ProSystem *fx*® Engagement

Installation Guide

October 2009

C O N T E N T S

Installation

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Overview

This guide provides step-by-step instructions for installing the ProSystem *fx* Engagement Administrator and Workpaper Management modules. The minimum and recommended system requirements are also provided.

Before you begin, refer to the following documents:

- The *License Agreement* for information and restrictions on installation.

- The *ProSystem fx Engagement Release Bulletin* for new product features.

- The *Administrator/Office Server Tips* document for assistance in determining how you should configure office servers for your firm.

Two ProSystem *fx* Engagement modules must be installed in order for the application to function. These modules are the Administrator module and the Workpaper Management module.

The Administrator module is an organizational tool designed to provide security and control rights for different staff levels, as well as organize and maintain your office servers and central file rooms. The Administrator module should be installed on a Windows server or a dedicated computer, and it should be on a location that can be accessed by all computers in your firm. If you have multiple offices, you may want to establish secondary office servers, and thus install the Administrator module on the Windows server or dedicated computer for each office. The Administrator module installation must be performed while sitting at the console of the Windows server or the dedicated computer.

The Workpaper Management module relies on the Administrator module to provide login information, central storage, and secured access to all your client data. The Workpaper Management module should be installed on each user's computer.

Note: If you are installing to a multi-server Citrix farm or to a Windows Terminal Services environment, install ProSystem *fx* Engagement Administrator in the standard manner, and then see *Terminal Services Installation* on page 16.

Installation

Engagement 6.0 Requirements

The following two tables detail the requirements for the Engagement Administrator and Workpaper Management modules.

Administrator Module

System Requirements	Recommended	Minimum
Microprocessor	**32-Bit** Pentium 4 processor, 2.8 GHz or faster **64-Bit** Pentium 4 single-core processor, 3.2 GHz, or any multi-core processor	**32-Bit** Pentium 4 processor, 2 GHz **64-Bit** ▪ Pentium 4 processor, 3.2 GHz, or any multi-core processor ▪ AMD Athlon 64, Intel Pentium 4 with Intel EM 64T support
Supported Operating Systems	**For SQL 2005** ▪ Windows Vista (Business, Enterprise, and Ultimate: 32 bit and 64 bit) ▪ Windows XP Professional with Service Pack 2 (32 bit) ▪ Windows XP Professional with Service Pack 1 (64 bit) ▪ Windows Server 2003 Service Pack 1 (Standard and Enterprise: 32 bit and 64 bit) ▪ Windows Server 2008 (Standard and Enterprise: 32 bit and 64 bit) **For SQL 2008** ▪ Windows Vista (Business, Enterprise, and Ultimate: 32 bit and 64 bit) ▪ Windows XP Professional with Service Pack 2 (32 bit and 64 bit)) ▪ Windows Server 2003 Service Pack 2 (Standard and Enterprise: 32 bit and 64 bit) ▪ Windows Server 2008 (Standard and Enterprise: 32 bit and 64 bit) **Note:** Novell Netware 5.1 or higher and Linux are supported for workpaper storage only.	
Terminal Server and Citrix	▪ Windows Server 2003 with Service Pack 1 (32 bit and 64 bit) with Terminal Services ▪ Windows 2008 Server (32 bit and 64 bit) with Terminal Services ▪ Citrix Presentation Server 4.5 or higher	

System Requirements	Recommended	Minimum

System Memory	2 GB RAM	**32 Bit**
		
		  ▪ 1 GB RAM for Windows XP Professional
		
		  ▪ 2 GB RAM for Vista and server-class operating systems
		
		64 Bit
		
		4 GB RAM

	Additional memory improves performance and may be required to run additional applications simultaneously.	
Drive Space	Administrator requires 500 MB of drive space when installed with the CD image files, 200 MB of drive space in the Temp folder, and additional space required for data.	
Video	Super VGA at 32 bit color quality with a resolution of 1024 x 768.	Super VGA at 16 bit color quality with a resolution of 800 x 600.
	ProSystem *fx* Engagement does not support large fonts.	

Network Environment

Microsoft	Client for Microsoft Networks and Microsoft TCP/IP.

Other Software

SQL	**SQL 2005 Supported Editions:**
	  ▪ SQL Server 2005 Service Pack 2 Standard Edition (32 bit and 64 bit)
	  ▪ SQL Server 2005 Service Pack 2 Enterprise Edition (32 bit and 64 bit)
	  ▪ SQL Express Service Pack 2 (32 bit)
	
	SQL 2008 Supported Editions
	  ▪ SQL Server 2008 Standard Edition (32 bit)
	  ▪ SQL Server 2008 Enterprise Edition (32 bit)
	  ▪ SQL Server 2008 Express (32 bit)
	
	Note: SQL Server 2008 64 bit is not supported

Data Access Components	The following items are installed automatically with ProSystem *fx* Engagement:
	  ▪ Microsoft Jet Database Engine 4.0 with Service Pack 6
	  ▪ Soap Toolkit 3.0
	  ▪ MSXML 4.0 Service Pack 2 parser
	  ▪ SQLXML 3.0 Service Pack 3
	  ▪ Microsoft Visual C++ 2008 Redistributable vcredistsp1_x86.exe - 9.0.30729.17
	  ▪ Microsoft Visual C++ 2008 Redistributable vcredist_x86.exe - 9.030729.4148

System Requirements	Recommended	Minimum
Data Access Components **(cont)**	The following items are installed automatically with ProSystem *fx* Engagement if an SQL 2005 instance is found: ▪ Microsoft SQL Server 2008 Management Object (32 bit) ▪ Microsoft SQL Server 2008 Native Client (32 bit or 64 bit, according to operating system) ▪ SQL Server System CLR Types (32 bit) The following items are installed automatically with ProSystem *fx* Engagement if SQL 2008 32bit is found on a 64 bit operating system: ▪ Microsoft SQL Server 2008 Management Object (32 bit) ▪ SQL Server System CLR Types (32 bit) MDAC 2.8 Service Pack 1 is required by SQL Server 2005 Express. Windows Installer 3.1 is required by SQL Server 2005 Express. Windows Installer 4.5 is required by SQL Server 2008 Express. Microsoft .NET Framework 2.0 is required by SQL 2005 and Admin Workstation. Microsoft .NET Framework 3.5 SP1 is required by SQL 2008. Adobe Reader 7.0 or higher is optional.	
Web Browser	Internet Explorer 6.0 with Service Pack 1 or higher	
Email	Microsoft Mail, Microsoft Exchange, GroupWise, Internet SMTP/POP3, or other MAPI compliant messaging software to use network or Internet email	None
Other Hardware		
Internal or External DVD drive	Any internal or external DVD compatible drive for reading the installation media. The installation media is distributed on DVD, and can be copied to other machines or locations as needed.	

Workpaper Management Module

System Requirements	Recommended	Minimum
Microprocessor	**32-Bit** Pentium 4 processor, 2.8 GHz or faster **64-Bit** Pentium 4 single-core processor, 3.2 GHz (or any multi-core processor)	**32-Bit** Pentium 4 processor, 2 GHz **64-Bit** - Pentium 4 processor, 3.2 GHz (or any multi-core processor) - AMD Athlon 64, Intel Pentium 4 with Intel EM 64T support
Supported Operating Systems	**For SQL 2005** - Windows Vista with Service Pack 1 (Business, Enterprise, and Ultimate: 32 bit and 64 bit) - Windows XP Professional with Service Pack 2 (32 bit) - Windows XP Professional with Service Pack 1 (64 bit) **For SQL 2008** - Windows Vista (Business, Enterprise, and Ultimate: 32 bit and 64 bit) - Windows XP Professional with Service Pack 2 (32 bit and 64 bit)	
Terminal Server and Citrix	- Windows Server 2003 with SP 1 (32 bit and 64 bit) with Terminal Services - Windows Server 2008 (32 bit and 64 bit) with Terminal Services - Citrix Presentation Server 4.5 or higher	
System Memory	**32-Bit** 2 GB RAM **64-bit** 4 GB RAM	**32-Bit** 1 GB RAM for Windows XP Professional 2 GB RAM for Vista and Server class operating systems **64-Bit** 4 GB RAM
	Additional memory improves performance and may be required to run additional applications simultaneously.	
Drive Space	Workpaper Management requires 250 MB of drive space, 200 MB of free space for the Temp folder during installation, and additional space required for data.	
Video	Super VGA at 32 bit color quality with a resolution of 1024 x 768.	Super VGA at 16 bit color quality with a resolution of 800 x 600.
	ProSystem *fx* Engagement does not support large fonts.	

System Requirements	Recommended	Minimum
Knowledge Coach		
Knowledge Coach Requirements	■ Microsoft Vista with Service Pack 2 ■ Office 2007 ■ Visual Studio Tools for Office (VSTO) ■ Microsoft .NET Framework 3.5 Service Pack 1	
Other Software		
Microsoft Office	Office 2003 with Service Pack 2 or higher	■ Office 2007, Office 2003 with Service Pack 1, or Office XP with Service Pack 2 is required for ProSystem *fx* Engagement ■ Office 2007 is required for ProSystem *fx* Knowledge Coach ■ Office 2007 or Office 2003 Professional with Service Pack 2 is required for ProSystem *fx* Knowledge Tools
SQL	**SQL 2005 Supported Editions** ■ SQL Server 2005 Service Pack 2 Standard Edition (32 bit) ■ SQL Server 2005 Service Pack 2 Enterprise Edition (32 bit) ■ SQL Express Service Pack 2 (32 bit) **SQL 2008 Supported Editions** ■ SQL Server 2008 Standard Edition (32 bit) ■ SQL Server 2008 Enterprise Edition (32 bit) ■ SQL Server 2008 Express (32 bit) **Note:** SQL Server 2008 64 bit is not supported.	
Data Access Components	The following items are installed automatically with ProSystem *fx* Engagement: ■ Microsoft Jet Database Engine 4.0 with Service Pack 6 ■ Soap Toolkit 3.0 ■ MSXML 4.0 Service Pack 2 parser ■ SQLXML 3.0 Service Pack 3 ■ Microsoft Visual C++ 2008 Redistributable vcredistsp1_x86.exe - 9.0.30729.17 ■ Microsoft Visual C++ 2008 Redistributable The following items are installed automatically with ProSystem *fx* Engagement if an SQL 2005 instance is found: ■ Microsoft SQL Server 2008 Management Object (32 bit) ■ Microsoft SQL Server 2008 Native Client (32 bit or 64 bit, according to operating system) ■ SQL Server System CLR Types (32 bit)	

System Requirements	Recommended	Minimum
Data Access Components	The following items are installed automatically with ProSystem *fx* Engagement if SQL 2008 32bit is found on a 64 bit operating system: • Microsoft SQL Server 2008 Management Object (32 bit) • SQL Server System CLR Types (32 bit) MDAC 2.8 Service Pack 1 is required by SQL Server 2005 Express. Windows Installer 3.1 is required by SQL Server 2005 Express. Windows Installer 4.5 is required by SQL Server 2008 Express. Microsoft .NET Framework 2.0 is required by SQL 2005. Microsoft .NET Framework 3.5 SP1 is required by SQL 2008, Workpaper Management, and Knowledge Coach. If Office 2007 is installed, Office 2007 Primary Interop Assemblies (PIA) and Visual Studio Tools for the Office Runtime version 3.0 will be installed automatically. If Office 2003 Professional SP2 is installed and Knowledge Tools is selected for installation, Office 2003 Primary Interop Assemblies (PIA) and Visual Studio 2005 Tools for Office Runtime 2.0 (VSTOR) will be installed automatically. Visual Studio Tools for Office (VSTO) is required for Knowledge Coach. Adobe Reader 7.0 or higher is optional.	
Web Browser	Internet Explorer 6.0 with Service Pack 1 or higher.	
Email	Microsoft Mail, Microsoft Exchange, GroupWise, Internet SMTP/POP3, or other MAPI compliant messaging software to use network or Internet email.	None.
Other Hardware		
Internal or External DVD drive	Any internal or external DVD compatible drive for reading the installation media. The installation media is distributed on DVD, and can be copied to other machines or locations as needed.	

Installation Considerations

Important:

- If you are using MSI Push, please see *MSI Push Installation Guide* located in the document folder for more information.

- You must first install SQL manually if you are installing Engagement Administrator and/or Engagement Workpaper Management for the first time to a server or workstation that does not have a C: drive.

We recommend that you update your video card driver to the latest driver available and install Microsoft Direct X 9.x or higher.

Compressed Folders

The requirement of uncompressed drives is outlined in SQL Server 2005 Books Online (see **http://msdn2.microsoft.com/en-us/library/ms143719.aspx**). If you are upgrading a current installation of Engagement, this should not be an issue. Otherwise, it is important to identify and uncompress any compressed folders and files that may exist in locations where Engagement or Microsoft SQL Server/Express databases exist. The new SQL Instance installation detects any compressed files and exits with an error message if they are found.

If compressed files are found, it is recommended that you uncompress the drive containing SQL and Engagement.

To uncompress the drive, do the following:

1. In My Computer, right-click the drive that will contain Engagement and select **Properties**.

2. Uncheck the option *Compress this drive to save disk space*.

3. Click **Apply** and then **OK** to uncompress the drive.

If the SQL Instance installation still detects compressed files, then please call Technical Support for assistance. If you are upgrading Engagement, then you should not have to do anything regarding compressed drives.

Networking Best Practices

For in-depth networking instructions on ProSystem *fx* Engagement, please see the *ProSystem fx Engagement Networking Best Practices* document located in the Documents folder of the installation DVD. This document covers the following network issues:

- Windows, Novell, and Linux servers
- LAN, WAN, and VPN topologies
- Port configuration
- SQL configuration
- Communication across networks and subnets
- Static versus dynamic IP addresses on office servers

The *ProSystem fx Engagement Networking Best Practices* document also addresses the following topics in detail:

- Long file names must be enabled on the server(s) where the ProSystem *fx* Engagement Administrator is located.

- ProSystem *fx* Engagement utilizes Microsoft SQL server 2005 Express and Microsoft SQL server 2008 Express.

  The server must be a Windows computer with any of the following operating systems installed: Windows XP Professional with Service Pack 2, Windows 2003 Server with Service Pack 1 (Service Pack 2 required for SQL Server 2008), Windows XP Professional with Service Pack 1 (64 Bit, Service Pack 2 for SQL Server 2008), Windows 2003 Server with Service Pack 1 (64 bit, Service Pack 2 for SQL Server 2008), Windows 2008 Server (32 bit or 64 bit), or Windows Vista (Enterprise, Ultimate, or Business). The databases cannot reside on a Novell or Linux server.

- SQL Server 2005 is a memory intensive program. Steps can be taken to optimize these programs for improved program and server performance.

- ProSystem *fx* Engagement allows users to use their workpapers on a different server than where the binder database is located (Office Server). In these cases, the ProSystem *fx* Engagement Synchronization service needs to be configured to run under an account with rights to the location where the workpapers are being stored. The workpapers can reside on a non-Windows server.

- Time synchronization plays an important part in ProSystem *fx* Engagement. All servers and workstations running Engagement (in the office and out in the field) should maintain time clock synchronization to ensure that you do not lose data and to ensure that the latest changes to data and server are properly synchronized.

- Changing the names for any workstation or server is not recommended after ProSystem *fx* Engagement has been installed. This is due to the installation of SQL.

For additional information or for the latest update on any of these items, please contact ProSystem *fx* Technical Support at 1-800-739-9998.

ProSystem *fx* Engagement Administrator Considerations

Engagement Administrator is an organizational tool designed to provide security and control rights for different staff levels and to organize and maintain your office servers and central file rooms. Workpaper Management relies on Administrator to provide login information, central storage, and secured access to all your client data.

Administrator should be installed and configured on a Windows server or a dedicated computer with Windows 2003 Server with Service Pack 1 or higher. If you plan to maintain multiple office servers, the Administrator module should be installed and configured on a Windows server or a dedicated computer for each office. (For more information on office servers, please refer to *Setting up the Administrator Environment* in Chapter 3 of the User Guide.)

Engagement Administrator must be installed to a location accessible by all computers running ProSystem *fx* Engagement Workpaper Management. Administrator installation must be performed at the console of the Windows server or the dedicated computer. It cannot be installed by pushing the install from another computer to the Windows server or dedicated computer.

The Administrator Workstation setup allows you to remotely access the Administrator module. The Administrator Workstation can be installed to any workstation that needs to remotely access the Administrator module.

Important: Engagement Administrator should **not** be installed on every computer in your firm.

Pre-Installation Checklist

For detailed installation and configuration instructions, please see the *ProSystem fx Engagement Networking Best Practices* document.

Before beginning the installation, verify that all of the following tasks are completed:

☐ If you are upgrading to ProSystem *fx* Engagement 6.0 from a prior version, do the following:

> **Important:** All machines running Engagement in a network environment must be upgraded to version 6.0 in order for users to access the software. It is not possible to run different versions of Engagement within the same office.

- **Upgrade the main office server first**. We recommend that you upgrade the main office server first, then upgrade the workstations in order of priority to begin using the software.

- **Back up the central databases**. Back up all central admin and bin databases prior to upgrading. For detailed instructions on using the backup restore utility, refer to the *Database and Restore Instructions v6.0.pdf* file in the Documents folder of the installation DVD.

- **Back up the workpapers**. Back up all workpapers before upgrading. To ensure that this backup contains the latest versions of all files, users should synchronize all binders to the Central File Room prior to the backup.

- **Back up templates**. Back up all centrally located templates prior to upgrading to allow for a full rollback if necessary.

☐ Close Microsoft Word, Excel, and Outlook.

☐ We strongly recommend that you close any additional programs.

☐ Disable virus-checking programs.

☐ If you are installing on a computer that currently has another application using SQL, stop that instance. For instructions on how to stop and start services, see the *ProSystem fx Engagement Networking Best Practices* document.

☐ If you install ProSystem *fx* Engagement to a server that is running Microsoft SQL Server 2005 or 2008 Enterprise or Standard Edition, we recommend that you use the SQL Server 2005 or 2008 Enterprise or Standard Edition instead of SQLExpress 2005 or 2008. This allows ProSystem *fx* Engagement to run optimally.

If you use the Standard or Enterprise Editions, you must do the following:

- Configure a named instance of SQL Server for ProSystem *fx* Engagement prior to installation. Detailed instructions for how to setup and configure SQL Server are included on the DVD in the *ProSystem fx Engagement Networking Best Practices* document.

- Install Service Pack 2 for SQL Server 2005.

- Have appropriate licensing on the SQL server.

☐ Ensure that the operating system, Microsoft Internet Explorer, and Microsoft Office are all installed with the required service packs (see page 2, *Engagement 6.0 Requirements*, for details).

General Installation Instructions

This section provides standard installation procedures for the ProSystem *fx* Engagement Administrator module and Workpaper Management module.

Notes to Citrix Users:

- Follow these instructions if you are installing to a single-server Citrix or Windows Terminal Services environment.

- Do not follow these instructions if you are installing to a multi-server Citrix or Windows Terminal Services (Load Balanced) farm. Instead, refer to Terminal Services Installation on page 16.

Caution: Publishing installation Group Policy Objects through Active Directory is not recommended due to possible conflicts among versions (e.g., Canadian Engagement Administrator and United States Engagement Workpaper Management on the same workstation).

To install ProSystem *fx* Engagement, do the following:

1. Complete all tasks in the Pre-Installation Checklist on page 10.

**2.** Insert the Engagement DVD.

Notes:

- If you do not have Adobe Reader version 7.0 or later, you are given the opportunity to install it. You need Adobe Reader to view the *Installation Guide* or *Release Bulletin* in step 11 of this procedure. You also need Adobe Reader to view the *ProSystem fx Engagement User Guide* via **Help/User Guide**. Click **Yes** to continue installing ProSystem *fx* Engagement without Adobe Reader. Click **No** to cancel the installation and install Adobe Reader 7.0 or later. Adobe Reader 8.0 is included on the Engagement Installation Disk.

- The splash screen can be customized. Please contact Technical Support for additional information.

3. If an Engagement SQL Instance is already installed, skip to step 8.

If an Engagement SQL Instance is not already installed, do one of the following:

- Install Microsoft SQL Server 2005 Standard or Enterprise edition (32 bit or 64 bit) or SQL Server 2008 (32 bit) as explained in the *ProSystem fx Engagement Networking Best Practices* document, and then skip to step 8.

- Install Microsoft SQL Express 2005 or 2008 that are included on the Engagement disc. To install SQL Express 2005 or SQL Express 2008, continue to step 4.

4. If autorun is enabled, click **Install SQL Express 2005** or **Install SQL Express 2008**.

If Autorun is not enabled, select **Start/Run**. In the *Open* field, enter **X:\ProSystem fx SQL 2005 Instance Installer.msi** or **X:\ProSystem fx SQL 2008 Instance Installer.msi** (Vista or Server 2008 users enter **ProSystem fx SQL 2005 Instance Installer.exe** or **ProSystem fx SQL 2008 Instance Installer.exe**), where X represents your DVD-ROM drive letter, and click **OK**. The SQL 2005 Instance Installer wizard displays.

5. Click **Next**. The *Ready to Install the Program* page displays.

6. Click **Install**. Several status screens display as the SQL Instance is installed.

7. Click **Finish**.

8. If Autorun is enabled, the Engagement splash screen displays. Click **Install ProSystem fx Engagement**.

   If Autorun is not enabled, the *Run* dialog displays. In the *Open* field, enter **X:\ProSystem fx Engagement.msi** (Vista or Server 2008 users enter **X:\PfxEngSetup.exe**), where X represents your DVD-ROM drive letter, and click **OK**. The *Welcome* dialog displays.

9. Click **Next**. The *License Agreement* dialog displays.

10. Read the license agreement. If you agree to the terms, select **I accept the terms in the license agreement** and click **Next**. The *Install Guide and Release Bulletin* dialog displays.

11. Click **Install Guide** to view a PDF of the *Installation Guide*. Click **Release Bulletin** to view the *Release Bulletin* for ProSystem *fx* Engagement.

12. Click **Next**. The *Custom Setup* page displays.
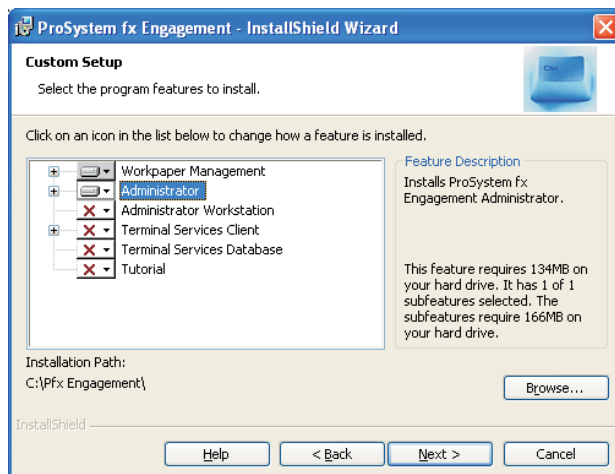
13. Select the module or modules to install. Click the appropriate icon and select **This feature will be installed on local hard drive** to install the module or **This feature, and all subfeatures, will be installed on local hard drive** to install the module and all subfeatures (e.g., Engagement CD Image for Administrator, or Templates and Sample Binder for Workpaper Management).

   ■ **Workpaper Management**. Workpaper Management should be installed on computers that will be accessed by Engagement staff members.

   Note: Microsoft Office 2003 Professional with Service Pack 2 or a later version of Microsoft Office is required in order to install ProSystem *fx* Knowledge Tools. For new installations of Engagement, the Professional edition is required. If you are upgrading from a prior Engagement version, then another edition of Office 2003 (such as Standard) is allowed if it is already installed. If a prior version of Office is detected, the Knowledge Tools subfeature of Workpaper Management is not available for installation.

- **Administrator**. The Administrator module should be installed on a dedicated computer that is designated as the main office server. Computers with the Workpaper Management module installed need access to this main office server computer.

  Notes:

  — If you plan to create a secondary office server or servers, install the ProSystem *fx* Engagement Administrator module on a separate dedicated computer. When more than one office server exists, workstations with Workpaper Management installed do not necessarily need a network connection to both office servers. Some can connect to the main office server while others connect to a secondary office server.

  — It is not mandatory to have a network connection between the main and secondary office servers. Data can be passed between the two using *Create and Receive Admin Packages*. (For more information, see *Creating an Admin Package* and *Receiving an Admin Package* in Chapter 3 of the User Guide)

- **Administrator Workstation**. The Administrator Workstation setup allows you to access the Administrator module remotely.

14. If you selected *Administrator* in step 13 (with or without Workpaper Management) the *Administrator Bin Database Path* dialog displays. The system creates the database in the default folder on your local computer unless you click **Browse** and specify a different location.

15. Click **Next**. The *Ready to Install* dialog displays.

    Notes:

    - If you attempt to install conflicting applications, such as Administrator and Administrator Workstation, InstallShield displays a conflict message specifying the conflicting applications. Click **Back** to make the necessary changes.

    - If your system does not meet the requirements for the application you are installing, InstallShield displays a message listing the missing components. Click **Cancel** to install the necessary components. Click **Back** to install a different application. For detailed information about the new bin structure of the Engagement database, see *Managing Bins* in Chapter 3 of the User Guide.

16. Click **Install**. InstallShield displays several progress screens as the necessary programs and features are installed.

    Note: If ProSystem *fx* Knowledge Tools is selected for installation and Microsoft Office 2003 or Office 2007 Primary Interop Assemblies (PIA) and Visual Studio 2005 Tools for Office Runtime (VSTOR) are not installed on your computer, the respective progress for these components display.

17. If you are installing Administrator, read the information on the *Backup Information* dialog and select **I have read the above warning**, then click **Next**. The *InstallShield Wizard Completed* dialog displays.

18. Click **Finish**, then complete any applicable tasks in the next section, *Post-Installation Checklist*.

Post-Installation Checklist

After completing the installation, you should perform the following tasks, as applicable:

☐ If you are upgrading from a prior version of Engagement, convert all trial balances to the Microsoft SQL database format. To do this, select **Start/Programs/ProSystem fx Engagement/Utilities/ProSystem fx Engagement Trial Balance Conversion Wizard**, and then follow the instructions in the wizard.

☐ Verify that all administrative users have full access to the Admin Share folder on the office server. This folder, which is created during the installation, is shared by default, but the network administrator needs to ensure that all Engagement administrative users have full rights to that location. For additional information, see the *ProSystem fx Engagement Networking Best Practices* document.

☐ Windows XP and Windows Server 2003 have built-in security that, by default, does not enable full rights to newly created folders. If installing ProSystem *fx* Engagement to a Windows XP workstation, the network administrator or person installing the program needs to ensure that full rights are given to the installation location of any installed Engagement module. This is especially important if the program is being installed to the Program Files folder. For additional information, see the *ProSystem fx Engagement Networking Best Practices* document.

Altering a Current Install of Engagement

ProSystem *fx* Engagement Program Maintenance allows you to modify, repair, or remove the current installation.

Modifying a Current Install

To add new program features or remove currently installed features, do the following:

1. Close all programs on your computer.

2. Select **Add or Remove Programs** (or **Programs and Features** in Windows Vista and Windows Server 2008) from your computer's Control Panel.

3. Select **ProSystem fx Engagement** from the list and click **Change** to open the *Welcome* dialog.

4. Click **Next** to display the *Program Maintenance* dialog.
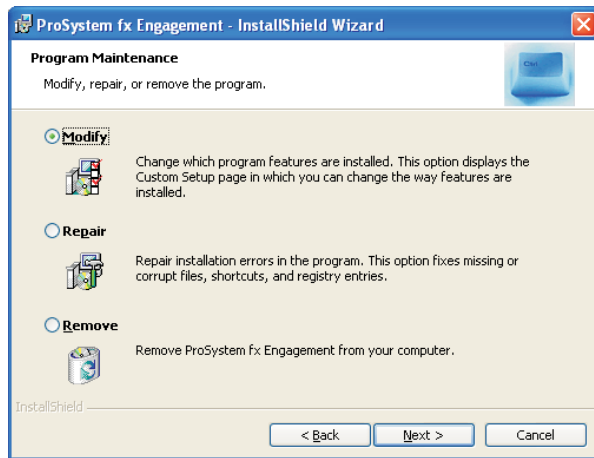
5. Select **Modify** and then click **Next**. The *Custom Setup* dialog displays.

6. Select applications to install and deselect applications to remove. Click the **plus sign** (+), where available, to select individual options to install or remove. The *Custom Setup* dialog displays the amount of space required for installation.

7. Click **Next** to display the *Ready to Modify* dialog.

8. Click **Install** to begin the update process. The *InstallShield Wizard Completed* dialog displays when the process is finished.

9. Click **Finish** to exit the installation.

Repair a Current Install

To repair program features from a previous installation, do the following:

1. Close all programs on your computer.

2. Select **Add or Remove Programs** (or **Programs and Features** in Windows Vista and Windows Server 2008) from your computer's Control Panel.

3. Select **ProSystem fx Engagement** from the list and click **Change** to open the *Welcome* dialog.

4. Click **Next**. The *Program Maintenance* dialog displays.

5. Select **Repair** and then click **Next**. The *Ready to Repair* dialog displays.

6. Click **Install**. The *Installing ProSystem fx Engagement* status bar displays while InstallShield repairs the installation(s). Once the repair process is finished, the *InstallShield Wizard Completed* dialog displays.

7. Click **Finish**.

Removing ProSystem *fx* Engagement

To remove all installed features, do the following:

1. Close all programs on your computer.

2. Select **Add or Remove Programs** (or **Programs and Features** in Windows Vista and Windows Server 2008) from your computer's Control Panel.

3. Select **ProSystem fx Engagement** from the list and click **Remove** to display the *Welcome* dialog.

4. Click **Yes** on the confirmation dialog. Windows removes all ProSystem *fx* Engagement applications.

CCH Workpaper Downloads

For detailed instructions on downloading and installing a CCH (formerly Miller) Integrated Engagement Guide, please refer to the release bulletin for each integrated title.

You can download the release bulletin from the CCH Web site at **http://tax.cchgroup.com**. A release bulletin will also be mailed to you when you purchase an integrated CCH Title.

Knowledge Tools Content

For instructions on downloading and installing Knowledge Tools content, please refer to the Knowledge Tools User Guide, available on the Engagement Installation DVD.

For more information about Knowledge Tools, or to download Knowledge Tools titles, go to **http://tax.cchgroup.com/knowledgetools**.

Knowledge Coach Content

For instructions on downloading and installing Knowledge Coach content, please refer to the *Getting Started with Knowledge Coach* section of the Knowledge Coach Help file.

Terminal Services Installation

Follow these instructions if you are installing to a multi-server Citrix or Windows Terminal Services (Load Balanced) farm.

Important: If you are installing Engagement to a single (or stand-alone) Citrix or Windows Terminal server, do **not** follow these instructions. Instead, install Workpaper Management using the general installation instructions starting on page 11.

The installation of ProSystem *fx* Engagement Workpaper Management can vary based on the Terminal Services and Citrix MetaFrame software setup. For this reason, we strongly suggest that you consult with your network administrator prior to installing Engagement. We also advise contacting Technical Support prior to installation to address any questions you may encounter with the installation.

Important: The following instructions outline the preferred steps for installing ProSystem *fx* Engagement Terminal Services Client; however, your configuration may require additional or alternate steps. For additional assistance, please contact Technical Support at 1-800-739-9998.

Before beginning, install ProSystem *fx* Engagement Administrator. Refer to the general installation instructions starting on page 11 for detailed instructions.

The following section contains instructions for installing the ProSystem *fx* Engagement Terminal Services Client (Workpaper Management for Terminal Services), ProSystem *fx* Engagement Terminal Services Database, and ProSystem *fx* Engagement Administrator Workstation.

Installation Considerations for Terminal Services Database

Keep the following in mind when installing Terminal Services Database:

- The Terminal Services Database should be installed to a static location that is accessible for all of the load balanced servers. This location should be a dedicated Windows 2003 or 2008 server with enough space to store data being created in the Terminal Services Client module.

- The recommended location is the main office server where the ProSystem *fx* Engagement Administrator is installed. The Terminal Services Database installation must be performed at the server console of the computer it is to reside on.

Terminal Services Installations

This section provides installation instructions for ProSystem *fx* Engagement Terminal Services Database, Terminal Services Client, or Administrator Workstation on a Windows Terminal Services enabled server.

1. Complete all tasks in the *Pre-Installation Checklist* on page 10.

2. Determine that no one is accessing the Terminal Services server.

3. Insert the ProSystem *fx* Engagement DVD.

4. Open Control Panel and select **Add/Remove Programs\Add New Programs** on Server 2003.

5. Click **CD or Floppy**, and then click **Next**. The *Install Program from Floppy Disk or CD-ROM* dialog displays.

6. Click **Next**. The *Run Installation Program* dialog displays.

7. If an Engagement SQL Instance is already installed, skip to step 15.

   If an Engagement SQL Instance is not already installed, do one of the following:

   - Install Microsoft SQL Server 2005 or 2008 Standard or Enterprise edition as explained in the *ProSystem fx Engagement Networking Best Practices* document, and then skip to step 15.

   - Install Microsoft SQL Express 2005 or Microsoft SQL Express 2008, which are included on the Engagement disc. To install SQL Express 2005 or 2008, continue to step 8.

8. Click Browse and locate the **ProSystem fx SQL 2005 Instance Installer.msi** (Vista or Server 2008 users locate **ProSystem fx SQL 2005 Instance Installer.exe** or **ProSystem fx SQL 2008 Instance Installer.exe**).

9. Click **Finish**. The SQL 2005 or SQL 2008 Instance Installer wizard displays.

10. Click **Next**. The *Ready to Install the Program* page displays.

11. Click **Install**. Several status screens display as the SQL Instance is installed.

12. Click **Finish**.

13. Click **CD or Floppy**, and then click **Next**. The *Install Program from Floppy Disk or CD-ROM* dialog displays.

14. Click **Next**. The *Run Installation Program* dialog displays.

15. Click **Browse** and locate the *PfxEngSetup.exe* file.

16. Click **Finish**. The *Welcome* dialog displays.

    Note: If you do not have Adobe Reader version 7.0 or later, you are given the opportunity to install it. You need Adobe Reader to view the *Installation Guide* or *Release Bulletin* in step 19 of this procedure. You also need Adobe Reader to view the *ProSystem fx Engagement User Guide* via Help/User Guide. Click **Yes** to continue installing ProSystem *fx* Engagement without Adobe Reader. Click **No** to cancel the installation and install Adobe Reader 7.0 or later. Adobe Reader 8.0 is included on the Engagement Installation Disk.

17. Click **Next**. The *License Agreement* dialog displays.

18. Read the license agreement. If you agree to the terms, select **I accept the terms in the license agreement** and click **Next**. The *Install Guide and Release Bulletin* dialog displays.

19. Click **Install Guide** to view a PDF of the *Installation Guide*. Click **Release Bulletin** to view the Release Bulletin for ProSystem *fx* Engagement.

20. Click **Next**. The *Custom Setup* dialog displays.

21. Select the program feature to install: Terminal Services Database, Terminal Services Client, or Administrator Workstation. Click the **plus sign** (+) to select or deselect subfeatures to install, or choose *This feature, and all subfeatures, will be installed on local hard drive*. Deselect Workpaper Management, which is selected by default.

    Note: Microsoft Office 2003 Professional with Service Pack 2 or a later version of Microsoft Office is required in order to install ProSystem *fx* Knowledge Tools. For new installations of Engagement, the Professional edition is required. If you are upgrading from a prior Engagement version, then another edition of Office 2003 (such as Standard) is allowed if it is already installed. If a prior version of Office is detected, the Knowledge Tools subfeature of Terminal Services Client is not available for installation.

22. If you are installing Terminal Services Client, click **Next** to display the *Terminal Services Database Location* dialog. Enter the name of the server where the database is installed.

23. Click **Next**. The *Ready to Install* screen displays.

Notes:

- If you attempt to install conflicting applications, InstallShield displays a message specifying the conflicting applications. Click **Back** to make the necessary changes.

- If your system does not meet the requirements for the application you are installing, InstallShield displays the *Requirements* dialog, listing the necessary components. Click **Cancel** to install the necessary components, or click **Back** to change the application to install.

24. Click **Install**. The *Installing ProSystem fx Engagement* status bar displays as InstallShield completes the installation. The *InstallShield Wizard Completed* dialog displays.

Note: If you are installing Terminal Services Client with ProSystem *fx* Knowledge Tools selected, and Microsoft Office 2003 or Office 2007 Primary Interop Assemblies (PIA) and Visual Studio 2005 Tools for Office Runtime (VSTOR) are not installed on your computer, the respective progress bars for these components display.

25. Click **Finish**, then complete any applicable tasks in the *Post-Installation Checklist* on page 14.