Windows Server 2012 Server Preparation

System Requirements

• Server Name contains only alphanumeric characters and dashes (a-z, A-Z, 0-9, -)

http://support.microsoft.com/kb/909264

• Supported hardware, Operating System, and software installed

http://support.cch.com/answerdoc.aspx?id=sw32486

- Assign a static IP addresses only, no DHCP
- Server's Fully Qualified Domain Name is stored in DNS
- Default Web Site or a created website must be available for the applications
 - A. Additional Requirements for Document Server without the Default Website Available

Add a New Private Internet Protocol (IP) Address to the Server

Create a Named Web site and Assign the New IP Address to that Web site

Setup DNS for the Named Website to resolve to the Private IP Address assigned to it.

- Turn OFF Windows Firewall if a Network Firewall is available (instructions below)
- Make the link to run the OP wizard as a trusted site in your central site browser
- Turn On Network Discovery

https://support.microsoft.com/en-us/kb/2722035

- Turn On File Sharing
- Member of your domain
- .Net 4.5.2 is installed before upgrade/migration

Document Domain Service account

This domain service account will be used to install the ProSystem fx Document application and run the application after installation

- An active SMTP email account
- Username and password contain only alphanumeric characters and dashes (a-z, A-Z, 0-9, -)
- Due to the complexity of the application, it is not recommended to change this service account's password after the installation. Select a complex and secure password for this account that abides by the rule above.
- 'User cannot change password' and 'Password never expires' settings enabled
- A member of the Domain Users group
- A member of the local-machine's Built-in Administrators group on the ProSystem fx Document Server, SQL Server, File Server and the test workstation
- Change/Modify permissions via Share/NTFS Security to the...

Document storage areas

ProSystem fx Tax PDF folder

• User credentials need to be made available with 'logged on as service' privileges

Required Roles and Features

1. Open Server Manager on the upper right select Manage and Add Roles and Features.

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€∋- Server N	lanager • Dashboard						Tools View Help
Dathboard	WELCOME TO SERVER MANAGER					Remove Roles and Features	
Local Server						Add Servers Create Server Group	
All Servers	1 Conf	iqure this local server				Server Manager Properties	
App Server	Com	igure triis local server					
■ File and Storage Services ▷	QUICK START	ld roles and features					
	3 Ad	ld other servers to manage					
	WHAT'S NEW 4 CR	eate a server group					
							Hide
	LEARN MORE						
	ROLES AND SERVER GROUPS						
	Koles: 3 Server groups: 1 Servers tota	- File and Storage					
	App Server 1	Services 1	IS 1	Local Server 1	All Servers 1		
	Manageability	Manageability	 Manageability 	Manageability	Manageability		
	Events	Events	Events	Events	Events		
	Services	Services	Services	3 Services	3 Services		
	Performance	Performance	Performance	Performance	Performance		
		BPA results	BPA results	BPA results	BPA results		
				11/2/2015 7:54 AM	11/2/2015 7:54 AM		

2 Click Next

a	Add Roles and Features Wizard
Before you begin	DESTINATION SERVER DocumentOP2012.Support.ICTCCHLab.local
Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	This wizard helps you install roles, role services, or features. You determine which roles, role services, or features to install based on the computing needs of your organization, such as sharing documents, or hosting a website. To remove roles, role services, or features: Start the Remove Roles and Features Wizard Before you continue, verify that the following tasks have been completed: • The Administrator account has a strong password • Network settings, such as static IP addresses, are configured • The most current security updates from Windows Update are installed If you must verify that any of the preceding prerequisites have been completed, close the wizard, complete the steps, and then run the wizard again.
	To continue, click Next.
	< Previous Next > Install Cancel

3. Make sure the radio button: Role-based or feature-based installation

Destination type Destination server Before You Begin Server You Begin Installation Type Server Selection Server Selection Server Roles Features Configure a single server by adding roles, role services, and features. Configure a single server by adding roles, role services, and features. Server Roles Server Selection Results Server Betting Configure a single server by adding roles, role services, and features. Server Selection Server Selection Server Roles Server Selection Results Server Betting Server Selection Server Selection Server Roles Server Selection Server Roles Server Selection Server Selection Server Selection Server Selection Server Selection Server Serv	B	Add Roles and Features Wizard
	Before You Begin Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	Add Roles and Features Wizard
< Previous Next > Install Cancel		< Previous Next > Install Cancel

4. Select the radio button 'Select a server from the server pool' and click next

a	Add Roles	and Features V	Vizard 📃 🗖 🗙
Select destinatior	n server		DESTINATION SERVER DocumentOP2012.Support.ICTCCHLab.local
Before You Begin	Select a server or a virtual h	ard disk on which	to install roles and features.
Installation Type	 Select a server from the 	server pool	
Server Selection	 Select a virtual hard disk 	c	
Server Roles	Server Pool		
Features			
Confirmation	Filter:		
Results	Name	IP Address	Operating System
	DocumentOP2012.Supp	10.154.52.43	Microsoft Windows Server 2012 R2 Standard
	1 Computer(s) found		
	This page shows servers the Add Servers command in Se collection is still incomplete	at are running Wine erver Manager. Off e are not shown.	lows Server 2012, and that have been added by using the line servers and newly-added servers from which data
		< Pre	vious Next > Install Cancel

- 5. Expand Application Server and check the following:
- A. COM+ Network Access
- B. Windows Process Activation Service Support
 - o HTTP Activation
 - o Message Queuing Activation
- C. Distributed Transactions
 - o Incoming Remote Transaction
 - o Outgoing Remote Transaction
- D. .Net Framework 4.5



- 6. Expand Web Server (IIS) and check the following:
- A. Performance
 - o Static Content Compression
- B. Management Tools
 - o IIS Management Console
 - o IIS 6 Management Compatibility



- 7. Click next and select the following features:
- A. NET Framework 3.5 and 4.5 Features
- B. Message Queuing
- C. SMTP Server

P	Add Roles and Features Wizard	_ D X
Select features		DESTINATION SERVER DocumentOP2012.Support.ICTCCHLab.Jocal
Before You Begin	Select one or more features to install on the selected server.	
Installation Type	Features	Description
Server Selection Server Roles Features Confirmation Results		Message Queuing provides guaranteed message delivery, efficient routing, security, and priority-based messaging between applications. Message Queuing also accommodates message delivery between applications that run on different operating systems, use dissimilar network infrastructures, are temporarily offline, or that are running at different times.
	< Previous Next	> Install Cancel

8. Click next until you get to the Confirmation screen then choose install.

Listed should be all the items chosen in prior screens.

Confirm installati Before You Begin Installation Type Server Selection Server Roles Features	ON SELECTIONS To install the following roles, role services, or Restart the destination server automatic Optional features (such as administration too been selected automatically. If you do not wa their check boxes. Web Server (IIS)	DESTINATION SERVER DocumentOP2012.Support.ICTCCHLab.local features on selected server, click Install. ally if required ols) might be displayed on this page because they have ant to install these optional features, click Previous to clear
Results	Web Server Health and Diagnostics Custom Logging	
	Specify an alternate source path	evious Next > Install Cancel

9. After installing roles it is recommended that Windows is current on updates.

Turning Off Windows Firewall

- 1. Open Server Manager
- 2. Click on Tools and open Windows Firewall with Advance Security
- 3. Click on Windows Firewall Properties



4. Turn off Domain Profile, Private Profile, and Public Profile if firewall is managed by network firewall.

Configuring MSDTC

- 1. Open Server Manager
- 2. Click Tools at the upper right corner and choose Component Services
- 3. Expand the Component Services down to Distributed Transaction Coordinator
- 4. Right click on Local DTC and select Properties.



- 5. Click the security tab
- 6. Select the Network DTC Access check box
- 7. Transaction Manager Communication should be set to Allow Inbound and Allow Outbound
- 8. Select the No Authentication Required radio button

Local DTC Properties ? X
Tracing Logging Security
Security Settings Network DTC Access Client and Administration Allow Remote Administration
Transaction Manager Communication Image: Communication
 Mutual Authentication Required Incoming Caller Authentication Required No Authentication Required
Enable XA Transactions Enable SNA LU 6.2 Transactions
DTC Logon Account Account: NT AUTHORITY\NetworkService Browse Password:
Confirm password:
OK Cancel Apply

9. Select OK

SQL Server Preparation

This applies to firms with SQL hosted on a separate server

Required Roles and Features

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Server M	anager 🔸 Dashboard					Tools View Help
Dashboard	WELCOME TO SERVER MANAGER				Remove Roles and Features	
Local Server					Add Servers Create Server Group	
All Servers	1 Configure this lo	cal server			Server Manager Properties	
File and Storage Services IS	QUICK START 2 Add roles and fea	tures				
	3 Add other server	s to manage				
	4 Create a server g	roup				
	_					
	LEARN MORE					nice
	ROLES AND SERVER GROUPS Roles: 3 Server groups: 1 Servers total: 1					
	App Server 1	I Storage 1	1 Local Server 1	All Servers 1		
	Manageability Manage	ability () Manageability	Manageability	Manageability		
	Events Events	Events	Events	Events		
	Performance Perform	ance Performance	3 Services Performance	3 Services Performance		
	BPA rest	Its BPA results	BPA results	BPA results		
			11/2/2015 7:54 AM	11/2/2015 7:54 AM		

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	Before You Begin Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	Add Roles and Features Wizard
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b	Add Roles	and Features V	Vizard 🔄 🗖 🗙
Select destinatior	n server		DESTINATION SERVER DocumentOP2012.Support.ICTCCHLab.local
Before You Begin	Select a server or a virtual l	hard disk on which	to install roles and features.
Installation Type	 Select a server from the 	server pool	
Server Selection	O Select a virtual hard dis	k	
Server Roles	Server Pool		
Features			
Confirmation	Filter:		
Results	Name	IP Address	Operating System
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Local DTC Properties ? X
Tracing Logging Security
Security Settings Image: Security Secu
Transaction Manager Communication Image: Allow Inbound Image: Mutual Authentication Required Image: Incoming Caller Authentication Required Image: No Authentication Required
Enable XA Transactions
DTC Logon Account Account: NT AUTHORITY\NetworkService Browse Password: Confirm password:
Learn more about <u>setting these properties</u> .
OK Cancel Apply

9. Select OK