Administrator's Guide to deploying Engagement across multiple computers in a network using Microsoft Active Directory

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Deploying ProSystem fx Engagement across computers in a domain

Overview

This document will help you deploy (or push) ProSystem *fx* Engagement across multiple computers in a network using Active Directory. A Microsoft Windows Server, with Microsoft Active Directory, may be used to push the SQL Express 2005 instance and the Engagement installation package to computers in a domain. When these computers are rebooted, SQL Express 2005 and Engagement Workpaper Management will be installed automatically. (**Note**: For additional information on Active Directory, please refer to your Microsoft operating system documentation.)

For computers that have a prior version of ProSystem *fx* Engagement installed, pushing SQL Express 2005 is not required, since those machines already have the Engagement SQL database instance. Only ProSystem *fx* Engagement version 5.0 and above are supported when upgrading the program.

Preparation

Before starting, please make sure that all computers to which Engagement will be deployed meet the following requirements, and have the following components installed:

1) Must be part of the Windows domain
2) Microsoft Word and Excel 2002 (XP) or higher
3) Microsoft .NET Framework version 3.5 SP 1
4) SQLXML 3.0 SP3
5) Microsoft Windows Installer 3.1
6) Microsoft SQL Server System CLR Types (32 bit)
7) Microsoft SQL Server 2008 Management Objects (32 bit)
8) Microsoft SQL Server 2008 Native Client (32 or 64 bit, depending on the operating system)
9) Microsoft Visual C++ 2005 Redistributable
10) Microsoft Visual C++ 2008 Redistributable x86 9.0.30729.17
11) Microsoft Visual C++ 2008 Redistributable x86 9.0.30729.4148
12) If Office 2007 is installed, Office 2007 Primary Interop Assemblies (PIA) and Visual Studio Tools for the Office System Runtime version 3.0 and Visual Studio Tools for the Office System 3.0 Runtime SP1 must be installed from the Applications folder on the installation CD.
13) Knowledge Tools functionality requires Microsoft Office 2003 Professional with Service Pack 2 or Office 2007 to be installed on all computers. In addition, Office 2003 Primary Interop Assemblies (PIA) and Visual Studio 2005 Tools for Office Second Edition Runtime (VSTOR) are required for Knowledge Tools. These two components may be installed from the Applications\Knowledge Tools Prerequisites folder on the installation CD. However, they may not be pushed to machines.
14) Machines must also meet the minimum requirements for ProSystem *fx* Engagement installation. Please refer to the Install Guide for these requirements located on the installation CD in the Documents folder.

Important Notes

- **For version 6.0, deployment of ProSystem *fx* Engagement using Active Directory is supported for all international versions.**

- **Deploying ProSystem *fx* Engagement across computers in a domain is a two step process that may require two separate pushes. For new installations, a separate push will be required to install a new SQL Express 2005 instance. The second push will be to install ProSystem *fx* Engagement Workpaper Management.**

- **Although an MSI file is provided which can be used to push the installation of SQL Express 2005, Microsoft does <u>not</u> support this method. The Microsoft SQL Express 2005 setup itself consists of multiple MSI installation files. Due to limitations with the Windows Installer, only one MSI file can be active at a time on a machine. The Active Directory deployment process cannot properly detect the processing status of the SQL Express 2005 MSI files, so its behavior is unpredictable. The only way to avoid this issue is to deploy the SQL Express 2005 installation, and wait until all processing has completed on all machines before deploying the Engagement Workpaper Management installation. This may take 30 minutes or more.**

- **For version 6.0, ProSystem fx Engagement supports either SQL Express 2005 or SQL Express 2008. Due to new limitations of the Microsoft SQL Express 2008 installer, it is not possible to use Active Directory to push the installation of SQL Express 2008. You may continue to install and use SQL Express 2005 with the steps provided in this document.**

Once all of the above requirements have been met, follow the instructions below to push SQL Express 2005 and ProSystem *fx* Engagement Workpaper Management across computers in a network, which are part of the domain, using Active Directory.

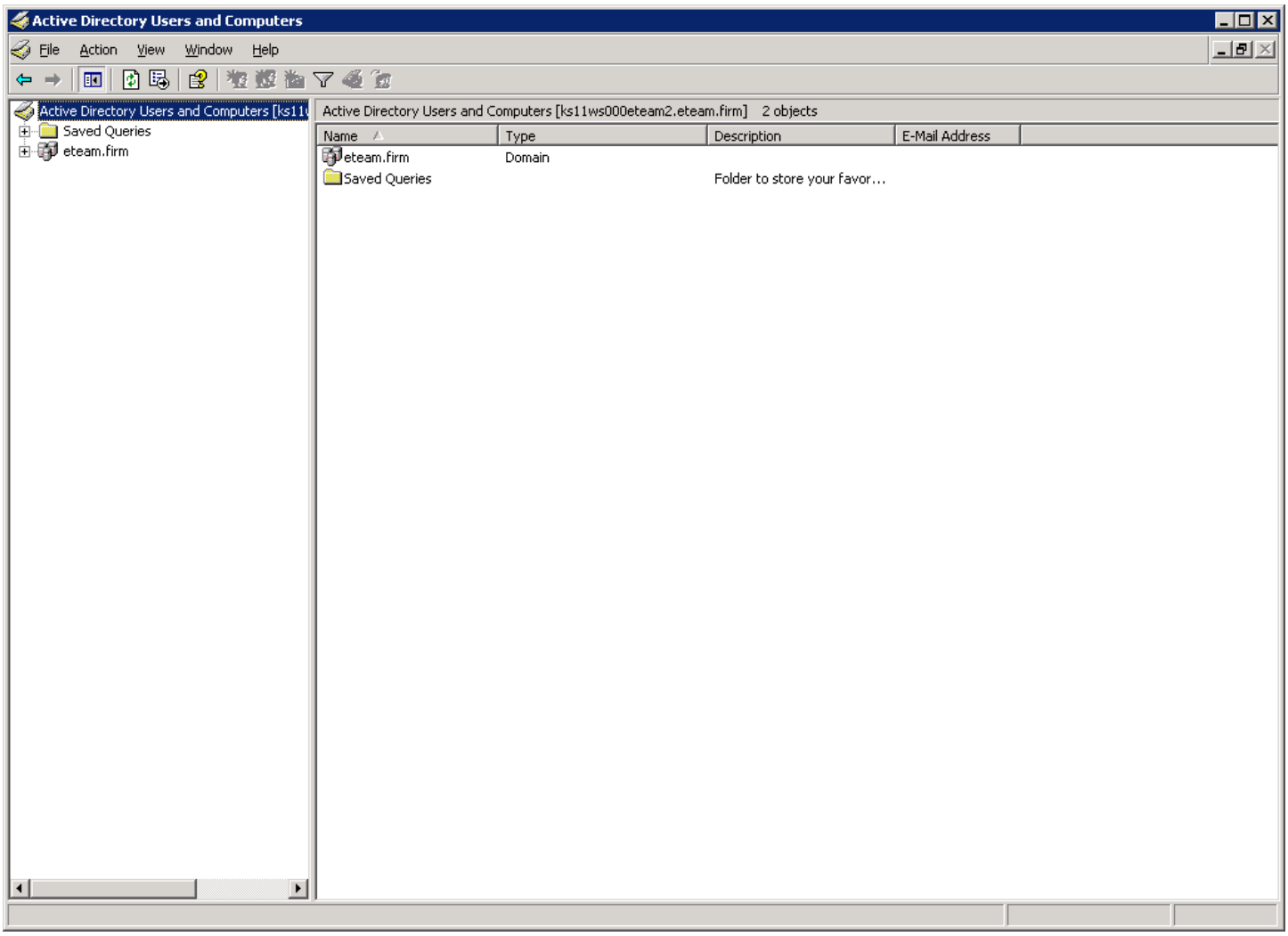
1) Log into a Microsoft Windows Server 2003 or Windows Server 2008.

2) Copy the **Engagement SQL Express Instance.msi** package from the Applications\SQL folder on the installation CD to a shared folder on the server's local drive. Make sure the security settings for this folder list Domain Computers with Full Control.

3) Copy the **ProSystem *fx* Engagement.msi** package from the installation CD to a shared folder on the server's local drive. Make sure the security settings for this folder list Domain Computers with Full Control.

4) From the server, select **Start**, then **All Programs**, **Administrative Tools** and **Active Directory Users and Computers**.

5) Active Directory Users and Computers screen is displayed.


Active Directory Users and Computers
File Action View Window Help
Active Directory Users and Computers [ks11
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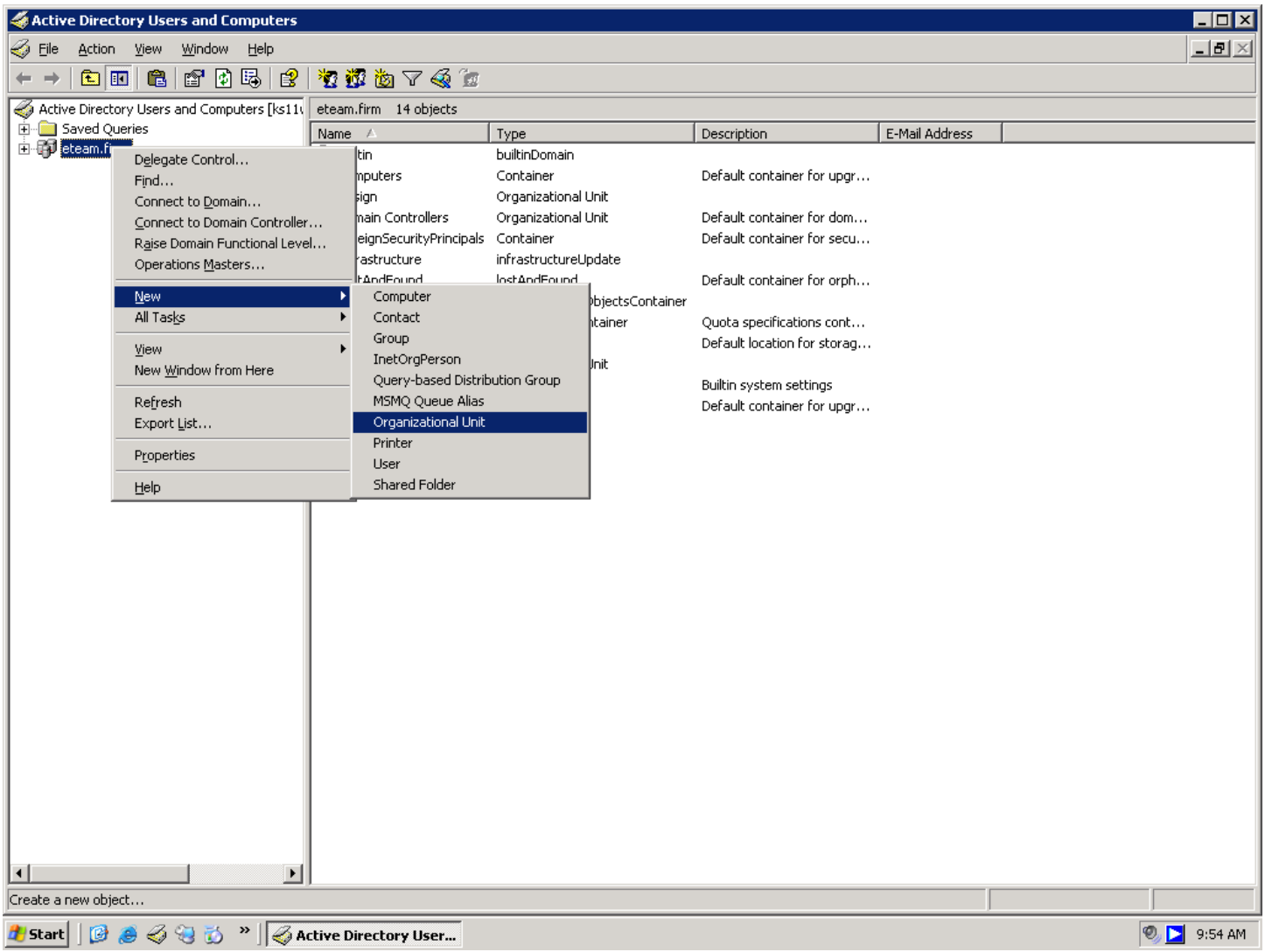
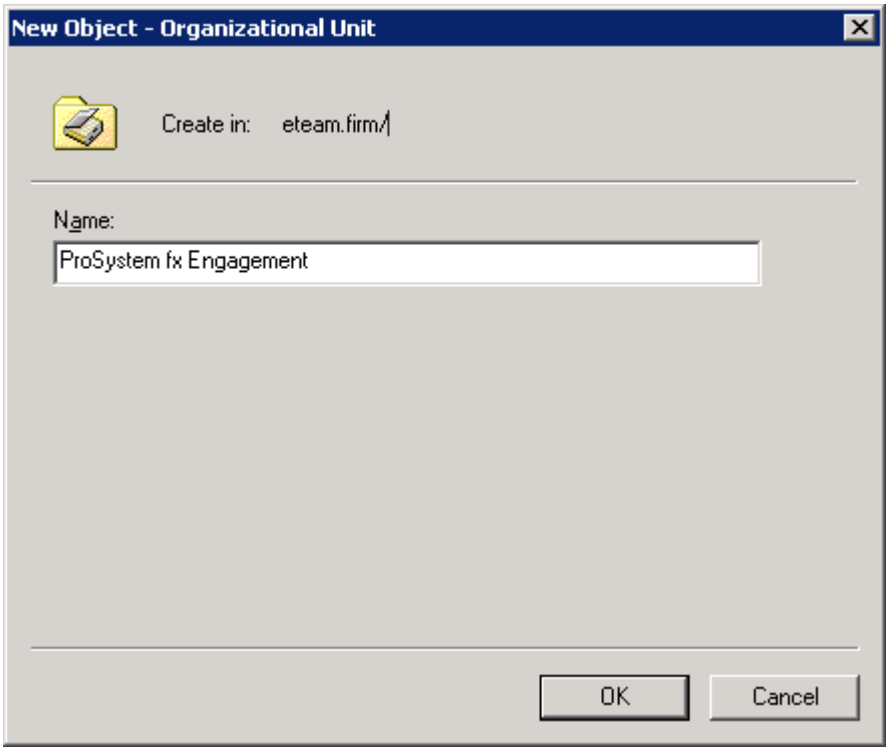
Active Directory Users and Computers [ks11ws000eteam2.eteam.firm] 2 objects
Name
Type
Description
E-Mail Address
eteam.firm
Domain
Saved Queries
Folder to store your favor...

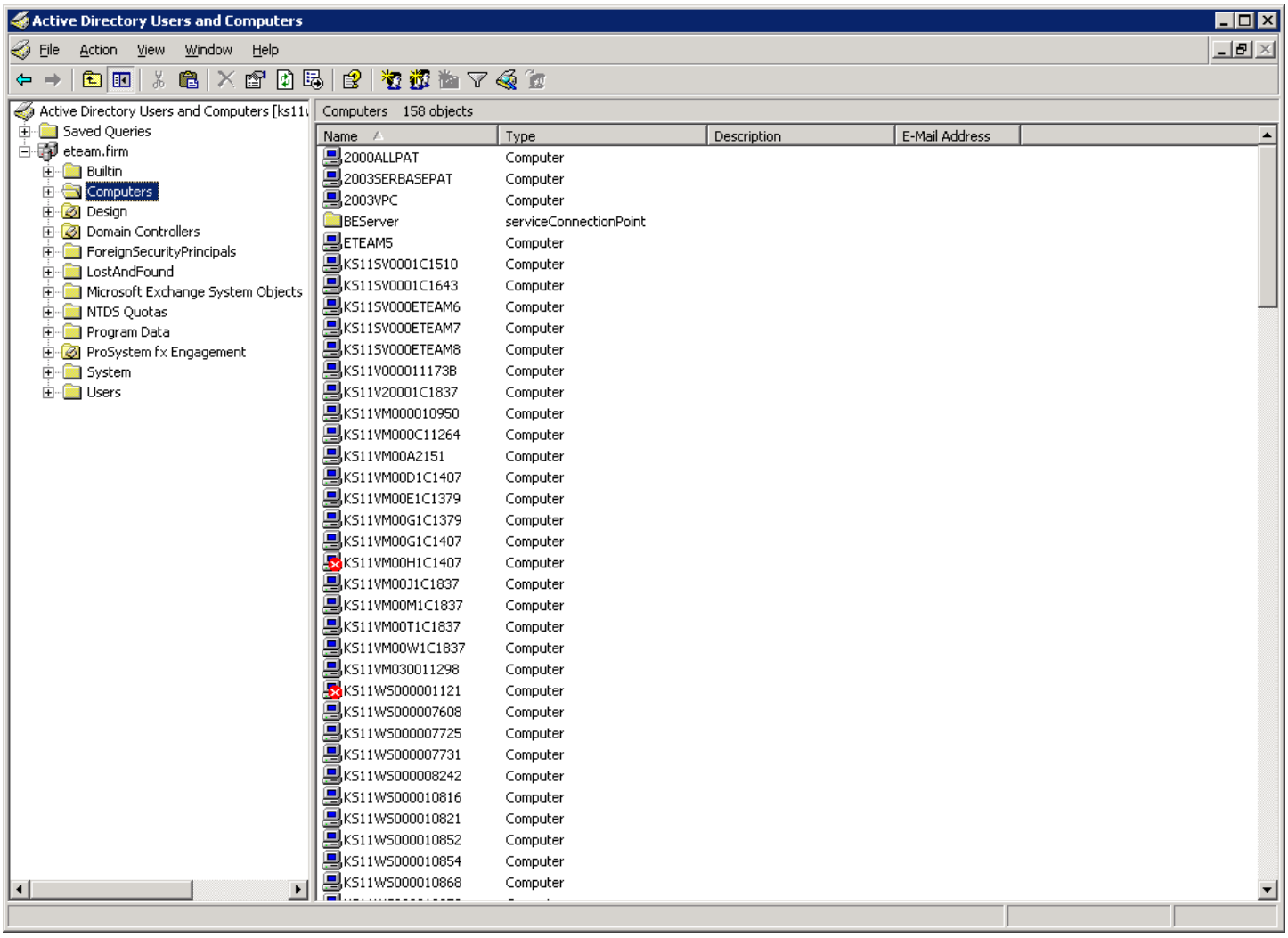
6) **Right-click** on the domain and select **New**, followed by **Organizational Unit** (**Note**: If you already have an Organizational Unit created under your domain which you will use here, skip to **step 8**.)



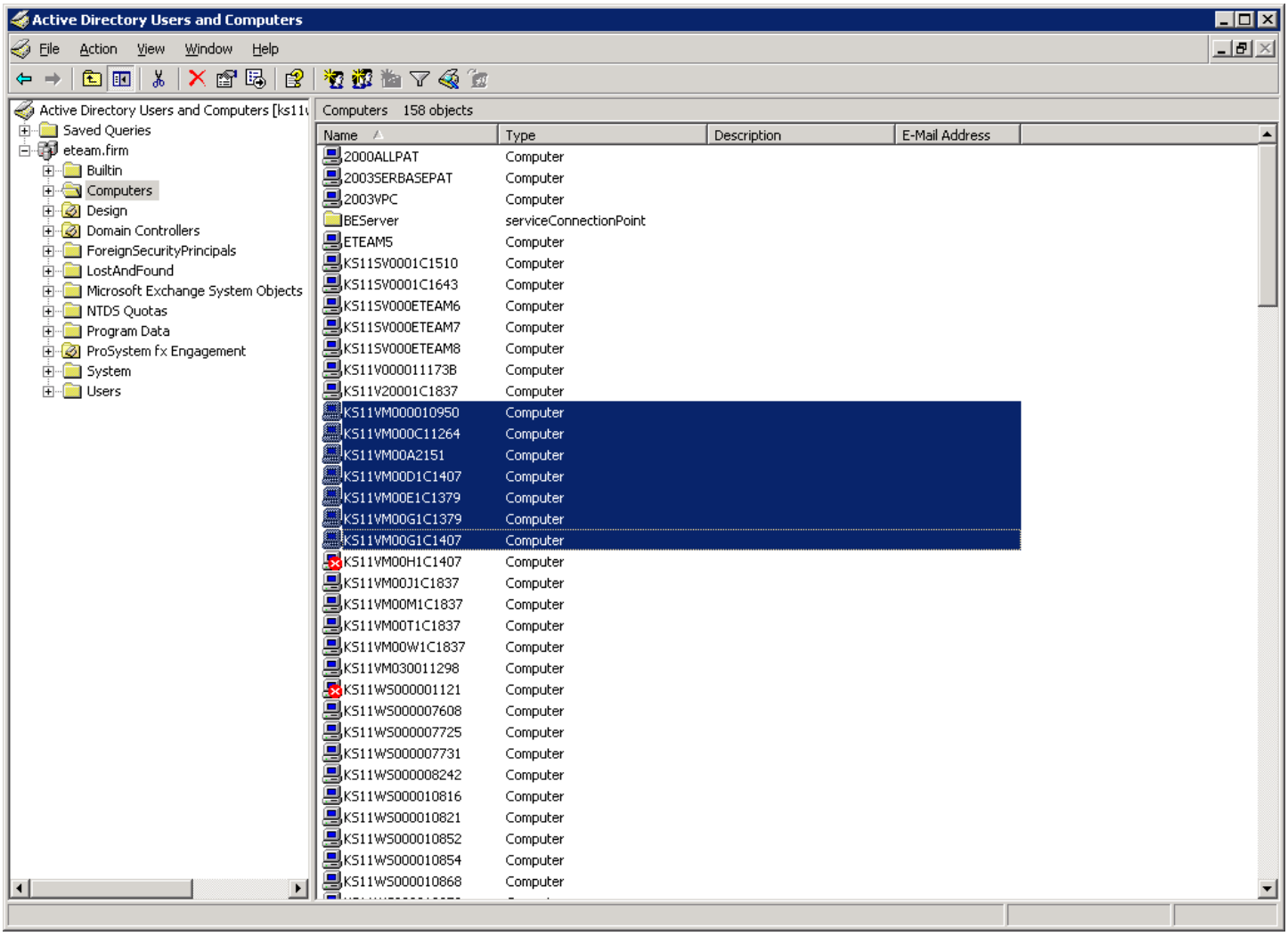
7) Enter a name for your Organizational Unit and click **OK**.



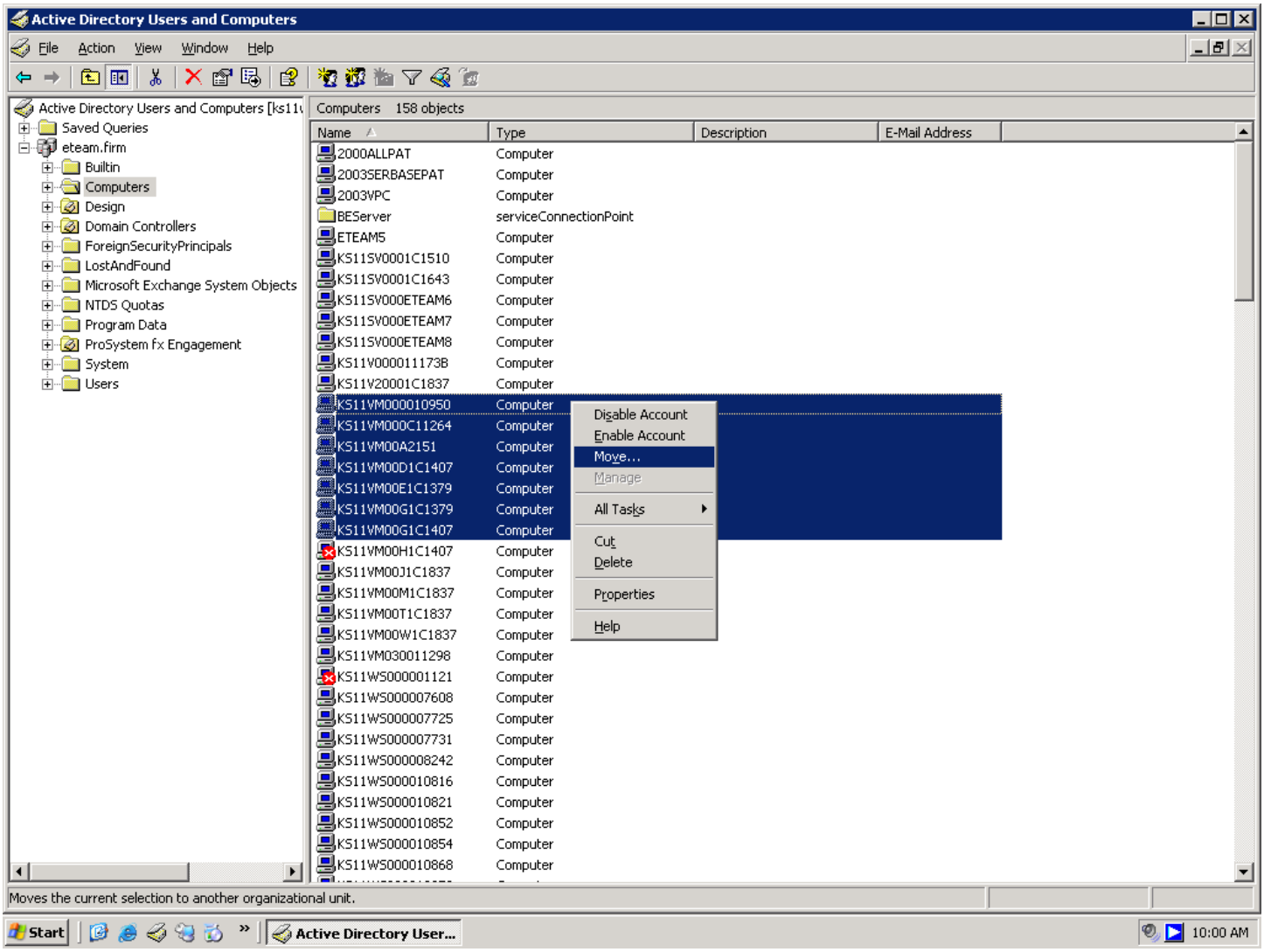
8) Under your domain, there is a folder called ‘Computers’. Highlight this folder which will display the list of all computers in this domain.



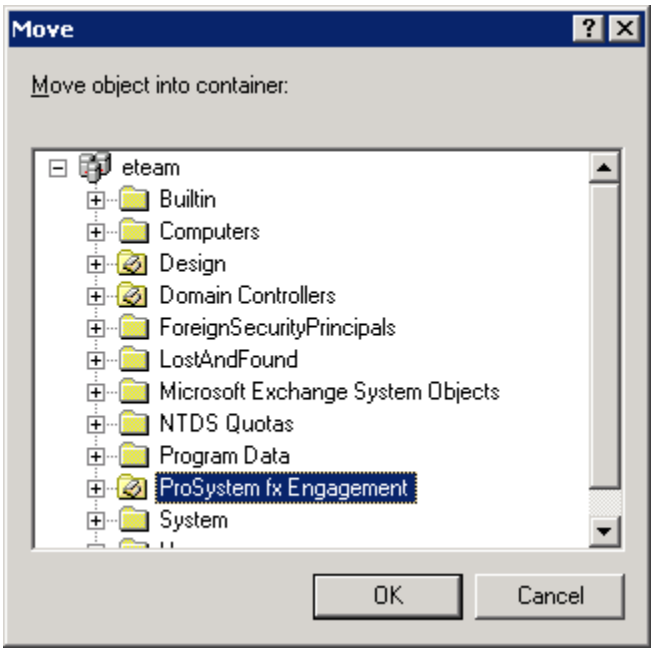
9) Highlight the computer(s) that you wish to deploy SQL Express and Engagement installation package to.



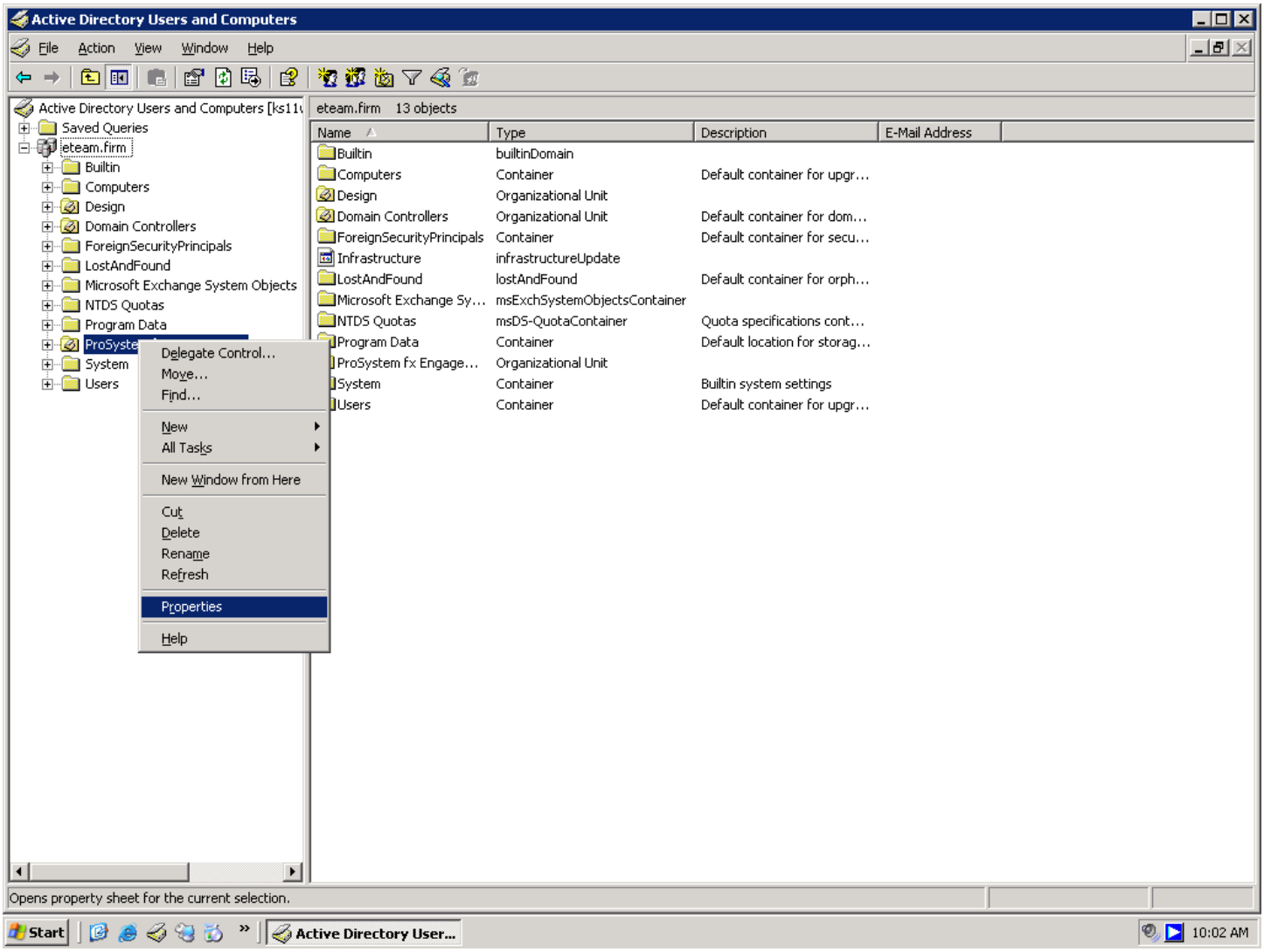
10) **Right-click** and select **Move**



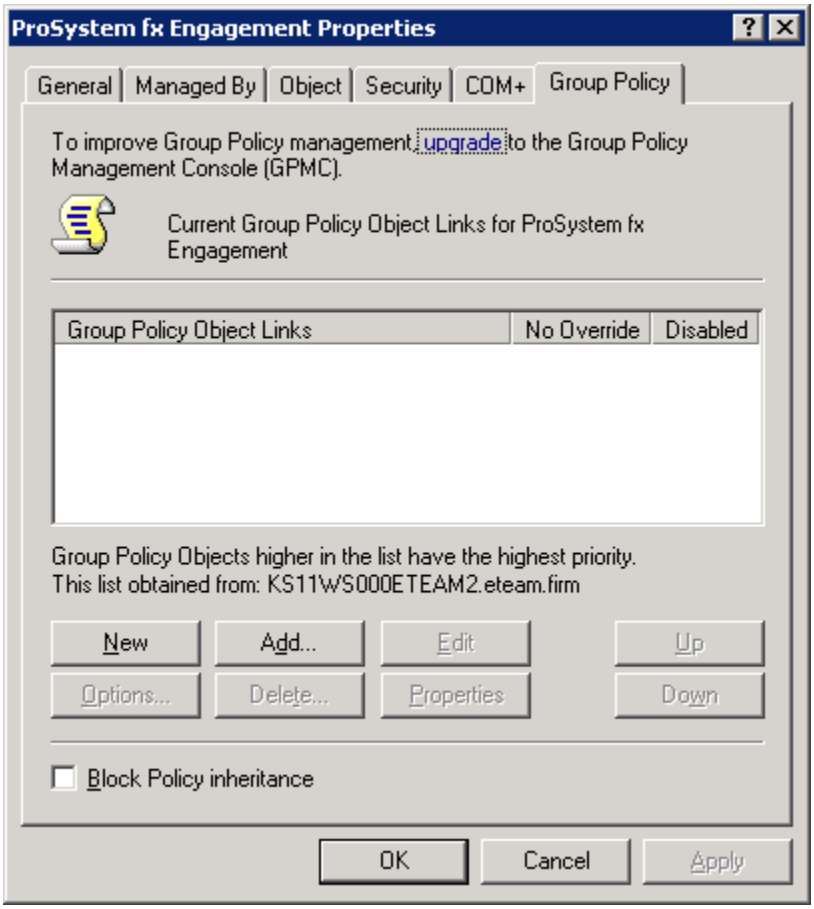
11) In the screen displayed, select the Organizational Unit that you had created in Step 7 and click **OK**. This will move all of the selected computers to your Organizational Unit.



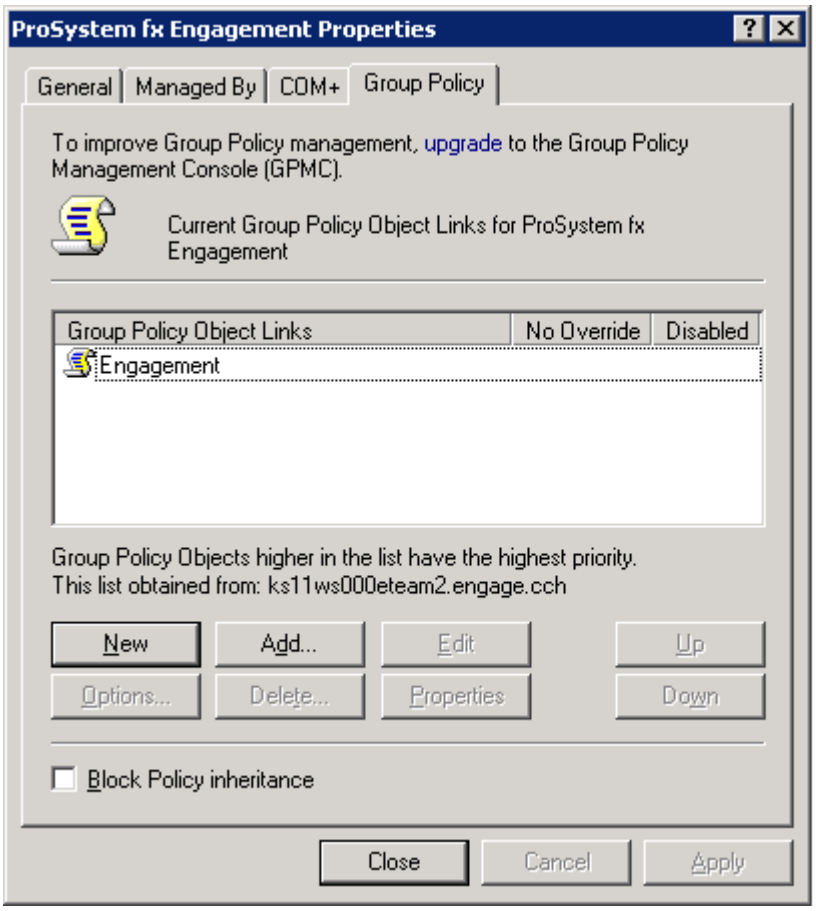
12) **Right-click** on your Organizational Unit and select **Properties**.



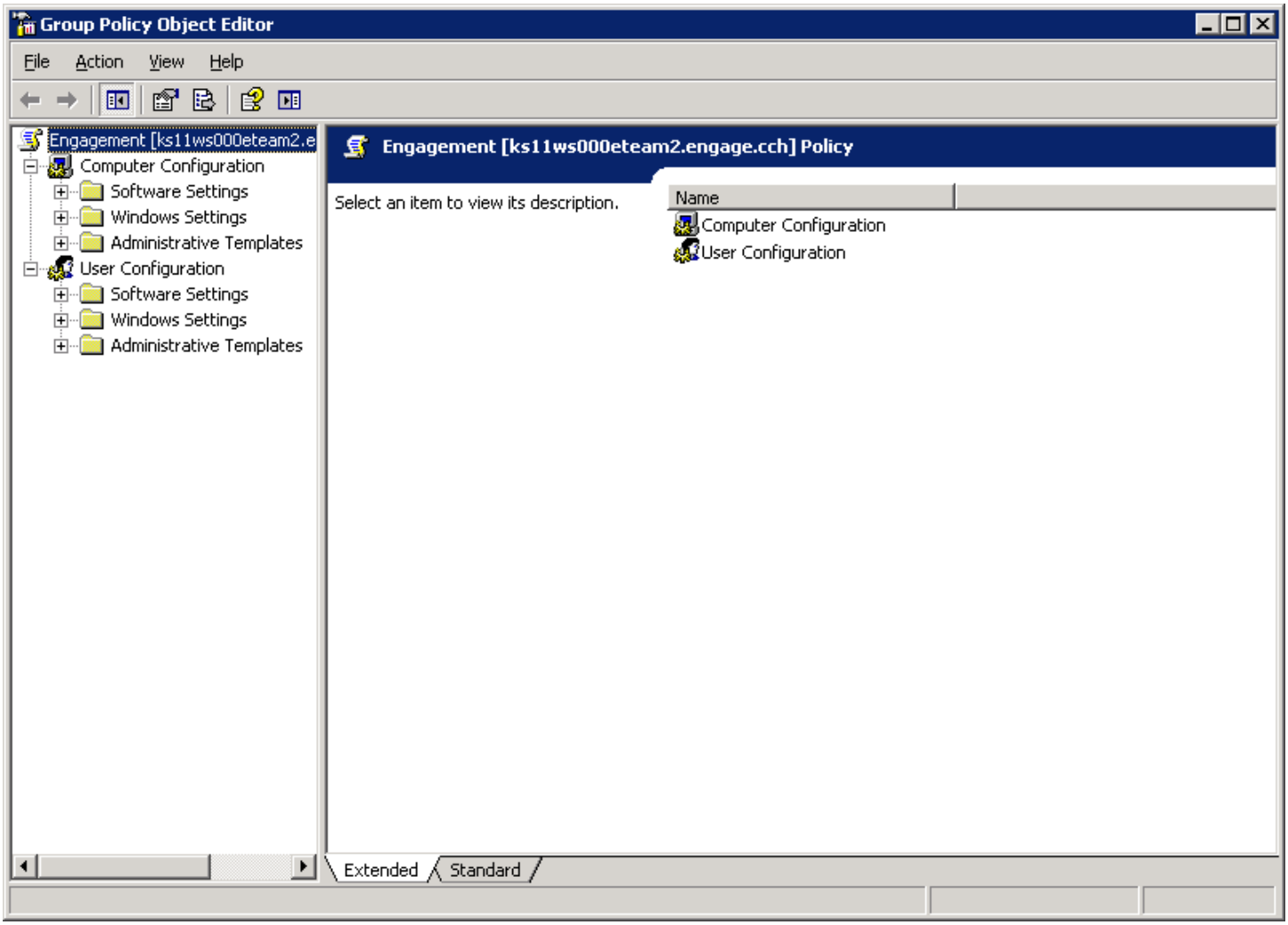
13) In the Properties dialog, select the **Group Policy** tab.



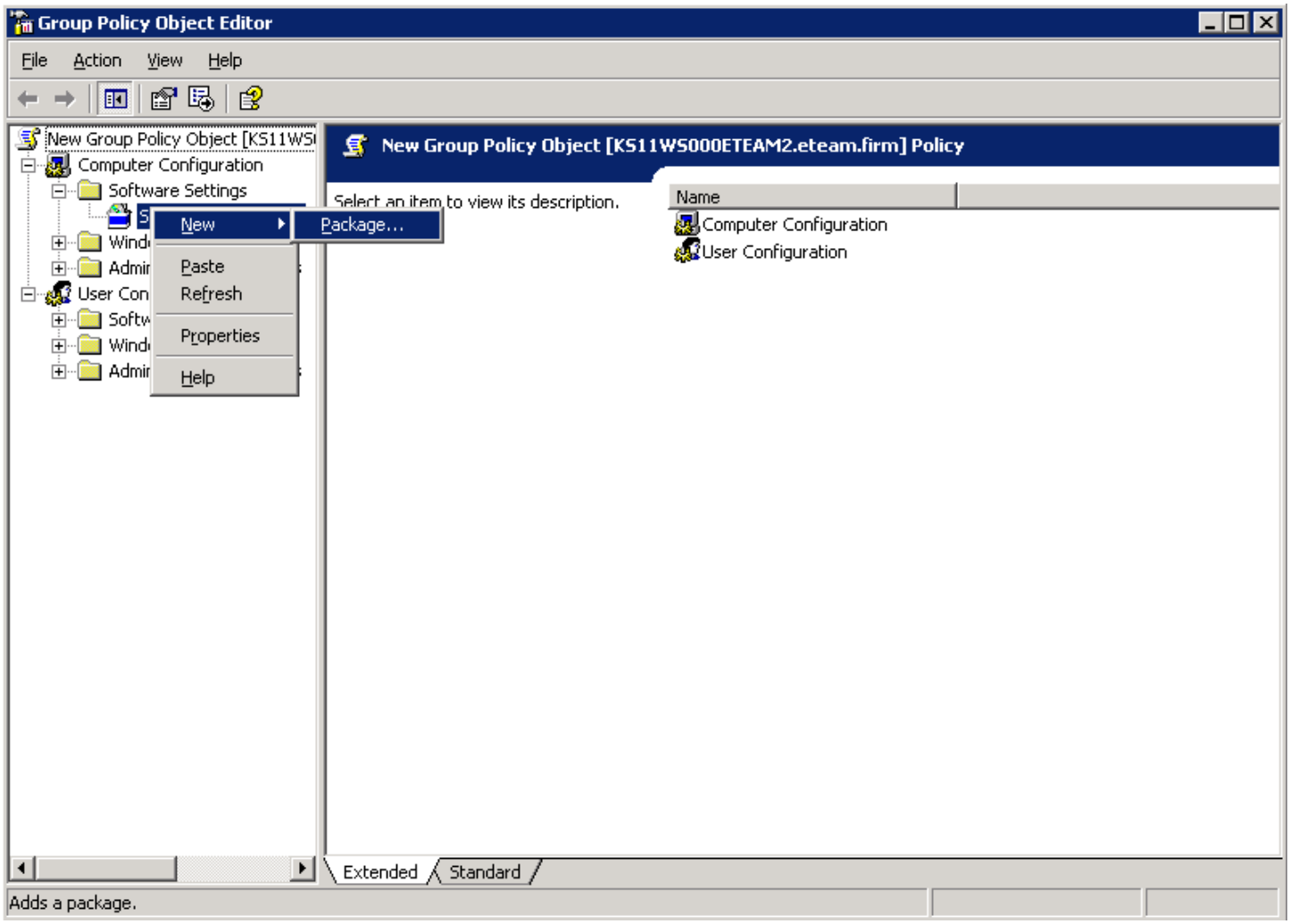
14) Click **New** which will add an entry in the **Group Policy Object Links** pane. You may rename the new entry or use the default name.



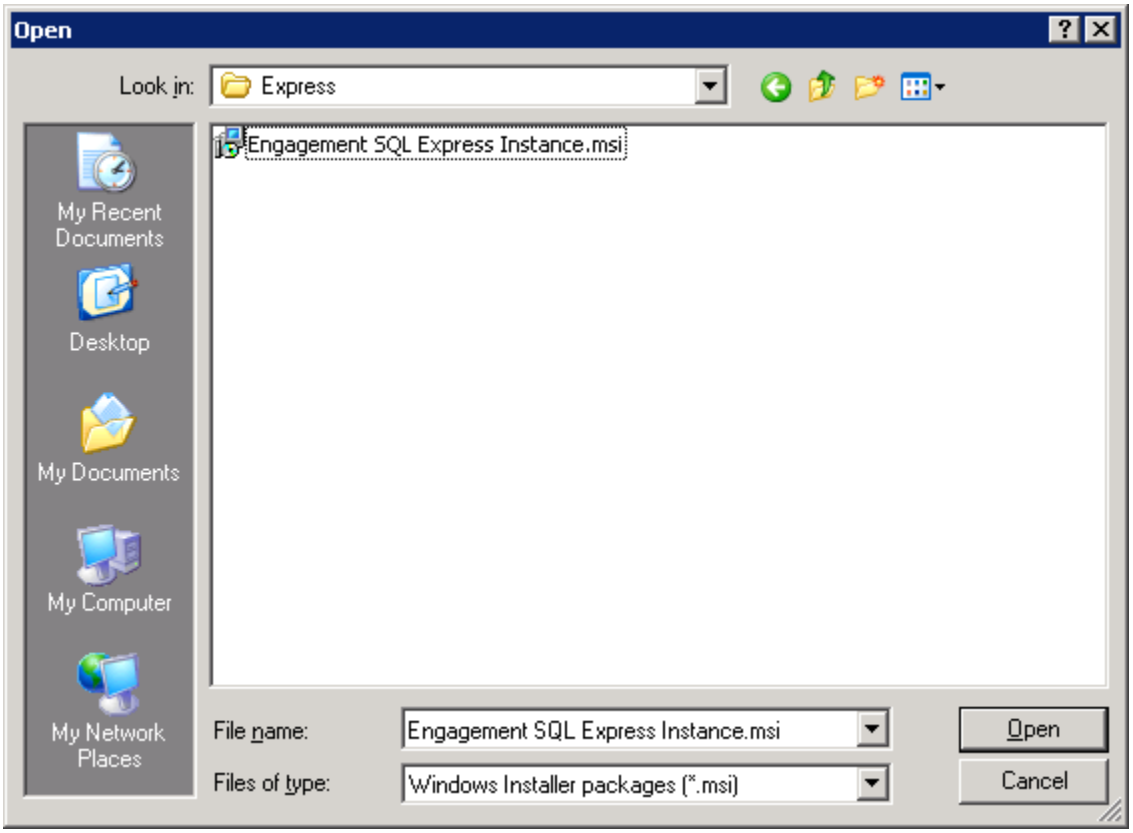
15) With this entry highlighted, click **Edit**. This will display the Group Policy Object Editor screen.



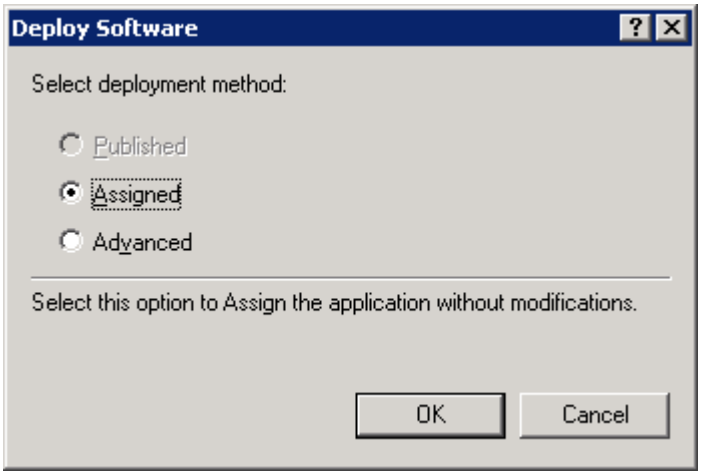
16) Under Computer Configuration, expand the Software Settings folder by clicking on the + icon. Under Software Settings folder, **right-click** on Software installation and select **New** followed by **Package**.



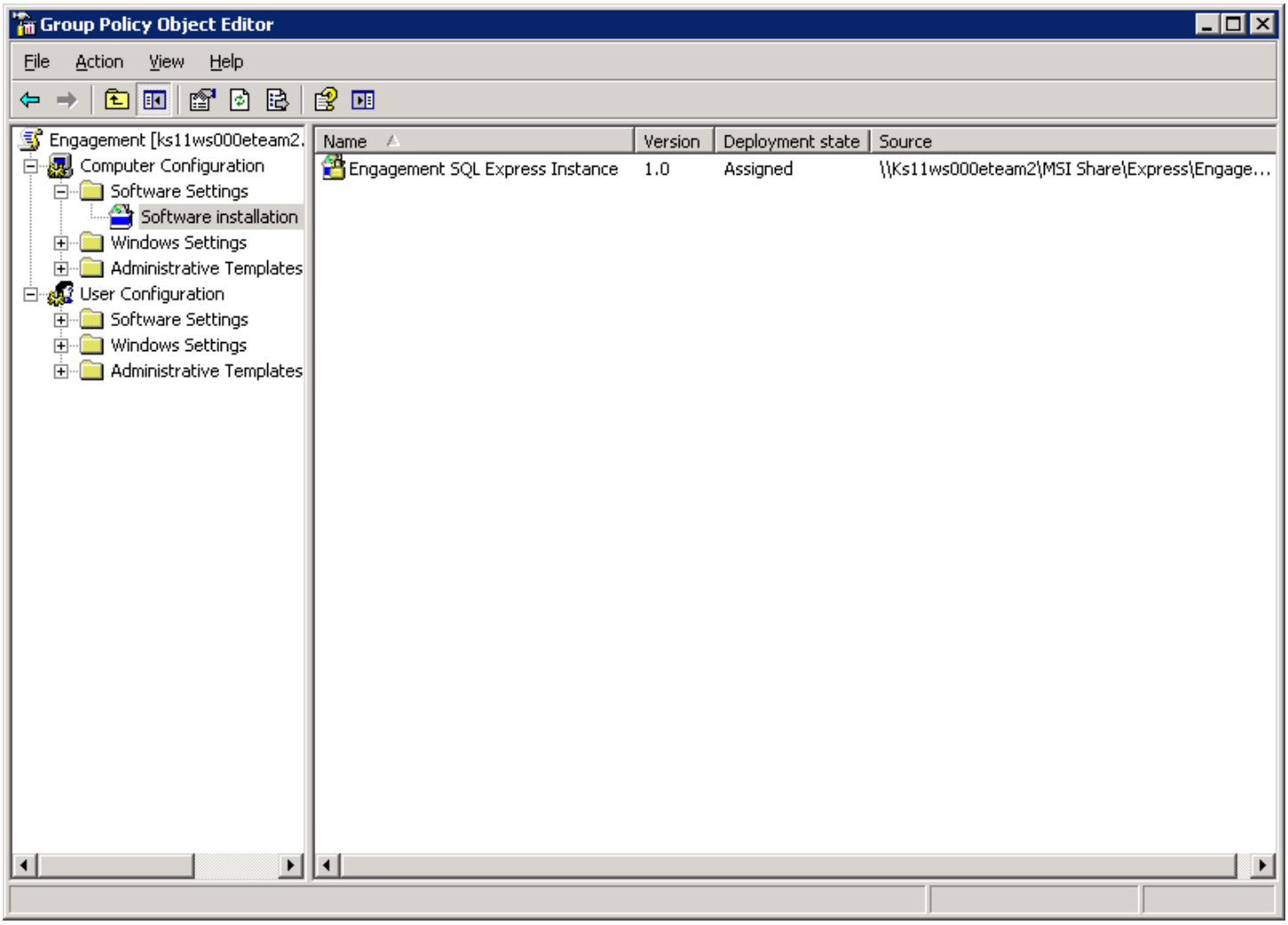
17) Browse to the location of the **Engagement SQL Express Instance.msi** package that was copied to the server's local drive. Highlight the file and click **Open**. (**Note**: When browsing to the location of the installation package, you must use a UNC path.)



18) In the next screen, select the **Assigned** option if not already selected. Click **OK** to continue.



19) Wait a few seconds until the **Engagement SQL Express Instance.msi** package displays under **Software installation.** The SQL Express installation package has now been assigned to all the computers that were selected earlier.



20) Wait a few minutes and then reboot all computers that were selected for installation. SQL Express 2005 will be installed automatically on these machines at start-up; a screen will display showing the message '*Installing managed software Engagement SQL Express Instance'*. On Vista operating systems *'Please Wait'* will display while the application is being installed.

Note: Once the SQL Express 2005 instance push has started, verify that the installation is complete before proceeding with the ProSystem *fx* Engagement push. You may verify the installation of SQL Express with the following steps:

a) Select Start / Run
b) Type "services.msc" and click OK
c) In the list of services, look for an item called "SQL Server (PROFXENGAGEMENT)"
d) Confirm that the Status column shows "Started"

(**Note**: Some computers may take longer than others to receive the SQL Express and ProSystem *fx* Engagement packages. If rebooting the computer does not install the application, reboot the computer again after a few more minutes.)

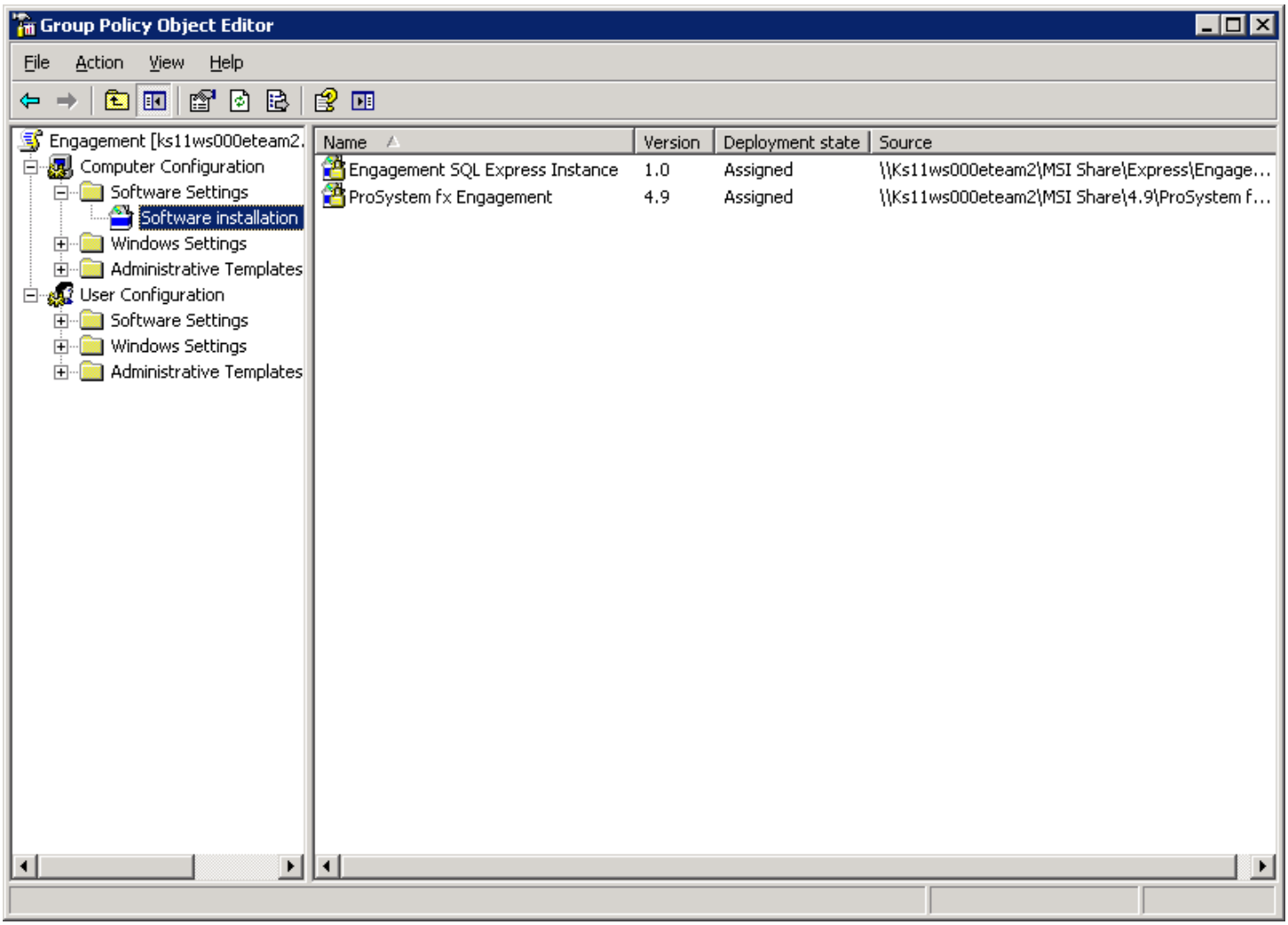
21) After verifying that the SQL Express 2005 instance install has completed, open the Group Policy created for the SQL Express 2005 installation.

22) In the Group Policy Object Editor under Computer Configuration, expand the Software Settings folder by clicking on the + icon. Under Software Settings folder, **right-click** on Software installation and select **New** followed by **Package.**

23) Browse to the location of **ProSystem *fx* Engagement.msi** package that was copied to the server's local drive. Highlight the file and click **Open**. (**Note**: When browsing to the location of the installation package, you must use a UNC path.)

24) On the next screen select the Assigned option if not checked by default.

25) Wait a few seconds until the **ProSystem *fx* Engagement.msi** package displays under **Software Installation.** The ProSystem *fx* Engagement package has now been assigned to all the computers that were selected earlier.


Group Policy Object Editor
File Action View Help
Engagement [ks11ws000eteam2.
Computer Configuration
Software Settings
Software installation
Windows Settings
Administrative Templates
User Configuration
Software Settings
Windows Settings
Administrative Templates
Name
Version
Deployment state
Source
Engagement SQL Express Instance
1.0
Assigned
\\Ks11ws000eteam2\MSI Share\Express\Engage...
ProSystem fx Engagement
4.9
Assigned
\\Ks11ws000eteam2\MSI Share\4.9\ProSystem f...

26) Wait a few minutes and then reboot all computers that were selected for installation. ProSystem fx Engagement will be installed automatically on these machines at start-up; a screen will display showing the message '*Installing managed software ProSystem fx Engagement'*. On Vista operating systems *'Please Wait'* will display while the application is being installed.

If you have a previous version of Engagement installed on any of these computers and are upgrading to version 6.0, all Engagement modules will be upgraded simultaneously. In addition, SQL databases will be converted by the Engagement upgrade installation. For version 6.0, there is a separate process that must be completed to convert trial balance data. Please see the ProSystem fx Engagement Conversion Guide for additional details.

Note: Installing ProSystem *fx* Engagement over versions prior to 5.0 is not supported.

If no prior version of Engagement exists on a computer, then ONLY the SQL Express 2005 instance and ProSystem *fx* Engagement Workpaper Management module (including Trial Balance) with knowledge Tools will be installed.

Note: It is possible to use the push installation to modify an existing installation to include the newly released Knowledge Coach components. Please contact technical support for the appropriate MSI transform file if you have a need to push the Knowledge Coach installation.

Note: The SQL Express 2005 instance must be pushed separately as the SQL instance must be installed prior to the ProSystem *fx* Engagement installation.