RE: IT Requirements for Momentum and MYOB EXO Software

The purpose of this document is to provide important information about the IT environment and deployment of MYOB EXO Software. We hope this document assists IT professionals in managing an environment in which EXO can operate and understand key aspects of the deployment of EXO software.

Latest MYOB Release Notes should be reviewed prior to installing any MYOB EXO Software.

Typically Momentum is responsible for the installation and configuration of MYOB EXO Business software. The client's internal or external IT resources are responsible for Server, PC and network configuration, and the installation of Microsoft SQL Server. In some cases the client's IT representative may manage the software installation in conjunction with our consultant.

Our consultants endeavour to work closely with the client and IT representatives to ensure the correct environment and installation of MYOB EXO Business are achieved.

Pre-Installation Tasks

Release Notes for the latest Exo Versions are available on the Exo Education Centre:-
Exo Business   http://help.myob.com.au/exo/

Exo Employer Services (Payroll)   http://help.myob.com.au/exo/index_esau.htm

System Requirements – Hardware & Operating System
System requirements are available from MYOB at:-
http://help.myob.com.au/exo/sysreqs.htm
http://help.myob.com.au/exo/sysreqs_es.htm

Server Settings and Deployment of Software

Remote Access
Momentum Software Solutions require remote access to the server where MYOB EXO Business and MS SQL Server will be installed. Preferably this is via a Remote Desktop Connection. From the remote desktop connection we require access to the internet and ftp (for downloading program updates) and read/write access to server folders. In order to install the software Momentum will require 'Admin Rights' to the server. After the installation is complete this can be adjusted to Full Permissions on the 'EXO' folders.

Server Account for scheduling tasks.
Momentum require an account which can be used to schedule tasks on the server. The default account Momentum uses is the SYSTEM account but we are flexible where you wish to discuss with your IT provider to provide an account and password for Momentum to use. This account must have sufficient privileges to read and/or write to the EXO and (if applicable) Payroll folders.

Installation of MS .Net 4 Framework
Momentum commonly install custom utilities that require the .Net 4 Framework. This needs to be installed on the Server and all Client PC's.

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Data Execution Prevention (DEP)
DEP settings have interfered with the Exo programs in some circumstances so we recommend DEP be turned off / disabled. Alternatively all the Exo programs should be excluded from DEP.

Email Server Settings
In order for MYOB EXO Payroll to successfully email payslips the following settings are required on the email server:-
Email Server   To use the payslip emailing function you must have access to a Simple Mail Transfer Protocol (SMTP) Server. If your company has a Local Area Network (LAN), it is probable that it will have an internal SMTP server, as provided by your Network Administrator. The SMTP server must be configured with an internal relay connector to allow the relaying of internal and external mail from the IP addresses of the Payroll and Exo users. Normally the mail connector will be configured to accept messages from the whole scope of the LAN, you can if you wish however restrict it by IP address as long as all Payroll, Exo users and the Exo application server are given access. If you do not have an SMTP server, you can use an internet-based SMTP Server that provides for relaying of emails, e.g. Telstra's Bigpond service. There may be limits or restrictions enforced by your ISP for using their SMTP server.

Common Deployment Methods
Exo is a Client / Server application. Exo runs very efficiently on a LAN, and depending on the client's remote access needs also runs efficiently on a Terminal Server.

Note: If using Exo on Terminal Server users also need to run Outlook on Terminal Server in order for email integration to work.

We do not recommend deploying Exo as a published application.

Microsoft Office
Microsoft Office connection requires Microsoft Word/Excel 2010 to 2016 (MS Office 32 & 64 bit)
Contact synchronisation requires Microsoft Outlook 2010 to 2016 (MS Office 32 & 64 bit)

Database Requirements
Installation of MS SQL Server
MYOB EXO Business – all modules
Microsoft SQL Server 2014 (preferred) or SQL Server 2012 Service Pack 2 needs to be installed on the Server. MS SQL Server Express may be used for smaller sites (less than 5 users). MS SQL Server Management Studio is also required.

SQL Server needs to be installed in mixed authentication (Windows & SQL) mode. Remote Connections needs to be enabled, and the SQL Browser service running.   SQL Connection Test – after installing SQL please test that a User PC can connect to SQL Server. An easy way to test this is by adding an external data source to MS Excel.

Momentum requires the Server Administrator (SA) Username and Password as these are used by MYOB EXO Business to connect to the database.

MYOB EXO Employer Services
MYOB EXO Employer Services is built on a Visual FoxPro platform, and as such does not require an SQL Database Application for operation. All application and database components are installed by the installer.
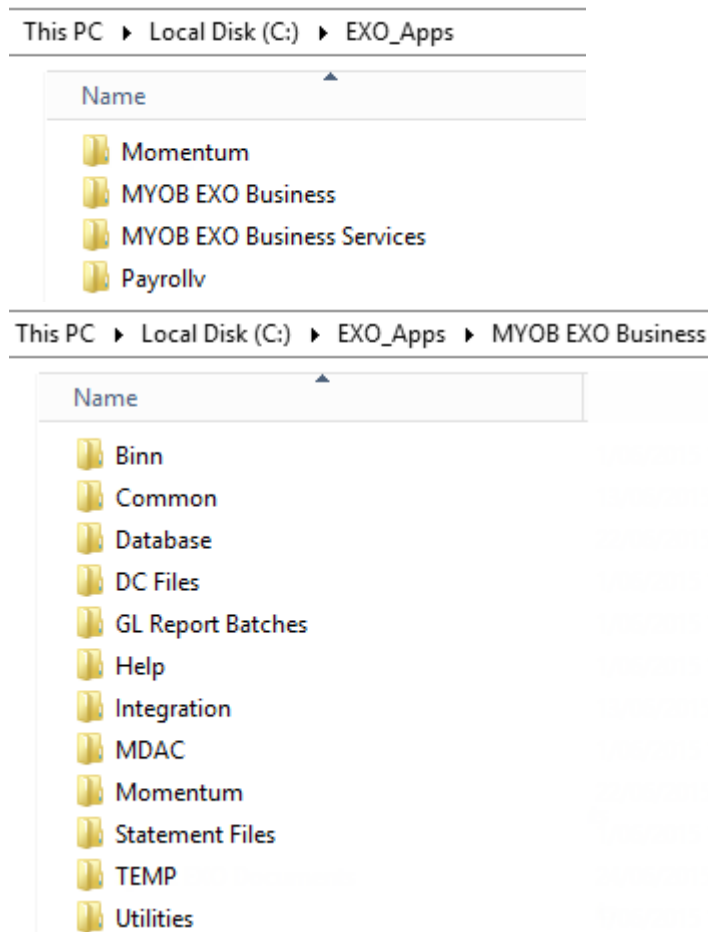
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Momentum Installation Tasks
Momentum usually install the MYOB EXO Applications although this process is relatively simple and can be performed by the IT Representative if preferred. Additional Utilities (Momentum EasyMaintenance) and agreed custom solutions will also be installed on the Server.

Server Installation
MYOB EXO Business will usually be installed on the server at C:\Exo_Apps\MYOB EXO Business. Two network shares named 'EXO' and 'EXOCOM' are created enabling users read/write/modify access to the MYOB EXO Business folder and sub-folders.

This PC ▸ Local Disk (C:) ▸ EXO_Apps

Name
- Momentum
- MYOB EXO Business
- MYOB EXO Business Services
- Payrollv

This PC ▸ Local Disk (C:) ▸ EXO_Apps ▸ MYOB EXO Business

Name
- Binn
- Common
- Database
- DC Files
- GL Report Batches
- Help
- Integration
- MDAC
- Momentum
- Statement Files
- TEMP
- Utilities

A number of DLL files are copied to C:\Windows\System32 (or SysWOW64) and registered.

MYOB EXO Employer Services (Payroll etc) will be installed on the server at C:\EXO_APPS\Payrollv. This folder and subfolders are created by the installer.

▸ This PC ▸ OS (C:) ▸ Exo_Apps ▸ Payrollv ▸

Name	Date modified	Type
Backup	11/07/2016 3:15 PM	File folder
Clarity Reports	11/07/2016 3:10 PM	File folder
DATABASE	11/07/2016 3:10 PM	File folder
DEMOMSS	11/07/2016 3:10 PM	File folder
Images	11/07/2016 3:08 PM	File folder
MYSTAFFINFO	24/02/2016 12:06 ...	File folder
Patches	11/07/2016 3:05 PM	File folder
rptimages	11/07/2016 3:08 PM	File folder

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Client Installation
Normal install for MYOB EXO Business is to create desktop shortcuts on the client to the executables on the server. Depending on number of Users and expected transactional volume MYOB EXO Business executables may also be installed on each client PC required to use the software. These would be installed at C:\EXO_APPS\MYOB EXO Business.

Each client connection to the database uses SQL authentication using the SQL Server Administrator Username and Password.

MYOB EXO Employer Services is installed on the Client by running Network.exe found on the server installation.

User Groups and Permissions
We suggest that 2 user groups be created and managed by the IT representative. 'EXO Business Users' should contain all domain users that will be EXO Business users. This group should have full permissions to the EXO and ExoCom shares. 'EXO Payroll Users' should only contain domain users that will be EXO Payroll users. This group should have full permissions to the Payrollv folder and subfolders.

Backups & DRP
For MYOB EXO Business a nightly backup will be scheduled via a utility (Momentum Easy Maintenance) or the SQL scheduler. The file location for the backups should be included in your nightly critical data backup set. We can agree on the preferred file location.

Momentum Easy Maintenance enables Users can backup 'Live' and copy to 'Test' on demand.

For MYOB EXO Payroll the backup is created on exiting the application and these files should be included in your nightly critical data backup set.

Management of Upgrades
MYOB EXO Business - Upgrades for EXO Business are generally managed by Momentum and sometimes performed by the Client, or Client IT Representatives depending on preference and level of customisation performed. Typically upgrade files are downloaded to the server, and EXO Programs and SQL Database are upgraded at an agreed time. All Users must be logged out for an upgrade to be completed. Basic functionality and printing of forms & reports is tested by Momentum and the client to confirm the upgrade had completed successfully.

MYOB EXO Employer Services (Payroll) – An Online Upgrade is available for this software. Users are able to perform the upgrade themselves provided they have sufficient server permissions to complete the upgrade. MYOB EXO Employer Services upgrades must be run on the server.

Clients are informed via email when upgrades are available, and detailed release notes are provided.

Known Installation Issues
Refer to the latest Release Notes for any known issues.

If you have any questions regarding this information please contact our support team on 07 5479 1877 or email support@momentumss.com.au . Additional information can be accessed on our knowledge base www.momentumsoftwaresolutions.com.au/support

Regards - Momentum Software Solutions

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Server / Client / Network Checklist

#	Task	Complete
1	Remote Access for Momentum setup & tested	
2	MS SQL Server + SQL Server Management Studio installed (Mixed authentication mode, sa details provided)	
3	.Net 4 Framework installed (Server & PC's)	
4	Email Server – anonymous relaying enabled	
5	MS Office versions verified/upgraded for EXO users (2007 – 2016)	