



**Financial Performance**

PROFITstar, PROFITability, PROFITstar  
Suite, and PROFITstar Portfolio

Release 2018

# **Installation Guide**

For Clients Upgrading from 2014 and Later Versions

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# Before You Begin

## Introduction

This document contains detailed installation instructions for upgrading to 2018 from any prior version of PROFITstar 2014 and later.

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 installing PROFITstar for the very first time, refer to the instructions found at <http://profitstarhelp.jackhenry.com/dev/2018NewInstall.pdf>.

**NOTE** 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.

## Important Considerations

### 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 the 2018 Installation

### When is the sysadmin Server Role required?

When installing new versions of the software or upgrading the program on client machines, the user used to connect to the targeted SQL server must be a member of the **sysadmin** role.

When such installations or upgrades 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 and upgrade 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?

Significantly improved performance may be achieved by following our 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.

## Prior SQL Version to PROFITstar 2018 Installation Checklist

1. Review the [system requirements](#) and the installation prerequisites.
2. Locate your [product key](#), if necessary.
3. Download the latest 2018 installation files from the [For Clients](#) portal (*Tools/Administration > JHA Downloads*).

PROFITstar ALM/Budgeting	
Last Downloaded	File
NEW	<input type="checkbox"/> 2018. ProfitstarClient.exe
NEW	<input type="checkbox"/> 2018. ProfitstarServer.exe

4. Ensure all end users are out of PROFITstar and the program is closed before performing this upgrade.
5. Stop the PS Service.
6. 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.
7. Install the 2018 Profitstar Server on your server.
8. Install the 2018 Profitstar Client on your server/work stations.
9. Restart the PS Service.
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

The instructions in this document assume that you are already running on a properly configured SQL Server version of PROFITstar. If more detailed SQL Server information is needed, refer to the guide found at:

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

### 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.
- **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).

- **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.

## Clients on a Prior SQL Version – Upgrading to 2018

Existing 2014 through 2018 clients, installing the latest version of the PROFITstar, PROFITability, or Profitstar Suite programs, 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

If you will be installing 2018 on the same client PCs that were previously used to run PROFITstar and if there have been no changes to the institution's licensed products, then you will not need to provide a product key during the Profitstar Client installation process.

If, however, you will be installing to one or more new machines, or if the institution has changed its licensed products, you will need a Product Key to unlock the products that your institution is currently licensed to install.

The Product Key is entered in the first step of the Profitstar Client Installer. (Step [11](#)) 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. Download the Installation Files

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

PROFITstar ALM/Budgeting	
Last Downloaded	File
NEW	<input type="checkbox"/> 2018. ProfitstarClient.exe
NEW	<input type="checkbox"/> 2018. ProfitstarServer.exe

# Profitstar Server Installation

## Steps 6 – 9

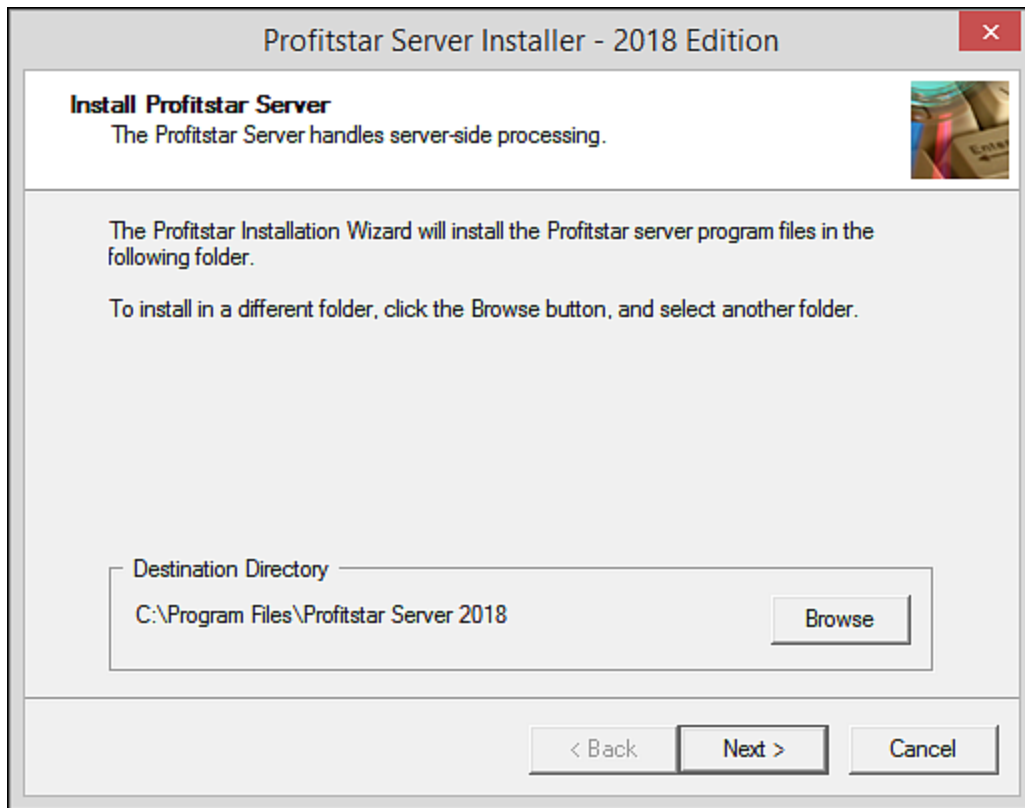
### 6. Install Profitstar Server

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

Before beginning the installation, remember that:

- 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**.
- The person installing the software needs [Administrator rights](#).
- [Remote installation](#) of the Profitstar Server is not permitted.

The first step asks you to specify a path for the Profitstar Server installation.

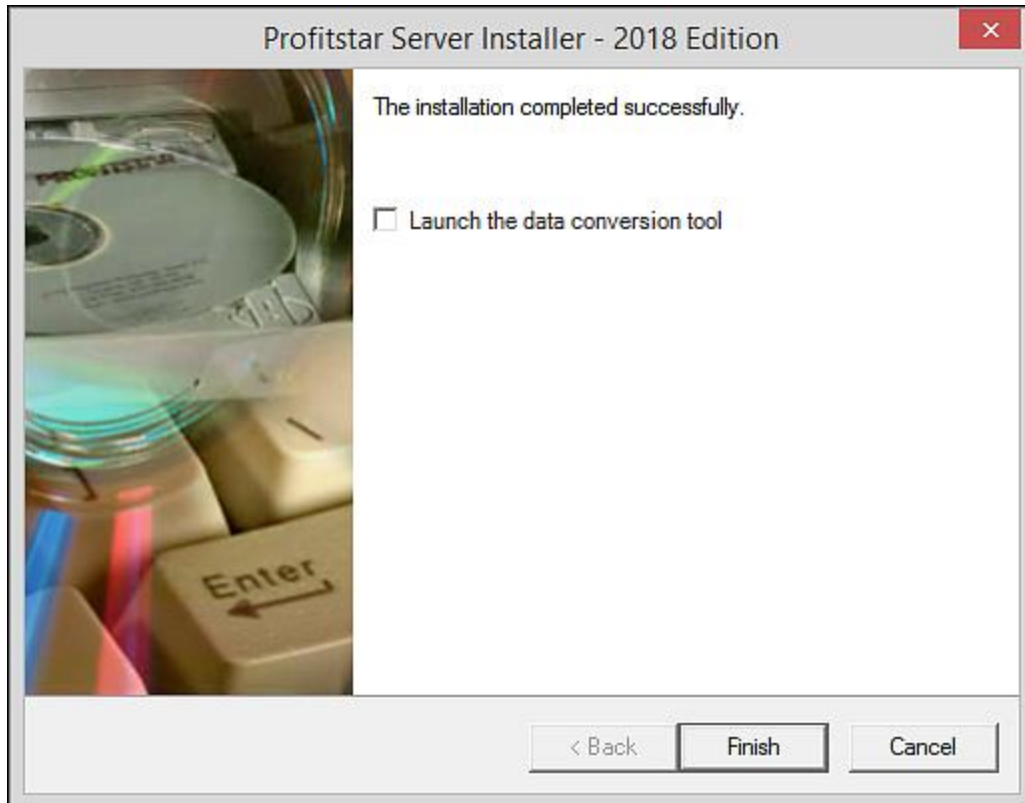


For performance reasons, the Profitstar Server and the SQL Server may be installed on different machines.

## 7. Server Components Installed

Following the installation of the Profitstar server, you will see a completion message.

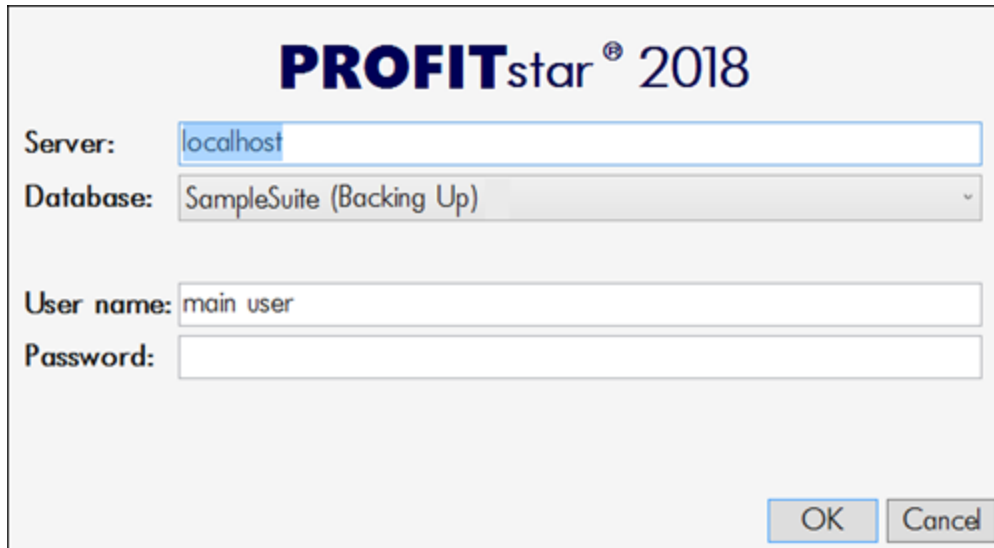
Since you are upgrading from a prior version of 2014 through 2018, it is not necessary to launch the data conversion tool. Make sure that the check box is cleared and click the **Finish** button.





## 8. Database Backup and Upgrade

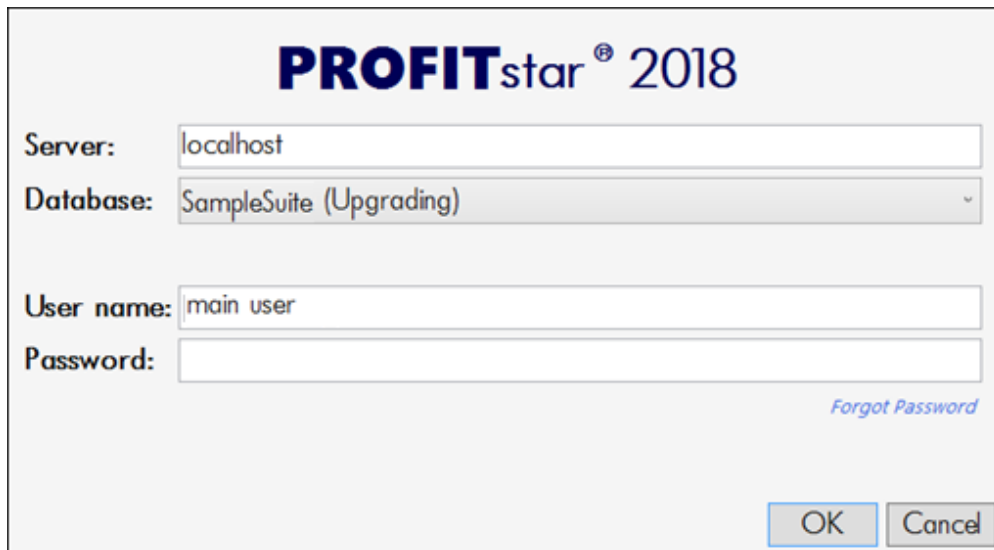
When a new version of the Profitstar Server is installed, a backup of your SQL database is automatically created.



The screenshot shows the 'PROFITstar® 2018' database backup configuration window. It contains the following fields and options:

- Server:** A text box containing 'localhost'.
- Database:** A dropdown menu showing 'SampleSuite (Backing Up)'.
- User name:** A text box containing 'main user'.
- Password:** An empty text box.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Following this, your data is upgraded.



The screenshot shows the 'PROFITstar® 2018' database upgrade configuration window. It contains the following fields and options:

- Server:** A text box containing 'localhost'.
- Database:** A dropdown menu showing 'SampleSuite (Upgrading)'.
- User name:** A text box containing 'main user'.
- Password:** An empty text box.
- Link:** A blue link labeled 'Forgot Password' located below the password field.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

These once-per-installation processes can require some time to complete. Factors such as code changes, network speed, and database size all influence how long the backup and upgrade will take.

**NOTE** Following the 2018 installation, the automatic updating of all configured databases may take a long time. As a result, large institutions may want to run the 2018 installations late in the day or in the evening.

If you attempt to log into the product immediately after completing the server and client installations, you may see the “(Backing Up)” or “(Upgrading)” messages next to the name of the database, in the Login screen. The act of logging in does not cause this database activity. Rather, these messages tell you what the Profitstar service is doing to your data and indicate why you are not permitted to log in.

You will need to wait until these processes are done—indicated when the parenthetical messages are removed.

## 9. Optimizer Considerations

For institutions that publish PROFITstar/PROFITability data to the Optimizer product:

- 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.
- 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.

# Client Installation

## Steps 10 – 13

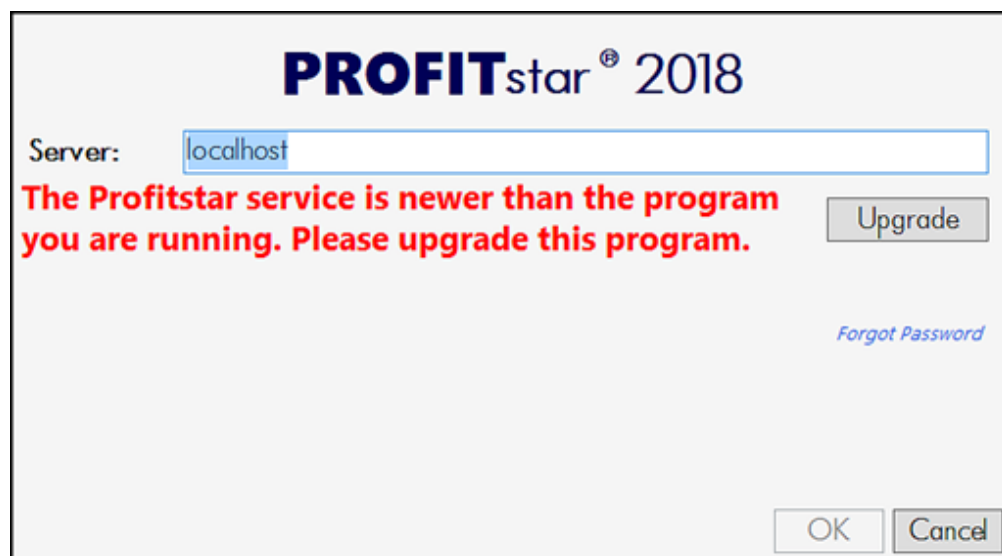
### 10. Client Installation

The client installation should be run when:

- You are currently installing to the Profitstar Server machine and PROFITstar will be run on this PC.
- 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 program on client PCs, users will subsequently be able to perform upgrades from their Login screens, whenever the Profitstar Server is upgraded.



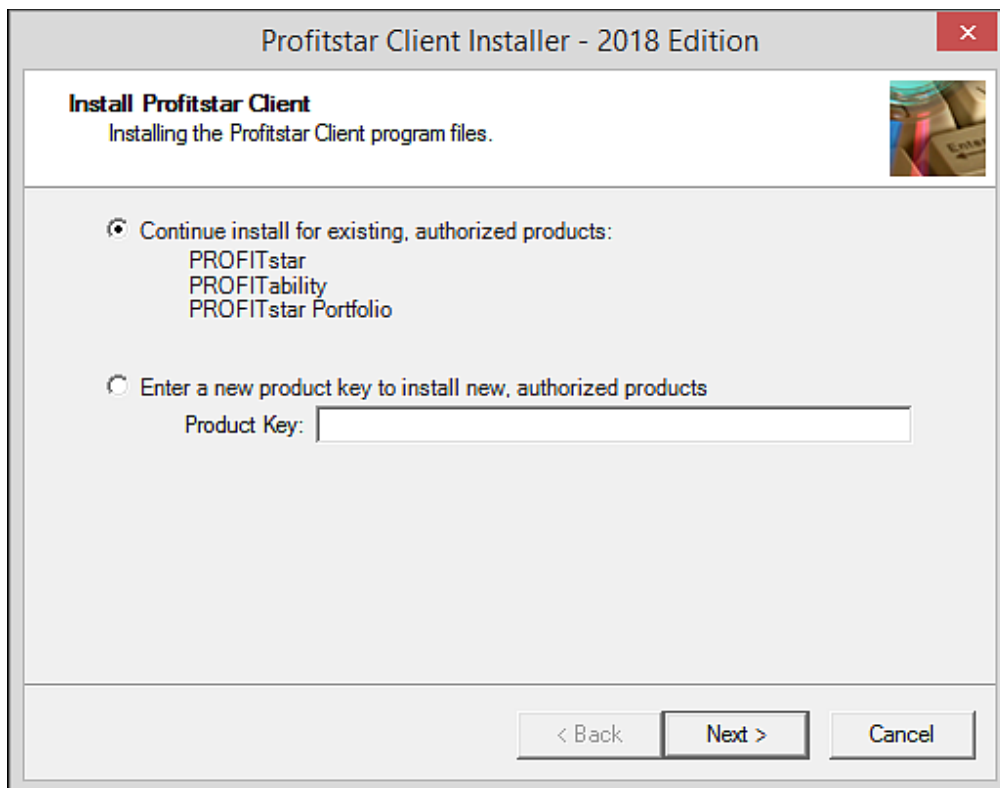
## 11. Install Profitstar Client (1)

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

If you are installing 2018 on a client PC that was previously used to run PROFITstar and if there have been no changes to the institution's licensed products, then you will not need to provide a product key during the Profitstar Client installation. If the correct authorized products are displayed under the first radio button, then click **Next** to proceed.

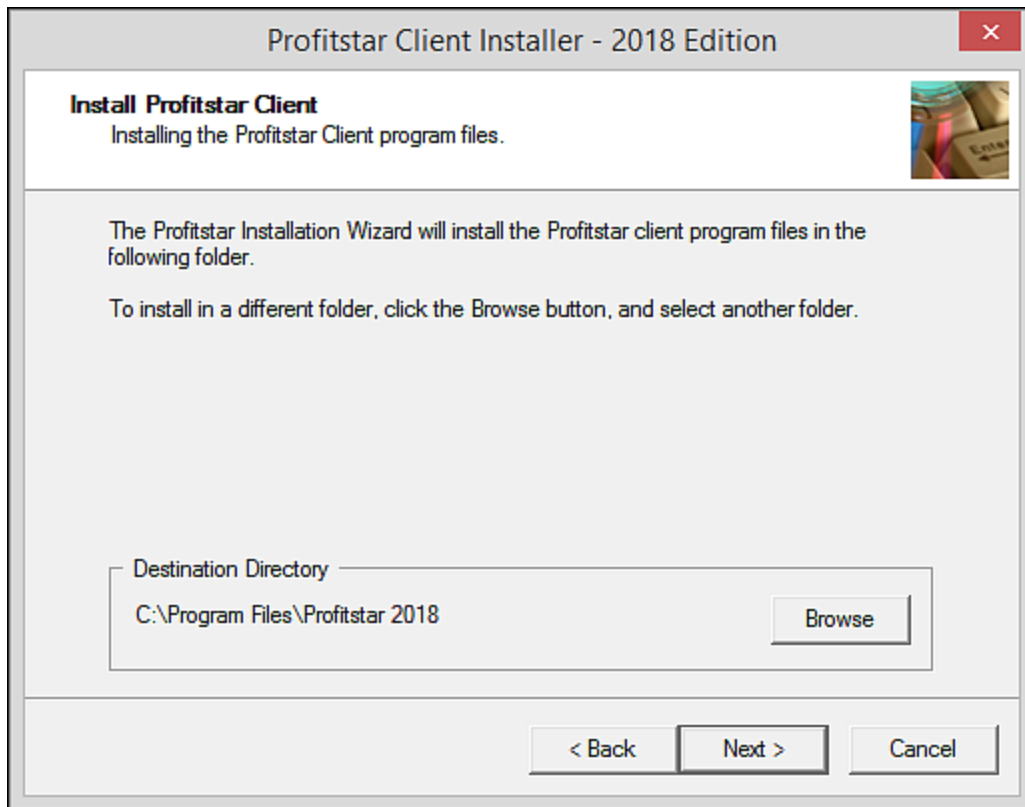
If, however, you are installing to a new machine, or if the institution has changed its licensed products, you will need to enter your institution's Product Key. The key controls which program files will be installed on the current computer.

If you do not have this institution-specific information, please contact your client services analyst at 800-356-9099.



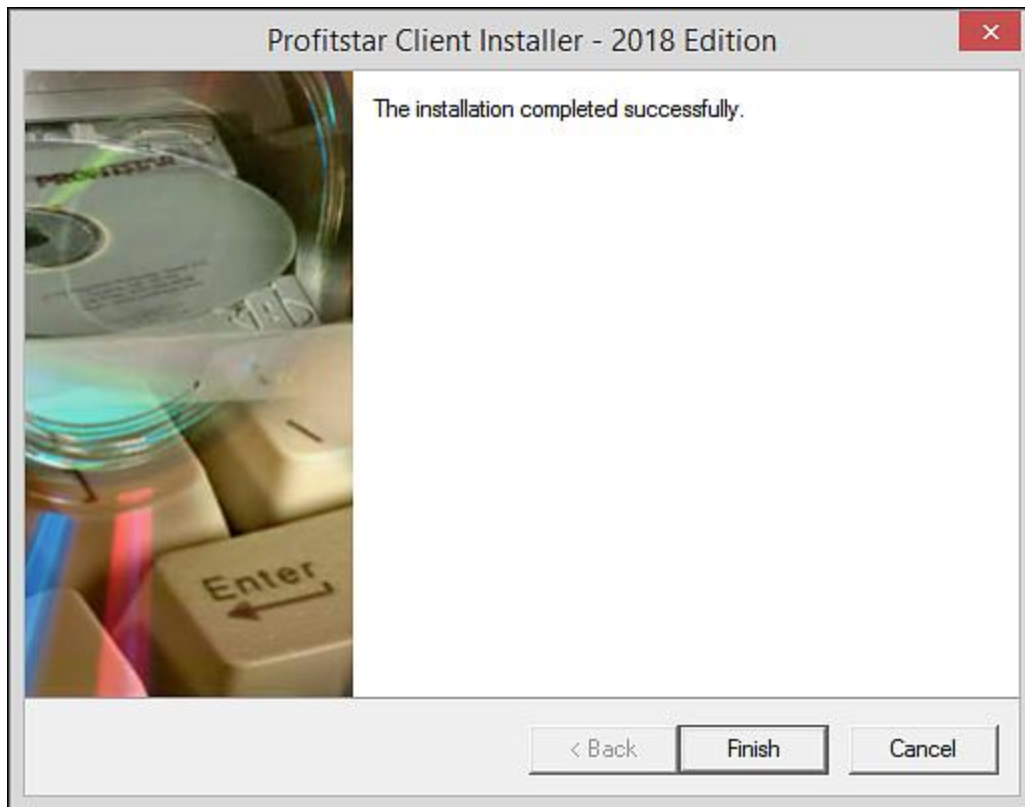
## 12. Install Profitstar Client (2)

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



### 13. 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.

**NOTE** if you attempt to log into the product immediately after completing the server and client installation processes, it may be necessary to wait until the program finishes upgrading the database. You will know that the upgrade is not yet finished if you see “[\(Upgrading\)](#)” next to the name of the database, in the Login screen.

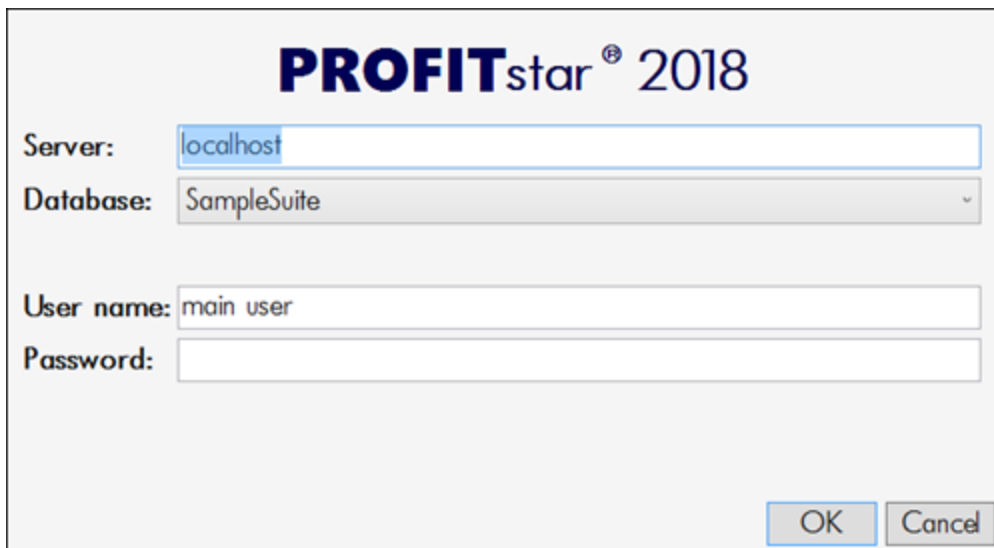
Depending on the programs installed on a user’s PC, either the **ps.exe** (for PROFITstar) or the **pa.exe** (for PROFITability) file, found in the **Profitstar 2018** folder, can be used to open the Login screen. PROFITstar and/or PROFITability shortcuts can also be found in the Windows Start menu.

The Login screen contains the following information:

- **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** – If User Permissions were previously set up, the user will need to enter a User name.
- **Password** – If a password is associated with the user, it is entered here.



The screenshot shows the PROFITstar 2018 login dialog box. It has a title bar and a main area with the following fields:

- Server:** A text box containing "localhost".
- Database:** A dropdown menu showing "SampleSuite".
- User name:** A text box containing "main user".
- Password:** An empty text box.

At the bottom right, there are two buttons: "OK" and "Cancel".

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/2018NoConversionInstall.pdf>

Installation instructions containing 2012 data conversion information

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

Installation instructions for new clients

<http://profitstarhelp.jackhenry.com/dev/2018NewInstall.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>