ProSystem fx[®] Engagement

Networking Best Practices Guide

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Overview

The purpose of this document is to provide a technical background for a better understanding of how ProSystem *fx* Engagement functions internally. This document, along with the Installation Guide and the User Guide, should help avoid certain pitfalls or obstacles. The instructions in this document are intended for use by network administrators and IT professionals only. Please consult Engagement Technical Support for any technical questions.

General Program Information

Computer Names

ProSystem *fx* Engagement relies on the NetBIOS computer name for most of the internal program communications.

- NetBIOS requires computer names to be a maximum of 15 characters.
- It is strongly recommended you do not rename your computer, for any reason, after installing ProSystem *fx* Engagement.
 - Doing so may cause serious issues in the program.
 - If you have renamed or modified the computer name after Engagement is installed and are experiencing issues, contact Technical Support at (800) 739-9998 option 4.
- Due to possible data loss and installation issues and serious issues with the program, imaging machines with Engagement and the SQL instance for Engagement already installed is not supported.

TCP/IP

ProSystem fx Engagement and SQL rely on TCP/IP for network and system connections.

- Internet Protocol Version 4 (IPv4) is supported.
- Internet Protocol Version 6 (IPv6) is not currently supported.

Services

ProSystem *fx* Engagement uses three services for communication between the local file rooms and the office servers as well as between the office servers. The services are as follows:

- SQL Server (PROFXENGAGEMENT)
- PFXEngDesktopService
- PFXSYNPFTService

Note: PfxPDFConvertService.exe is also running in the background and is started at the startup of the machine. This executable handles ProSystem *fx* Engagement PDF printing.

SQL – This service is the SQL data engine that is used to drive the ProSystem *fx* Engagement database. SQL runs as a service, "SQL Server (PROFXENGAGEMENT)," using a Local System account that requires full security rights. In ProSystem *fx* Engagement this service will transfer data from workstation database to server database, server database to server database and workstation database to workstation database over TCP/IP.

If for any reason the SQL Server (PROFXENGAGEMENT) service is not running, both the Administrator and Client modules will stop working and the users will be instructed to close the program. By default this service will start up when the computer starts and remain on until it is either manually stopped or the computer is shut down.

The SQL Server (PROFXENGAGEMENT) service is a memory intensive service that will utilize as much memory as is available to complete the requests it receives. The memory will be released back to the system as the computer needs the memory for another process. We recommend that you reboot your workstation daily in order to free up any memory that is being accessed but not used. Installing additional memory may also improve performance.

For servers where the Admin module is installed, we recommend that you develop a schedule where you restart the SQL Server (PROFXENGAGEMENT) service so it will release the memory.

PFXEngDesktopService.exe – This is the service that ProSystem *fx* Engagement uses to initiate a refresh of the remote Workpaper Management or Administrator module. This service interacts with the desktop of the workstation or server it is running on. Because the service interacts with the desktop, the service runs under the system account and cannot be changed without rendering the service ineffective.

PFXSYNPFTService.exe – This service is used to copy or move the workpapers from the LFR to the CFR, from CFR to CFR or from LFR to LFR. This service runs under the system account by default but can be changed as needed. If you store your workpapers on a location other than the server where the Administrator Module is installed, you will need to change the user account to a user that has access to that location.

For more information, please see the Workpaper Location User Rights section.

Ports

ProSystem fx Engagement transfers data over the following ports:

- SQL Server (PROFXENGAGEMENT) TCP port 2029; UDP port 1434
- PFXEngDesktopService TCP port 6736
- PFXSYNPFTService TCP port 6735
- PfxConfigUtility UDP port 6737

These ports are configured on the server and workstations during installation. However, if you are connecting over a VPN or through a firewall, or another device such as a router, you will need to ensure that these ports are opened in order for the program to work correctly.

Other SQL applications

If you are installing ProSystem *fx* Engagement on a computer which currently has an application using SQL as its database engine, you must stop the SQL service before installing ProSystem *fx* Engagement. When upgrading or reinstalling ProSystem *fx* Engagement, stop all other SQL services before upgrading but leave the SQL Server (PROFXENGAGEMENT) service running.

IMPORTANT: Failure to do this may cause one or both of the applications to fail.

Compressed drives and/or partitions

ProSystem *fx* Engagement does not support the storage of workpapers or databases on compressed drives, volumes, or partitions. Microsoft has determined that having SQL databases on compressed volumes may cause performance and database recovery issues. ProSystem *fx* Engagement uses SQL databases. Additionally, storing Engagement databases and/or workpapers on compressed volumes may cause installation failures, synchronization issues and data loss. Please see Microsoft Knowledge Base article ID <u>231347</u> for additional information, or use the following link: <u>http://support.microsoft.com/kb/231347/en-us</u>.

Installation in a Non-Windows Environment (Novell, Linux)

ProSystem *fx* Engagement utilizes the Microsoft SQL database architecture; however, Engagement is compatible with Non-Windows networks, including Novell and Linux, with one additional requirement: the SQL database engine application and database files must reside on a Windows computer and must be visible to the Non-Windows network. All workpapers, (Central File Rooms), may be stored on the Non-Windows file server.

There are a few specific steps which need to take place in order to ensure proper communication between the local file rooms and the available central file rooms. The following procedures will assist you in the setup process:

Requirement

The SQL database engine requires a computer with a Windows-based operating system (Windows Server 2003, Windows Server 2008, Windows XP Professional, Windows Vista, or Windows 7). The computer must meet the minimum requirements set forth in the User Guide or posted on the Engagement Support website. This computer will be used to house the Engagement office server and SQL databases.

Procedures

- 1. Read the installation instructions. The installation instructions can be found in Chapter 2 of the Engagement User Guide, on the Engagement CD within the Documents directory, or on the ProSystem *fx* Engagement Support website.
- 2. On the Non-Windows server, you will need to create a folder that will store the central file room workpapers.
- 3. Install ProSystem fx Engagement Administrator to the Windows computer defined above.
- 4. Login and setup this machine as an office server.
- 5. Follow the steps defined below under <u>Workpaper Location User Rights</u> to set up the synchronization service to run as needed for this configuration.
- 6. Create a central file room. When selecting the 'Location of central file room workpapers,' browse to the folder created on the Non-Windows server in Step 2.
- 7. On a separate workstation, install ProSystem *fx* Engagement Workpaper Management module.
- 8. Log into the Workpaper Management module and follow the prompts as they appear.
- 9. Once you have successfully logged in, test the above by synchronizing a binder to/from a central file room on the Non-Windows server.

Other Information

User Rights

The installation process sets the Engagement folder permissions automatically. These rights are needed for Engagement to function optimally. The installation gives the "Users" group all rights except Full Control. These rights are inherited by all child objects so that all folders and subfolders within Engagement receive these same rights.

Admin Share Folder

For logging purposes, the Administrator module writes to "x:\Pfx Engagement\Admin\Admin Share". Please note that the program will still work (Administrator actions may still be performed) even if the system cannot write to the log files. For logging and troubleshooting purposes, we strongly recommend that Admin users be given rights to this folder, which will allow the system to properly log all Administrator actions.

Domain Controllers

Due to issues with Admin Synch failures and transferring Transition Binder Packages between Office Servers, we strongly recommend against installing the ProSystem *fx* Engagement Administrator module on a Domain Controller. Additionally, installing the Engagement Administrator module on a Domain Controller puts the server into the role of being a database and file server. If the Domain Controller goes down, the Admin module and CFR's will not be available. Our recommendation is to use a separate server for the Admin Module.

Note: Microsoft does not recommend installing SQL Server 2005 or SQL Server 2008 on a Domain Controller. See the following:

http://msdn.microsoft.com/en-us/library/ms143506.aspx#DC_Support http://msdn.microsoft.com/en-us/library/ms143719(SQL.90).aspx http://msdn.microsoft.com/en-us/library/ms144228(SQL.90).aspx http://download.microsoft.com/download/5/0/e/50ec0a69-d69e-4962-b2c9-80bbad125641/ReadmeSQL2005.htm

Macro Security Settings Requirements for Excel and Word Addins

If the Very High macro security setting is selected in Excel or Word, the macros required for the Engagement addins will not function. We recommend setting the macro security to a setting that is lower than Very High.

Workpaper Location User Rights

ProSystem *fx* Engagement utilizes a service to transfer the workpapers from the LFR to the CFR that does not require the user to have rights to the CFR location.

The service is called PFXSYNPFTService.exe, referred to as the Pfx sync service. The Pfx sync service works by emulating File Transfer Protocol (FTP) and therefore only requires that the service itself have rights to the destination location. By default, the service runs under the Local System Account, which has full access to the local computer. However, if the workpaper location of the CFR is stored on another machine, the service will need to be configured to run under a user account that has "Full Control" rights to the destination location of the workpapers folder.

The first step in this process is to create a user on each server that has rights to all Engagement related directories and folders. Once you have a user on each server you will need to make the following modification on the office server (the server where the database files are located):

- 1. Open Administrative Tools from the Control Panel and select Services.
- 2. Once Services is open, find the PFXSYNPFTService listed in the Name Column.
- 3. Right click on the Service and select **Stop**.
- 4. Right click on the Service and select Properties.

STREETSCHEET	Properties (Local Computer)	
eneral Log On Rec	covery Dependencies	
Log on as:		
○ Local System accord	unt	
Allow service to	interact with desktop	
This account:	B	rowse
Password:	•••••	
Confirm password:		
	able this service for the hardware profiles li	sted below
You can enable or disa Hardware Profile Profile 1	able this service for the hardware profiles li Servic Enable	sted below ce
<u>r</u> ou can enable or disa Hardware Profile Profile 1	able this service for the hardware profiles li Servic Enable Enable	sted below ce cd Disable
_ou can enable or disa Hardware Profile Profile 1	able this service for the hardware profiles li Servic Enable Enable	sted below ce ed Disable

- 5. Click on the **Log On** tab.
- 6. Select the **This Account** radio button and then select **Browse**.
- 7. A dialog will appear that will allow you to browse for a user. Select the user you previously created for this process.
- 8. Once you have selected the user and clicked **OK**, you will return to the Log On screen. Select **Apply**.
- 9. You will be prompted that the user has been granted Login privileges, select OK.
- 10. Select **OK** to close the Properties dialog.
- 11. Right click on the Service and select Start.

Workpaper Location User Rights for Shared File Room

The Shared File Room is an alternate way of using Engagement, where users are allowed to directly access the Local File Room of another user. Using this method, one machine is designated as the "Host" of the Shared File Room, while all other users are designated as "Remote" users. The Host and Remote users are allowed to access the Host Local File Room, and can open binders and workpapers from this shared location.

The Engagement Shared File Room is completely dependent on Windows file sharing to function. Therefore, it is important that the Host user have proper rights to share folders on the Workstation. This requires at least Power User rights on the machine.

The Windows file share requires remote users to authenticate to the Host machine. Local user account will need to be added to the Host machine to allow the remote users to access the Shared File Room.

Please see the ProSystem *fx* Engagement Shared File Room Guide available for download from the ProSystem *fx* Engagement website for details on this feature.

Time Synchronization

Time synchronization is an integral part of ProSystem *fx* Engagement. Time synchronization is used to ensure that the latest changes in your binders are processed correctly during synchronization. Ensuring that servers and workstations running Engagement are synchronized for time will help ensure that you do not lose data and that the latest changes to the data and the server are kept.

To ensure time synchronization, ProSystem *fx* Engagement encourages you to utilize LAN based time synchronization software.

IMPORTANT: Time synchronization needs to take place on the network. Tools such as the "NET TIME" command allow you choose a computer on the network to synchronize your clock with. We DO NOT recommend having your users synch with time servers on the internet as each server could possibly be several seconds off.

Citrix/Terminal Services

Shared File Room

Due to file locking issues with Shared File Room, we do not support having two users log into the same WM profile, (using the same login ID), at the same time via Citrix or Terminal Services.

ISA (Internet Security and Acceleration) Server Connection Settings

Synchronization failures occurring on large binders may be caused by the number of connections the ISA server allows per client. It may be necessary to remove the per client connection limit in order to successfully synchronize these binders. In the Connection Limit dialog, the "Limit the number of connections" setting should be unchecked.

Microsoft Windows Vista, Windows 7, and Server 2008 Support

The Microsoft Windows Vista and Windows 7 Operating Systems are supported. Only Enterprise, Business, and Ultimate Editions are supported for use with ProSystem *fx* Engagement. These Operating Systems add new security features, including User Account Control (UAC) and BitLocker. Engagement will install and function with the UAC feature turned on. The installation process requires a system administrator, which is also required with all other operating systems currently supported by Engagement. BitLocker encryption is supported when used with Engagement.

Note: BitLocker is only available on Vista and Windows 7 Enterprise and Ultimate Editions and Server 2008.

Note: It is not recommended that ProSystem *fx* Engagement be installed to the x:\Program File directory due to the restricted rights access to that location imposed by Windows Vista. Windows Users with restricted rights may experience problems using Engagement if the application is installed to the Program Files directory.

Note: User Account Control (UAC) is also included with Windows Server 2008.

Note: Windows Server 2008 R2 is supported.

SQL Server 2005 Information

Creating a new SQL instance for ProSystem *fx* Engagement

This section provides step-by-step instructions for creating a new SQL 2005 instance for ProSystem *fx* Engagement.

Note: Before you start you will need to have your Microsoft SQL 2005 Server CD and Service Pack 2 or higher for SQL. Both items will be needed to perform the installation of Engagement.

Note: Please make sure that you follow each step carefully to ensure that the SQL instance is properly created with all required settings.

- 1) Insert SQL Server 2005 Installation Disk
- 2) Click "Server Components, tools, Books Online, and samples"



3) Select "I accept the licensing terms and conditions" and then Click **Next** on the Welcome to Microsoft SQL Server screen.

🐱 Microsoft SQL Server 2005 Setup	X
End User License Agreement	
MICROSOFT SOFTWARE LICENSE TERMS MICROSOFT SQL SERVER 2005 DEVELOPER EDITION These license terms are an agreement between Microsoft Corporation (or based on where you live, one of its affiliates) and you. Please read them. They apply to the software named above, which includes the media on which you received it, if any. The terms also apply to any Microsoft • updates, • supplements, • Internet-based services, and • support services V laccept the kenning terms and condition	
Cano	el

4) Click **Install** on the Installing Prerequisites screen to install the Native Client and Setup Support Files.



5) Click **Next** after the Prerequisites are installed.



6) Click **Next** on the Welcome to Microsoft SQL Server Installation Wizard.



7) Click **Next** on the Configuration Check Screen.



8) Fill out the Registration information on the Registration Information screen and Click Next.

😼 Microsoft SQL Server 2005 S	Setup 🗾
Registration Informatio The following information wi	n Il personalize your installation.
The Name field must be filled	d in prior to proceeding. The Company field is optional.
N <u>a</u> me:	
Company:	
I	
Please enter your 25 charac sticker in the CD liner notes	ter Product Key. You can find this number on the yellow or the CD sleeve.
Help	< Back Next > Cancel

9) Select "SQL Server Database Services" and "WorkStation Components" on the Components to Install Screen. Click **Next** to Continue.

Note: Workstation components are optional for Engagement. However, they can be used to assist support in certain circumstances.

😸 Microsoft SQL Server 2005 Setup
Components to Install Select the components to install or upgrade.
SQL Server Database Services
Create a SQL Server failover duster
Analysis Services
Create an Analysis Server failover duster
Reporting Services
Notification Services
Integration Services
☑ Workstation components, Books Online and development tools
For more options, click Advanced.
Help Cancel Cancel

10) Select "Named Instance" and type in "PROFXENGAGEMENT" on the Instance Name screen. Click **Next** to continue.

😸 Microsoft SQL Server 2005	Setup	×
Instance Name You can install a default ins instance.	stance or you can specify a named	
Provide a name for the instanc Next. To upgrade an existing o named instance select Named i	e. For a default installation, click Default instance and click default instance, click Default instance. To upgrade an existin instance and specify the instance name.	g
Default instance Named instance PROFXENGAGEMENT		
To view a list of existing in:	stances and components click on Installed instances.	
	Installed instances	
Help	< Back Next > Cancel	

11) Select "Use the built-in system account" on the Service Account screen. Click **Next** to continue.

Customize for each service account	
S <u>e</u> rvice:	.
Use the built-in System account	Local system 🔹
🔘 Use a domain use <u>r</u> account	
∐sername:	
<u>P</u> assword:	
Domain:	
Start services at the end of setup	
V SQL Server	
SQL Server Agent	

12) Select "Windows Authentication" on the Authentication Mode screen. Click **Next** to Continue.

😸 Microsoft SQL Server 2005 Setup	×
Authentication Mode The authentication mode specifies the security used when connecting to SQL Server.	
Select the authentication mode to use for this installation.	
<u>Windows Authentication Mode</u> <u>Mixed Mode</u> (Windows Authentication and SQL Server Authentication)	
Specify the sa logon password below:	
Enter password:	
Confirm <u>password</u> :	
Help < Back Next > Co	ancel

13) Leave the default settings on the Collation Screen and click **Next** to continue. If the default settings for your installation do not match those shown in the screen below, select the settings shown.

Collation Settings Collation settings define the sorting behavior for your server. Collation settings for service: SQL Server Collation gesignator and sort order: Latin1_General Binary Collations (used for compatibility with previous versions of SQL Server) SeqL collations (used for compatibility with previous versions of SQL Server) SeqL collations (used for compatibility with previous versions of SQL Server) SeqL collations (used for compatibility with previous versions of SQL Server) SeqL collations (used for compatibility with previous versions of SQL Server) Extra compatibility with version 1.x case-insensitive databases, for use with the Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictio	LAtiona aft SOL Samuer 2005 Setur	
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Case - sensitive Kana - sensitive Width - sensitive Width - sensitive SQL collations (used for compatibility with previous versions of SQL Server) Binary order based on code point comparison, for use with the 850 (Multilingual' Strict compatibility with version 1.x case-insensitive databases, for use with the Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, unnercase nreference for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insenserve, for use with 1252 Character Set. D	Binary	Binary - code point
Accent - sensitive	Case - sensitive	Kana - sensitive
SQL collations (used for compatibility with previous versions of SQL Server) Binary order based on code point comparison, for use with the 850 (Multilingual' Strict compatibility with version 1.x case-insensitive databases, for use with the Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, innercase preference for use with 1252 Character Set. Help	Accent - sensitive	Width - sensitive
Binary order based on code point comparison, for use with the 850 (Multilingual Strict compatibility with version 1.x case-insensitive databases, for use with the Dictionary order, case-sensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive unnercase preference for use with 1257 Ch	SQL collations (used for compatibility	ty with previous versions of SQL Server)
Strict compatibility with version 1.x case-insensitive databases, for use with the Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, unnercase preference for use with 1252 Ch	Binary order based on code point co	mparison, for use with the 850 (Multilingual)
Dictionary order, case-insensitive, for use with 1252 Character Set. Dictionary order, case-insensitive, unnercase preference, for use with 1252 Ch	Dictionary order, case-sensitive, for	case-insensitive databases, for use with the
Help < Bark Nevt > Cancel	Dictionary order, case-insensitive, f	or use with 1252 Character Set.
	Dictionary order_case-insensitive_□ III	nnercase preference for use with 1252 Ch
Help Carrel Next Carrel	1	
Help Cancel		
	Help	< Back Next > Cancel

14) Click Install on the Ready to Install screen.



15) Click Next on the Setup Process once it is finished.

The selected components are being co	nfigured	
Product	Status	
SOL VSS Writer	Setup finished	
OWC11	Setup finished	
SQL Server Backward-Compatibility F	les Setup finished	
SQL Server Database Services	Setup finished	
Visual Studio Integrated Developmen	t Setup finished	-
SQL Server Books Online	Setup finished	
SOLXML4	Setup finished	
Workstation Components, Books Onli	n Setup finished	

16) Click Finish on the Completing Microsoft SQL Server 2005 screen.



Note: Microsoft SQL Server 2005 SP2 is required for the installation. Please install SP2 if the version installed is below SP2. The following link will take you to the download and instructions directly from Microsoft.

http://www.microsoft.com/downloads/details.aspx?FamilyId=d07219b2-1e23-49c8-8f0c-63fa18f26d3a&displaylang=en

SQL Server 2008 Information

Creating a new SQL 2008 32 Bit or 64 Bit instance for ProSystem *fx* Engagement

This section provides step-by-step instructions for creating a new SQL 2008 32 Bit or 64 Bit instance for ProSystem fx Engagement. If you need to create a new instance for SQL 2008 Express 64 Bit, please see the next section named "Creating a new SQL 2008 Express 64 Bit instance for ProSystem fx Engagement".

Note: Microsoft does not support SQL Server 2008 on certain Windows versions:

SQL Server 2008 is not supported on:

- Any version of Windows XP less than Windows XP Service Pack 2
- Any version of Windows Server 2003 less than Windows Server 2003 SP2

SQL Server 2008 R2 is not supported on:

- Any version of Windows XP x86 less than Windows XP x86 Service Pack 3
- Any version of Windows XP x64 less than Windows XP x64 Service Pack 2
- Any version of Windows Server 2003 less than Windows Server 2003 Service Pack 2
- Any version of Windows Server 2008 less than Windows Server 2008 Service Pack 2
- Any version of Windows Vista less than Windows Vista Service Pack 2

Please see Microsoft KB 2022909 for detailed information.

http://support.microsoft.com/kb/2022909

Note: Please make sure that you follow each step carefully to ensure that the SQL instance is properly created with all required settings.

- 1) Insert SQL Server 2008 Installation Disk
- 2) Click "Installation"



3) Select "New SQL Server stand-alone installation or add features to an existing installation"



4) The Setup Support Rules screen will appear. Select **OK** to proceed with the installation.

SQL Server 2008 Setup		
Setup Support Rules		
Setup Support Rules identify before Setup can continue.	roblems that might occur when you install SQL Server Setup support files. Failures must be co	rrected
Setup Support Rules	Operation completed. Passed: 6. Failed 0. Warning 0. Skipped 0.	
	Show details >> View detailed report	Re-run
	ОК	Cancel Help

5) The Product Key screen will appear. Enter the SQL Server product key and Select Next.

Product Key License Tems Setup Support Files	🚼 SQL Server 2008 Setup	
Specify the edition of SQL Server 2008 to install. Product Kcy License Tems Setup Support Files Specify a free edition of SQL Server or provide a SQL Server product key to validate this instance of SQL Server approximation, manual control of the second secon	Product Key	
Product Key Specify a free edition of SQL Server or provide a SQL Server product key to validate this instance of SQL Server 2008. Enter the 25-character key from the Microsoft cettificate of authenticity or product packaging. If you specify Enterprise Evaluation, the instance will be activated will be acti	Specify the edition of SQL Server 20	08 to install.
	Product Key License Terms Setup Support Files	Specify a free edition of SQL Server or provide a SQL Server product key to validate this instance of SQL Server 2008. Enter the 25-charater key from the Microsoft cettificate of authenticity or product packaging. If you specify Interprese Evaluation, the instance will be activated with a 180-day expiration. To upgrade from one edition to another edition: C Specify a free edition: Enterprese Evaluation C Enter the product key:
< Back Next > Cancel		< Back Next > Cancel

6) Click "I accept the license terms" and select Next.



7) Click Install on the Setup Support files screen.

SQL Server 2008 Setup			_0
Setup Support Files			
Click Install to install Setup	Support files. To install or update SQL S	erver 2008, these files are required.	
	The following and the		
Product Key License Terms	The following components a	e required for SQL Server Setup.	
Setun Sunnort Files	Feature Name	Status	
secup support nes	Setup Support Files		
		< Back Instal	Cancel

8) Click Next on the Setup Support Rules Screen.

🍀 SQL Server 2008 Setup			
Setup Support Rules			
Setup Support Rules identify proble before Setup can continue.	ms that	might occur when you install SQL Server Setup support files. Failures	must be corrected
Setup Support Rules	Ope	ration completed. Passed: 10. Failed 0. Warning 1. Skipped 0.	
Feature Selection			
Disk Space Requirements	1.0.4	- deserve	2
Error and Usage Reporting	HIG	e details <<	Re-run
Installation Rules	View	detailed report	
Ready to Install Installation Progress		Rule	Status
Complete		Fusion Active Template Library (ATL)	Passed
		Unsupported SQL Server products	Passed
		Performance counter registry hive consistency	Passed
		Previous releases of SQL Server 2008 Business Intelligence Develop	Passed
		Previous CTP installation	Passed
		Consistency validation for SQL Server registry keys	Passed
		Computer domain controller	Passed
		Microsoft .NET Application Security	Passed
		Edition WOW64 platform	Passed
		Windows PowerShell	Passed
		Windows Firewall	Warning
		·	
		< Back Nex	t > Cancel Help
			///

9) Select "Database Engine Services" and "Management Tools" on the Feature Selection Screen. Click **Next** to Continue.

Note: Management Tools are optional for Engagement. However, they can be used to assist support in certain circumstances.

SQL Server 2008 Setup	
Feature Selection Select the Standard features to i clustered.	stall. For clustered installations, only Database Engine Services and Analysis Services can be
Setup Support Rules Feature Selection Instance Configuration Database Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Features: Description: Interact Features Server features are instance-aware and have for our egginy thes. They apport our egginy thes. They apport our egginy thes. They apport multiple instances on a computer. Image: I
	Select All Unselect All Shared feature directory: [C:\Program Files\Wicrosoft SQL Server\
	< Back Next > Cancel Help

10) Select "Named Instance" and type in "PROFXENGAGEMENT" on the Instance Configuration screen. Click **Next** to continue.

🎲 SQL Server 2008 Setup						_ []
Instance Configuratio	n D for the SQL Server instance					
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	C Default instance C Named instance: Instance ID: Instance cont director	PROFXENGAGEMEN	T T Trasoft SOIL Server)			
	SQL Server directory: Installed instances:	C:\Program Files\M	licrosoft SQL Server\\	155QL10.PROFXENO	SAGEMENT	
			< Back	Next >	Cancel	Help

11) The Disk Space Requirements screen will appear. Click **Next** to continue.

🚼 SQL Server 2008 Setup		
Disk Space Requireme	ents forthe SQL Server features you selected.	
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Tearbilition Unit	Disk Usage Summary: System Drive C: 1147 MB required, 20321 MB available System Drive (C:): 551 MB required Shared Instal Directory (C:)Program Files/Microsoft SQL Server(): 409 MB required Instance Directory (C:)Program Files/Microsoft SQL Server(): 177 MB required	
Instalation Aues Ready to Install Installation Progress Complete		
	< Back Next > Cancel +	Help

12) On the Service Accounts tab of the server Configuration Screen, Select "Use the same account for all SQL Server services" on the Authentication Mode screen. Change the Account Name to NT AUTHORITY\SYSTEM for the SQL Server Database Engine. Verify the Startup Type is set to "Automatic". Click **Next** to Continue.

SQL Server 2008 Setup				
Server Configuration				
etup Support Rules ieature Selection nstance Configuration	Service Accounts Collation	ise a separate account for each S	QL Server servic	ie.
Enver Configuration	SOL Server Agent	Account Name	Password	Manual Manual
Database Engine Configuration	SQL Server Database Engine	NT AUTHORITY\SYSTEM		Automatic
Ready to Install		Use the sa	ame account for	all SQL Server servi
keady to Install nstallation Progress Complete	These services will be configured older Windows versions the user Help.	automatically where possible to will need to specify a low privileg	ame account for use a low privile ge account. For r	all SQL Server servi
keady to Install nstallation Progress Complete	These services will be configured older Windows versions the user Help. Service SQL Servic Browser	automatically where possible to will need to specify a low privileg Account Name NT AUTHORITY'LOCAL S	use a low privile e account. For r	all SQL Server servi ge account. On son more information, cl Startup Type Automatic
keady to Install nstallation Progress Jomplete	These services will be configured older Windows versions the user Help. Service SQL Server Browser	Use the si automatically where possible to will need to specify a low privileg Account Name NT AUTHORITY LOCAL S	we account for use a low privile ge account. For r Password	ige account. On son more information, cl Startup Type Automatic

13) Leave the default settings on the Collation tab and click **Next** to continue. If the default settings for your installation do not match those shown in the screen below, select the settings shown.

SQL Server 2008 Setup		
Server Configuration Specify the configuration.		
Setup Support Rules Feature Selection Instance Configuration Dak Space Requirements Server Configuration Database Engine Configuration Forra and Lage Reporting Installation Rules Ready to Install Installation Progress Complete	Service Accounts Collation Database Engine: [2QL_Lath1_General_CP1_CL_AS Latin1-General, case-insensitive, accent-sensitive, kanatype-insensitive, width-insensitive for Unicode Data, SQL Server Sort Order 52 on Code Page 1252 for non-Unicode Data Analysis Services: _atin1_General_CL_AS Latin1-General, case-insensitive, accent-sensitive, kanatype-insensitive, width-insensitive Latin1-General, case-insensitive, accent-sensitive, kanatype-insensitive, width-insensitive	Customize
	< Back Next > Cancel	Help

14) Select "Windows authentication mode" on the Database Engine Configuration screen. Add an Administrator user account in the Specify SQL Server administrators field. Click **Next** to Continue.

SQL Server 2008 Secup	
Database Engine Config Specify Database Engine authentica	uration tion security mode, administrators and data directories.
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Account Provisioning Data Directories FILESTREAM Specify the authentication mode and administrators for the Database Engine. Authentication Mode © Windows authentication mode © Mixed Mode (SQL Server authentication and Windows authentication) Built-in SQL Server system administrator account Enter password: Confirm password: Specify SQL Server administrators Administrator (Administrators) SQL Server administrators Administrator (Administrator) SQL Server administrators Add Current User Add Remove

15) The Error and Usage Reporting screen will appear. Click Next to Continue.



16) The Installation Rules screen will appear. Click Next to Continue.



17) Select the "Show Details" button to see a detailed report of the Installation Rules. Click **Next** to Continue.

🚼 SQL Server 2008 Setup		
Installation Rules Setup is running rules to determi	e if the installation process will be blocked. For more information, click Help	
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration	Operation completed, Passed: 9. Failed 0. Warning 0. Skipped 2. Hide details << <u>View detailsd report</u>	Re-run
Database Engine Configuration	Bule	Status
Error and Usage Reporting Installation Rules	Same architecture installation	Passed
Ready to Install	Cross language installation	Passed
Installation Progress	Existing dustered or duster-prepared instance	Passed
Complete	Reporting Services Catalog Database File Existence	Not applicable
	Reporting Services Catalog Temporary Database File Existence	Not applicable
	SQL Server 2005 Express tools	Passed
	Operating system supported for edition	Passed
	FAT32 File System	Passed
	SQL Server 2000 Analysis Services (64-bit) install action	Passed
	Instance name	Passed
	Previous releases of Microsoft Visual Studio 2008	Passed
	< Back	Next > Cancel Help

18) The Ready to Install screen will appear. Verify the SQL Server 2008 features to install. Click **Install** to continue.

SQL Server 2008 Setup Ready to Install Verify the SQL Server 2008 feature	res to be installed.
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Empire Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Ready to Install SQL Server 2008:
	< Back Install Cancel Help

19)The Installation Progress will appear. Click **Next** to Continue. Please be patient, the install process can take a long time to complete.

🍀 SQL Server 2008 Setup	
Installation Progress	
Installation Progress Setup Support Rules Feature Selection Instance Configuration Database Engine Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Instal Installation Progress Complete	Producing intermediate status logs.
	ivex. > Cancer help

20)The Installation Progress screen will provide a notification when the setup process has completed. Click **Next** to Continue.

SQL Server 2008 Setup			
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration	Setu	ip process complete	
Database Engine Configuration		Feature Name	Status
Error and Usage Reporting		Database Engine Services	Success
Installation Rules		Management Tools - Complete	Success
Ready to Install		Management Tools - Basic	Success
Installation Progress Complete			
			Next > Cancel Help

21) The Complete screen will appear. Click Close to finish the installation.



Creating a new SQL 2008 Express 64 Bit instance for ProSystem *fx* Engagement

Though SQL 2008 Express 64 Bit is supported, there currently is no installer available to create the ProSystem *fx* Engagement SQL instance. This section provides step-by-step instructions for creating a new SQL 2008 Express 64 Bit instance for ProSystem *fx* Engagement.

Note: The screenshots provided below show the Microsoft SQL Server 2008 R2 Express Edition installation process. The steps are the same for Microsoft SQL Server 2008 Express Edition.

Note: Please make sure that you follow each step carefully to ensure that the SQL instance is properly created with all required settings.

- 1) Download the install package from the Microsoft website and launch it
- 2) Click "New Installation or add features to an existing installation"



3) Select "I accept the license terms" and click Next



4) The Setup Support Files screen will appear. Select **Install** to proceed with the installation.

SQL Server 2008 R2 Setup			
Setup Support Files Click Install to install Setup Supp	ort files. To install or update SQL !	Server 2008 R2, these files are requir	ed.
License Terms	The following components a	re required for SQL Server Setup:	
Setup Support Files	Feature Name	Status	
	Setup Support Files		
	ExecuteCalculateScenarioWo	rkflow	
	ExecuteCarculateScellanowo	TKITOW	
			< Back Install Cancel

5) The Feature Selection will appear. Click the Unselect All button.



6) Choose Database Engine Services under Instance Features and Management Tools – Basic under Shared Features. Select **Next**.

Note: Management Tools are optional for Engagement. However, they can be used to assist support in certain circumstances.

🚼 SQL Server 2008 R2 Setup		
Feature Selection	3 Services features to install.	
Setup Support Rules Feature Selection Instalation Rules Instance Configuration Disk Space Requirements Server Configuration Database Ergine Configuration Error Reporting Installation Configuration Rules Installation Progress Complete	Features:	Description: Server features are instance- aware and have their own regarty hybes. They support multiple instances on a computer.
	Select All Unselect All Shared feature directory: C:\Program Files\Microsoft SQL Server\ Shared feature directory (x86); C:\Program Files (x86)\Microsoft SQL Server\	er\
	< Back Ne	ext > Cancel Help

7) Select "Named Instance" and type in "PROFXENGAGEMENT" on the Instance Configuration screen. Click **Next** to continue.

🚼 SQL Server 2008 R2 Setup					_0×
Instance Configuration Specify the name and instance ID for	or the instance of SQL Serv	er. Instance ID becom	es part of the installat	tion path.	
Setup Support Rules Feature Selection Installation Rules Installation Rules Disk Space Requirements Server Configuration Database Engine Configuration Error Reporting Installation Configuration Rules Installation Progress	C Default instance C Named instance: Instance ID: Instance root directory SQL Server directory: Installed instances:	PROFXENGAGEMENT PROFXENGAGEMENT : C:\Program Files\Micr C:\Program Files\Micr	osoft SQL Server\ crosoft SQL Server\MS	55QL10_50.PROFXENG	AGEMENT
Complete	Instance Name	Instance ID	Features	Edition	Version
			< Back	Next > Ca	ncel Help

8) On the Service Accounts tab of the Server Configuration Screen, Select "Use the same account for all SQL Server services" on the Authentication Mode screen. Change the Account Name to NT AUTHORITY\SYSTEM for the SQL Server Database Engine. Verify the Startup Type is set to "Automatic" for SQL Server Database Engine and for SQL Server Browser. Click Next to Continue.

🎲 SQL Server 2008 R2 Setup					_ 🗆 >
Server Configuration	collatio	on configuration.			
Setup Support Rules Feature Selection Installation Rules Instance Configuration		Service Accounts Collation Microsoft recommends that you of Service	ise a separate account for each Si Account Name	QL Server servio	startup Type
Server Configuration Database Engine Configuration Error Reporting Installation Configuration Rules Installation Progress Complete		SQL Server Browser	NT AUTHORITYLOCAL S	me account for	Automatic
			< Back	Next >	Cancel Help

9) Select "Windows authentication mode" on the Database Engine Configuration screen. Add an Administrator user account in the Specify SQL Server administrators field. Click **Next** to Continue.

Database Engine Config	uration
Specify Database Engine authentica	tion security mode, administrators and data directories.
etup Support Rules eature Selection nstallation Rules Instance Configuration kisk Space Requirements ierver Configuration Jatabase Engine Configuration irror Reporting Installation Configuration Rules Installation Progress Iomplete	Accourt Provisioning Data Directories FILESTREAM Specify the authentication mode and administrators for the Database Engine. Authentication Mode • • Windows authentication mode • • Mixed Mode (SQL Server authentication and Windows authentication) Specify the password for the SQL Server system administrator (sa) account: Enter password: • Confirm password: • Specify SQL Server administrators SQL Server administrators SVR20088/BPD/Administrator (administrator) SQL Server administrators Add Current User Add Remove

10) The Error Reporting screen will appear. Click Next to Continue.

🏶 SQL Server 2008 R2 Setup	
Error Reporting	
Help Microsoft improve SQL Ser	verfeatures and services.
Setup Support Rules Feature Selection Installation Rules Instance Configuration Disk Space Requirements Server Configuration Configuration Error Reporting Installation Configuration Rules Installation Progress Complete	Specify the information that you would like to automatically send to Microsoft to improve future releases of SQL. Server. These settings are optional. Microsoft treats this information as confidential. Microsoft may provide update through futures of Update to modify feature usage data. These undates might be downloaded and installed on your machine automatically, depending on your Automatic Update settings. See the Microsoft SQL. Server 2008 B2 Privacy Statement for more information. Read more about Microsoft Update and Automatic Update. Image: Server 2008 B2 Privacy Statement for your corporate report server. This setting only applies to services that run without user interaction.
	< Back Next > Cancel Help

11)The Installation Progress will appear. Click **Next** to Continue. Please be patient, the install process can take a long time to complete.

🚼 SQL Server 2008 R2 Setup	<u>X</u>
Installation Progress	
Setup Support Rules	
Feature Selection	
Installation Rules	Install_sql_engine_core_inst_loc_Cpu64_1033_Action : InstallFiles.Copying newfiles
Diele Sease Regulation	
Server Configuration	
Database Engine Configuration	
Error Reporting	
Installation Configuration Rules	
Installation Progress	
Complete	
	Next > Cancel Help

12) The Complete screen will appear. Click **Close** to finish the installation.



ProSystem fx Engagement Database Backup & Restore Utility

For instructions on using the ProSystem *fx* Engagement Database Backup & Restore Utility, refer to the Database Backup & Restore Instructions located on the Engagement CD or on the Support website.

3rd Party Backup and Restore Processes

If you are currently using a third party backup software to backup the Engagement databases, you will not be able to restore a single binder to the central file room. The ProSystem *fx* Engagement Database Backup and Restore utility allows the restoration of a single binder or an entire central file room. For additional information, refer to the ProSystem *fx* Engagement Database Backup and Restore Instructions.

If you choose to use a 3rd party backup and restore process, there may be some additional requirements that need to be considered. Refer to the 'Frequently Asked Questions' section on the Support website or call Technical Support at 800-739-9998 option 4.

Name Resolution

Connecting to Engagement

ProSystem *fx* Engagement uses SQL as the database engine SQL connects from the desktops to the server using the TCP/IP protocol. Engagement is utilizing SQL browsing to enable the client to see the server or to enable one server to see another. When you first launch ProSystem *fx* Engagement Workpaper Management you are asked to select an office server to connect to. A list of servers is made available to you to choose from. However in some cases, depending on the network type and setup you may not see the server that you are looking for. This can also happen when you are trying to connect to another Workpaper Management install when in field mode.

The primary cause of this is due to the network not being able to resolve the NetBIOS name of the workstations and servers across networks. These networks include Virtual LANs, Subnets or WANs.

The four methods listed below may be used to alleviate this issue

- Setting up a DNS server (preferred)
- Creating and using HOSTS and LMHOSTS files
- Setting up a WINS server
- Using the Pfx Configuration Utility

For further details on the methods listed above, obtain the Microsoft documentation necessary, or contact your System Administrator for assistance.

Pfx Configuration Utility

The PFX Configuration Utility provides the capabilities to replace the Adobe Plug-in, Excel add-ins, reregister dll's, start the PDF Printer Service, and configure network connections. The utility is located at "x:\Pfx Engagement\Common\PfxConfigUtil.exe". However, the utility should be run from the shortcut under "**Program Files\ProSystem Fx Engagement\Utilities\ProSystem fx Engagement Configuration Utility**". If the utility is run directly from the executable location, it may not run with the correct privileges.

Note: When running the ProSystem *fx* Engagement Configuration Utility in a Windows Vista environment with User Account Control (UAC) enabled, the Interactive Services Detection service must be running. The recommended best practice is to configure the Interactive Services Detection service to start automatically.

Adobe Plugins

The Adobe Plugins screen detects what version of adobe is installed and if the Engagement Plug-in is present. In some cases when Adobe is upgraded to a different version, it may be necessary to run this utility to ensure the plug-in is correctly installed for the new Adobe version. The advanced button allows the user to select applications that do not print correctly when postscript simulation is used.

Pfx Configu	ration Uti	lity		
Adobe Plugins	Epace XLA	Register	COM PDF Print S	ervice Networking
This table Select a p click the I	lists the Adol roduct that yo nstall button.	be products bu wish to in	installed on this ma stall the Engageme	chine and their versions. nt Tickmark plugin for and
Adobe F	roduct	Version	Plugin Installed	Location
Acro	bat	8.0	Yes	C:\Program Files\Adobe\Acrc
🗌 Rea	der	8.0	Yes	C:\Program Files\Adobe\Rea
<				>
Select	all		(Advanced Install
Install <u>A</u> ll				Close <u>H</u> elp

Epace XLA

The epace.xla is an Excel add-in file that allows users to access and use Engagement functions from within Excel documents. This tab is similar to the Adobe Plug-ins tab and will detect the version of Excel and its location. It will also check for missing epace.xla files. In some case it may be necessary to replace the existing file or move it to a new location after an upgrade of Microsoft Office versions.

Pfx Configuration	Jtility
Adobe Plugins Epace?	LA Register COM PDF Print Service Networking
To copy a new e Install button.	pace xla file to the Microsoft Excel startup location, click on the
Source location:	D:\Pfx Engagement\\//M\Utilities\epace.xla
Target path:	C:\Program Files\Microsoft Office\Office12\Library
Installed:	Yes
	Install
Install <u>A</u> ll	Close <u>H</u> elp

Register DIIs

This tab allows for several dlls to be registered.



PDF Print Service

This tab allows the user to either start or restart the PDF Print Service. It will also detect the current status of the Print Service.



Networking

This tab has many of the same features as the Netconfig utility had in prior versions of PFX Engagement. This tab helps to resolve connection issues to a workstation or server by adding an entry to the Hosts file and editing the registry.

The registry entries added tell SQL the following: the name of the SQL Instance you want to connect to, the IP address of the workstation or Server associated with the instance's name, and the TCP/IP port in which to communicate over.

Three options are available on this tab. The first option is the Configure option which the IP address and name of the machine is manually entered. The second option is the Auto-Detect option, with this option the system will auto-detect any other machines with the same dialog open. The third option on the Networking tab will remove all old entries from when the utility was previously used.

Pfx Configuration Utility	
Adobe Plugins Epace XLA Register COM PDF Print Servic	e Networking
Manual Settings	
Manually configure network settings:	Configure
Auto Detect	
Detect other machines running Pfx Configuration Utility:	Detect
Delete Settings	
Engagement SQL Instance aliases	
Last connected Engagement SQL cache	
✓ Host file changes	Delete
Install <u>A</u> ll	Close <u>H</u> elp

Configure (Manual)

Enter the target server or workstation in the machine name field. At this point tabbing down or clicking Test Connection may auto-populate the IP Address for you. If it does verify the IP Address is correct and then click Configure. If it does not auto-populate or an incorrect IP Address is showing, then it is necessary to manually enter the correct IP Address and click Configure.

The port number should not be changed unless the target server has been configured to run SQL on a different port. Consult your System Administrator or Database Administrator before changing this number.

Manual Network Configuration
Enter the Name and IP address of the machine that you wish to connect to.
Machine name: *
JP address: *
Port number: * 2029 Change default port
* Required fields
Test Connection Configure

Detect (Automatic)

Use the Detect Button to allow the utility to detect other Engagement users to connect to. To use the automatic feature the target computer should have the same dialog open.

🖗 Auto Detect		
Machine Name	User Name	IP Address
Port number: *	2029 🔲 C	hange <u>d</u> efault port
	Save	Close

Selecting the Save Button saves an SQL Alias for the connection to another user machine and adds an entry in the host file

Delete

This option deletes all the older entries from when this utility was previously used. It may be necessary to clean out old entries to avoid duplicates.

Install All

On each of the tabs a button an "Install All" button can be used to perform the actions of every tab. Clicking this button will replace the adobe API file, the Epace.xla, register all of the dll's, and restart/start the PDF Print Service.

Note: Install all does not affect the Networking Tab.

If you need more information or further assistance with any of the items above, please contact Technical Support at (800) 739-9998 option 4.