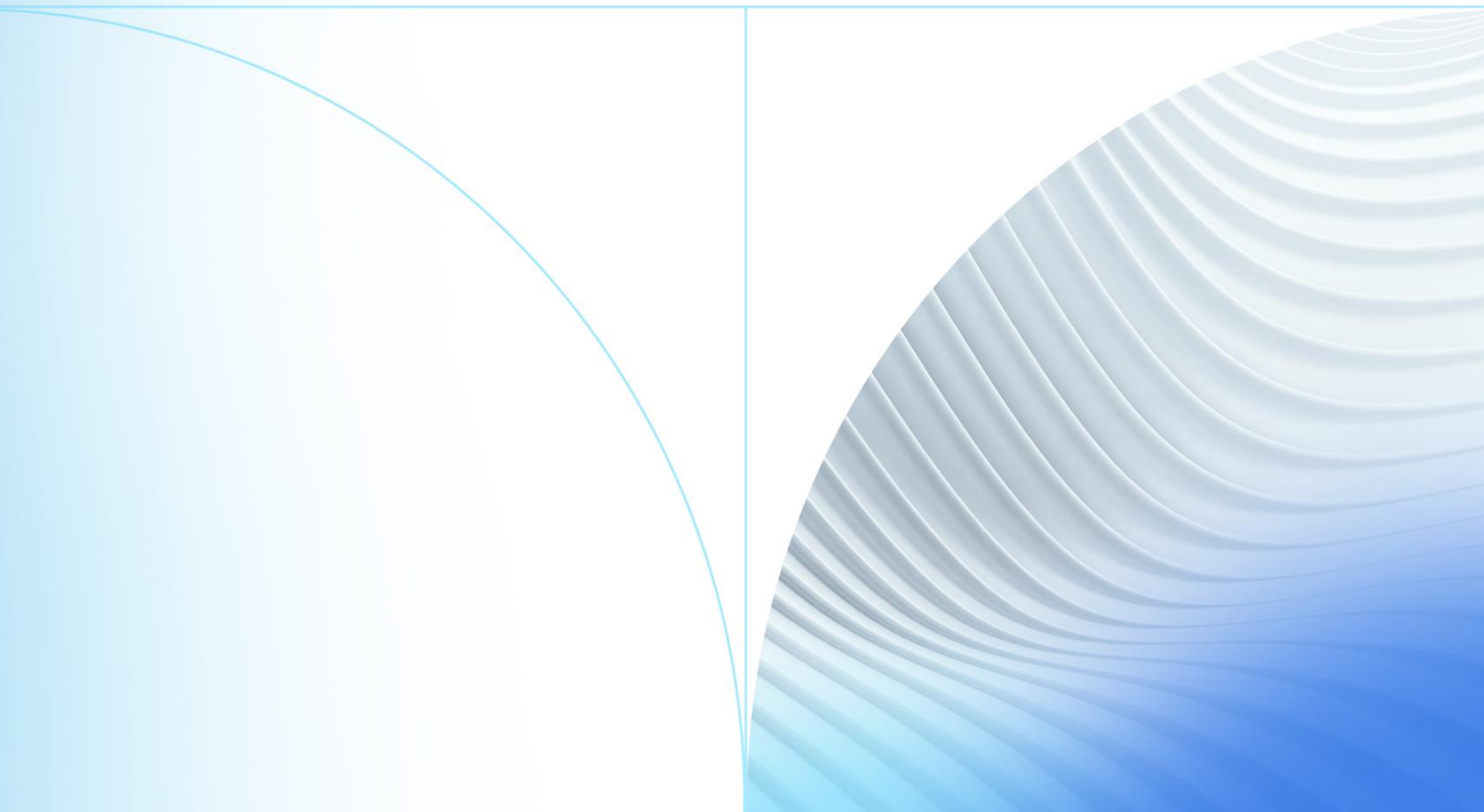# jack henry™

Financial Performance

PROFITstar, PROFITability, PROFITstar Suite, and PROFITstar Portfolio

Release 2018

Installation Guide

For Clients Installing the First Time

Before You Begin

Introduction

This document contains detailed instructions for users who are installing the PROFITstar software for the first time.

NOTE Other installation guides are available.

- If you are moving from any version of 2012 to 2018, which requires a conversion of the 2012 data, refer to the instructions found at: http://profitstarhelp.jackhenry.com/dev/2018DataConversionInstall.pdf

- If you are currently running on a previous version of 2014 through 2017 and want to upgrade to 2018, refer to the instructions found at: http://profitstarhelp.jackhenry.com/dev/2018NoConversionInstall.pdf

PROFITstar utilizes a three-part architecture comprised of the SQL Server, the Profitstar Server, and the Profitstar Client. We provide the installers for the Profitstar Server and Client, but do not install the SQL Server.

- **SQL Server** – It is expected that the PROFITstar program will have a SQL Server instance on a server machine that meets the defined SQL Server machine requirements.

   During the Profitstar Server installation the program will verify whether an instance of SQL Server is already installed on the targeted server. If not, the installer will add a few steps to determine if it should install SQL Express.

   > **TIP** If your institution will be using SQL Express, you should also download and install SQL Server Management Studio (SSMS), from:
   >
   > https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017
   >
   > This is a separate and free software installation. SSMS 17.x will work with any older versions of SQL Server and is useful for problem solving and other purposes.

- **Profitstar Server** – This software can, but does not need to be, installed on the same server machine as the SQL Server.

- **Profitstar Client** – The Profitstar Client installation is run on each PC used to access PROFITstar data.

Remember that for all types of installations, the person actually installing the software must have Administrator rights and the user used to connect to the targeted SQL server must be a member of the **sysadmin** role (just for installation-related processes).

"PROFITstar" is used throughout this guide as a generic name for the family of products that includes PROFITstar, PROFITability, and Profitstar Suite.

System Requirements

The server and client machines, on which the Profitstar Server and Client applications will be installed, need to meet the requirements defined in the 2018 System Requirements document, which can be found at:

http://profitstarhelp.jackhenry.com/dev/CurrentSysReq.pdf

Things to Be Aware of Before Beginning

When is the sysadmin Server Role required?

When installing the software, the user used to connect to the targeted SQL server must be a member of the **sysadmin** role.

When the installations are complete and users can connect to the database from their client machines, then the server role can be reverted to **public**—until the next time that an installation is necessary.

What Database-Level Role is necessary to run the software?

The user used by the Profitstar service must be a member of the **db_owner** role.

What Are the Hardware Sizing Recommendations for 2018?

Significantly improved performance may be achieved by following our new hardware recommendations:

http://profitstarhelp.jackhenry.com/dev/HardwareRecommendations.pdf

Additional Technical Resources

Refer to the Appendix for links to the most recent System Requirements and Installation Guides.

First Time PROFITstar Installation Checklist

1. Review the system requirements and the installation prerequisites.

2. Locate your product key.

3. Download the latest 2018 installation files from the For Clients portal (*Tools/Administration > JHA Downloads*).

PROFITstar ALM/Budgeting	
Last Downloaded	File
NEW	☐ 2018.___ ProfitstarClient.exe
NEW	☐ 2018.___ ProfitstarServer.exe

4. Verify that the institution has a SQL Server instance already installed, on a server machine that meets the defined SQL Server machine requirements, before proceeding with the Profitstar Server and Client installations.

5. Make sure that the user used to connect to the targeted SQL server is a member of the **sysadmin** role (just for installation-related processes). In addition, the person running the Profitstar installations must have Administrator rights.

6. Install the 2018 Profitstar Server on your server.

7. Restore the supplied SQL backup.

8. Add the necessary content to the Configuration.xml file.

9. Install the 2018 Profitstar Client on your server/work stations.

10. Downgrade the server role to **public**.

11. Confirm that users can connect to the database from their client machines.

Server Prerequisites

Microsoft® SQL Server® Prerequisites

It is expected that the PROFITstar program will have a SQL Server instance on a server machine that meets the defined SQL Server machine requirements.

During the Profitstar Server installation the program will verify whether an instance of SQL Server is already installed on the targeted server. If not, the installer will add several steps to determine if it should install SQL Express.

> **TIP** If your institution will be using SQL Express, you should also download and install SQL Server Management Studio (SSMS), from:
>
> https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017
>
> This is a separate and free software installation. SSMS 17.x will work with any older versions of SQL Server and is useful for problem solving and other purposes.

If the institution needs to obtain SQL Server licenses, the ProfitStars Sales team can provide this software at a competitive price.

Once SQL Server is installed, the following SQL Server Services are required and must be set to start automatically:

- Database Engine
- SQL Server Browser

SQL Server & Profitstar Server on Different Machines

LANs

The Profitstar Server and the SQL Server can be installed on different machines. If this is done, both machines should still be on the same Local Area Network.

New Login Name

In addition, before running the Profitstar Server Installation, it is necessary to create a new login on the SQL Server (*Security > New > Login*).

When creating this login, the name of the server on which the Profitstar Service will reside is used as the **Login name**.

Standard naming conventions are used: **Domain name \ Server name**, followed by the **$** symbol. Using the **Search** button is not recommended since the appropriate server may not appear in the Active Directory.
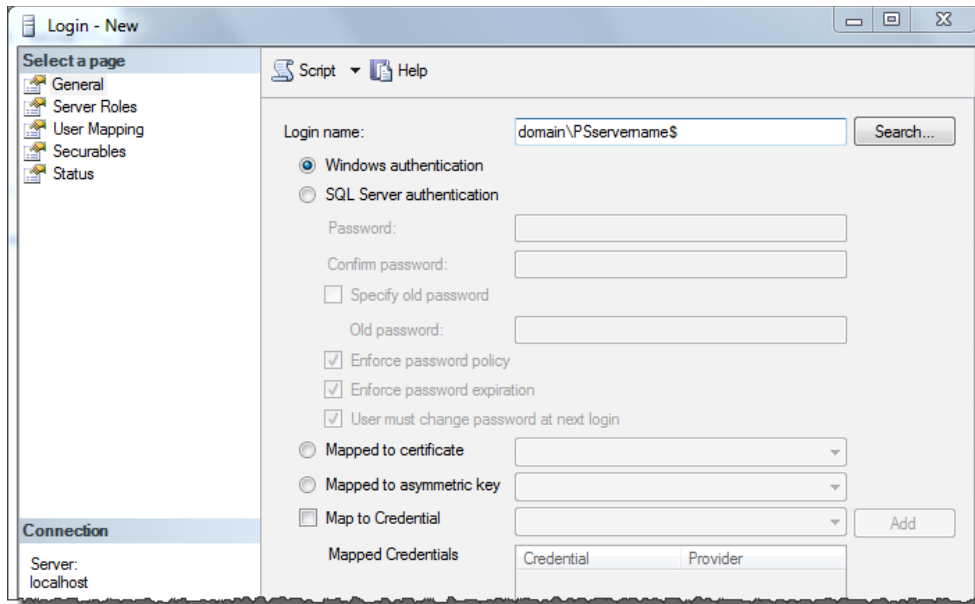
This login name also needs to be assigned the **public** Server Role.
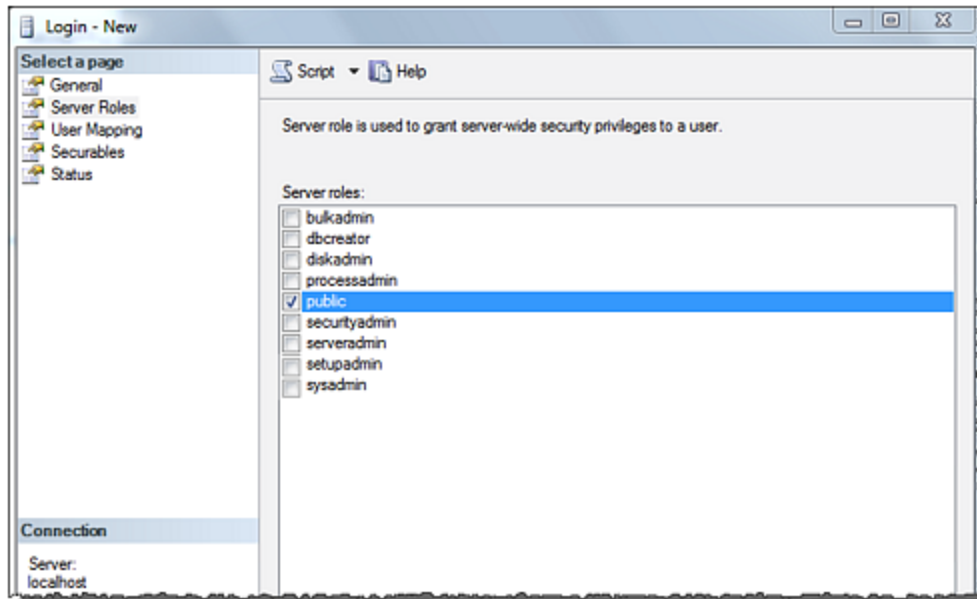
Creating a new login name with these settings gives the Profitstar Service authority to access the SQL Server.

SQL Server & Profitstar Server on the <u>Same Machine</u>

Built in Login

When the SQL Server and Profitstar Server reside on the same machine, the NT AUTHORITY\SYSTEM login needs to be assigned the **public** Server Role.
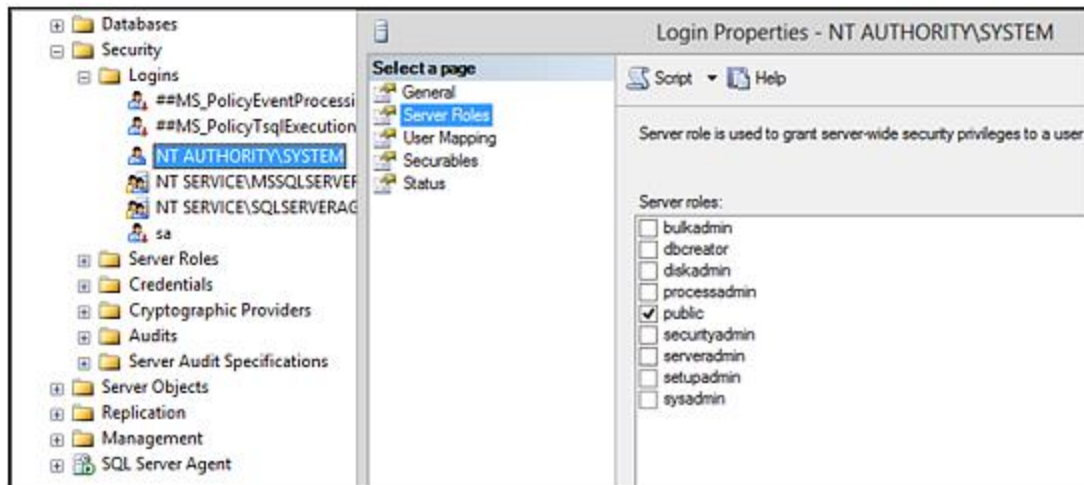
Memory Usage

The default configuration for SQL Server is to use all the memory on the server machine. However, if the PS Service is running on the same machine as SQL Server, it is recommended that the maximum server memory value be set to half the available memory.

For example, if the machine has 8 GB of memory, set it to 4096 (4 GB); or, if it has 4 GB of memory, set it to 2048 (2 GB).

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WANs and LANs

- **Recommendations concerning WANs and LANs** – WAN environments are not supported. For best performance, the Profitstar Server should be housed on the same Local Area Network as the Profitstar Client machines.

- **Cloud/Hosted SQL Servers** – Cloud/Hosted SQL servers are not supported. For best performance, a Local Area Network is the best solution.

Additional Server-Related Issues

The Profitstar Server must be installed on a PC that meets the defined Profitstar Server machine requirements. The Profitstar Server service relieves the client PCs of some of the heavier data processing duties. Be aware of the following:

- **Person Installing the Software Needs Administrator Rights** – Since the installation programs for the Profitstar Server and Profitstar Client perform admin functions, it is required that the person installing the software have Administrator rights.

- **The Server Install Needs to be Performed on the Profitstar Service Machine** – Remote installation of the Profitstar Server is not permitted (e.g., via a network or mapped drive).

- **All Client PCs Must Have a Way to Connect to the Server Machines** – The use of PROFITstar with a "single-user license," for PCs that are not always physically connected to the corporate network, is not supported. The Profitstar Server component must be installed on a server machine running one of the approved Windows Server operating systems and client PCs will need to have a way to connect to it: via a Local Area Network, VPN, or a Remote Desktop connection.

- **Non-Windows Operating Systems** – Non-Windows operating systems—such as Novell Netware and Linux—are not supported.

Other Prerequisites

Microsoft® .NET Framework, Version 4.5

Microsoft .NET Framework, version 4.5, must be installed on the computers that will run the Profitstar Server and Profitstar Client programs. The .NET software is not required for the SQL Server machine, if it is on a separate computer.

If .NET Framework, version 4.5, files are not detected on a machine being targeted by the Profitstar Server or Profitstar Client installations, the program will attempt to download the necessary files from Microsoft's website.

If any of the server or client machines do not allow a connection to the internet, the .NET Framework files will need to be downloaded on another PC and then manually installed on the appropriate machines.

The .NET Framework files are available on the Microsoft website and can be downloaded from the following URL:

http://www.microsoft.com/en-us/download/details.aspx?id=30653

Configuring Firewall Software

If firewall software is used to protect the server machine, it must be configured to allow incoming connections on ports **20925** and **20927**, using the **TCP** protocol. The Profitstar Server utilizes these ports to satisfy and manage client requests for data used by PROFITstar and its related software products.

Other Firewall Considerations for Client PCs

Certain actions in PROFITstar require access to specific ports and URLs. You may need to add this information to your firewall filter lists:

- **Downloading the current month's Key Rates** – PROFITstar uses port **80**, with the **TCP** protocol. URL: http://profitstarhelp.jackhenry.com/keyrates/keyrates.prn

- **Checking for Updates** – PROFITstar uses port **80**, with the **TCP** protocol. URL:http://profitstarhelp.jackhenry.com/dev/CurrentVersion.txt

- **Downloading the current month's CECL rates** – CECL uses https, which is usually port **443**. URL: https://prod.profitstarsfps.com

- **Using Cloud Email** – URL: https://www.profitstarbudgetmanager.com/

- **Connecting to Budget Manger** – During the Budget Manager Export or Import processes, PROFITstar uses port **80** (http:) for text and **443** (https:) for secure connections. URL: https://www.profitstarbudgetmanager.com/

  In addition, institutions that utilize a proxy server and integrated authentication may have to add a rule on their proxy server to allow the PS.exe and PA.exe files to connect to the Budget Manager URL.

Preliminary Installation Steps

New clients, installing the PROFITstar, PROFITability, or Profitstar Suite programs for the first time, should perform the following steps.

Preliminary Steps (1 – 5)

1. **Introduction**

   Review the PROFITstar 2018 [installation checklist](#).

   The Profitstar Server needs to be installed on a server that meets the defined Profitstar Server machine requirements, while the Profitstar Client installation must be run on each PC used to access PROFITstar data.

2. **Verify the System Requirements**

   Review the system requirements and verify that the computers on which the software will be installed meet these requirements.

   The 2018 System Requirements document can be found at:

   http://profitstarhelp.jackhenry.com/dev/CurrentSysReq.pdf

3. **Locate your Product Key**

   You will need a Product Key to unlock the products that your institution is licensed to install.

   The Product Key is entered in the first step of the Profitstar Client Installer. (Step [13](#)) If you do not have this institution-specific information, please contact your client services analyst at 800-356-9099.

4. **Installation Rights**

   The person installing the Profitstar Server service must have Administrator rights.

5. **Installing from Downloaded Files**

   Download the latest 2018 installation files from the For Clients portal (*Tools/Administration > JHA Downloads*).

PROFITstar ALM/Budgeting	
Last Downloaded	File
NEW	☐ 2018. ProfitstarClient.exe
NEW	☐ 2018. ProfitstarServer.exe

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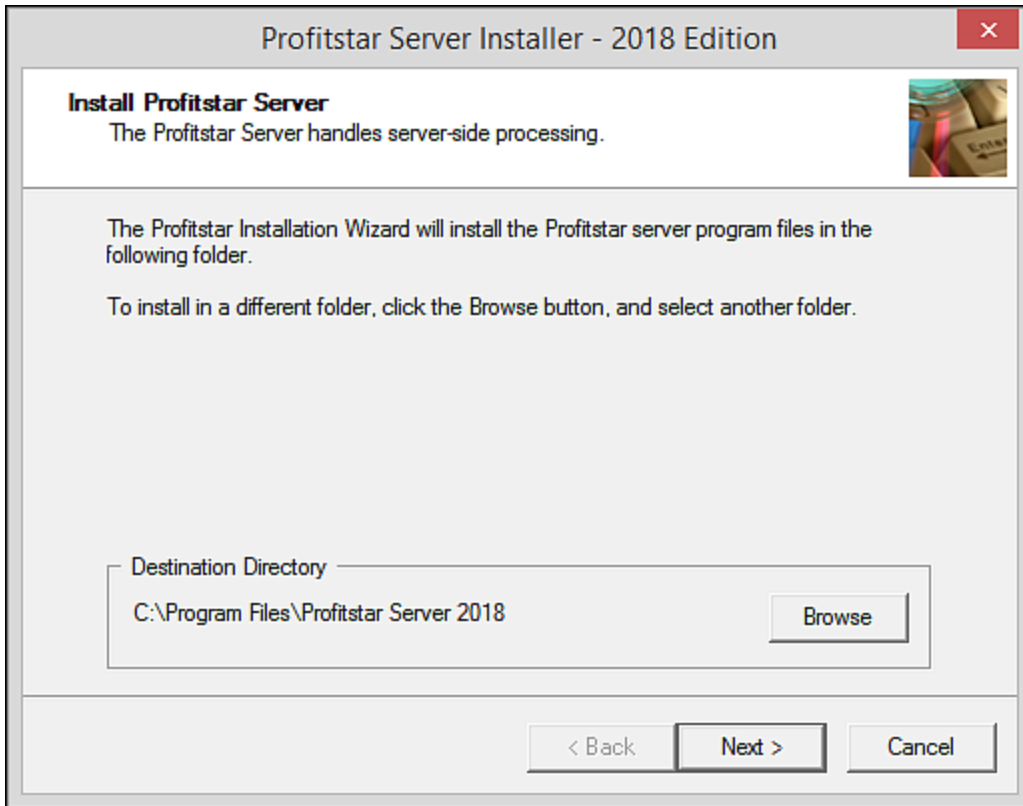# Profitstar Server Installation

Steps 6 – 9

6. **Install Profitstar Server**

   When installing from a downloaded file, use the *2018.xx ProfitstarServer.exe* file to launch the server installation.

   Before beginning the installation, remember that:

   o The user used to run the server and client installations must be a member of the **sysadmin** role on the SQL Server instance dedicated to Profitstar. When the installations are complete, the server role can be reverted to **public**.

   o The person installing the software needs [Administrator rights](#).

   o [Remote installation](#) of the Profitstar Server is not permitted.

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                                                                              PROFITstar Portfolio   Release 2018

Specify a path for the Profitstar Server installation.

For performance reasons, the Profitstar Server and the SQL Server may be installed on different machines.

7. **SQL Express**

During the Profitstar Server installation, the program will determine if an instance of SQL Server is already installed on the targeted server. If it is, the installer will progress to the screen shown in Step 8. If not, the installer will display two statements.

Select the statements that are true for your institution.

The installation completed successfully.

☐ You have fewer than 30 organizations.

☐ You have less than $1 billion in assets.

If you select both, then additional information is displayed.

The installation completed successfully.

☑ You have fewer than 30 organizations.

☑ You have less than $1 billion in assets.

Your asset size and number of orgs qualify you to use a free database server from Microsoft called SQL Express, instead of SQL Server Enterprise. If you would like to use it, and have us intstall it for you click the box below!

☐ Install SQL Express.

Select the **Install SQL Express** check box if you want to proceed with the SQL Express installation. When you click **Next** at the bottom of the page, the SQL Express installation will run, without any intervention required.

The SQL Express installer installs a database engine that supports up to 10 GB per database.

> **TIP** If your institution will be using SQL Express, you should also download and install SQL Server Management Studio (SSMS), from:
>
> https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017
>
> This is a separate and free software installation. SSMS 17.x will work with any older versions of SQL Server and is useful for problem solving and other purposes.

8. **Server Components Installed**

   Following the installation of the Profitstar server, you will see a completion message.
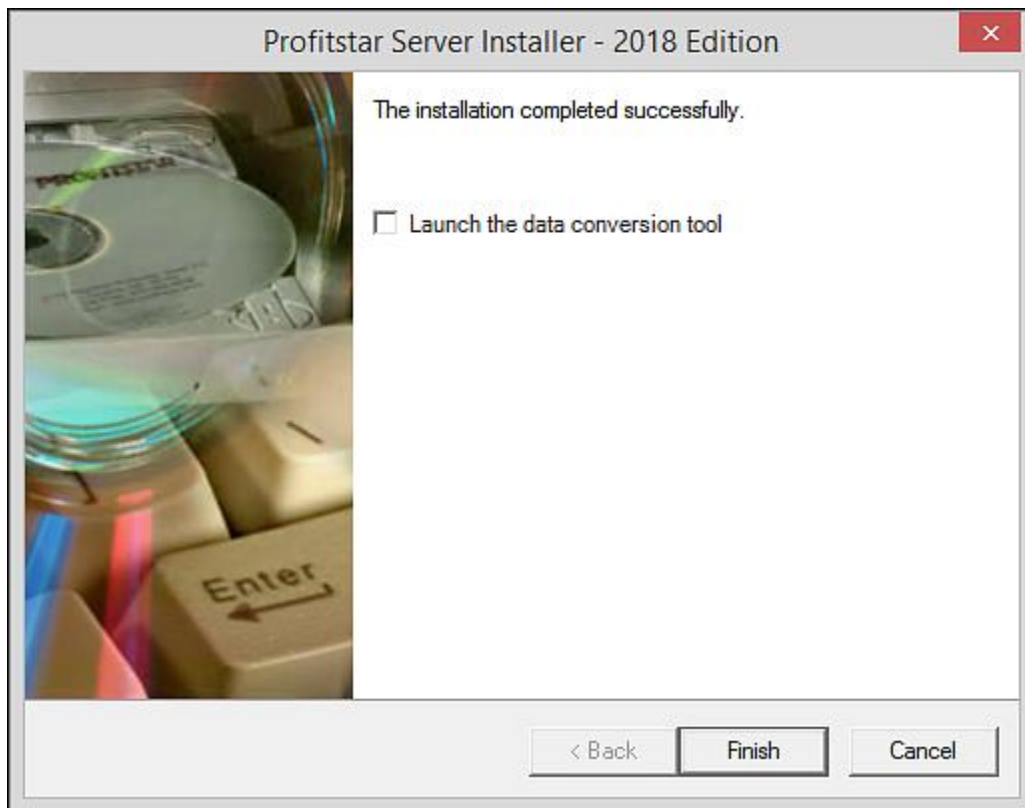
When installing the program for the first time, you can ignore the **Launch the data conversion tool** check box. (Make sure the check box is cleared.) Click the **Finish** button.

9. **Optimizer Considerations**

   For institutions that will be publishing PROFITstar/PROFITability data to the Optimizer product:

   o The Profitstar Web Services for Optimizer web application may be installed on the same server that is running the Profitstar Server service, or on a separate server.

   o While the Profitstar Web Services component must be kept in sync with the current Profitstar Server version, the Profitstar Web Services for Optimizer installation may be run before or after the Profitstar Server installation.

Restoring the SQL Backup and Editing Configuration.xml

Steps 10 – 11

10. Restore Supplied SQL Backup

At this point in the installation process, the SQL backup file, provided by Client Services, should be restored using SQL Management Studio.
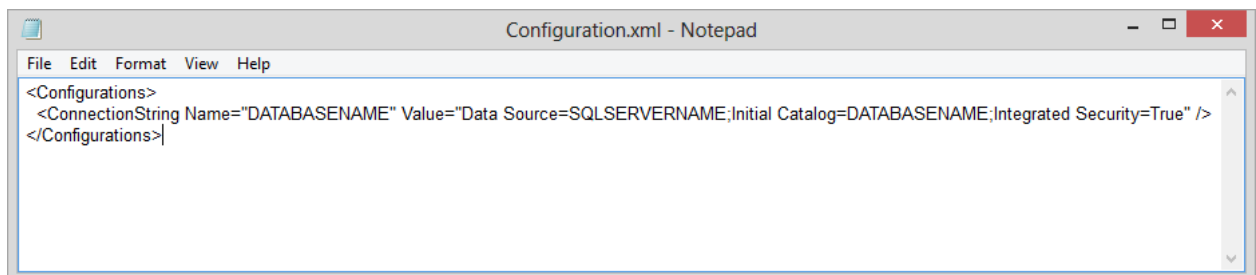
11. Add the Necessary Content to the Configuration.xml File

After restoring the SQL Server backup, it is necessary to add specific content to the sample **Configuration.xml** file, which is also provided by Client Services.

The file should be copied to the following location, on the machine where the Profitstar Service resides:

C:\ProgramData\Profitstar\DataTier\Configuration.xml

When the file is opened in an editor, such as Notepad, it should look like this:

a. In your editor, replace these elements:

DATABASENAME – In two places, use the name assigned to the new SQL Server database. No spaces are allowed in this name.

SQLSERVERNAME – Use the name of machine hosting the SQL Server.

b. Save the file and close the editor.

c. Restart the Profitstar Server service.
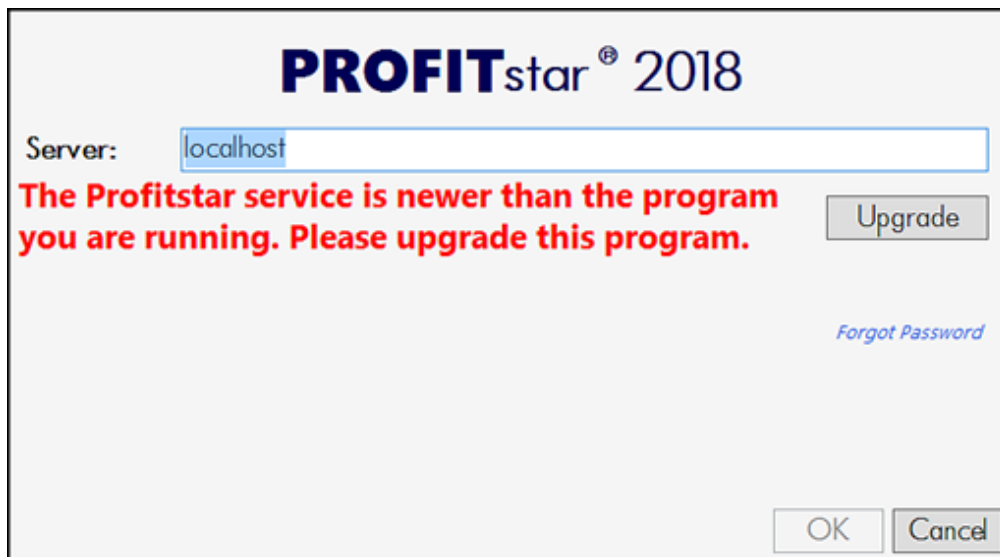
Client Installation

Steps 12 – 15

12. Client Installation

The client installation should be run when:

- o You are currently installing to the Profitstar Server machine and PROFITstar will be run on this PC.

- o You are installing the program files for PROFITstar on each PC that will be used to access the data.

When installing from a downloaded file, use the *2018.xx ProfitstarClient.exe* file to launch the client installation.

NOTE After the first installation of the Profitstar Client programs on a client PC, users will subsequently be able to perform upgrades from their Login screens, whenever the Profitstar Server is upgraded.
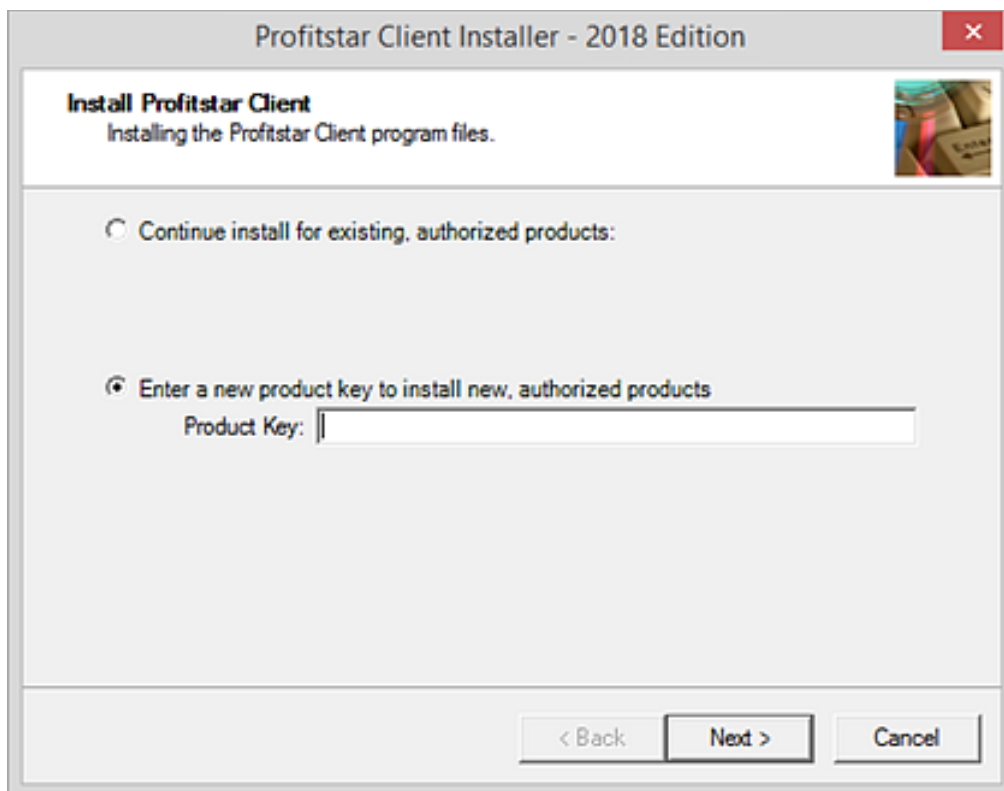
13. Install Profitstar Client (1)

Remember that for all types of installations, the person installing the software must have Administrator rights.

For new installations, you will need to enter your institution's Product Key in the Product Key box. The key controls which program files will be installed on the current computer.

If you do not have this institution-specific information, please contact your client services analyst at 800-356-9099.
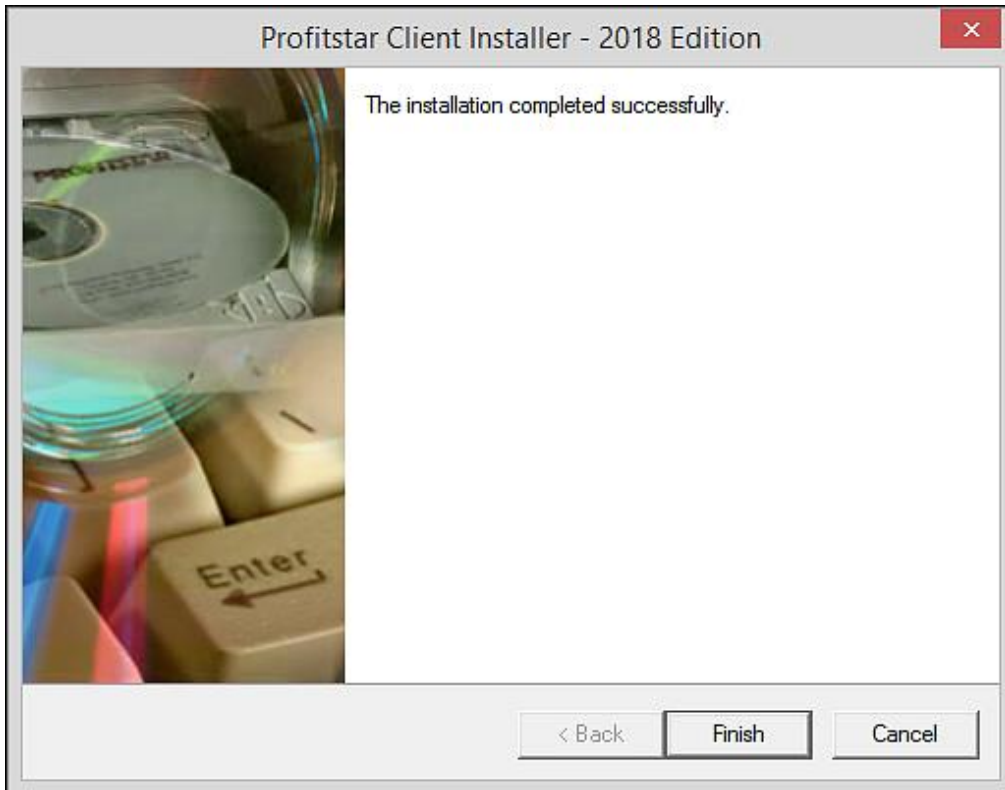
14. Install Profitstar Client (2)

The **Destination Directory**, shown at the bottom of the screen, can be modified by clicking the **Browse** button and selecting a different folder.
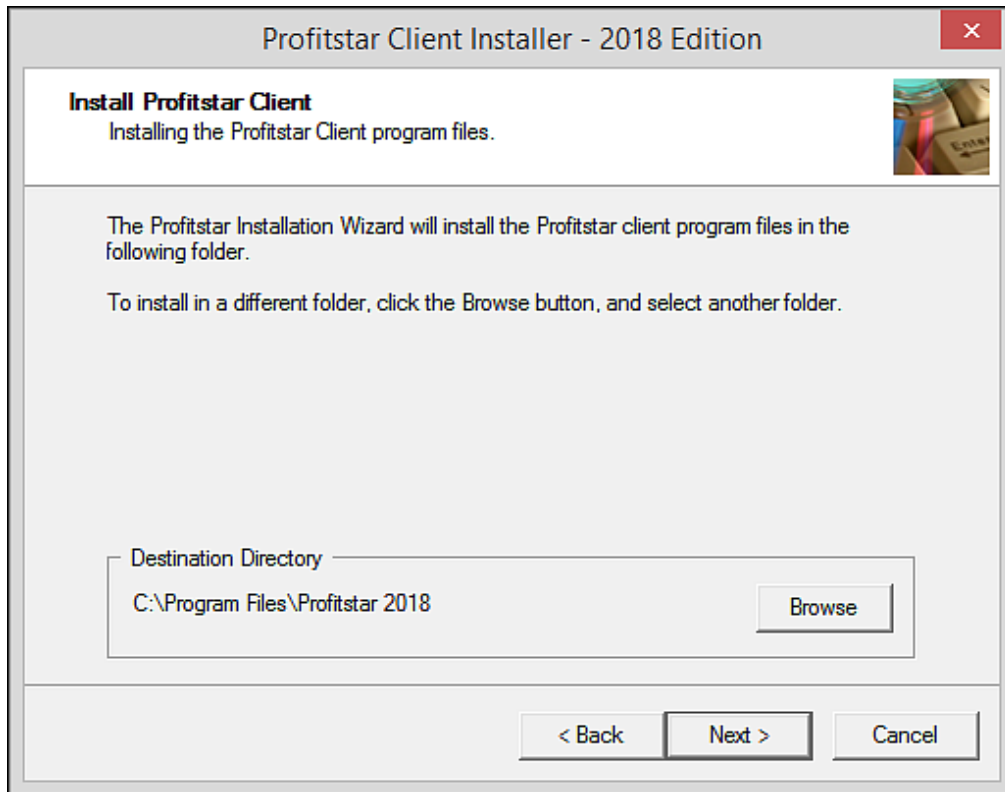
15. Client Components Installed

Following the installation of the Profitstar Client components, you will see a completion message. Click the **Finish** button.

Final Considerations

Logging into PROFITstar

When the Profitstar Client and Server installations are complete, users will be ready to log into the program.

Depending on the programs installed on a user's PC, either the **ps.exe** (for PROFITstar) or the **pa.exe** (for PROFITability) file, found in the **Profitstar 2018** folder, can be used to open the Login screen. PROFITstar and/or PROFITability shortcuts can also be found in the Windows Start menu.

When the Login screen appears, the following information needs to be entered:

- **Server** – This is the Profitstar Server computer name, which may or may not be the same as the SQL Server computer name.

  NOTE A Fully Qualified Domain Name or IP address may also be used in the Server field.

- **Database** – The name of the Profitstar database is entered here.

- **User name** – Enter the initial User name provided by your client services analyst.

- **Password** – If a password is associated with the user, it is entered here.

Once a user has successfully logged into PROFITstar or PROFITability, the Login screen will remember the Server, Database, and User Name information the next time the user launches the program on the same PC.

Appendix – Related Links

PROFITstar, PROFITability, Profitstar Suite, & PROFITstar Portfolio

The most current version of these installation instructions

http://profitstarhelp.jackhenry.com/dev/2018NewInstall.pdf

Complete installation instructions containing 2012 data conversion information

http://profitstarhelp.jackhenry.com/dev/2018DataConversionInstall.pdf

Installation instructions for existing 2014 and later clients

http://profitstarhelp.jackhenry.com/dev/2018NoConversionInstall.pdf

System requirements

http://profitstarhelp.jackhenry.com/dev/CurrentSysReq.pdf

Hardware recommendations

http://profitstarhelp.jackhenry.com/dev/HardwareRecommendations.pdf

Release notes

http://profitstarhelp.jackhenry.com/dev/2018ReleaseNotes.pdf

PROFITstar's Hosted Budget Manager

System requirements

http://profitstarhelp.jackhenry.com/dev/CurrentBudgetManagerSysReq.pdf

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                                                         PROFITstar Portfolio   Release 2018