

Proficient™

Information Technology Checklist

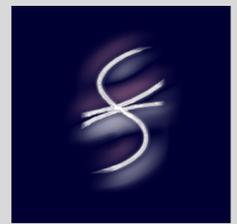
April 2018

For Proficient 8 and Later

Summary

Your Proficient Project includes a software database component. Proficient requires FileMaker Server and FileMaker Pro clients. It can run under Windows or Mac OS X. This checklist is designed to help businesses looking to start a Proficient Project to ensure that their information technology meets the requirements to run Proficient. The specifications shown here are the *minimum* required to ensure satisfactory performance and security of Proficient.

Also included are recommendations for additional equipment or enhanced specifications that, if followed, will improve the performance and reliability of all business technology, and also enhance Proficient user experience.



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	Advice Required	OK
<p>Server</p> <p>At least one computer in the business must be designated as a Server.</p> <p>The following server capabilities are required:</p> <ul style="list-style-type: none"> - Administrator access (for System setup and maintenance) - Backup (for databases) <p>Minimum requirements for FileMaker Server installation for Proficient are:</p> <p>Processor: Quad Core CPU Memory: 16GB Disk Space: 100GB Free</p> <p>Operating System Requirements:</p> <p style="padding-left: 40px;">macOS 10.13</p> <p style="padding-left: 40px;">Windows Server Standard 2016 w/Desktop Experience Windows Server 2012 R2 Standard (+ KB2919355)</p> <p>Server operating system must be fully updated with all vendor recommended updates and patches before Proficient server can be installed. Windows Update must be TURNED OFF.</p> <ul style="list-style-type: none"> - Windows Small Business Server is not supported. - Sophos Antivirus products are not supported. <p>FileMaker Server should not be installed on any server providing mail server, remote desktop, terminal services or Citrix access to multiple users.</p> <p>Disk indexing must be turned off.</p> <p>Antivirus software must except the entire FileMaker application directory and any database backup locations.</p> <p>TCP Ports 80, 443, 5003 and 16000 must be open for two-way traffic.</p> <p>A user account with local administrator rights is required.</p> <p>This user name must be: proficient.server</p> <p>We will set a strong password for this user account according to our scheme.</p> <p>TeamViewer Host will be installed on this Server for monitoring purposes. No other version of TeamViewer can be running on the server.</p> <p>Strongly recommended for Server Computers:</p> <ul style="list-style-type: none"> - Exceeding the Recommended System Specifications for FileMaker Server: https://www.filemaker.com/products/filemaker-server/server-16-specifications.html - For temporary processing of files during migration free space equivalent to 1.5 times the total storage allocation of any data to be migrated to or stored on Proficient Software (may be external hard drive for temporary processing of files). For ongoing database hosting, 100GB is recommended. - 4 or more core processor. - Separate server Grade SSD Array in RAID 1 for FileMaker Server and databases. - RAID 5+ HS, RAID 10 or RAID 1 + HS (Hot Spare) Hard Disk Redundancy for document storage, multiple arrays if required. 10k RPM +. 	<input type="radio"/>	<input type="radio"/>

<ul style="list-style-type: none"> - Single partition on physical system volume to accommodate FileMaker Server's storage location on the C: drive. - Replication, Hard Drive or Flash RAM based backup strategy (tapes are not recommended), with verification. - Suitable backup strategy may incorporate online, redundant, offline and offsite components. - Business-grade Antivirus software (Windows only). - Business-grade uninterruptable power supply with server control. - Separate, 24-hour climate controlled location for Server and Network equipment. <p><i>Sheldon King Consulting can assist in co-ordinating suppliers and contractors to bring your business up to these minimum requirements and recommendations.</i></p> <p>Any changes or upgrades to software or agents running on this server must be approved before being applied. If a server restart is required, this must be done in tandem with a shutdown of FileMaker server which we can perform by agreement,</p>		
<p><i>Proficient is ideally suited to Virtual Server technology environments and those using Windows Terminal Services or Citrix. Some recommendations are included below, however this is not an exhaustive list. Please call to discuss specific requirements for these types of server.</i></p> <p>Strongly recommended for Virtual Environments:</p> <ul style="list-style-type: none"> - Virtual servers hosting FileMaker Server must meet or exceed the Recommended System Specifications for FileMaker Server. - SSD Drives in RAID 1 are recommended for storing the operating system, applications and databases for FileMaker server. These should be configured as a discrete storage pool and be available exclusively to the virtual server hosting FileMaker. Their capacity will depend on the choice of operating system, anticipated database size and backup strategies, but a minimum of 120GB is recommended. - Where hardware will be hosting additional virtual servers that is providing any type of remote access services on a regular basis, the virtual machine hosting FileMaker Server must be provisioned with a dedicated storage pool. - Replication-style backups are suggested. See Disaster Recovery documentation for appropriate method of restoring Proficient databases subsequent to a server failure. <p>Client Desktops and Laptops</p> <p>Each user accessing Proficient will require access to a device capable of running FileMaker Pro.</p> <p>Minimum requirements for FileMaker Pro desktop installation for Proficient are:</p> <p>Processor: Dual Core CPU 1.2GHz + Processor Memory: 4GB (64 Bit Desktops Only) Disk Space: 15GB Free</p> <p>Operating System: macOS High Sierra (10.13) Windows 10 Pro/Enterprise + Fall Creators Update For Windows 8, please request compatibility details for your environment.</p> <p>In addition, the following are required:</p>	○	○

<ul style="list-style-type: none"> - Adobe Reader (Freely available) (Windows Only) - TCP Port 5003 must be open for two-way traffic. <p>Monitor resolution must be a minimum of 1280x1024. Regardless of size, display resolution must be set to native resolution (ie 1:1 pixels to display resolution), and Windows Standard theme is suggested for Windows installations for best use of available screen space.</p> <p>Proficient does not require Microsoft Office, but it may be used if available. Word processing, spreadsheet and other productivity tools should be selected to meet individual needs.</p> <p>Strongly recommended for Client Computers:</p> <ul style="list-style-type: none"> - Exceeding the Recommended System Specifications for FileMaker Pro http://www.filemaker.com/products/filemaker-pro/pro-16-specifications.html - Windows 10 Professional or Enterprise for Windows installations - Centrally managed Business-grade Antivirus Software (Windows Only). - Group Policy preventing Application Removal (Windows Only). - E Mail Access (for automated E Mail features). - Internet Access (for embedded online features). <p>Remote Desktop Services Supported Methods</p> <p>Remote Access: Citrix XenApp 7.14 Windows Server 2016 With Desktop Experience Windows Server 2012 R2Remote Desktop Services</p> <p><i>Sheldon King Consulting can assist in working with suppliers and contractors to bring your business up to these minimum requirements and recommendations.</i></p>		
<p>Group Policy (Windows Only)</p> <p>The following registry key values are required to be set once at startup or login for each user:</p> <p>Set HKCU\Software\FileMaker\FileMaker Pro\n.0\Preferences\Cache Size to 40000 (DWORD Hex) for 256MB (recommended) or 20000 (Hex) for 128MB</p> <p>Set HKCU\Software\FileMaker\FileMaker Pro\n.0\Preferences\User Name (SZ) to %username%</p> <p>Set HKCU\Software\FileMaker\FileMaker Pro\n.0\Preferences\Font Smoothing to 2 (DWORD Hex)</p> <p>Set HKCU\Software\FileMaker\FileMaker Pro\n.0\Preferences\Show QuickStart Screen to 0 (DWORD Hex)</p> <p><i>Please verify the version of FileMaker Pro that will be running to ensure the correct keys are created/updated.</i></p>	○	○
<p>Networking</p> <p>Proficient is a networked database. Any computer accessing Proficient will do so via a network.</p> <p>The minimum requirements for Networking are:</p> <ul style="list-style-type: none"> - Professionally installed and tested Cat 5e or better cabling in good order. - A business-grade gigabit network switch 	○	○

<ul style="list-style-type: none"> - Structured cabling. - Injection terminated Ethernet patch leads with integral flex-guards (no custom made leads). - Note that access via a wireless network is not recommended. <p>Strongly Recommended for Networking:</p> <ul style="list-style-type: none"> - Network cable testing a minimum of once every 6 years (4 years in coastal locations). 		
<p>Broadband Internet</p> <p>Internet access is required for support and many Proficient functions, including updates.</p> <p>Minimum broadband requirements are:</p> <ul style="list-style-type: none"> - Reliable "High-speed" ADSL 2+ or VDSL (24000/1024) - <p>Strongly recommended for Broadband:</p> <ul style="list-style-type: none"> - Ultra High-Speed Broadband (NBN) if available. - Business-grade DSL Router - Dedicated line for DSL (no other equipment on line) 	○	○
<p>Additional Requirements for Windows Server Environments</p> <ul style="list-style-type: none"> - Short file name generation must be disabled on document storage volume. - It must be possible to except FileMaker Server, FileMaker Pro from any data scanning software (such as virus scanner, firewall, imaging and shadow backup). - The FileMaker server must not be subject to periodic or timed restarts. - No other software (including backup software) should access the FileMaker database folder whilst Server is running. 	○	○
<p>Mobile (Draft Only)</p> <p>Proficient Mobile has the following requirements:</p> <ul style="list-style-type: none"> - iPad 3 and later - iOS11 or later - FileMaker Go (Freely available from the App Store) - Active e mail setup - Wireless internet access (Wi-Fi for office sync, 4G LTE for field sync) - VPN connection for secure synchronisation <p>Strongly Recommended for Mobile:</p> <ul style="list-style-type: none"> - Securing iOS device using via a mobile device management platform or a deployment profile - Remote wipe capability 	○	○

<p>Message</p> <p>Proficient Message has the following additional requirements:</p> <ul style="list-style-type: none"> - A POP e mail account with a secure password - Web based access to the account (for verification purposes) - Pre-delivery antivirus and spam scanning - Ports open for Mail on the server hosting Proficient: <ul style="list-style-type: none"> POP (SSL): 995, 465 POP (No SSL - not recommended): 110, 587 - Access to the Proficient Documents Folder that is identical to that of clients (P: drive, or via UNC \\Server\Share), where the proficient.server user has FULL CONTROL of this folder. If the location is a mapped drive, this drive must be mapped by Group Policy at the Machine level so that the location is available to the Server even when it is not logged in. - Permission for the proficient.server user to be able to run processes. 	○	○

In consultation with our IT Services Provider, we have determined that our organisation has the appropriate IT infrastructure to support Proficient. I/we understand that any shortcoming or omission in IT setup could delay the implementation of our Proficient Project/impair system performance and may result in additional consulting or technical costs being incurred.

Company Name _____

Signature of Owner(s) _____

Name of Owner(s): _____

Date ____/____/20__