Setup and Reconfiguration Guide
About this book:

This book describes how to upgrade EPIC from a previous version of the product as well as initialise a fresh system and how to reconfigure EPIC at a later date.

Who this book is for:

The book is intended for readers with technical knowledge of EPIC and a general understanding of computer systems.

What you need to use this book:

There are no prerequisites to this publication.

Related Publications:

Installation Guide       VM-0001-03
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1 Introduction

The Setup Wizard is a tool which is be used to configure fundamental aspects of an EPIC installation. This wizard can be used to migrate settings and data from an earlier product version into a newly installed EPIC product.

The wizard is used as part of the installation process to initially set up the EPIC database and directories, but also can be re-run at any point following installation to re-configure the database, data directories, and other aspects of the EPIC installation.
2 Concepts and Terms

2.1 Program Files and Application Data

The Program Files directory, along with the Application Data directory, is set up during the installation of EPIC. For more information about these directories, please refer to VM-0001-03 Installation and Initialisation Guide.

2.2 Data Directories

‘Data directories’ refers to the directories which are used to store data files. A data file is the physical file on disk that is transferred to or from your EPIC system. These directories need to be accessible for EPIC to read and write to and from at all times.

In EPIC, two data directories are defined during the Setup Wizard: Common Data directories and Archive Data directories. The Common Data directory is used to store data files relating to the main EPIC database. The Archive Data directory is used to store data files relating to the optional archive database.

The location of these data directories is dependent upon the operating system being used.

For Windows XP:

C:\Program Files\DIP\EPIC\x.x.x.x\Common Data

C:\Program Files\DIP\EPIC\x.x.x.x\Archive Data

For Windows Vista:

C:\ProgramData\DIP\EPIC\x.x.x.x\Common Data

C:\ProgramData\DIP\EPIC\x.x.x.x\Archive Data

2.3 Main Database

‘Main Database’ refers to the database which is used by EPIC to store configuration information, such as Trading Partners, Networks, Mailboxes, Workflows, etc. and data files exchanged in the EPIC system.

2.4 Archive Database

‘Archive Database’ refers to a separate database used to store data files that have been archived. It is possible to periodically archive data files which are of a certain age, to reduce the amount of data in the live EPIC system. These archived files can be contained with the same main database, or moved to a separate database, which is termed a separate Archive Database.


2.5 Database Naming Convention

A database that is created with a default name will be named in the style EPIC_x.x.x.x, where x.x.x.x is the version and build of the current installation.

This database will be located, by default, on the DIP003 instance of the local machine.

An archive database is created with a default name of EPIC_x.x.x.x_Archive.

Database Upgrade Terms

‘Settings’ and ‘configuration’ refers to database items such as Workflows, Trading Partners, Networks, Mailboxes, etc. An upgrade procedure that is without data will copy all of these settings to the new database.

‘Data’ in the database refers to all transmitted files to and from your EPIC system. This data is visible in the Postbag Workstation. An upgrade that is with data will copy all of this data to the new database, as well as the settings and configuration.
3 Initialisation

Once EPIC has been installed, the Setup Wizard is run to initially set up the new EPIC installation. Two options (shown in Wizard Page Error! Reference source not found.) are presented. A user can either install a Fresh system, or Upgrade the system from an earlier version.

Each of the following sections describes a possible initialisation path that you could take through the wizard, with reference to each of the different wizard pages which are defined in section 0.

3.1 Fresh System

If you selected “Start with a fresh system”, then initialisation of a clean EPIC installation is carried out by the Setup Wizard.

3.1.1.1 Fresh system with non-advanced options

If you selected this option, default locations are used for the database and data files, and the following wizard pages will be shown:

- Product Initialisation Options (6.1)
- Summary Page (6.13)
- Process Page (6.14)

3.1.1.2 Fresh system with advanced options

If you selected this option, custom settings for the database and data directories will be used for the fresh installation. The following wizard pages will be shown to obtain these custom settings:

- Product Initialisation Options (6.1)
- Configure a New Database Page (6.8)
- Data Files Locations Page (6.9)
- Summary Page (6.13)
- Process Page (6.14)
3.2 Upgrade from an earlier version

If you selected ‘Upgrade from an earlier version”, then initialisation of EPIC involves upgrading information from an earlier compatible product version. This involves searching your system for an earlier compatible version, and upgrading all configuration information that you have set up and optionally data that you have transferred in that earlier version.

3.2.1.1 Upgrade with non-advanced options

If you selected this option, default locations are used for the database and data files, as well as default upgrade options. Default upgrade options involve upgrading all data and settings from the database associated with the earlier product version, as well as copying all data files into the new Common Data directory.

The following wizard pages will be shown:

- Product Initialisation Options (6.1)
- Earlier Product Version Page (6.3)
- Summary Page (6.13)
- Process Page (6.14)

3.2.1.2 Upgrade with advanced options

If you selected this option, custom locations are used for the database and data files, as well as custom upgrade options. Custom upgrade options involve choosing the kind of information and data to upgrade from the earlier product version, and how to upgrade it.

The following wizard pages will be shown:

- Product Initialisation Options Page (6.1)
- Earlier Product Version Page (6.3)
- Main Database Options (6.4)
- *Optional*: Create a New Main Database Page (6.8)
  
  This page is optional because it will not be displayed if you chose to upgrade an existing database.

- *Optional*: Archive Database Options Page (6.6)
  
  This page is optional because it will not be displayed if an archive database is not detected in the earlier product version to upgrade from.
- Optional: Create a New Archive Database Page (6.8)

   This page is optional because it will only be shown if an option has been chosen to create a new archive database. An archive database is not needed to initialise the new EPIC installation.

- Data Files Options (6.9)

- Data Files Locations Page (6.9)

- Summary Page (6.13)

- Process Page (6.14)
4 Reconfiguration

At any point following the initial set up of EPIC, the Setup Wizard can be re-run to reconfigure your EPIC installation.

There are five different reconfiguration processes that can be carried out by this wizard, and these are presented as options when the Setup Wizard is run (shown in Wizard Page 6.2).

Each of the following sections describe a possible reconfiguration process that you could carry out using the wizard, with reference to each of the different wizard pages which are defined in section 0.

4.1 Full Upgrade

Following initial set up of EPIC, you may wish to start a Full Upgrade procedure from an earlier product version. This is permissible if just a Fresh initialisation was carried out following the installation of the new EPIC product.

4.2 Create a new Main/Archive Database

Following initial set up of EPIC, you may wish to change the main or archive database which is used by EPIC.

If you choose to create a new database, this will involve either creating a new empty database, or copying data from your existing database to your new database.

The wizard pages that will be displayed are the same for creation of either a main or archive database:

- Reconfiguration Options Page (6.2)
- Reconfiguration Database Options Page (6.7)
- Create a new Database Page (6.8)
- Summary Page (6.13)
- Process Page (6.14)
4.3 **Change to a Different Existing Database**

Following initial set up of EPIC, you may wish to change the main or archive database which is used by EPIC.

If you choose to use a different database, you will be asked to select the location of this existing database.

The wizard pages that will be displayed are the same for selecting either an existing main or archive database:

- Reconfiguration Options Page (6.2)
- Reconfiguration Database Options Page (6.7)
- Select A Database Page (6.8)
- *Optional*: Select a Model Database Page (6.5)
  
  This page is optional because it is not required if you choose to let the Setup Wizard create and delete its own model database.

- Summary Page (6.13)
- Process Page (6.14)

4.4 **Reconfigure Data Directories**

Following initial set up of EPIC, you may wish to change the locations of data directories. You may also wish to change to new empty data directories. This reconfiguration process allows you to carry out both of these tasks.

The wizard pages that will be displayed are as follows:

- Reconfiguration Options Page (6.2)
- Reconfiguration Data Files Options Page (6.10)
- Data Files Locations Page (6.9)
- Summary Page (6.13)
- Process Page (6.14)

4.5 **Reconfigure Server Application/Service**

During installation of the EPIC product, you could choose to install the EPIC server as either a Windows Application or a Windows Service. The Setup Wizard allows you to
reconfigure the server to run as either of these options at any time following the initial selection during installation.

The following wizard pages will be shown:

- Reconfiguration Options Page (6.2)
- Application/Service Reconfiguration (6.12)
- Summary Page (6.13)
- Process Page (6.14)
5 SQL Server Permissions

Different initialisation/reconfiguration processes requires different levels of permissions for connecting to an SQL server instance. For example, creating a new database requires more highly elevated permissions compared to simply choosing a pre-existing database to use.

The following sections detail the type of permissions that you may be prompted for throughout the wizard process, and what they mean.

5.1 Creating a Database

If at any point during the Setup Wizard you will be creating a new database, the SQL server user which is used to perform the creation must be a member of the ‘sysadmin’ SQL server role for the server on which the database is being created.

If the Setup Wizard already has the necessary username and password to perform this action, a dialog won’t appear prompting you for elevated credentials. If the Setup Wizard needs to ask for elevated credentials, the dialog as shown in section 6.8 will appear.

The following initialisation/reconfiguration scenarios require creation of a new database:

- Fresh installation
- Full Upgrade from a previous product version
- Full Upgrade using a pre-existing database, and creating a model database insitu
- Reconfiguration of the main/archive database

5.2 In-Place Upgrade

If at any point during the Setup Wizard you will be carrying out an in-place upgrade (upgrading an existing database to work with a newer product version) then the SQL server user which is used to perform the upgrade must be a member of the following database roles: ‘db_datareader’, ‘db_datawriter’, ‘db_dldadmin’.
The following initialisation/reconfiguration scenarios require an in-place upgrade:

- Initialisation upgrade of a pre-existing database
- Reconfiguration process to use a database from an earlier product version

## 5.3 Backup of a Database

If at any point during the Setup Wizard a backup operation will be performed, the SQL server user which is used to perform the creation must be a member of the ‘db_backupoperator’ database role for the database which will be backed up. Backup operations back up a database to a disk file.

The following initialisation/reconfiguration scenarios require a backup operation:

- Upgrade using a pre-existing database, where a backup location is entered.

## 5.4 Summary of Required Permissions

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<tr>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>db_datareader</td>
</tr>
<tr>
<td></td>
<td></td>
<td>db_owner</td>
</tr>
</tbody>
</table>
6 Wizard Pages

6.1 Product Initialisation Options Page

This wizard page is shown once the Setup Wizard starts following initial installation of the product. It presents options for initialising the EPIC installation.

- **Start with a fresh system**
  
  Initialising with a fresh system creates an empty database and empty folders for storing data files. This does not upgrade any settings from an earlier version.

- **Upgrade from an earlier version**
  
  An upgrade initialisation creates a new database and populates this database with settings and/or data from an earlier product version. Data files on disk are also upgraded from the chosen earlier product version.

- **Advanced Options**
Enabling advanced options allows custom settings to be defined for the location of the database and data files. Disabling advanced options uses default locations.

### 6.2 Reconfiguration Options Page

This wizard page is shown when the Setup Wizard is run at any point following the initial set up of EPIC. Five options are presented that allow the EPIC installation to be reconfigured in different ways.

![Reconfiguration Wizard Main Page](image)

- **Full Upgrade**

Selecting this option will begin the upgrade procedure that can be carried out during the initial set up of the EPIC installation.

Note: This option is not available if a Full Upgrade procedure has been carried out previously for this EPIC installation. This option will only be selectable if the product was originally initialised as a fresh system.

- **Reconfigure the main database**

  This option allows changes to be made to the main database associated with the EPIC installation. A new database can be created (optionally upgrading from the current database), or the EPIC installation can be pointed to a different main database which already exists on an SQL instance.

- **Reconfigure/create an archive database**

  If an archive database is already associated with this EPIC installation, then the option to reconfigure the archive database is shown. The options presented are the same for reconfiguration of the main database.
If an archive database is not yet associated with this EPIC installation, then the option to create an archive database is presented. This creates a new empty archive database.

- Reconfigure the data directories

This option allows reconfiguration of the Common Data and Archive Data directories. The directories can be copied to new locations, or new empty directories can be created.

- Reconfigure the server application/service

If the EPIC server is currently set up to be used as an application (it is not installed as a Windows service) then the EPIC server can be installed as a service by selecting this option.

If the EPIC server is currently set up to be used as a Windows service, then the service can be uninstalled by selecting this option.

### 6.3 Earlier Product Version Page

This wizard page is shown if you have chosen to upgrade data and information from an earlier product version which is already installed on your system. The Setup Wizard will search your system for previously installed products which are compatible with the upgrade procedure for this EPIC installation. This search can take up to a minute depending on the number of earlier versions installed on your system. Once all compatible versions are found, they are presented in the following way:

![Earlier Product Version Page](image)

*Figure 3 – Database Location Page*
An earlier product version must be selected from the list before the next wizard page can be shown.

6.4 Main Database Options Page

This page presents the different options for how the main database should be upgraded.

- Upgrade to a new database (with data)

This option creates a new main database for the new EPIC installation, and copies all settings and data from the main database which is associated with the earlier product version. The result of such an upgrade is that the new EPIC installation will contain all of the information contained within the earlier main database.

- Upgrade to a new database (without data)

This option creates a new main database for the new EPIC installation, and copies only settings from the main database which is associated with the earlier product version. This means that only settings such as Trading Partners, Networks, Mailboxes, etc. are copied to the new database, and file data is not copied. The result of such an upgrade is that the new EPIC installation will be configured in the same way as the earlier product version, but without any of the data files transferred to or from the earlier system.

- Use the existing database

This option does not create a new main database, but instead upgrades the main database associated with the earlier product version. This upgraded database is then used as the main database for the new EPIC installation.
Note: following this procedure the database will be unusable with the earlier product version. As a result, the database must first be backed up to a file on disk so that it may be restored if required.

To upgrade an existing database in-place, a model database is needed which allows the old database to be compared to the new database structure. By default, the Setup Wizard creates this model database as it needs and deletes it at the end of the upgrade procedure. However, there is also the option to use a pre-existing model database, in a situation where it is not possible to create a new database. This option is achieved by checking the ‘Use an existing model database’ check box. The existing model database must be on the same SQL instance as the existing database to be upgrade, as well as the same SQL credentials to access it. Section 6.5 shows an example of a page used to select a model database.

6.5 Model Database Location Page

This page will be used to obtain the name of a pre-existing model database which exists on the same SQL instance as the database to be upgraded.

![Figure 5 – Model Main Database Location](image)

6.6 Archive Database Options Page

This wizard page presents options for upgrading an archive database. This page will only be visible if an archive database has been detected in the earlier product version.
Upgrade the archive database now

If this checkbox is checked, then additional options for upgrading the archive database will be presented below it. If left unchecked, the archive database associated with the earlier product version will not be upgraded to the new product version.

Create a fresh new empty database

Selecting this option will create an empty archive database for the new EPIC installation, and associates it with the new EPIC installation. No archive data is upgraded into this new database.

Upgrade to a new database

Selecting this option will create an archive database for the new EPIC installation, and upgrade all data associated with the archive database of the earlier product version.

Use the existing database

This option does not create a new archive database, but instead upgrades the archive database associated with the earlier product version. This upgraded database is then used as the archive database for the new EPIC installation.

Note: following this procedure the database will be unusable with the earlier product version. As a result, the database must first be backed up to a file on disk so that it may be restored if required.

To upgrade an existing database in-place, a model database is needed which allows the old database to be compared to the new database structure. By default, the Setup Wizard creates this model database as it needs and deletes it at the end of the upgrade.
procedure. However, there is also the option to use a pre-existing model database, in a situation where it is not possible to create a new database. This option is achieved by checking the ‘Use an existing model database’ check box. The existing model database must be on the same SQL instance as the existing database to be upgrade, as well as the same SQL credentials to access it. Refer to 6.5 for an example of this wizard page.

6.7 Reconfiguration Database Options Page

This wizard page will be presented if you choose to reconfigure either the main or archive database associated with your EPIC installation.

![Figure 7 – Reconfiguration Main Database Options](image)

![Figure 7 – Reconfiguration Archive Database Options](image)
6.8 Configure a New Database Page

The new database location page allows the location for a new database to be defined, including SQL login details for access by EPIC.
If the Database name is entered for a pre-existing database on the SQL instance, then the option is presented to a) Overwrite the database, or b) Use this existing database.

Overwriting the database deletes the database and replaces it with a blank one corresponding to this product version. Alternatively, choosing to use the pre-existing database checks that the database is compatible with this product version, and then associates it with the current product version without changing it.

- **SQL instance**
  
The SQL instance is the SQL server instance on which the new database should be created.

- **Database**
  
The database field should be populated with the required name for the new EPIC database. This field is populated with the default database name initially.

- **Login options**
  
  This combo box allows selection of login options for this database. These login options will be used by EPIC to access the database on a day-to-day basis. If a new login and password is required for accessing the database using SQL Server Authentication, then a new login and password should be entered in the Login and Password field. If the database should be accessed using a pre-existing login and password for SQL Server Authentication then this login and password should be entered. If no additional login options are required, then the database will be accessed using Windows integrated security or the default SQL login and password.

- **Create a separate archive database**
This option will appear for the case of a Fresh Installation, or an Upgrade from an earlier product version in which an earlier archive database is not detected to upgrade from.

This option, when checked, allows a new separate archive database to be created during this initialisation process. Clicking the ‘Next’ button will present an identical page to the current wizard page, whereby the details for the new archive database can be entered.

When clicking ‘Next’, the Setup Wizard will attempt to connect to the SQL instance defined. The default SQL server credentials will attempt to access the instance, and if access cannot be gained, the following dialog will display:

![Figure 10 – SQL Credentials Dialog](image)

### 6.9 Data Files Options Page

This wizard page allows custom options to be specified for upgrading of Common Data and Archive Data directories. The options presented will depend on earlier decisions made in the wizard.

![Figure 11 – Data Files Location Page](image)
- Create new empty directories...

Selecting this option will create new and empty data directories for the EPIC installation.

- Copy to new directories...

This option will upgrade data files associated with the earlier product version from the earlier data directory into the data directory associated with the new EPIC installation.

- Use the existing data directories

This option will not create new data directories, but instead associate the data directories of the earlier product version with the new EPIC installation. This option will only be presented if the earlier product version has a compatible data directory structure.

### 6.10 Reconfiguration Data Files Options Page

This wizard page is presented when you run the Setup Wizard following the initial installation of the EPIC product. There are options presented to copy the Common Data and/or Archive Data directories to a new location, or create new empty Common Data and/or Archive Data directories.

![Figure 12 – Reconfiguration Data Files Options Page](image)

- Create new empty data directories
Selecting this option creates new and empty Common Data and/or Archive Data directories and associated them with the EPIC installation. This is useful if a new empty main or archive database has been reconfigured against the EPIC installation.

- Copy existing data to new directories

Selecting this option copies the existing Common Data and/or Archive Data directories to a new location, and associates the new locations with the EPIC installation.

By checking or not checking the check boxes, you can choose to reconfigure either the Common Data or Archive Data directories, or both of them.

### 6.11 Data Files Locations Page

This wizard page allows new directory locations to be defined for the Common Data and Archive Data.

- New common data directory...

This field defines the custom location for the Common Data directory.

- New archive data directory...

This field defines the custom location for the Archive Data directory.

Certain directories, or combinations of Common Data and Archive Data directories, are not acceptable. These include the following:
- Common Data and Archive Data directories are separate entities which can be moved to different locations independently of each other. As a result, one directory cannot be a sub-directory of another.

- As a consequence of the ability to move these directories to different locations, new data directory locations cannot point to directories that already contain data.

### 6.12 Application/Service Reconfiguration

This wizard page tells you whether the server is currently installed as a Windows Service, and shows the option to install or uninstall the service accordingly.

![Figure 14 – Application/Service Reconfiguration Page](image)

- Run the server as a Windows Application

  Selecting this option installs the EPIC Server Windows Service if it is not currently installed.

- Run the server as a Windows Service

  Selecting this option uninstalls the EPIC Server Windows Service if it is currently installed.

### 6.13 Summary Page

The summary wizard page shows a summary of the processes that will be carried out by the Setup Wizard when the ‘Next’ button is clicked.
A heading is shown in the summary panel for each type of process that will be carried out. The above example shows that a new main database will be created, along with new Common Data and Archive Data directories. The above summary represents a Fresh installation.

On clicking the ‘Next’ button the summarised processes are carried out.

### 6.14 Process Page

The process page is always the last page in the series of wizard pages. The page carries out the necessary processes to initialise or reconfigure the product, showing progress in on the page using the progress bar and the main view.
Upon completion, a ‘Finish’ button can be clicked, which closes the Setup Wizard.