## **System Requirements**

- 1) Windows Server 2003 SP2, 2008, 2008 R2, 2012
- 2) Minimum 2GB Memory
- 3) Terminal servers are not supported
- 4) Virtual servers supported

## Software Requirements

- 1) SQL Server 2005 or higher (SQL Server Express is OK and free from Microsoft)
- 2) Microsoft SQL Server Management Studio
  - a. Express OK
  - b. Must be the same or higher version than you e-automate SQL Server. (i.e. if the e-automate SQL Server is 2008 R2, then we need Management Studio 2008 R2 or 2012)
- 3) E-Automate Client
- 4) .NET Framework 4.0
- 5) Crystal Reports
  - a. If you don't have a Crystal Reports license, then we will install a trial version of 2011
- 6) Network color printer installed that prints 11x17.
  - a. We'll never print to it but we need the print drivers for report formatting
- 7) LogMeIn remote access software
  - a. We like to install LogMeIn on our account for remote access to your server, please see link for more information: https://support.ceojuice.com/entries/23452967-CEO-Juice-access-to-your-server

# **Optional:**

- 8) Microsoft Excel 2003 or higher
- 9) Microsoft Outlook or Outlook Express

#### **Network Requirements**

- 1) Windows domain user called CEOJuice
  - a. Please set "Password never expires"
  - b. Add domain user in the Local Administrators group on server that will hold our software (see appendix A for instructions)
- 2) Email Address
  - a. If running Exchange, create an email address associated to the CEOJuice domain account.
  - b. If hosted offsite:
    - i. Create a ceojuice@domain email address **OR**
    - ii. Provide us with an email address and password that we should use to authenticate to your mail server

# SQL Server Requirements

- 1) SQL Server running e-automate
  - a. Create new database called CEOJuice (see Appendix B for instruction)
    - i. Change the Recovery Model to Simple
  - b. Create SQL Server Authentication User called CEOJuice
    - i. Use same password as domain user
    - ii. Uncheck "Enforce Password Expiration"
    - iii. Change default database to "CEOJuice"
    - iv. Assign db\_owner permissions to the following databases:
      - 1. CEOJuice
      - 2. CoSystem
      - 3. Your live e-auto database
      - 4. DGI's Analytics database if installed (it will be named the same as your live database with "Analytics" at the end)
- 2) SQL Server on server we will be installing our software
  - a. Create SQL Server Authentication User called CEOJuice
    - i. Use same password as domain user
    - ii. Uncheck "Enforce Password Expiration"
    - iii. Under Server Roles, check "sysadmin"
- 3) If you have a backup plan that is backing up your databases, please add the CEOJuice database to the backup plan to back it up regularly.

# **E-Automate Requirements**

- 1) Create an e-automate user called CEOJuice
  - a. Use the same password as domain user
  - b. Add the user to the admins group

We can help with the setup of any of the above items. If you have any questions or concerns, please email <u>help@ceojuice.com</u>

## Appendix A – Adding domain user as a local administrator on single server

After the domain user is created, log into the server where we will install our software.

1) Right click on Computer (or My Computer if Server 2003) and select Manage



2) In the tree on the left, expand Configuration -> Local Users and Groups



3) Double click on the Administrators group and Add the CEOJuice domain user.

Administrators Pre	operties		? ×
General			
Adminis	trators		
Description:	Administrators have comp to the computer/domain	ete and unrestricte	ed access
Members:			
Administrator	ain Admins		
Add	Remove Changes are not ef user logs	to a user's group m fective until the net on.	embership xt time the
	OK Cancel	Apply	Help

4) Click OK.

#### Appendix B - Creating new database and SQL Server Authentication User

Creating new database

- 1) Open SQL Management Studio and login.
- 2) In the tree on the left, right click on Databases, go to New Database...



3) Type CEOJuice into the database name.

🚪 New Database		_ O ×
Select a page	🔄 Script 👻 🖪 Help	
Poptions	Database name:	CEOJuice
in ogroupo	Owner:	<default></default>
	Use full-text indexing	

4) Scroll to the right to confirm the location of the database files. If the default location is not preferred, you can change it here (For example if you have a hard drive other than C:\ with more space)

🗧 New Database			
Select a page	Script 🝷 📑 H	elp	
Options Filegroups	Database name:		CEOJuice
	Owner:		<default></default>
	Database files: Logical Name	_	Path
	CEOJuice		D:\Program Files\Microsoft SQL Server\MSSQL10.MSSQLSERVER\MSSQL\D
	CEOJuice_log		D:\Program Files\Microsoft SQL Server\MSSQL10.MSSQLSERVER\MSSQL\D

5) On the left hand side of the window, click Options

📱 New Database	
Select a page	
🚰 General	
Options	
Filegroups	

6) Change the Recovery Model to Simple

🚪 New Database		
Select a page	Script - 📑 Help	
Options Pilegroups	Collation:	
	Compatibility level:	
·	Other options:	

7) Click OK

Creating SQL Server Authentication User

- 1) Open SQL Server Management Studio and login.
- In the tree on the left, expand Security -> Logins, right click on Logins and select New Login...



3) Type CEOJuice in the login name, change the user type to SQL Server Authentication, Specify a password

Login - New		
Select a page	Script - 🚺 Help	
Server Roles User Mapping Securables	Login name: CEOJuice	Search
A Status	SQL Server authentication Password: Confirm password:	=
	Confirm password:	

4) Uncheck Enforce Password Expiration and change the default database to CEOJuice

	Usermust change pass Mapped to certificate Mapped to asymmetric key	word at next login		<b>•</b>	
	Map to Credential			~	Add
Connection Server: localhost Connection: JUICE\aj IV New connection properties	Mapped Credentials	Credential	Provider		
Progress	•			R	emove
Heady	Default database:	CEOJuice		<u> </u>	
44 P.	Default language:	<default></default>		-	

5) On the left, choose User Mapping.



6) Check the Map check box next to the CEOJuice database, and check db\_owner in the bottom pane, third from the bottom. Repeat for live eauto database, CoSystem, and Analytics databases.

Login - New					_ 🗆 X
Select a page General Server Boles	Script ·	🕶 📑 Help			
User Mapping	Users ma	pped to this login:			
Securables	Map	Database	User	Default Schema	<b></b>
Status		CEOJuice	CEOJuice		

db_accessadmin	
db_backupoperator	
db_datareader	
db_datawriter	
db_ddladmin	
db_denydatareader	
db_denvdatawriter	
db_owner	
db_securityadmin	
✓ public	

7) Click OK.