

### OVERVIEW:

FileBound Version 5 is a redesigned and improved version of FileBound that has been built entirely using the Microsoft .NET development platform. This new platform allows the FileBound Content Management System to be more efficient and allow for easier integration with core business applications. With the introduction of FileBound Version 5 the Marex Group has designed version 5 and version 4.03.001 to be used simultaneously in a “Dual Mode” operation. This will allow organizations to adopt the new version 5 interface and functionality on an as needed basis and maintain the familiar functionality that they currently are using.

Many of the features that FileBound users have become familiar with have been included in FileBound V5 and some new functionality has been introduced to help users become more efficient when searching for and viewing files and documents. FileBound 4 has many features available to users. Some of these features are not used as much as other features. Because of this fact, FileBound 5 currently does not yet have every feature available that is available within FileBound 4. Future versions of FileBound 5 will include more of these features. Some features have also been replaced with new functionality. This is one of the reasons that the Dual Mode operation has been developed.

FileBound 4.03.001 will first need to be installed or an upgrade performed on the FileBound V4 server to get the server to version 4.03.001. The V5 server installation process is still very similar but changes have been made to the System Configuration Wizard that allow for installation of new databases and upgrading existing databases.

### REQUIREMENTS:

#### ***FileBound Version 4.03.001***

When performing the Dual Mode installation the FileBound server will need to have FileBound Version 4.03.001 installed. FileBound 4.03.001 and 5.0 utilize the same database structure and schema and allow for both versions to access the same database and document storage location.

#### ***Microsoft .NET 2.0 Framework***

FileBound 5.0 utilizes a new document viewer that is now installed differently than the Active X control version used in FileBound 4. FileBound Version 5.0 requires the Microsoft .NET Framework 2.0 be installed on the machine. For more information about the .NET Framework 2.0 visit the following sites: <http://www.microsoft.com/net/default.aspx>  
<http://www.microsoft.com/net/basics.msp>

### DUAL MODE INSTALLATION PROCEDURE

#### **Step 1 – Install/Upgrade to FileBound 4.03.001**

Determine which version of FileBound is installed on the server, the server will need to have FileBound 4.03.001 installed. Complete FileBound V5 installation instructions can be downloaded at <http://downloads.marexgroup.com/Documentation/SetupandConfig/FB-InstallationManual-4.03.001.pdf>. If the server only needs to be upgraded, directions can be downloaded at <http://downloads.marexgroup.com/Documentation/SetupandConfig/FB-Upgrade.pdf>.

### Step 2 – Run FileBound 5.0 Installer

The FileBound 5.0 installer will need to be run to perform the installation. The installer can be downloaded at <http://downloads.marexgroup.com/FileBoundV5/Installers>. The installer will need to be extracted from the ZIP file before being used. The installer can be started by double-clicking **setup.exe** in the extracted directory. The installer will start and prompt the user to answer several questions during the installation. Complete FileBound V5 installation instructions can be downloaded at <http://downloads.marexgroup.com/Documentation/SetupandConfig/FB-InstallationManual-V5.pdf>

### Step 3 – Select to Install Server Files and Database & Demo Installation Files

While moving through the server installation screens you will be asked what should be installed. You will need to make sure that the checkboxes are selected to install the **Server Files and Database & Demo Installation Files** then click **Finish**. Once the installation has finished successfully you will receive a message stating the installation is complete and that the System Configuration Wizard will need to be run to setup the database.

### Step 4 – Launch the System Configuration Wizard

The System Configuration Wizard is installed with the FileBound server. To start the wizard, click the **Start** button, and then point to **All Programs**. Point to **FileBound**, and then click **System Configuration Wizard**. The wizard contains all of the options necessary to configure a new FileBound database or to upgrade an existing database. The wizard is also used to specify the document storage location. If FileBound is being upgraded the document storage location will not need to be edited.

### Step 5 – Select Options within System Configuration Wizard

You will need to select the options to tell the wizard what to do with the FileBound database. You will need to select **Update Web Configuration File** and **Upgrade FileBound Database**. This will perform an upgrade to the FileBound 4.03.001 database that is currently being used. This will also update the web configuration file that FileBound uses to handle the database connection information.

### Step 6 – Specify Database Settings

Verify that the database information that is displayed is correct for the FileBound database that is currently being used for FileBound 4.03.001, this is the database that will be upgraded. Correct this information if necessary.

### Step 7 – Verify Information and Run the System Configuration Wizard

Verify that the Document Storage Location is the same that was used for the FileBound 4.03.001 installation. You should not need to edit the information within the Document Storage Location. Double check the settings in the wizard, after confirming that all the settings are correct click **Upgrade**. The wizard will start the process of upgrading the database and the web config file. The bottom bar of the wizard window will display the status of the upgrade process. When the process is complete you can close the wizard window.

### Step 8 – Finished

FileBound Version 5.0 is now installed and the database and web configuration file have been updated. The FileBound server is now setup to have Version 4.03.001 and 5.0 access the same files and documents using each version. FileBound Version 5 can be accessed by adding “/v5” at the end of the FileBound 4 URL. (e.g. <http://localhost/v5>)