

Premium Pro Enterprise Network Installation Guide for Database Installation on a Network Server (Cloudscape)

This guide is to be used if you intend on using IBM Cloudscape 10.1 (Also known as Apache Derby) for the Enterprise database. A database administrator or similarly qualified person might be needed to perform the database installation. Cloudscape is a free alternative to using SQL Server for the Premium Pro Enterprise database. It is easier to install and configure than SQL Server.

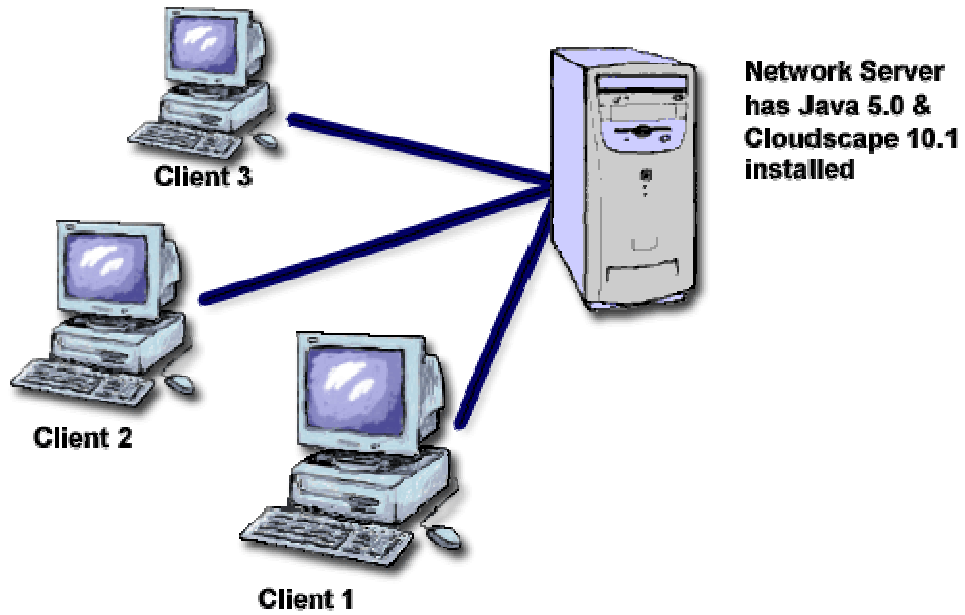
Please note in order to for the Cloudscape database to run, a user must login to the server where it is installed and start the Cloudscape application. Please note that PPE also supports the use of SQL Server Express (another database available free of charge). SQL Server Express does not have this limitation. See the SQL Server Installation guide for more information on SQL Server Express.

A Premium Pro Enterprise (PPE) network installation consists of several parts

- Company and User Registration
- Database Installation (Cloudscape)
- Premium Pro Enterprise Installation (Fileserver)
- Establishing Appropriate User Rights
- Workstation Installation (desktop PC)

PPE is a fat client. This means all the data processing operations are performed on or by the client (user's pc) rather than the server. Minimum system requirements apply to the desktop PC. Specific firewall/proxy server changes made for PPE are to be made to accommodate the desktop PC, not the fileserver.

In the **Network Server** configuration of PPE, you can have several clients working on returns at the same time. But all the data for the returns will be saved on one machine, housing the Cloudscape database.



Chapter 1: Company and User Registration

Before using *Premium Pro Enterprise*, each company must register with TriTech Software. You may register at <https://ppo.tritechsoft.com/p2eereg/>.



Click on the button **Sign Up Now**. You must complete a Company Registration form for the parent company and set up the primary Administrative user. Once the initial registration page is completed, click on the submit button. The administrative user will have rights to add, edit, and remove companies (as well as users).

Once the initial registration has been completed, the administrative user can login into the website and add additional companies. Click on the link for the parent company and a list of all Sub Companies will be displayed.

You may edit the parent company by clicking on the link for the parent company. You will see checkboxes at the bottom of Company Setup form for each product you have purchased: Premium Tax, Municipal, and/or FormPlus. You must select the check box in order to allow access to that product.

You may add subsequent companies by clicking on the **New Company** link. Complete the form as you did for the parent company. Ensure that you select the product checkboxes at the bottom. Otherwise the new company created will not be available to the end user.

To add a new user, select New User and complete the appropriate form. Upon completion, an email will be sent to each user containing a unique username and password that will be used to access the software.

Chapter 2: Installing the Database

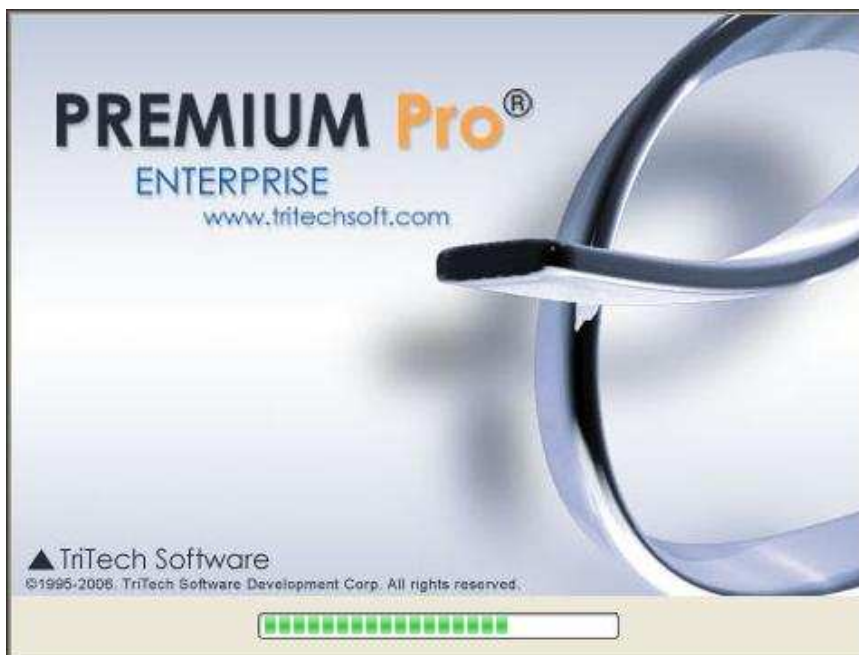
Cloudscape 10.1 is a third party freeware program provided by IBM. It is designed to house a database and allow multiple users to access that database. (It is also known as Apache Derby.)

Once Java and Cloudscape are installed, the Premium Pro Enterprise[®] database may then be installed on the network server.

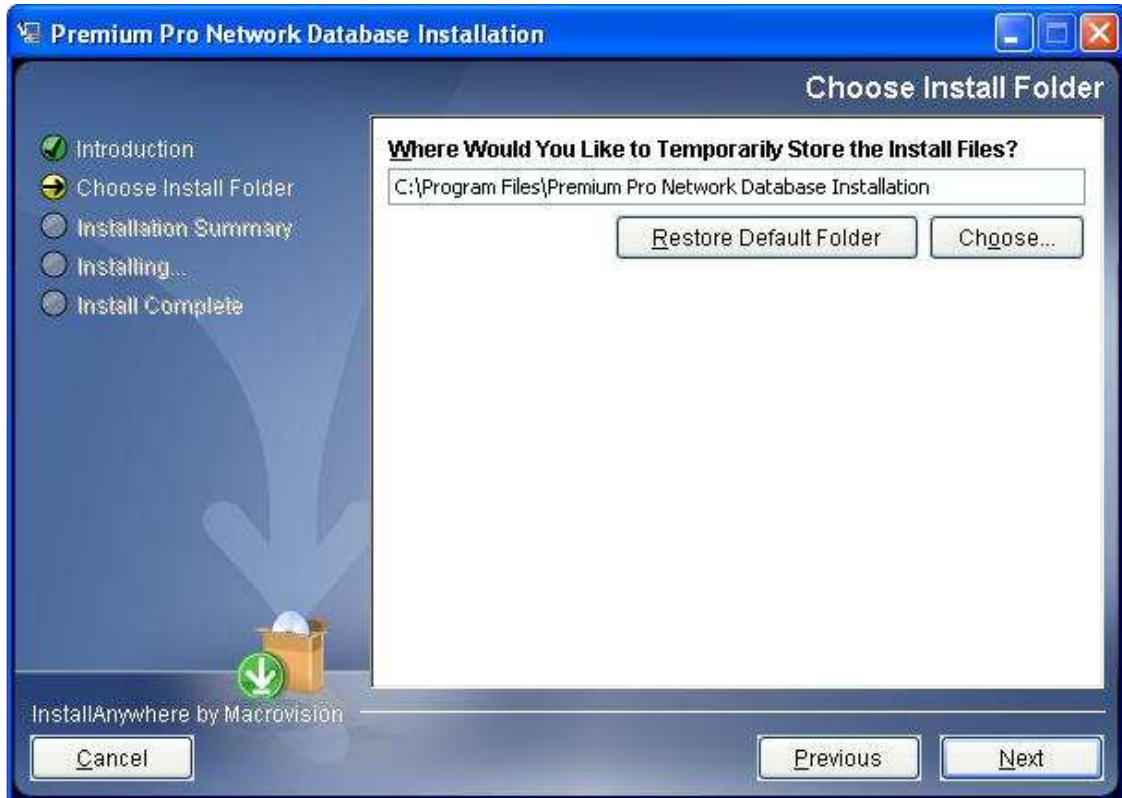
The **Network Server Installation** MUST be performed on the server itself. You must install directly to the server or you must remote into the server using Remote Desktop or some other means.

The installation provided by TriTech will install both Cloudscape 10.1 and the tables necessary to run Premium Pro Enterprise (PPE).

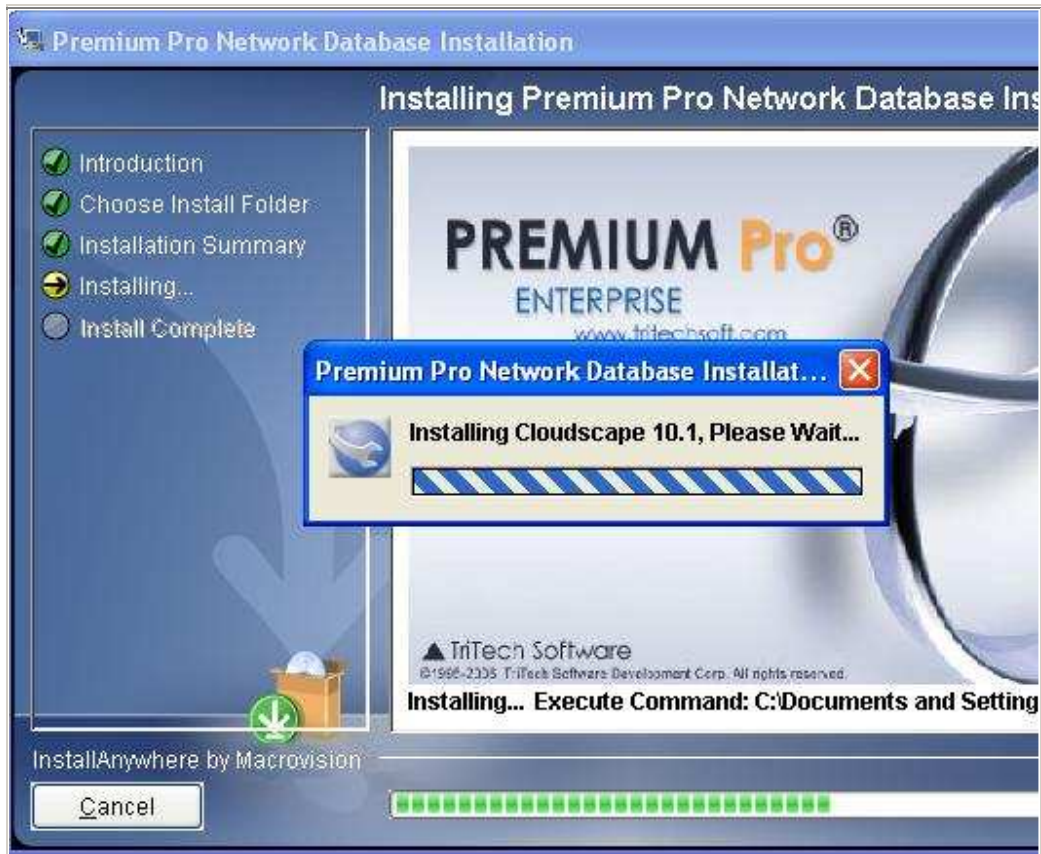
1. Download the latest Java Runtime environment from here:
<http://www.java.com/en/download/index.jsp>
2. Install java runtime.
3. Download the EnterpriseDerbyInstall.exe from here:
<http://enterprise.tritechsoft.com/installs/> Click on the hyperlink for EnterpriseDerbyInstall.exe.
4. Click run to download the file and install it. Otherwise, click **Save** and you may installed the program at a later time. The installation program will start up.



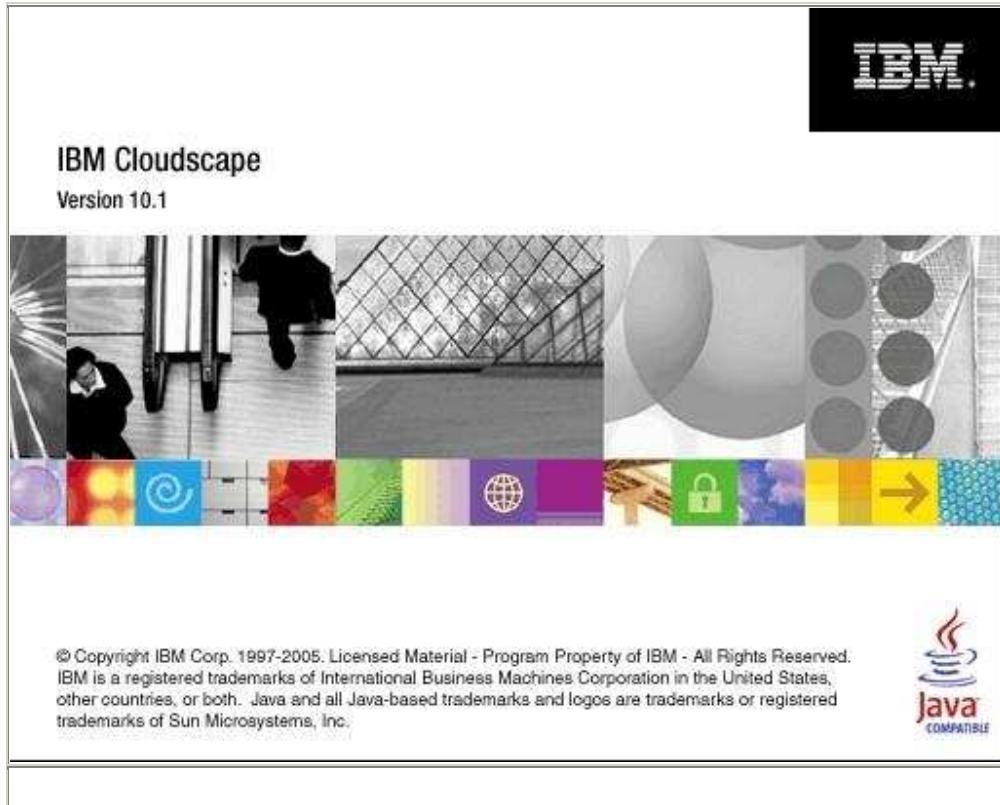
5. Click on **Next** to begin the installation. Select the directory where the installation files will temporarily be stored. Then click **Next**.



6. Review the installation summary, then click **Install**. IBM's Cloudscape 10.1 will install. This may take a few minutes to load.



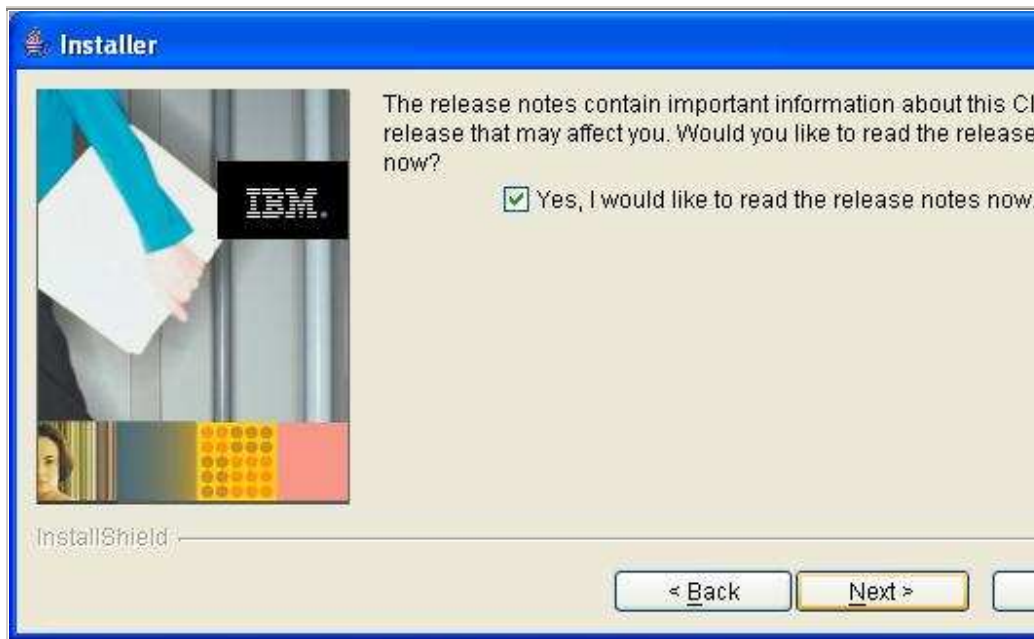
7. The Cloudscape 10.1 installation splash screen will appear in a few moments.



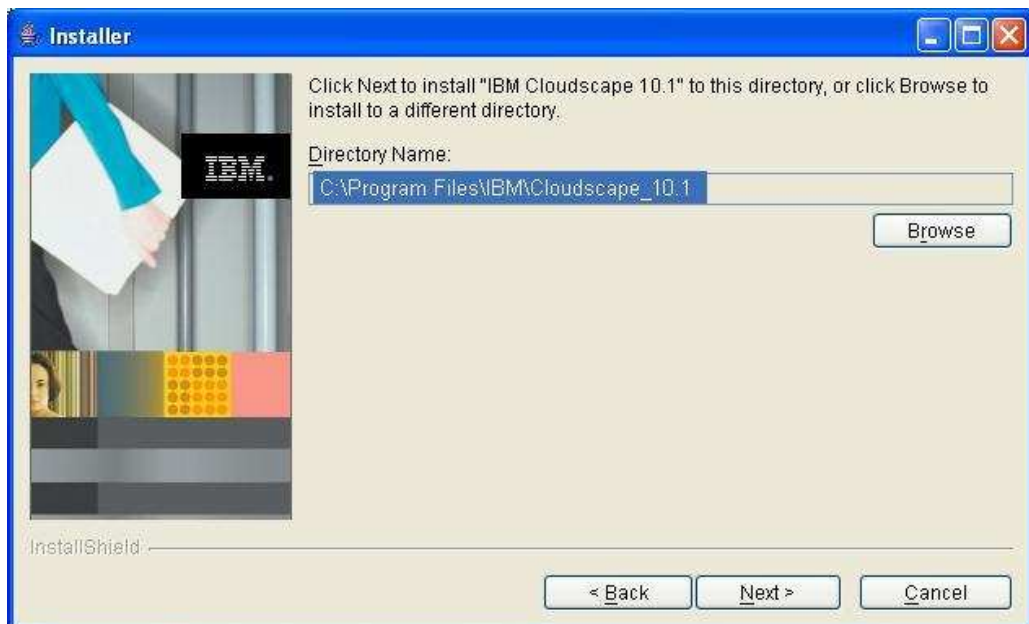
8. Click **Next** to begin the installation process.



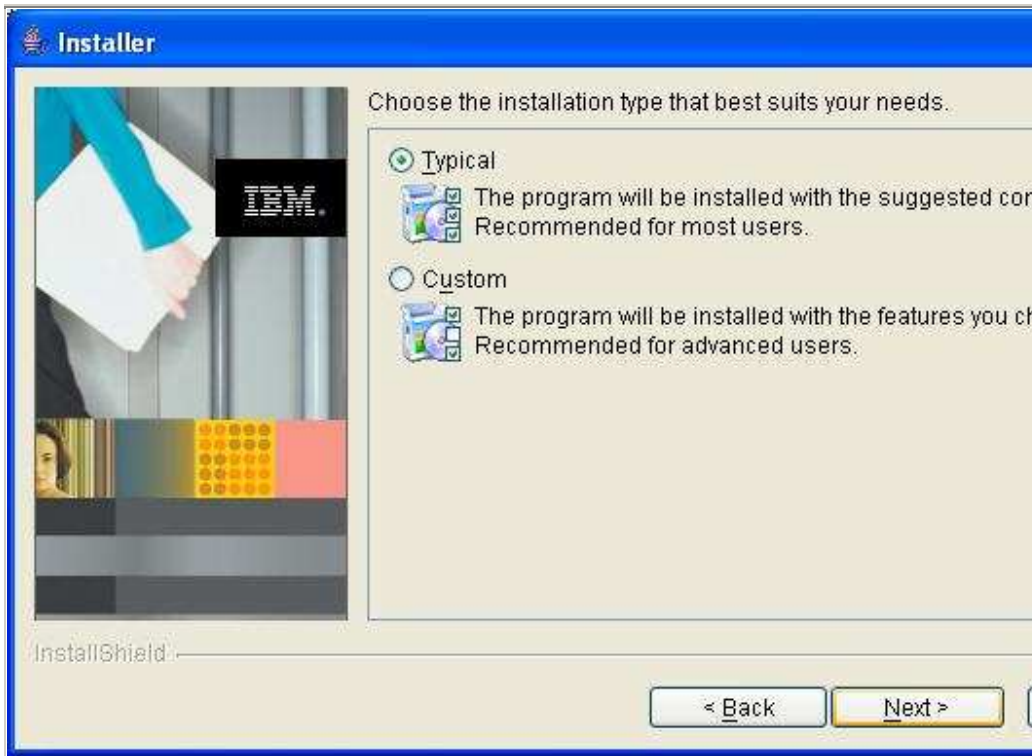
9. Specify if you would like to read the release notes and then click **Next**.



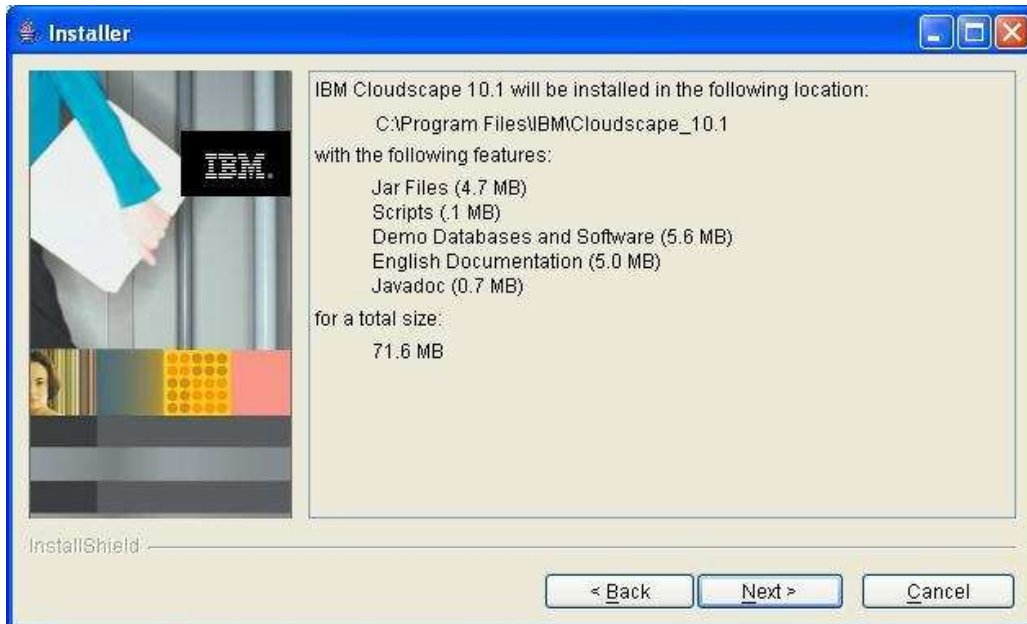
10. Click **Next** at the Release Notes screen. Accept the license agreement. Click **Next**. Click **Next** to install IBM Cloudscape to the specified directory. Make note of the directory you chose to install Cloudscape 10.1 as you will need this information later on.



11. Select the "Typical" installation. Click **Next**.



12. Verify the information listed and click **Next** to install IBM Cloudscape.

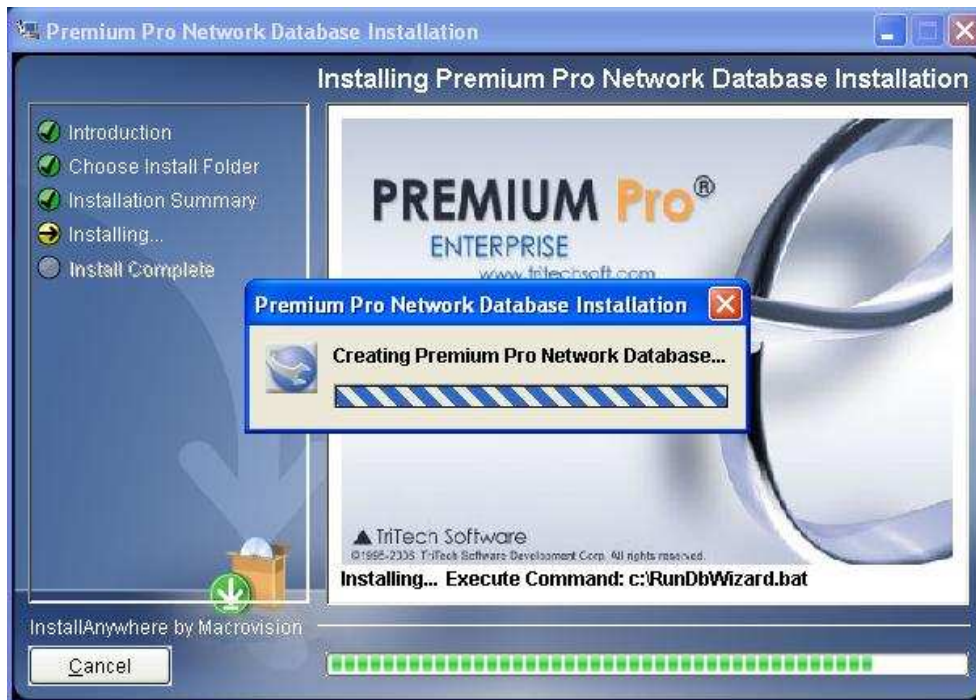


13. Click **Next** to continue. Click **Finish**.

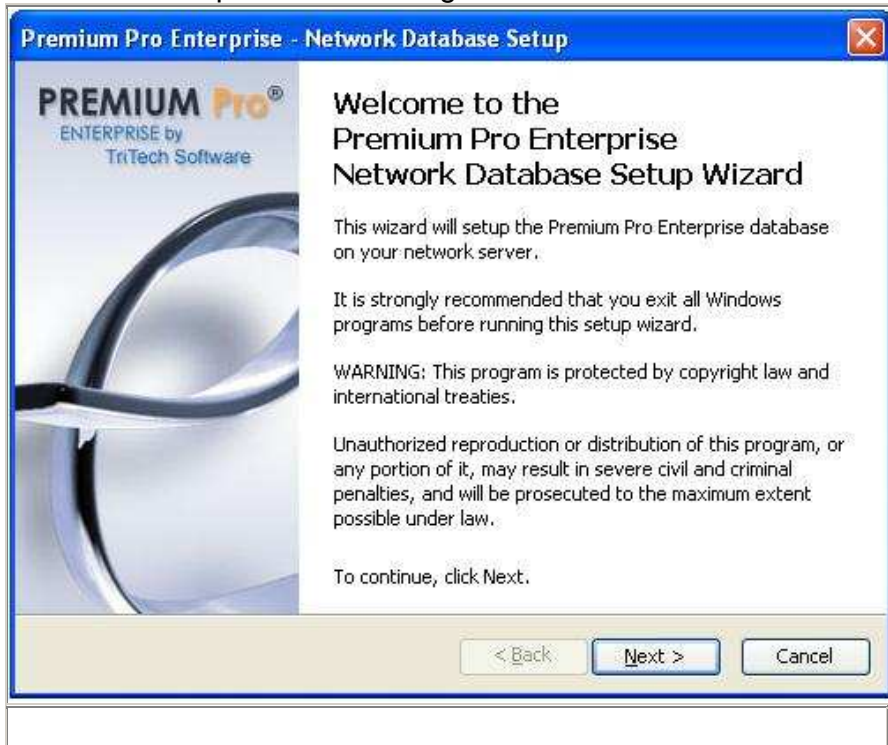


14. Cloudscape 10.1 is now installed on the server.

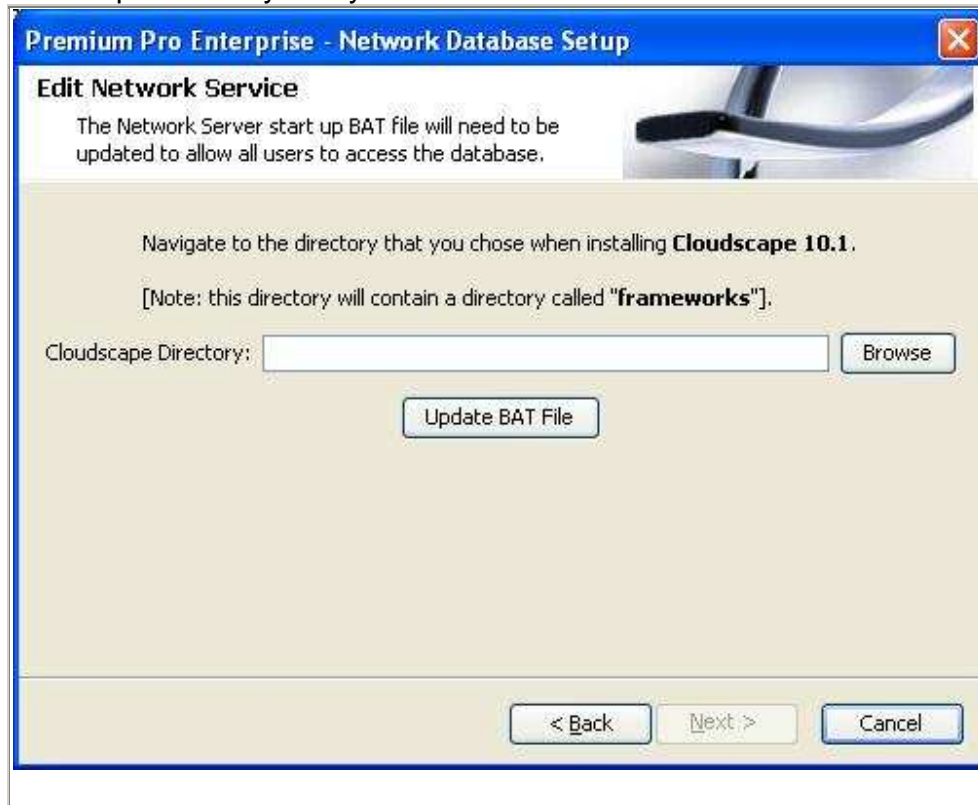
15. The Premium Pro Enterprise[®] Network Database will install next.

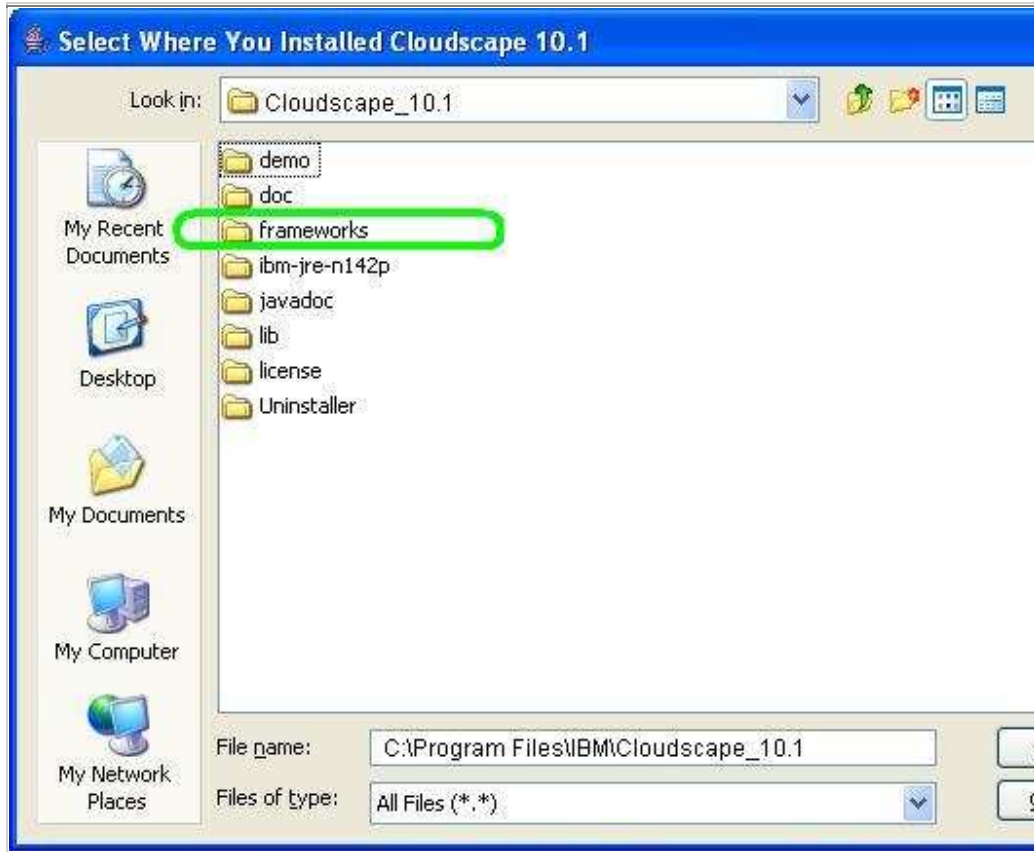


16. The Network Database Wizard will guide you through this installation. Click **Next**. Accept the License Agreement and click **Next**.

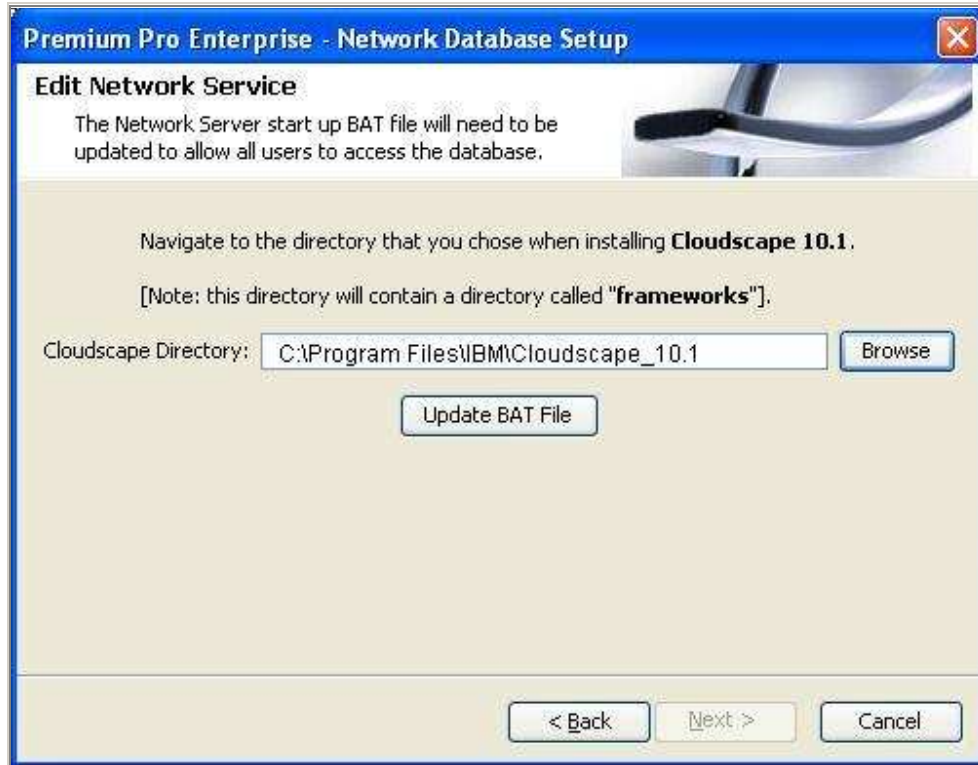


17. Cloudscape 10.1 has a BAT file that needs to be updated. This process has been automated for you. Click the **Browse** button and navigate to the Cloudscape directory that you made note of earlier.





16. The Cloudscape directory should now be listed in the Cloudscape Directory text box. Click on the **Update BAT File** button.



17. Once the BAT file has been successfully updated, the **Next** button will be enabled. Click on **Next**. A message box will appear stating the Cloudscape Network Server will be started. When the server is started, a new window will appear. This window will need to remain open until the end of the installation of the Premium Pro Enterprise[®] Network Database. Click **OK**.



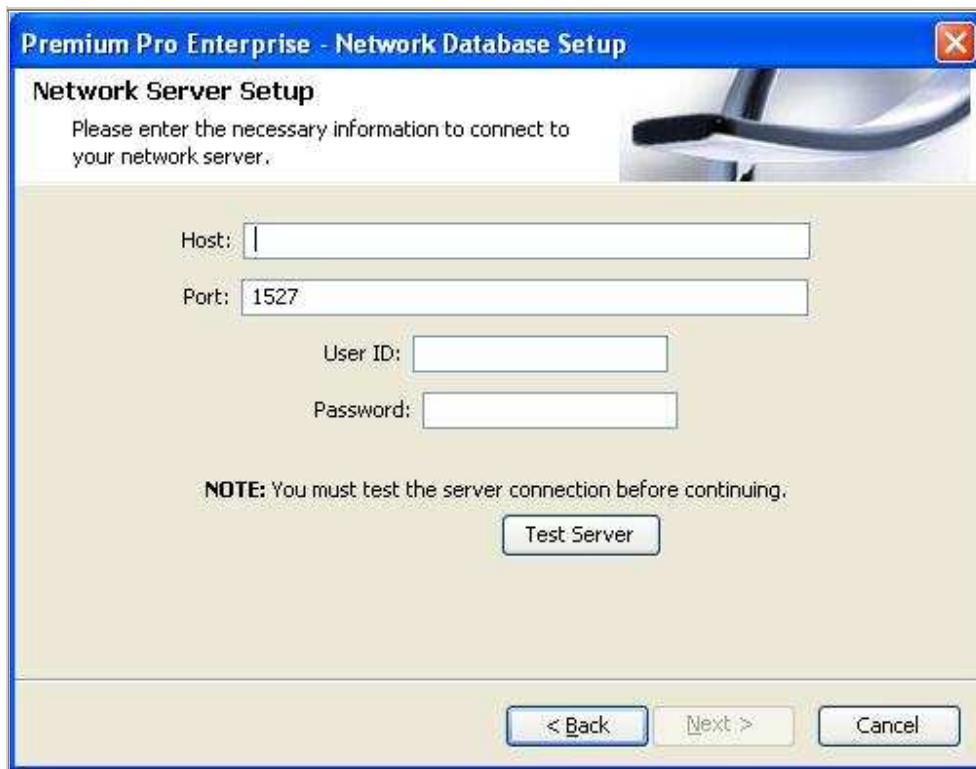
18. When IBM Cloudscape successfully starts you will see this window.



19. **NOTE:** The Cloudscape Network Server needs to be up and running to install the Premium Pro[®] database. As long as this window is open, the Cloudscape Network Server is running.

20. **DO NOT CLOSE THIS WINDOW.**

21. On the Network Server Setup screen please specify the host and port of the server where the Premium Pro Enterprise[®] database will be installed. This will be the server on which you installed Cloudscape in the previous section.



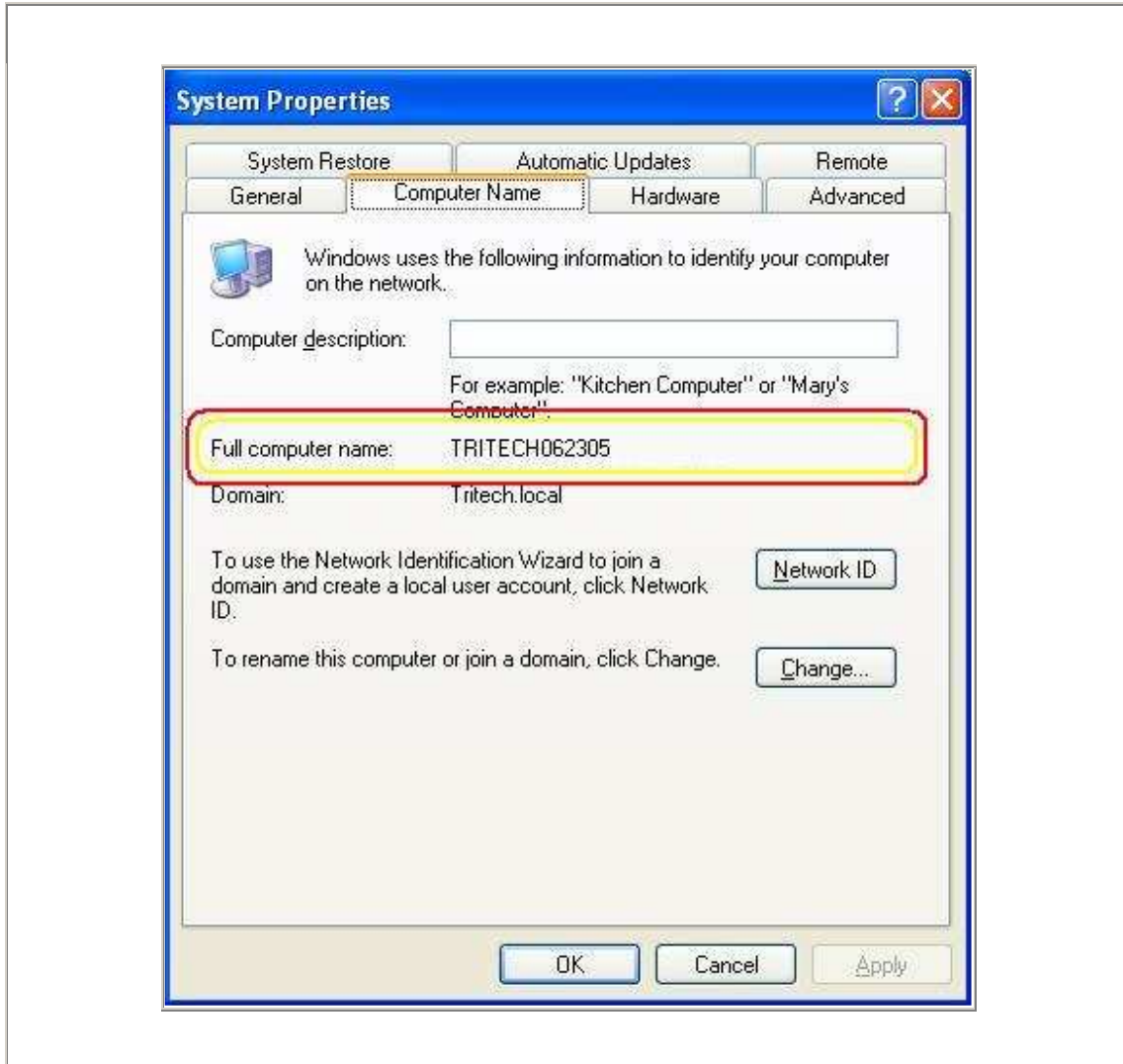
22. **Host:** - the name of the server where you installed Cloudscape 10.1

To find out the name of the server, please log onto the server itself.

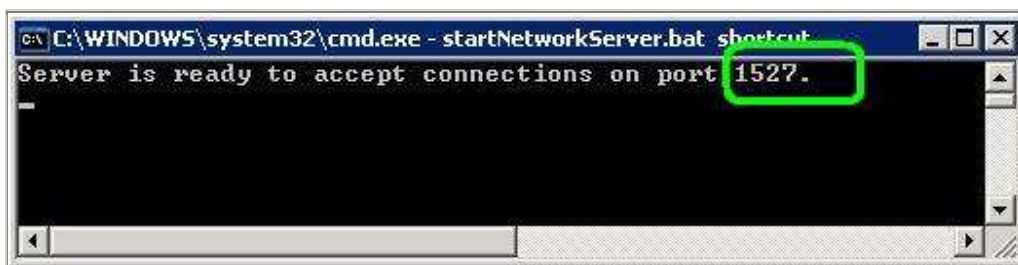
On the server's desktop right-click on the "**My Computer**" icon and select "**Properties**".



On the "**Computer Name**" tab, you will see "**Full computer name:**". Make note of this. You will enter this in the **Host:** field on the Premium Pro Enterprise[®] Database Installation Wizard page.

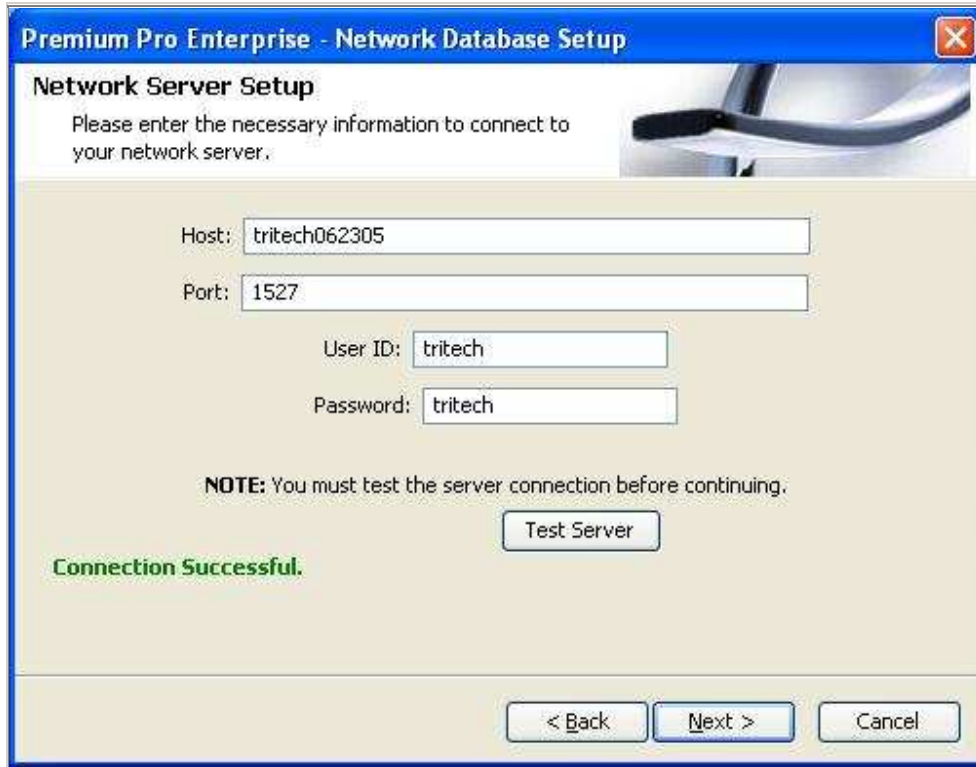


23. **Port:** - this should be 1527. It will be the same port number shown when you started the Cloudscape Network Server.



24. The User ID and Password will be how the Premium Pro Enterprise[®] application logs into the database through Cloudscape. Use "tritech" for both. **User ID:** - "tritech" **Password:** - "tritech"

25. Once the data has been entered, click **Test Server**. Verify you receive a message stating **Connection Successful**. Click **Next**



Premium Pro Enterprise - Network Database Setup

Network Server Setup

Please enter the necessary information to connect to your network server.

Host:

Port:

User ID:

Password:

NOTE: You must test the server connection before continuing.

Connection Successful.

Test Server

< Back Next > Cancel

26. Note: If you should happen to point to a server that had previously been installed with a Premium Pro Enterprise[®] Network Database or if you choose to re-install the Premium Pro Enterprise[®] Network Database, you will receive a warning that a database has been found. If you continue, the database will be overwritten and all data will be lost.



27. Click **Finish**.



28. Please wait for the final confirmation message and click **OK**.



29. The database has been installed.

*[NOTE: If there were errors during the installation, you would be referred to the log file **C:\P2EE_DB_Network_Install.LOG** for more information.]*

30. You will see a message box that will direct you to shut down the Cloudscape Network server.

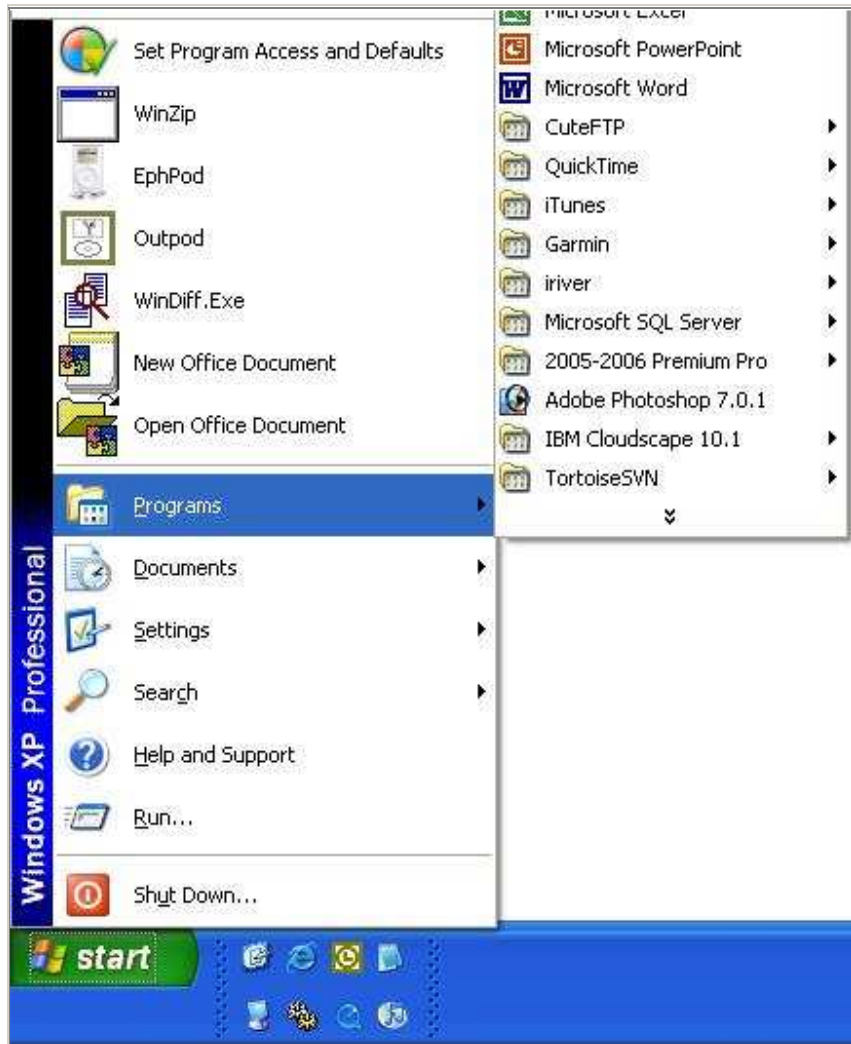


31. Just click the top right X to close the window of the Network Server.



32. Copying the 'Start Network Server' to the Startup folder:
To automatically start the Cloudscape Network Server when you restart your machine, please copy the 'Start Network Server' to your Startup folder. Please review all steps before proceeding. You will not be able come back to the Installation Guide while performing this process.

a. Go to the Start menu ► Programs

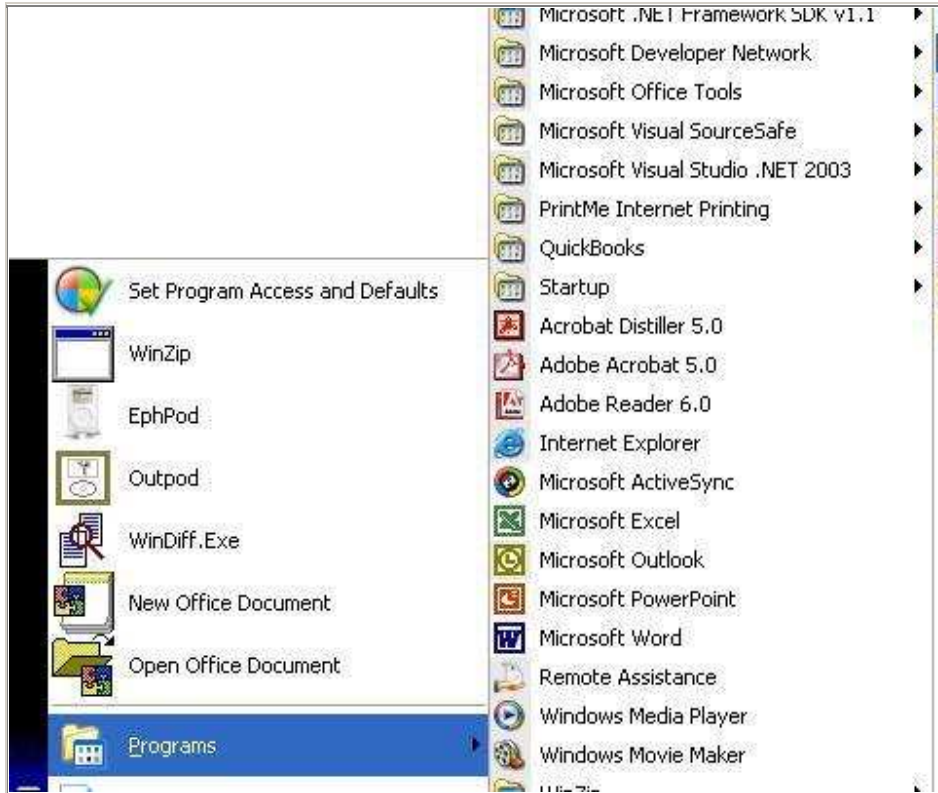


b. If you see this at the bottom of your program list



c. Click on it to show all your program folders.

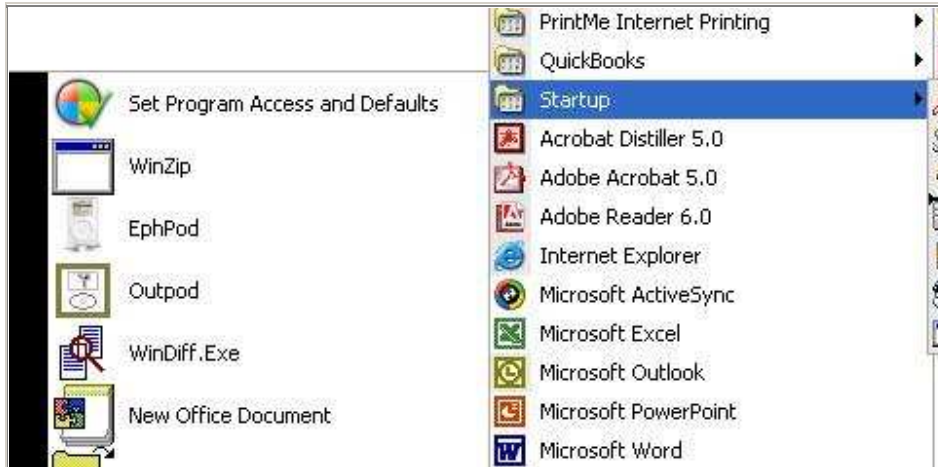
d. Go to the Start menu ► Programs ► IBM Cloudscape 10.1 ► Network Server ► "Start Network Server".
With the mouse pointer over the 'Start Network Server', press down on the right mouse button **AND KEEP IT HELD DOWN UNTIL DIRECTED TO RELEASE IT.**



e. Drag the "Start Network Server" program over the **Startup** folder, and hold it there until the contents of the **Startup** folder is displayed.



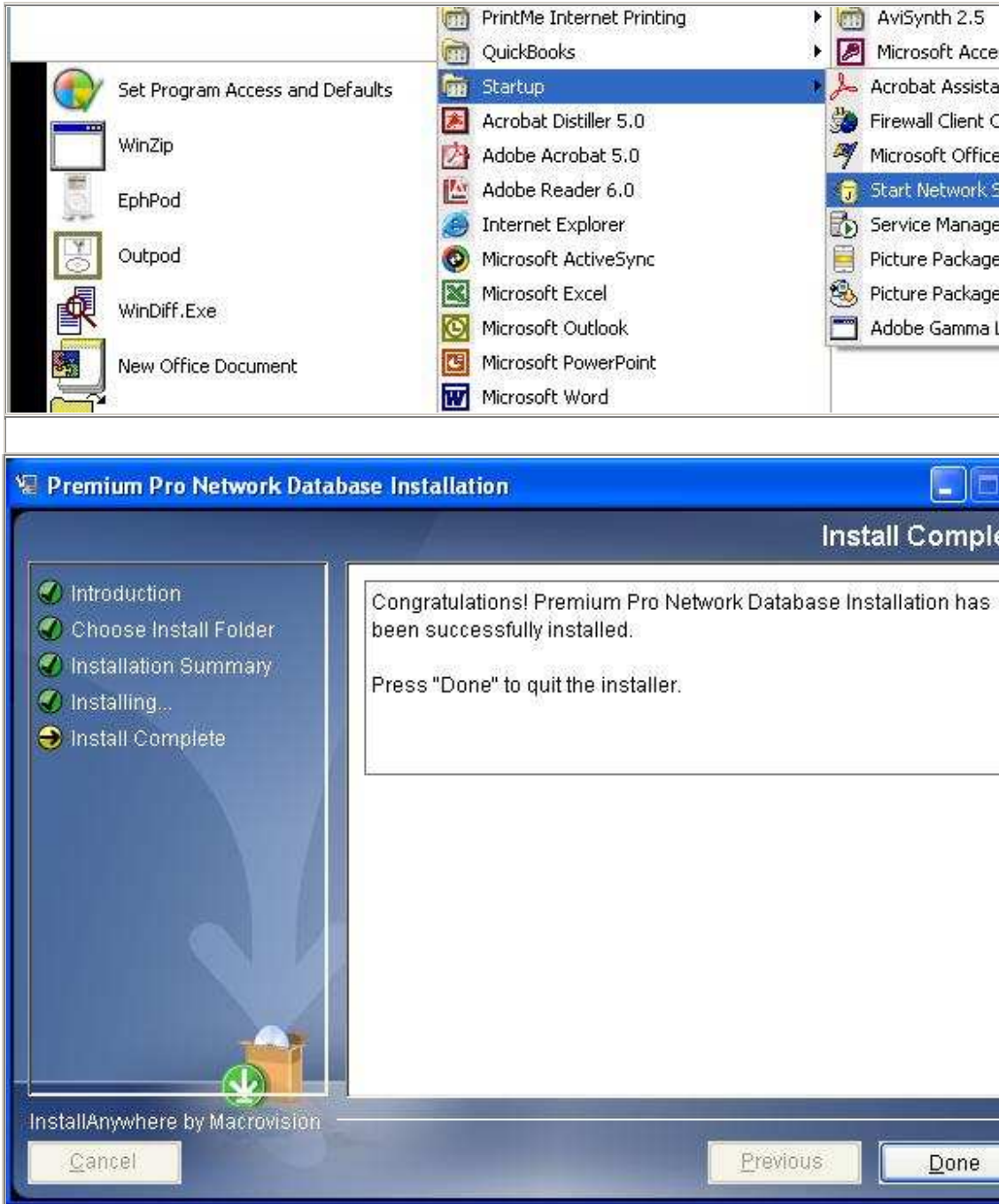
f. Drag the "Start Network Server" program into the **Startup** folder's program list. You will see a black bar in the menu where the program will be "dropped".



g. **NOW** you may release the right mouse button. A new menu will pop up. Select **Copy Here**.



h. The "Start Network Server" program should now be listed in the **Startup** menu.



You have now successfully configured your network server for Premium Pro Enterprise[®].

Chapter 3: Installing Premium Pro Enterprise

Requirements:

You must complete registration (Chapter 1) and complete the database installation (Chapter 2) before you can install Premium Pro Enterprise (PPE). You must be able to access our login server and update server (Chapter 4).

Determine what server to install PPE to. You may install it to the same server where the database was installed. Or you may install it to another server. A typical network share is sufficient because PPE is a fat client.

Installation:

Download the PremiumProEnterpriseInstallation.exe from here:

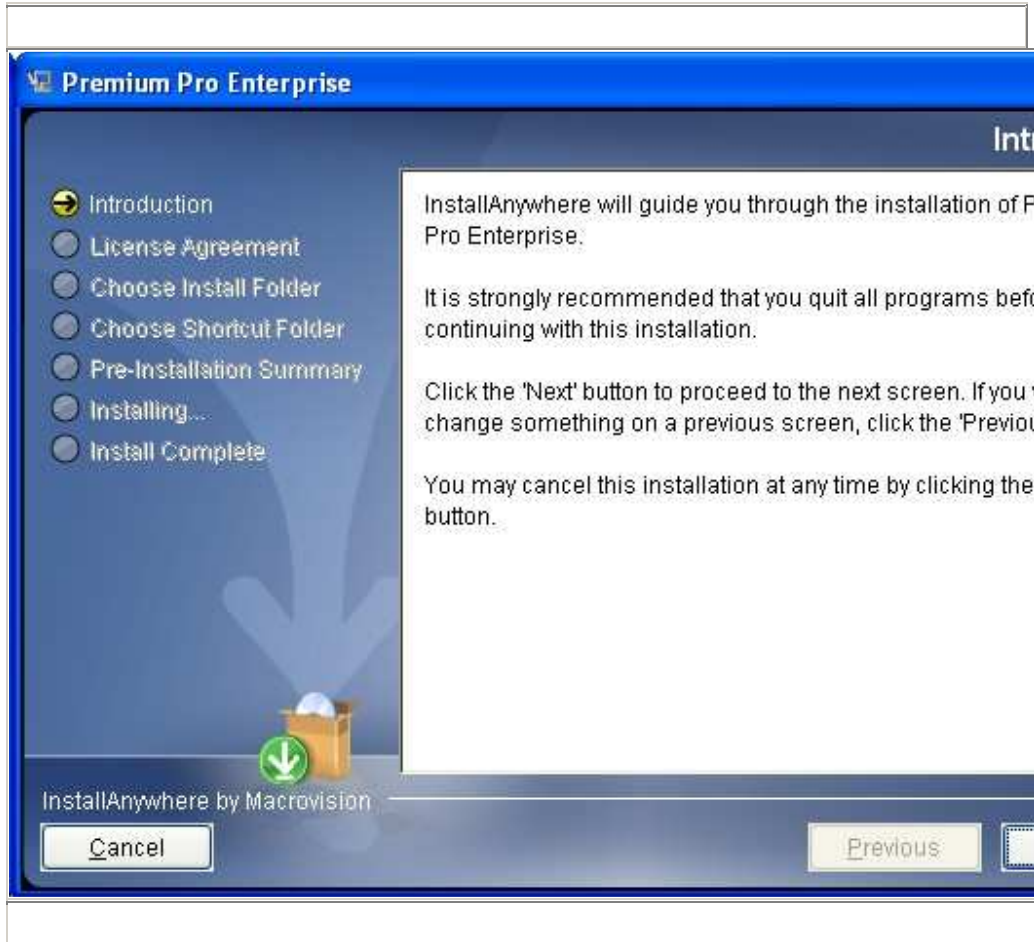
<http://enterprise.tritechsoft.com/installs/>

Click on the hyperlink for PremiumProEnterpriseInstallation.exe.

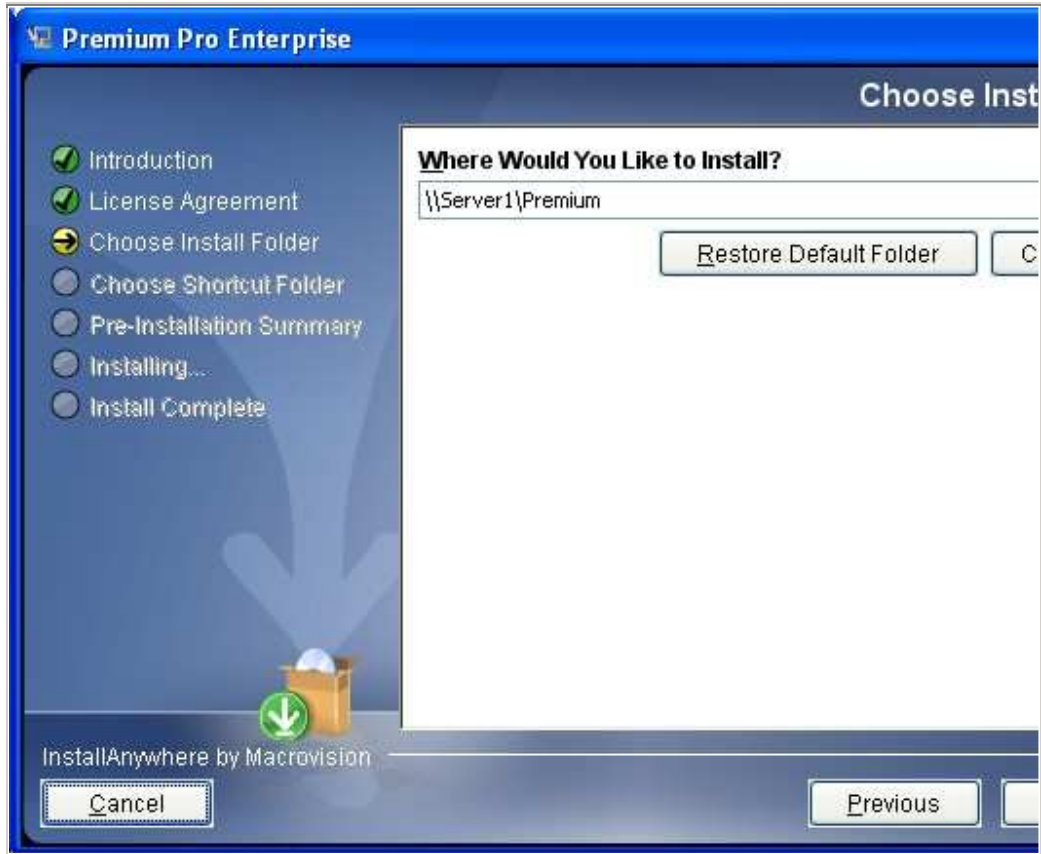
1. Click run to download the file and install it. Otherwise, click **Save** and you may installed the program at a later time.



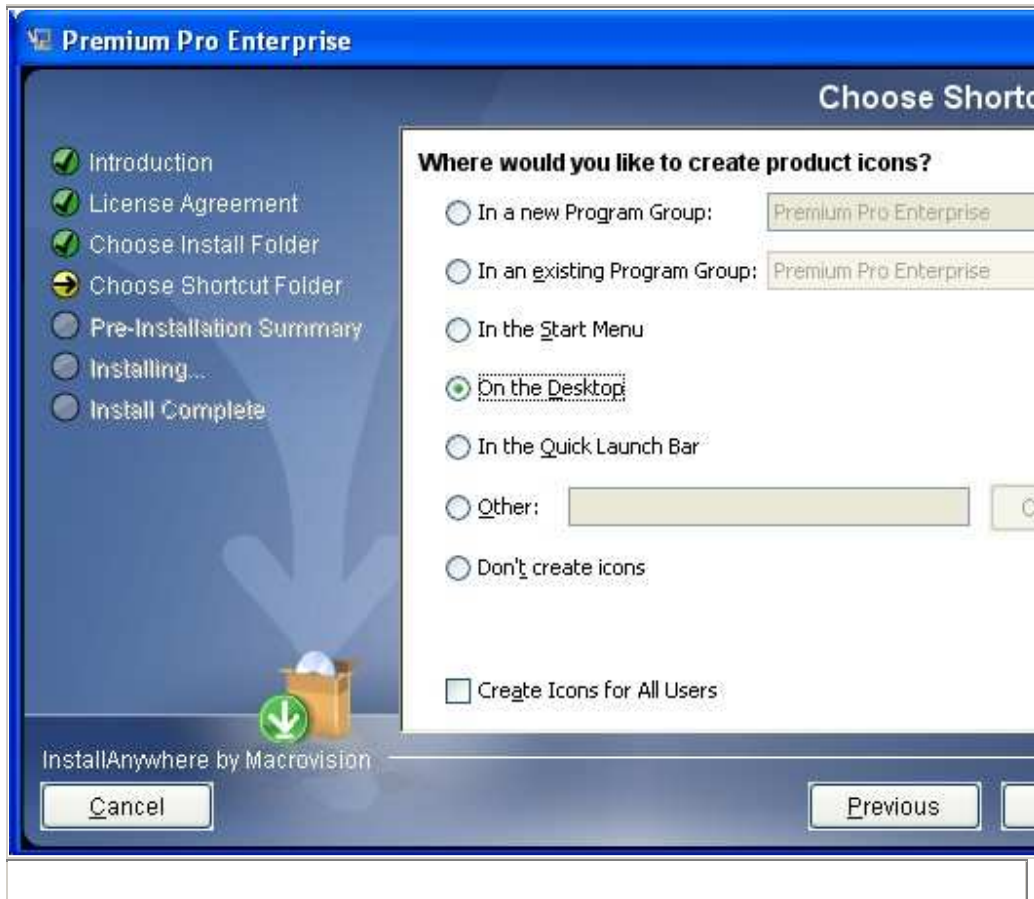
2. The installation program will start. Click **Next**. Accept the license agreement and click **Next**.



3. When you are prompted where to install, click on choose to navigate to the server. You can either use a mapped drive or a fully qualified path (UNC - For example: "\\Server1\Premium").



3. When prompted "Where would you like to create product icons?" choose from one of the selections. You may later use the icon to launch PPE from your desktop PC. Click **Next**.



4. Review the Pre-Installation Summary to insure your selections are correct. Click **Install** to proceed. The installation will install a self contained version of Java Runtime Environment (JRE). JRE is self-contained in this folder so that it will not affect any other programs you use that require JRE. When the installation is completed, click **Done** to quit the installer.

5. **The installation program is completed.** However, you must Launch PPE so that you can configure PPE to use the Cloudscape database you created in Chapter 2.
- Using the icon you created in step 3, enter a **registered** username and password and click **Login**.
 - If you have not yet registered your company to use PPE, please see Chapter 1.



6. Accept the license agreement. You will now be prompted to create a local installation directory. (C:\PremiumProEnt). Accept this default directory or choose another. Click Next. When prompted to choose your Install Type, choose **Server Installation**.



7. On the next dialog, Select **IBM Cloudscape/Apache Derby** and enter the appropriate information needed to connect to your network database. Please see Chapter 2 for more detailed information.

Enter the password and id. The User ID and password are specified during the Database Installation (See chapter 2). The standard user ID and password are: User ID: tritech Password: tritech

Click the **Test Server** button to verify you are able to connect to the database. You should see **Connection Successful**.



8. Finish the Installation Wizard. You are now ready to give individual users access to the PPE. Note: all users will be accessing the same database, the one you previously configured.

Chapter 4: Establishing Appropriate User Rights

As stated earlier, Premium Pro Enterprise (PPE) is a fat client. Once the user launches the application, all activity is initiated from the desktop PC. This means that minimum system requirements regarding processor speed and memory apply to each user's desktop PC. Each user must have sufficient rights and privileges to the Cloudscape database, to PPE, and to our web servers. If the details in this chapter are not followed, the user cannot run PPE.

Internet Access

The PC must be able to access the Internet. There are three purposes for which PPE connects to web servers over the Internet:

- 1) Log in (validation of user credentials and verification of product licensing)
- 2) Software Updates
- 3) Electronic Filing

PPE cannot be configured to understand your firewall/proxy server rules. If necessary, you must change your rules so the user's PC can access the PPE web servers.

Log In

Each time a user launches PPE, he or she is prompted for a user name and password (See Chapter 1 to register a user). This information is transmitted over the Internet to a TriTech operated web server which replies with an XML message that provides the application with licensing (and other) information.

If there is a firewall or proxy server between the computer(s) running PPE and the internet, the firewall or proxy server must be configured to allow the following:

1. HTTPS POST requests sent to port 443 of the web server
2. HTTPS 200 responses (containing XML data) received from the web server

The web server in question is: ppo.tritechsoft.com

If you use a proxy server, you may receive a message indicating "the program was not able to connect to the server for login". Select the link "Click Here" and then click to "Update Proxy Settings". Enter the proxy host information and port number here.

Software Updates

Updates to PPE are released frequently. PPE has built-in functionality which allows the user to initiate software updates. In order to check for and perform an update, the Premium Pro Enterprise software communicates with a TriTech web server over the Internet. The desktop PC initiates a request to access a file containing a list of current program files and compares this list to the files on the PPE server.

If there is a firewall or proxy server between the computer(s) running PPE and the internet, the firewall or proxy server must be configured to allow the following:

1. HTTP GET requests sent to port 80 of the web server.
2. HTTP 200 responses (containing XML data) received from the web server
3. HTTP 401 responses (Authorization required) received from the web server
4. HTTP PROPFIND requests sent to port 80 of the web server
5. HTTP 207 responses (Multi-status) (containing XML data) received from the web server

The web server in question is: enterprise.tritechsoft.com

If you use a proxy server, you must login into the application and select the tools menu and select "Update Center". Enter the http port and proxy information.

Electronic Filing

PPE allows certain tax forms to be submitted electronically over the internet. In order to do so, the Premium Pro Enterprise software transmits the information to a TriTech web server over the Internet. The web server responds with an XML message letting PPE know whether the operation was successful.

If there is a firewall or proxy server between the computer(s) running Premium Pro Enterprise and the internet, the firewall or proxy server must be configured to allow the following:

- 1) HTTP POST requests sent to port 80 of the web server
- 2) HTTP 200 responses (containing XML data) received from the web server

The web server in question is: www.tritechsoft.com

The following page is a table that details the HTTP get and propfind request and response codes.

Protocol	Command/Response code	URI or Response code meaning	Protocol Version	Message Body	Notes
HTTP	GET	/version.xml	(HTTP/1.1)	contents of version.xml	
HTTP	200	OK	(HTTP/1.1)	contents of version.xml	
HTTP	GET	/details.xml	(HTTP/1.1)	contents of details.xml	
HTTP	200	OK	(HTTP/1.1)	XML containing details of request	
HTTP	PROPFIND	/svn/enterprise	(HTTP/1.1)	XML containing details of request	
HTTP	401	AUTHORIZATION REQUIRED	(HTTP/1.1)		This time authentication credentials are included in header
HTTP	PROPFIND	/svn/enterprise	(HTTP/1.1)	XML containing details of request	
HTTP	207	MULTI-STATUS	(HTTP/1.1)	XML containing requested details	
HTTP	PROPFIND	/svn/enterprise;/svn/vcc/default	(HTTP/1.1)	XML containing details of request	Authentication credentials are included in header
HTTP	207	MULTI-STATUS	(HTTP/1.1)	XML containing requested details	
<p>Many more of these PROPFIND requests for other files and associated 207 responses will follow. Based on the details contained in the 207 response the application may request the file via a HTTP GET command. Below is an example of this exchange.</p>					
HTTP	PROPFIND	/svn/enterprise/premium/premium.jar	(HTTP/1.1)	XML containing details of request	Authentication credentials are included in header
HTTP	207	MULTI-STATUS	(HTTP/1.1)	XML containing requested details	
HTTP	GET	/svn/enterprise/premium/premium.jar	(HTTP/1.1)	contents of premium.jar	
HTTP	200	OK	(HTTP/1.1)		

The remaining traffic is of this nature: a PROPFIND request followed by a 207 response which may or may not be followed by a GET and 200 response.

Chapter 5: Workstation Installation

1. Create a shortcut on the user's PC desktop. The target you select should be identical to the path you selected for the Premium Pro Enterprise installation (See Chapter 3 step 3), followed by "Enterprise.exe". You can use a mapped drive or UNC path.

Example:

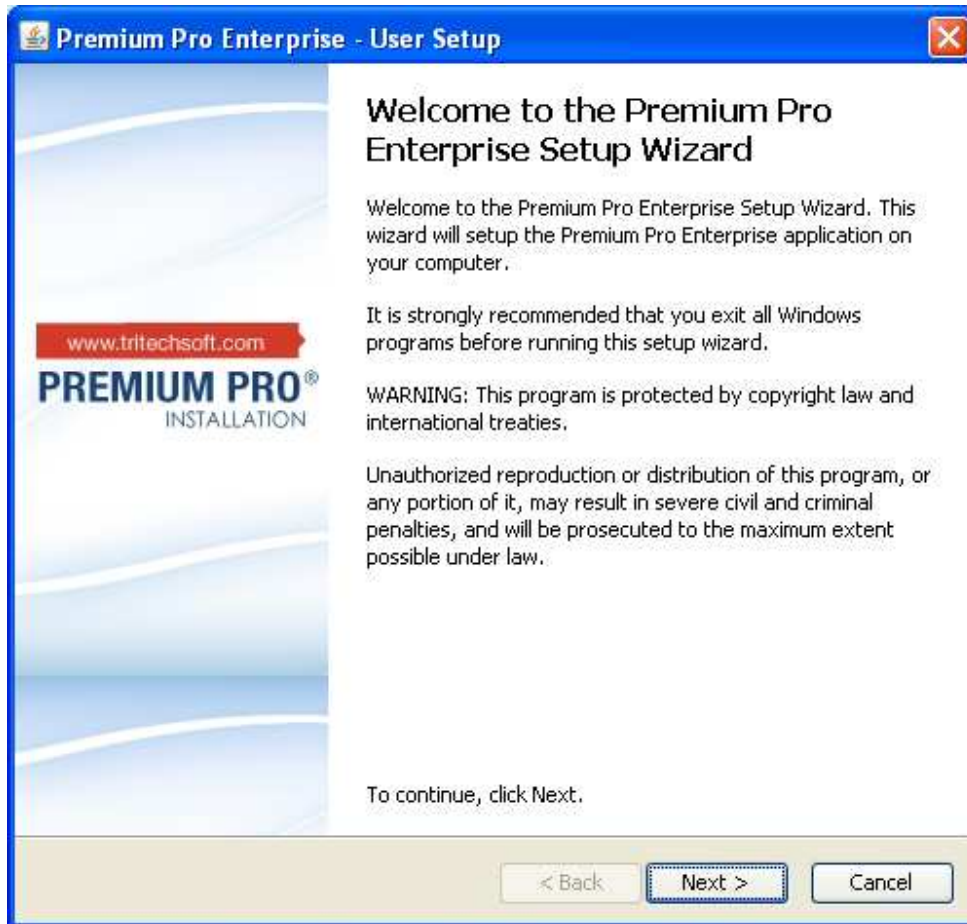
\\ServerA\Premium Pro Enterprise\Enterprise.exe

Z:\Premium Pro Enterprise\Enterprise.exe

2. Double click on the shortcut to launch the application. Enter a **registered** username and password and click **Login**. See chapter 1 on how to register a user.

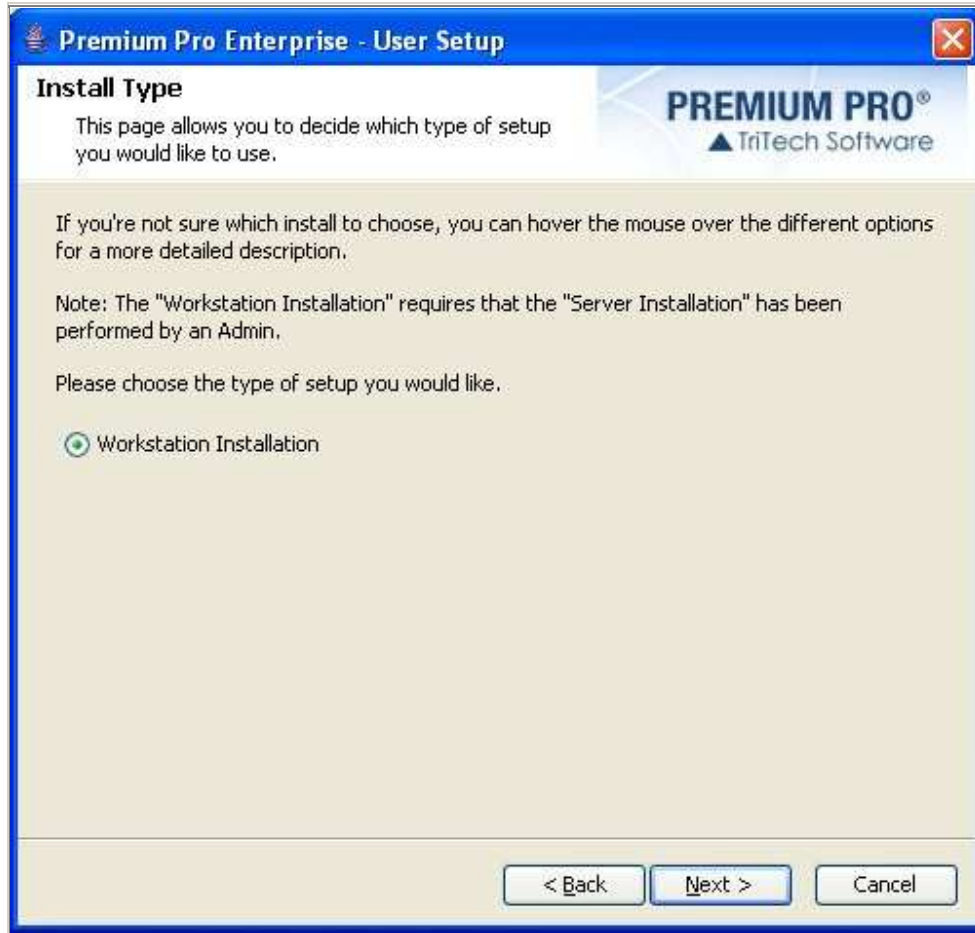


3. The Enterprise Setup Wizard will launch. Click **Next**. Accept the license agreement and click **Next**.



4. You will be prompted to select a local installation directory on the desktop PC's C drive. Accept the default directory or chose another.

5. When you reach the dialog to choose your Install Type, choose **Workstation Installation**.



6. Note: You do not need to setup the database connection, as this has already been done for you.
7. Finish the Installation Wizard.

Chapter 6: Update Center

Updates to the program are downloaded from the update center web server.

Please note that in order for a user to use the update center, he/she must have the following rights:

- Must be registered as an administrative user (Chapter 1)
- Must have Internet Access to `enterprise.tritechsoft.com` (Chapter 4).
- Must have sufficient rights to the PPE directory on the server (the location of this directory is specified in Chapter 3. The user must be able to add and replace files.
- Must have permissions to create or alter tables in the Cloudscape database.

The *Premium Pro Enterprise* Update Center may be accessed from the Tools Menu. The update center will provide a listing of any updates made to the software and provide you with detailed information regarding the changes. Through the Update Center you can choose when to install the updates and review the items that will be affected by the update.

Software Updates Tab

This area provides a listing of files organized by Product (e.g. Premium Tax, Municipal, and FormsPlus), Tax year and Module. Each state will list its status and the date it was last updated. If the files are current, the status will read "Good". If a change was made, the status will display as "Update Available". When a state is highlighted, details such as date, version number, and comments are displayed for the specified file.

Preference Tab

Under the Preference Tab, you can specify your Network Access setting for software updates. If connecting through a proxy server, enter the http port and proxy information.

Important: All other users must exit the application while the Registered Admin User is performing an update. Failure to do so may cause the update to be unsuccessful.

Chapter 7: Other Considerations

Minimum System Requirements

The estimated disk storage requirements for a single company and single year are:

- Premium Tax - 10MB
- Municipal - 34MB
- FormsPlus - 2 MB

The following are the minimum system requirements needed to install *Premium Pro Enterprise* on the product server (chapter 3)

- Pentium IV 1 GHz
- Microsoft Windows 2000 or later
- 512 MB RAM (1G RAM recommended)
- 250 MB local or network hard drive space for the program files

The following are the minimum system requirements needed to adequately run PPE from a desktop PC.

- Pentium IV 1 GHz
- Microsoft Windows 2000 or later
- 512 MB RAM (1G RAM recommended)
- Internet access (Chapter 4)
- Network rights (Chapter 4 and 5)

Firewall / Proxy Server Considerations

- Premium Pro Enterprise does not take settings from the browser setup.
- Proxy Server Authentication is not supported.