



# Installation Instructions

Expere® Dynamic Document Solutions  
Lending

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March 2019



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## Introduction

The installation of Expere DDS includes options for either a standalone installation or a service bureau installation. Service bureau allows multiple, unaffiliated financial institutions to access and use the same installed instance of Expere DDS, maintaining separation between the data related to each financial institution. The standalone server installation supports the use of Expere DDS within a group of affiliated financial institutions.

The installation of Expere DDS as a standalone server includes:

- Organization Policy Setup Application, OPSA. Use this browser-based application to setup and manage financial organization hierarchies, lending policy requirements, set up ARM/HE policy, and post organization and lending policy data, ARM program data, and HE plan data to the Expere DDS server.
- The compliance and document Knowledge Base, the KB. This contains all of the documents and business rules to tailor document sets to the unique requirements of each transaction and jurisdiction.
- Web Services, .NET-based, for working with transaction and organization data to generate transaction document sets.
- The Alternate Text Editor. For instructions on starting and using the editor, please see its user guide, *ExpereDDS\_AlternateTextEditor\_UG.pdf*.

The installation of Expere DDS to service bureau/data center servers includes:

- Data Access & Enterprise Services. The web services necessary to work with transaction and organization data to generate transaction document sets in a service bureau environment.
- Knowledge Base, Organization, and Transaction Services. All of the documents and business rules required to tailor document sets to the unique requirements of each transaction and jurisdiction.
- Organization Policy Setup Application, OPSA. Use this browser-based application to setup and manage financial organization hierarchies, lending policy requirements, set up ARM/HE policy, and post organization and lending policy data, ARM program data, and HE plan data to the Expere DDS server.
- The Alternate Text Editor. For instructions on starting and using the editor, please see its user guide, *ExpereDDS\_AlternateTextEditor\_UG.pdf*.

## Prerequisites

System hardware and software requirements are listed in the Expere DDS System Recommendations document, available on the SupportLine web site. The following are required for the installation of Expere DDS in standalone or service bureau servers:

- Due to security and performance risks, it is not recommended to install Expere DDS directly on a domain controller. If you do this, you may get an error message, or an error may appear in the log file under your %temp% directory, located here: Documents and Settings\[username]\Local Settings\temp. The error may state that some Contexts were not created properly, and Expere DDS will not run without these. If this occurs, you will need to call Supportline for assistance.
- Internet Information Services. For Windows 7, IIS 7.0 can be installed from Control Panel, Programs, Advanced Options.

**Note:** If possible, IIS should be installed before the .NET 2.0 Framework. The .NET Framework installation registers with IIS.

If .NET is installed prior to IIS, then from the command-line, you must run *Aspnet\_regiis.exe -i* to register .NET with IIS. *Aspnet\_regiis.exe* can be found in the Framework folder, the default installation path being C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727. Also note the -i command-line switch. See <http://msdn2.microsoft.com/en-us/library/k6h9cz8h.aspx> for more information.

- Version 2.0 of the .NET Framework. The installation file for the .NET Framework, dotnet20.exe, is available in the Utilities\NET\_2\_0 folder on the Expere DDS Lending CD.
- Version 4.0 of the .NET Framework. You can obtain the 4.0 version from Microsoft's web site, a web install being available at <http://www.microsoft.com/download/en/details.aspx?id=17851> or you can download a standalone version at <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17718>. The .NET Framework 4.0 installation has a pre-requisite that the Windows Imaging Control must be present. You can find this at <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=32>. You must reboot after installing .NET Framework 4.0.

If you are running OPSA, you will also need the path to an existing Microsoft SQL server. If you do not have access to an existing SQL server, you can install SQL Server 2008 Express on the same computer as Expere DDS. The free download is available at <http://www.microsoft.com/en-us/download/details.aspx?id=1695>. On the same web page, SQL Server Management Studio Express is available for free download. This adds a GUI front-end to SQL Server Express to ease configuration chores.

**Note:** Web sites deployed on the same server as Expere DDS and using port 80 will not function properly and also interfere with the functioning of the Expere DDS web services. As such, we do not currently support deploying Expere DDS web services into web servers where other sites are configured to use port 80. We also do not currently support deploying Expere DDS web services into web servers that are running Microsoft SharePoint.

## Before You Begin

Be aware that this version is a major upgrade. As such, older Expere DDS versions will be automatically uninstalled.

**Note:** During the installation process Microsoft Internet Information Server (IIS) will be restarted automatically. This might impact any other application using IIS during the upgrade process.

Set to manual or disable any anti-virus software.

Ensure all of the prerequisite software is installed in the proper order.

**Note:** For a standalone server installation the Knowledge Base and Web Services components of the Expere DDS product must be installed on the same computer; they cannot be installed on separate servers. The OPSA module can be installed on a server separate from the Knowledge Base/Web Services components as can SQL server.

Administrative rights are required to install Expere DDS.

**Important:** The Expere DDS product cannot be installed or uninstalled remotely. Installation or uninstallation must be done from the server console.

Before installing XDDS, make sure the user who is installing XDDS is part of an Admin group within SQL 2008.

If you are installing the product on a machine that is running the Windows 7 or Windows 2008 operating system, you must select the "Run As Administrator" option when running the installation program.

## Windows 7 Checks

Additional checks are required if you are installing Expere DDS on Windows 7:

- Check that the following Internet Information Services Components are present:
  - IIS 6 Management Compatibility
  - IIS 6 Management Console

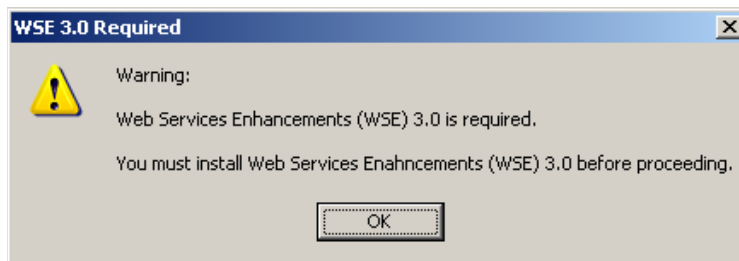
- IIS 6 Scripting Tools
- IIS 6 WMI Compatibility
- IIS Metabase
- IIS 6 Configuration Compatibility
- Within the Application Development Features under World Wide Web Services in Windows Features, check for the following services:
  - .NET Extensibility
  - ASP.NET
  - ISAPI Extensions
  - ISAPI Filters
- Check that Static Content is listed under Common Http Features

## Expere DDS Standalone Server Installation

1. Place the Expere DDS Lending CD into your CD-ROM drive.
2. From the root of the drive, double-click **setup.exe**.

**Note:** If you are installing the product on a machine that is running the Windows 7 or Windows 2008 operating system, you must select the “Run As Administrator” option when running the installation program.

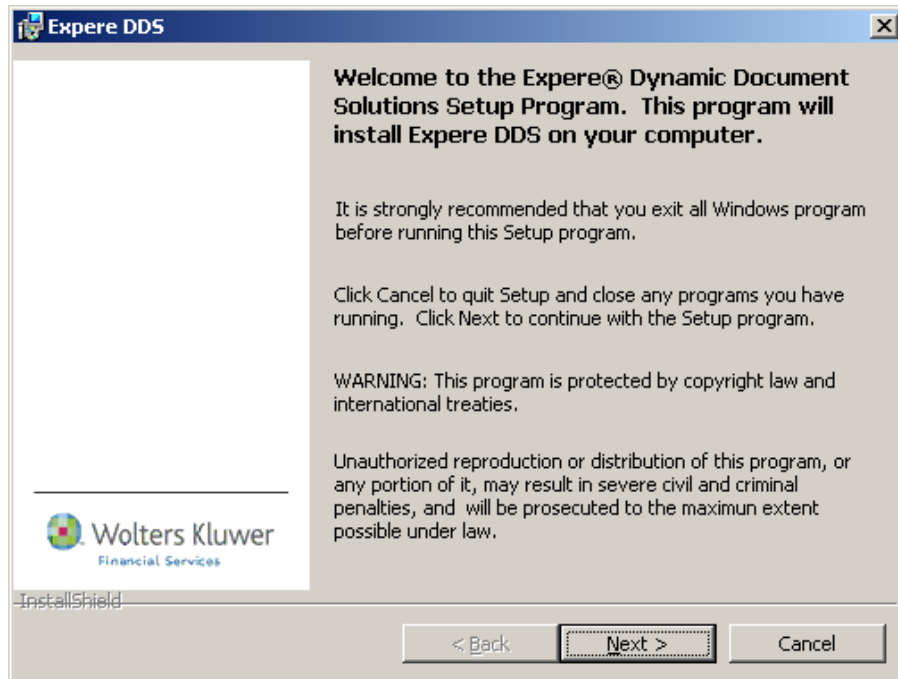
3. Setup will check that all prerequisite programs are installed. If one is missing, you will be notified.



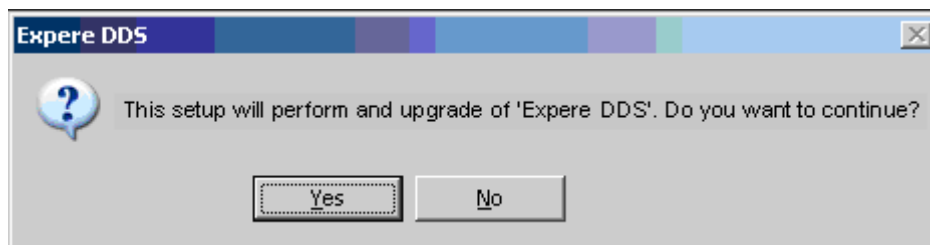
4. Click **OK** to install prerequisite software as needed.

**Note:** The software for many of the prerequisites is available on the Expere DDS installation CD under the Utilities folder. You will also need to step through some installation screens for each piece of prerequisite software.

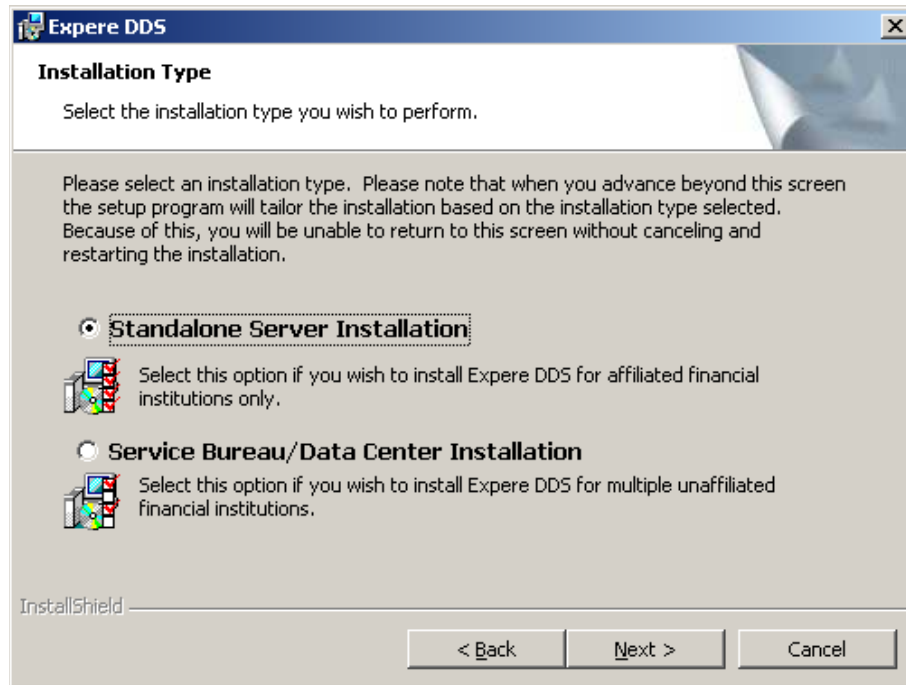
5. After the prerequisite software is installed, re-run **setup.exe** and you will see the Expere DDS Welcome screen.



6. The following message appears.

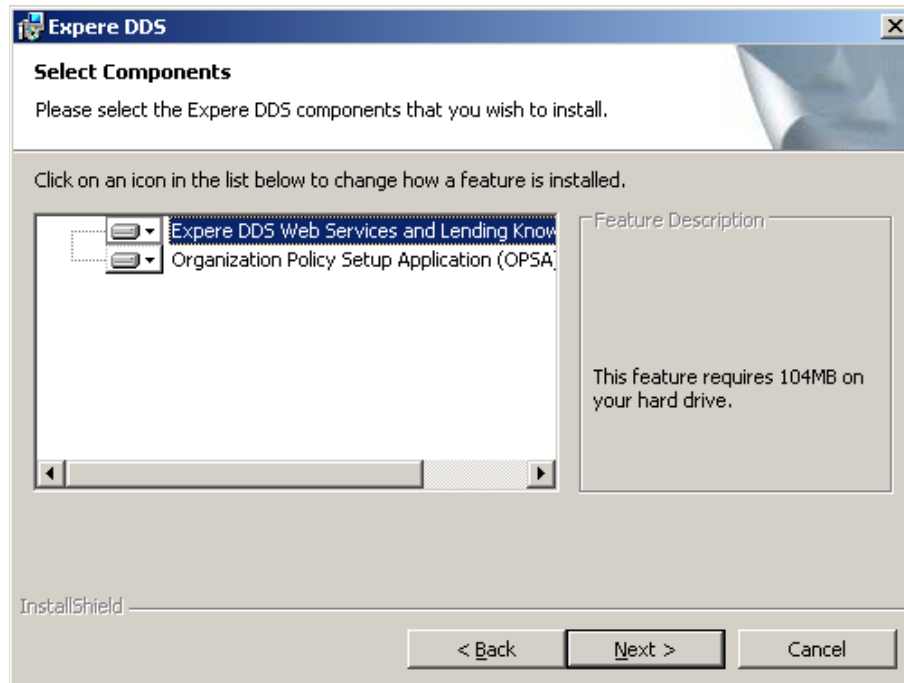


7. Click Yes to choose your installation type. Select the **Standalone Server Installation** for Expere DDS if all of the institutions using the server are affiliated with one another. If you want to install Expere DDS into a data center environment, proceed to [Expere DDS Service Bureau/Data Center Installation](#) later in this document.



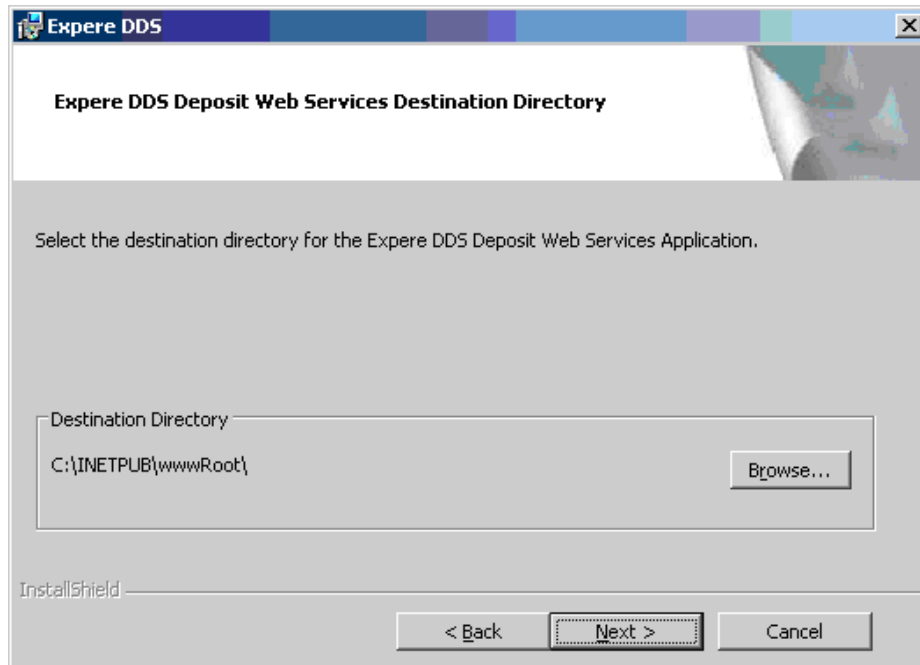
**Note:** Once you have selected your installation type and click **Next**, you will not be able to return to this screen. If you wish to change your installation type, you will need to click **Cancel** to leave the installation and restart the installation process from the beginning.

8. After you have selected a **Standalone Server** install, select the components to install. All components are installed by default.



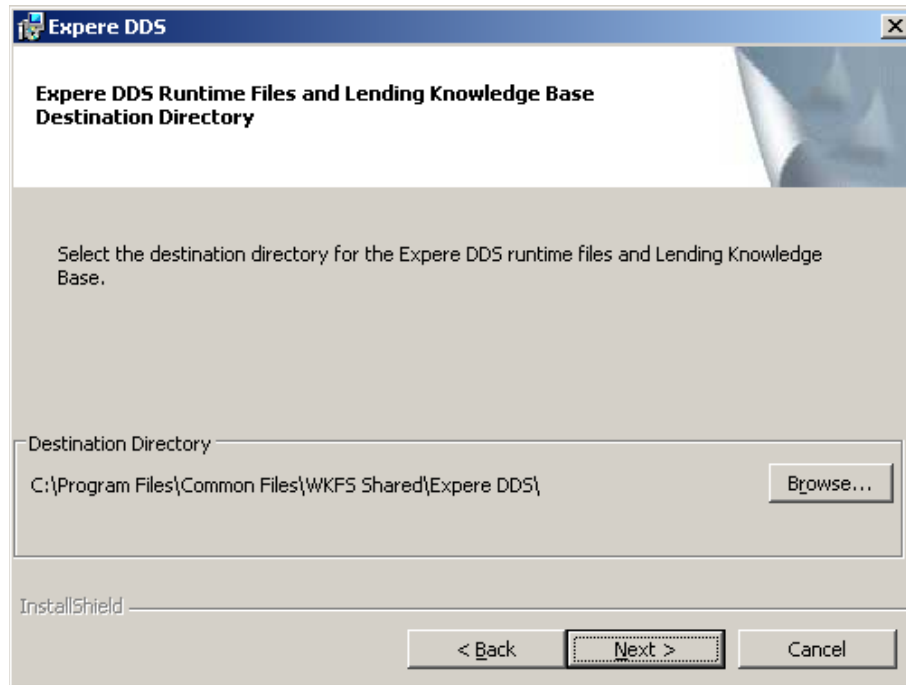
**Note:** If you choose to install OPSA on a separate server, select **"This feature will never be available"** for the OPSA option during the main server installation of the Knowledge Base and Web Services. After completing the main server installation, take the Expere DDS CD to the server, which will receive OPSA and choose **"This feature will never be available"** for the Web Services and the Knowledge Base components.

9. You will be asked for the path for Web Services. The default path is C:\INETPUB\wwwRoot\. The default path must be accepted for Expere DDS to function properly.



**Note:** You will **not** see the Web Services Destination Directory screen during an OPSA-only server installation, or if Expere Deposit is already installed.

10. After clicking **Next**, the Expere DDS Runtime Files and Lending Knowledge Base Destination Directory will be requested. The default path is C:\Program Files\Common Files\WKFS Shared\Expere DDS\.

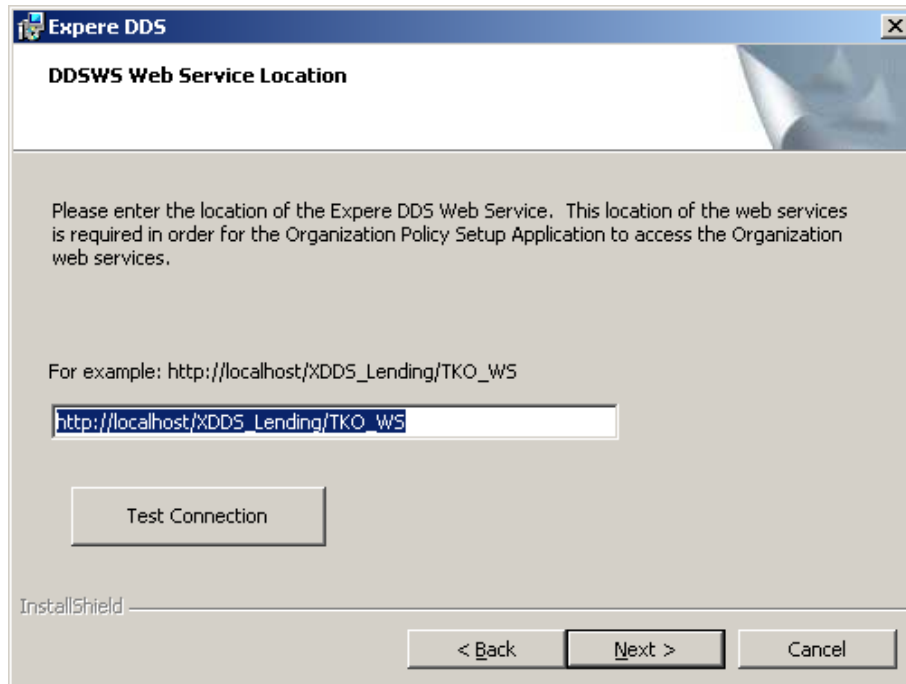


11. Indicate the Expere DDS OPSA Destination Directory. The default path is C:\INETPUB\wwwRoot\OPSA\.



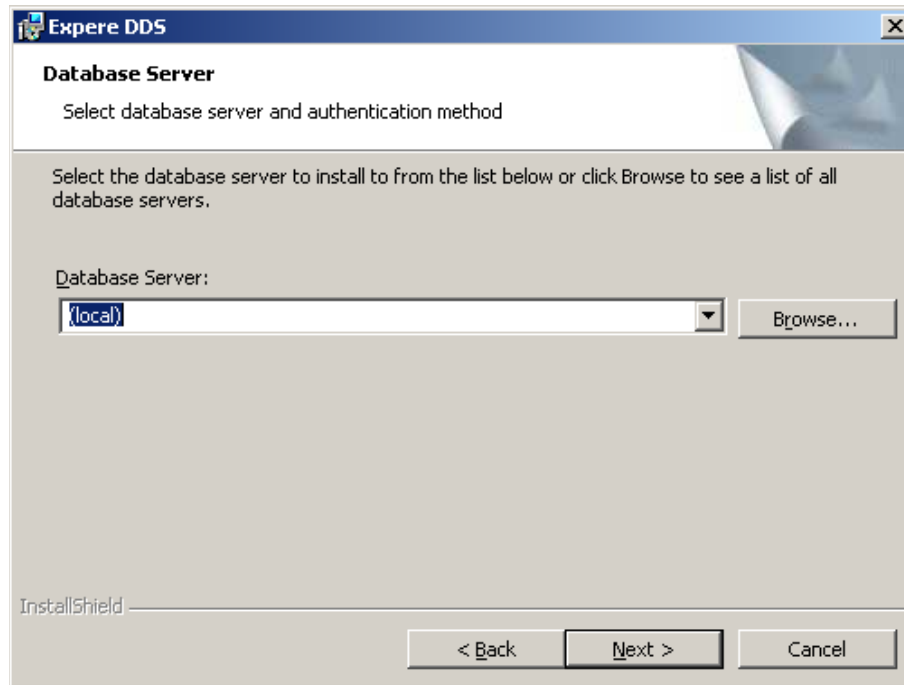
**Note:** If you are performing a custom install that does not include OPSA, you will not be asked for the OPSA path.

12. If you have chosen to install OPSA, clicking **Next** will allow you to select the path for the Web Services. The default path is `http://localhost/XDDS_Lending/TKO_WS`.



**Note:** If this is a new Expere DDS installation, clicking the **Test Connection** button will result in an error message that the Web Services cannot be found. You can proceed with the installation without a valid connection.

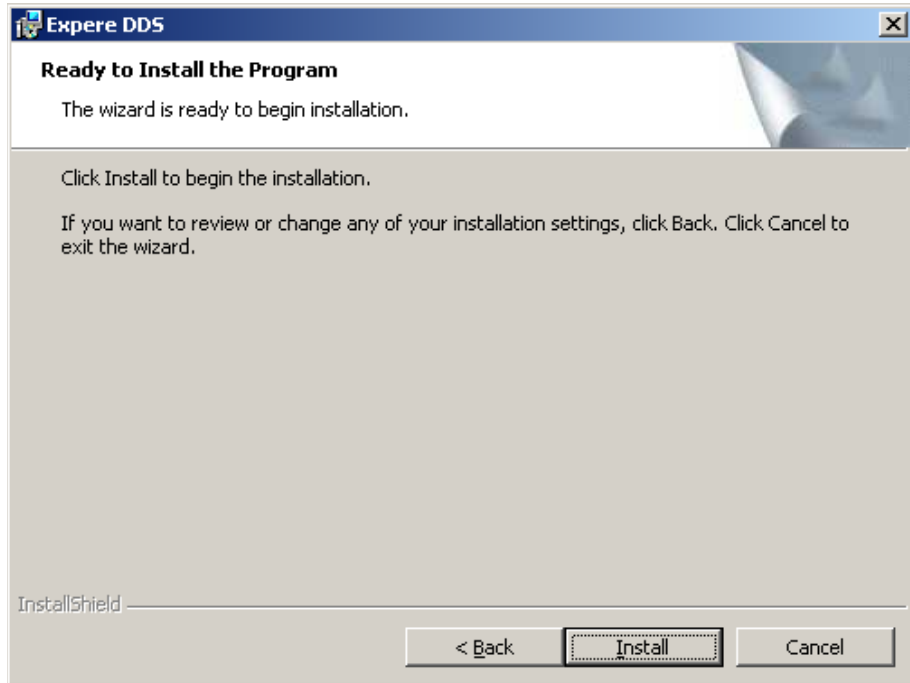
13. Click **Next**. If you are installing OPSA, you will be asked for the database server instance where OPSA will be installed. Choose a **Database Server** from the drop-down menu or click **Browse** to find a server.



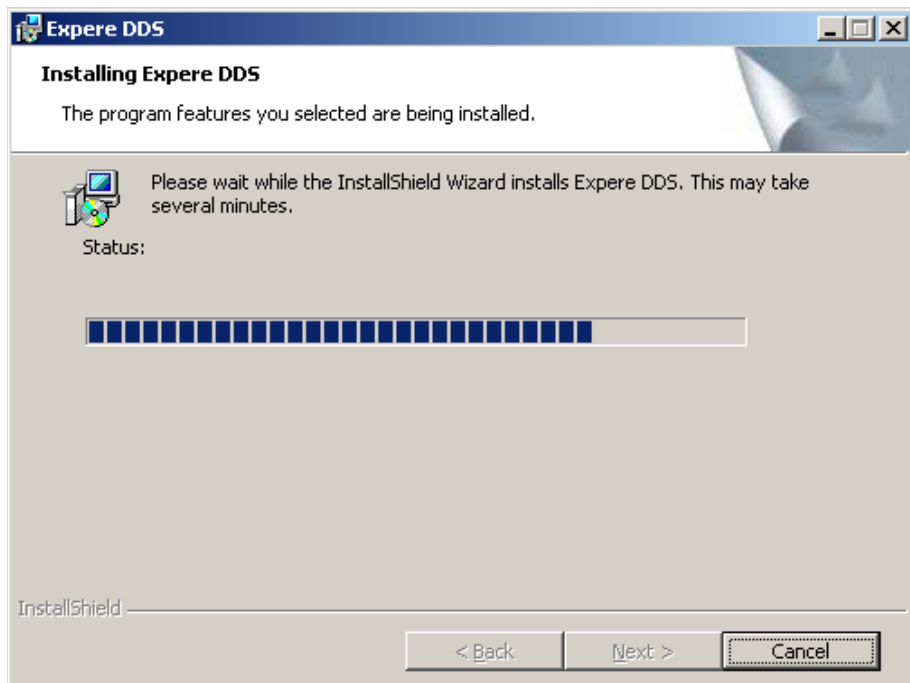
**Note:** The selected SQL server instance must be on the same machine as the OPSA web application. If you select a SQL server instance on a different machine, the installation fails, and you cannot use OPSA.

You will receive an 'unable to connect' error message when you click **Next** if the server specified does not exist. Click **OK** on the message and choose an existing SQL server.

14. Click **Next**. Expere DDS is now ready to install. Click **Install**.

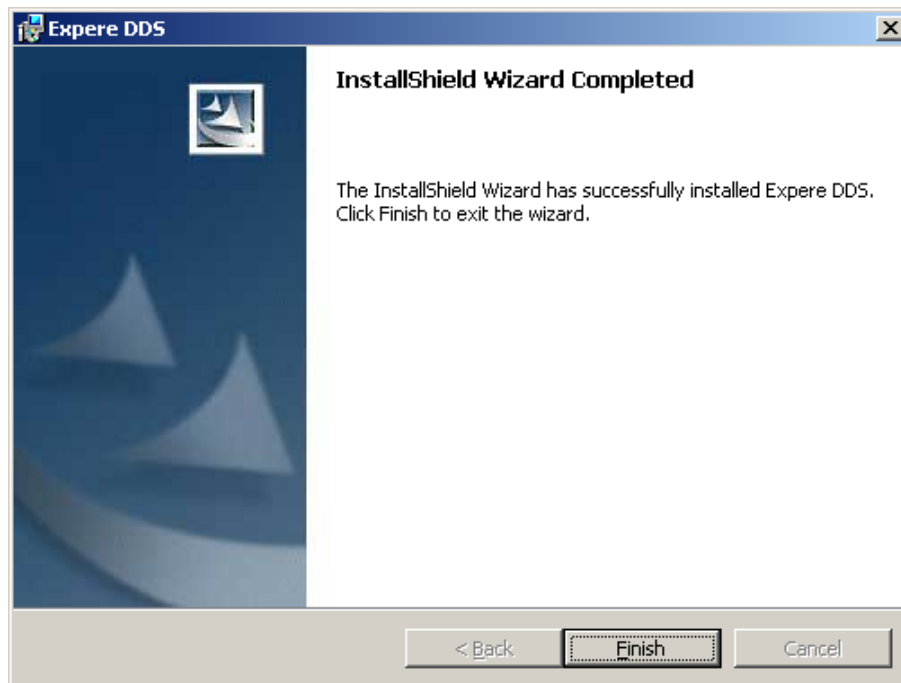


15. You will see progress on the progress bars as the installation proceeds.



**Note:** During the installation of Expere DDS, you may receive an error message about MDAC versions. The installation will not allow you to proceed and will stop. Please read the [MDAC Workaround](#) section later in this document for the solution.

16. If the installation is successful, you will see an Install Completed screen. Click **Finish** to complete the installation. No reboot is necessary.



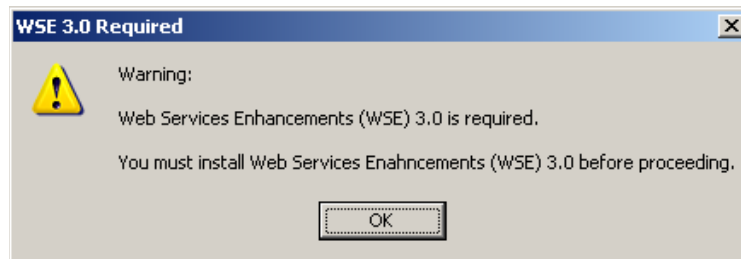
**Note:** If there are any errors during the installation, a log file is created under your %temp% directory, located here: Documents and Settings\[username]\Local Settings\temp. An example of the file name is: XDDS\_Error\_Log\_2008\_3.txt.

## Expere DDS Service Bureau/Data Center Installation

1. Place the Expere DDS Lending CD into your CD-ROM drive.
2. From the root of the drive, double-click **setup.exe**.

**Note:** If you are installing the product on a machine that is running the Windows 7 or Windows 2008 operating system, you must select the "Run As Administrator" option when running the installation program.

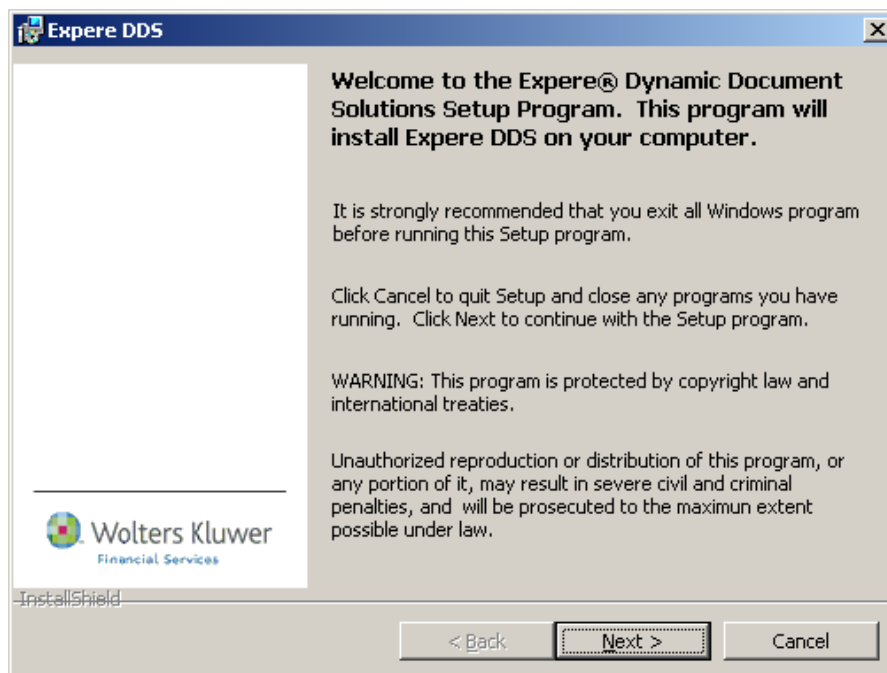
3. Setup will check that all prerequisite programs are installed. If one is missing, you will be notified.



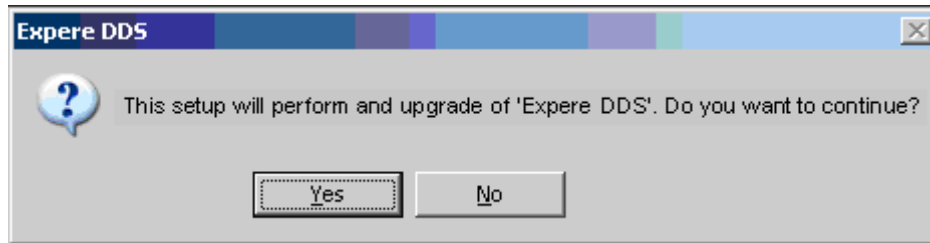
4. Click OK to install prerequisite software as needed.

**Note:** The software for many of the prerequisites is available on the Expere DDS installation CD under the Utilities folder. You will also need to step through some installation screens for each piece of prerequisite software.

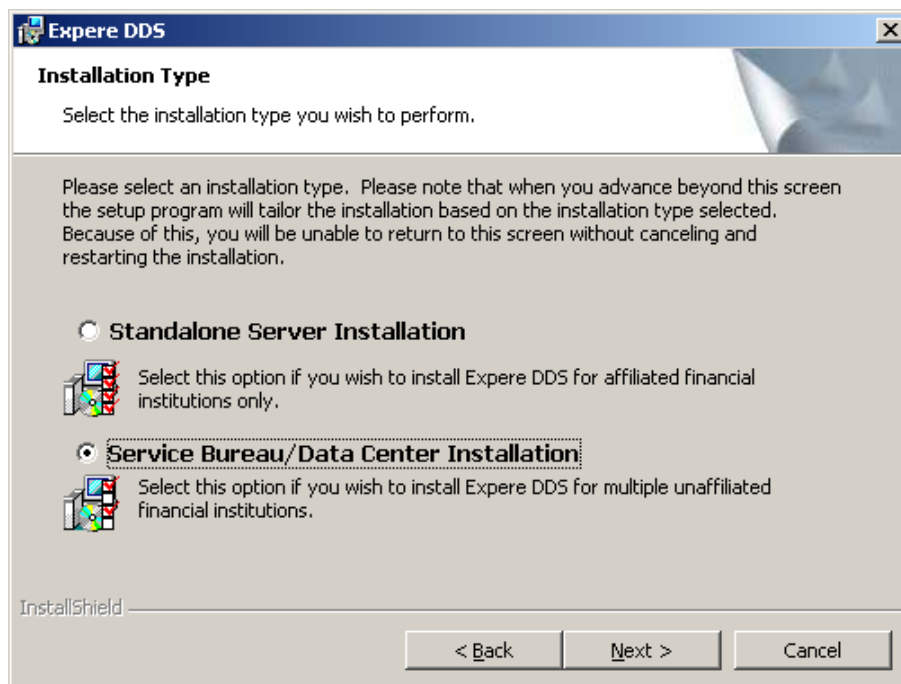
5. After the prerequisite software is installed, re-run **setup.exe** and you will see the Expere DDS Welcome screen.



6. If this is an upgrade, a message appears.

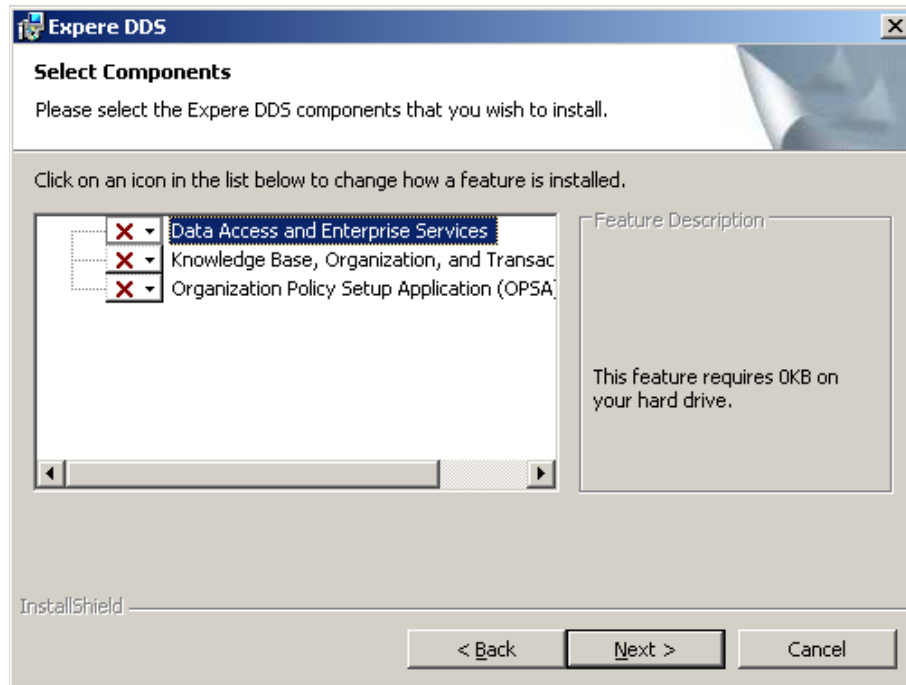


7. Click **Next** to choose your installation type. Select the **Service Bureau/Data Center Installation** for Expere DDS if multiple, different institutions or differing branches of the same institution are all accessing and using the same installed instance of Expere DDS.



**Note:** Once you have selected your installation type and click **Next**, you will not be able to return to this screen. If you wish to change your installation type, you will need to click **Cancel** to leave the installation and restart the installation process from the beginning.

8. After you have selected a **Service Bureau/Data Center** install, select the components to install. None of the components are installed by default to ensure maximum flexibility for installation within the service bureau environment.



It is recommended that you proceed with component installation in the order they are listed on the Components Screen:

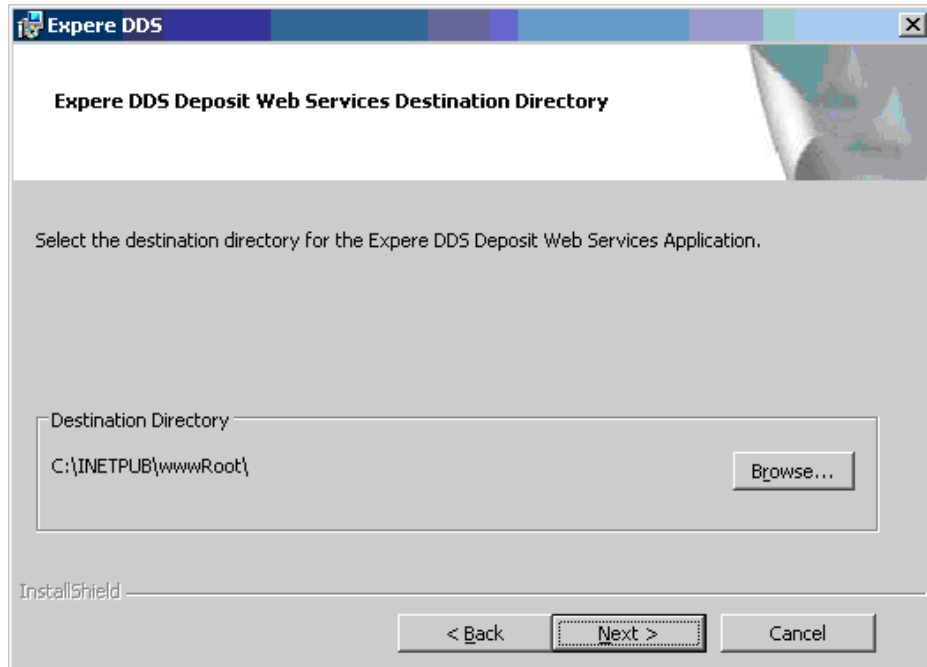
- Data Access & Enterprise Services
- Knowledge Base, Organization, & Transaction Services
- Organization Policy Setup Application (OPSA)

For instance, you may choose to install **Data Access & Enterprise Services**, **Knowledge Base, Organization, & Transaction Services**, and **Organization Policy Setup Application (OPSA)** all on separate servers. In this scenario **Data Access & Enterprise Services** is installed on a single web server and the other two components remain at “**This feature will never be available.**” After completing the **Data Access & Enterprise Services** installation, take the Expere DDS CD to the server which will receive **Knowledge Base, Organization, & Transaction Services**, choose the **Service Bureau/Data Center** installation type, and leave the **Data Access & Enterprise Services** and **OPSA** at “**This feature will never be available.**” Lastly take the Expere DDS CD to a third set of servers and choose only to install **Organization Policy Setup Application (OPSA)**. Some notes on this scenario:

- The web server hosting the **Knowledge Base, Organization, & Transaction Services** can be replicated to meet your performance requirements. Depending upon your performance needs, there could be anywhere from 2 to 20 or more replicated web servers. Also note that server replication is to be performed outside of product installation and is truly independent of the Expere DDS product since it is a task performed at the service bureau.
- **Organization Policy Setup Application (OPSA)** may be installed to a dedicated server or it can be installed on either the **Data Access & Enterprise Services** or the **Knowledge Base, Organization, & Transaction Services** servers, as long as the server selected for

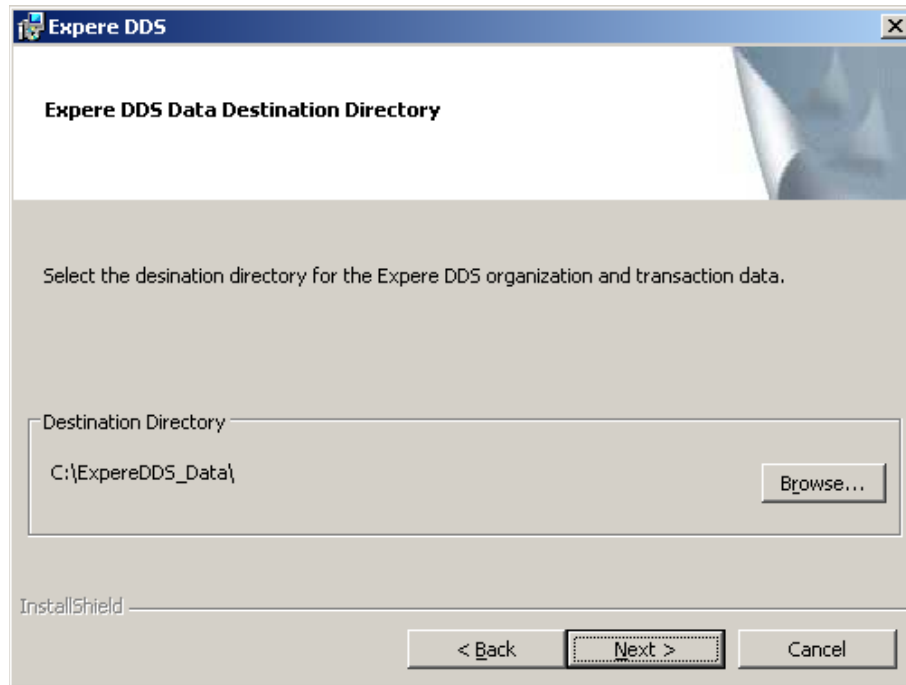
the OPSA installation has access to the server hosting the Knowledge Base, Organization, & Transaction Services component.

9. Choose to install at least one component and click **Next**. Depending upon the component(s) selected your next choice will vary:
  - Steps 9 and 10 include installation details for the **Data Access & Enterprise Services** component
  - Steps 11 and 12 include installation details for the **Knowledge Base, Organization, & Transaction Services** component
  - Steps 13, 14 and 15 include installation details for the **Organization Policy Setup Application (OPSA)** component
10. If you selected the **Data Access & Enterprise Services** component, you will be asked for the path for Web Services. The default path is C:\INETPUB\wwwRoot\. The default path must be accepted for Expere DDS to function properly.

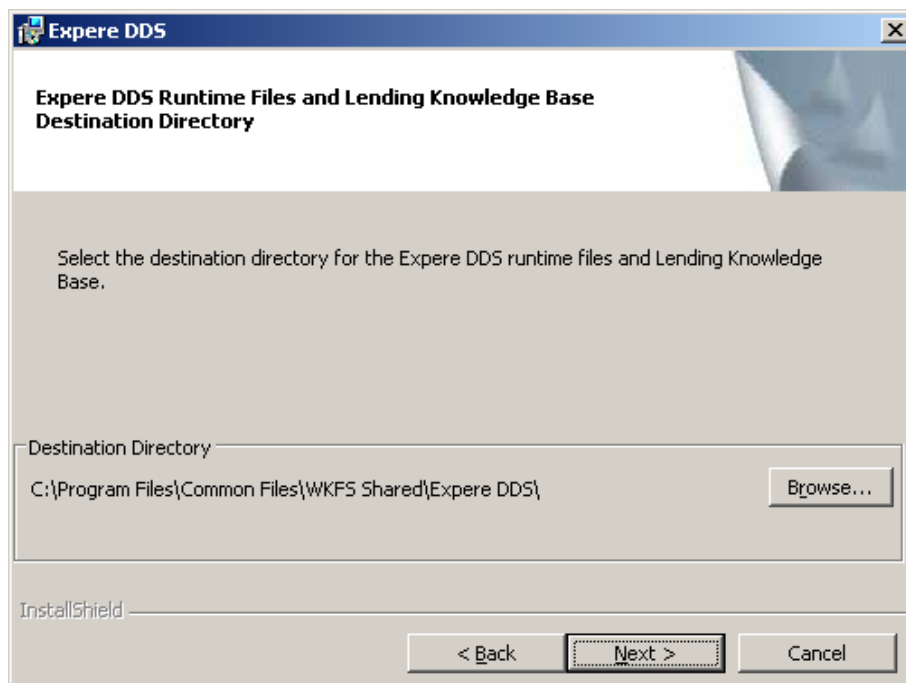


**Note:** You will **not** see the Web Services Destination Directory screen during an OPSA-only server installation, or if Expere Deposit is already installed.

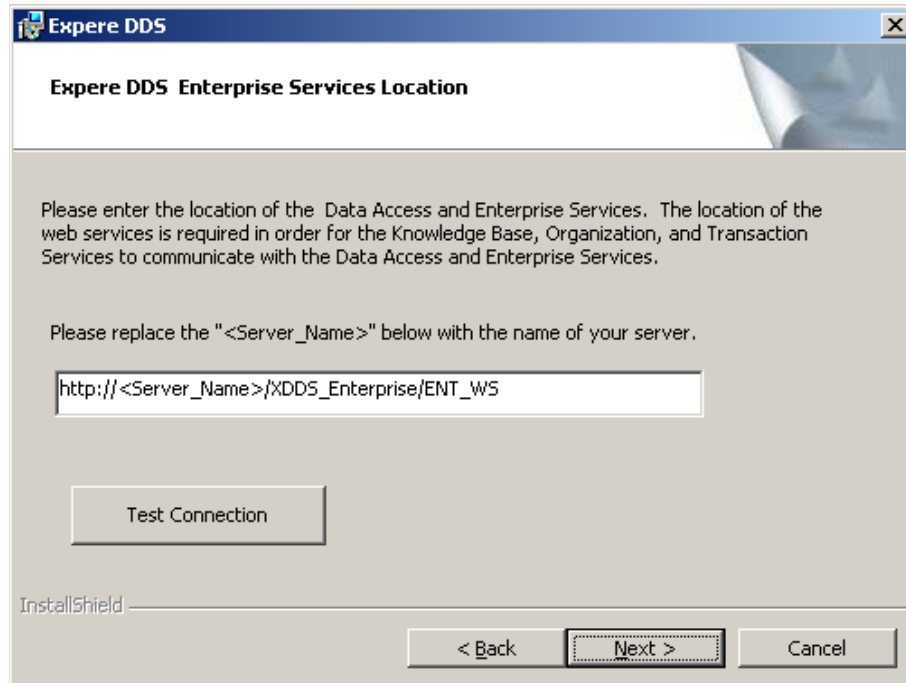
11. Continuing with the installation of the **Data Access & Enterprise Services** component, you will be asked to select the Expere DDS Data Destination Directory.



12. If you selected the Knowledge Base, Organization, & Transaction Services component, you will be asked for the installation path for the Expere DDS Runtime Files and Lending Knowledge Base. The default path is C:\Program Files\Common Files\WKFS Shared\Expere DDS\.



13. Continuing with the installation of the **Knowledge Base, Organization, & Transaction Services** component, you will be prompted to enter the location of the Expere DDS Enterprise Service. This location is a URL of the form:  
*http://<ServerName>/XDDS\_Enterprise/ENT\_WS*. Clicking the **Test Connection** button will result in an error message that the Web Services cannot be found. You can proceed with the installation without a valid connection.

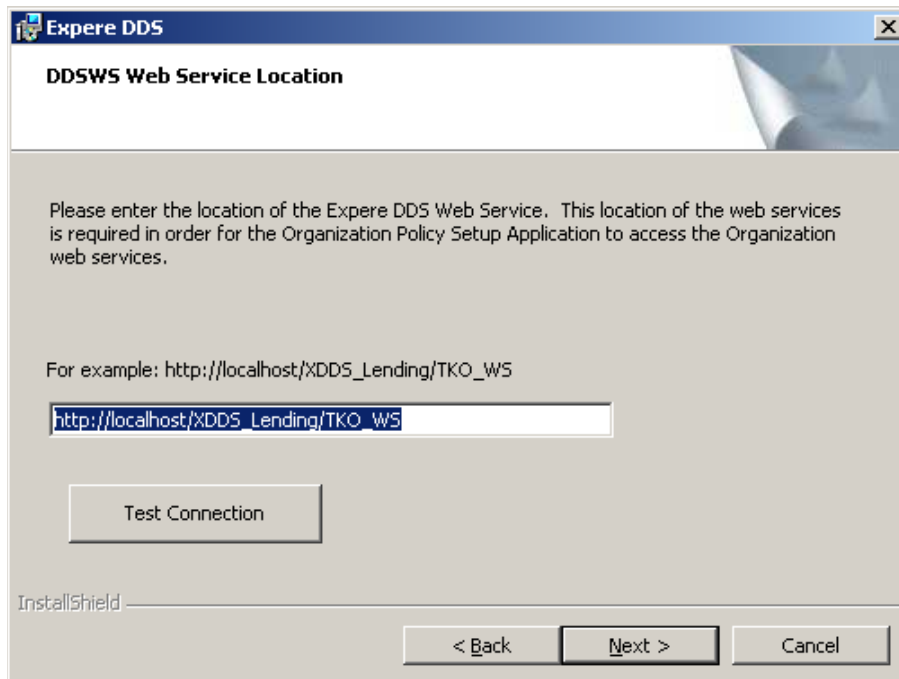


**Note:** This screen will not display if you've also selected to install the **Data Access & Enterprise Services** component in step 7.

14. If you selected to install the **Organization Policy Setup Application (OPSA)** component, select the path to OPSA. The default path is C:\INETPUB\wwwRoot\OPSA\.

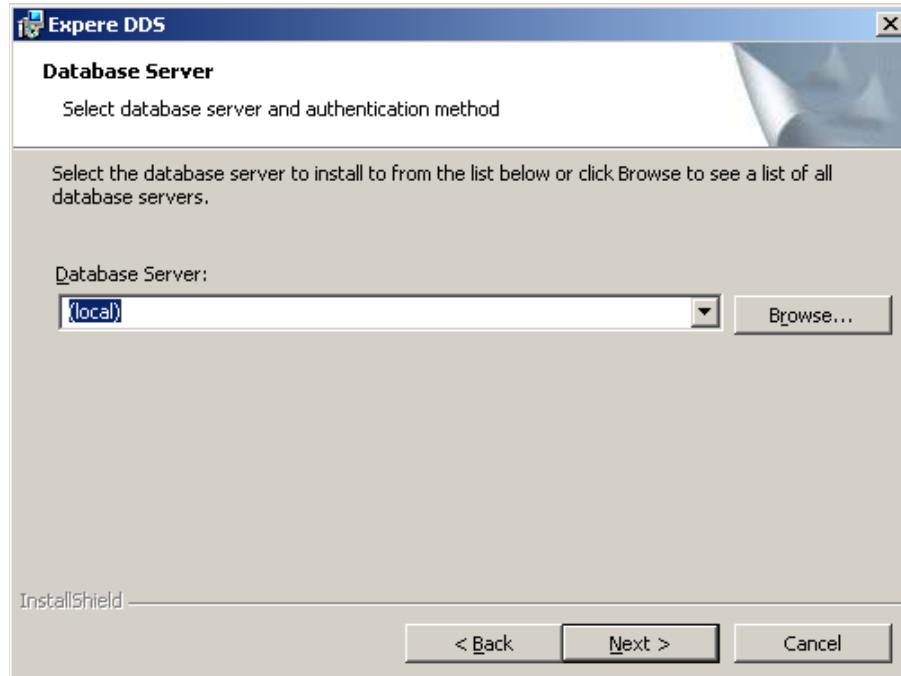


15. Continuing with the installation of the **Organization Policy Setup Application (OPSA)** component, clicking **Next** will allow you to select the path for the Web Services. The default path is `http://localhost/XDDS_Lending/TKO_WS`.



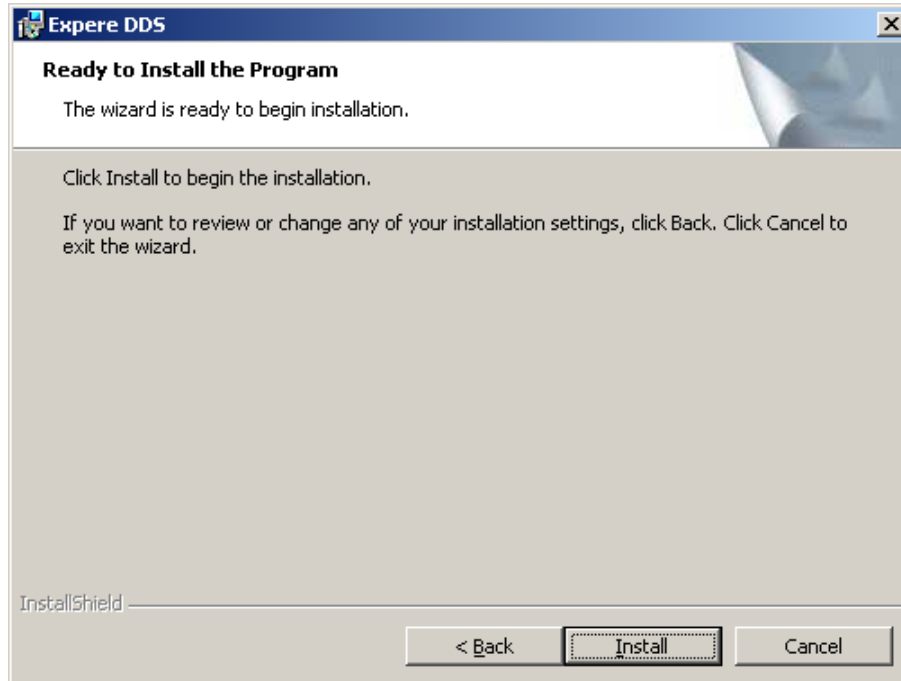
**Note:** If the web services have not been installed, clicking the **Test Connection** button will result in an error message that the Web Services cannot be found. You can proceed with the installation without a valid connection.

16. Continuing with the installation of the **Organization Policy Setup Application (OPSA)** component, after clicking **Next** you will be asked for the database server instance where OPSA will be installed. Choose a server from the list box or browse to a server.

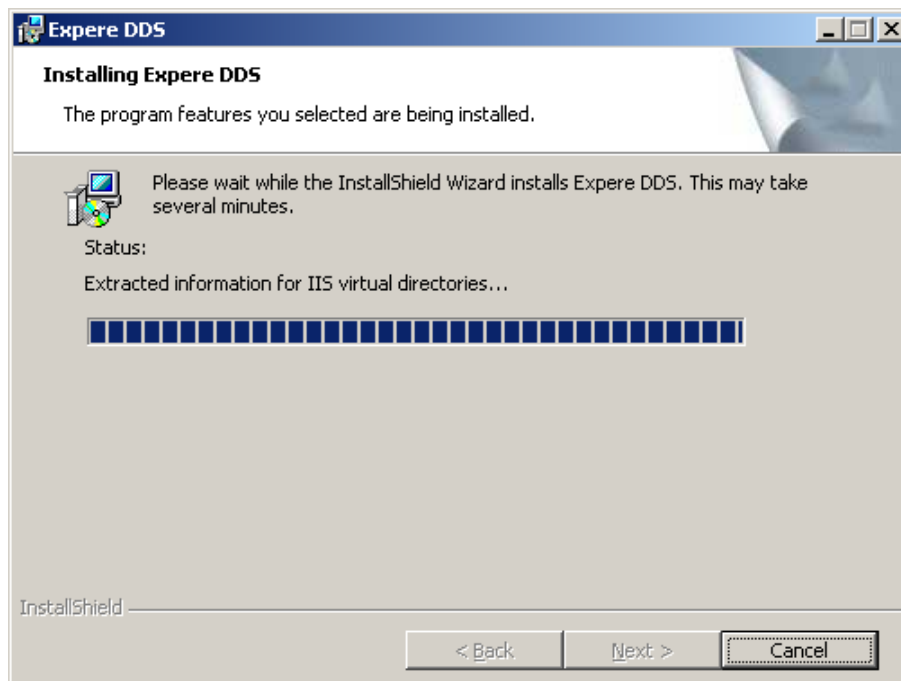


**Note:** The install will verify that the SQL Server selected is a valid SQL Server on the machine where OPSA is being installed. You will receive an 'unable to connect' error message when you click **Next** if the server specified does not exist. Click **OK** on the error and choose an existing SQL server.

17. After installing one or more of the components, Expere DDS is now ready to install. Click **Install**.

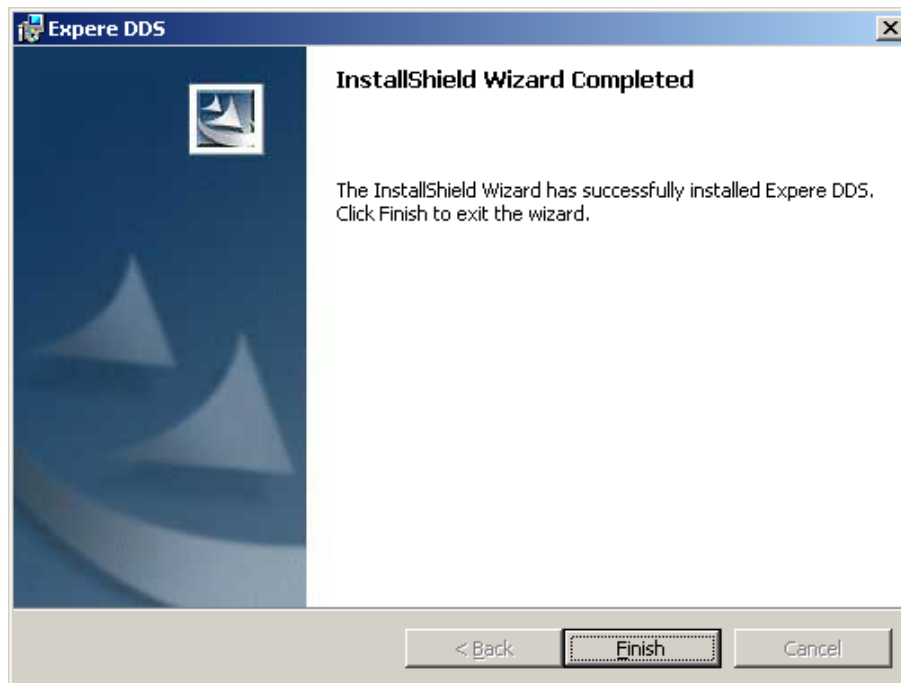


18. You will see progress on the progress bars as the installation proceeds.



**Note:** During the installation of Expere DDS, you may receive an error message about MDAC versions. The installation will not allow you to proceed and will stop. Please read the [MDAC Workaround](#) section later in this document for the solution.

19. If the installation is successful, you will see an Install Completed screen. Click **Finish** to complete the installation. No reboot is necessary.



**Note:** If there are any errors during the installation, a log file is created under your %temp% directory, located here: Documents and Settings\[username]\Local Settings\temp. An example of the file name is: XDDS\_Error\_Log\_2009\_1.txt.

## Post Installation

Several additional tasks need to be performed depending on your situation.

### Terminal Services

If you installed to a Terminal Service environment, put the terminal server into Execute Mode.

## Integration Tools Installation

In order for integration tools to install and uninstall correctly, the SQL Server service you selected when you installed this release of Expere DDS must be running as a user that has administrator permissions to the local machine.

## Fonts

The BSI fonts are installed on the server as part of the Expere DDS installation. The BSI fonts must be installed on all client machines viewing documents from Expere DDS. Without the BSI fonts, documents may not display correctly on client machines. These fonts are available from the Expere DDS Lending CD. To install them:

1. Navigate to the Utilities folder on your Expere DDS Lending CD.
2. Double-click **FONTSetup.exe**.
3. Click past the BSI Fonts Welcome screen and click **Next** twice to begin installation.
4. The fonts are installed. Click **Finish** to close the installation. You may also be asked to restart your machine.

## Transaction data automatic deletion

You can change the web.config file so that transaction data is deleted automatically.

The setting for **XDDS Lending** is:

```
<!-- Sets the number of hours that must pass before a transaction is automatically deleted
```

```
Must be whole number like 48 not .5. -1 will disable this feature -->
```

```
<add key="LendingHoursToPassBeforeAutoDeleteTransaction" value="48"></add>
```

A similar setting for **XDDS Deposit** is:

```
<!-- Sets the number of hours that must pass before a transaction is automatically deleted
```

```
Must be whole number like 48 not .5. -1 will disable this feature -->
```

```
<add key="DepositHoursToPassBeforeAutoDeleteTransaction" value="48"></add>
```

**Note:** After you change the autodelete setting, you must reset Internet Information Services (IIS).

In these examples, the setting results in an auto-delete of transactions that are older than 48 hours old. This auto-delete takes place when the service restarts.

Ensure that your integration with XDDS includes logic to retain any transaction and DDC data in your system database and then to delete the transaction after the document has been generated.

If you recall your transaction to recreate the documents:

1. Use the data saved to recreate the transaction.
2. Re-populate DDC responses using the saved data.
3. Re-generate the documents.

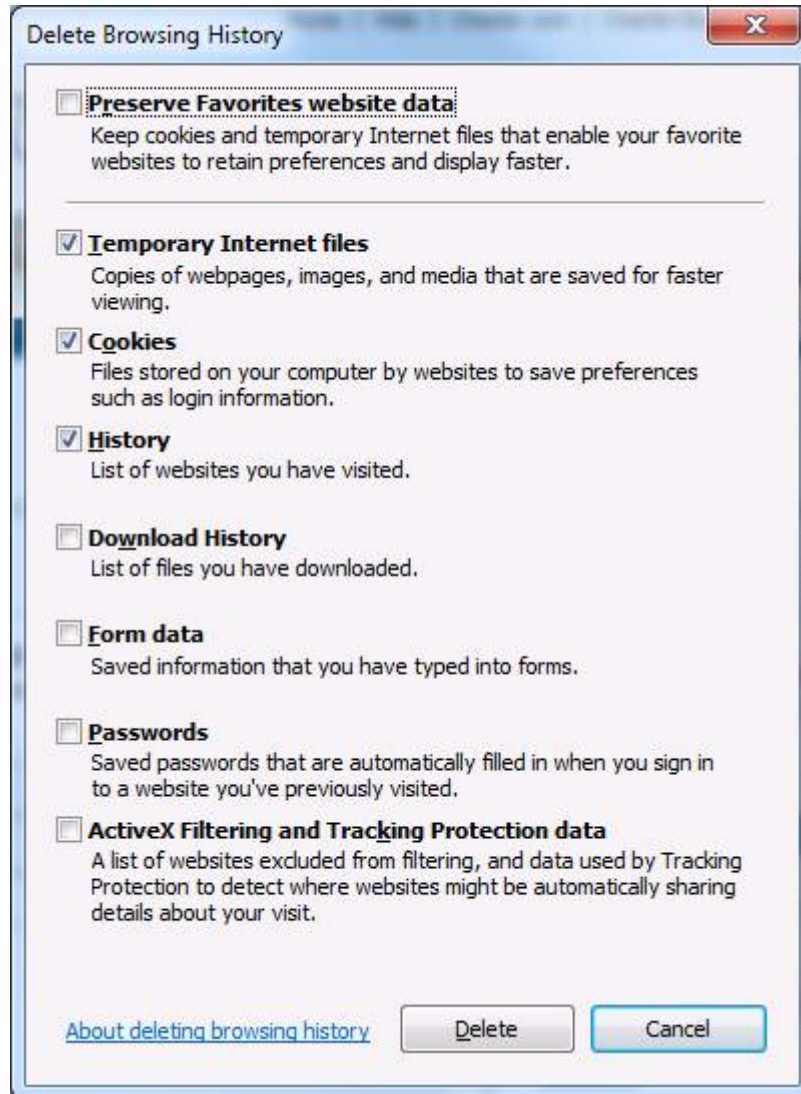
A service worker process checks approximately every ten seconds to find candidate transactions older than 48 hours. If found, the transactions are deleted automatically.

If an autoselection request was made, but did not generate documents for 48 hours, then an invalid Context for that transaction is returned appropriately, as it has been automatically removed.

## Internet Explorer Settings for OPSA

Before using OPSA, you may need to configure some settings in your Internet Explorer browser.

1. Open Internet Explorer and choose **Tools, Internet Options** from the menu.
2. In General Settings, choose **Delete browsing history on exit**. Click **OK**.
3. Chose **Safety, Delete Browsing History** from the browser menu. Clear the option to **Preserve favorites website data**.



4. Click **Delete** to complete the change.
5. Close and restart your browser.

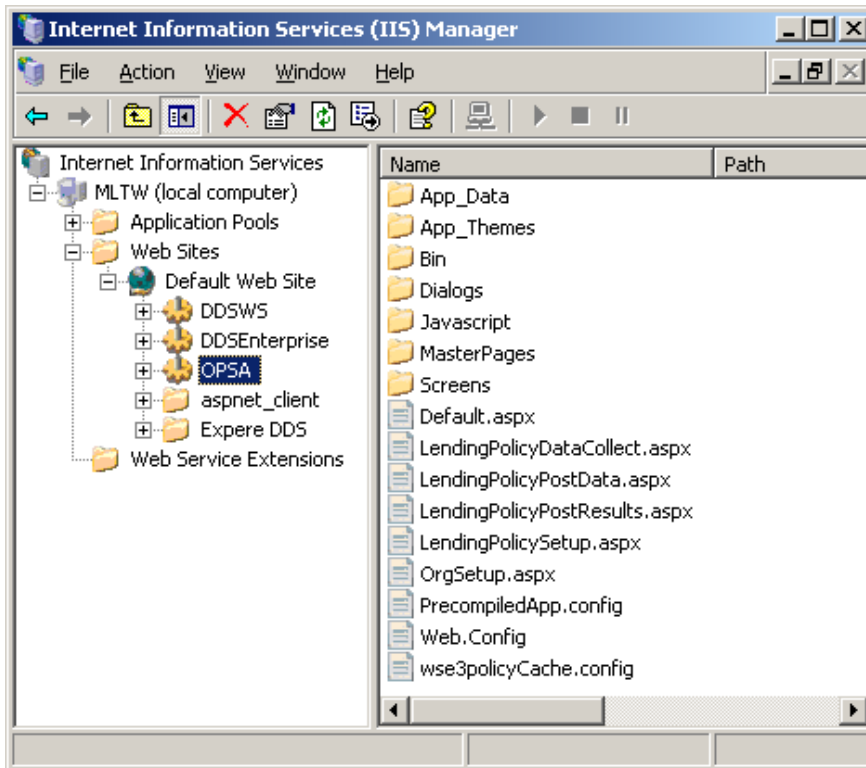
Your browser is now ready to use OPSA.

## Additional Permissions to View ARM and HE Documents in OPSA

You may receive an "access denied" error when trying to preview an ARM or HE document in OPSA. If you encounter this issue additional rights may be required for a folder in the OPSA file structure. The anonymous user account used for the OPSA application must have read and write access to the `..\\intetpub\\wwwroot\\OPSA\\Temp\\Docs` folder on the OPSA server. The anonymous user account is typically named `IUSR_<machine name>`.

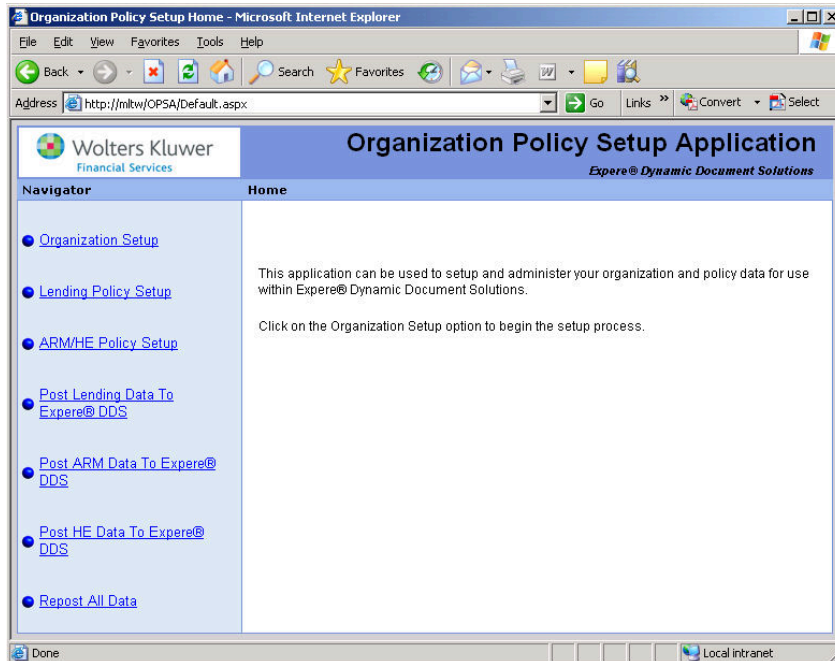
## What's Next

No new Program Items will be added to your Start menu after the Expere DDS installation. To start working with Expere DDS, from the **Start** button, choose **Administrative Tools** and open the **IIS Manager** and browse to the **Default Web Site**.



You can find the path to the Organization Policy Setup Application from here. For the machine pictured above the path would be <http://mltw/OPSA/Default.aspx>.

## Program Maintenance



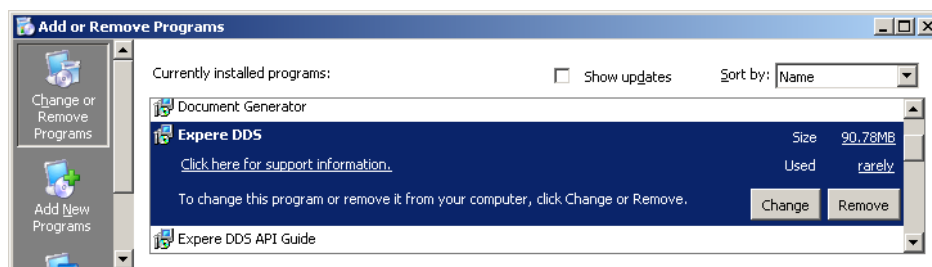
From OPSA, you can start working with organization structure and lending policy in a web services environment.

**Note:** If OPSA does not start because of insufficient rights, please read the [OPSA SQL Rights](#) section later in this document.

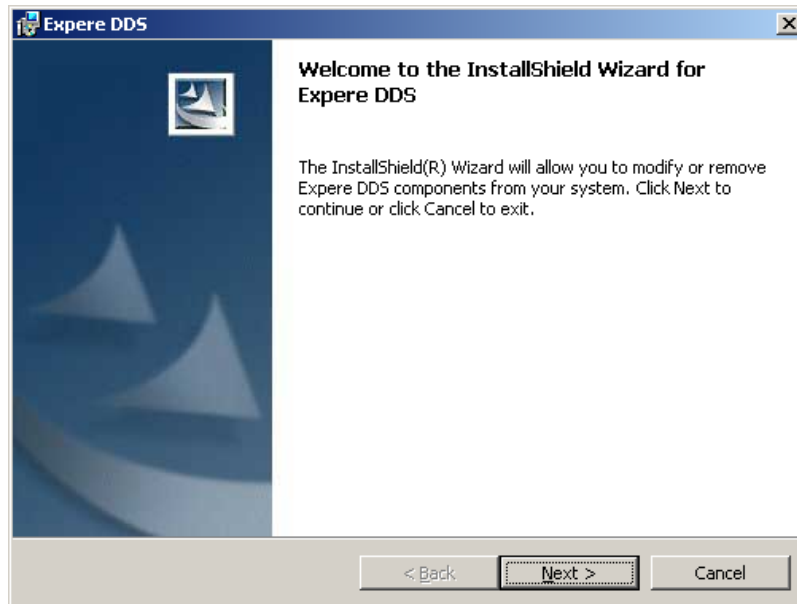
## Program Maintenance

To Modify or Repair Expere DDS:

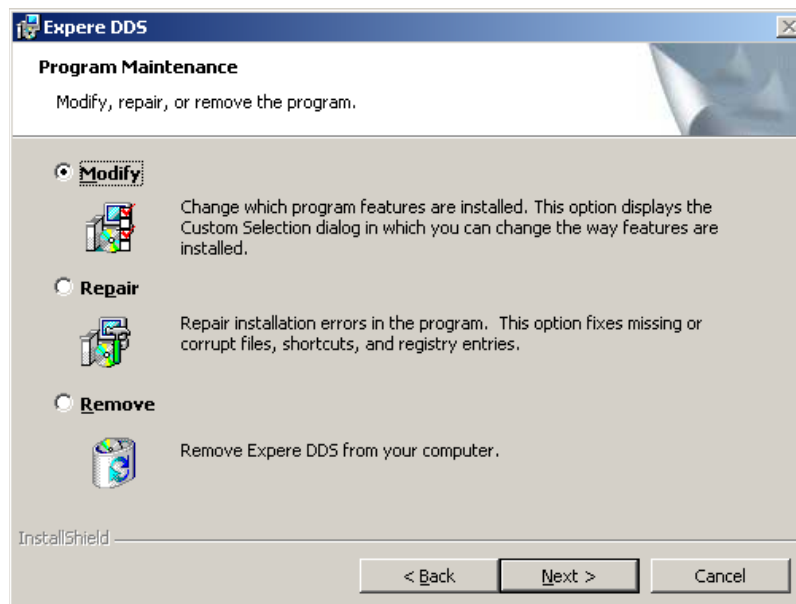
1. Choose **Start, Control Panel, Add or Remove Programs**.
2. Choose **Expere DDS** and click **Change**.



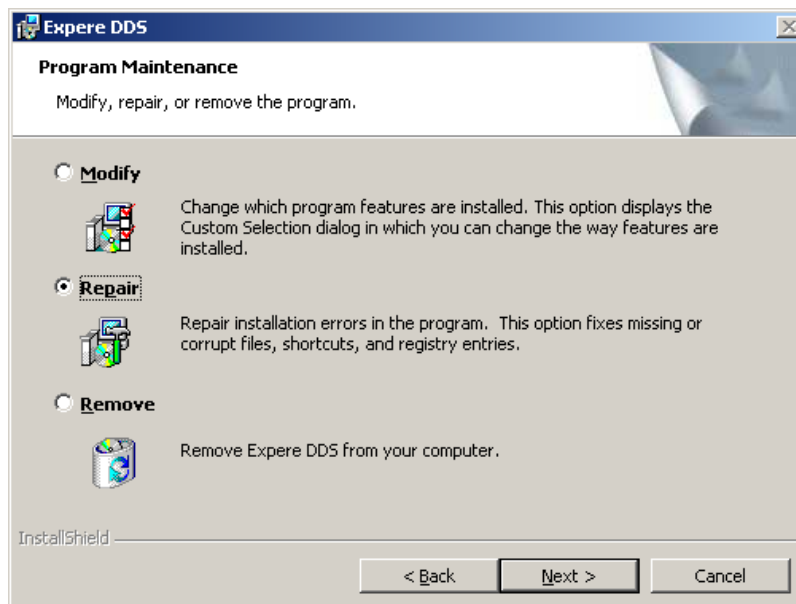
3. Click **Next** when the Welcome screen appears.



4. Select **Modify** to selectively uninstall one or more Expere DDS components: the Web Services, OPSA, or the KB.



5. Select **Repair** to reinstall Expere DDS.

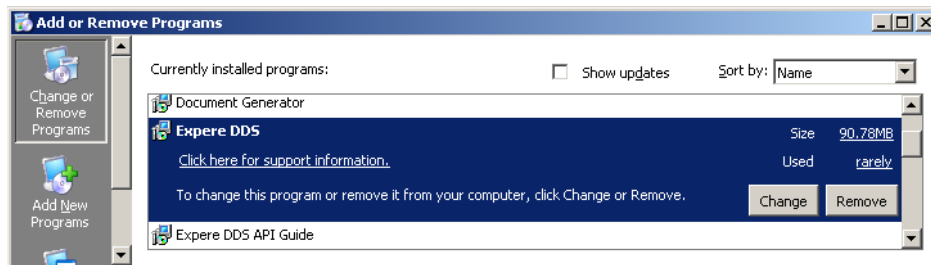


6. After making your selections, click **Install** to uninstall components or to reinstall Expere DDS. Click **Finish** when the Installation Wizard has completed.

## Uninstallation

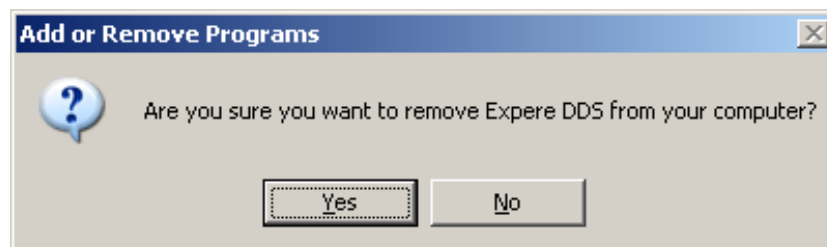
To uninstall Expere DDS:

1. Choose **Start, Control Panel, Add or Remove Programs**.
2. Choose **Expere DDS** and click **Remove**.

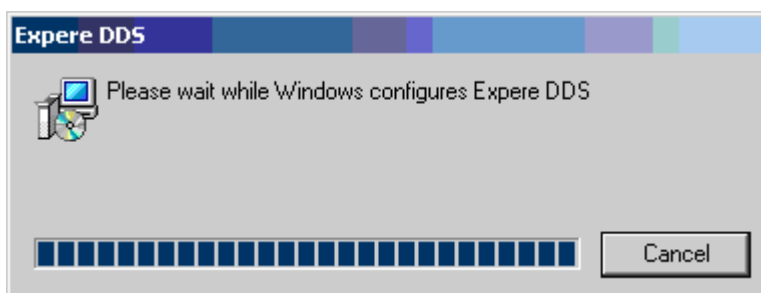


**Note:** Click **Change** to reinstall Expere DDS or to selectively uninstall one or more components: the Web Services, OPSA, or the KB.

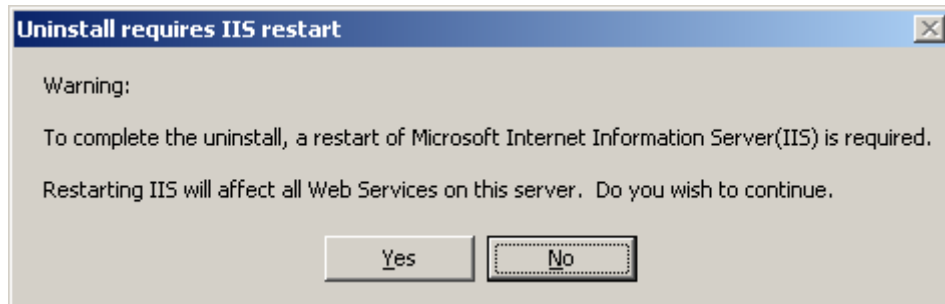
3. You will be asked to confirm the uninstall of the component. Click **Yes** to proceed with the uninstall.



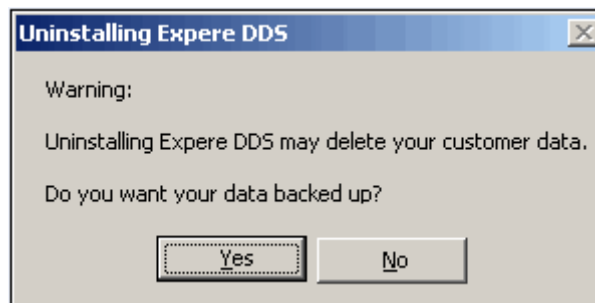
4. During the uninstall, you will be able to monitor the status via status messages and progress bars.



5. You will be warned that IIS will be temporarily stopped and restarted during the uninstallation. Click **Yes** to continue, or **No** if this is unacceptable for your web server and to uninstall at a later time.



6. You may receive a warning about losing your customer data. Click **Yes** to back up your data.



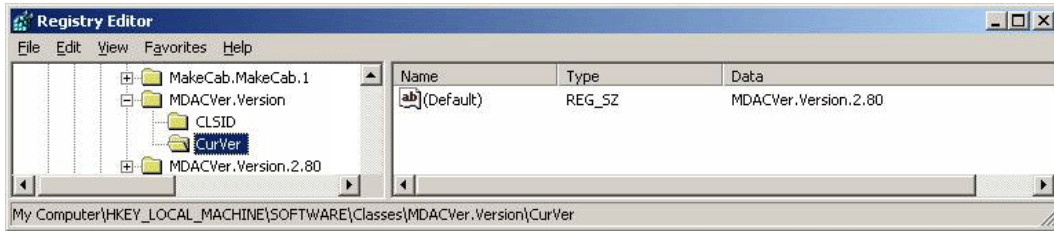
7. The uninstall will proceed to completion and terminate; Expere DDS has been uninstalled. No reboot is necessary.

## MDAC Workaround

If the MDAC version on your computer is not 2.80, your Expere DDS installation will stop with an error indicating you need MDAC 2.80. This will occur even if your MDAC version is greater than 2.80.

The Expere DDS installation reads the MDAC version from the registry. If the value is not 2.80 the installation fails. You need to add a new key or edit an existing key in the registry and then re-try the Expere DDS installation. The new or edited key should read:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Classes\MDACVer.Version\CurVer  
Value (Default) = MDACVer.Version.2.8.0
```



Registry editing can be performed in the Registry Editor which can be started from the command-line or from Start, Run, regedit.

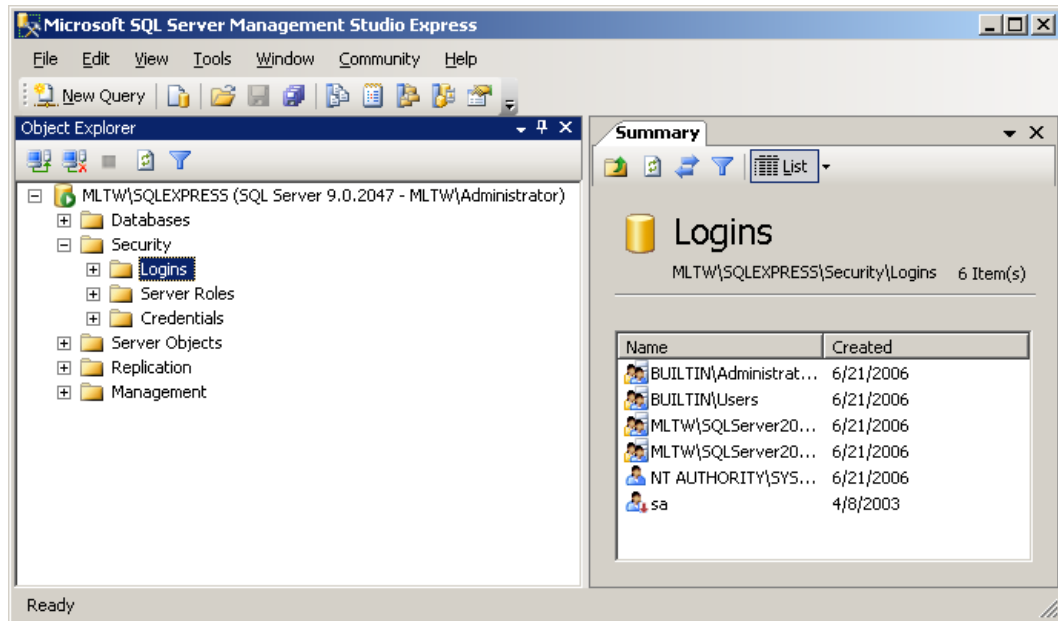
Note that if a registry key exists prior to your edit, you will need to change the value of the registry key back to its original value after the completion of the Expere DDS installation. Also, if you added an MDAC registry key entry to allow the Expere DDS install to proceed you will need to return to the registry after installation and delete the key.

## OPSA SQL Rights

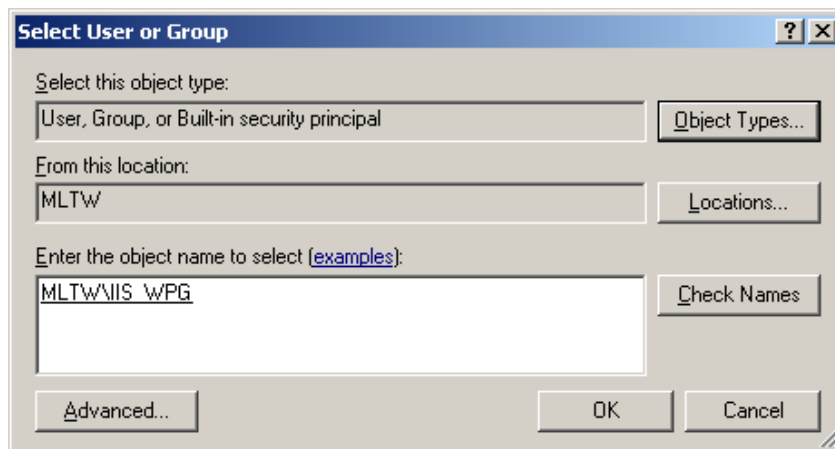
The first time you try to open the Organization Policy Setup Application in your browser, you may receive an error message indicating IIS does not have sufficient rights to access the SQL database. You will need to modify the security settings for your SQL server. This is a two step process: one to add the IIS\_WPG group to Logins and second to add read/write rights for IIS\_WPG to the OPSA data table.

### Adding IIS\_WPG to Logins

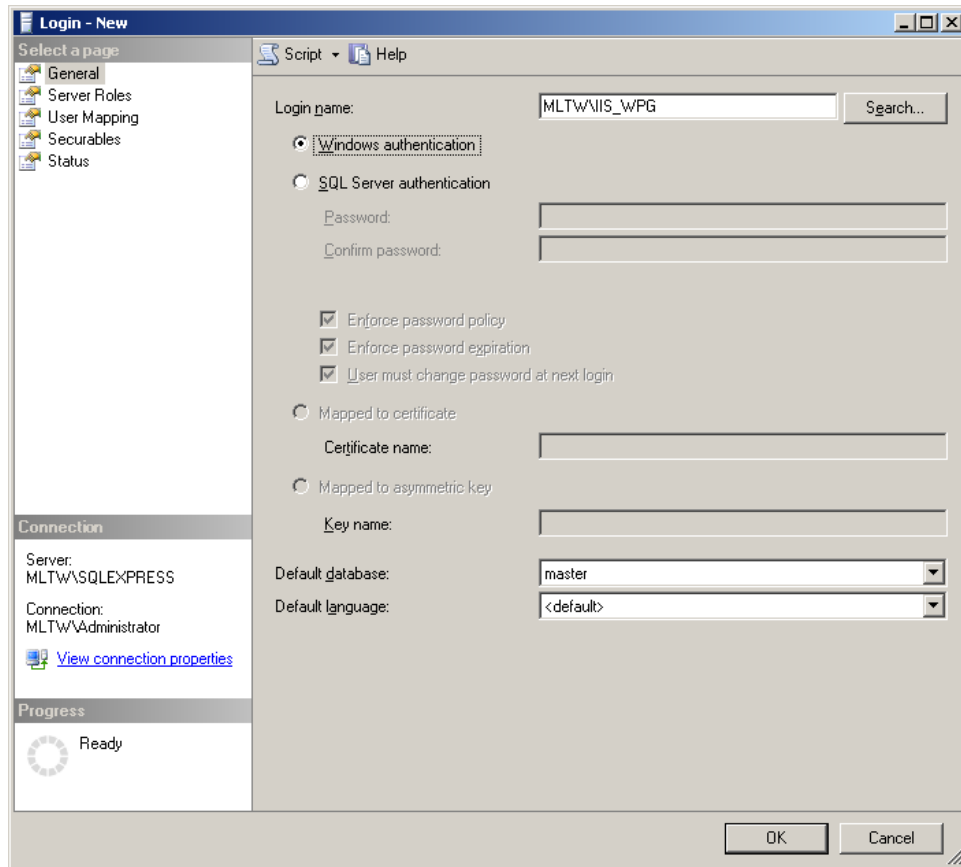
1. Open SQL Server Management Studio or SQL Server Management Studio Express from **Windows, Start, Microsoft SQL Server 2005** and connect to the database.
2. Select the Security folder under the SQL Server instance name.
3. Select the Logins folder under the Security folder.



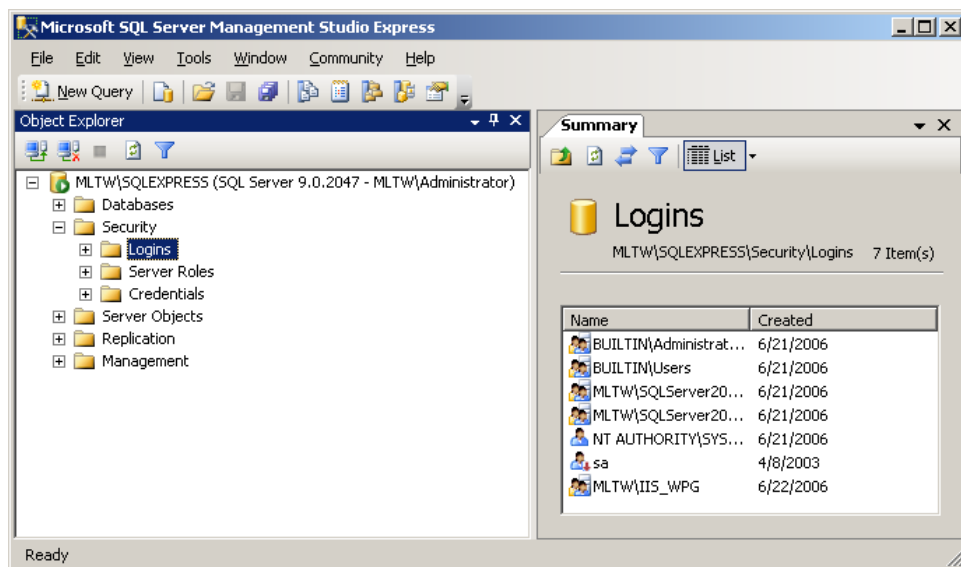
4. Right-click the Logins folder and choose **New Login**.
5. Make sure the General page is selected in the left pane. From the right pane, click the **Search** button at the top of the pane.
6. Click **Object Types** and make sure the **Groups** checkbox is selected. Click **OK**.
7. Enter the name **IIS\_WPG** as an object name and click **Check Names**. The group name will be underlined and the computer name prepended when verification is successful.



8. Click **OK**. The completed IIS\_WPG New Login should look like:

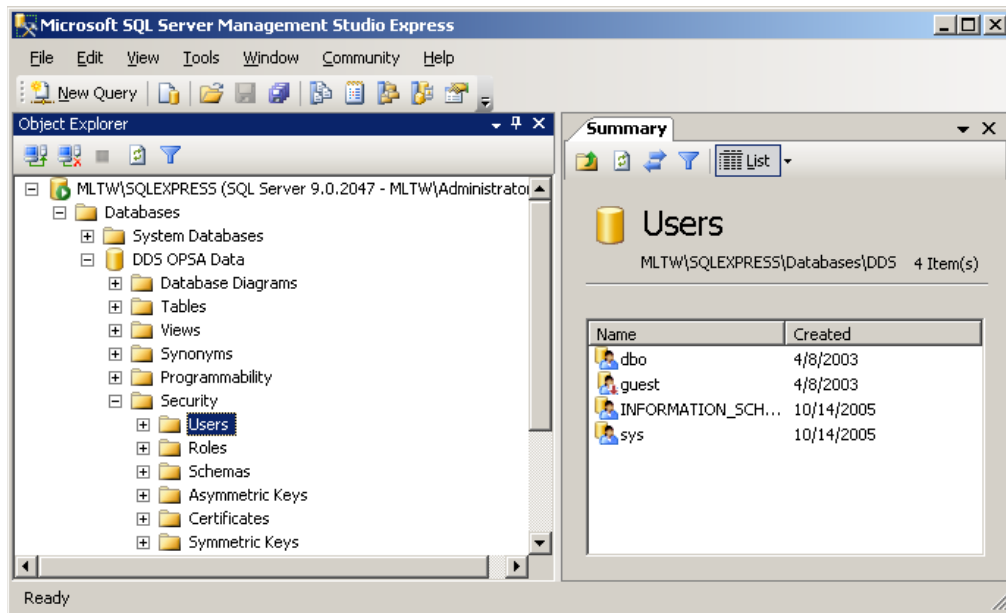


9. Click OK. The IIS\_WPG group will now appear as a new login.

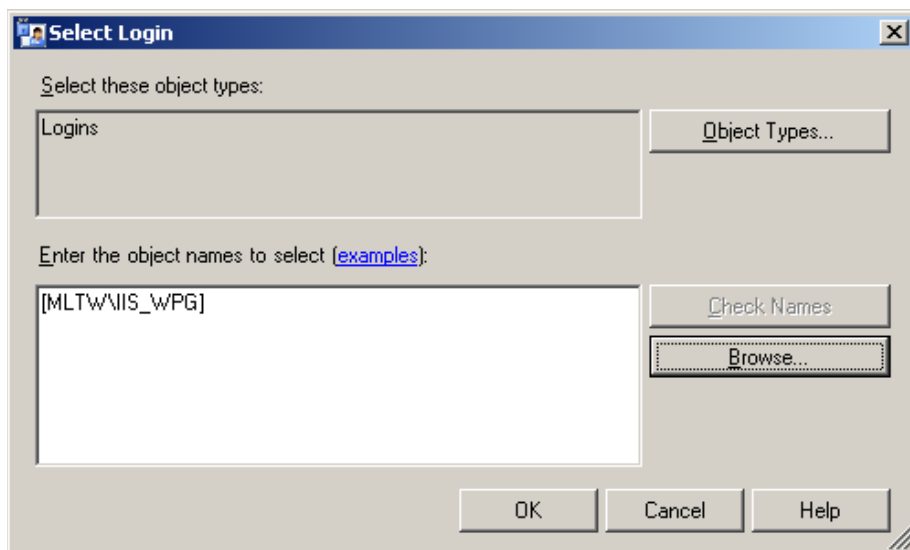


## Add Read/Write Rights for Users for OPSA

1. From the SQL Server Management Studio or SQL Server Management Studio Express, navigate through the DDS OPSA Data table to Security, Users.



2. Right-click Users folder and choose New User.
3. Make sure the General page is selected in the left pane. From the right pane, click the Ellipsis button next to Login Name.
4. Add IIS\_WPG as the object name and click Check Names.



5. Click **OK**. IIS\_WPG is now included in the Users list.
6. Close SQL Server Management Studio or SQL Server Management Studio Express.
7. OPSA should now open without any error messages.

## Support Services

For questions regarding the use of this product, please contact your integrator.

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Wolters Kluwer Financial Services  
6815 Saukview Drive  
St. Cloud, MN 56303  
Toll-free: 800.274.2711

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