



# Installation Instructions - Lending

Dynamic Document Solutions

2019.1  
March 2019



This publication was written for Installation Instructions-Lending.

**Publication Information / Version**

Dynamic Document Solutions  
Installation Instructions-Lending  
Software Version Information 2019.1  
Document Version Information N/A  
Release Date March 2019

**Distributed Subject to Terms of a License or other Agreement**

The contents of this publication, including its appendices, exhibits, and other attachments, as updated or revised, are highly confidential and proprietary to Wolters Kluwer Financial Services, Inc. or its subsidiaries or affiliates ("Wolters Kluwer Financial Services"). This publication is distributed pursuant to a Non-Disclosure Agreement, Evaluation Agreement, License Agreement and/or other similar agreement(s) with Wolters Kluwer Financial Services, Inc. or its subsidiary or affiliate. Unless otherwise specifically provided in such agreement(s), the reproduction of this publication is strictly prohibited. Use and distribution of this publication are also subject to the responsibilities and obligations of such agreement(s), which require confidential treatment of this publication and its contents.

Information in this guide is subject to change without notice and does not represent a commitment on the part of Wolters Kluwer Financial Services.

**Do Not Reproduce or Transmit**

Unless otherwise specifically authorized in the agreement or license under which this publication has been provided, no part of this publication may be posted, played, transmitted, distributed, copied or reproduced in any form or by any means, electronic or mechanical, including photocopying, recording, or retaining on any information storage and retrieval system, without prior written permission from Wolters Kluwer Financial Services.

Requests for permission to reproduce content should be directed to Wolters Kluwer Financial Services, Inc., Corporate Legal Department, by telephone at 1-800-397-2341.

**Not a Substitute for Legal Advice**

This publication is intended to provide accurate and authoritative information about the subject matter covered based upon information available at the time of publication. Examples given in this publication are for illustrative purposes only.

Development of this publication and the software (including forms, disclosures, reports, and other documents generated by the software) or other products that it describes was based on Wolters Kluwer Financial Services' understanding of various laws, regulations and commentaries. Wolters Kluwer Financial Services cannot and does not guarantee that its understanding is correct.

This publication is not intended, and should not be used, as a substitute for legal, accounting, or other professional advice. Wolters Kluwer Financial Services is not engaged in providing legal, accounting or other professional services. If legal or other professional assistance is required, you should seek the services of a competent professional. We encourage you to seek the advice of your own attorney concerning all legal issues involving the use of this publication and any products described in this publication. If your interpretations or your counsel's interpretations are contrary to those expressed in this publication, you should of course, follow your/your counsel's interpretations.

The following notice is required by law:

**WOLTERS KLUWER FINANCIAL SERVICES' PRODUCTS AND SERVICES ARE NOT A SUBSTITUTE FOR THE ADVICE OF AN ATTORNEY.**

**Warranty Disclaimer**

Except only for the warranties (if any) expressly set forth in the agreement(s) under which this publication is provided (i.e., your agreement or license for the described product), this publication is provided "as is", and Wolters Kluwer Financial Services makes no warranty, express, implied, by description, by sample or otherwise, and in particular and without limitation, makes no implied warranties of merchantability or fitness for purpose. No modifications to this Warranty Disclaimer are authorized unless in writing and signed by the President or a Vice President of the Wolters Kluwer Financial Services entity licensing the product described in this publication.

**Attributions and Acknowledgements**

Expere and Bankers Systems are the registered trademarks of Wolters Kluwer Financial Services, Inc. All other trademarks are the property of their respective owners.

**Copyright Information**

©2019 Wolters Kluwer Financial Services, St. Cloud, Minnesota

This publication is the confidential information of Wolters Kluwer Financial Services. Distribution of this publication is subject to restrictions in the license or agreement under which this publication is provided to authorized Wolters Kluwer Financial Institution customers.

All rights reserved.

# Table of Contents

Introduction ..... 1

Before Installing ..... 1

DDS Server Installation ..... 3

    After the Server Install ..... 5

DDS Client Installation ..... 5

    Client Side Permissions ..... 8

    After the Client Install ..... 9

Silent Installation ..... 9

    Preparation of the INI File ..... 10

    Command-Line Installation..... 11

Uninstallation ..... 11

Support Services ..... 12

Appendix A: Secondary Data Capture..... 12

    New SDC Database Setup ..... 12



## Introduction

Welcome to the installation of Dynamic Document Solutions (DDS) component and lending knowledge base from CD. These instructions apply to three installation types:

- New installations, that is, installation on computers that do not contain a current installation of DDS or any other Wolters Kluwer Financial Services product.
- Updated installations, that is, installation on computers that contain an existing installation of DDS.
- Silent installation. DDS can be installed from the command line with no further user intervention required or screen output shown over the course of the install.

Instructions are included for server and client installations. Note that the Alternate Text Editor is also installed with DDS server. For instructions on starting and using the editor, please see its user guide, *AlternateTextEditor\_UG.pdf*.

**Note:** Update existing installations with the same installation type. For instance, update a client machine to a client machine or a server machine to a server machine. Updating a client machine to a server machine or *vice versa* is not supported. Contact your integrator if you have questions.

Some instructions listed below apply only to new installations or only to updated installations. These will be marked with a **[New installations only]** or **[Updated installations only]** marker text phrase. Any text not so marked, applies to both types of installations.

**Note:** The installation configurations discussed in this document are the only installation configurations supported. Other installation configurations are not supported for this release.

## Before Installing

For a server installation, login as the Network Administrator, not as a Local Administrator.

For a server installation, place the CD into the server that is being updated.

For a server installation, perform the installation from a server console; do not remote into the server.

Set to manual or disable any anti-virus software.

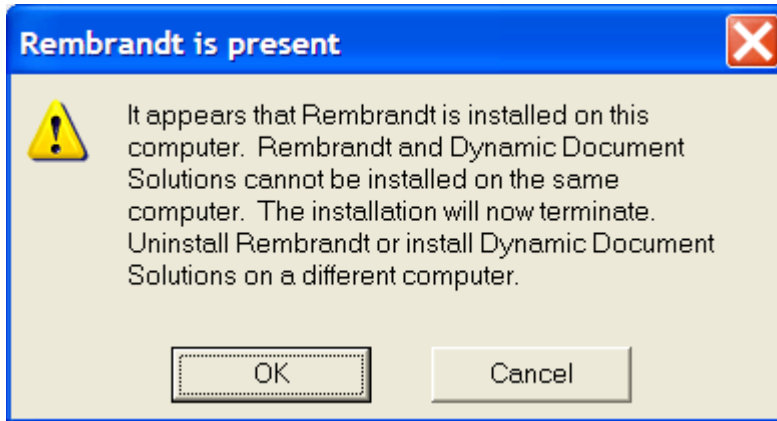
If you are installing the product on a machine that is running the Windows 2008 operating system, you must select the "Run As Administrator" option when running the installation program.

[Updated installations only] Backup your organization catalog files and DDS\_SDC SQL database.

[Updated installations only] Restart the server.

[Updated installations only] Stop and restart the BSI DocServices service. If the service restarts, continue with installation. If the service does not restart, please contact your integrator.

If the computer selected for DDS installation also has Rembrandt Lending Systems installed, you will see the following error message:

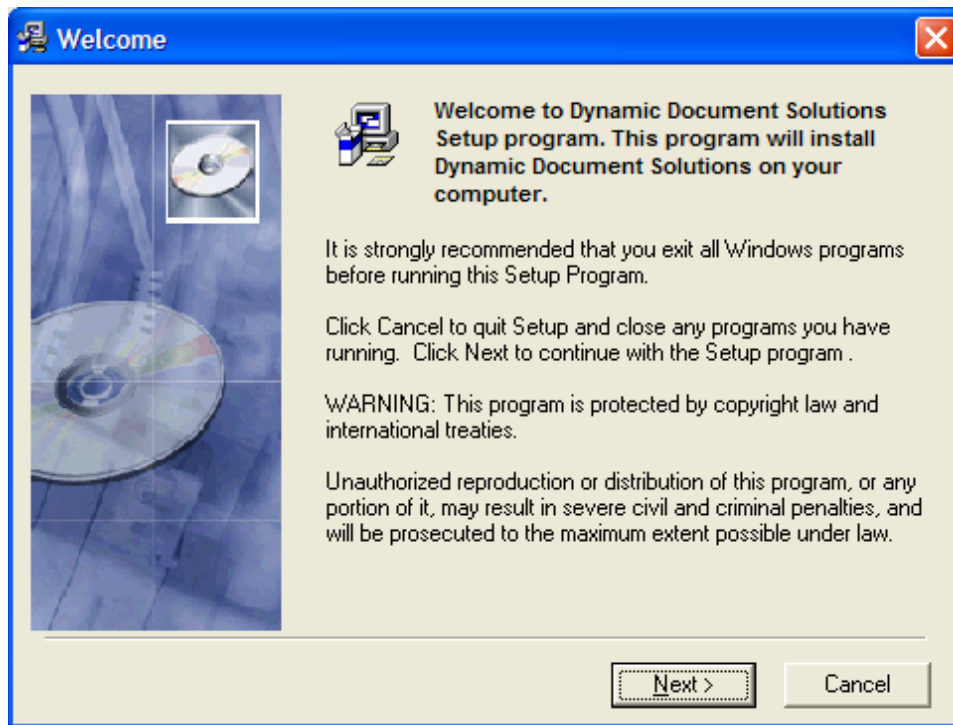


Installation will terminate when you click **OK**.

**Note:** Rembrandt and DDS cannot co-exist on the same computer.

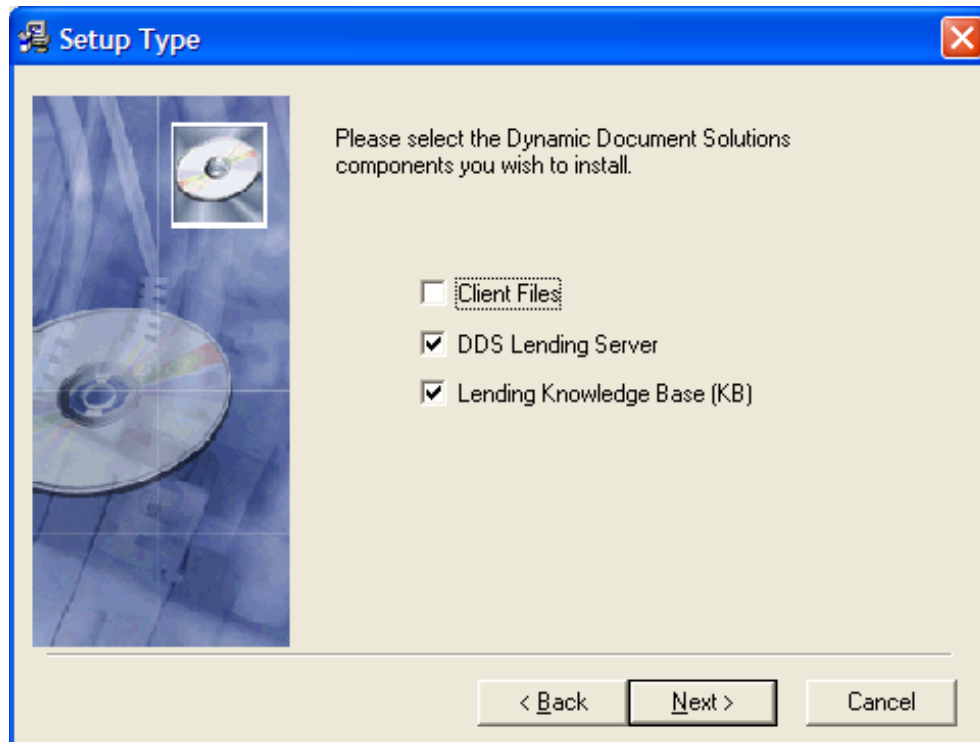
## DDS Server Installation

1. Insert the install CD and double-click **Setup.exe** in the root of the CD.



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

2. At the Setup Type dialog box, for updated installations, verify that the DDS Lending Server and Lending Knowledge Base (KB) check boxes are selected. For new installations, select both check boxes.



**Note:** If you are anticipating running client side utilities, such as DDS Client, Organization Policy Setup Application, or Credit Insurance or other custom form installation, on the server console, you will need to choose all three of the check boxes.

3. **[New installation only]** Next, choose your installation location. It is recommended to use the default install location, or you can click the **Browse** button to install to an alternate location.

**Note:** If you chose to install using all three check boxes, you will also be prompted for the installation location for the client.

4. Click **Next** twice, or three times if you chose all three check boxes, to begin the installation.
5. Reboot the server when prompted.

**Note: [New installation only]:** Information for setting up a new SQL Server database for the storage of your secondary data capture (SDC) information can be found in [Appendix A](#).

6. **[Updated installation only]** If you are saving SDC data in the DDS\_SDC database, verify the settings listed in Steps 6 through 9 in [Appendix A](#).
7. Re-enable your anti-virus software, if it was disabled prior to installation.
8. For both new and updated installations, see the *Organization Policy Setup Application System Administrators Guide*, OrgAppPolicyAdminGuide.pdf, [../../../../Documents and Settings/alka.arora/My Documents/Install\\_Instruc\\_DDS\\_Lending.doc - AppB#AppB](#) located on the Integrator Tools CD, for information on creating and editing DDS organizational catalogs.

## After the Server Install

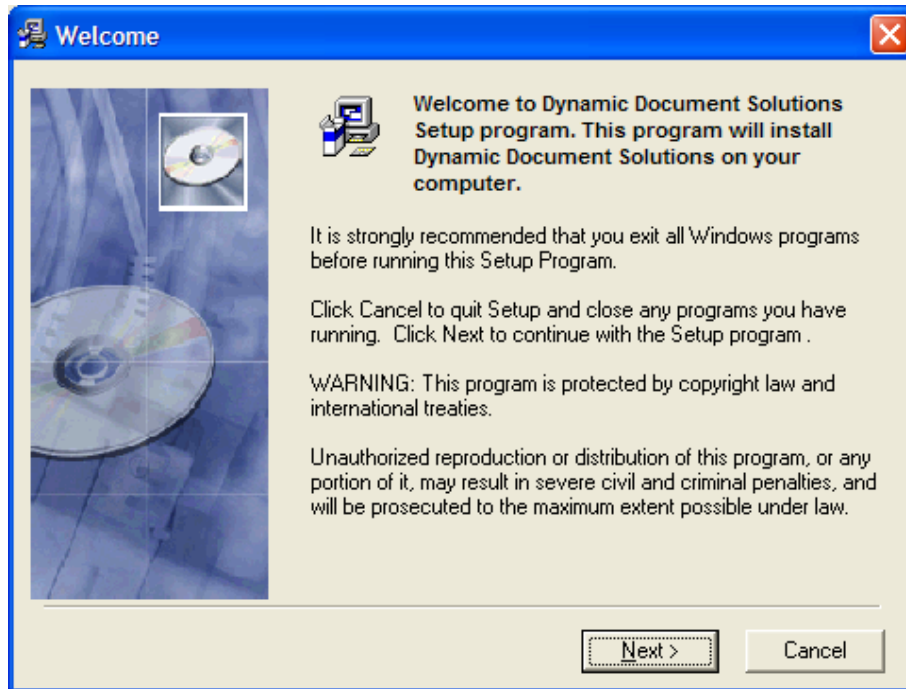
To prevent document errors, repost all of your organization catalogs after updating DDS. You can repost all of your organization catalogs at once with the Organization Policy Setup Application by choosing **File, Post all organizations to DDS** from the menu.

You may need to update the server side permissions. The account that is running the BSI DocServices service will need full control to the BSI Shared directory and all subdirectories. By default this is the local system account.

## DDS Client Installation

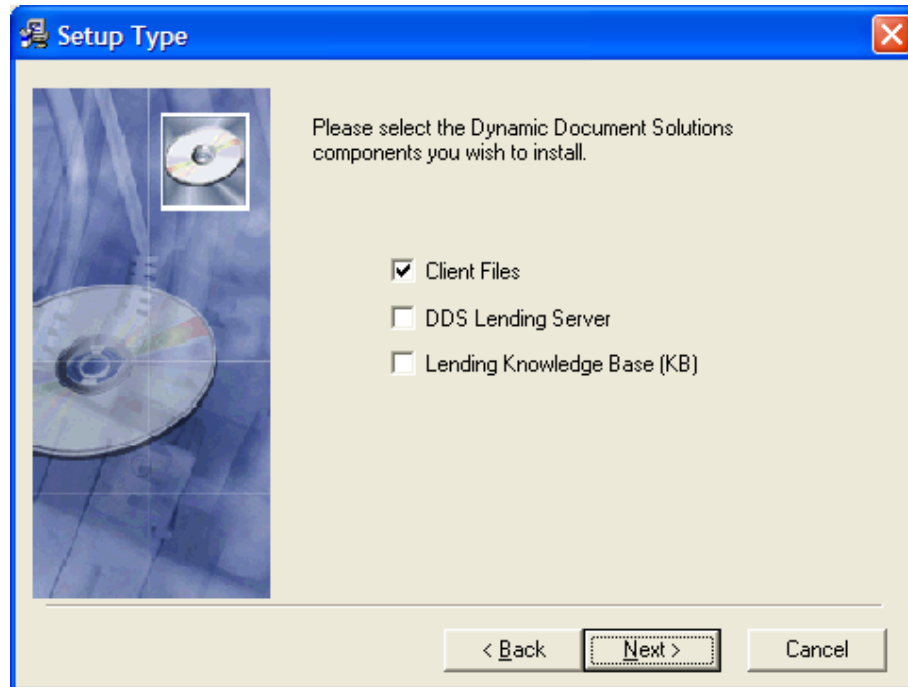
**Note:** If you are installing on a Terminal Services server, with or without Citrix, make sure you are in install mode prior to beginning the client installation.

1. Insert the install CD and double-click **Setup.exe** in the root of the CD.



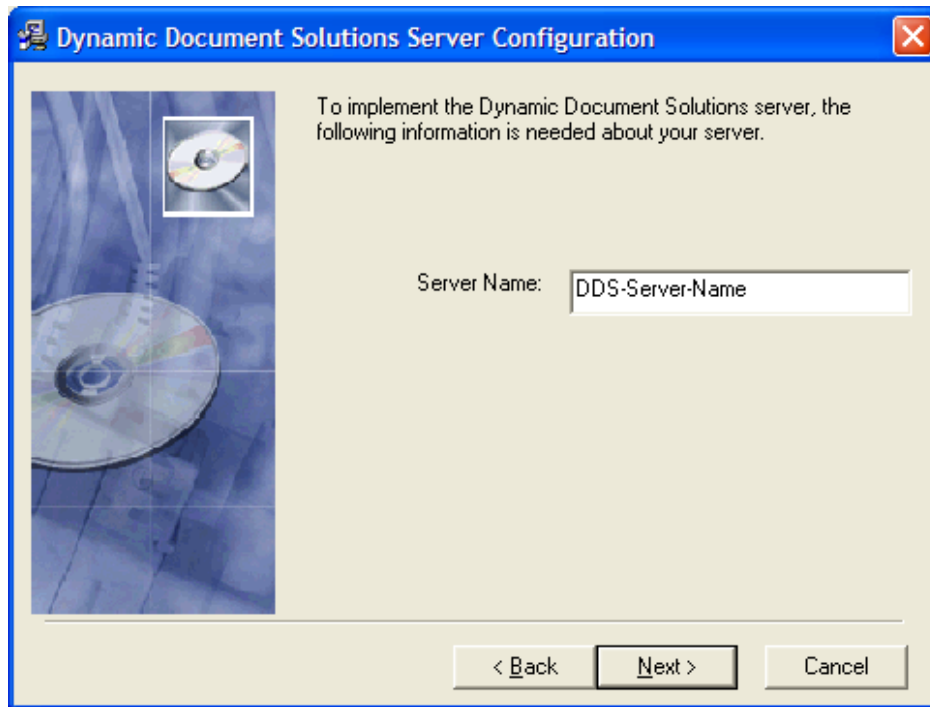
**Note:** If you are installing the product on a machine that is running the Windows 2008 operating system, you must select the "Run As Administrator" option when running the installation program.

2. At the Setup Type dialog box, for updated installations, verify the Client Files check box is selected. For new installations select the Client Files check box only.



3. Next, choose your installation location for the client. It is recommended to use the default install location, or you can click the **Browse** button to install to an alternate location.

4. For a new installation, select the DDS Server Name. The local computer name is the default. Change this to the name of the DDS Server. For an updated installation, verify the DDS Server Name. This is the name chosen during the [DDS Server Installation](#).



5. Click **Next** twice to begin the installation.
6. Reboot when prompted.

## Client Side Permissions

1. Set NTFS permissions on the BSI Shared folder, that is, Program Files\Common Files\BSI Shared\, and sub-directories, whether accessing from Terminal Services or a PC client, granting individual users or a group containing all DDS users the following NTFS permissions:

- Read and Execute
- List Folder contents
- Read
- Write

**Note:** Be sure to propagate permissions.

2. Set NTFS permissions on Winnt\System32, granting read and execute permissions for the group Everyone or a group containing all DDS users. Be sure to propagate permissions.

3. DDS uses the following Registry keys and users must be able to access the following areas in the Registry. There are other keys; however, this is the minimum that requires access:

HKEY\_Local\_Machine\Software\BSI

## After the Client Install

1. For a new installation, install custom forms, if applicable. For an updated installation you only need to install any new custom forms not present before the client install. Custom forms present before the DDS client installation do not need to be re-installed.

**Note:** Consult the *Custom Forms Installation Instructions*, CustomForm\_DDS100\_InstallInstruc.pdf, available on the Integrator Tools CD, for details on installing custom forms.

2. [New installations only] If saving Secondary Data Capture (SDC) data, see [Appendix A](#) for instructions on setting up the database and ODBC on the server.
3. Re-enable your anti-virus software, if it was disabled prior to installation.

## Silent Installation

Silent installation is available in DDS for new installations or when updating existing installations with the same installation type. For instance, updating a client machine to a client machine is supported. Updating a client machine to a server machine is not supported. Contact your integrator if you have questions.

The DDS Lending installation can be run in silent mode by passing in parameters. Prior to installation the parameters are added to an .ini file created in a plain text editor. The contents of the INI file are read by the installation upon execution. With the silent installation, DDS installation can be combined with other integrated component installations. Progress bars display on the screen during a silent installation but no user interaction is required.

The installation logic proceeds as follows:

- The installation determines if DDS has been installed before.
- If it has not, and you have selected only the Knowledge Base, the install will default to the DDS Server installation.
- If the install determines that DDS has previously been installed, the installation will continue with a KB only install. The integrated LOS is responsible for restarting the workstation or server after the installation.

**Note:** The PC should be rebooted before using DDS. Rebooting does not have to occur immediately after a silent installation if the DDS installation is part of a larger software installation batch. The reboot should be performed after the batch operation has completed in this situation.

## Preparation of the INI File

The structure of the INI file used by the silent installation is as follows:

```
[PATH]

SERVER="Server Path"

CLIENT="Client Path"

SERVER_NAME="Server Name"
```

```
[OPTIONS]

SERVER=TRUE or FALSE

CLIENT=TRUE or FALSE

KB=TRUE or FALSE
```

The meaning of each line of the INI is as follows:

- SERVER - This is UNC or drive letter path where the DDS Server is to be installed.
- CLIENT - The UNC or drive letter path where the DDS Client is to be installed.
- SERVER\_NAME - Name of the DDS Server that is being installed for a new installation.
- SERVER - TRUE, perform a DDS server installation. FALSE, do not install the DDS Server.
- CLIENT - TRUE, perform a DDS client installation. FALSE, do not install the DDS client.
- KB - TRUE, install the DDS knowledge base. FALSE, do not install the DDS knowledge base

The INI file for a DDS Server installation might look like the following:

```
[PATH]

SERVER="C:\Program Files\Common Files\BSI Shared\Document Services"

CLIENT="C:\Program Files\Common Files\BSI Shared\Document Services"

SERVER_NAME="DDS-Server-Name"


[OPTIONS]

SERVER=TRUE

CLIENT=FALSE

KB=TRUE
```

**Note:** All lines in the INI files are required for all types of DDS installation; do not delete any lines or leave lines with blank values. All lines also require a value even if that value will not be used during the silent installation.

It may be necessary to create multiple INI files if you are doing multiple installations, one INI file for client installations (SERVER=FALSE, CLIENT=TRUE, KB=FALSE) and one for server installations (SERVER=TRUE, CLIENT=TRUE, KB=TRUE). The INI files can be named to reflect their task, for instance, DDSclient\_install.ini and DDSserver\_install.ini. If SERVER=TRUE in the INI file used for client installation, multiple DDS servers will be installed at your institution.

## Command-Line Installation

To perform a silent installation of DDS from the command-line create an INI file as described earlier. From a command prompt, cmd.exe, or from within a script, use the following command, where X is the location of the drive letter of the location of Setup.exe:

```
X:\Setup.exe /f=c:\DDS\DDSserver_install.ini
```

The /f switch specifies the location on the INI file. This example assumes installation is from the root of a CD/DVD drive with the INI file located on the DDS folder of the local hard drive.

If errors are encountered, the silent install will return:

- The Client path is not in the INI
- The Server path is not in the INI
- The Server Name was not in the INI
- The INI file does not exist in the path passed in

**Note:** Returned errors will not be displayed on the screen. If you wish to capture error information for debug purposes and are using Wise installation software to create a customized integrator installation, the INSTALL\_RESULT variable will contain the return value.

## Uninstallation

To uninstall DDS Server or Client, open Control Panel and choose **Add/Remove Programs**. The DDS installations are listed as:

- Dynamic Document Solutions Client Component
- Dynamic Document Solutions Server Component

The uninstallation removes most of the files, folders, registry entries, and the start menu shortcuts that were placed during the installation of DDS. However, some files are left behind in the **BSI Shared** folder as part of the uninstallation.

## Support Services

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

## Appendix A: Secondary Data Capture

**[Updated installations only]** If you have the DDS\_SDC database already configured, you can skip this appendix. All data and connections should be retained by the upgrade to this latest version.

**[New installations only]** If you currently do not have the DDS\_SDC database created, but want to retain your SDC information, use the instructions in this appendix to create a database for SDC data storage. Creating the database is required to retain SDC data.

### New SDC Database Setup

1. Create a new user account in Windows from Control Panel, Administrative Tools, Computer Management, with the following information:

- Username: DDS\_USER
- Full Name: DDS local user account
- Description: Account used by DDS to access SQL Server
- Password:

**Note:** You will need to follow your company policy for setting passwords.

2. Perform the following:
  - Clear the check box labeled User must change password on next login
  - Select the check box labeled User cannot change password
  - Select the check box The Password never expires
  - Clear the check box Account is disabled
3. From SQL Server, create a new database named DDS\_SDC. Set an initial size of 100 MB on both the data file and transaction log and set each to grow by 50 MB.
4. Create a new login on SQL Server using the following information:
  - Login Name: Select the DDS\_USER account created in step 1
  - Default Database: DDS\_SDC
  - Database Access: DDS\_SDC
  - Permit in Db Roles: db\_datareader and db\_datawriter
5. From the SQL folder on the installation CD, open the DDS\_SDC.sql script with Query analyzer. Execute the script.

6. Add a new ODBC System DSN from Windows Control Panel, Administrative Tools, Data Sources, System DSN tab, using the following information:
  - Driver: SQL Server
  - Name: DDS\_SDC
  - Description: <optional>
  - Server: <name of your SQL Server>
  - Verify Authentication; With Windows NT authentication
  - Check the Connect to SQL Server to obtain default settings for the additional configuration options check box
  - Change the default database to DDS\_SDC.
7. Open the dds.props file with a text editor. The file is located at Program Files\Common Files\BSI Shared\Document Services\Jigsaw\config. Three entries require editing:
  - dds.processor.dsname= DSN Name from Step 5
  - dds.processor.dbusername=DDS\_USER, defined in Step 1
  - dds.processor.dbpwd = Your password, defined in Step 1
  - dds.processor.dbconnectiontimeout=15
  - dds.processor.dbquerytimeout=60
8. Stop and restart the BSI DocServices service.

About Wolters Kluwer Financial Services - Whether complying with regulatory requirements or managing financial transactions, addressing a single key risk, or working toward a holistic enterprise risk management strategy, Wolters Kluwer Financial Services works with more than 15,000 customers worldwide to help them successfully navigate regulatory complexity, optimize risk and financial performance, and manage data to support critical decisions. Wolters Kluwer Financial Services provides risk management, compliance, finance and audit solutions that help financial organizations improve efficiency and effectiveness across their enterprise. With more than 30 offices in 20 countries, the company's prominent brands include: AppOne®, ARC Logics®, AuthenticWeb™, Bankers Systems, Capital Changes, CASH Suite™, FRSGlobal, FinArch, GainsKeeper®, NILS®, TeamMate®, Uniform Forms™, VMP® Mortgage Solutions and Wiz®. Wolters Kluwer Financial Services is part of Wolters Kluwer, a leading global information services and solutions provider with annual revenues of (2013) €3.6 billion (\$4.7 billion) and approximately 19,000 employees worldwide. Please visit our website for more information.

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

To learn more visit [WoltersKluwerFS.com](http://WoltersKluwerFS.com).

© 2013 Wolters Kluwer Financial Services, Inc. All Rights Reserved.