

# Encore Server Prep for Windows 10

Encore Workforce Optimization Solution  
Version 7.1 or later

October 9, 2019

The logo for Encore, featuring the word "encore" in a bold, lowercase sans-serif font. The letter "o" is replaced by a circular icon with a colorful, multi-segmented design.

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# Pre-Operating System Configuration and Considerations

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The Encore Server, when built on a physical server, includes four physical drives, in two mirrored sets. A Small Business Server has only three physical drives, one standalone drive and two in a mirrored set. **Prior to or during the operating system load, configure the disks and partition them in following manner for optimal performance:**

- Physical drive/container 1 includes these partitions:
  - Drive C: for the OS (100GB)
  - Drive F: for database backups only (all remaining space) – Volume label: **SQL-Backup**
- Physical drive/container 2 includes these partitions:
  - Drive D: for EncData (Full-drive capacity minus 20GB) – Volume label: **EncData**
  - Drive E: for MSSQL databases (20GB) – Volume label: **SQL**
  - Assign the optical drive to G:

## Assign the Administrator Account Password

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In Windows 10, the Administrator account is disabled so we will create the Encoreserver account during the Windows 10 installation and then enable the Administrator account.

1. When prompted by the Windows 10 Operating System installation, create/set the Account name to **Encoreserver** and the password to **P@ssword**.

If you are building this system for use in your enterprise, select a password that meets your corporate standards.

2. Log in using the **Encoreserver** account.
3. Open **Command Prompt (Admin)** and enter **net user administrator /active:yes** to activate the administrator account.
4. In the same **Command Prompt (Admin)**, enter **net user administrator \*** to set a password for the administrator account.
  - a. You will get a password prompt. Type in **P@ssword** for the first and second verification entry. If you are building this system for use in your enterprise, select a password that meets your corporate standards.
5. Log out of the Encoreserver account and log into the Administrator account.

# Disk Management

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In this section, the hard drives are partitioned, and the drive letters and volume labels are assigned.

1. Right-click the **Start Menu** and select **Disk Management**.
2. When **Disk Management** opens you may see a couple scenarios. Follow the steps as appropriate.
  - If Disk 1 was not configured during the operating system installation, you are prompted to initialize Disk 1. Generally, you will want to select the MBR option. If Disk 1 is 2TB or larger, then you need to select the GPT option. The rest of these steps assume the MBR option was selected.
  - If Disk 1 shows as Offline, right-click Disk 1 and select **Online**. Then right-click again and select **Initialize Disk**. You are prompted to initialize Disk 1. Generally, you will want to select the MBR option. If Disk 1 is 2TB or larger, then you need to select the GPT option. The rest of these steps assume the MBR option was selected.
3. Change the DVD drive letter to **G** by right-clicking it and selecting the **Change Drive Letter and Paths** option.
4. Click **Change**.
5. Select **G** and click **OK**.
6. If the warning, **Some programs that rely on drive letters might not run correctly. Do you want to continue?** message opens click **Yes**.
7. Right-click the unallocated section of **Disk 0** and select **New Simple Volume**.
8. When the **Welcome** window opens, click **Next**.
9. On the **Specify Volume Size** window, accept the default of the maximum disk space and click **Next**.
10. On the **Assign a Drive Letter or Path** window, select drive letter **F** and click **Next**.
11. On the **Format Partition** window, choose **Format this partition with the following settings** option and select:
  - **File system – NTFS**
  - **Allocation unit size – Default**
  - **Volume label – SQL-Backup**
12. Select the **Perform a quick format** option and then click **Next**.
13. Click **Finish**.
14. In the **Action** drop-down menu, select **Refresh**.
15. Right-click the unallocated section of Disk 1 and select **New Simple Volume**.
16. When the **Welcome** window opens, click **Next**.
17. On the **Specify Volume Size** window, take the value in **Maximum disk space in MB** and subtract 20,480. Enter this number in the **Simple volume size in MB** field. This is the size of the D: drive. Click **Next**.

18. On the **Assign a Drive Letter or Path** window, select **D** in the **Assign the following drive letter** field and click **Next**.
19. On the **Format Partition** window, choose **Format this partition with the following settings** option and select:
  - **File system – NTFS**
  - **Allocation unit size – Default**
  - **Volume label – EncData**
20. Select the **Perform a quick format** option and then click **Next**.
21. Click **Finish** to create the D drive.
22. Right-click the remaining **Unallocated space** on Disk 1 and select **New Simple Volume**.
23. Click **Next**.
24. On the **Specify Volume Size** window, accept the defaults to create the E drive in the remaining free space. Click **Next**.
25. On the **Assign a Drive Letter or Path** window, select **E** in the **Assign the following drive letter** field and click **Next**.
26. On the **Format Partition** window, choose **Format this partition with the following settings** option and select:
  - **File System – NTFS**
  - **Allocation unit size – Default**
  - **Volume label – SQL**
27. Select the **Perform a quick format** option and then click **Next**.
28. Click **Finish** to create the logical drive E.
29. Exit the **Disk Management** window.
30. You may see pop up messages regarding the need to format the D, E and F drives. Click **Cancel** since we have already formatted these drives.

## Set Network Profile

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Windows Server sets the network profiles for all NICs to Public. To avoid problems with firewall exception assignments later, perform the following steps to change the profile to **Private** or ensure domain attached NICs are set to **Domain** by the customer's IT department.

1. Right-click the **Start** menu and select **Control Panel**.
2. Select **Administrative Tools**.
3. Select **Local Security Policy**.
4. Select **Network List Manager Policies**.
5. Right-click **Unidentified Networks** and select **Properties**.
6. Set the **Location type** to **Private**.

7. Select **OK**.
8. Follow steps 5 through 7 for the **Identifying Networks**.

# Configure Windows Server

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## Set Required System and User Policies

1. Right-click the **Start** menu and select **Run**.
2. In the **Run** box, type **gpedit.msc** and click **OK**.
3. In the **Local Group Policy Editor**, navigate to **Computer Configuration | Windows Settings | Security Settings | Local Policies | Security Options**.
4. In the list on the right find the policy called **User Account Control: Behavior of the elevation prompt for administrators in Admin Approval Mode**.
5. Right-click the policy and select **Properties**.
6. Select **Elevate without prompting** from the drop-down list and click **OK**.
7. In the same list, find the policy called **User Account Control: Run all administrators in Admin Approval Mode**.
8. Right-click the policy and select **Properties**.
9. Change the policy to **Disabled** and click **OK**.
10. You may see a notification that says the computer must be rebooted for the new settings to take effect. Ignore that for now; we will reboot the computer in a later step.
11. Navigate to **Computer Configuration | Administrative Templates | System**.
12. In the pane on the right, select the **Display Shutdown Event Tracker** setting.
13. Right-click the setting and select **Edit**.
14. Choose the **Disabled** radio button and click **OK**.
15. Navigate to **Computer Configuration | Administrative Templates | Windows Components | Windows Error Reporting**.
16. In the pane on the right, select the **Prevent display of the user interface for critical errors** setting.
17. Right-click the setting and select **Edit**.
18. Choose the **Enabled** radio button and click **OK**.
19. Navigate to **User Configuration | Administrative Templates | Windows Components | Attachment Manager**.
20. In the pane on the right, select the **Do not preserve zone information in file attachments** setting.
21. Right-click the setting and select **Edit**.
22. Choose the **Enabled** radio button and click **OK**.
23. Close the **Local Group Policy Editor** window.

24. Right-click the **Start** menu and select **Run**.
25. In the **Run** box, type **regedit** and click **OK**.
26. Navigate to **HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Windows\Windows Error Reporting**.
27. On the right, edit or add, if it doesn't exist, the key **DontShowUI** and set it to **1**. If you need to add the key, the type should be **REG\_DWORD**.
28. Next navigate to **HKEY\_CURRENT\_USER\Software\Microsoft\Windows\Windows Error Reporting**.
29. On the right, edit or add, if it doesn't exist, the key **DontShowUI** and set it to **1**. If you need to add the key, the type should be **REG\_DWORD**.

## Set up Local Users for Windows Server

1. Right-click the **Start** menu and select **Computer Management**.
2. Click the plus sign next to **Local Users and Groups**.
3. Click the **Users** folder and double-click the **Administrator** account to bring up its properties.
4. Verify that the **Password never expires** box is the only box checked. If it's unchecked, check it.
5. Click **OK** to save the changes.
6. Right-click the **Users** folder and select **New User**.
7. Double-click the **encoreserver** account to bring up its properties.
  - Remove the check from the **User must change password at next logon** option
  - Check the **Password never expires** box
8. Click **OK** to save the changes.
9. Click the **Groups** folder. On the right side of the window, double-click the **Administrators** group.
10. Click **Add**.
11. Enter **encoreserver** in the object names box and click the **Check Names** button.
12. Click **OK** and then **Apply**.
13. Close the Server Manager application.

## Turn off DEP (Data Execution Prevention)

1. Right-click the **Start** menu and select **Command Prompt (Admin)**.
2. In the command prompt, enter:

```
bcdedit.exe /set {current} nx AlwaysOff
```

then press [Enter].
3. To verify that the change took place, just run **BCDEDIT** without parameters and under the {current} identifier check that the **nx** parameter is now set to **AlwaysOff**.
4. Close the command prompt.

## System Properties

1. Right-click the **Start** menu and select **Control Panel**.
2. Select **System**.
3. Click the **Remote settings** link on the left.
4. The **System Properties** window opens to the **Remote** tab. Under **Remote Desktop**, select the **Allow remote connections to this computer** option. A window opens informing you that a Windows Firewall exception has been made. Click **OK**.
5. Click **Apply**.
6. Select the **Advanced** tab.
7. Under **Startup and Recovery**, click **Settings**.
8. Under **System** startup, enable and change both **Time to display** options to **5** seconds.
9. Change the **Write debugging information** option to **Small memory dump (256KB)**.
10. Click **OK**.
11. Click the **Computer Name** tab and click the **Change** button.
12. Update the computer name to follow this formatting convention: **ENCXXXX** (with XXXX being the month and day, such as **0709** for July 9). If you are building this system for use in your enterprise, select a name that meets your corporate standards.  
  
Encore server machine names must be 15 characters or less due to a limitation in NetBIOS. Since UNC paths are used to access Encore files across the network and internally, a machine name longer than 15 characters cannot be accessed via the UNC path.
13. Click **OK**, then click **OK** again and click **Close**. Reboot the machine when prompted.

## Configure the server roles and required features

1. After the reboot, login as **Administrator** again and open the **Control Panel**.
2. Select **Programs and Features**.
3. In **Programs and Features** select **Turn Windows features on or off**.
4. Check **.NET Framework 3.5 (includes .NET 2.0 and 3.0)**.
5. Check **.NET Framework 4.6 Advanced Services**.
6. Expand **Internet Information Services**.
7. Expand **Web Management Tools**.
  - Check **IIS Management Console**.
8. Expand **World Wide Web Services**.



9. Expand **Application Development Features** and check the following options:
  - **.Net Extensibility 3.5**
  - **.Net Extensibility 4.6**
  - **ASP.NET 3.5**
  - **ASP.NET 4.6**
  - **ISAPI Extensions**
  - **ISAPI Filters**
10. Expand **Common HTTP Features** and check the following options:
  - **Default Document**
  - **Directory Browsing**
  - **HTTP Errors**
  - **HTTP Redirection**
  - **Static Content**
11. Expand **Health and Diagnostics** and check the following options:
  - **HTTP Logging**
  - **Request Monitor**
12. Expand **Performance Features** and check the following option:
  - **Static Content Compression**
13. Select the **Simple Network Management Protocol (SNMP)** option.
14. Select **OK** to start the install process.

## Install .NET Framework 4.7.2

1. Navigate to <https://dotnet.microsoft.com/download/dotnet-framework/net472> and click on the “Download .NET Framework 4.7.2 Runtime” link to download the software installation executable.
2. Once downloaded, run NDP472-KB4054531-Web.exe to install the software.
3. You will be prompted to reboot. If you don’t want to reboot immediately, make sure you reboot before the “Install Important Updates” section.

## Configure Windows Update Server

1. Right-click the **Start** menu and select **Run**.
2. In the **Run** box, type **gpedit.msc** and click **OK**.
3. Browse to the path **Computer Configuration\Administrative Templates\Windows Components\Windows Update**.
4. Select **Configure Automatic Updates** policy and choose to edit the policy.

5. Select the **Enable** marker.
6. Under **Options** section set the Configure automatic updating to **2 – Notify for download and auto install**.
7. Enable/check the **Install updates for other Microsoft products** option.
8. Select **Apply** then **OK**.

## Install Important Updates

On the **Windows Update** window, if any important updates are available click the link for the important updates, verify that only important updates are selected and then click **Install** to install them. You may be prompted to install the **Windows Malicious Software Removal Tool x64**. If so, select **I accept the license terms** and click **Finish**. After the updates are installed, if prompted to reboot, do so.

After the system reboots or after the updates are installed and no reboot is prompted, return the Windows Update screen and select the **Check for updates** link. Continue to apply all important updates until only optional updates are presented. Select the optional updates link and select any updates related to Microsoft Silverlight and click **OK**. On the **Windows Update** screen, select **Install Updates**. Accept the license terms if prompted. After any update, always check for important updates and apply them. Once all important or optional Silverlight updates have been applied, reboot the server and continue.

## Configure encoreserver User Settings

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1. Log on using **encoreserver**.

### Customize the Desktop

1. Click **Start** and select **Windows Settings**.
2. Select **Personalization**.
3. Select **Themes**.
4. Select **Desktop icon settings**.
5. Make sure **Computer** and **Recycle Bin** are selected and then click **OK**.

### Set Up the Folder View

Complete the following steps to standardize the folder views for the Encore system.

1. Right-click the **Start** menu and select **Control Panel**.
2. Open the **File Explorer Options**.
3. Click the **View** tab.
4. Verify the following items are selected:
  - **Always show icons, never thumbnails**
  - **Always show menus**
  - **Display file icon on thumbnails**
  - **Display files size information in folder tips**
  - **Show hidden files and folders and drives**
  - **Hide protected operating systems files**
  - **Show drive letters**

5. Verify the following items are not selected:
  - **Hide empty drives**
  - **Hide extensions for known file types**
  - **Hide folder merge conflicts**
  - **Use Sharing Wizard**
6. Click **Apply**.
7. Click the **Search** tab.
8. Enable the **Always search file names and contents (this might take several minutes)** option.
9. Click **OK** to close the **Folder Options** window.
10. Open a Windows Explorer window.
11. Right-click the blank space on the left panel of the **Windows Explorer** window and select **Show All Folders**.

## Configure Action Center

1. Right-click the **Start** menu and select **Control Panel**.
2. Select **Security and Maintenance**.
3. Expand the **Security** section.
4. Click the **Turn off messages about Windows SmartScreen** link.
5. Close the **Control Panel**.
6. Right-click the **Start** menu and then **Run**. In the **Run** box, type **regedit** and click **OK**.
7. Navigate to **HKEY\_CURRENT\_USER\SOFTWARE\Microsoft\Windows\Windows Error Reporting**.
8. Set the key **Disabled** to **1**.
9. Close the **Registry Editor**.

## Configure Internet Options

1. Right-click the **Start** menu and select **Control Panel**.
2. Select **Internet Options**.
3. Select the **Security** tab.
4. With the **Internet zone** selected, click **Custom level**.
5. Scroll about halfway down to the **Downloads** section and **Enable** the **File download** option and click **OK**. Answer **Yes** to the warning prompt and then **OK** to close the **Internet Options**.
6. Close the Control Panel.

The Server is now ready for Encore software to be installed.