

**OnPremises  
Technical Checklist**

# *PMAPS® WebPro Installed*

## *Technical Requirements Checklist*

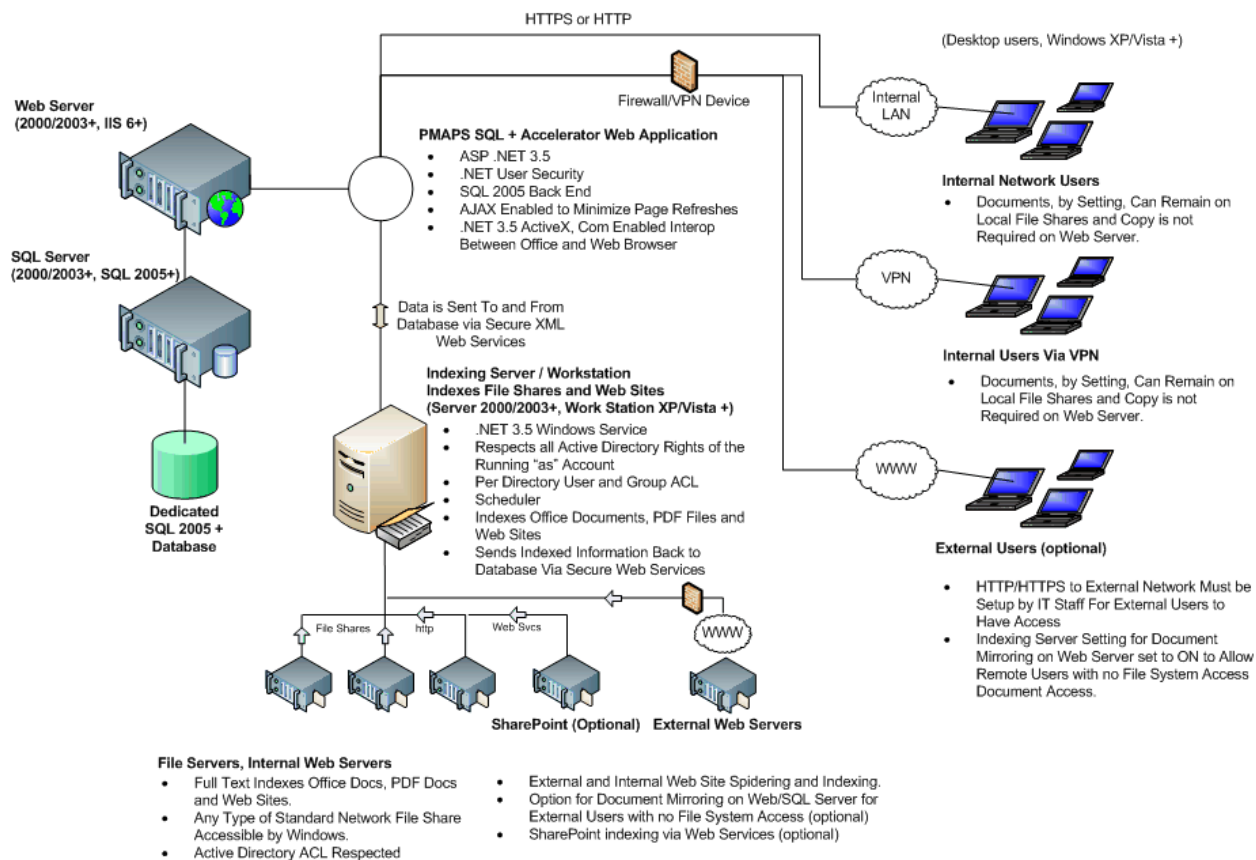
This document contains a checklist of items that are required prior to the PMAPS® WebPro installation. Please complete this form and return a copy to your Proposal Software implementation coordinator as we will use this for all troubleshooting. For any sensitive data that you do not want Proposal Software to read, please complete the field on your copy only and place xxx in the our copy.

Fill in the blanks (“Value” column) and initial each item (“Verified By” column) for required information. This document provides all of the settings that you will need for a successful installation.

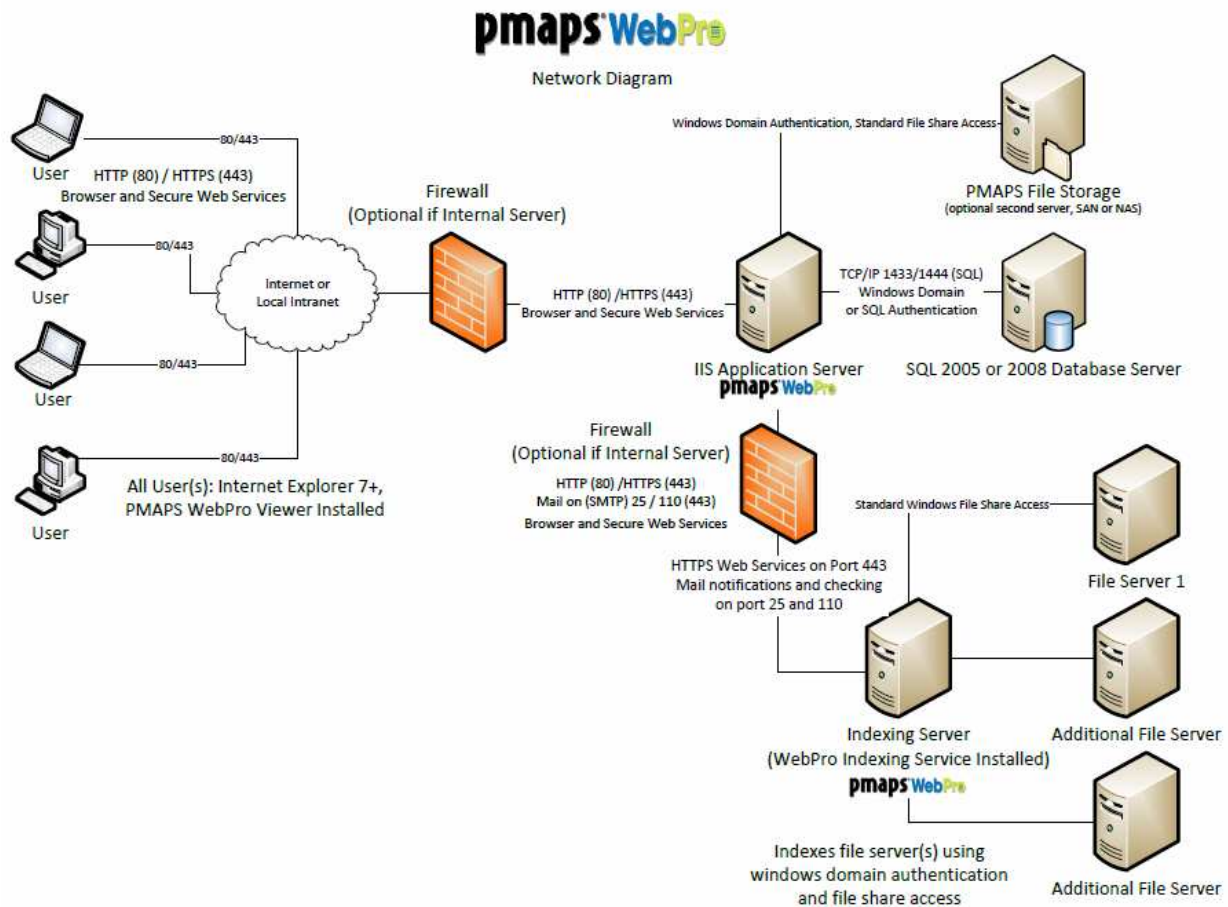
This document is referenced in the “PMAPS WebPro Installation Guide”.

**Your company is responsible for an operational and fully functioning IIS and SQL server environment.**

# PMAPS<sup>®</sup> WebPro Workflow



# PMAPS<sup>®</sup> WebPro Network Diagram



Ref: Priority1  
 Please start by creating a Windows Domain Account called PMAPS\_WebPro.  
 This domain account is used to run the application and will be granted rights along the way.  
 Verified By:

### Location of Initial Downloaded Application files

Ref	Requirements	Details	Value	Verified By
D1	Server name and path where original application ZIP files are stored	Location of original ZIP files		
D2	Password to unzip files	Password	NA	
D3	Server name and path where data files will be stored. This location needs to be accessible by the Web server and have Modify AD permissions for the PMAPS_WebPro Domain Account	Location of data files		

## SQL Server Requirements

Ref	Requirement	Details	Value	Verified By
S1	Server Name	Server Name		
S2	Server Domain Name	Server Domain Name		
S3	Server IP Address	Server IP Address		
S4	SQL Server 2005 (Server)	Version Number		
S5	Instance Name	Instance Name		
S6	Database Name	Name to be used for WebPro		
S7	SQL Server 2005 (Management Studio)	Confirmed	Installed <input type="button" value="Click to Confirm"/>	
S8	SQL Server 2005 (Full Text Indexing)	Confirmed	Installed <input type="button" value="Click to Confirm"/>	
S9	SQL Server 2005 (Agent)	Confirmed	Installed <input type="button" value="Click to Confirm"/>	
S10	SQL Server Reporting Services (SSRS) to run built-in reports.	Confirmed	Installed <input type="button" value="Click to Confirm"/>	
S11	All SQL Server Service Packs to date.	Service Pack Number		
S12	SQL Server account that will be used to create the database and/or run upgrades, must have adequate permissions.	Account Name (password optional)		
S13	It is recommended that you use the PMAPS_WebPro Domain Account for authentication for the SQL Server however you can use a SQL Server account that will be used to connect from the Web Server. This account must have dbowner rights to the database.	Account		
S14	SQL Server Contact Person. Person who has access to SQL Server performance monitoring tools. To be contacted to assist with SQL troubleshooting issues. This person should have access to tools necessary for troubleshooting including SQL Profiler. Must also have permission to perform database tuning. Person to contact to run SQL scripts.	Name / Phone		

Ref	Requirement	Details	Value	Verified By
S15	Directory where Full Text Index will be created	Path		
S16	<b>Note:</b> client is responsible for SQL recovery model and backups		<b>Confirmed</b> <a href="#">Click to Confirm</a>	

## Web Server Requirements


Ref	Requirements	Details	Value	Verified By
WW	Must turn off 'Automatically adjust for daylight savings time.' on all IIS servers.	Click for more details: <a href="#">Click here:</a>		
W1	Windows 2003 Server/Windows 2008 Server	Which Version of Windows		
W2	Server Name	Server Name		
W3	Server Domain Name	Server Domain Name		
W4	Server IP Address	Server IP Address		
W5	All Server Service Packs Installed	Service Pack Number		
W6	IIS (Version 6 or higher)	IIS Version		
W7	Processor Type	32 or 64 bit	32 bit 64 bit	
W8	Microsoft .NET 2.0 and 3.5 Framework Installed	Confirmed	Yes <input type="button" value="Click to Confirm"/>	
W9	.Net 2.0 Service Packs Installed (minimum SP2)	Service Pack Number		
W10	.Net 3.5 Service Packs Installed (minimum SP1)	Service Pack Number		
W11	All windows high priority updates installed using windows update	Verified Date		
W12	Port 80 Open	Confirmed	Yes <input type="button" value="Click to Confirm"/>	
W13	Port 443 Open (If SSL desired,443 should be open and certified as installed)	Using SSL?		
W14	Internet Explorer 7.0 (or higher)	IE Version		
W15	Web Site used to access WebPro from other computers. Ex: <a href="http://www.mysite.com">http://www.mysite.com</a> or <a href="http://internalserver/">http://internalserver/</a> or IP address.	http Address		
W16	Contact Person for Web Server issues. The person who will be responsible for maintaining the Web Server. This person will be contacted if web server troubleshooting is needed. They should have full access to IIS and the Web Server.	Name		
W17	Create an app pool and grant it the PMAPS_WebPro Domain Account.	Account		



Ref	Requirements	Details	Value	Verified By
W18	Physical location of web site root directory (generally inetpub\wwroot or custom folder)	Path		

## Primary Indexer Requirements

Ref	Requirement	Details	Value	Verified By
P1	Windows 2003 Server or Windows XP	OS		
P2	Server Name	Server Name		
P3	Server Domain Name	Server Domain Name		
P4	Server IP Address	Server IP Address		
P5	All Server Service Packs Installed	Service Pack Number		
P6	Processor Type	32 or 64 bit		
P7	Microsoft .NET 2.0 and 3.5 Framework Installed	Confirmed	Yes <input type="button" value="Click to Confirm"/>	
P8	.Net 2.0 Service Packs Installed (minimum SP2)	Service Pack Number		
P9	.Net 3.5 Service Packs Installed (minimum SP1)	Service Pack Number		
P10	All windows high priority updates installed using windows update	Verified Date		
P11	Internet Explorer 7.0 (or higher)	IE Version		
P12	Access to all directories (and websites) that are going to be indexed.	Confirmed	Yes <input type="button" value="Click to Confirm"/>	
P13	Ability to connect to Web Server.	Confirmed	Yes <input type="button" value="Click to Confirm"/>	
P14	Latest version of Adobe Reader	Version of Reader		
P15	Microsoft Office (must have the highest used Office version (in your organization) installed with all office applications and service packs for office installed. The minimum requirement for WebPro is Office 2003.)	Version of Microsoft Office		
P16	All office services packs to date	Service Pack Number		
P17	Contact Person for Indexer Server. This person should have permissions to add/remove/start/stop services on the Indexer Server. They will be contacted for installation and troubleshooting of the indexer.	Name		

Ref	Requirement	Details	Value	Verified By
P18	Set this Service to run under the PMAPS_WebPro Domain Account. Again, this account must have sufficient access to the Indexer machine. It must be able to logon to the desktop. The user must be able to run MS Office. The user must have access to all shares to be indexed. The user may need to be added to the local "Distributed COM User" group or the local "Administrators" group.	Account	PMAPS_WebPro	
P19	UNC Path's for any folders that you wish to setup for initial indexing	Path List (optional)		
P20	Firewall settings: All communication from PMAPS WebPro is using port 443. Please also make sure to allow access to this IP address as this is the email POP 3 on our server: 216.205.107.12:110.	Port 443	Configured  	
P21	WebPro Account Name for Indexer to Run.	This WebPro user account name will be used for the WebPro Indexer service to run.	WebPro_Indexer	
P22	WebPro Password for user Ref. D4 from above.	This WebPro user account password will be encrypted in both SQL (using "Hash" and during any Web Services.		

## Application Settings

These settings are needed when setting up the application. They will be configured in the SQL database under the dbo.ApplicationSettings table. All items should be filled in. Those prefilled with <Default> will already have default settings and do not need to be changed (although they can be).

Ref	Key Name	Description	Value
A1	Current Viewer Version	Current Version of the Viewer (updated any time a new release is installed)	
A2	DocumentCache (refer to D3)	Shared directory that the system uses to store the majority of its files.	
A3	DocumentTempDir (refer to D3)	Shared directory that the system uses to create temp files	
A4	POP3 Password	Password needed to check POP3	
A5	POP3 Port	Port used for POP3	
A6	POP3 Server	Server used for POP3	
A7	POP3 Username	Username (or email address) used for POP3 access	
A8	Proposal Directory (refer to D3)	Shared directory where proposals are stored.	
A9	ScanResultsEmailFrom	Email address where the Indexer scan results will be sent from	
A10	ScanResultsEmailSubject	Subject line for the email sent by the indexer after each scan	
A11	ScanResultsEmailTo	Email address of the person who will receive the Indexer results email	
A12	SmartCartDirectory (refer to D3)	Shared Directory where SmartCart items will be saved	
A13	SMTP Password	Password (if needed) for the SMTP server	
A14	SMTP Port	Port used for SMTP	
A15	SMTP Server	Server address used for SMTP	

Ref	Key Name	Description	Value
A16	SMTP Username	SMTP username (or email address) used for sending mail. Even if your SMTP does not require a authentication, please add any legitimate email address as the WebPro email requires this field to be completed.	
A17	Temporary Files (refer to D3)	Directory used for processing files. Should be shared directory	
A18	VerifyProcessUser	The username of a user that the verify process will run under	Administrator
A19	ReportingServerBase	Root path to the SQL Reporting Server Site	<Default>
A20	ReportingServerDomain	Domain for the SQL Reporting Server	<Default>
A21	ReportingServerFolder	Folder for the SQL Reporting Server Reports	<Default>
A22	ReportingServerMainPage	Main URL for the SQL Reporting Server Site	<Default>
A23	ReportingServerPassword	Password to log into SQL Reporting Server	<Default>
A24	ReportingServerUserName	Username to log into SQL Reporting Server	<Default>
A25	ComplianceRequestEmailBody	Body of email sent when a request for compliance is made	<Default>
A26	ComplianceRequestEmailSubject	Subject of email sent when a request for compliance is made	<Default>
A27	Compliant Color	Color for compliant docs	<Default>
A28	Current Viewer Download 2003	Downloadable location of 2003 Viewer	<Default>
A29	Current Viewer Download 2007	Downloadable location of 2007 Viewer	<Default>
A30	Expired Color	Color for expired documents	<Default>
A31	Help	URL Link to help files	<Default>
A32	NonCompliant Color	Color for non-compliant files	<Default>
A33	PerBid Color	Color for per-bid files	<Default>
A34	ProposalTabEvaluation	Text for the proposal Evaluation tab	<Default>
A35	ProposalTabFollow Up	Text for the proposal Follow Up tab	<Default>

Ref	Key Name	Description	Value
A36	ProposalTabLogistics	Text For the proposal Logistics tab	<Default>
A37	ProposalTabMarketing	Text for the proposal Marketing tab	<Default>
A38	ProposalTabMisc	Text for the proposal Misc tab	<Default>
A39	ProposalTabSummary	Text for the proposal Summary tab	<Default>
A40	QATabAttributes	Text for the document Attributes tab	<Default>
A41	QATabForms	Text for the document Forms tab	<Default>
A42	QATabHistory	Text for the document History tab	<Default>
A43	QATabNotes	Text for the document Notes tab	<Default>
A44	QATabRelated	Text for the document Related Tab	<Default>
A45	QATabRevisions	Text for the document Revisions Tab	<Default>
A46	Check Interval	Interval (in minutes) that the indexer will wait before checking for new files	15
A47	AmyUni Key	Internal	n/a
A48	AmyUni Printer	Internal	n/a
A49	AmyUni User	Internal	n/a
A50	FoxPro Word Docs	Internal	n/a
A51	FoxProConnection	Internal	n/a
A52	LastUsedDocumentID	Internal	n/a
A53	Performance Monitoring	Internal	n/a
A54	RegKey	Internal	n/a
A55	BaseURL	Internal – Load Balancing	n/a
A56	SurppressNewVersionAlert	Suppress the prompt which checks for new versions using the local users Viewer Version vs the value in Ref: A1	<Default>

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