

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

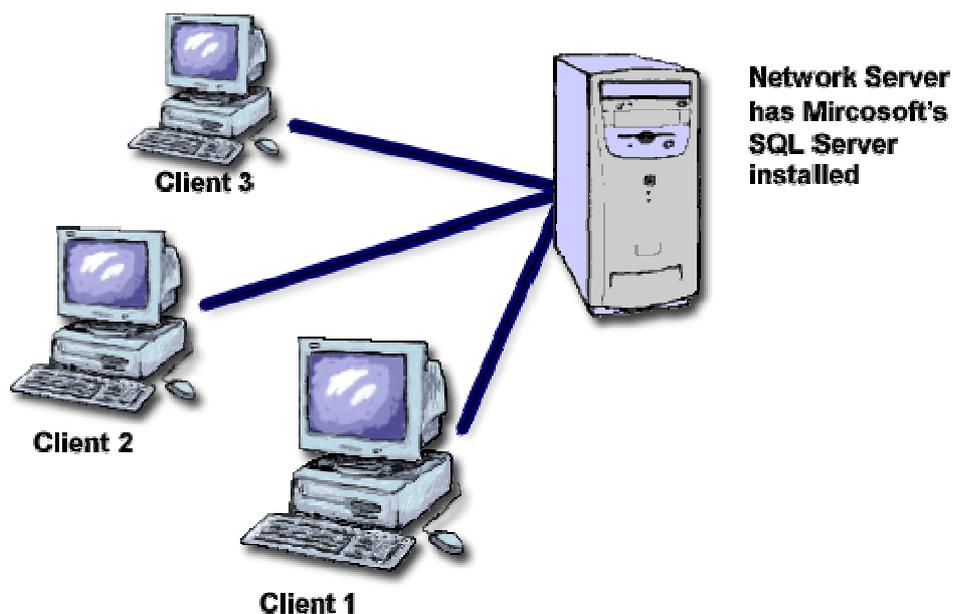
This installation guide should be used when you intend on using SQL Server (2000 or 2005) or SQL Express for the Enterprise database. Please note that a SQL database administrator or similarly qualified person will most likely be needed to perform the database installation.

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

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

PPE is a fat client. This means that 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. Any 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, the network SQL server.



## 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/>.



The screenshot shows the 'Administrator User Login' page for Premium Pro Enterprise. On the left, the logo 'PREMIUM PRO ENTERPRISE' is displayed with the tagline 'EXPERIENCE THE NEXT GENERATION' and a link 'Click here for more information..'. The main content area features a login form with fields for 'Username' and 'Password', a 'Sign In' button, and a 'Forgot your password?' link. Below the form, a red warning message states: 'If your company has previously registered for MPFP Online, you must log in using the existing MPFP Online administrative user name and password. Please contact the parties responsible for MPFP Online use within your company for this information.' At the bottom, there are two buttons: 'Install Now' and 'Sign Up Now'. The footer includes the TriTech Software logo and copyright information: '©1995-2007, TriTech Software Development Corp. All rights reserved.'

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

The first step is to install the database. Before you begin, you will need to install one of the following to a server:

- SQL Server 2000
- SQL Server 2005
- SQL Server 2005 Express

You will also need the following for SQL Server and SQL Server Express:

- The "SA" password.
- The name of the machine that is hosting SQL Server or SQL Express.

Please note that if you plan to use a database with a named instance instead of a standard Port Number, you will have to use the SQL scripts we provide to create the database. SQL Express requires a named instance, so you cannot use this installation. If you would prefer to configure the database using SQL scripts or if you have other questions regarding database configuration, please contact us at [enterprise@tritechsoft.com](mailto:enterprise@tritechsoft.com) or [support@tritechsoft.com](mailto:support@tritechsoft.com)

Download the EnterpriseSQLInstall.exe from here:

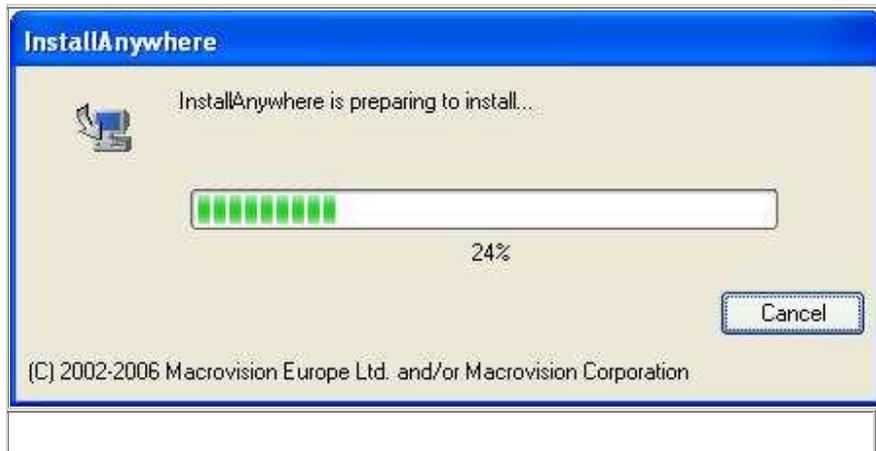
<http://enterprise.tritechsoft.com/installs/>

Click on the hyperlink for EnterpriseSQLInstall.exe.

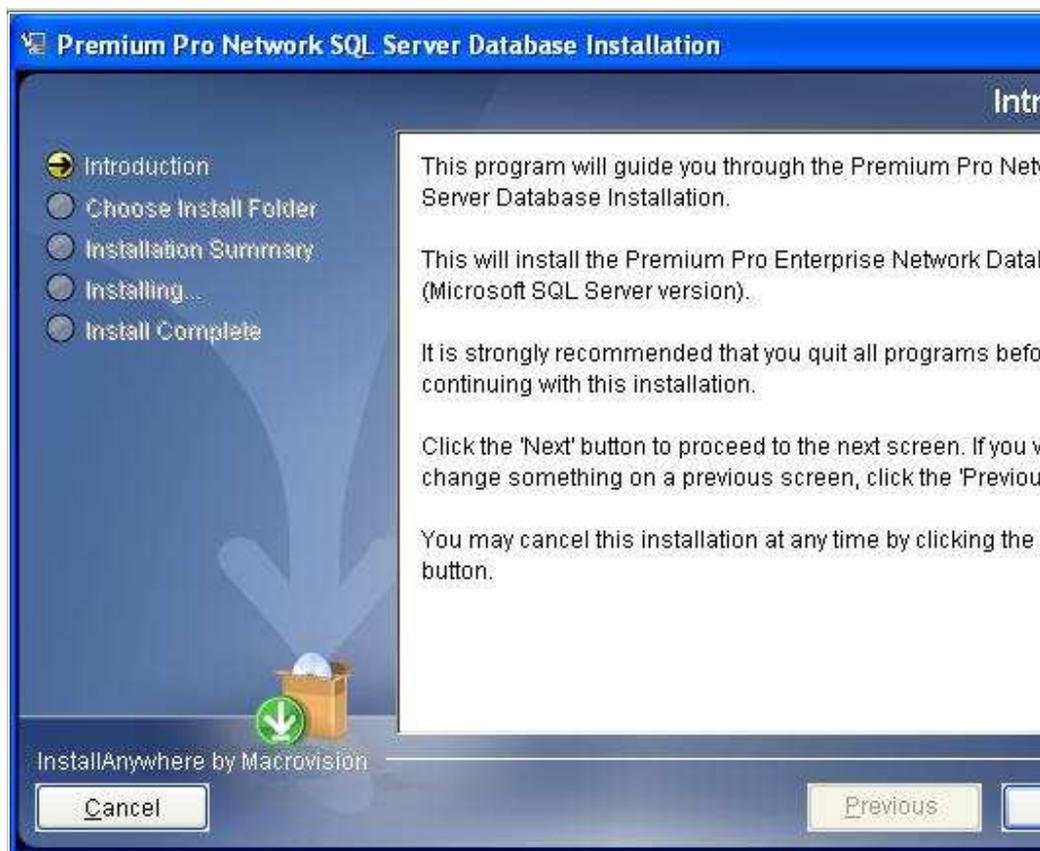
1. Click run to download the file and install it. Otherwise, click **Save** and you may installed the program at a later time.



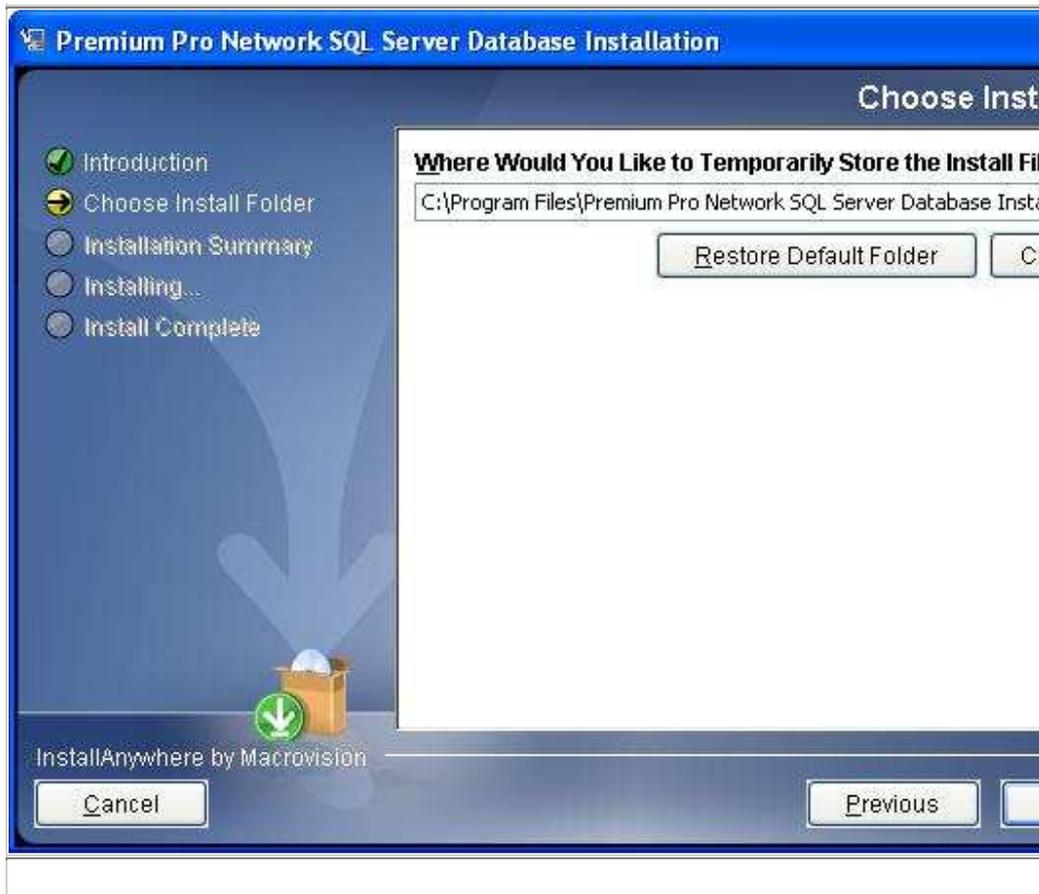
2. The installation program will start up.



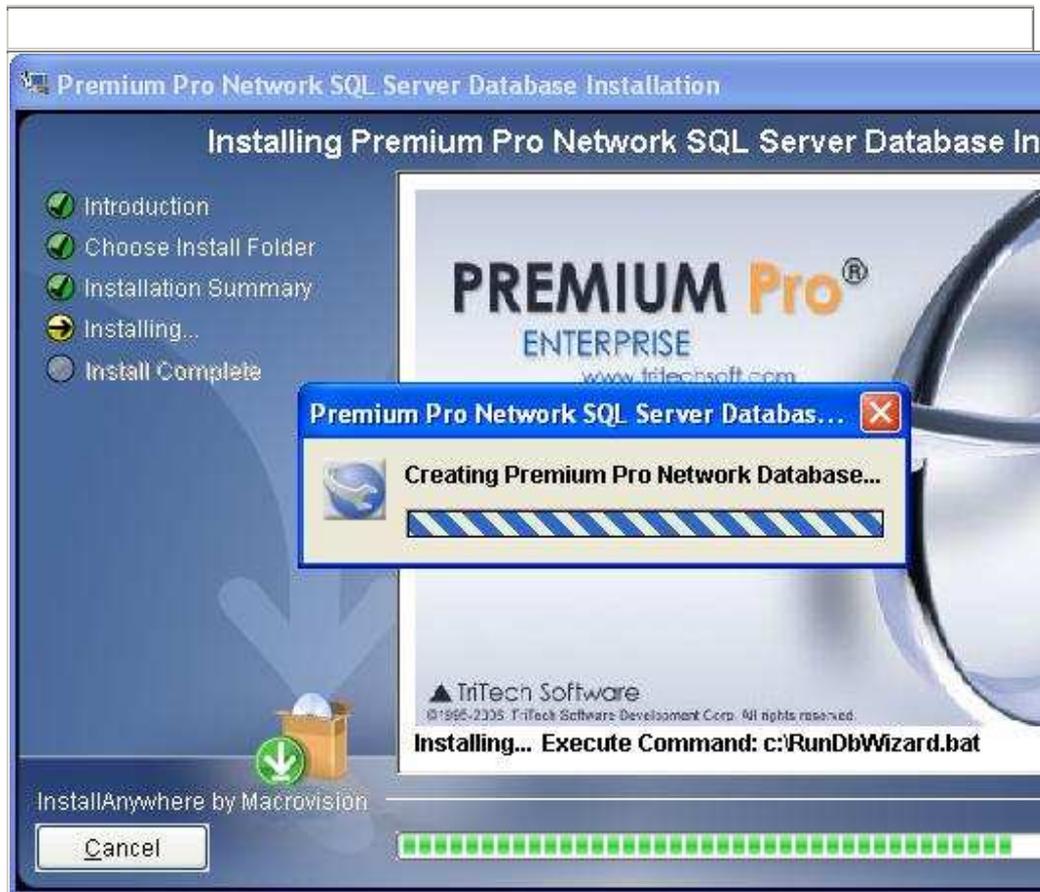
3. Click on **Next** to begin the installation.



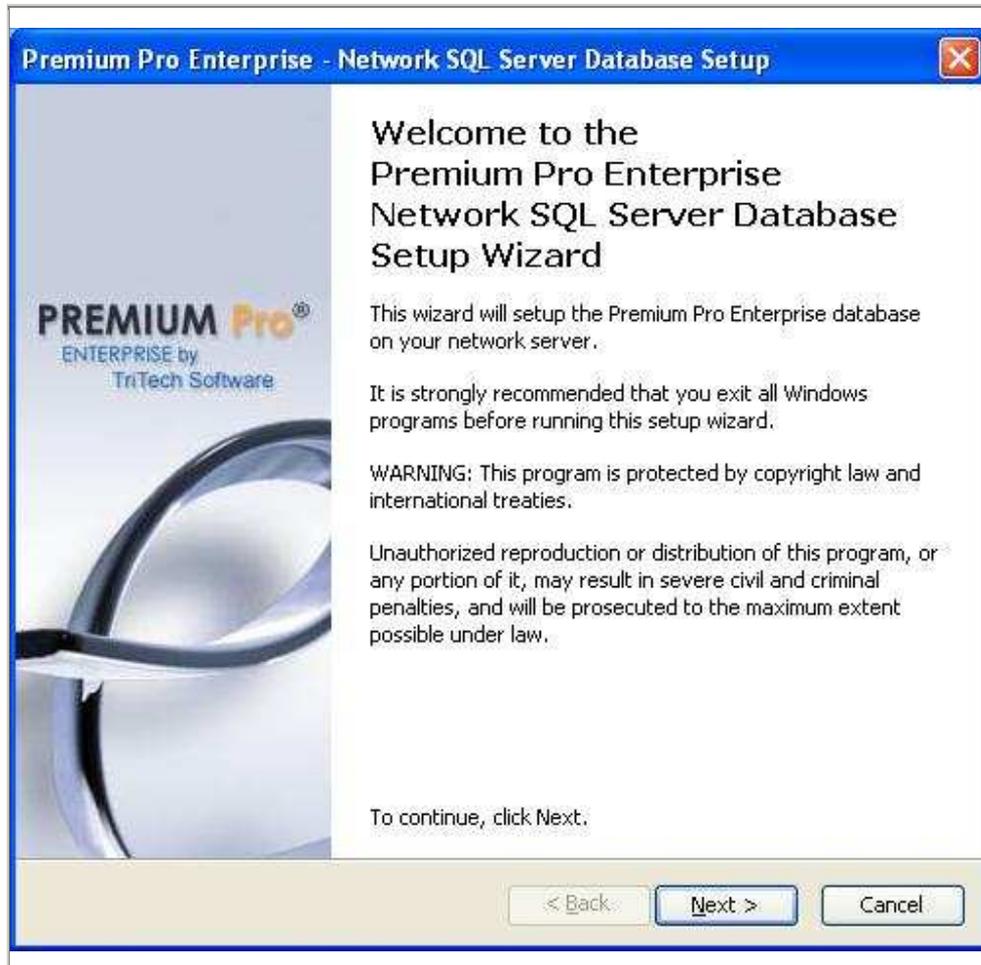
4. Accept the default directory to install the Enterprise SQL Setup Wizard. Or you may change the directory. A shortcut to the wizard will be created on your desktop. After you have completed the installation, you may uninstall the Enterprise SQL Setup Wizard via the Windows control panel. Click **Next**. Review the installation summary to review your selections and then click install.



5. The installation program will install the Java Runtime Environment (JRE) into the temporary installation folder (SQL Setup Wizard). JRE will then run so that the database installation may be completed. JRE is self-contained in this folder so that it will not affect any other programs you use that require JRE.



6. The Network Database Wizard will load after a few moments. It will guide you through the installation. Click **Next**. Accept the License Agreement and click **Next**.



7. The Network Server Setup screen requires you to specify the host and port of the server where the Premium Pro Enterprise<sup>®</sup> database will be installed. This will be the server which hosts the SQL Server.

**Premium Pro Enterprise - Network SQL Server Database Setup**

**Network Server Setup**

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

Host:

Port:

Premium Pro's User ID:

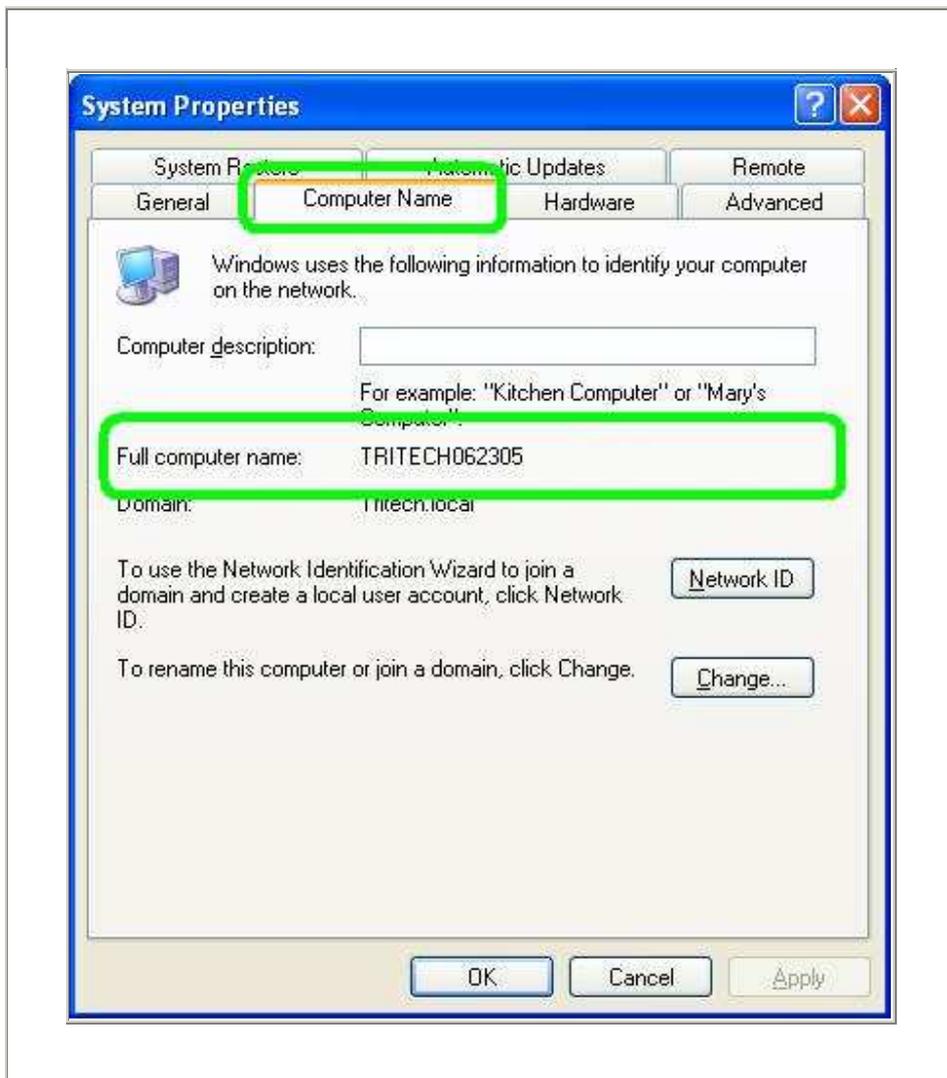
Premium Pro's User Password:

SQL Server's "sa" Password:

**NOTE:** You must test the server connection before continuing.

**A. To determine the Host** (the name of the server where your SQL Server resides), please follow the steps below:

- Log onto the server. On the server's desktop, right-click on the "**My Computer**" icon and select "**Properties**".
- Select the "**Computer Name**" tab and take note of the "**Full computer name:**" Enter this name in the **Host:** field on the Premium Pro Enterprise<sup>®</sup> Database Installation Wizard page.



**B. Port:** Typically this should be 1433. But you may choose another.

**C. Premium Pro's User ID and Password:** This is the password and ID that will be used when Premium Pro Enterprise<sup>®</sup> logs into the database through SQL Authentication. The password must conform to the SQL Server's requirements. Please use the following:

**User ID:** - "tritech"

**Password:** - "Tr1t3ch2"

**D. SQL Server's SA password.** The password for the SQL Server's system admin user (the "SA" User) will need to be entered. This is used to create the necessary databases.

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

**Premium Pro Enterprise - Network SQL Server Database Setup**

**Network Server Setup**

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

Host:

Port:

Premium Pro's User ID:

Premium Pro's User Password:

SQL Server's "sa" Password:

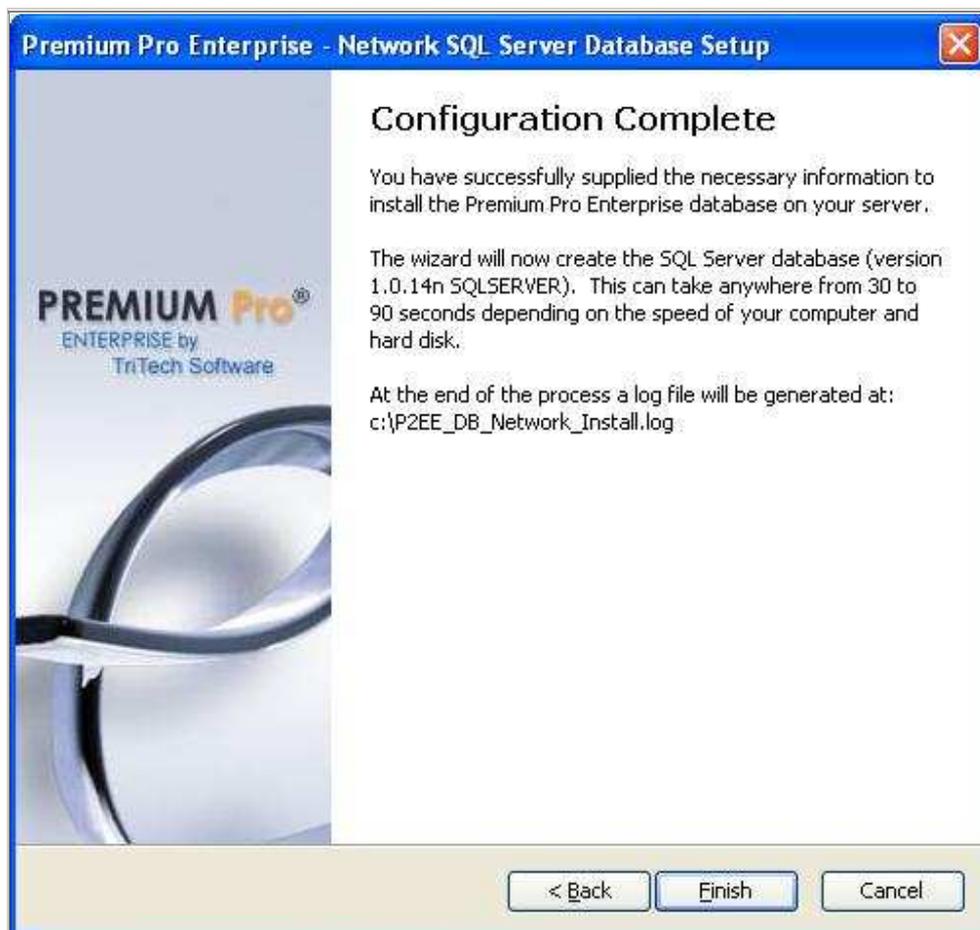
**NOTE:** You must test the server connection before continuing.

**Connection Successful.**

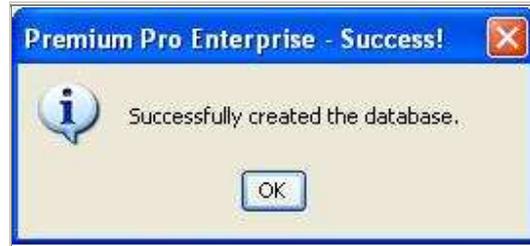
- Note: If you choose a server where you have previously run the EnterpriseSQLInstall.exe or if you choose to re-install EnterpriseSQLInstall.exe, you will receive a warning that a database has been found. If you continue, the database will be overwritten and all data will be lost.



- Click **Finish**.

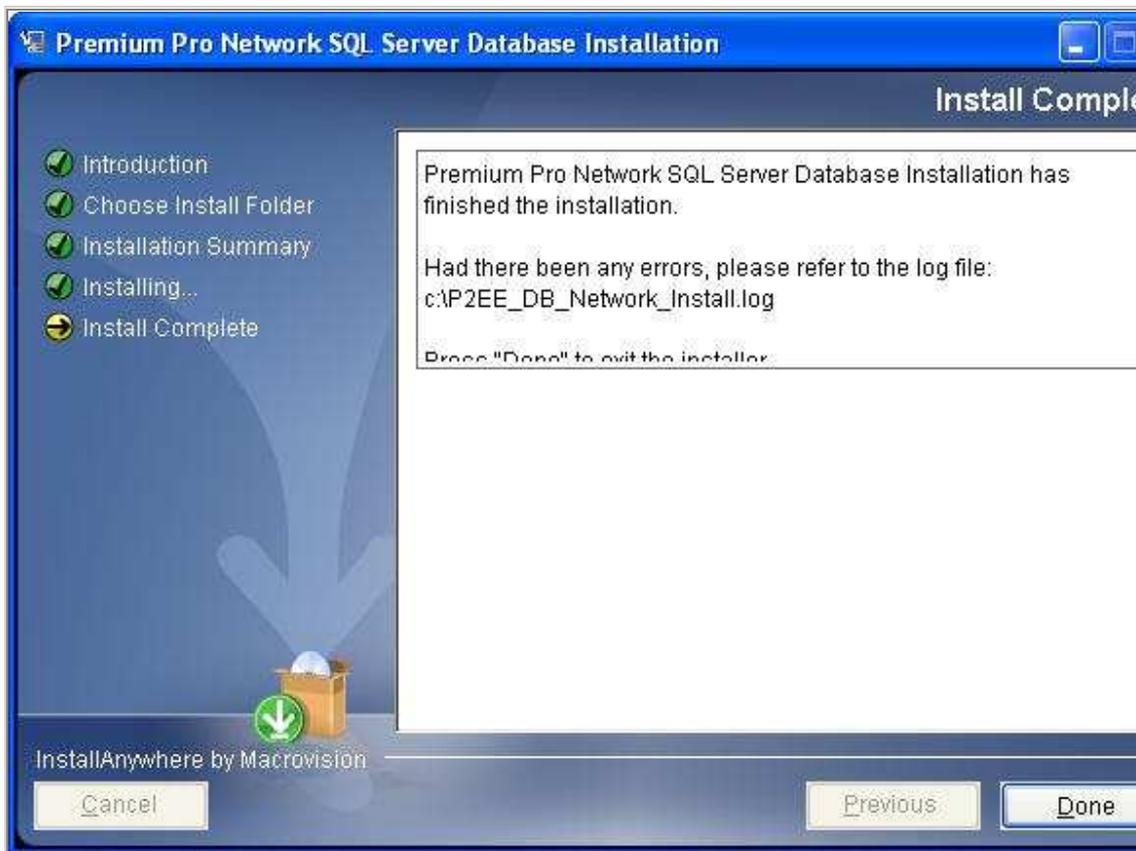


- Please wait for the final confirmation message and click **OK**.



11. The database has been installed. You have now successfully configured your network server for Premium Pro Enterprise®.

**[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.]**



## Chapter 3: Installing Premium Pro Enterprise

### Requirements:

You must complete registration (Chapter 1) and complete the database installation of SQL Server or SQL Server Express (Chapter 2) before you can install Premium Pro Enterprise (PPE). In addition, 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:

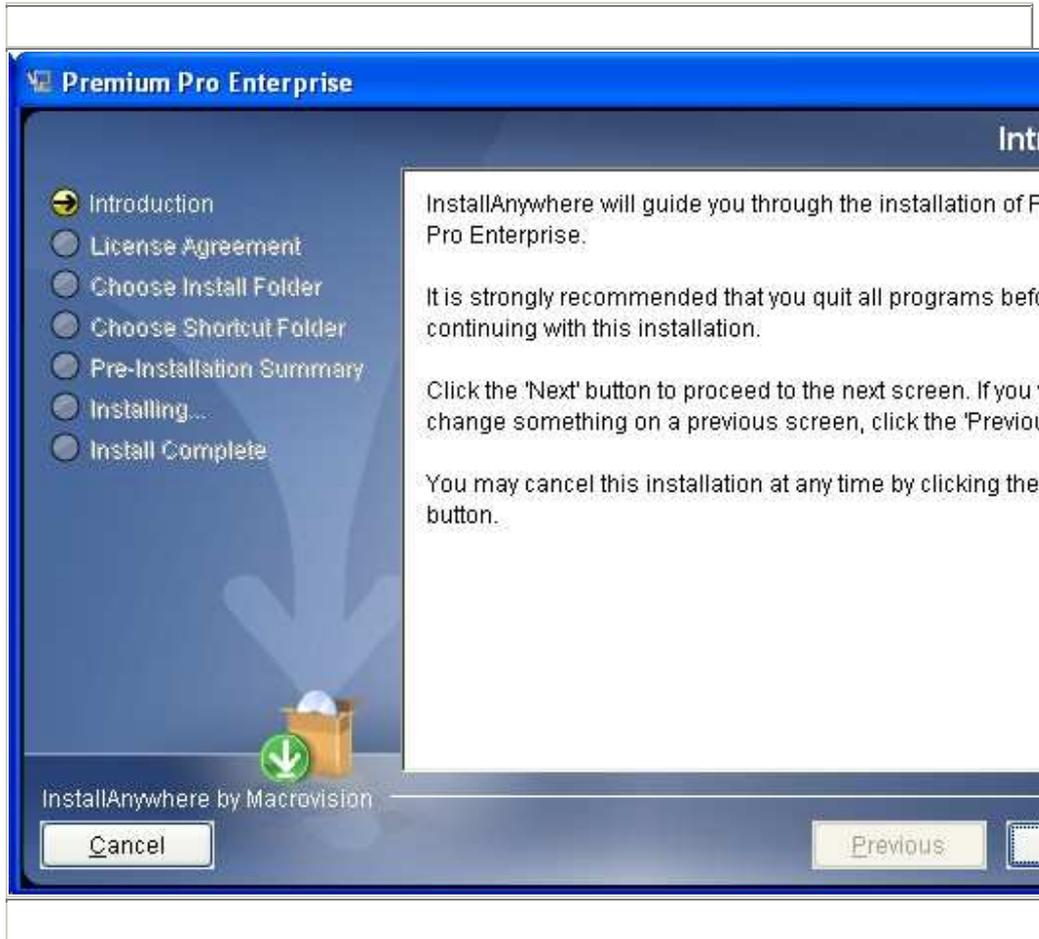
<http://enterprise.tritechsoft.com/installs/>

Click on the hyperlink for PremiumProEnterpriseInstallation.exe.

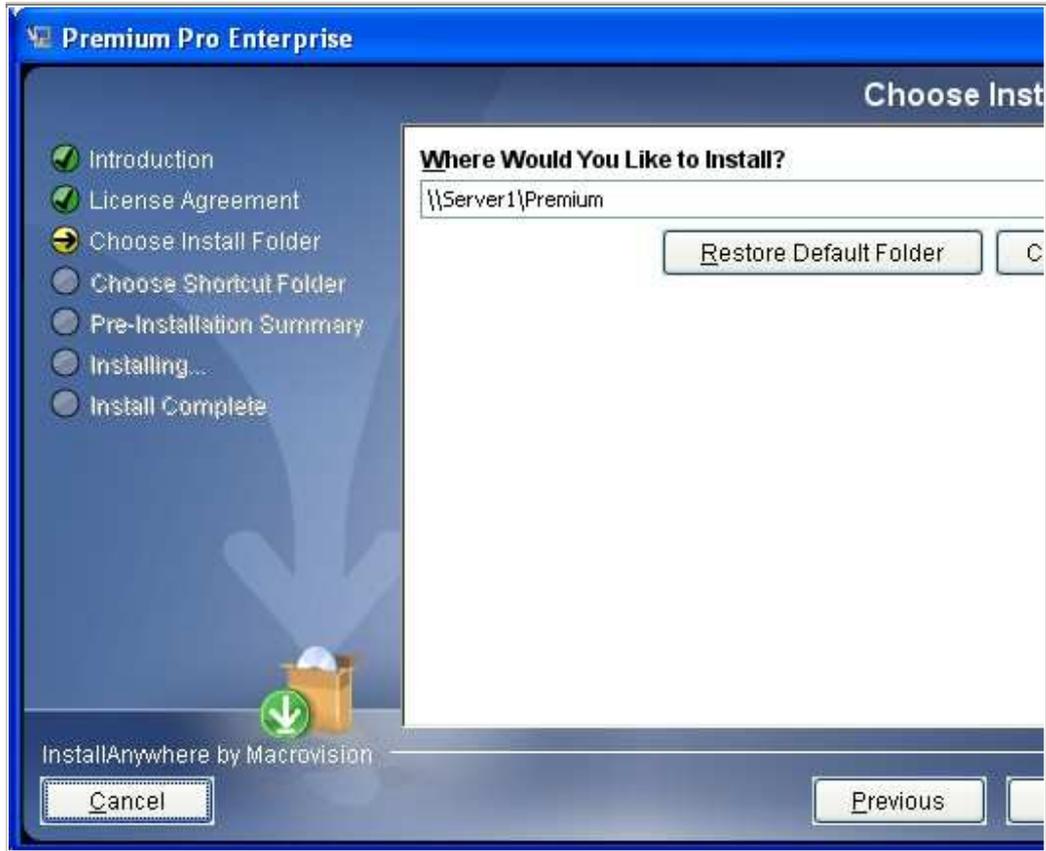
1. Click run to download the file and install it. Otherwise, click **Save** and you may installed the program at a later time.



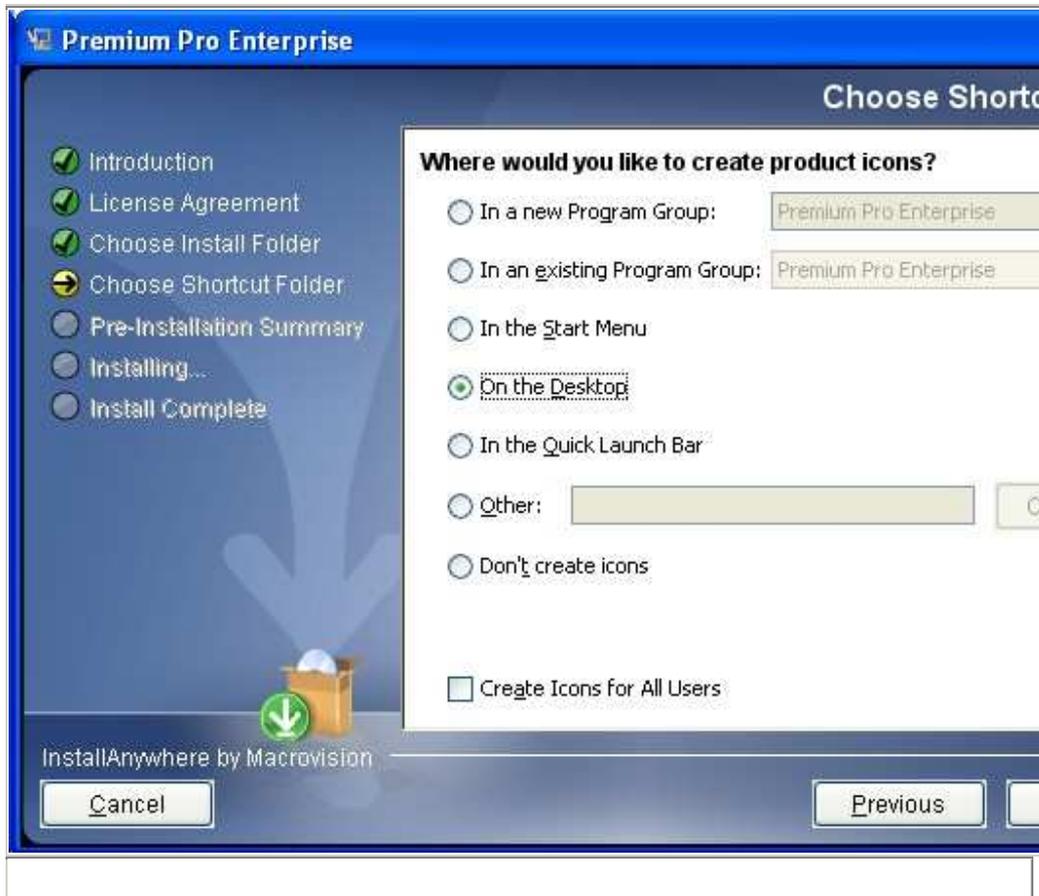
2. The installation program will start. Click **Next**. Accept the license agreement and click **Next**.



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").



- 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**.

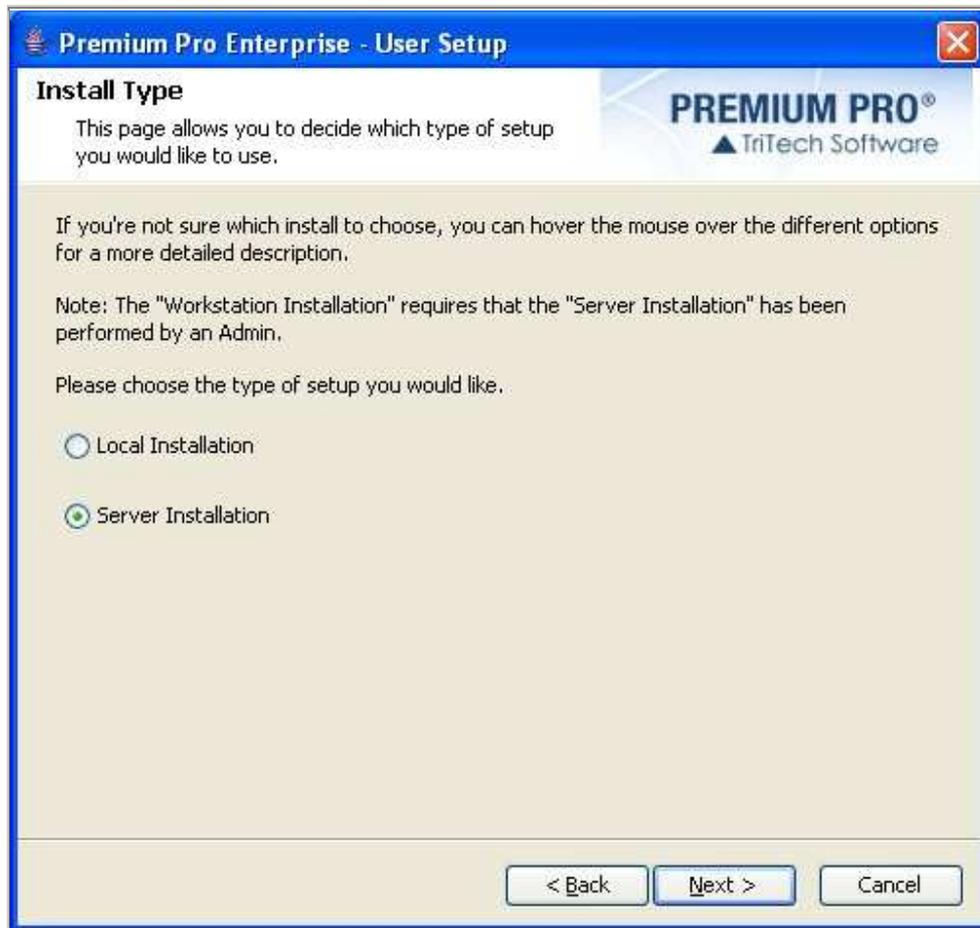


- Review the Pre-Installation Summary to insure your selections are correct. Click **Install** to proceed. The installation will install a self contained version of Java Runtime Environment (JRE). JRE is self-contained in this folder so that it will not affect any other programs you use that require 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 SQL Server databases 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 **Microsoft SQL Server** and enter the appropriate information needed to connect to your network database. Please see Chapter 2 for more detailed information.

If you installed SQL Server using a named instance, please check the box for **Used Named Instance** and enter the Instance Name rather than the port number.

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: Tr1t3ch2

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

**Premium Pro Enterprise - User Setup**

**Network Server Setup**  
Please enter name of the network server that is running the database.

PREMIUM PRO®  
▲ TriTech Software

Select the type of database.

IBM Cloudscape / Apache Derby  
 Microsoft SQL Server

Host: TriTechServer  
Port: 1527

Use Named Instance:  
Instance Name: \_\_\_\_\_

User ID: tritech  
Password: ●●●●●●

Test Server

**Connection Successful.**

< Back   Next >   Cancel

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 SQL Server, 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](http://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](http://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](http://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)	contents of details.xml	
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.

### **SQL Server Access**

PPE stores the user's data in a database. One of the compatible databases for PPE is Microsoft SQL Server. In order to use PPE with Microsoft SQL Server, the computer on which Premium Pro Enterprise is executed (typically, the user's desktop PC), must be able to connect to the appropriate port on the SQL Server; for standard installations this is port 1433. PPE authenticates with the SQL Server using SQL Server Authentication; Windows (NT) Authentication is **not** supported.

For desktop workstation installations, all PPE users connect to the SQL Server via a single SQL Server Login. For normal application usage, it is sufficient that this Login have permissions to "INSERT INTO" and "UPDATE" values in the Enterprise databases.

Occasionally, as part of the update process, changes are made to the database tables. In order for this to work, the SQL Server Login used by Enterprise must have permissions to perform "CREATE TABLE" and "ALTER TABLE" commands within the Enterprise Databases. When a new product is released via the PPE update center (e.g. Premium, Municipal, FormsPlus) it requires the creation of a new database. This will occur automatically if the SQL Server Login used by Enterprise has permissions to create databases. This is best achieved by granting "CREATE ANY DATABASE" permissions to this SQL Server Login.

If you chose not to allow permissions to "CREATE TABLE" and "ALTER TABLE", you must request a SQL Script from TriTech. The SQL database administrator will to run the script to create tables before the new product is downloaded from the update center.

## Chapter 5: Workstation Installation

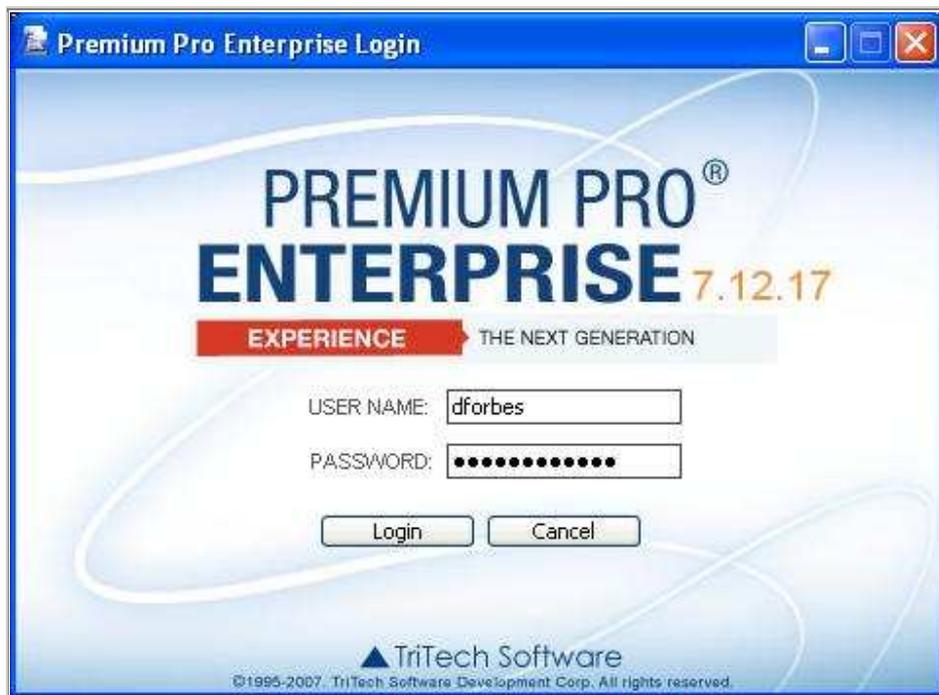
1. Create a shortcut on the user's PC desktop. The target you select should be identical to the path you selected for the Premium Pro Enterprise installation (See Chapter 3 step 3), followed by "Enterprise.exe". You can use a mapped drive or UNC path.

Example:

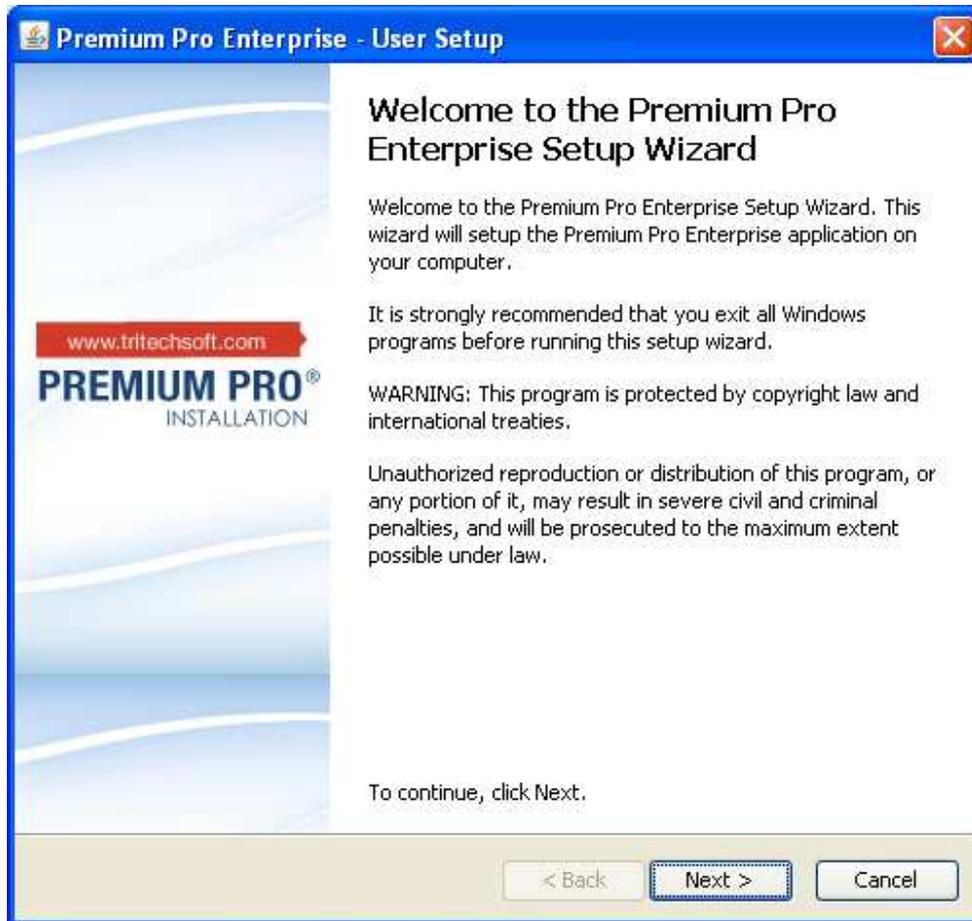
\\ServerA\Premium Pro Enterprise\Enterprise.exe

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.

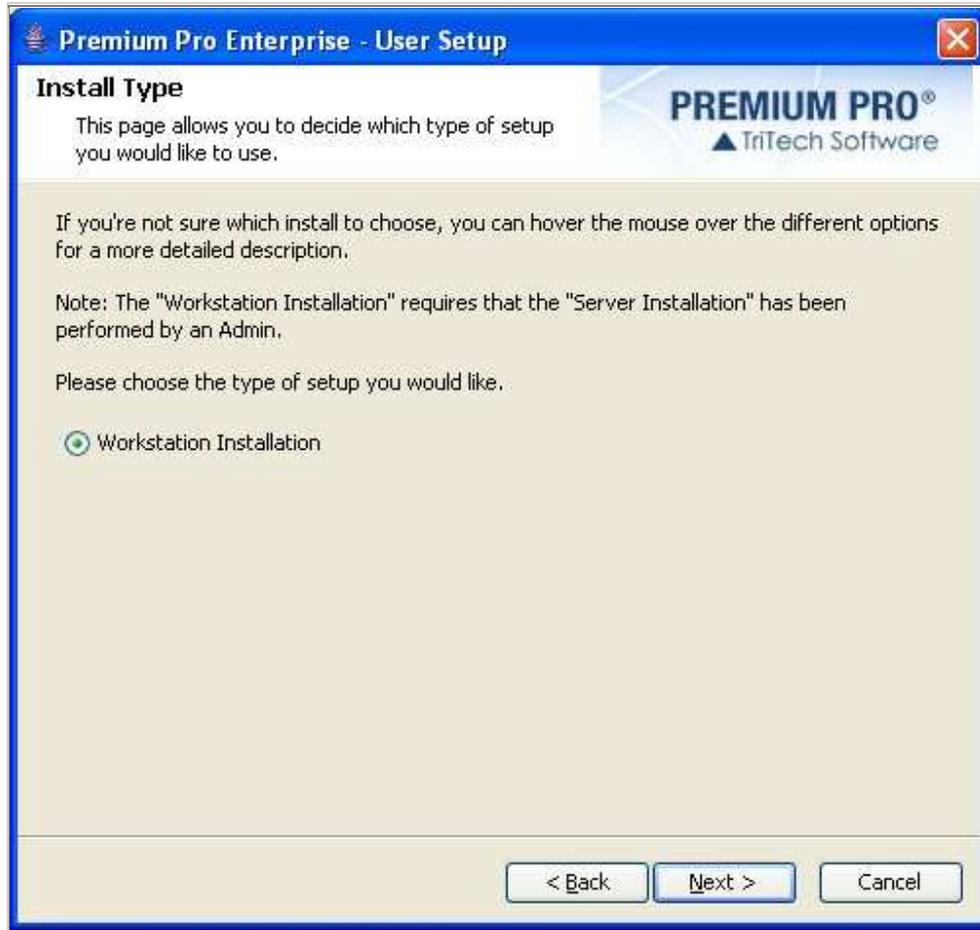


3. The Enterprise Setup Wizard will launch. Click **Next**. Accept the license agreement and click **Next**.



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 TABLE and ALTER TABLE in the SQL Server database created (Chapter 2 and Chapter 4)

If the administrative user is not given rights to create and alter tables in the database, the SQL DBA must run a script at the beginning of each product year to add necessary tables. The script is available upon request.

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)

## SQL Database Configuration for Enterprise

- Only SQL Server Authentication is supported. Mixed Authentication must be enabled.
- A single login is created (by default USER ID is called "tritech" and the password is "Tr1t3ch2", but can be set by user). The password must conform to the requirements of the SQL Server.
- Four databases are created
  - Common\_P2EE
  - Premium\_P2EE
  - Muni\_P2EE
  - Mfp\_P2EE

- A User is created in each database for single login (by default, name is same as login name). User has db\_owner role (this gives full permissions within database).

- The SQL Server cannot use case sensitive collation

Minimum permissions required for Enterprise use are:

- Database user permission - SELECT, INSERT, UPDATE, DELETE
- Database user role - db\_datareader and db\_datawriter
- Minimum permissions required for database changes (administrative user)
  - Table Changes
    - Database user permission
    - ALTER
  - New Database when adding a product
    - login permission (server level)
    - CREATE ANY DATABASE

### **Other Database Considerations**

- TCP/IP is the network protocol used for SQL server connection.
- Security model of the database and the application: Enterprise uses single user ID, the username and password are encrypted and stored in the configuration file. User password is not embedded in the database.
- The database does not use full text search, SSIS, SSAS, SSRS, Notification Services, or External Stored Procedures.
- Windows NT Authentication is not supported.

### **Firewall / Proxy Server Considerations**

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