

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

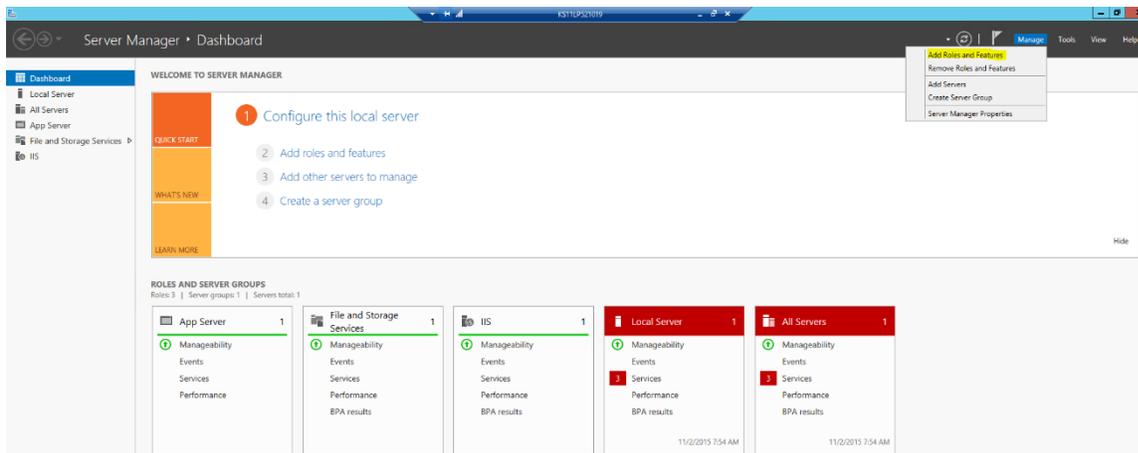
Document Domain Service account

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

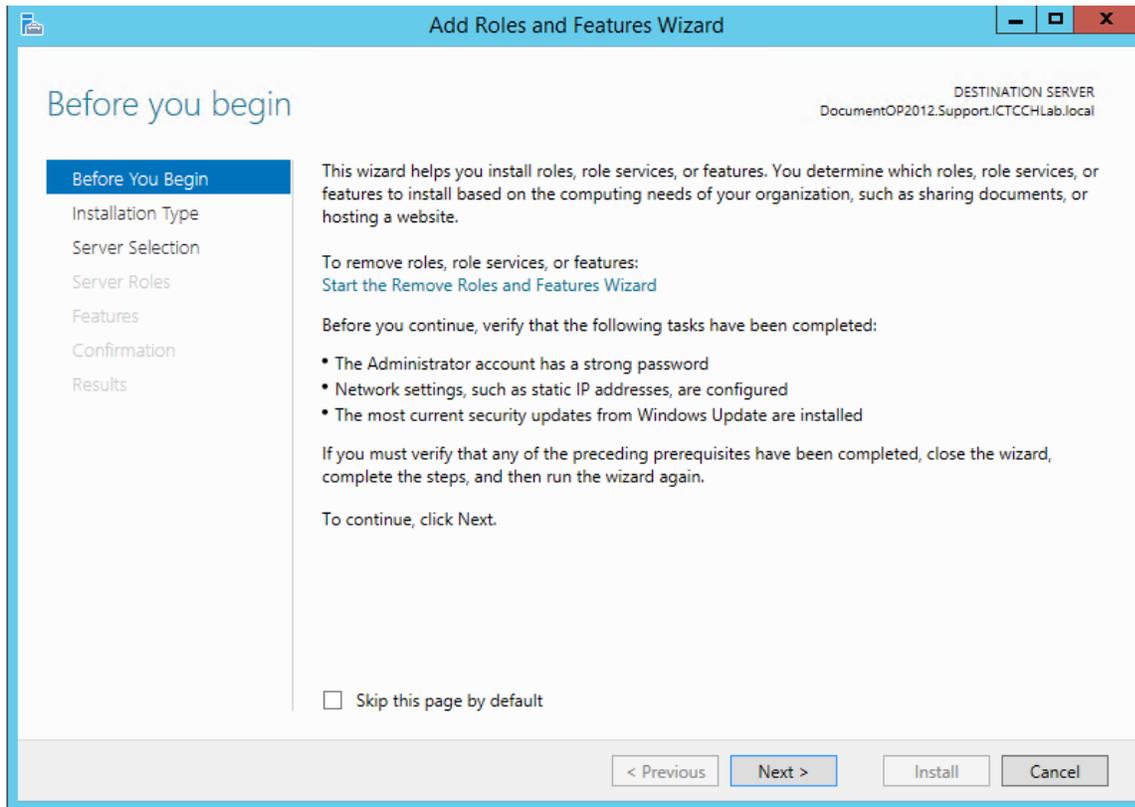
- An active SMTP email account
- Username and password contain only alphanumeric characters and dashes (a-z, A-Z, 0-9, -)
- Due to the complexity of the application, it is not recommended to change this service account's password after the installation. Select a complex and secure password for this account 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

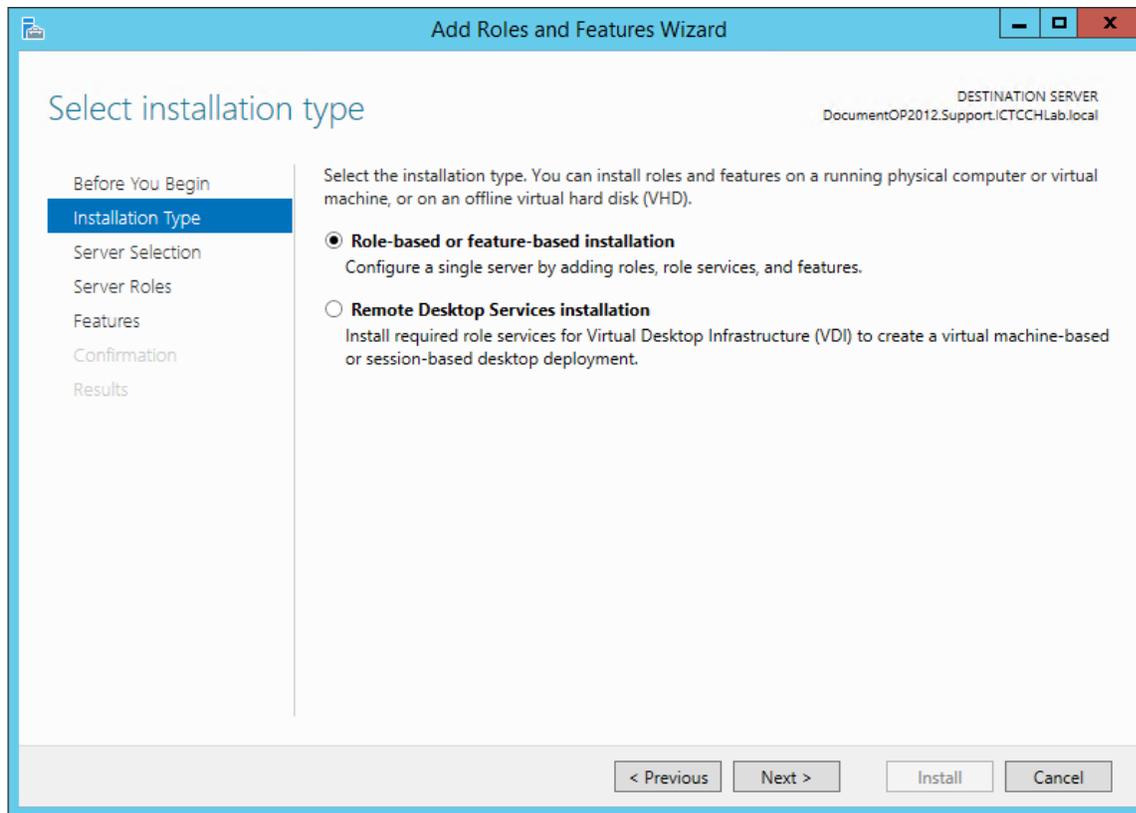
1. Open Server Manager on the upper right select Manage and Add Roles and Features.



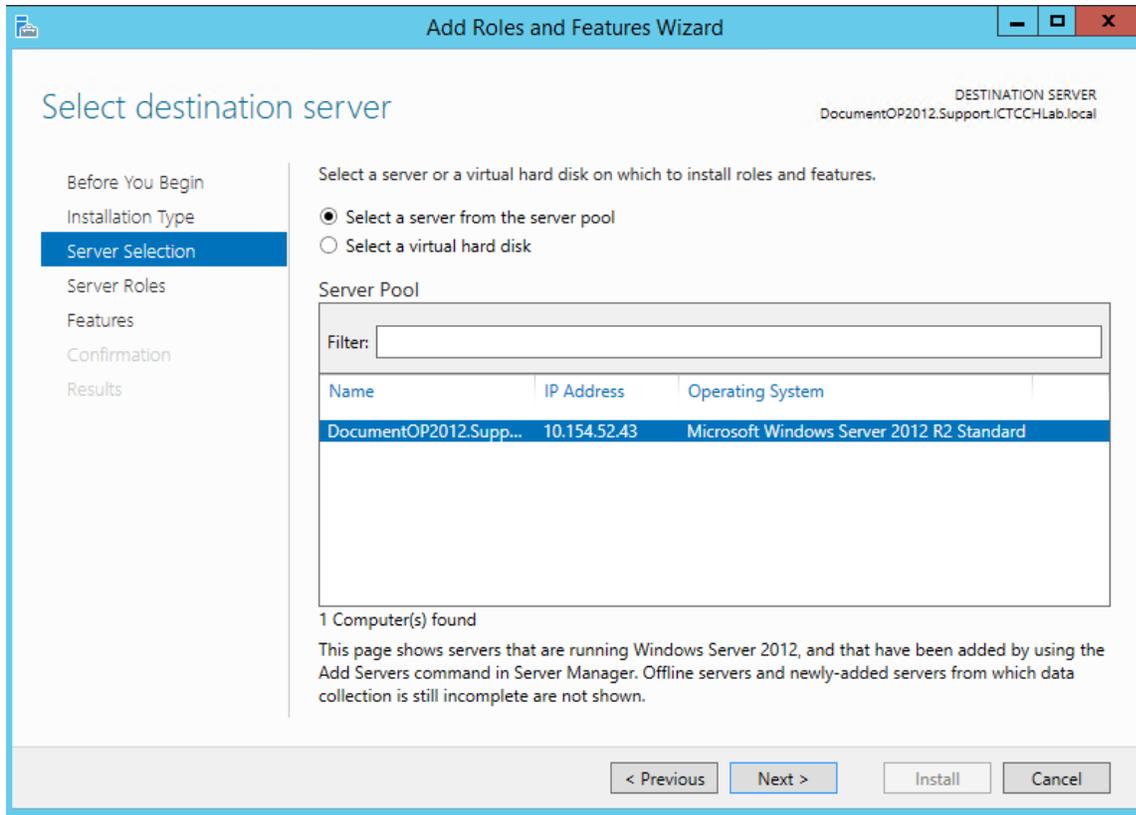
2 Click Next



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

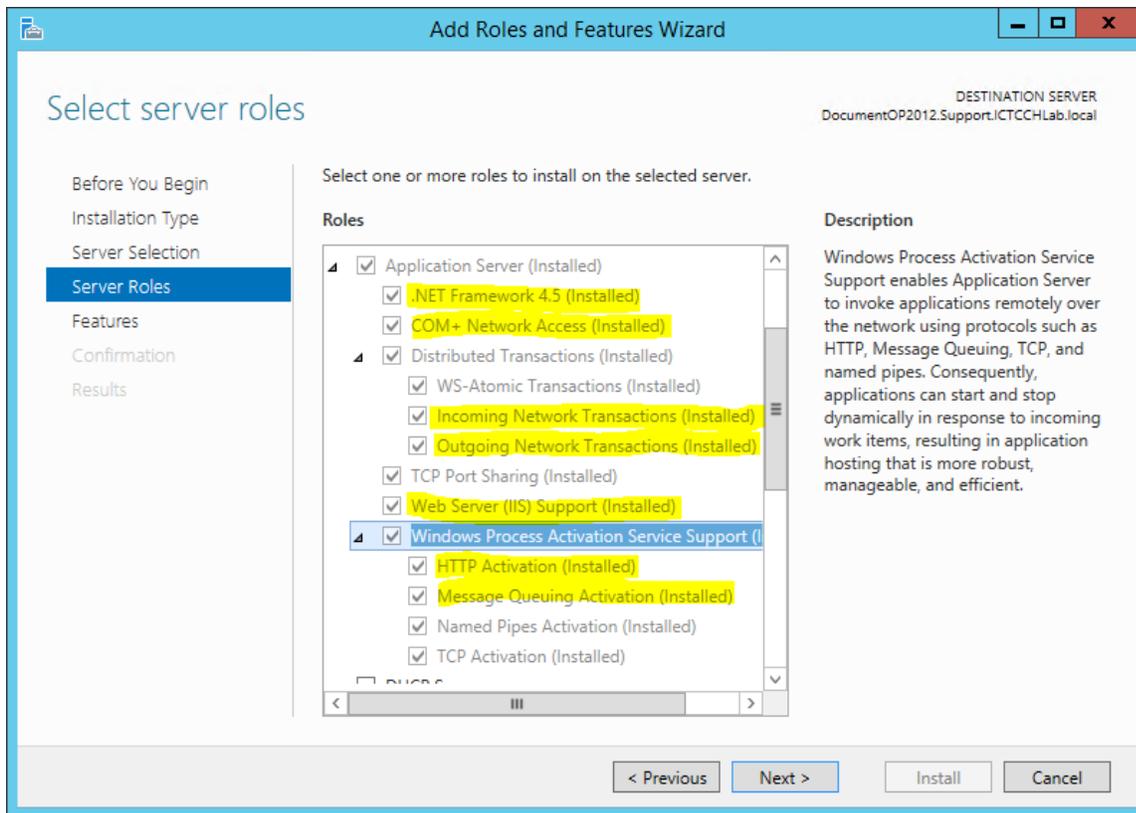


4. Select the radio button 'Select a server from the server pool' and click next



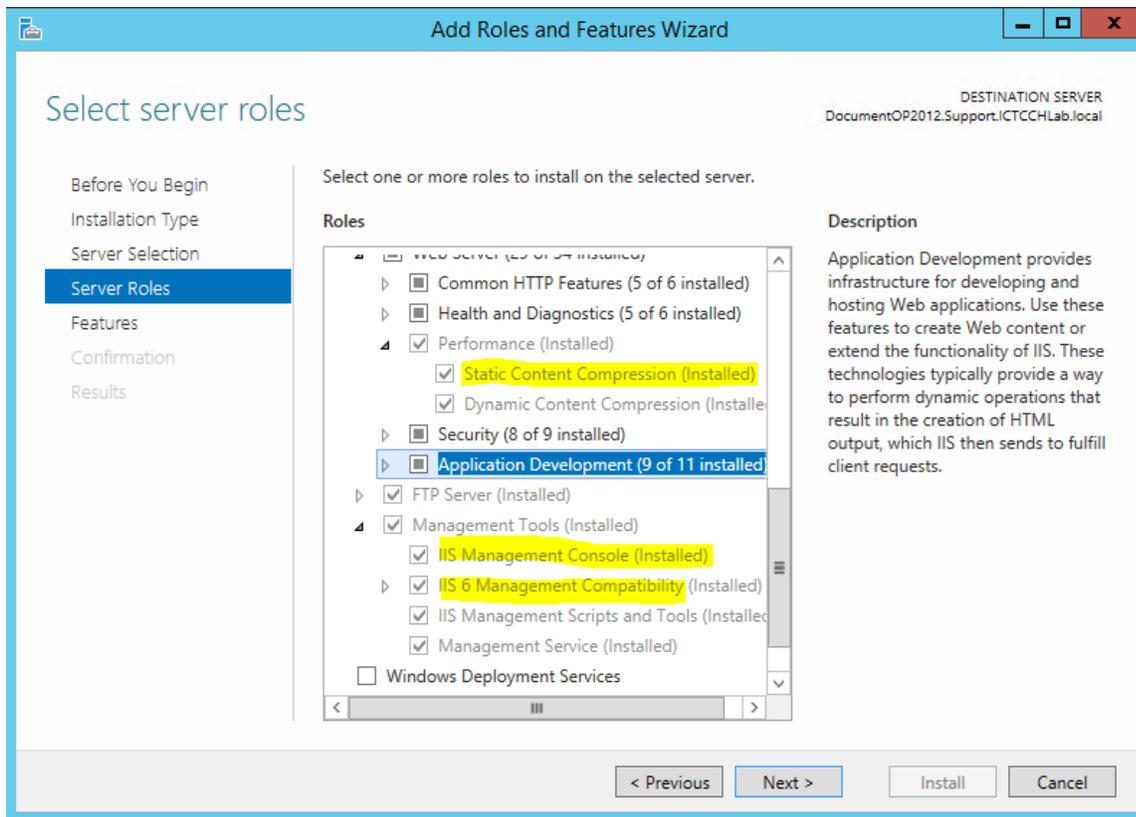
5. Expand Application Server and check the following:

- 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



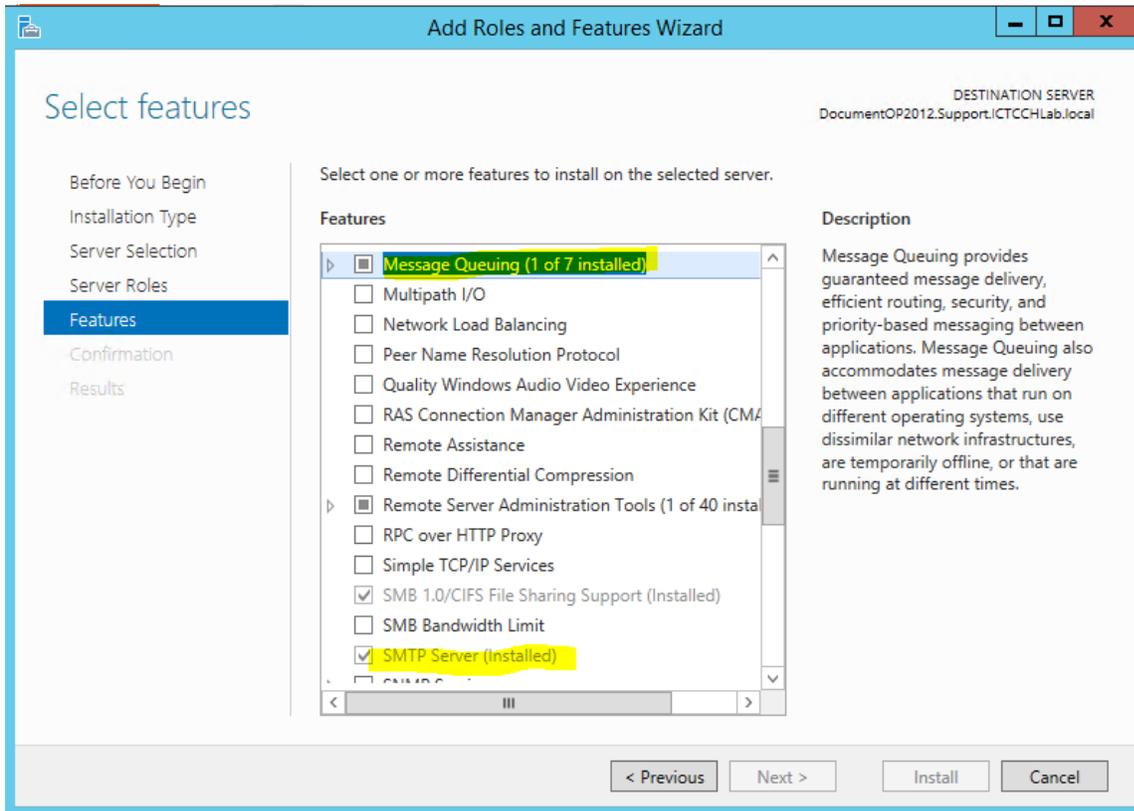
6. Expand Web Server (IIS) and check the following:

- A. Performance
 - o Static Content Compression
- B. Management Tools
 - o IIS Management Console
 - o IIS 6 Management Compatibility



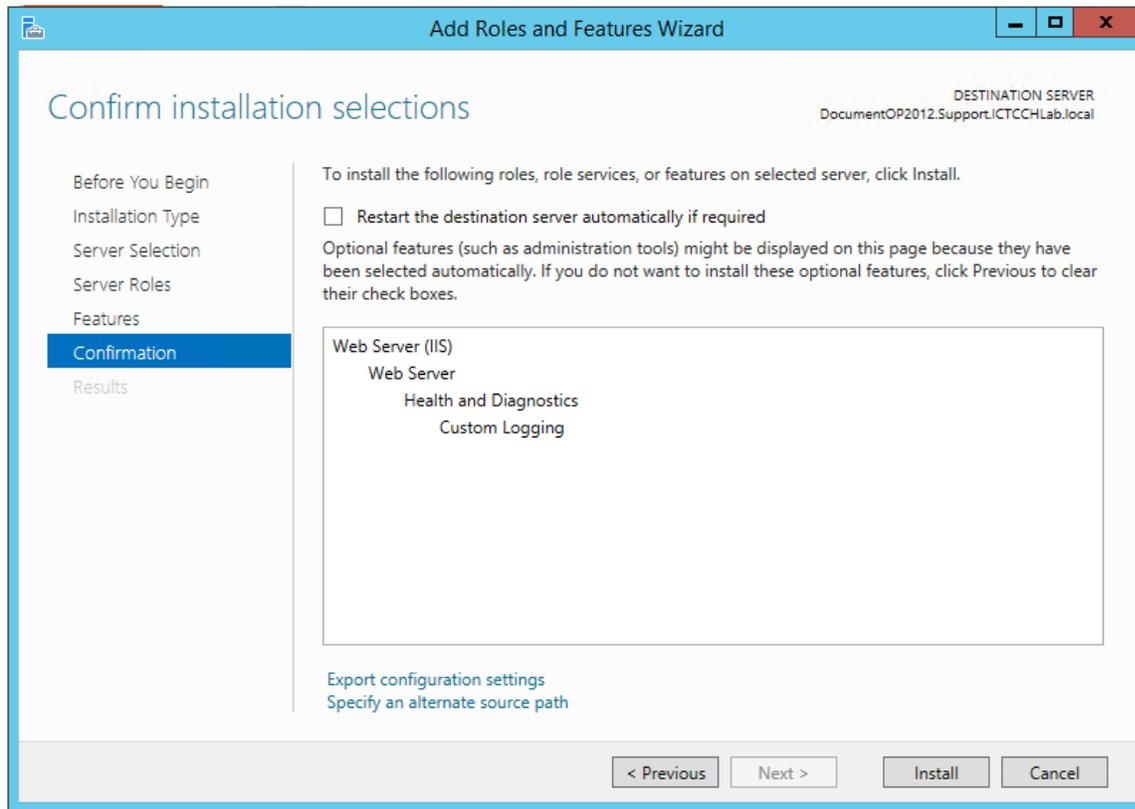
7. Click next and select the following features:

- A. NET Framework 3.5 and 4.5 Features
- B. Message Queuing
- C. SMTP Server



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

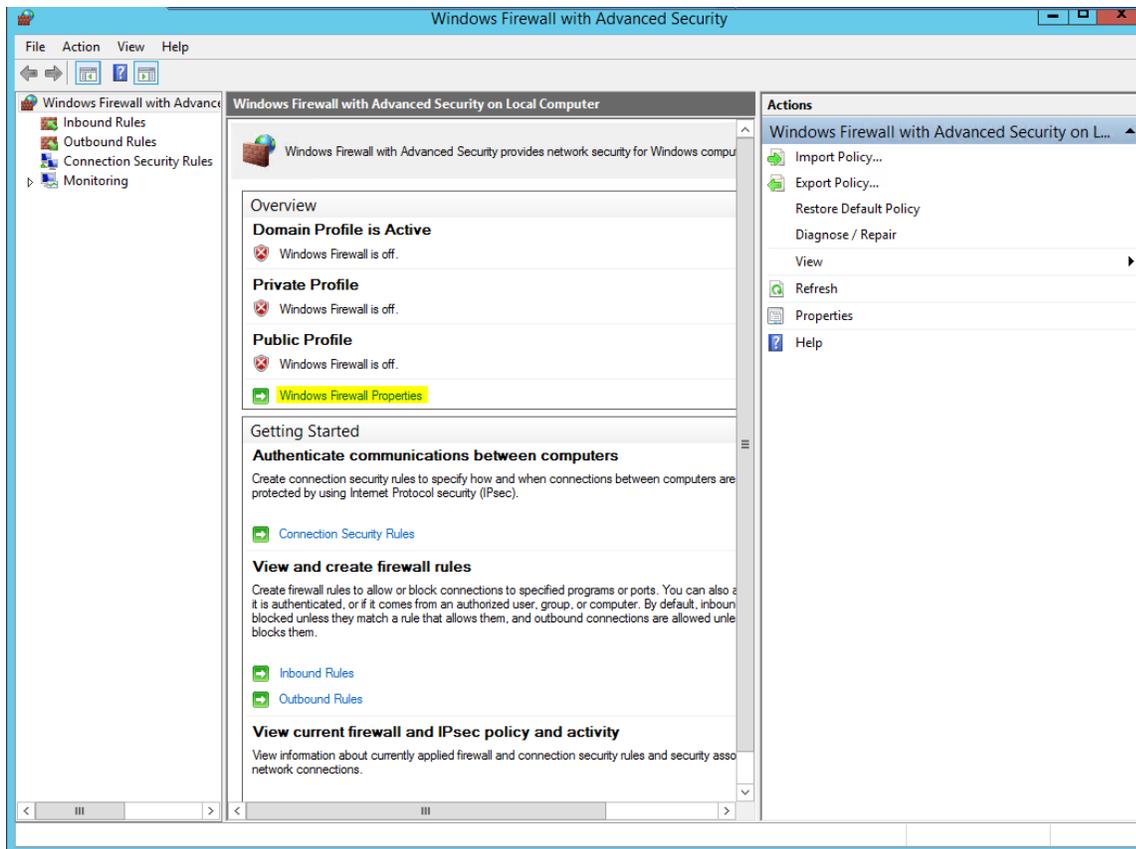
Listed should be all the items chosen in prior screens.



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

Turning Off Windows Firewall

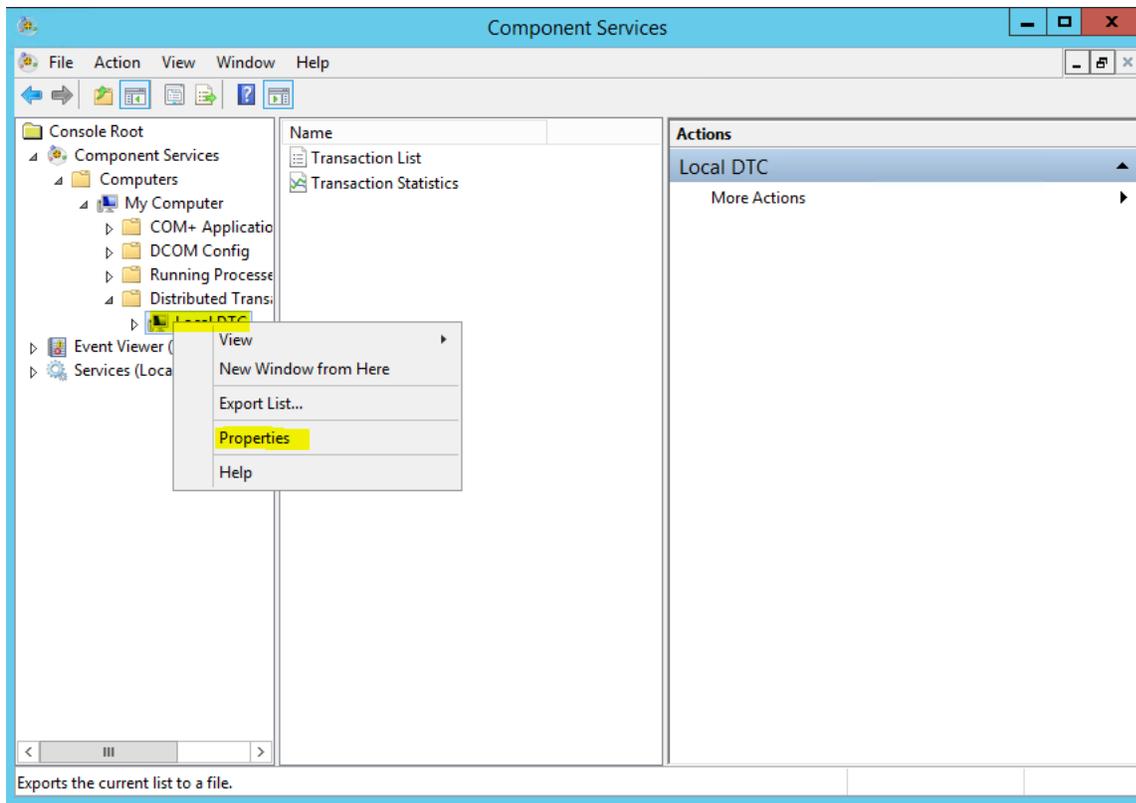
1. Open Server Manager
2. Click on Tools and open Windows Firewall with Advance Security
3. Click on Windows Firewall Properties



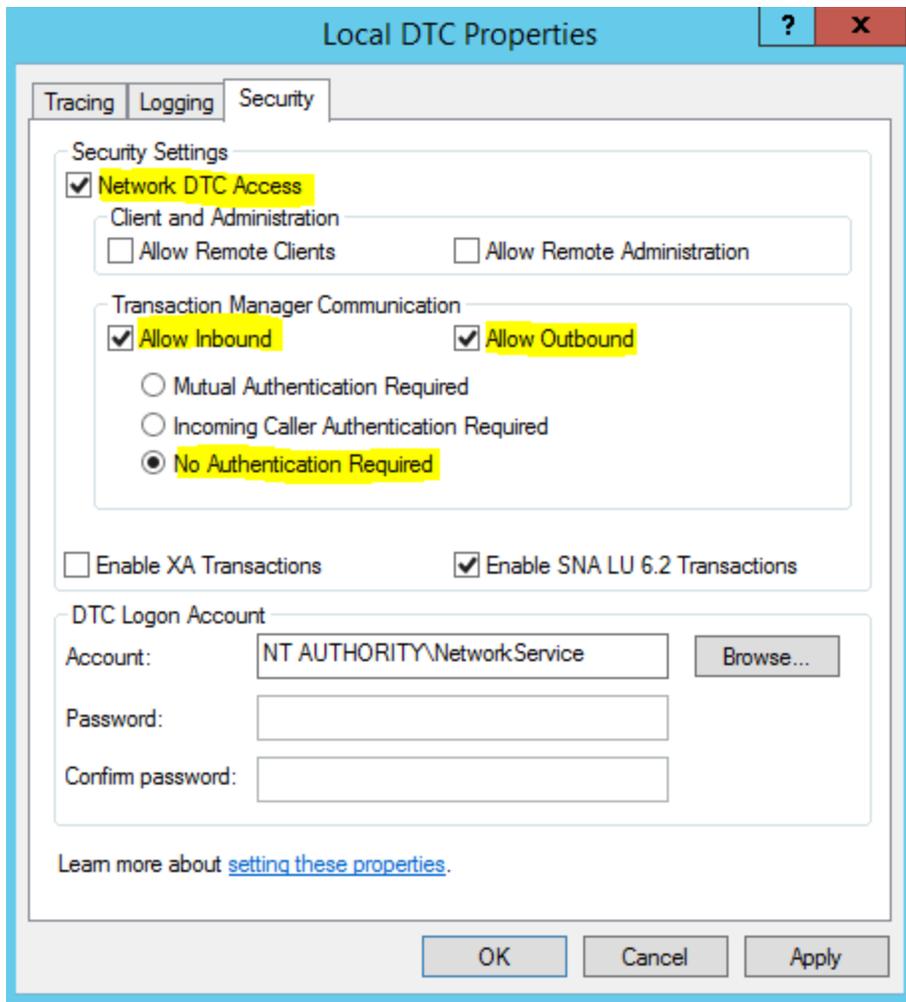
4. Turn off Domain Profile, Private Profile, and Public Profile if firewall is managed by network firewall.

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



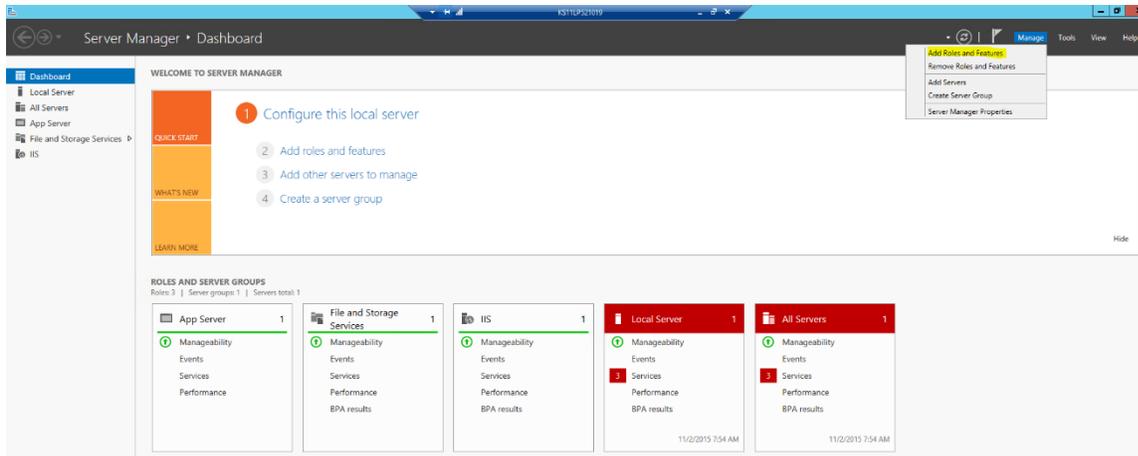
9. Select OK

SQL Server Preparation

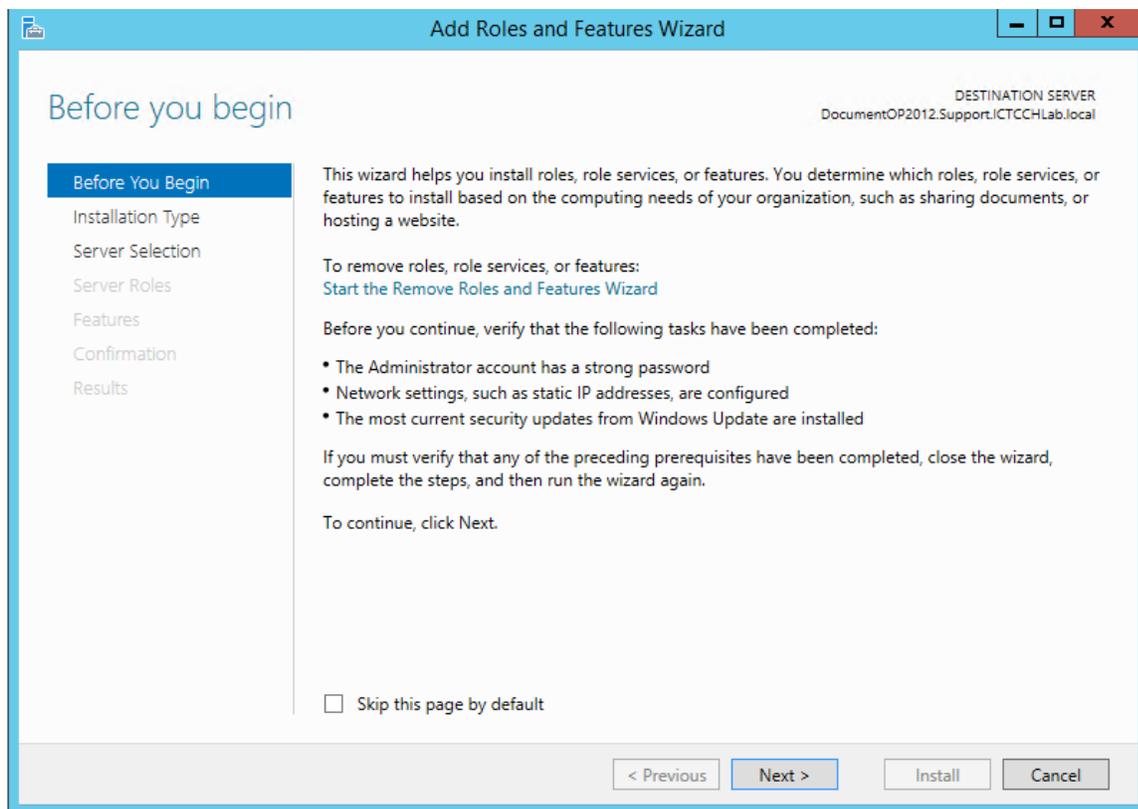
This applies to firms with SQL hosted on a separate server

Required Roles and Features

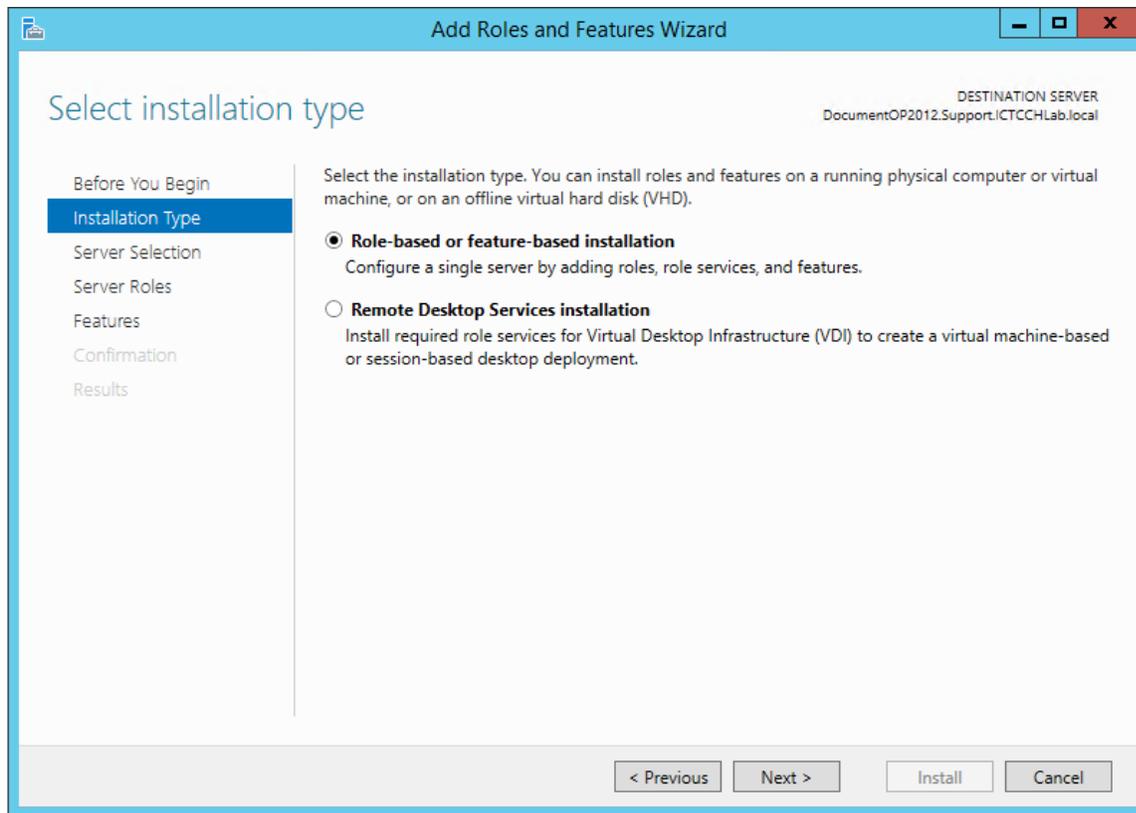
1. Open Server Manager on the upper right select Manage and Add Roles and Features.



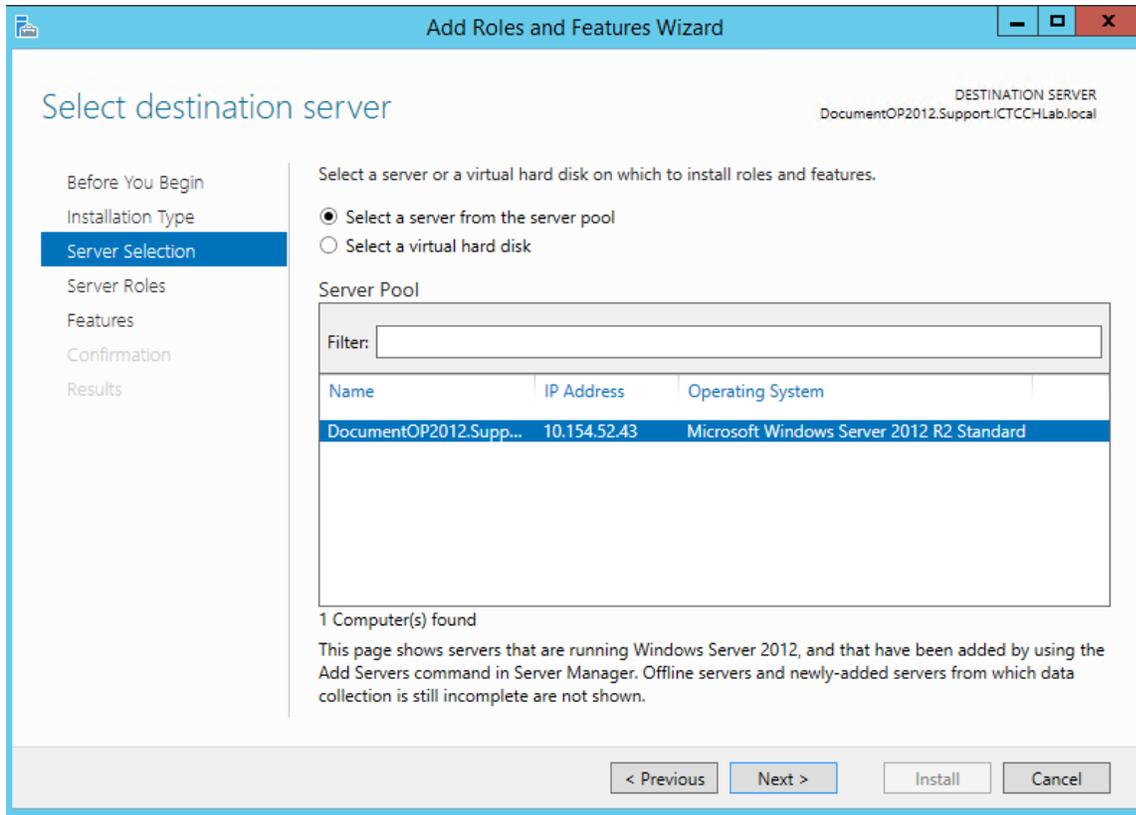
2 Click Next



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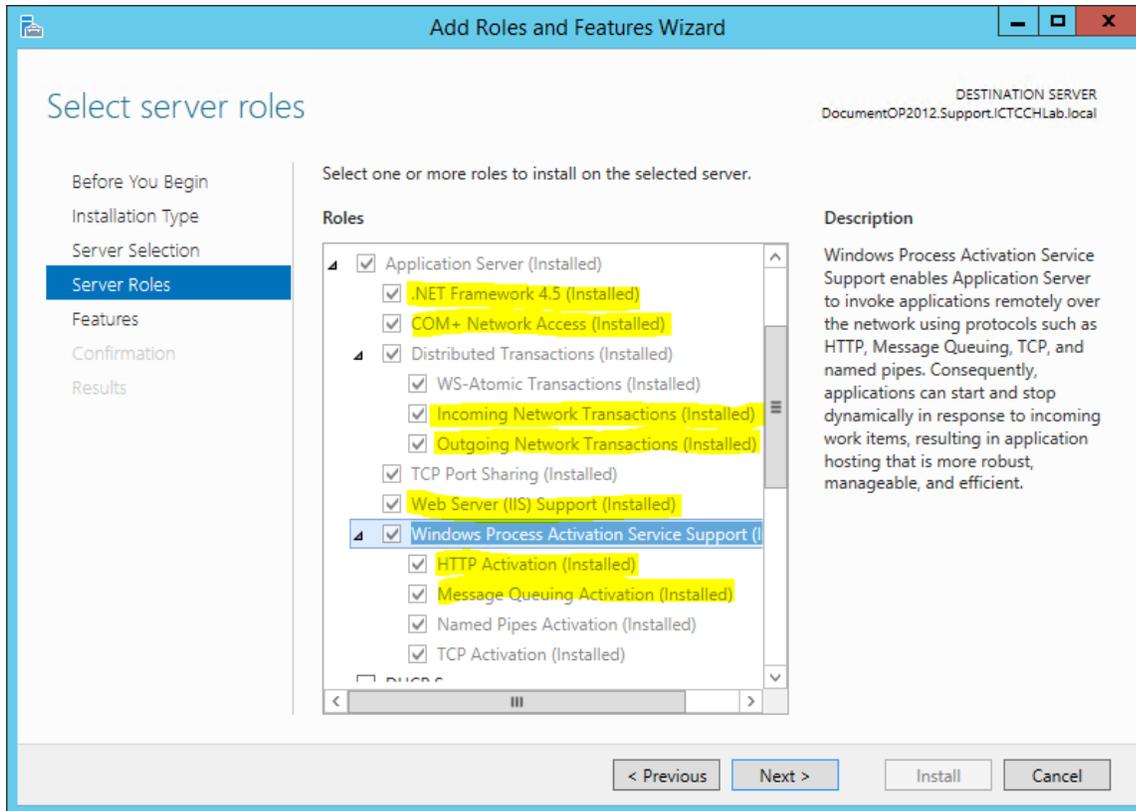


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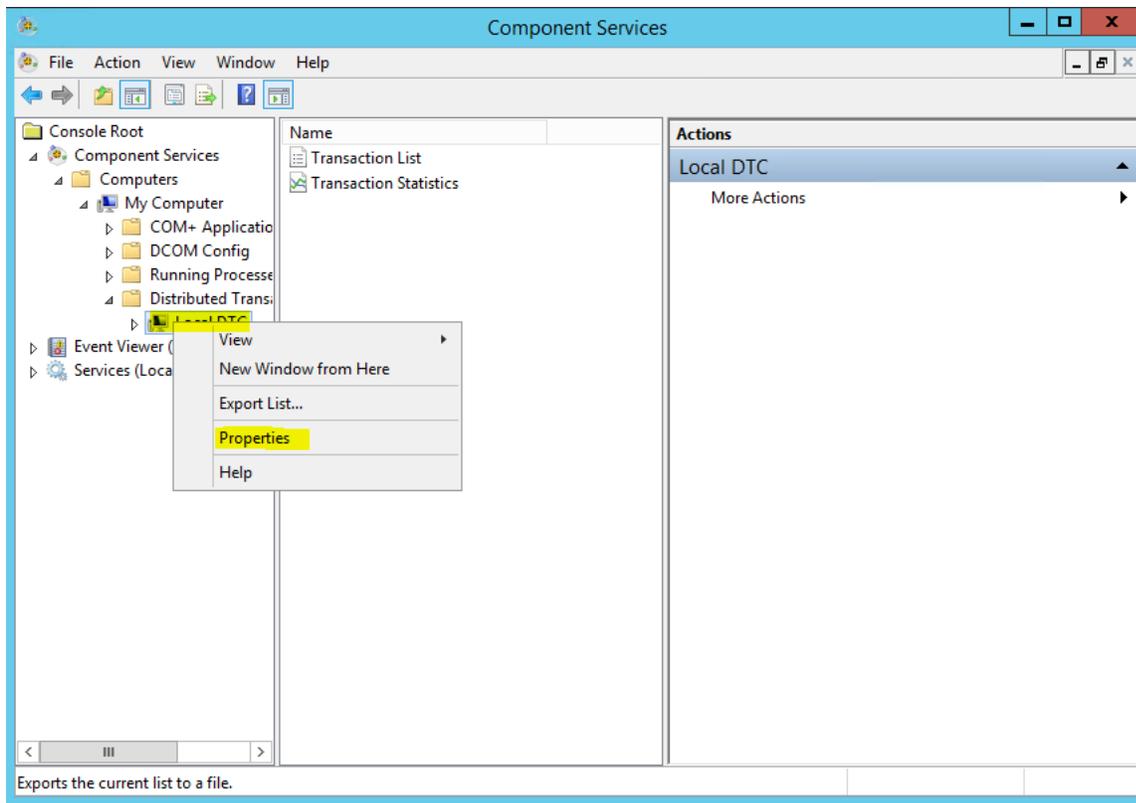
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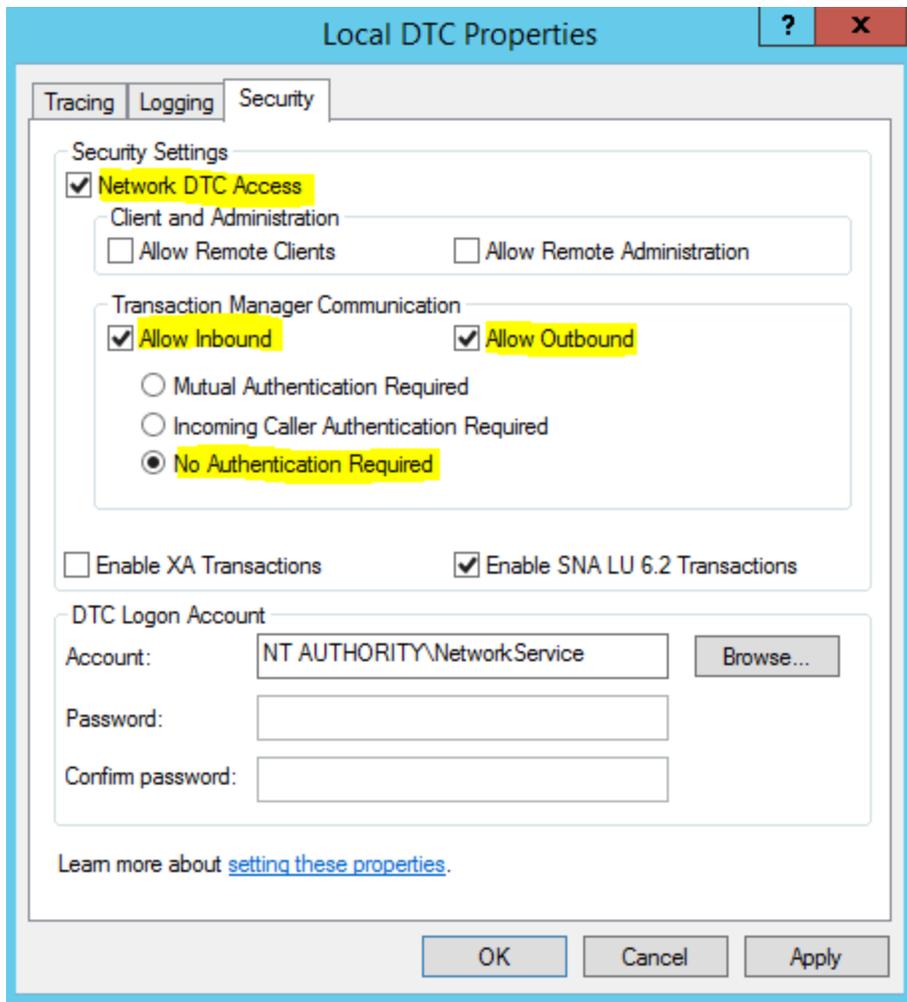


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9. Select OK

