

Encore Server Prep for Windows Server 2022

Encore Workforce Optimization Solution
Version 9.1 or later

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 **encore**

**For Dealer
and Customer
Use Only**

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Pre-Operating System Configuration and Considerations

The VM or physical server used for an Encore system must meet or exceed the minimum specifications. Refer to the **Encore Specifications** document for server requirements.

Assign the Administrator Account Password

If you are building this system for use in your enterprise, select a password that meets your corporate standards. During software installation, DVSAntalytics installation technicians will need to log into the server using the local Administrator account or a member of the local Administrators group. Once software is installed and configured, the server will not need access to the local administrator account until the next software upgrade.

Disk Management

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

1. Right-click the **Start** icon 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 MBR 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 MBR was selected.
3. If present, change the DVD drive letter to **G** by right-clicking it and selecting the **Change Drive Letter and Paths** option and Click **Change**.
4. Select **G** and click **OK** and **Yes** to any warnings.
5. Right-click the unallocated section of **Disk 1** and select **New Simple Volume**.
6. When the **Welcome** window opens, click **Next**.
7. On the **Specify Volume Size** window, allocate the entire volume and click **Next**.
8. On the **Assign a Drive Letter or Path** window, select **D** in the **Assign the following drive letter** field and click **Next**.
9. 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**
10. Select the **Perform a quick format** option and then click **Next**.
11. Click **Finish** to create the D drive.
12. Exit the **Disk Management** window.

Set Network Profile

Windows Server sets the network profiles for all NICs to Public by default. 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.

GUI

1. Open **Windows Settings**.
2. Navigate to **Network & Internet**.
3. On the left, click **Ethernet**.
4. On the right, click the network name for the connected NIC.
5. Under **Network Profile** select **Private**.
6. Close Windows Settings.

PowerShell

1. Open an elevated PowerShell (Right-click the **Start** icon and select **Windows PowerShell (Admin)**).
2. In the PowerShell prompt, enter:
`Get-NetConnectionProfile`
3. Note the **InterfaceIndex** values for any interfaces with their NetworkCategory set to **Public**.
4. Enter the following, replacing **##** with the InterfaceIndex value noted in above.
`Set-NetConnectionProfile -InterfaceIndex ## -NetworkCategory Private`
5. Repeat step 4 until all interfaces are set to **Private**.
6. To verify that all interfaces have their NetworkCategory set to Private, enter:
`Get-NetConnectionProfile`

Configure Windows Server

Windows Updates

Be sure that Windows updates are current for this server prior to the installation of the Encore software.

DVSAanalytics strongly recommends that Automatic Windows Updates be disabled on the Encore server and that monthly patching be performed on a manual and scheduled basis. If disabling Automatic Windows Updates, follow these steps.

1. Right-click the **Start** icon and select **Run**.
2. In the **Run** box, type **gpedit.msc** and click **OK**.
3. Navigate to **Computer Configuration | Administrative Templates | Windows Components | Windows Update**.
4. Select **Configure Automatic Updates** and select **Disabled**.
5. Select **Apply** then **OK**.

System Properties

1. Select **Start** icon and select **Server Manager**.
2. Select **Local Server**.
3. Under the **PROPERTIES** section select **Disabled** text next to **Remote Desktop**.
4. 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. Click the **Computer Name** tab and click the **Change** button.
Select a name that meets your corporate standards, but keep the name to 15 characters or less. 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.
8. Click **OK**, then click **OK** again and click **Close**. Restart the machine when prompted.

CAUTION

Do not proceed to next section until the machine has been restarted.

Configure the server roles and required features

1. After the restart, login as **Administrator** again. Select the **Start** icon and select **Server Manager**.
2. Select **Local Server**.
3. In the **Roles and Features** section, select the **Tasks** drop-down and then **Add Roles and Features**.
4. The **Add Roles and Features Wizard** opens. Click **Next**.
5. Select the **Role-based or feature-based installation** radio button. Click **Next**.
6. Click the **Select a server from the server pool** radio button. Make sure your local server is selected and click **Next**.
7. On the **Select server roles** window, select **Web Server (IIS)**. A prompt opens to **Add feature that are required for Web Server (IIS)**. Click **Add Features** and click **Next**.
8. On the **Select features** window, select the following features and sub features (if prompted, add required features and roles as necessary):
 - **.NET Framework 4.8 Features**
 - **.NET Framework 4.8**
 - **ASP.NET 4.8**
 - **WCF Services**
 - **HTTP Activation**
 - **TCP Port Sharing**
9. Click **Next**.
10. On the **Web Server Role (IIS)** window click **Next**.
11. On the **Select Role Services** window, make sure the following are checked:

NOTE

When selecting roles and features, you may be prompted to add another server role, follow the on-screen prompts, and accept the defaults.

- **Common HTTP Features**
 - **Default Document**
 - **Directory Browsing**
 - **HTTP Errors**
 - **Static Content**
 - **HTTP Redirection**
- **Health and Diagnostics**
 - **HTTP Logging**
 - **Logging Tools**
- **Performance**
 - **Static Content Compression**
- **Security**
 - **Request Filtering**
- **Application Development**
 - **.NET Extensibility 4.8**
 - **ASP.NET 4.8**
 - **ISAPI Extensions**
 - **ISAPI Filters**
- **Management Tools**
 - **IIS Management Console**

12. Click **Next** to confirm the changes.
13. On the **Confirm installation selections** window, you may be prompted to specify an alternate source path. If no change is made, the installation will attempt to pull the needed files from **Windows Update**. This is the preferred method, but if no internet connection is available, you can specify a local source before proceeding. Follow the instructions provided in the **Specify an alternate source path** link. Click **Install** to proceed with the changes.
14. Reboot the server if prompted.

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