

## **Network Preparation**

Your network should be prepared by a qualified technician using industry standard equipment and protocols. These are a few basic requirements:

1. Hubs must not be used. Rather, only switches operating at a minimum speed of 100Mbps.
2. All wireless connections must be secured, at a minimum, using the authentication method 'WPA-PSK'.
3. Wireless connections slower than 54Mbps may be insufficient run Execu/Tech software outside of a Terminal Services environment. Contact Execu/Tech for a benchmark application to determine if your network speed is sufficient.
4. Public networks (wired and wireless internet, printers, etc. which are provided for guest use) must be separate from the local, private network used by Execu/Suite.
5. Windows users should be assigned to each employee needing access to Execu/Suite with strong passwords. Passwords should be a minimum of 7 characters containing numbers and letters. Passwords should be required to be changed at least every 90 day and can't be the same as any of the previous 4 passwords.
6. Built in 'administrator' accounts should be disabled for remote access *after* alternate user specific administrator accounts have been created. The 'administrator' account is the most commonly used account for brute force attacks and disabling it is the only sure way to prevent its eventual compromise.
7. Up to date antivirus software must exist on all computers on the local, private network, especially the server.
8. A hardware firewall should be between the local, private network and all other networks and the internet.
9. Physical access to all computers on the local, private network should be restricted to only those with a legitimate business need. Physical access to all computers Running Execu/Suite should also be restricted to only those users with a legitimate business need.
10. Internet access on all computers on the local, private network should be restricted to trusted websites with a legitimate business need.

## **Shift4 Installation**

If you've chosen to process credit cards through Execu/Suite, Shift4 will be in contact with you regarding the installation of the Shift4 software. Their technicians will perform the installation, remotely.

## **Software Installation**

When installing Execu/Suite on the client or server, you must be logged in as a Windows Administrator to ensure the proper registration of ActiveX Controls. After a successful installation and registration of ActiveX controls, you may remove the user from the Administrators group. All users who run Execu/Suite will need to have full control of the Execu/Suite folder.

### **Installing on the Server**

Obtain the latest software from Execu/Tech Systems, Inc. before installing. Install the software on the server, first. While we prefer that you install the software to the default location, the actual install location is entirely up to you and poses no issues in the operation and support of the software provided the appropriate network users are granted access. Once the software is installed, you will see a shortcut on the desktop. Run the software, using this icon, to be sure it installed properly. Call Execu/Tech Systems, Inc. tech support if you have any questions as to whether or not it was installed properly. This is the first step and we want to make sure it's successful.

After the software is installed on the server, be sure that the folder is shared to the appropriate users so they can connect from the client computers within the local, private network.

### **Installing on the Client**

When installing Execu/Suite on the client, you have two options. The first, and most common, is to create a shortcut that runs the software from the server. The second is to use Microsoft Terminal Services and run the software via Remote Desktop. In either method, each client must have a different terminal number specified in the shortcut. The terminal number is a two digit number from 01 to 99 placed at the end of the shortcut. After manually creating the shortcut, you'll need to run Execu/Suite and log in with your ID and password. If you're shown a window asking you to "Enter Company Code," it's because this terminal number has never been used. The default company number is 01 but you should ask management what the proper terminal number is before entering one. If nobody knows this number, just chances are it's 01. Once logged in, click on 'File', located in the top left of the menu bar, then click 'Special' and then 'Register Programs and Controls'.

**The first option, creating a shortcut on the client.**

**DO NOT USE A MAPED DRIVE!**

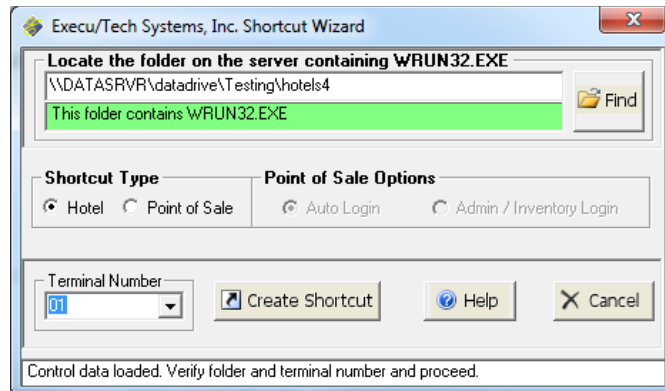
Follow this example to create a shortcut:

**Target: "\\server\share\wrun32.exe" -w -c wruncbl.fil START 01**

**Start In: "\\server\share\"**

To assist with this first method, we provide a program called the Shortcut Wizard. This program will create a shortcut using a correct command line and will automatically register all ActiveX controls. If you'd rather not manually create the shortcut, use this program to create a desktop shortcut for you. The details are discussed on the next page.

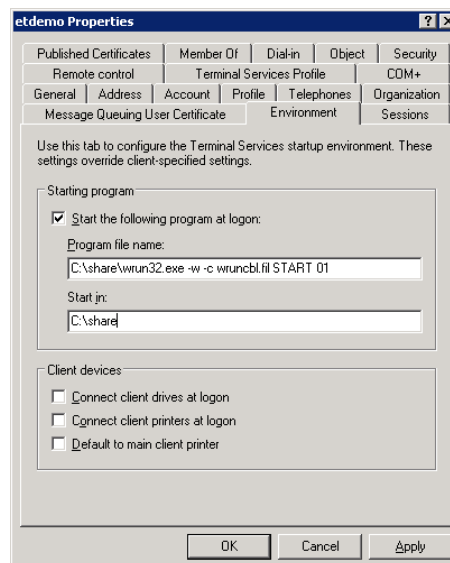
Using the shortcut Wizard.



From the client computer, browse to the server's shared folder containing the Execu/Suite software and look for the program 'ETShortcutWizard.exe' and run it. This window will be unresponsive as long as the bottom status bar is blinking red and white with the message, "Loading user control data. This may take a couple minutes so be patient." It's compiling a list of all ActiveX controls and DLLs that need to be registered. When it's done you'll see the status bar remain white with the message, "Control data loaded. Verify folder and terminal number and proceed." At this point, you'll also notice that the 'Create Shortcut' button has appeared. A window will appear with several options. Since the program was run from the Execu/Suite folder, you don't have to locate the folder, that field will already be filled with the correct folder. To create a shortcut for Execu/Suite, you simply need to select your desired terminal number then click the 'Create Shortcut' button. You won't be notified if your selected terminal number is already in use, so be sure you're selecting the correct terminal number to avoid any confusion or security warnings when running Execu/Suite.

The second option, Terminal Services and Remote Desktop.

The Execu/Suite is configured to run using the 'Environment' tab of the user in 'Active Directory Users and Computers'. Rather than placing the command line in 'Target:', you'll place it in 'Program file name'. If your server and Terminal Services server aren't the same machine, be sure to use the UNC, just like in the first option. Otherwise, you may use the drive letter, just like in the example image.



Make sure that the disconnected session settings are set in accordance to the needs of the property. You may want to be able to reconnect to a session after a few minutes if you experience frequent disconnects. You also want to make sure that a disconnected session doesn't remain in that state indefinitely, causing the number of available users to be reduced by one even though the session isn't in use. Setting an appropriate duration to 'End a disconnected session' can give the user time to reconnect if needed but allow the count of active users to be accurate if you're unable to reconnect and close Execu/Suite, properly.

**This is the end of the document.**