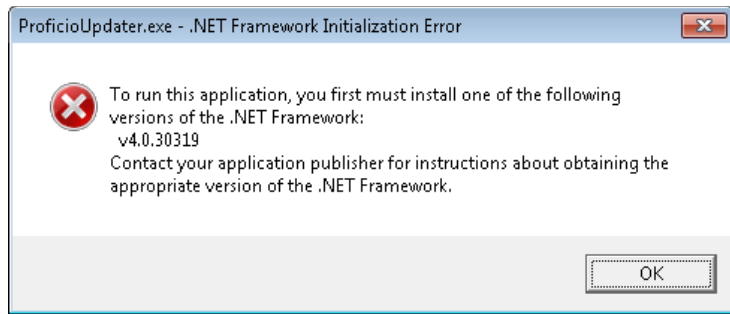


- You will see it unzipping and copying the files necessary to run the upgrade.

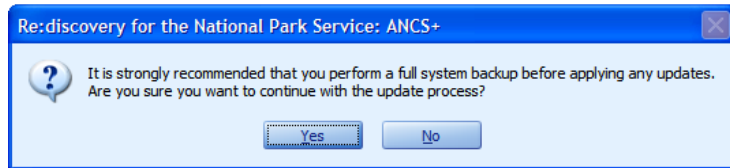


- You will see a message that it deployed successfully, and the system will then restart. The version upgrade is not applied until the program restarts and the upgrade runs. Click OK.

**Be patient after you click ok. It could take several minutes for the system to close and the next screen to come up.**

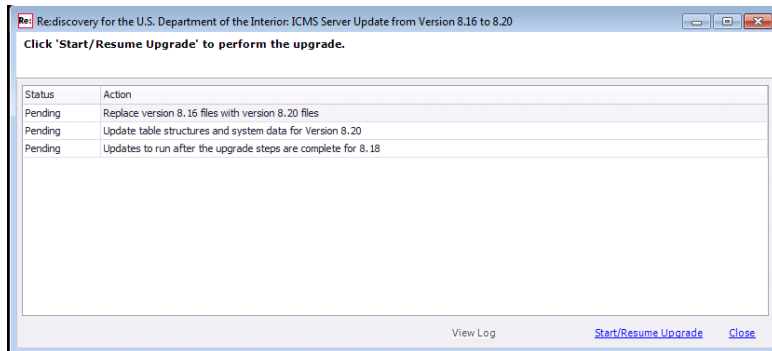


- If you get this message, you did not install the .NET framework 4.0 from the Prerequisites. Go back to section I.5 above.

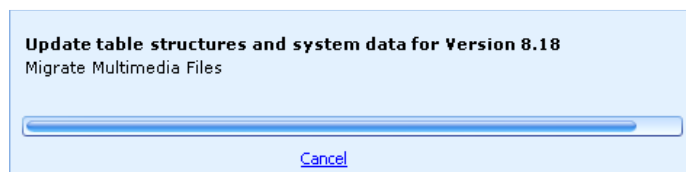


- You'll see an "are you sure you want to continue" message. If you did your backup in Section I.2, click "yes" to continue. If you did not do a backup in Section I.2, click "no" and do one now.

***Note:** if you click "No," the program will close. Log back in to do your backup. Then, exit the program. Do **not** restart it using your shortcut. Instead, to restart the update from this point, navigate to your workstation's Rediscovery Software Inc\Rediscovery Proficio Workstation\Updater\ folder, right-click the **ProficioUpdater.exe** application file and choose Run as Administrator (for Windows 2003 and XP, simply double-click this file).*

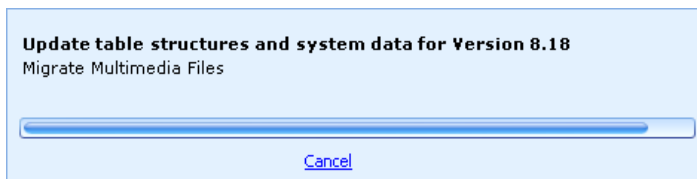


- The Upgrade Actions window opens. This lists the steps of the upgrade process. Click the Start/Resume Upgrade link to continue.

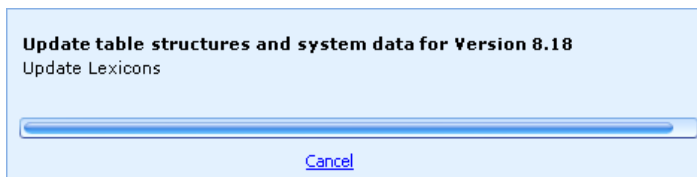


- A progress meter will display while the updates are being applied. Your screens will vary depending on the number of directories in your copy

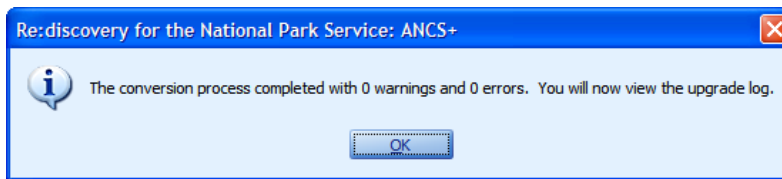
of ICMS. Please be patient. It may appear as though the progress bar isn't moving or that it isn't responding, but the upgrade is running.



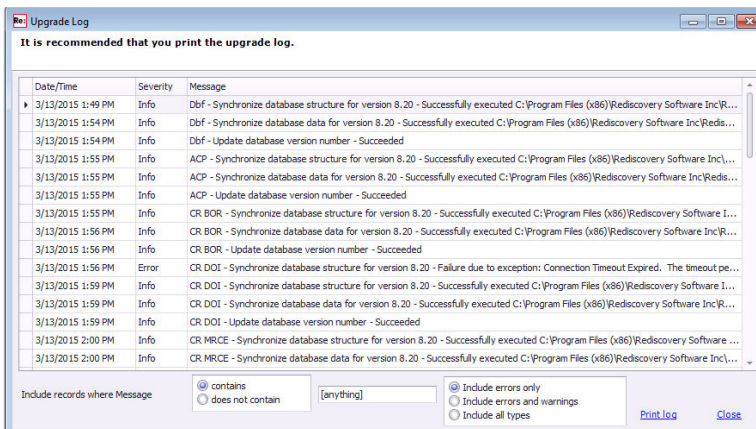
If you have a lot of multimedia files attached to records in ICMS, this step may take a while



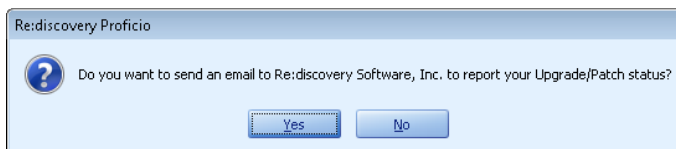
One of the last steps is the update for Nomenclature 3.0 and the Art & Architecture Thesaurus (AAT)



- When the update finishes, you will see a message indicating how the conversion process went. Click OK to view the upgrade log.



- You will see the upgrade log. If there are no errors, click [Close]. If you have errors, please **contact Re:discovery Software Technical Support right away for help** resolving them before closing any windows or restarting the program.

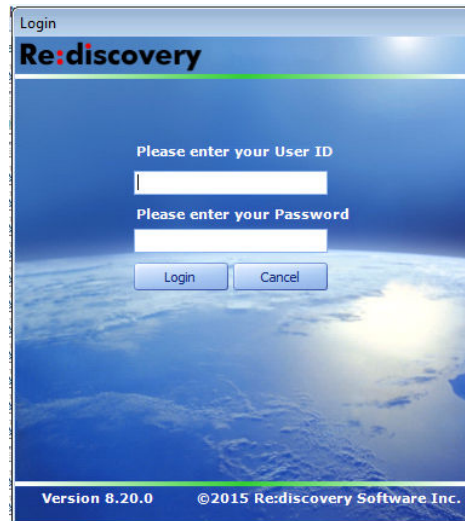


- You have the option of sending an email to Re:discovery Software to let us know that you've applied the update to 8.20. The email to us will include only the upgrade log and the information you provide in the Email form. This lets us keep track of which units have applied the update. If you agree to send the email, click Yes. (If you prefer not to send us the email, click No.)

- Fill in the form, and **include the bureau, office, unit, or park acronym in the Title or Comments field**. Then click OK, and click OK when the message is sent.

- When the upgrade to 8.20 completes without errors, close the log and the Start/Resume upgrade windows.
- If you are in an operating system later than Windows XP, right-click on the ICMS shortcut and select Run as Administrator (otherwise just double-click the shortcut). You will see a message similar to this asking whether or not the workstation should be synchronized to the server.

- When the synchronization process is complete, you will get the ICMS log in screen. Make sure it reads version 8.20.



- Use your usual ICMS user ID and password to log in to ICMS. You are now ready to use this workstation with ICMS version 8.20!

***Remember! If any workstations connect to this installation, you must run the 8.20 prerequisites on every ICMS workstation and synchronize it with the server, before it can be used to access the upgraded program. Use the instructions that begin next to upgrade all workstations.***

7. *How do I run the upgrade for an ICMS workstation?*

After the upgrade to version 8.20, the following steps must be completed on each existing ICMS workstations before it can access the updated program on the network.

***Note: You must have already completed the upgrade on the server system where the data live before upgrading any workstation.***

First, run the 8.20 Prerequisites. This must be done before the workstation can be synchronized with the server copy of ICMS.

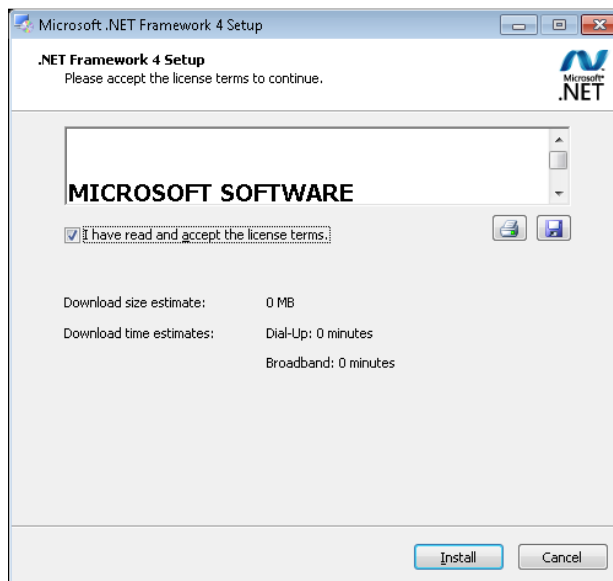
- Bring the install/upgrade package on flash drive or DVD to the workstation (or bring only the “Proficio820Prerequisites” folder to the workstation. The prerequisite installation files must be local to the computer, not on a shared network location. Since you will have to run these prerequisites on every ICMS workstation, we recommend that you copy the folder to a DVD or flash drive. With the installation files now available, follow the instructions below to apply the prerequisites and then the 8.20 update.
- In Windows Explorer navigate to the Proficio820Prerequisites folder that you copied to your local drive or drive physically connected to the computer where ICMS is installed. If you are running Windows Vista, 7, or 8, right-click on autorun.exe and select Run As Administrator. Do this **EVEN IF** you are an administrator on the computer.

[If you are on Windows 2003 or XP, you can simply double-click the autorun.exe.]



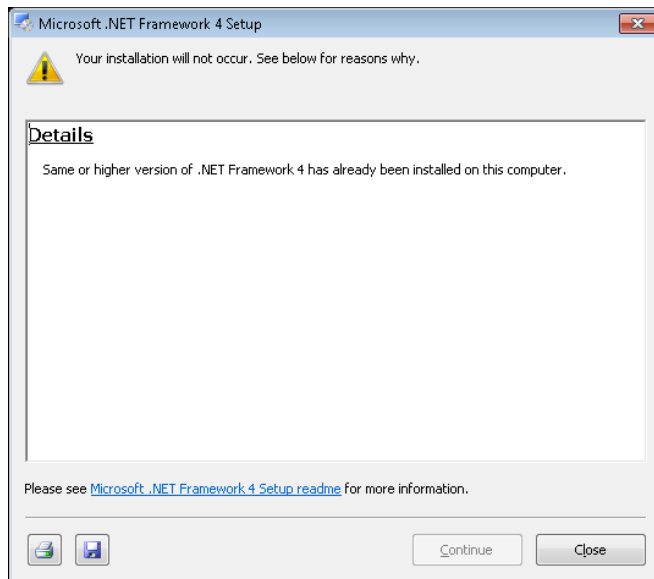
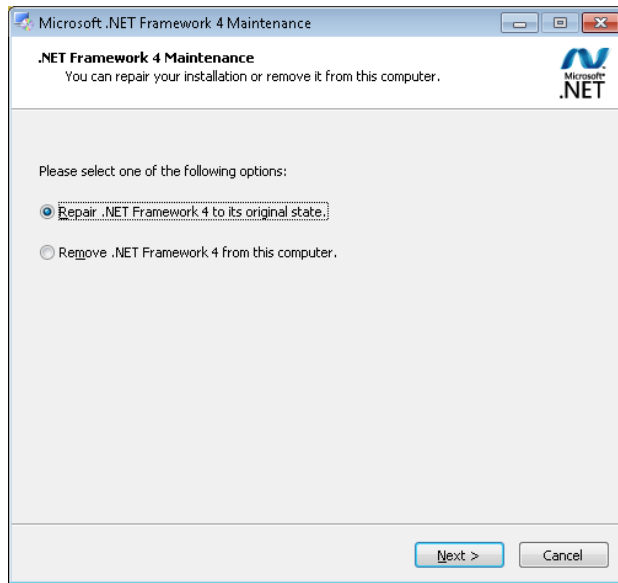
- On the installation menu, click Install Microsoft .NET 4.0 Framework. The installation of .NET Framework 4.0 will take a minimum of about 20 minutes.

Note for Vista users: If the .NET Framework 4 will not install on your Windows Vista computer, then that specific computer is not compatible with ICMS.

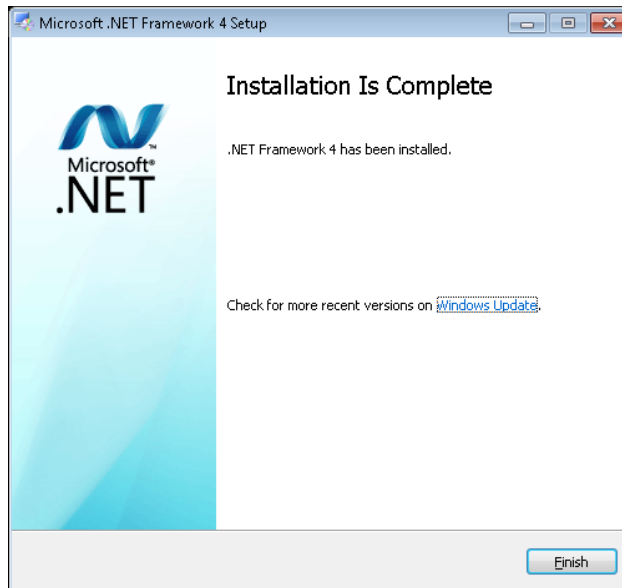
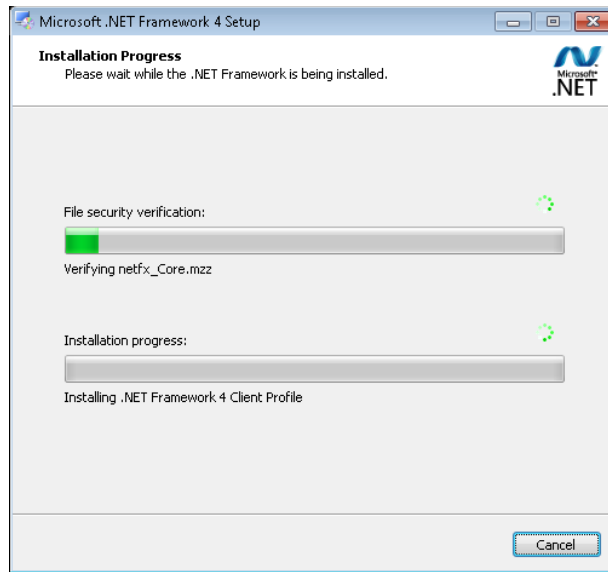


- If .NET Framework 4.0 is not already installed, you should see the first screen for the installation. Check the box that you accept the license terms and click Install.
- If you get either of these 2 screens, it means that .NET Framework 4.0 is already installed on your computer. Click Cancel/Close and then click Yes if it asks if you are sure you want to cancel.





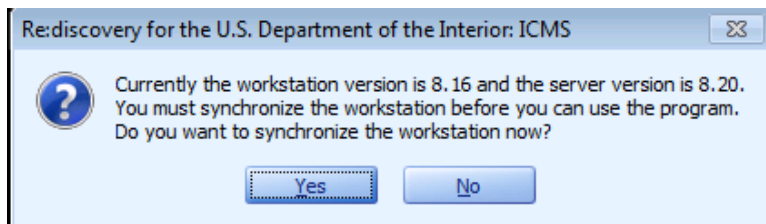
- Please be patient during the installation.



- When the installation is complete, click Finish. If you get a message to restart your computer, do so now before continuing with the workstation upgrade.
- Click Close on the Proficio Prerequisites menu. You have finished the Prerequisites.

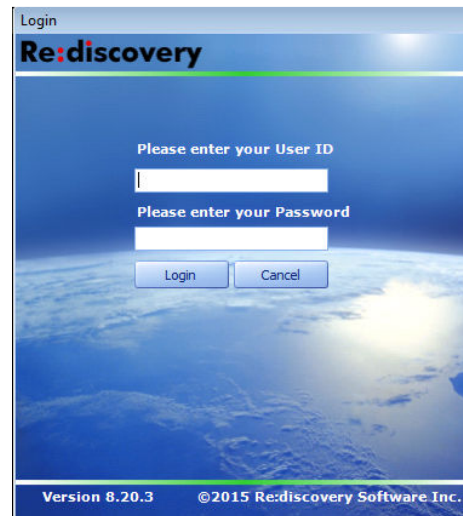
Next, you will synchronize the ICMS workstation with the server:

- If you are in an operating system later than Windows XP or 2003, right-click on the ICMS shortcut and select Run as Administrator. Users will see a message similar to this asking whether or not the workstation should be synchronized to the server.



The workstation will not run until it is synchronized.

- Click “Yes” to synchronize when ready.



- When the synchronization process is complete, you will get the ICMS log in screen. Make sure it reads version 8.20. Use your usual ANCS+ user ID and password to log in to ICMS. You are now ready to use this workstation with ICMS version 8.20!

## K. Uninstalling ICMS

### 1. How do I uninstall ICMS?

Depending on the installation you have, follow the uninstall instructions for that installation type. There are three types of uninstall instructions:

- SQL Server Express Uninstall
- SQL Server Standard Edition Component Uninstall
- Workstation Uninstall

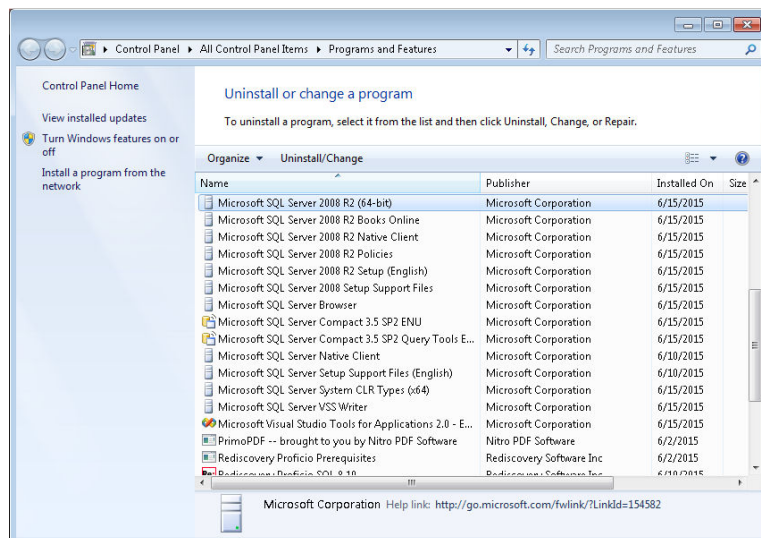
**Note:** Most units will have the first and third type of installation (SQL Server Express). A few will have the second type.

### 2. How do I uninstall the SQL Server Express installation of ICMS?

**Warning.** If you uninstall the SQL Server Express installation, your catalog data will also be deleted. Make sure that you have a backup of your data before proceeding with the uninstall.

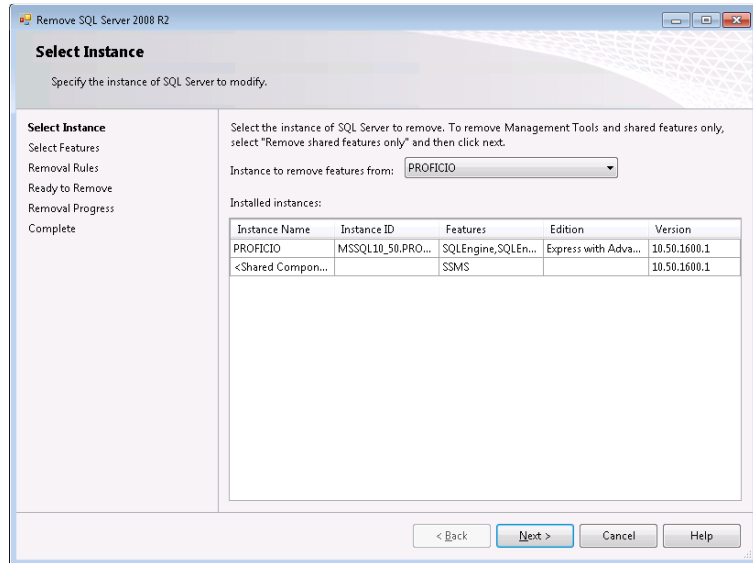
To uninstall SQL Server Express installation of ICMS, you must first uninstall the SQL Server Express before you can uninstall ICMS.

- Click on Start on the Windows Task Bar and choose Control Panel.
- Then choose Programs and Features. Wait while the list of programs is built.
- In the programs list, you will be uninstalling these components in this order:
  - Microsoft SQL Server 2008 R2
  - Microsoft SQL Server Native Client
  - Microsoft SQL Server Setup Support Files (English)
  - Microsoft SQL Server VSS Writer
  - Rediscovery Proficio SQL 8.20
  - Rediscovery Proficio Workstation 8.20

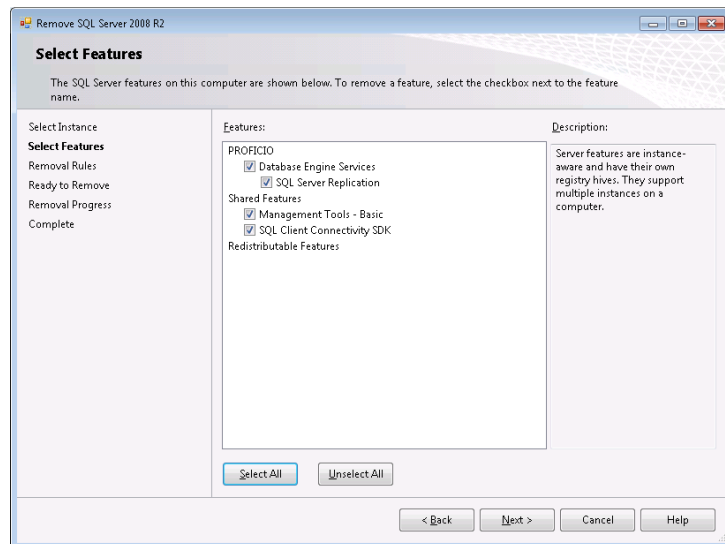


- First, select Microsoft SQL Server 2008 R2 and click Uninstall/Change

- The next message varies based on your operating system. Do any of these steps based on choices you're presented with
  - Click Remove link
  - Click OK after it checks the support files installed.

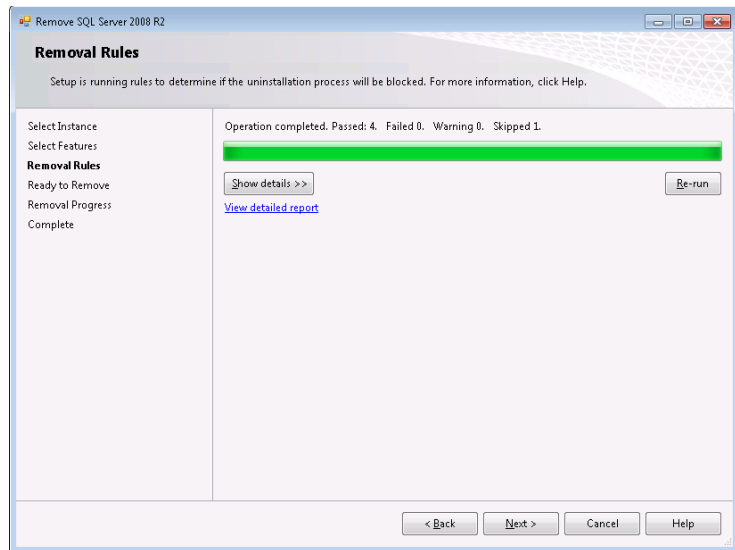


- In the Select Instance window, next to "Instance to remove features from:" select PROFICIO. Click Next.

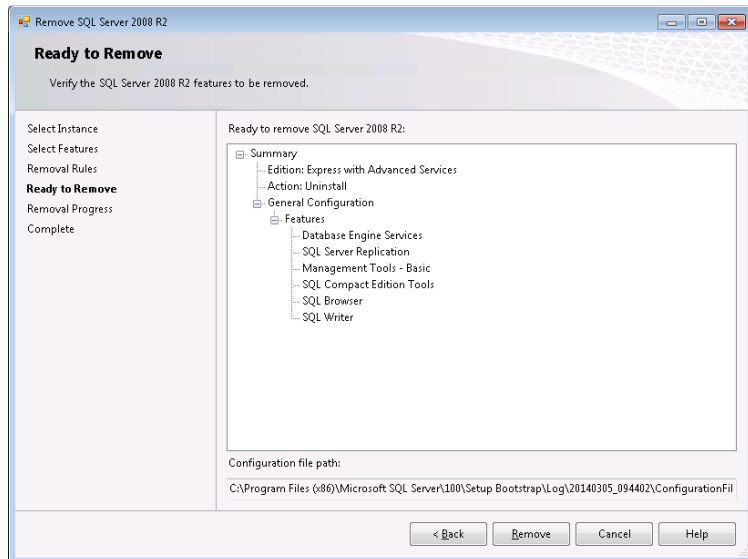


- In the list of Features, check Database Engine Services and SQL Server Replication. If you have no other SQL applications on this computer, you can also check all items under Shared Features. Click Next.

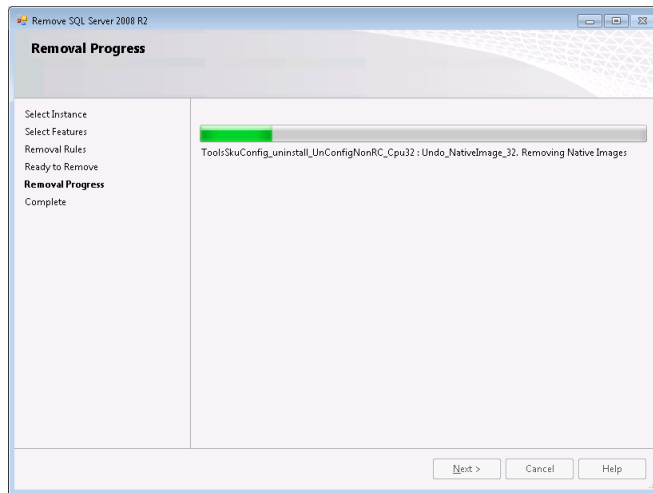
**WARNING: If you have any other SQL applications installed, do not check any of the Shared Features or the other applications will be removed also.**



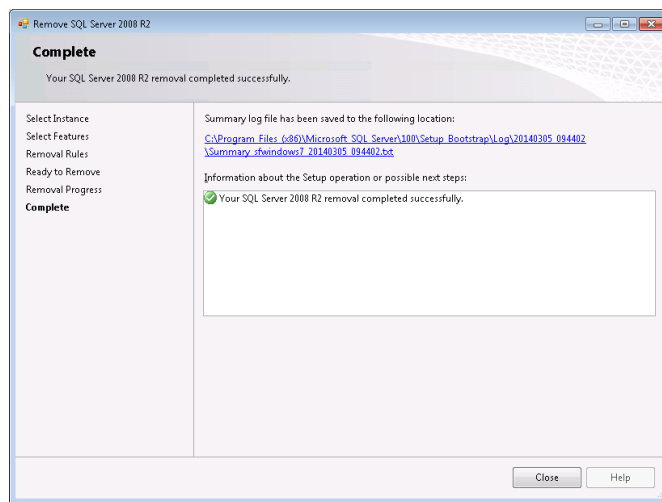
- It will check to see if any removal rules will block the uninstall process. If failed and warning show as 0, click Next.



- On the Ready to Remove screen, it will list the components it will remove. Click Remove.



- The removal progress screen will work through the un-installation. This may take a while.



- When complete, you'll have an opportunity to view the summary log. Click Close.
- Back in the Programs and Features list, The additional components of Microsoft SQL Server (such as Microsoft SQL Server Setup Support Files and Microsoft SQL Server VSS Writer) should be removed automatically after removing the Microsoft SQL Server 2008 R2. If they still appear in the Programs and Features list, press F5 to refresh the list. Then, if any of these components are still listed, select each one and click Uninstall.
  - Microsoft SQL Server 2008 R2 Native Client
  - Microsoft SQL Server 2008 R2 Policies
  - Microsoft SQL Server 2008 R2 Setup (English)
  - Microsoft SQL Server 2008 R2 Setup Support Files
  - Microsoft SQL Server VSS Writer
- Next, you will remove the Rediscovery Proficio SQL program. **Note:** Do not manually remove the Rediscovery Proficio SQL folder without going through the uninstall process. Doing so will create errors and the program will be unable to uninstall properly.

***WARNING: If this is a standalone installation, removing this program will also delete all databases which include your catalog data. These are not retrievable once deleted.***

- In the Programs and Features list, select Rediscovery Proficio SQL 8.20 and click Uninstall.
- You may get a message that the program was unable to delete the Query Express folder. Click OK. The majority of the program files will be deleted. You will have to manually delete the C:\Program Files (x86)\Rediscovery Software Inc\Rediscovery Proficio SQL folder.
- Next, you will remove the Rediscovery Proficio Workstation 8.20 program. Using Programs and Features in Control Panel select Rediscovery Proficio Workstation 8.20 and click Uninstall.
- If you do not plan to use this computer for Proficio in the future, you may also wish to uninstall Rediscovery Proficio Prerequisites.
- Then delete the entire C:\Program Files (x86)\Rediscovery Software Inc\ folder.

3. *How do I uninstall ICMS SQL server components using an existing instance of SQL Server?*

To uninstall the ICMS SQL Server Component installation, go to the Windows Control Panel and choose Programs and Features. In the programs list, uninstall these components in this order:

- Rediscovery Proficio SQL 8.20
- Rediscovery Proficio Workstation 8.20

**Note:** Do not delete the Rediscovery Proficio folder without going through the uninstall process. Doing so will create errors and the program will be unable to uninstall properly.

***WARNING: You should make a backup of your data directories before removing the program.***

- In the Programs and Features list, select Rediscovery Proficio SQL 8.20 and click Uninstall.
- You may get a message that the program was unable to delete the Query Express folder. Click OK. The majority of the program files will be deleted.
- Next, you will remove the Rediscovery Proficio Workstation 8.20 program. Using Programs and Features in Control Panel select Rediscovery Proficio Workstation 8.20 and click Uninstall.
- If you do not plan to use this computer for Proficio in the future, you may also wish to uninstall Rediscovery Proficio Prerequisites.

Then delete the entire C:\Program Files (x86)\Rediscovery Software Inc\ folder.



4. *How do I uninstall the Workstation installation for ICMS?*

Uninstall the workstation using Programs and Features from Control Panel.

To remove the workstation using Programs and Features:

- Click Start on the Windows Task Bar and choose Control Panel.
- Choose Programs and Features.
- Scroll down the list of programs and select the Rediscovery Proficio Workstation 8.20 program.
- Click Remove.

You may also wish to remove the Rediscovery Version8.0 Prerequisites through Programs and Features and then delete the entire C:\Program Files (x86)\Rediscovery Software Inc folder.