



Financial Services

Installation Guide

Medici™ Commercial Lending Documentation System
Version 2018.2.1, 2018.1.2, and 2017.1.5

Financial Services

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Introduction

Welcome to the instructions for installing Medici release 2018.2, 2018.1.1, and 2017.1.4. This guide addresses new installations as well as updating existing Medici installations, from 2012.2 or higher.

Note

The instructions for updating from versions prior to 2012.2 are substantially different than updating from Medici 2012.2 or higher. Call **Medici Support** at 1-800-274-2711, ext. 1125343 before proceeding.

All types of Medici implementations are covered: server, client, and standalone. You can successfully install this Medici release on your own using these instructions.

Important

Wolters Kluwer has made every effort to ensure an error-free installation. However, if you encounter an error message during installation, call **Medici Support** at 1-800-274-2711 ext. 1125343 before proceeding.

Summary for Upgrading Medici

Updating from Medici 2012.2 or Higher

Your upgrade will proceed along these lines:

- Review system requirements to make sure you are up-to-date with all prerequisite software
- Perform and complete pre-install tasks, including the backup of your database and critical files
- The minimum database version is 2012.2. If the database version is less than 2012.2, you will need to update the Medici database to 2012.2.
- Install the new version of Medici (no previous release uninstall required)
- Perform some post-install configuration

Summary for New Medici Installation

If you have not already, please make sure your choice of equipment for your Medici system is supported by reviewing the system requirements. You should also have made the decision about your system and network configuration, that is, whether you are doing all of your Medici work on a single standalone workstation or working in a more complex environment with server and database servers and multiple clients. Please visit [Appendix F](#) for more details on available configurations and their capabilities if you need to.

Your new Medici installation will proceed along these lines:

- Review and complete pre-install tasks
- Install the latest version of Medici
- Perform some post-install configuration

System Requirements

The latest hardware requirements and list of supported Windows operating systems for each implementation of Medici can be found on the SupportLine web site,

<http://www.wolterskluwerfs.com/software/product/?pid=10737425554> Other required software is also listed.

Note: Only the 32-bit version of Microsoft Office is supported. The 64-bit version of Microsoft Office is not supported and cannot be used with Medici at this time.

Installation of .NET 4.6.2 or higher is required and must be installed prior to the update and for new installations.

You can install .NET 4.6.2 using the web installer at <https://www.microsoft.com/en-us/download/details.aspx?id=53345> or the full installer from <https://www.microsoft.com/en-us/download/details.aspx?id=53344>.

A free .NET verification tool is available from Microsoft at <http://blogs.msdn.com/b/astebner/archive/2008/10/13/8999004.aspx>. You can use this tool to verify the presence or absence of a particular version of .NET Framework on your machine.

SQL Native Client 11 is required to support TLS 1.1 or 1.2. This client is already automatically installed as part of newer SQL Server versions (2012, 2014, 2016 and so on). For other versions it is available at <https://www.microsoft.com/en-us/download/details.aspx?id=50402>.

Security Settings in Some Operating Systems

You may receive an operating system warning during installation if your current security settings are preventing the installation of Medici. You may also receive these same warnings when you try to open Medici. You may need to revisit user permissions or security policy for your operating system before installing or using this release of Medici.

Special Configuration Required for HMDA Wiz

For HMDA Wiz users, you will need to enable TLS 1.2 as well as Strong Cryptography for your Medici Client machines. Additional information on how to enable TLS 1.2 can be found at <https://docs.microsoft.com/en-us/dotnet/framework/network-programming/tls#configuring-security-via-appcontext-switches>.

Pre-installation Tasks

To install Medici successfully there are a number of pre-install tasks that must be performed first, such as setting a number of permissions and other configurations. The list of tasks is different for an existing install upgrade and a new install.

Database Backup

Even though the Medici installation is designed to leave your existing database intact, we highly recommend that you backup your existing Medici database before you install this upgrade. Use the **Back Up** task present in your version of SQL Server to back up your database.

Transactions Backup

We recommend that you backup your existing Medici DMTransaction folder before you install this upgrade.

Delete Numerical DMTransaction\Documenter Update Folder\Subfolders

Important

If you are upgrading from any previous version, you **must** delete all the numerical folders found within the DMTransaction\Documenter Update Folder\ location.

Custom Files Backup for Disaster Recovery

For disaster and recovery, a number of files used by Medici should be backed up before installing this release.

Server Files and Folders

Create a new folder on the same drive as your Medici server named **DR Custom Server Files**. Copy the following files from your existing Medici installation to this **DR Custom Server Files** folder:

- Multiple files in the MediciServer folder:
 - DMLic.lic – Your Medici license file
 - NumToText.XML (if available)
 - Server.ini
- Userdocs folder (if available)
- Encryption Key location – The location of this folder is specified in server.ini, located in the MediciServer folder. Note this folder location as you will be asked for it during the server install. All the files in this folder should be backed up.

Important

If you are not sure about the location of your Encryption Keys folder, contact **Medici Support** at 1-800-274-2711 ext. 1125343 or technicalsupport@wolterskluwer.com before proceeding. Backup is imperative since if for any reason you lose your keys, or they become corrupted, Wolters Kluwer cannot recover them, and any data encrypted using those keys cannot be decrypted.

Client Files and Folders

On one of your client machines, create a new folder on the same drive as your Medici client named **DR Custom Client Files**. Copy the following files from your existing Medici Client installation to this **DR Custom Client Files** folder:

- Multiple files in the MediciClient folder:
 - CustomNPI.xml
 - LW.ini
 - Macros.ini
 - RMDisplayVars.xml
 - PDFSettings.xml
- In the MediciClient\Databases folder:
 - Mbnk.mdb
- Multiple files in the MediciClient\Word Automation folder:
 - Amort.xls
 - Bank_FindReplace.mdb
 - BankSpecific.dot
 - BankUseOnlyText.rtf
 - UFormat.ini
 - Any and all .bmp files, that is, logos

Note

Please be aware that we are no longer shipping discs containing custom content as the upgrade process preserves all customizations. If you require a copy of your custom content please, contact Medici Support.

Operating System Permissions

The person installing Medici will need to have Administrator user permissions on the Windows operating system where the installation is being performed.

Database Permissions

Database permissions and users that you established for earlier versions of Medici will work with this release. Note the credentials chosen at install time will need to have the DB_Owner access at a minimum to the database being upgraded, and **sysadmin** permissions on the SQL Server to upgrade an existing Medici database. These roles are only required during the upgrade process.

The application server's SQL credentials will need DB_reader and DB_writer access to the SQL database.

Database Backup File Location

A database file containing the details of your institution was created for you as part of the product purchase. You will need this file and its location during the Medici installation.

Note

If you are performing a remote Medici database install, the SQL Server service account must be granted access to the share where the database file is located. This service account is not the same account as your SQL Server login.

License File

As part of your product purchase you should have obtained a Medici License Key file, DMLic.lic.

Store the Medici License file at a location where it can be easily accessed by the installation program. You will be required to enter the location of the file during the installation of the server.

Medici Encryption Keys

Encryption keys are used to encrypt and decrypt your database information and other sensitive client data that the application may use. Create a folder to house your Encryption Keys. An example folder name is MediciKeys. Locate the Encryption Key folder on the same machine as the Medici Application Server. Note this folder location as you will be asked for it during the server install.

You must have full control over the folder location during the installation, because Medici needs to write and save files in this folder.

Warning!

For security reasons, Medici creates your key files for you as part of your product purchase process. Once this process is complete, immediately make a backup of the files. If the files are lost or become corrupted, you lose access to your data within the system, such as customer information, transaction passwords and so on.

If you lose your files or they become corrupted, Wolters Kluwer is not able to provide assistance in decrypting your data. The keys are unique to each institution.

Operating System Permissions – New Installation

The person installing Medici will need to have Administrator user permissions on the Windows operating system where the installation is being performed.

Database Permissions – New Installation

The installing user should have the **sysadmin** rights within SQL Server to create a new Medici database. You should have remote SQL permissions to perform a remote database installation.

Note

These permissions are needed by the login being used for SQL Server access. These permissions must be granted to that login on the SQL Server instance where the install is being performed.

DMTransaction Path

Medici uses the DMTransaction folder to create the transaction files and output documents for all loan transactions. Prior to the installation, you must create a DMTransaction folder. This folder can be created on your local machine if you are doing a standalone installation.

If you want to share the transactions across a network on a network share for multiple Medici clients, you will need to create the DMTransaction folder on a shared network resource, for example, \\Fileserver\Sharename\\. When creating the folder, you need to have full control permissions to the DMTransaction folder and subfolders, and the DMTransaction folder must be shared. Additionally, each Medici user needs to have the same network access permissions to this folder so all Medici clients can see and access documents generated by all other clients.

Note

Any machine that houses the DMTransaction folder needs to have its free disk space monitored on a routine basis. The transaction files increase in direct relation to the number of loan documents created.

Installing Medici

The installation will be similar whether you are beginning with a new installation or are upgrading an earlier version of Medici. The Medici installation will collect information in the following order:

- Install Choices
- Database (if selected)
- Server (if selected)
- Client (if selected)
- Finishing the install
- Post-install configuration

Note

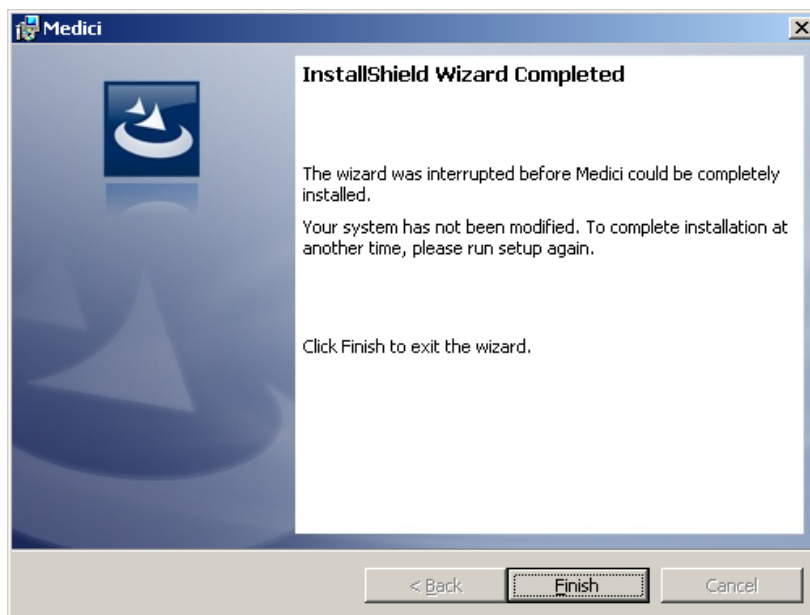
If these features are spread across multiple machines for your Medici configuration, you will need to install the features in the following order: Database, Server, Client.

The choices you make as to which features to install will depend on your selected or existing configuration. If your server and database are hosted on separate machines, you will need to only install the needed features. For standalone installations, you will need to install all three features. For server configurations on a network, your client machines of course only need the client.

Canceling or Interrupting the Medici Install

You have the option to cancel or to interrupt the Medici installation, both new and upgrades, over the course of the installation. Click **Cancel** or the **X** Windows control available on the top right corner any of the installation screens. You will receive a message asking you to confirm that you wish to cancel the installation.

You may also receive a notice the install has been interrupted after you receive a message that one of the prerequisite software requirements is not present. You will need to correct the problem and restart the installation.



Click **Finish** to exit the installation.

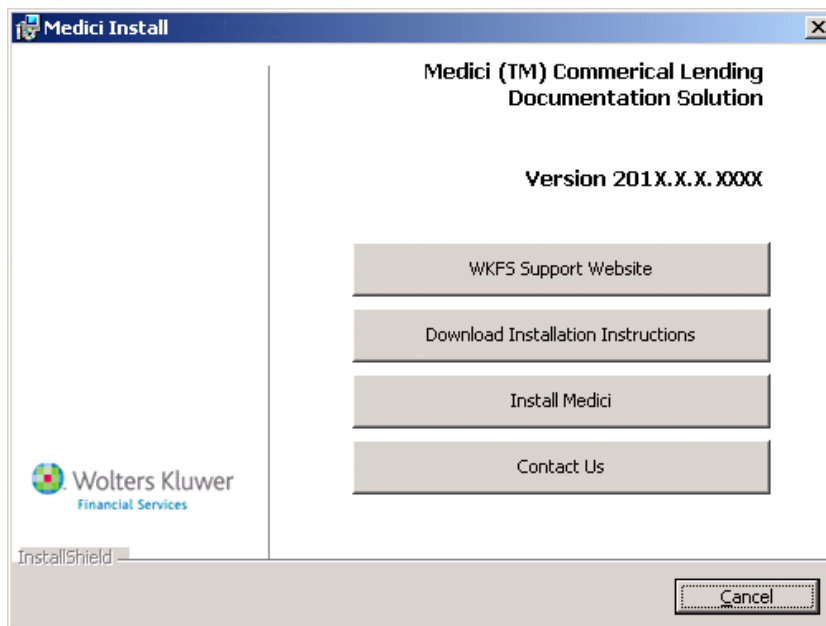
Install Choices

1. To begin the installation for Windows Server 2012 or later and Windows 8 or 10, right-click the ISO you downloaded for the latest release, **Medici_201x.x.x.xxxx.iso**, and select **Mount**.

Note

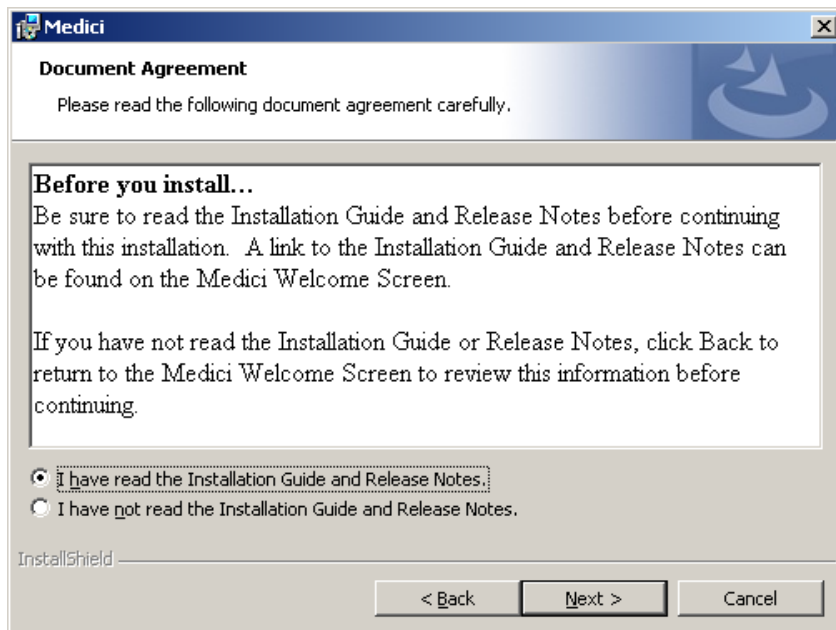
Windows 7 and Windows Server 2008 cannot natively mount an ISO as a virtual drive. If you do not already have an in-house solution for mounting an ISO with these operating systems, you will need to download an application to provide this functionality.

2. From the root of the mounted virtual drive, right-click **Medici_Setup.exe** and select **Run as Administrator**.
3. The installation program will check if Microsoft .NET Framework 4.6.2 or higher is installed. The installation will halt if this prerequisite is not installed. Please visit the [System Requirements](#) section of this guide.
4. The Medici Install window will display followed shortly by the installation **Welcome** window.

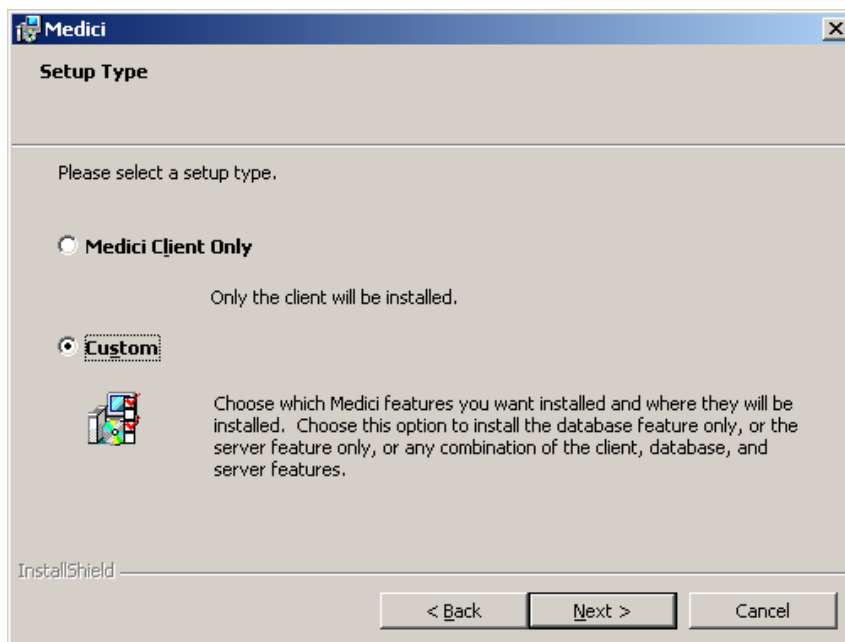


Please continue to read this Installation Guide as well as the Release Notes before proceeding with the installation. If you have any questions, click **Contact Us** for mailing, phone, fax, and web-based contact options. When you are ready to continue the installation, click **Install Medici**.

5. To proceed with the installation, you must accept the Documentation Agreement indicating you have read the release documents.



6. Click **Next**.
7. Select the Setup Type for your installation. If you are upgrading from 2010.1 or higher you will not see this screen.

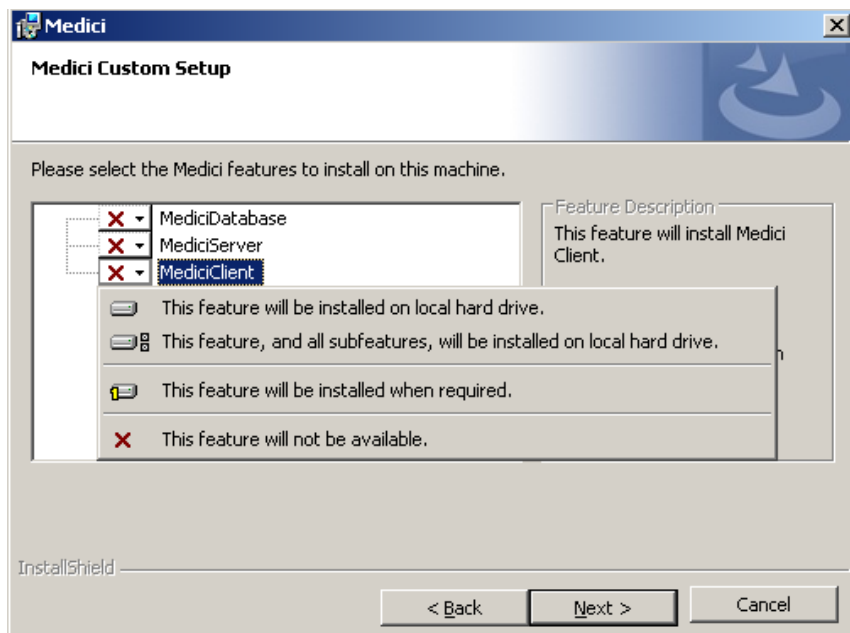


Each selection will give you different installation options:

- **Client.** This choice will install only the Medici Client. If you choose to install only the Medici client, proceed directly to [Medici Client Installation](#) for more details.
- **Custom.** This choice will be used to install different configurations of Medici server, database, and client. It allows you to select the individual feature you want to install or to select any combination of the features you want to install.

Click **Next**.

8. Select the desired features that you want to install or upgrade. This screen only appears, if you selected **Custom**. If you are upgrading from 2010.1 or higher you will not see this screen.



Important

You must select all of the features you wish to install at the same time from this screen. If you install only one feature and then decide to install another later, you will first have to uninstall your original choice and re-install it along with your additional choice. It is important to understand the server/client/database configuration you wish to install or upgrade before selecting.

When considering how to install each feature note that only the MediciDatabase feature can be upgraded remotely. The MediciServer cannot be upgraded remotely and must be installed machine-side. The MediciClient cannot be upgraded remotely and must be installed machine-side. The table below indicates which features to select for various Medici configurations:

Standalone	Select all three features: MediciDatabase, MediciServer, and MediciClient.
Remote database with server/client on another machine	Select all three features: MediciDatabase, MediciServer, and MediciClient.
Separate database and server	Install the server at the server machine. The database can also be remotely installed from the server machine at the same time. Choose MediciDatabase and MediciServer. Do not choose MediciClient.
Database only	The database can be remotely installed from any machine or at the machine hosting SQL Server. Choose MediciDatabase only.
Server only	Install the server at the server machine. Choose MediciServer only. Do not choose MediciClient.
Client only	Choose only MediciClient and install at each client machine.

Choosing only the client feature will install just the Medici client. This option is the same as selecting Medici Client Only on the earlier **Setup Type** screen.

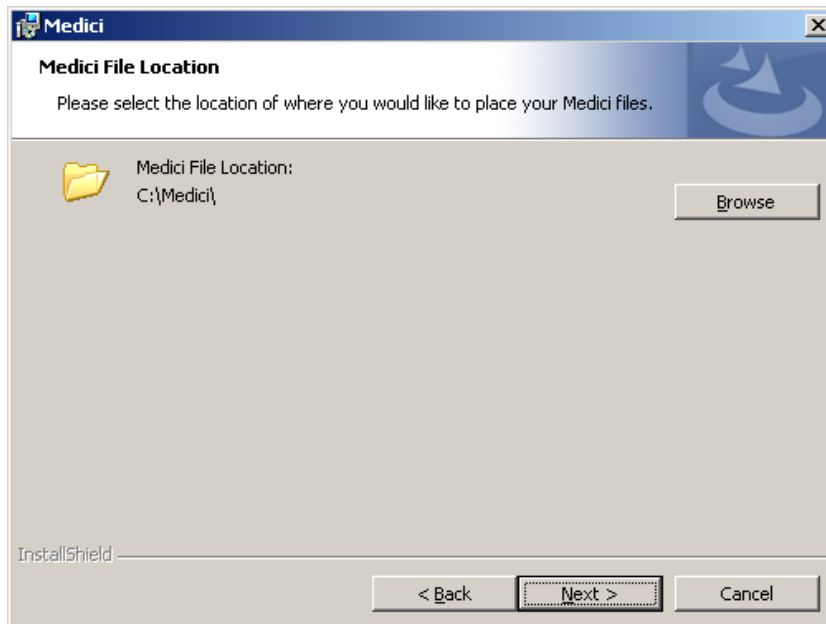
Note

If you are doing a client-only installation, please proceed directly to the [Client Installation](#) portion of this guide.

Note

If you receive an error indicating the SQL Native Client 11 is not installed, you will need to **Cancel** the installation. Please visit <https://www.microsoft.com/en-us/download/details.aspx?id=50402> to download the SQL Server Native Client 11. After installing it, restart the Medici installation.

9. Browse to the location where you want to install Medici on your system. If you are upgrading, you may not see this screen; the installation will use your existing file location.



Depending upon your configuration choices, the following folders will be created:

- Medici Client <User Selected Location>\MediciClient
- Medici Server <User Selected Location>\MediciServer
- Medici Database <User Selected Location>\MediciUpgradeFiles

Note

If you are installing onto a 64-bit operating system, you cannot choose a 64-bit designated file area for the installation of Medici. You must choose a 32-bit compatible area.

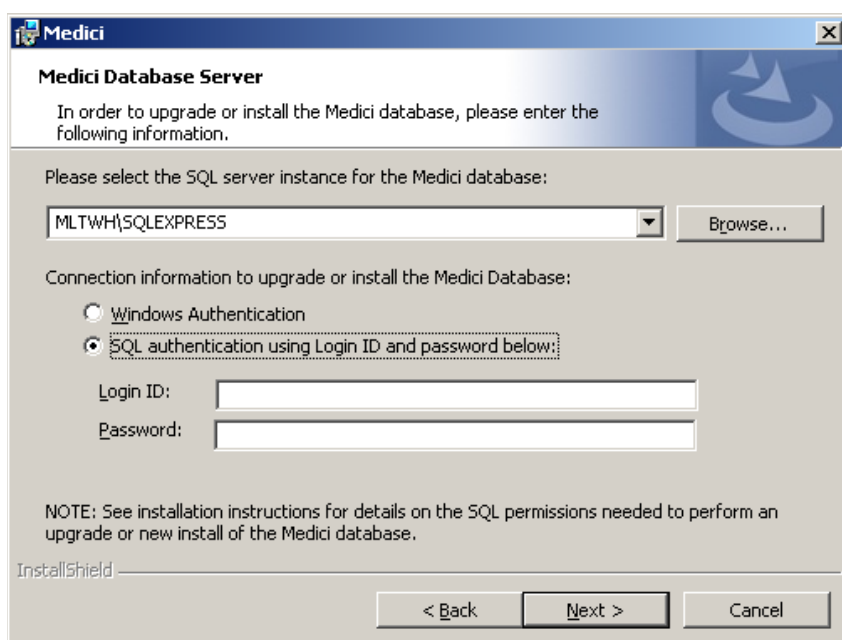
10. Click **Next**.

From this step onwards the installation will proceed on the basis of the choices you made on the **Setup Type** and **Medici Custom Setup** screens.

Database Installation

This section applies to both new and upgrade installations for the database.

1. Select the existing local SQL server instance from the drop-down for creating or upgrading a Medici database or **Browse** to the instances on the network. You can also type in the name of the SQL server instance. Note that the instance path should include the machine name hosting it.



Select the authentication type you use:

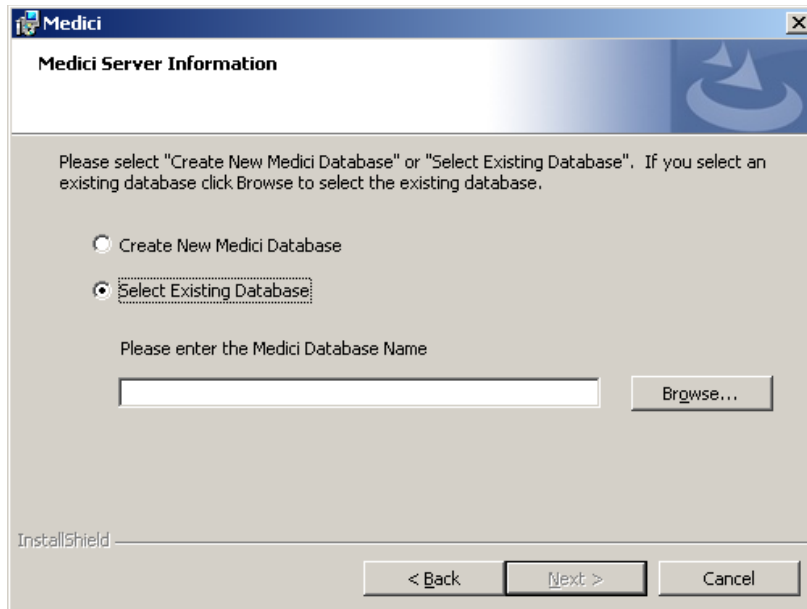
- Windows Authentication. The credentials of the user currently logged into the machine from where this install is being performed will be used. This option is selected by default.
- SQL Authentication
 - Login ID: Login ID must be a valid SQL Server Login that has access rights to the Medici SQL Server Database.
 - Password

For an existing database upgrade, the credentials entered must have "DB_Owner" rights at a minimum on the database being upgraded and **sysadmin** on the SQL server.

For a new install, the credentials entered must have **sysadmin** rights

Click **Next**.

2. The install will verify the SQL Database connection and will display one or more error messages if a connection cannot be made. You will need to edit your login or authentication type until the verification is successful.
3. Next you will be asked to select **Create New Medici Database** for new installs or **Select Existing Database** for upgrades.

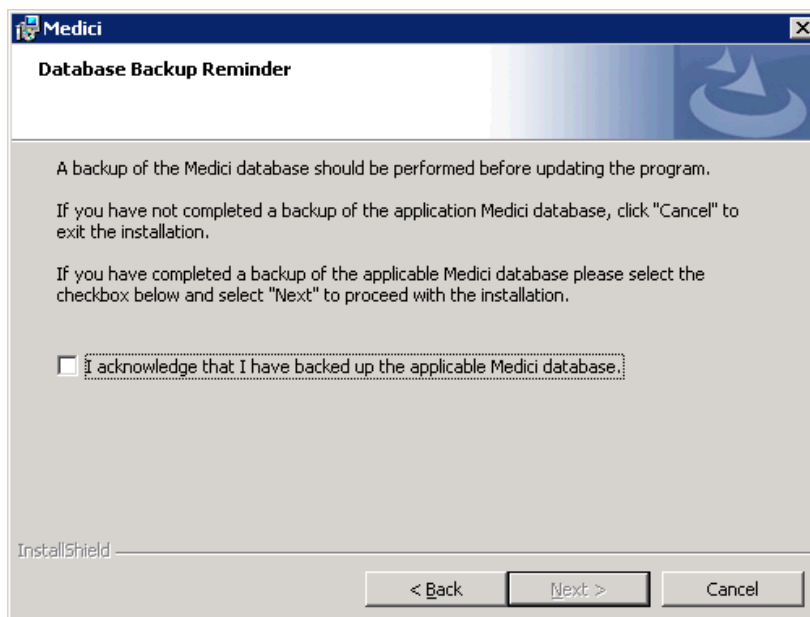


If you are doing a new install, you will select **Create New Medici Database** and proceed to the [For New Databases](#) section of this guide for the next steps you need to perform after clicking **Next**.

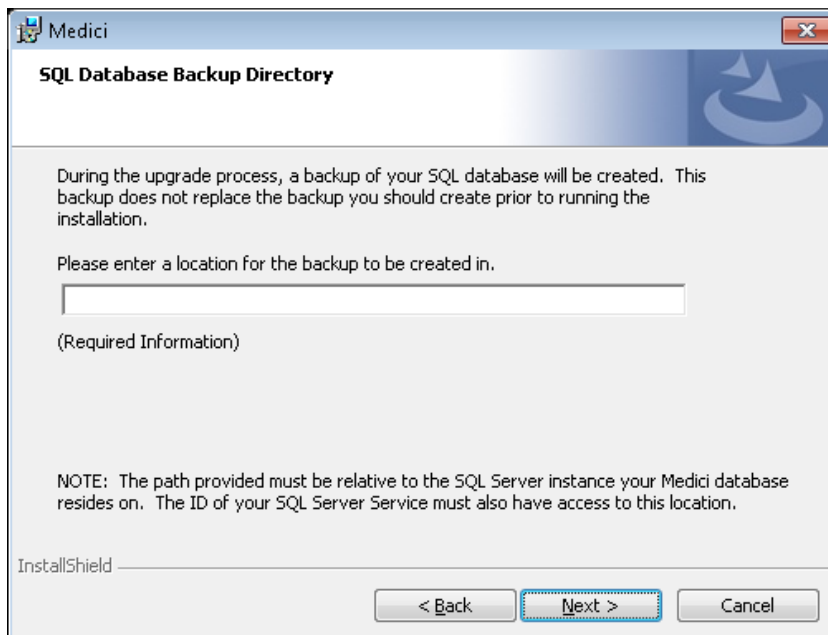
If an existing database is chosen, you will need the database catalog name. Click **Browse** to locate an existing database from the SQL server instance. The minimum database version is 2012.2. If the database is less than 2012.2, an error warning displays, and the installation is interrupted.

Click **Next**.

4. On selecting a database for upgrade, the install will verify if it is a valid Medici database. If it cannot verify the database, you will receive an error. Please review your database selection and try again. Once the verification is successful, the install will ask to verify that a backup of the database has been created prior to proceeding. After confirming that the database has been backed up, select the acknowledgement checkbox. Click **Next**.



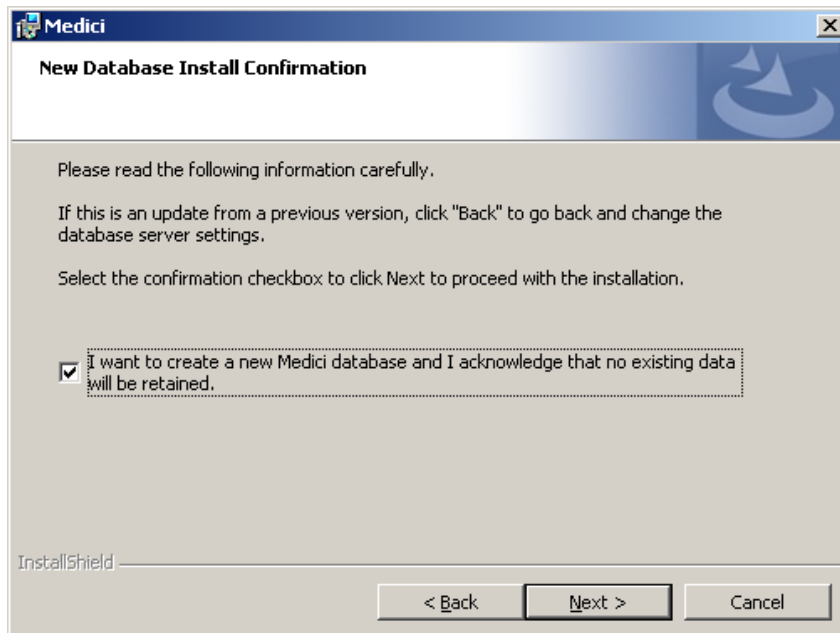
5. Enter a location for a backup of your SQL database. The path must be relative to the SQL Server instance your Medici database resides on. The ID of your SQL Server Service must also have access to this location. Click **Next**. This does not replace the backup you should have created prior to installation.



This completes the database feature install data collection for Medici. If you are doing an upgrade database-only install, you will receive the **Ready to Install** screen. If you are doing a new database install, you will proceed with your new database installation. If you are also installing the Medici application server you will proceed to collect the information needed for the [Server Installation](#).

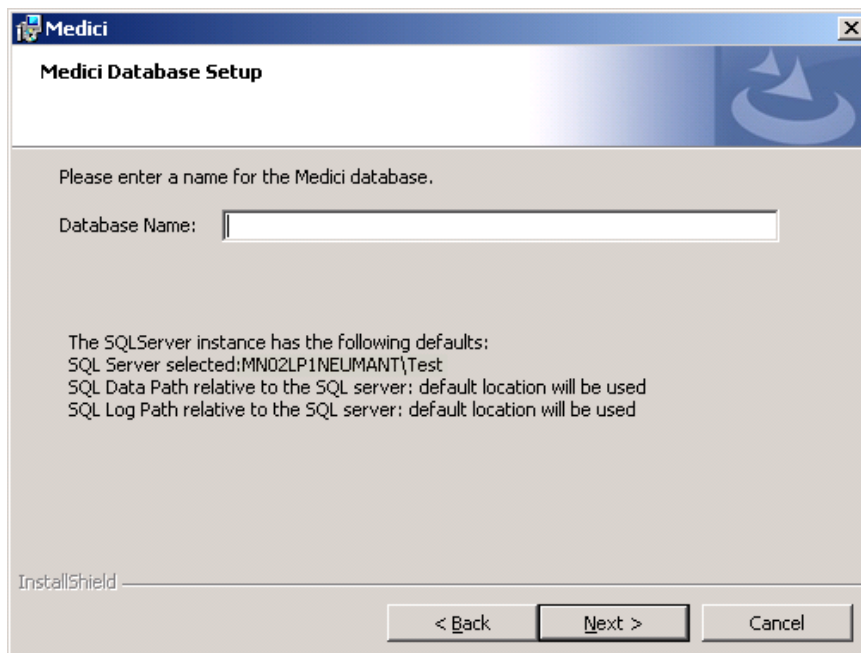
For New Databases

1. After you have indicated you want to create a new Medici database, you will need to acknowledge that you are creating a new database and not attempting to upgrade a previous installation.



Click **Next**.

2. Enter the name of the database you want to create for the Medici application.



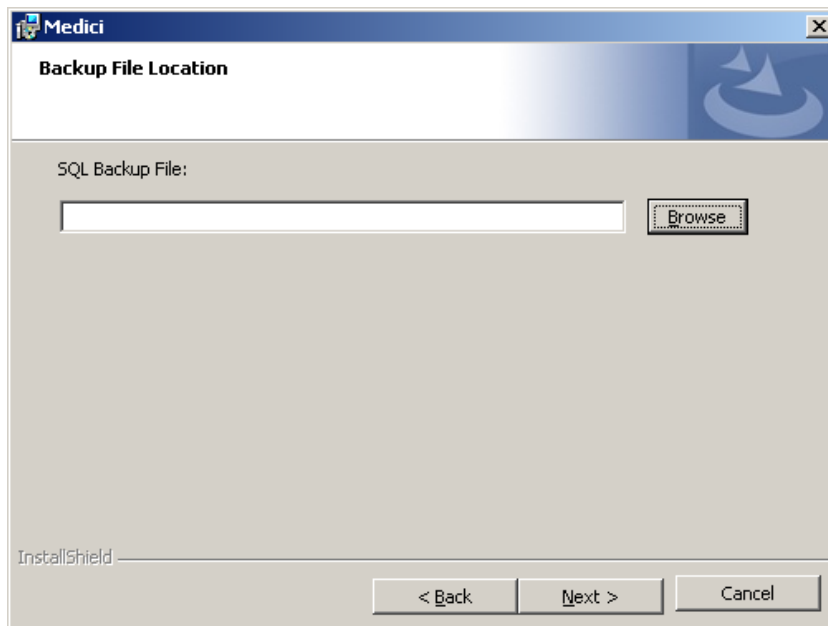
The screen displays the fully qualified SQL Server instance name where the Medici database will be installed.

Also note the SQL Data and SQL Logs will be created in SQL Server's default location. Click **Next**.

3. Browse to the location of the database backup file, with extension .bak, created for your install by the Wolters Kluwer Professional Services as part of the purchase process.

Note

If the .bak file is on a separate machine, you must have access permissions to it. The user profile under which the SQL Server instance is running needs access to this location. The user profile the install is running under, likely your own, does not need access to this location.



The selected backup file will be used during the Medici install to create your Medici database.

Click **Next**.

4. The install will check if the selected backup file is valid and will display an error message if the selected file is not a .bak file or you do not have permissions. Please make corrections and proceed again.

This completes the new database feature install data collection for Medici. If you are doing a database-only install, you will receive the **Ready to Install** screen and can proceed with your database installation. If you are also installing the Medici application server you will proceed to collect the information needed for the Medici application server.

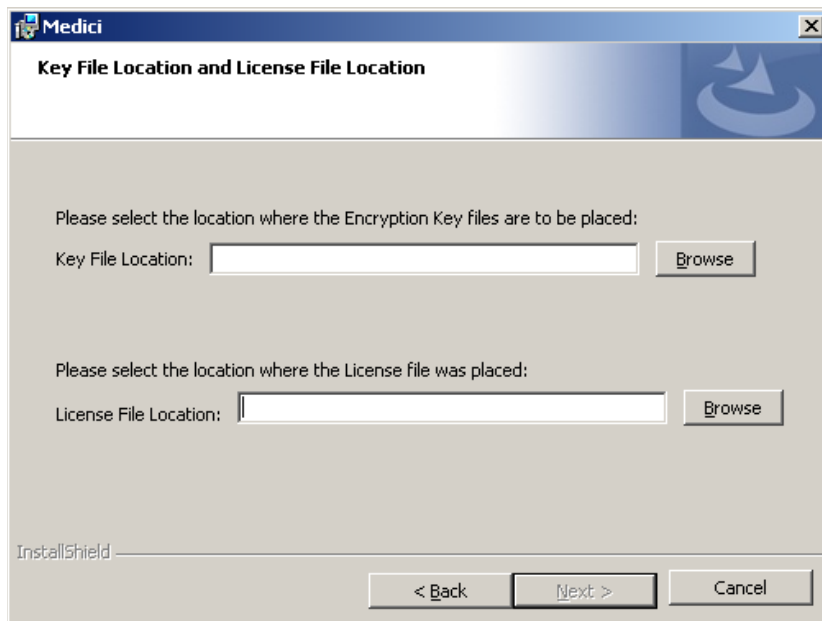
Server Installation

The Medici server installation process and steps are applicable if you have chosen to install the Medici Server feature on the **Medici Custom Setup** screen. This applies to both new and upgrade installations.

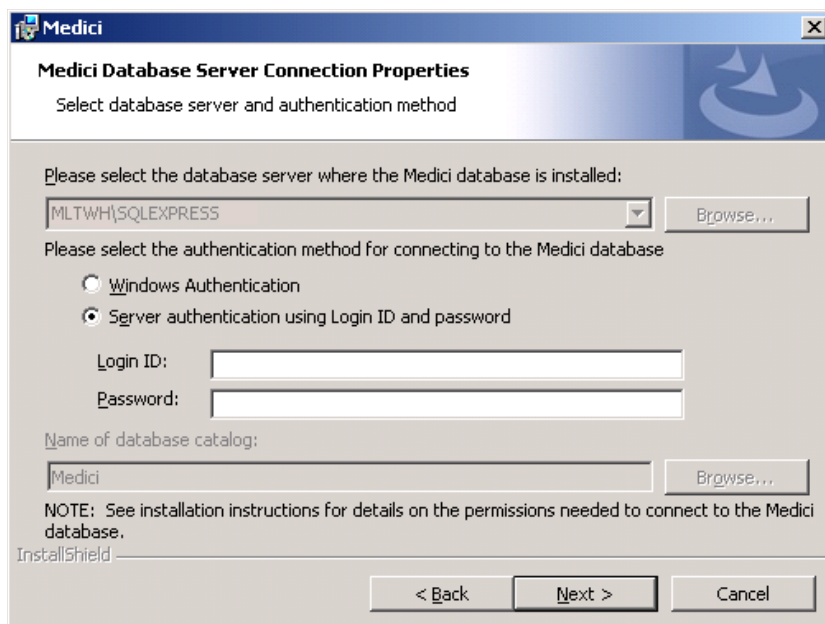
Note

For a new installation a version of SQL server or SQL Server Express must be installed and accessible during the server install. The Medici server requires this connection and the installation will fail without it.

1. As noted in the pre-installation section of this guide, you will need the location for your Encryption Key files and the file location for your license file. This information is required for both new and upgrading institutions. Use **Browse** to navigate to the locations. If you are upgrading, you may not see this screen since Medici already knows the location for these files.



2. Click **Next**. The install will check for both the Encryption Key folder and the License file. You will receive an error if either is not found. You may need to edit your path.
3. Once the Encryption Key folder and license file are verified, you will be asked for the name of the SQL Server instance hosting the Medici database. Use the drop down list to select an instance on the same machine running the install, or use **Browse** to select other network locations. Note that in all cases, if the SQL Server is a named instance, the specific name of the instance must be included.



Note

The option to select the database server and the database catalog will be disabled if you have also chosen to install the database feature, as we have already collected this data. The login credentials gathered here will be used by the Medici application for connectivity.

4. Select the authentication type you want the Medici application to use to connect to the SQL server.
 - Windows Authentication. The credentials of the currently logged in user will be used. This option is selected by default. This same identity will also be the identity used by the COM+ application which you will need to configure after the install is completed.
 - SQL Authentication. The credentials entered into the Login ID and Password fields will be used.
 - Login ID: Login ID must be a valid SQL Server Login that has access rights to the Medici SQL Server Database.
 - Password

The user should have the "db_datareader" and "db_datawriter" permissions on the Medici database.

5. Click **Browse** to select the Medici database from the selected SQL Server. Click **Next**. The install will now verify the SQL connection and will display an error message if the connection is not verified. Edit your connection information until the install can verify a successful connection with the SQL database.

This completes the collection of information needed for the installation of the Medici server. If you are installing the Medici client feature you will proceed to collect the information needed for the Medici client installation, otherwise you will receive the **Ready to Install** screen.

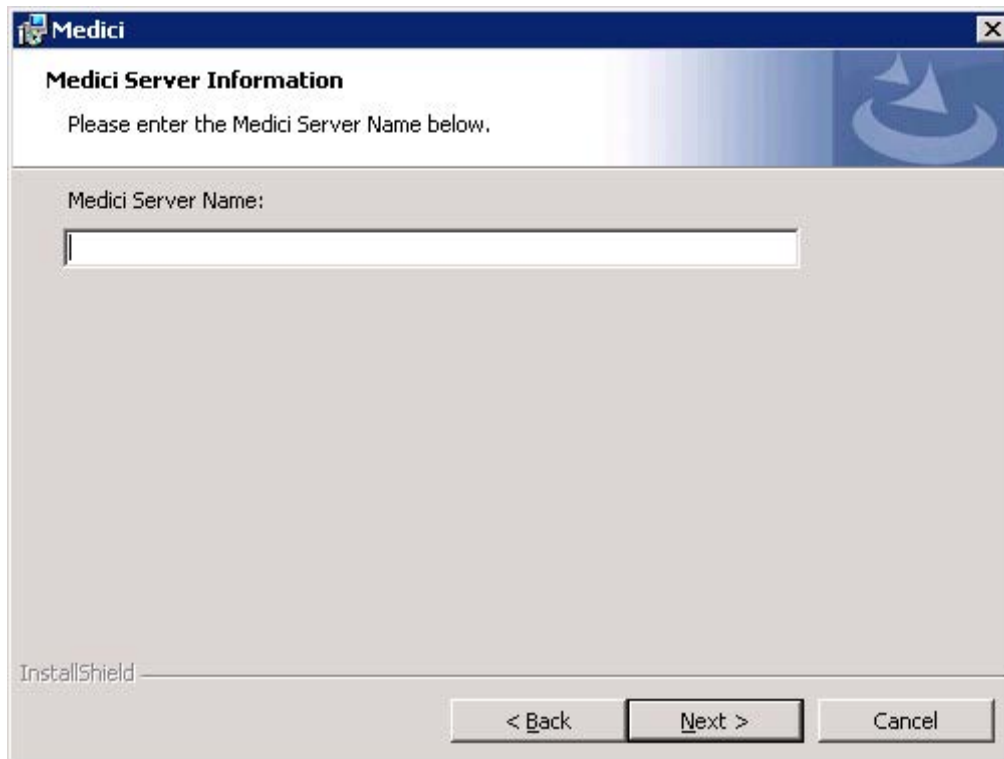
Client Installation

These instructions apply to both new and upgrading institutions. To install the client:

Note

If you selected to install or upgrade the Medici server as part of your installation selection, you will not see the screen in Step 1 since the installation has already collected this information. You will only see the screen in Step 1 if you are strictly installing only the client.

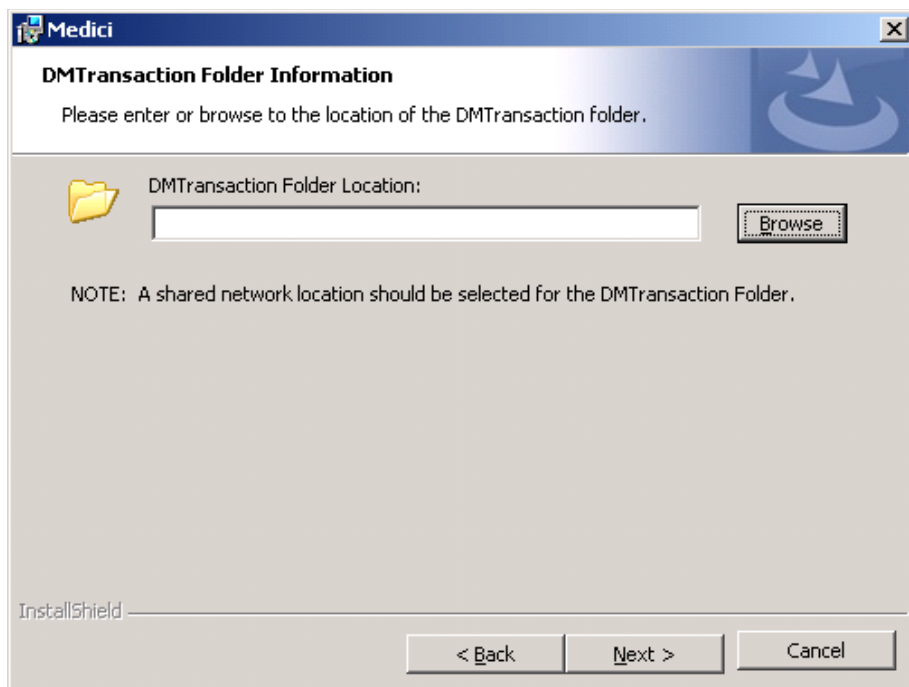
1. Enter the network name or the IP address of the server hosting the Medici server installation.



2. Click Next.
3. Select the DMTransaction folder by clicking Browse. This folder already exists for upgrading users and was created in the pre-installation tasks for new installations.

Note

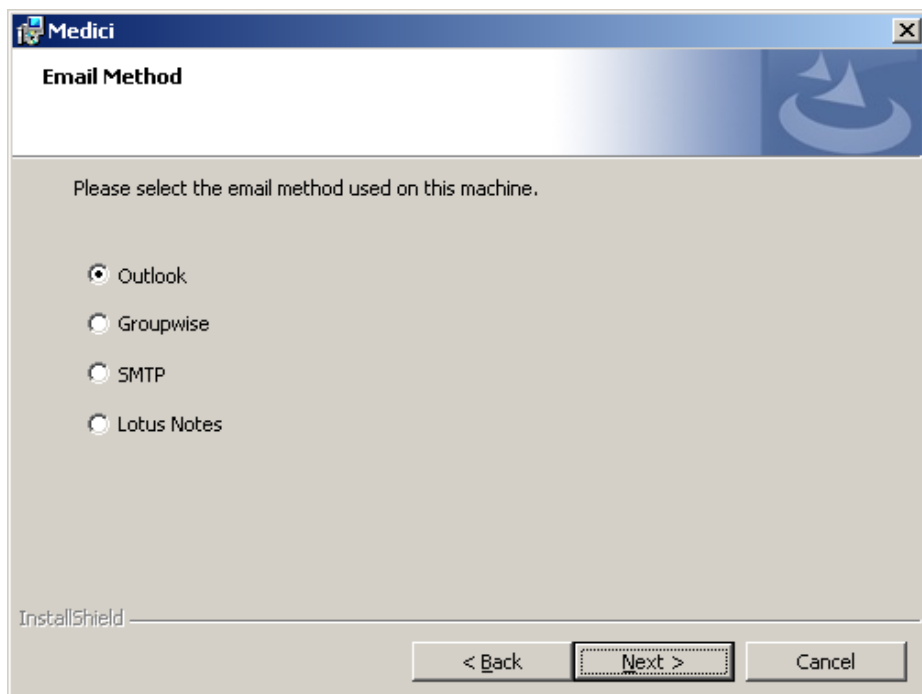
For most configurations the DMTransaction folder should be on a shared network location so all Medici clients can access and share transactions.



4. Click Next.

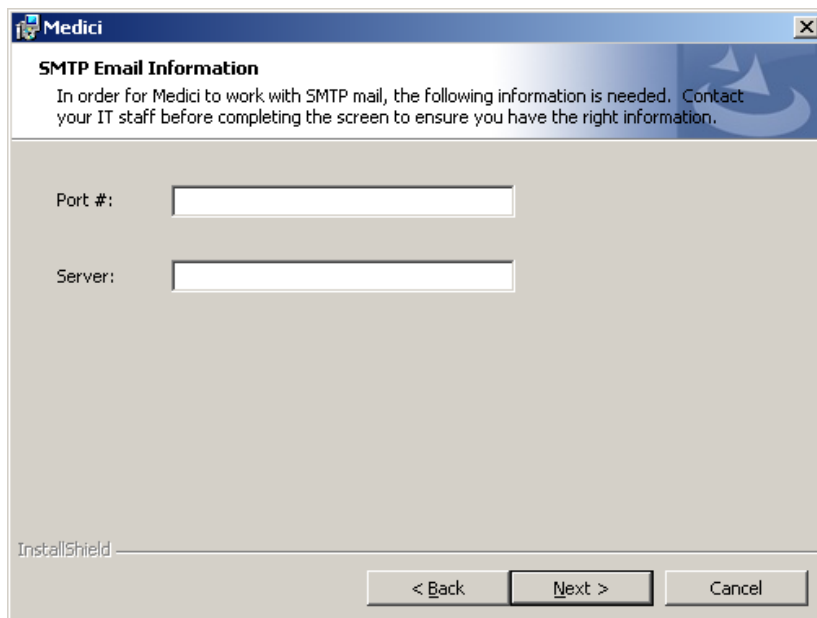
The install will verify if the DMTransaction folder exists and will display an error message if it cannot find the folder or if the installing user does not have write access to the folder. Please make corrections until the verification is successful.

After a successful verification you will next be asked to select the preferred method that you want to use to send emails from Medici.



5. Click Next.

6. If you selected SMTP as the email method on the Email Method screen, you will need to:
 - Enter the port number of the SMTP server in the Port # field.
 - Enter the name of the SMTP gateway or IP address of the server in the **Server** field.

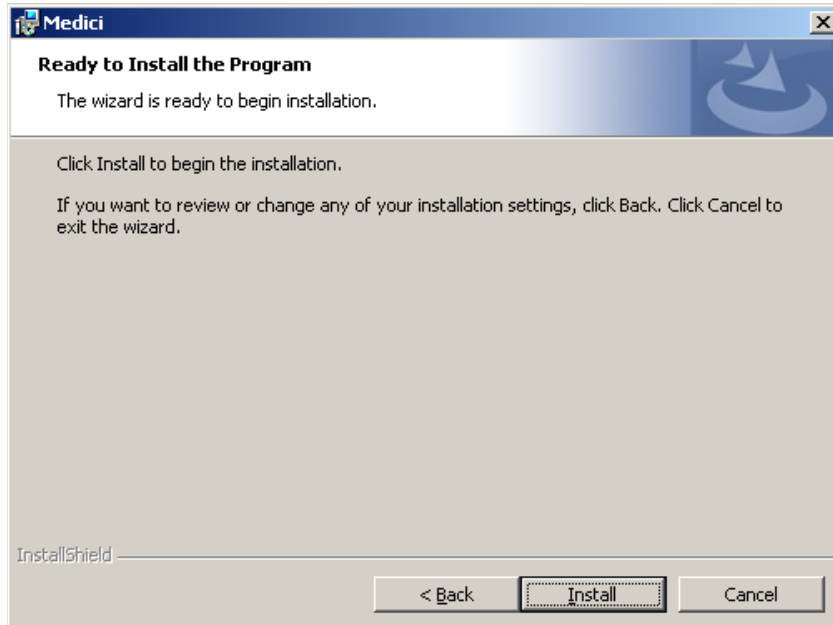


The image shows a Windows-style dialog box titled "Medici". The main heading is "SMTP Email Information". Below the heading, a message states: "In order for Medici to work with SMTP mail, the following information is needed. Contact your IT staff before completing the screen to ensure you have the right information." There are two input fields: "Port #:" and "Server:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a black border. The "InstallShield" logo is visible in the bottom left corner of the dialog box.

7. Click Next to complete the collection of information for the client install.
A few more steps are required for the installation to complete.

Finishing the Install

After entering information for your selected Medici features, you will see the **Ready to Install the Program** screen.



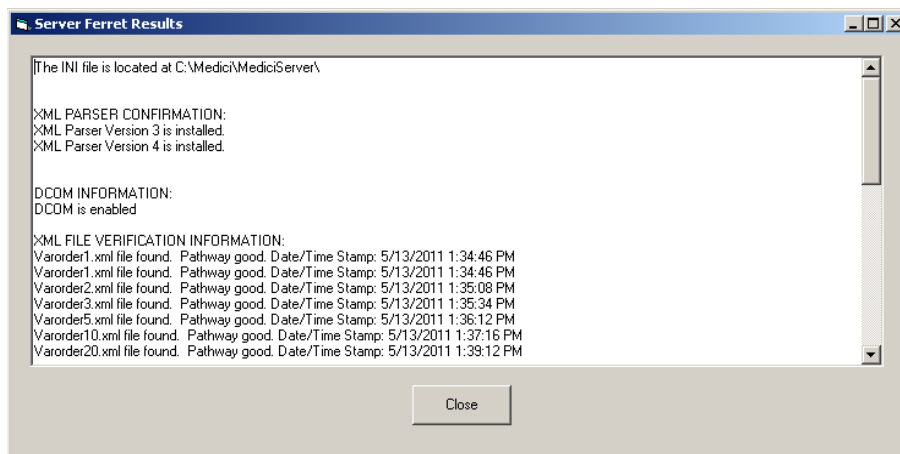
1. Click **Install**. This begins the installation of Medici based on the options you have chosen.
2. For an upgrade, if you selected the Database feature then the install will upgrade your database.



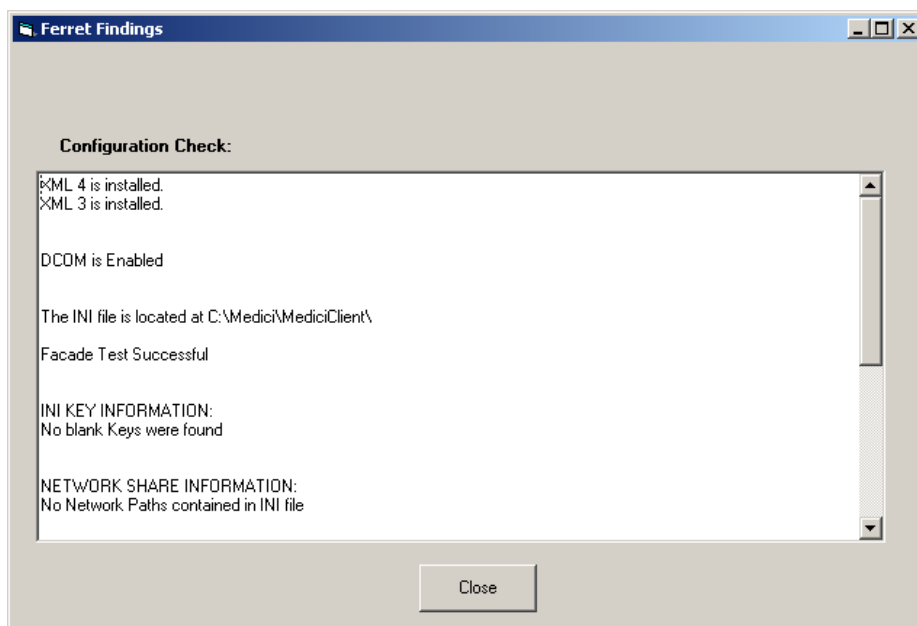
Note

The Medici Upgrade window may appear behind the install screen. You may have to look behind the install screen to see if the upgrade is finished.

3. If your install includes the server feature, you will receive some status information from a utility named Server Ferret. The purpose of the dialog boxes is to give you more detailed information about the Medici server install up to that point.



4. You may also receive some status information labeled Ferret Findings. These are from the SQL Ferret, which is specific to the client installs.



5. Please peruse the information from any ferret, especially looking for any warnings flashing in red text at the top of the box. If you find any, please contact SupportLine. Click **Close** after reviewing and the installation will continue. Do not cancel out of the installation if you receive any warnings.
6. Once Medici is installed, you will see the last screen informing you the installation of Medici is complete. Click **Finish** to complete the installation and proceed to post-install configuration.

Post-Install Configuration

After installing this latest Medici release, you will need to perform some tasks before using the Medici application.

Update DMTransaction Folder for Upgrades

If you are installing multiple clients, you only need to perform the steps in this section once after the first client install. Do not repeat the steps for every client. The purpose of these steps is to make certain the updated custom files get automatically copied over to any new client workstations that may be added to your Medici environment at a later date.

1. Create a new folder called 1.0 in the DMTransaction\Documenter Update Folder\ location.
2. Place the following files from an upgraded client into the 1.0 folder :
 - From the MediciClient folder:
 - CustomNPI.xml
 - Macros.ini
 - RMDisplayVars.xml
 - PDFSettings.xml
 - From the MediciClient\Database folder:
 - Mbnk.mdb
 - From the MediciClient\Word Automation folder:
 - Amort.xls
 - Bank_FindReplace.mdb
 - Bank_Specific.dot
 - BankUseOnlyText.rtf
 - Logo001.bmp and any other logo files
 - Uformat.ini

Note

You will need to use files from an upgraded client and not the files created during the pre-install process for Disaster Recovery. Some of the files may be modified during the upgrade process.

Exclude the Medici Client Directory and DMTransaction from Anti-Virus Scanning

Anti-virus software that performs real-time file scanning while running on a machine that hosts the Medici Client negatively impacts the performance of Medici. Therefore, exclude the Medici Client directory, and all child directories, from any real-time anti-virus file scanning. Additionally, the remote DMTransaction path also needs to be excluded from A-V scanning on each machine running the Medici client.

Permissions to the Medici Client Directory and DMTransaction

Medici users need to have full control permissions to the Medici Client directory, and all child directories. Additionally, Medici users need to have full control permissions to the DMTransaction directory and all child directories.

Configure Component Services

COM+ configuration differs depending on the current version of your operating system. Follow the additional configuration steps in [Appendix D](#) to configure COM+ for Windows Server 2003, SP 1 and above as well as Windows Server 2008. Complete only the section that applies to your environment.

Appendix D demonstrates how to configure user rights for the COM+ components following an installation of the Medici Server.

Note

You should only configure COM+ if the Medici Server exists on a separate machine from the Medici Client.

Un-install Medici 2018.2, 2018.1.1, and 2017.1.4

This section describes how to remove (un-install) the Medici application. The un-install behavior described in this section is only applicable to Medici 2018.2, 2018.1.1, and 2017.1.4.

This un-install feature uses the Add/Remove Program option available in the Control Panel of the Windows operating system. If you are familiar with removing other applications in Windows, you will find that removing the Medici application involves similar steps.

Some files and folders remain behind when uninstalling Medici features:

- Uninstalling the Medici Server:
 - The backup folders and all the contents of the backup folders are retained. These are the folders and files you saved to the **Custom Files** folder in the pre-install section of this guide.
 - NumToText.xml — If you have edited this file, an upgrade or un-installation does not change or remove this file. You can find the file in the root directory of the Medici Server, for example, C:\Medici\MediciServer.
 - License file — This file, DMLic.lic, is not overwritten or removed by an upgrade or un-installation. You can find the file in the MediciServer folder.
 - Encryption Keys folder — This folder and its contents are not overwritten or removed by an upgrade or un-installation.
 - Server.ini — This file is not removed.
- Removing the Medici Database:
 - Existing Medici databases are never removed or overwritten.
 - If you choose to remove a Medici database feature, the only files removed are the database upgrade utility files.
 - SQL backup files are your property, and are not removed by the un-installation process.
 - A log file is created during the installation/un-installation process. The log file is not removed during un-installation. If errors occur as you remove Medici, you might find useful information in the log file. The SQL log is found in Log Path relative to the SQL Server.
- Removing the Medici Client:
 - The DMTransaction folder is never removed or overwritten.
 - The Client files that are not overwritten or removed by the install:
 - mBnk.mdb
 - Bank_FindReplace.mdb
 - BankSpecific.dot
 - Logo001.bmp or other logo files
 - macros.ini
 - uformat.ini
 - Barcoding info.xml
 - Amort.xls
 - lw.ini
 - BankUseOnlyText.rtf
 - RMDisplayVars.xml

The un-install process will create a backup of important Medici files. These files are saved in <Medici Install folder>\Install_Backup\<Version Number>\<Date>\<Time>\.

Example: C:\Medici\Install_Backup\10_2_0_1271\4_9_2011\23_35_41\

The un-installation of any Medici feature does not uninstall any files that were not installed as a part of the Medici feature. So, if you uninstall a Medici feature, any file remains as is, so long as the file was added after the Medici feature was installed.

[Un-Installing Medici 2018.2, 2018.1.1, and 2017.1.4](#)

To remove Medici:

1. From the Windows Start button, select **Control Panel, Add or Remove Programs**.
2. From the Currently Installed Programs list, click the Medici application.
3. Click **Change/Remove**.

Appendix A: Component Services Configuration for Windows Server 2003/2008

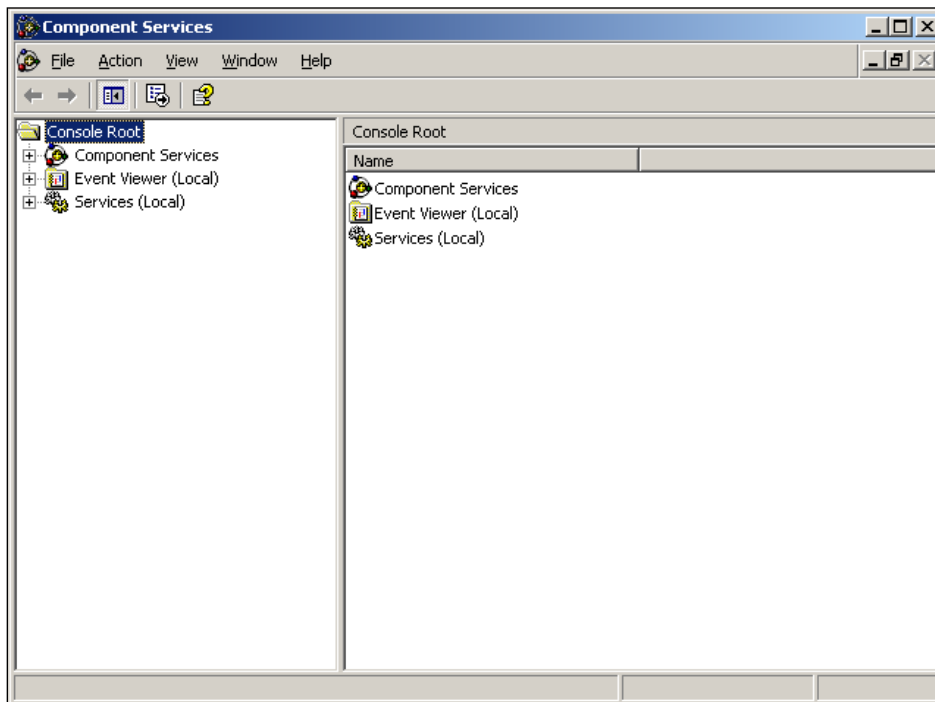
COM+ configuration differs depending on the current version of your operating system. Follow the additional configuration steps in [Appendix D](#) to configure COM+ for Windows Server 2003 with SP 1 and above as well as Windows Server 2008. Complete only the section that applies to your environment.

These instructions demonstrate how to configure user rights for the COM+ components following an installation of the Medici Server.

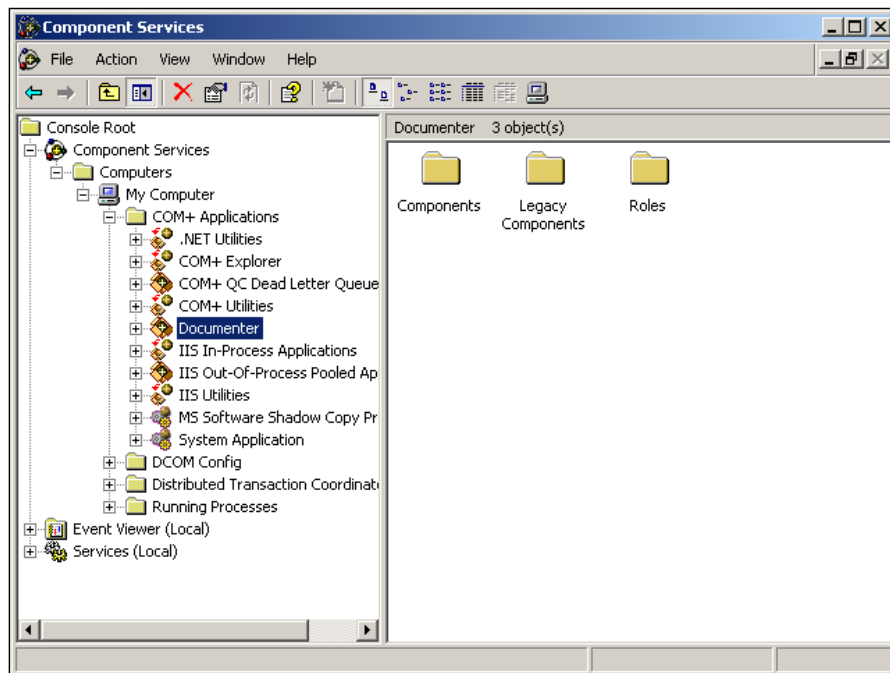
Note

You should only configure COM+ if the Medici Server exists on a separate machine from the Medici Client.

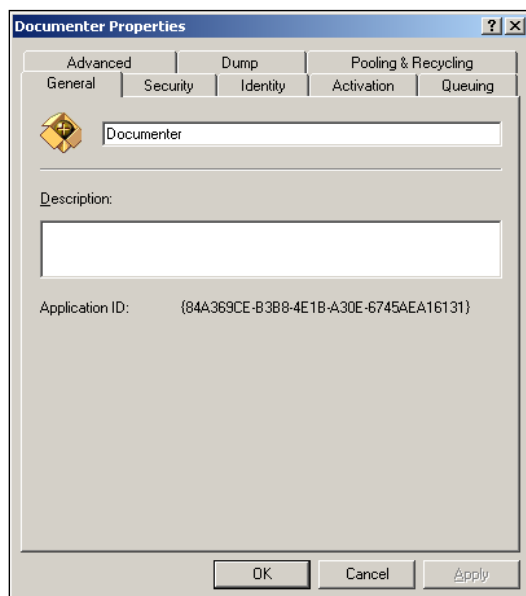
1. To open Component Services, from your desktop click **Start**, click **Control Panel**, double-click **Administrative Tools**, and then double-click **Component Services**. The **Component Services** window appears.



1. To locate the Medici COM+ Application, expand the **Component Services** node, expand the **Computers** node, expand the **My Computer** node, and then expand the **COM+ Applications** node. Click **Documenter**.



2. Right-click the **Documenter** Medici COM+ object and select **Properties**. The **Documenter Properties** window appears.

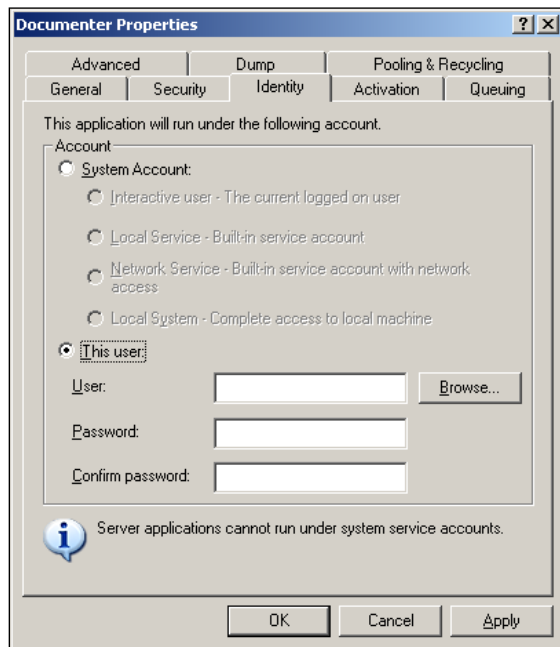


Note

If there is no Medici COM+ item on the Medici Server machine, follow the instructions in [Create a Missing COM+ Object](#).

3. Click the **Identity** tab and select **This User**. Enter a user in the **User** field.

To make your setup work easier, you can also click **Browse** to select a user who has sufficient rights and permissions to be a Local Domain Administrator. This administrator is able to log into the application server, to run the Application Component, and to access any files or folders used by Medici, but is restricted to operating only on the local machine.

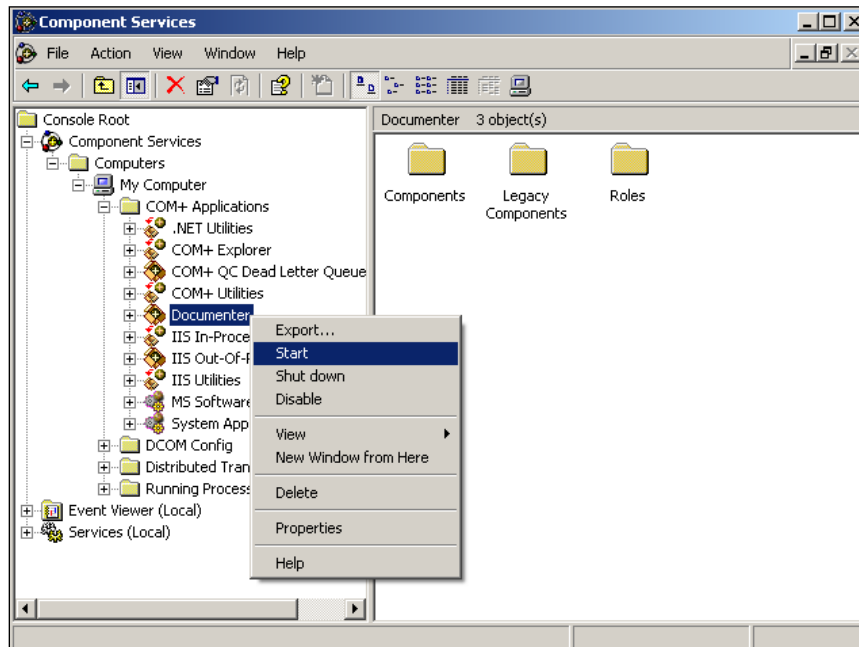


Important

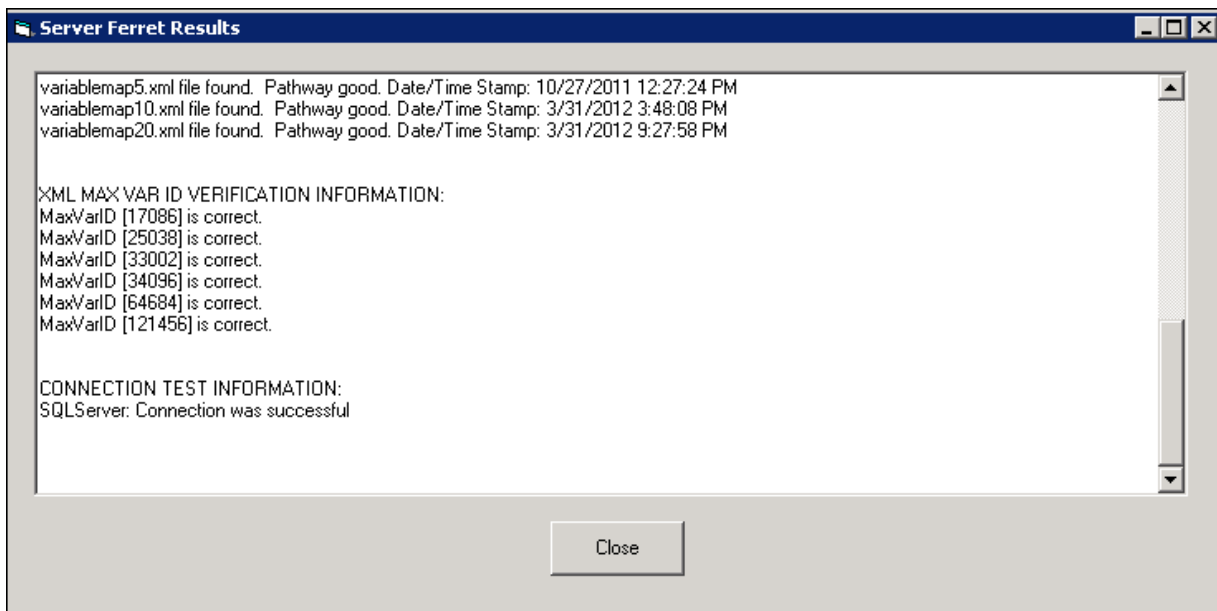
If the Medici database is using Windows Authentication, the user in this tab should also be set up with permissions to access that database. If no current user meets the defined requirements, or if there is a need to prevent users from having administrative access, you must create a new user with the appropriate rights.

4. Click **Apply** and **OK** to close the **Documenter Properties** window.

5. Right-click the **Documenter** item and select **Start**. This starts the COM+ Service for Medici.



6. After you configure the COM+ application, go into the MediciServer folder and run the "Server Ferret.exe". This utility will help test the COM+ application locally. When the Server Ferret results are displayed, pay particular attention to the "Connection Test Information". If the connection test was successful, the COM+ application is working properly. Anything other than a successful test result indicates there is a problem with the configurations.



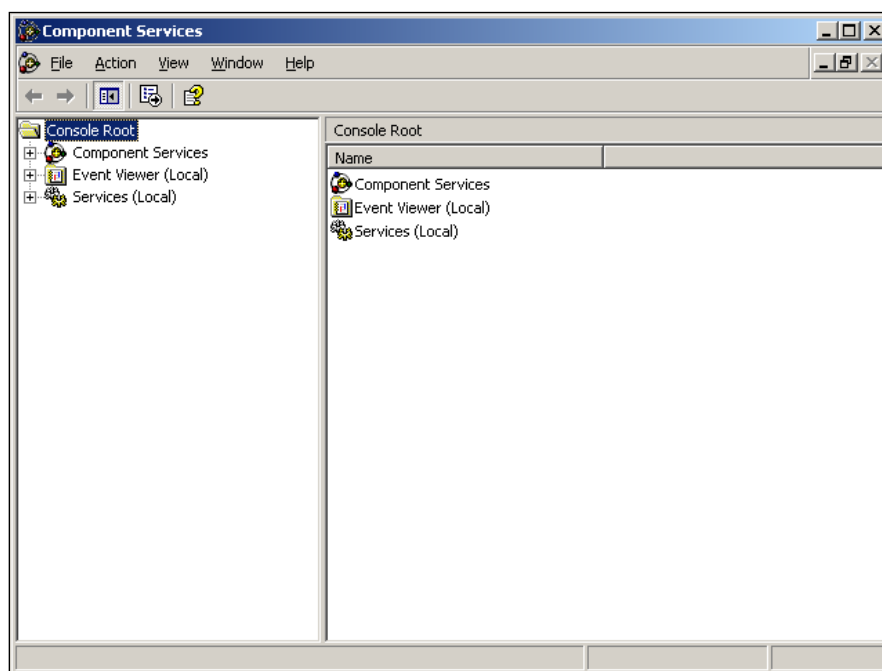
Create a Missing COM+ Object

Create the COM+ object only on the machine where you installed the Medici Server, and only if the Medici Client does not exist on the same machine. Medici users will have difficulty with communications if the COM+ object for Medici does not exist on the machine where you installed the Medici Server. These instructions demonstrate how to create a missing Medici COM+ object.

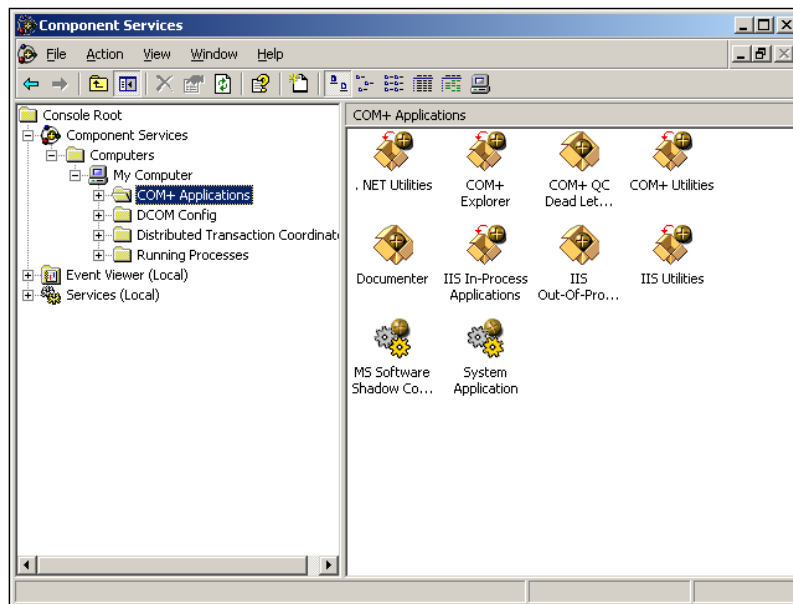
Note

The Medici Server installations that include the Medici Client should not contain a COM+ Component.

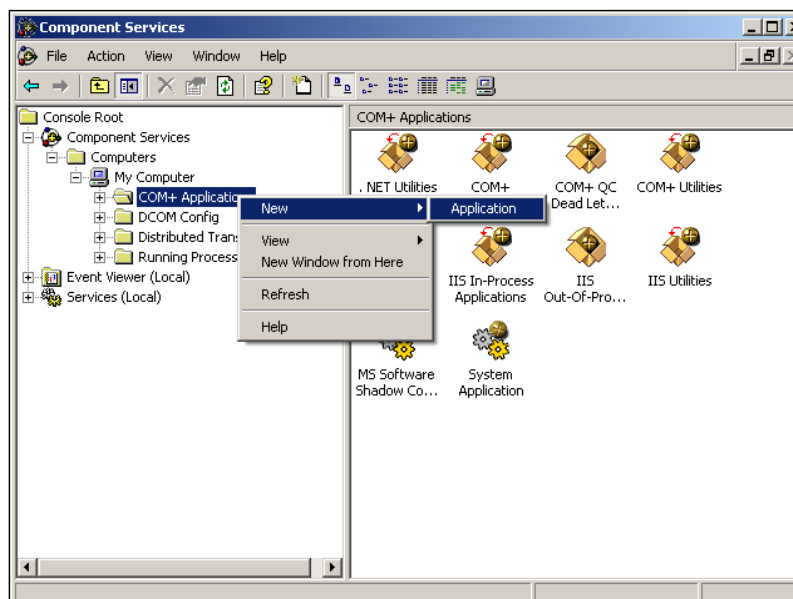
1. To open Component Services, click **Start**, click **Control Panel**, click **Administrative Tools**, and then double-click on **Component Services**. The **Component Services** window appears.



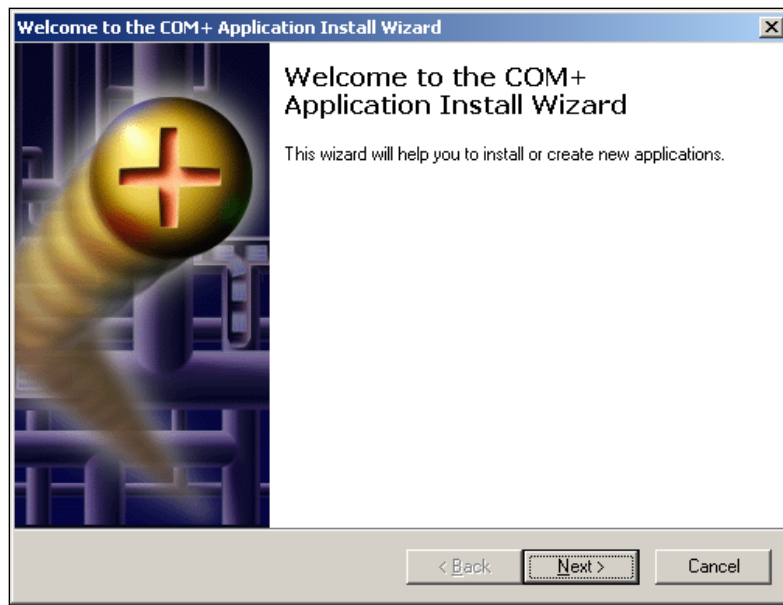
7. To open COM+ applications, expand the **Component Services** node, expand the **Computers** node, expand **My Computer**, and then expand **COM+ Applications**.



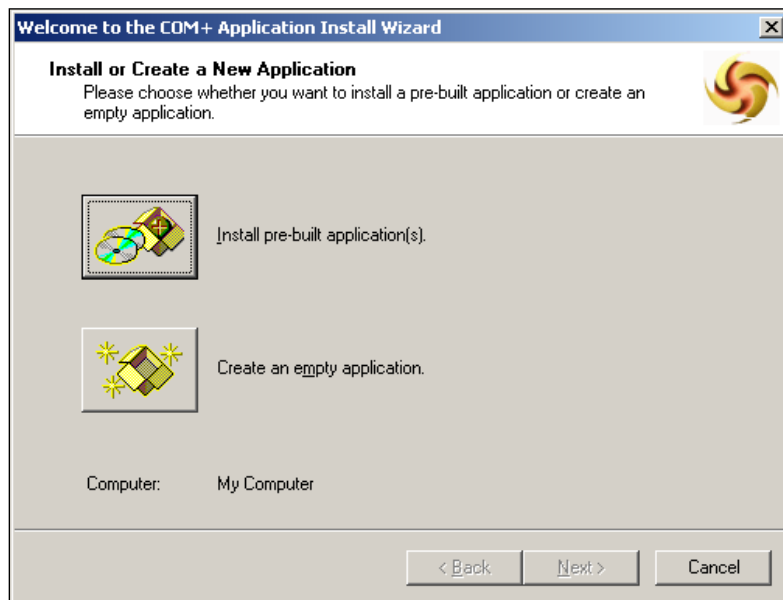
8. To create a new application folder, right-click **COM+ Applications** and select **New** then **Application** from the context menu.



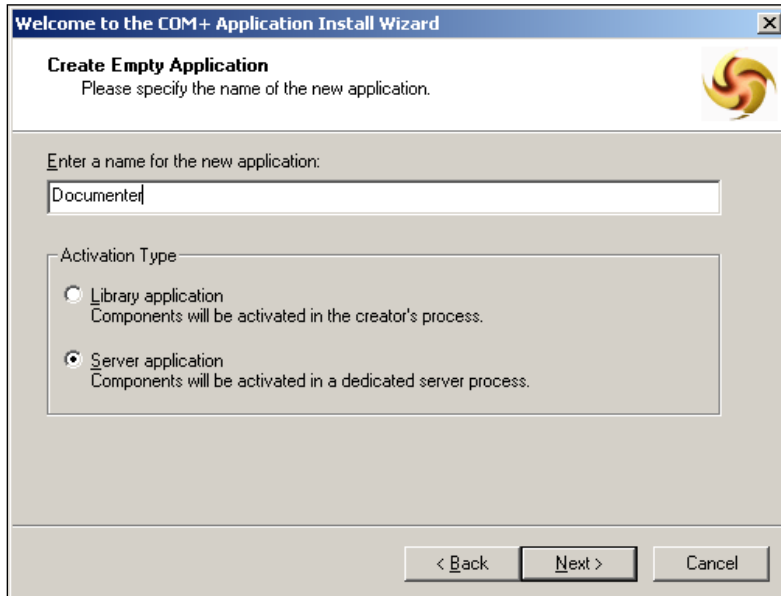
9. The Welcome to the COM Application Install Wizard window appears. Click **Next**.



10. Click Create an empty application.



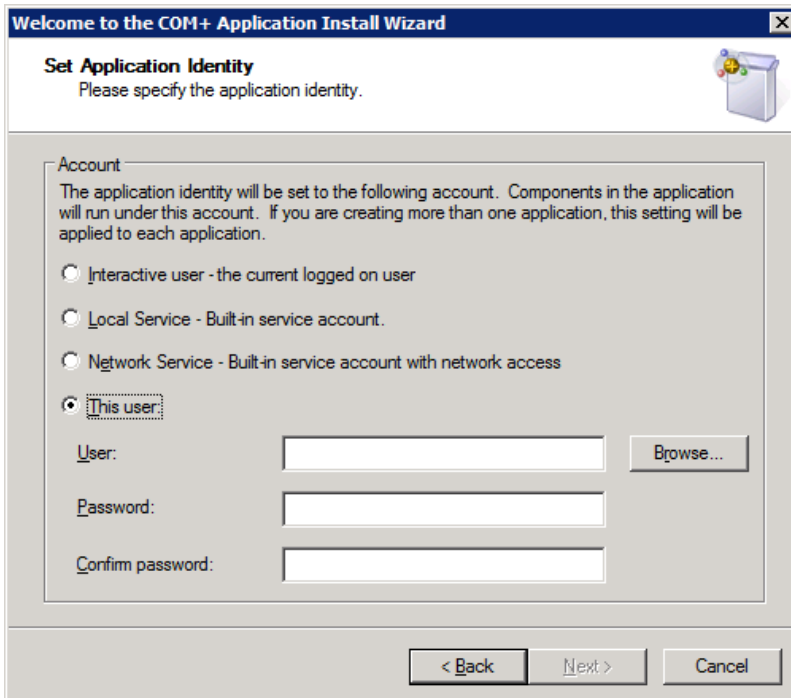
11. Type **Documenter** for the new application name. Select the **Server application** option and click **Next**.



The screenshot shows the 'Welcome to the COM+ Application Install Wizard' window. The title bar reads 'Welcome to the COM+ Application Install Wizard'. The main heading is 'Create Empty Application' with the instruction 'Please specify the name of the new application.' Below this is a text box labeled 'Enter a name for the new application:' containing the text 'Documenter'. Underneath is the 'Activation Type' section with two radio buttons: 'Library application' (unselected) and 'Server application' (selected). The 'Server application' option has a subtext: 'Components will be activated in a dedicated server process.' At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

12. In the Set Application Identity window, select **This User**.

To make your setup work easier, you can also click **Browse** to select a user who has sufficient rights and permissions to be a Local Domain Administrator. This administrator is able to log into the application server, to run the Application Component, and to access any files or folders used by Medici, but is restricted to operating only on the local machine.

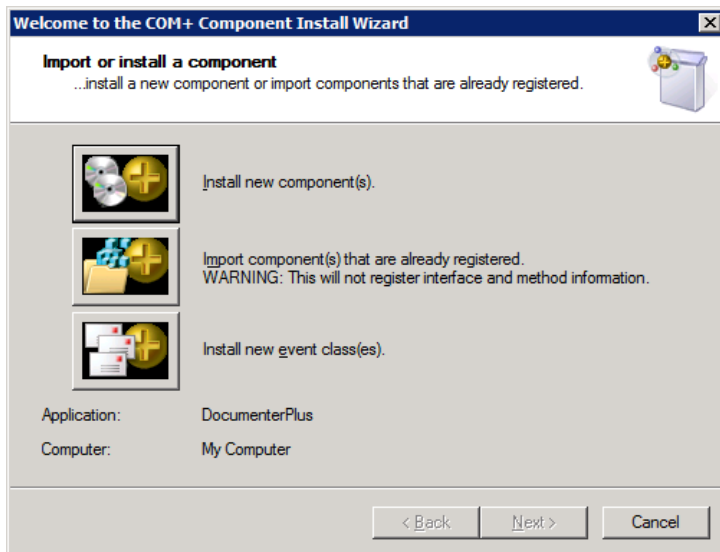


The screenshot shows the 'Welcome to the COM+ Application Install Wizard' window. The title bar reads 'Welcome to the COM+ Application Install Wizard'. The main heading is 'Set Application Identity' with the instruction 'Please specify the application identity.' Below this is the 'Account' section with the text: 'The application identity will be set to the following account. Components in the application will run under this account. If you are creating more than one application, this setting will be applied to each application.' There are three radio buttons: 'Interactive user - the current logged on user' (unselected), 'Local Service - Built-in service account.' (unselected), and 'Network Service - Built-in service account with network access' (unselected). The 'This user:' option is selected, and it has a subtext: 'The application identity will be set to the following account. Components in the application will run under this account. If you are creating more than one application, this setting will be applied to each application.' Below this are three text boxes: 'User:', 'Password:', and 'Confirm password:'. To the right of the 'User:' box is a 'Browse...' button. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

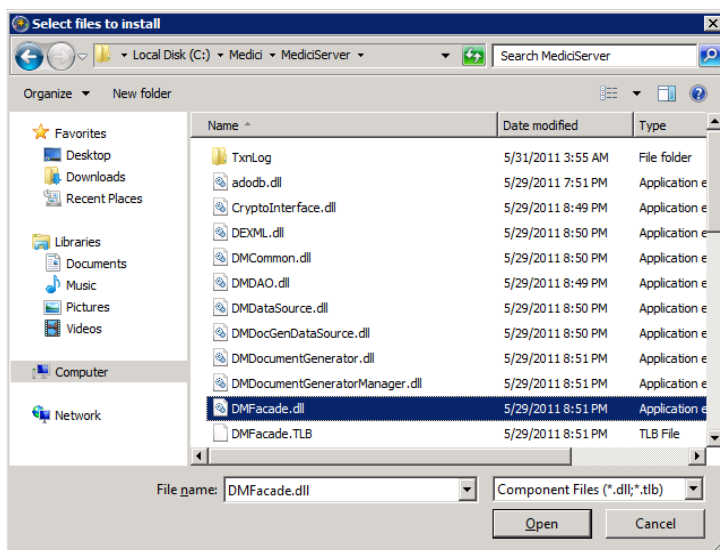
Important

If there is any problem with the administrator, select another user that has full access to both the folders that Medici uses and to the SQL Server. Access to the SQL Server is only necessary when using Windows Authentication, however. If no current user meets the defined requirements, or if there is a need to prevent users from having administrative access, you must create a new user with the appropriate rights.

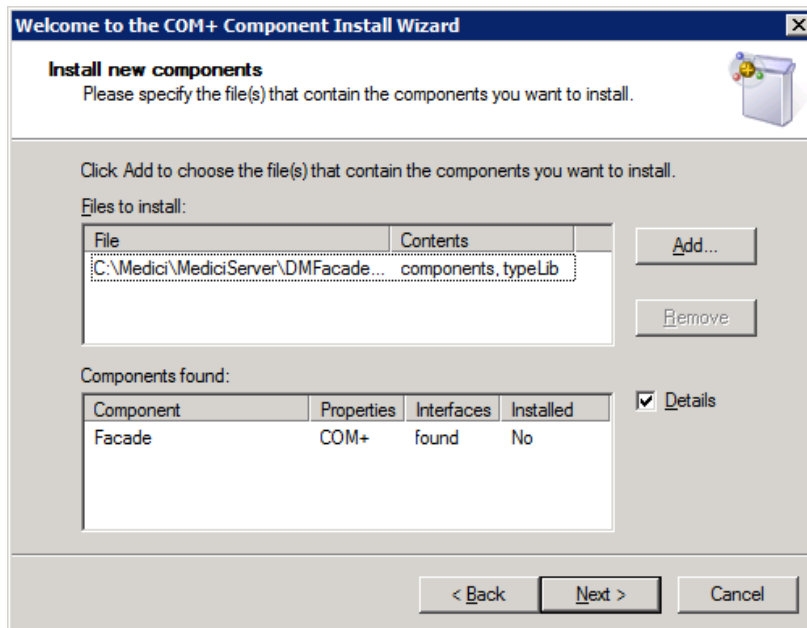
13. After you create or select a user, click **Next**.
14. If you are on Windows Server 2008, you will be asked to **Add Application Roles** and **Add Users** to the roles. Accept the default role, CreatorOwner, click **Next**, and accept the current user. Click **Next** and **Finish**.
15. If you are not working from Windows Server 2008, please skip to Step 14. For Windows Server 2008 users, right-click **Documenter** and choose **New, Component**. Click **Next** from the **COM+ Component Install Wizard** Welcome screen.



16. Choose **Import component(s) that are already registered** and browse to the location of **DMFacade.dll** in the MediciServer folder.

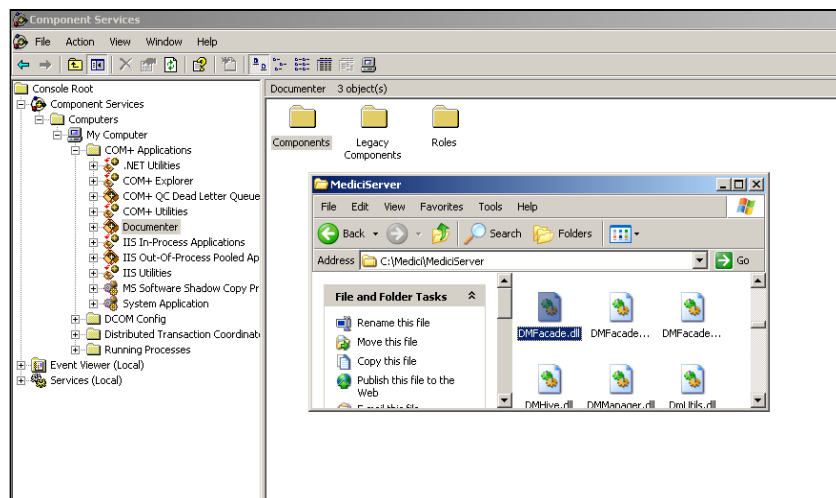


17. Click **Open**. **DMFacade.dll** has been added to the **Files to Install** list.

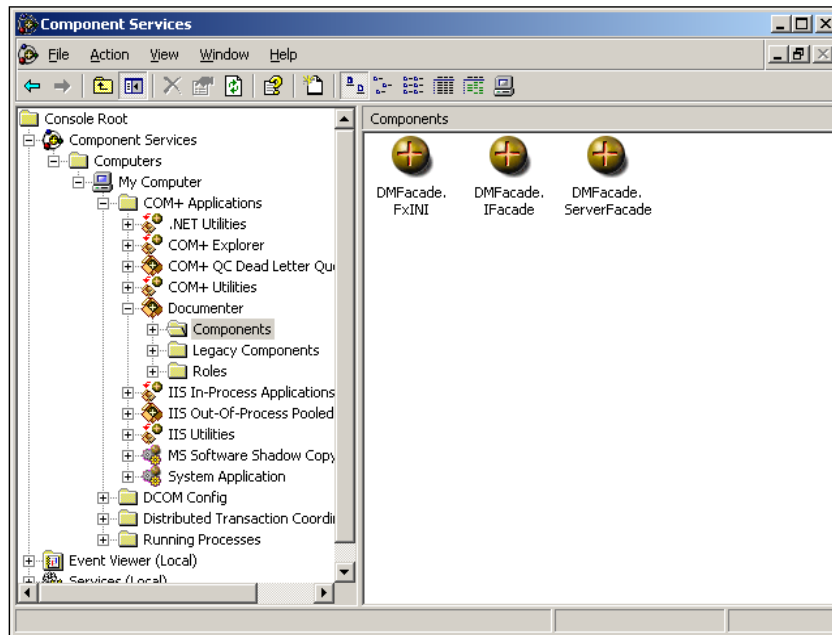


18. Click **Next** and **Finish** and **DMFacade.dll** will be installed as a component. Skip to Step 15.

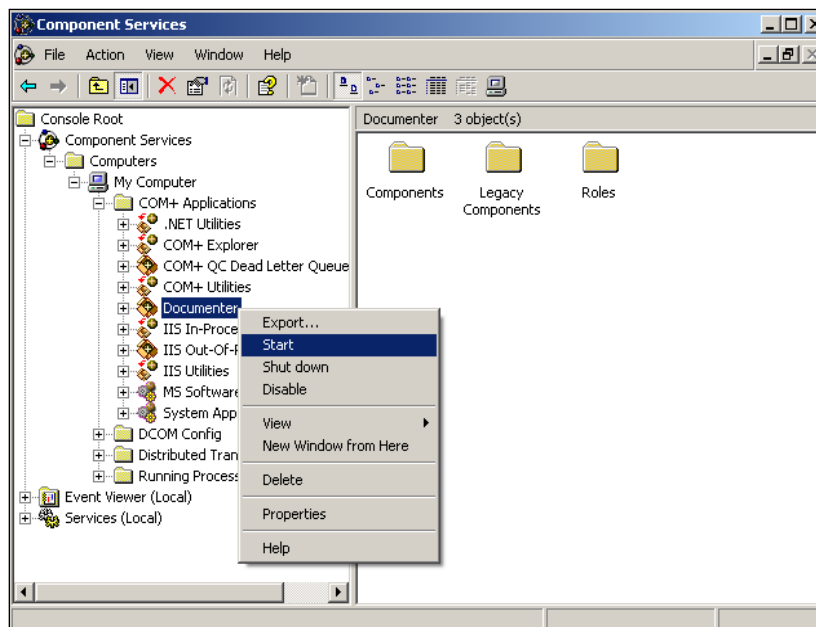
19. Drag and drop the **DMFacade.dll** file from the Medici Server Directory location to the **Components** folder under the new Medici application, for example: **C:\Medici\MediciServer**.



20. Verify the component folder appears as follows:



21. Right-click the Medici COM+ object, **Documenter**, and select **Start** to start the service.

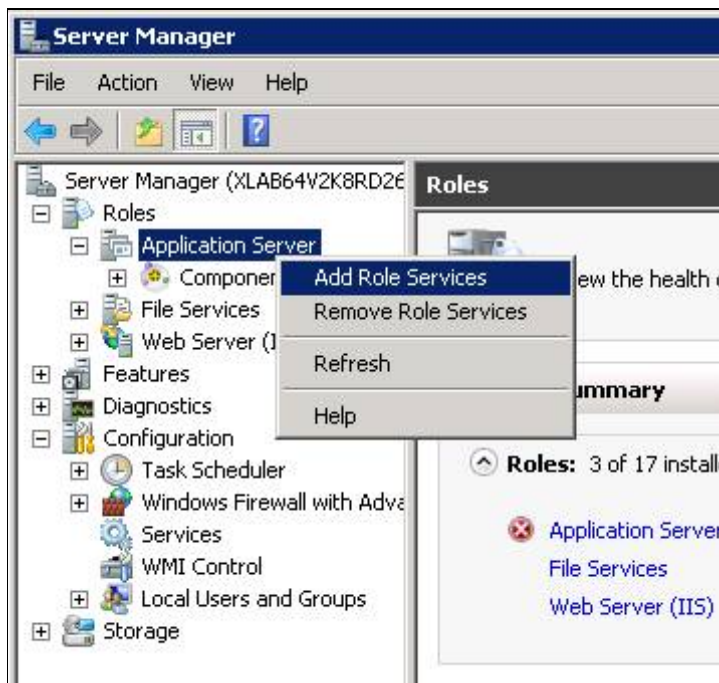


COM+ Disabled in Windows Server 2008

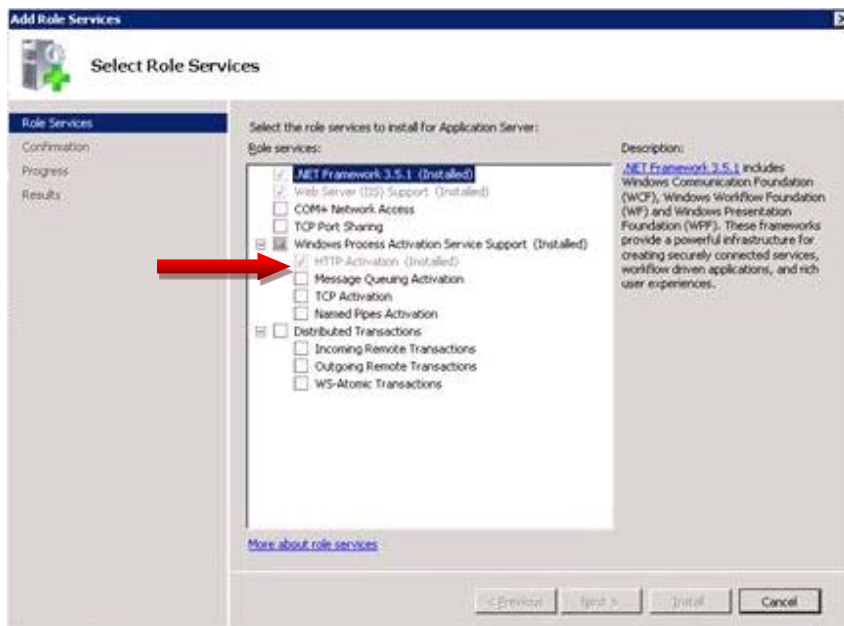
The Medici Server requires an enabled COM+. For both new and upgrade users, COM+ may be disabled by default in Windows Server 2008 as shown by an error in the Event Viewer when attempting to start the component:



1. To enable COM+, open Server Manager, right-click **Application Server** and select **Add Role Services**.



22. Select **COM+ Network Access** and click **Install**.



Appendix B: Component Services Configuration for Windows Server 2012

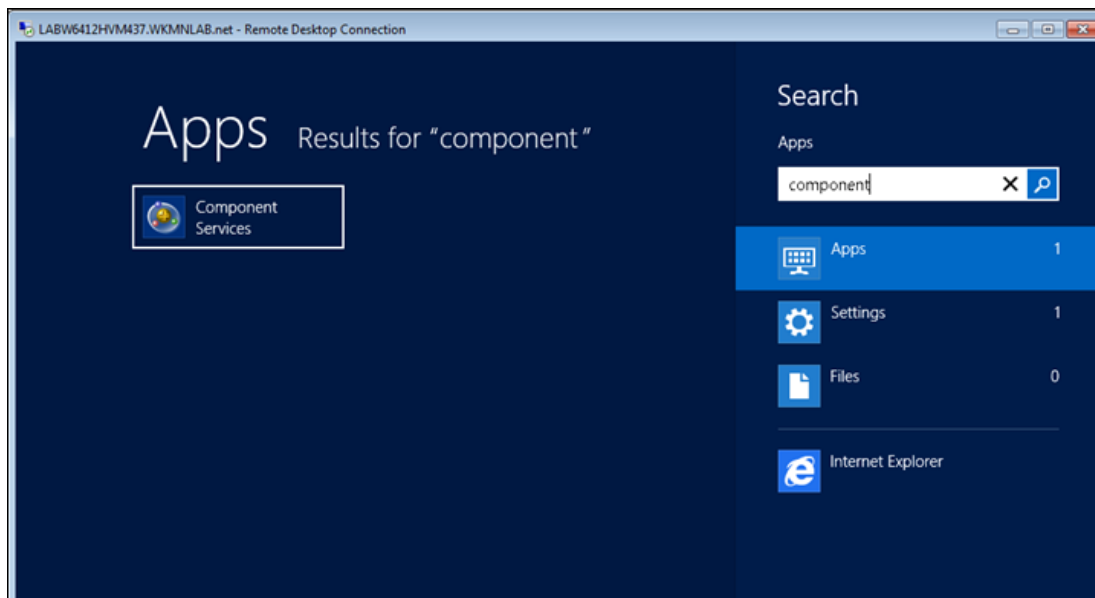
COM+ configuration differs depending on the current version of your operating system. Complete only the section that applies to your environment.

These instructions demonstrate how to configure user rights for the COM+ components following an installation of the Medici Server.

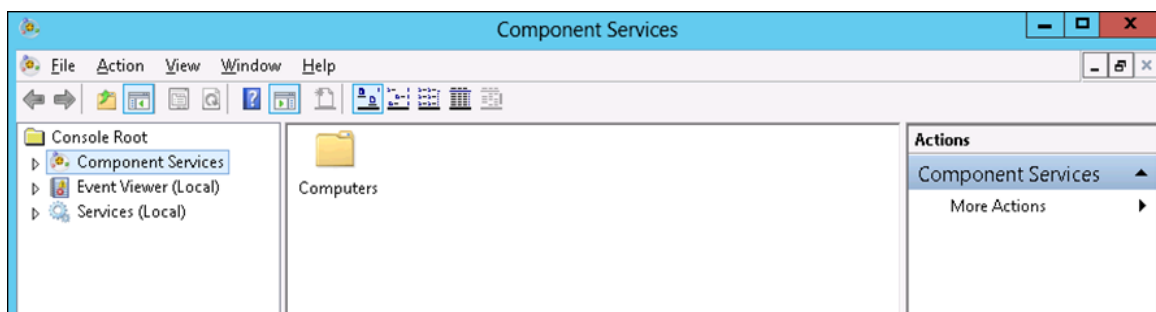
Note

You should only configure COM+ if the Medici Server exists on a separate machine from the Medici Client.

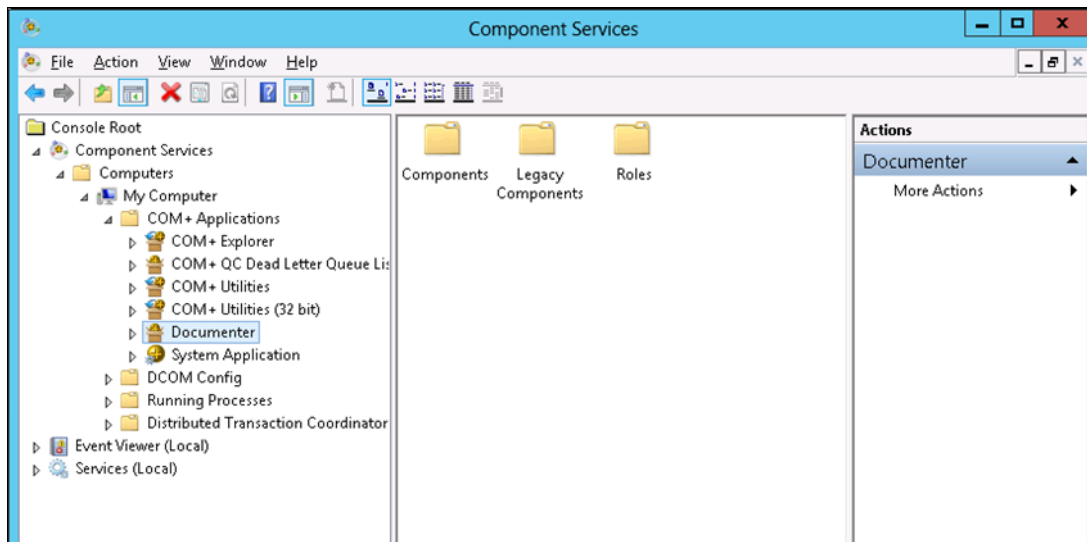
1. Search for Component Services in the Start menu.



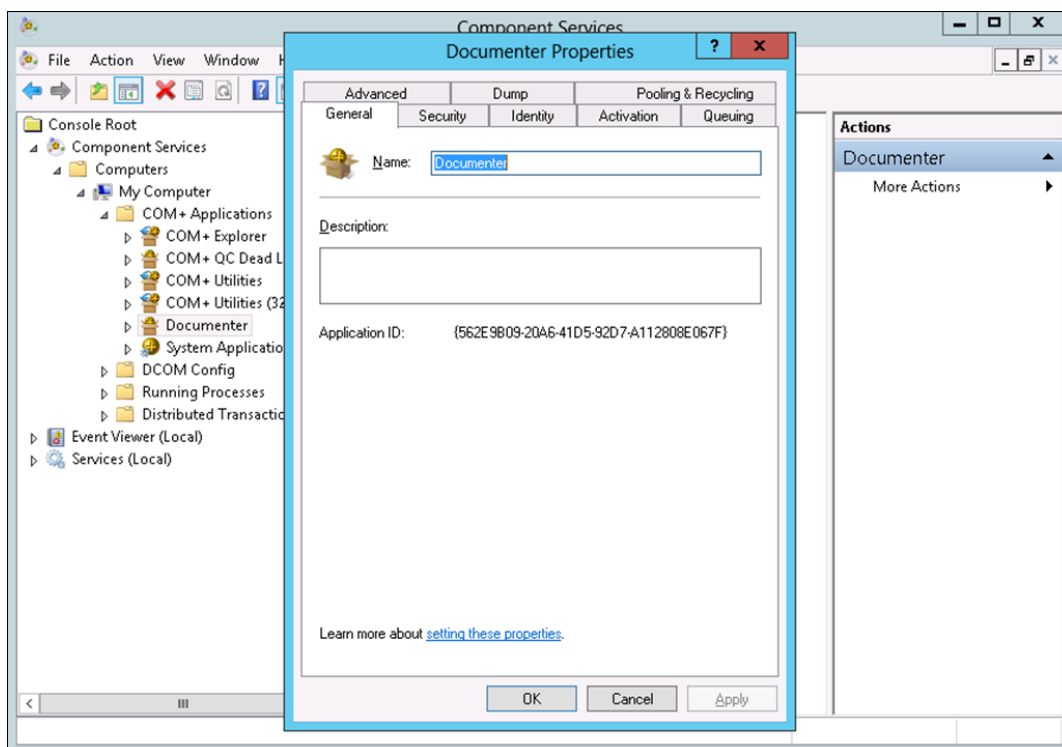
23. Select **Component Services**. The Component Services window appears.



24. To locate the Medici COM+ Application, expand the **Component Services** node, the **Computers** node, the **My Computer** node, and the **COM+ Applications** node. Select **Documenter**.



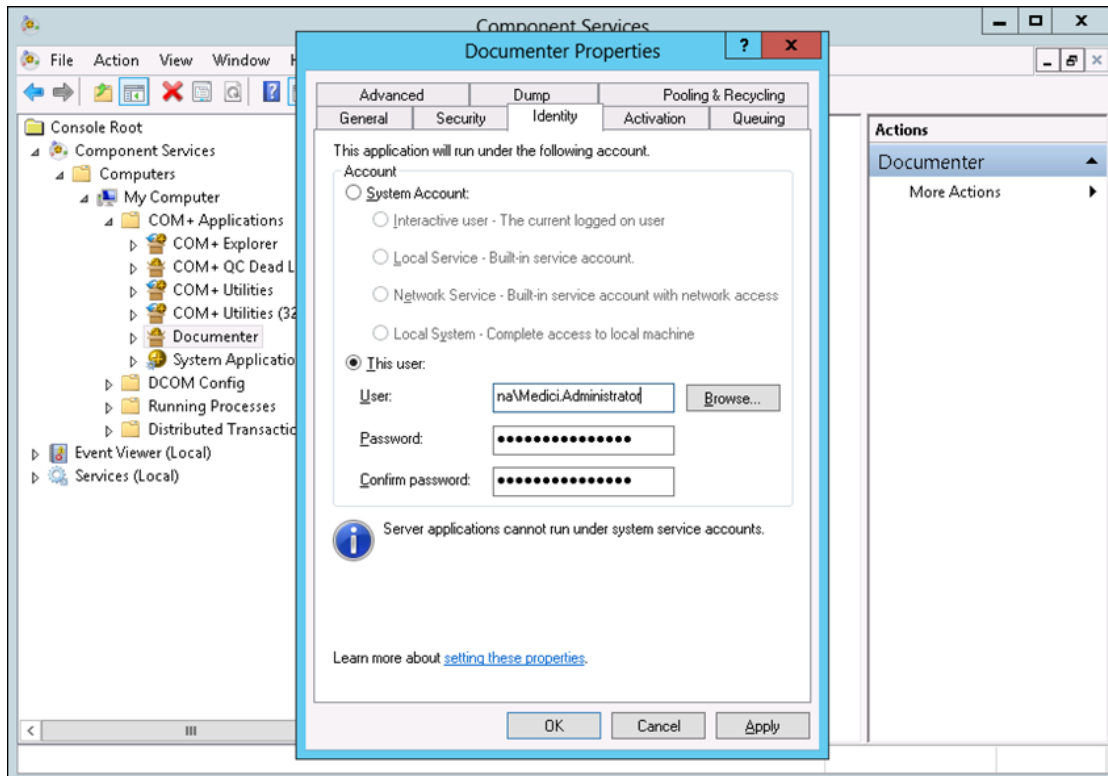
25. Right-click the **Documenter** Medici COM+ object and select **Properties**. The **Documenter Properties** window appears.



Note

If there is no Medici COM+ item on the Medici Server machine, follow the instructions in [Create a Missing COM+ Object](#).

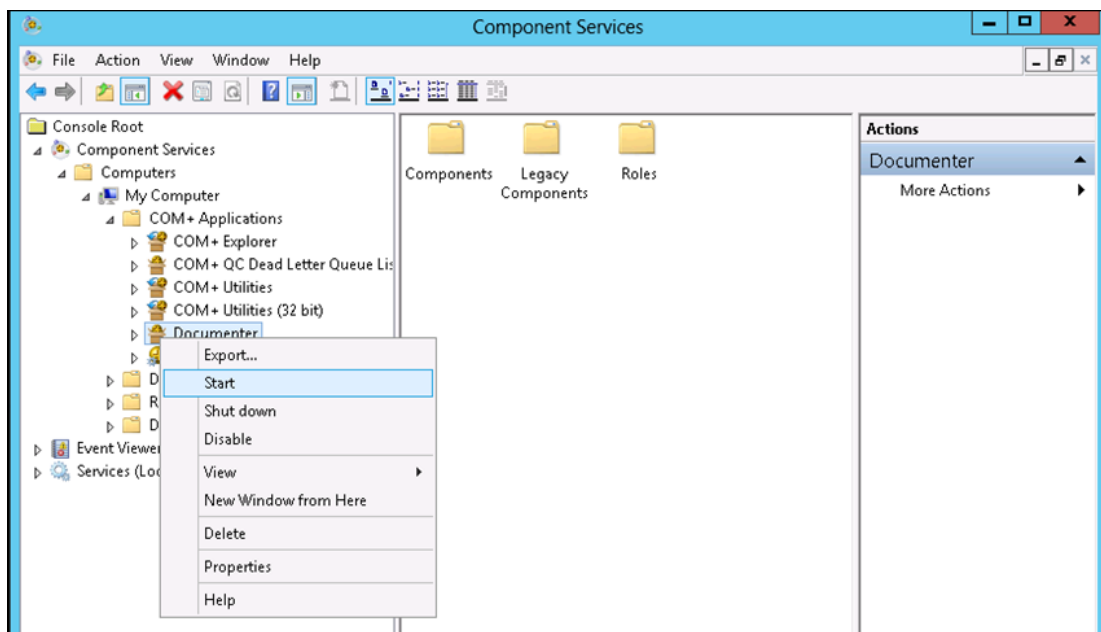
26. Select the **Identity** tab and select **This User**. Enter a user in the **User** field.
- To make your setup work easier, you can also click **Browse** to select a user who has sufficient rights and permissions to be a Local Domain Administrator. This administrator can log into the application server, run the Application Component, and access any files or folders used by Medici, but is restricted to operating only on the local machine.
27. Click the **Apply** and **OK** buttons to close the **Documenter Properties** window.



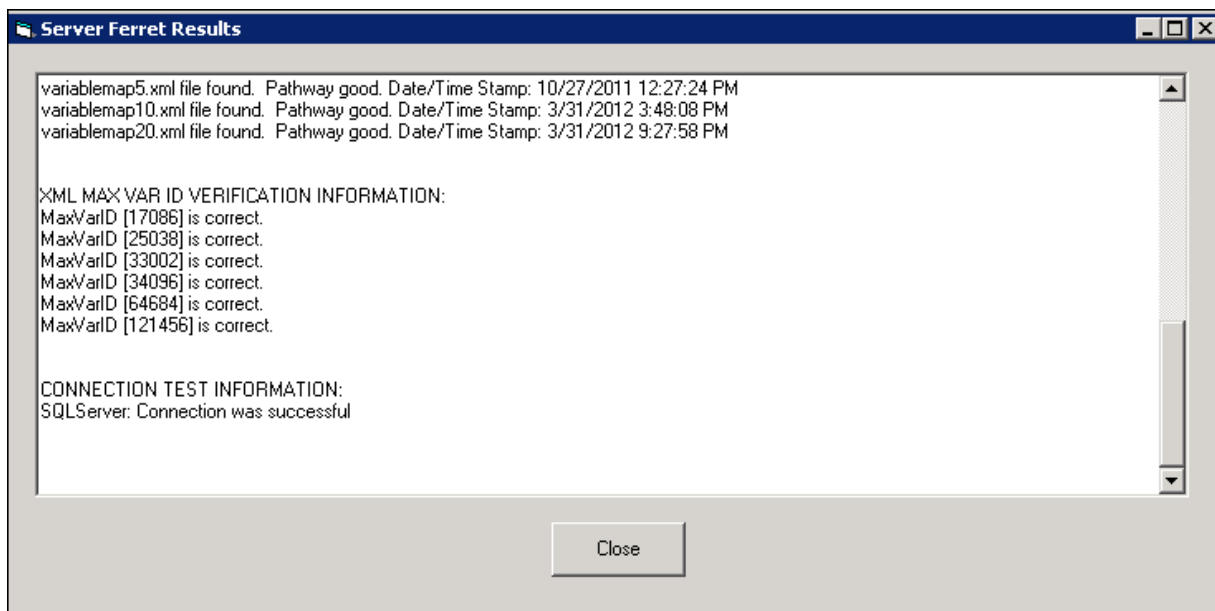
Important

If the Medici database is using Windows Authentication, the user in this tab should also be set up with permissions to access that database. If no current user meets the defined requirements, or if there is a need to prevent users from having administrative access, you must create a new user with the appropriate rights.

28. Right-click the **Documenter** item and select **Start**. This starts the COM+ Service for Medici.



29. After you configure the COM+ application, go into the MediciServer folder and run the “Server Ferret.exe,” This utility will help test the COM+ application locally. When the Server Ferret results are displayed, pay particular attention to the “Connection Test Information.” If the connection test was successful, the COM+ application is working properly. Anything other than a successful test result indicates there is a problem with the configurations.



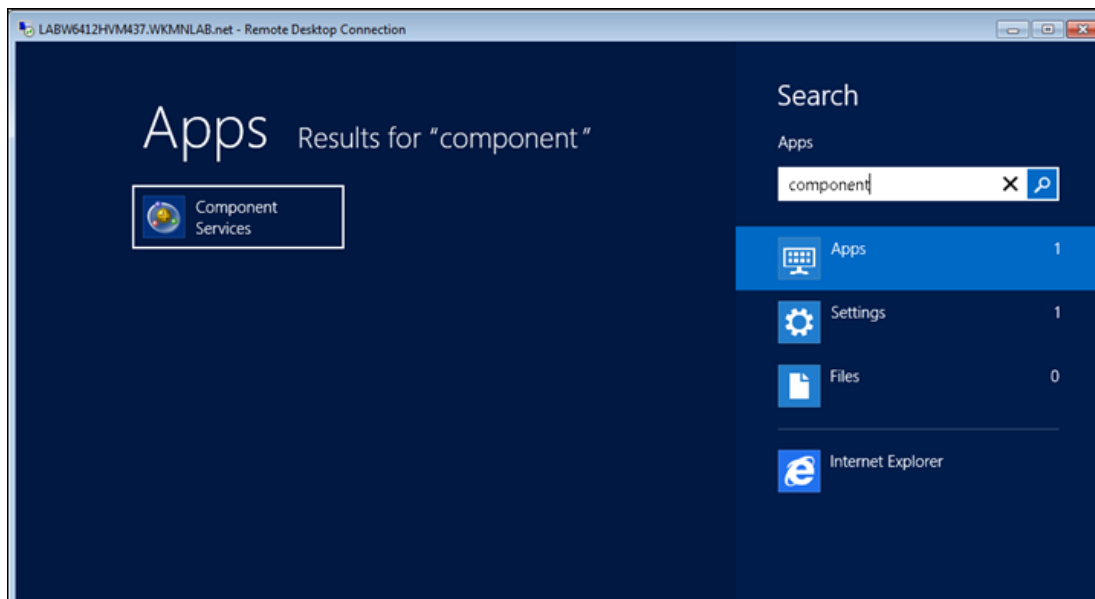
Create a Missing COM+ Object

Create the COM+ object only on the machine where you installed the Medici Server, and only if the Medici Client does not exist on the same machine. Medici users will have difficulty with communications if the COM+ object for Medici does not exist on the machine where you installed the Medici Server. These instructions demonstrate how to create a missing Medici COM+ object.

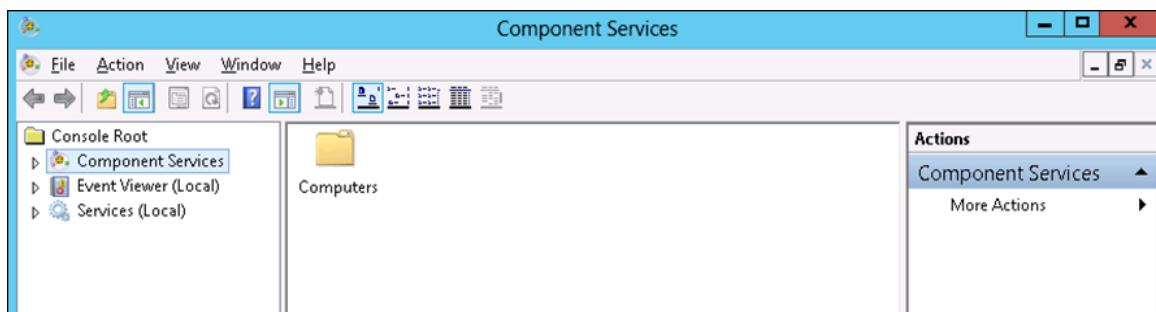
Note

The Medici Server installations that include the Medici Client should not contain a COM+ Component.

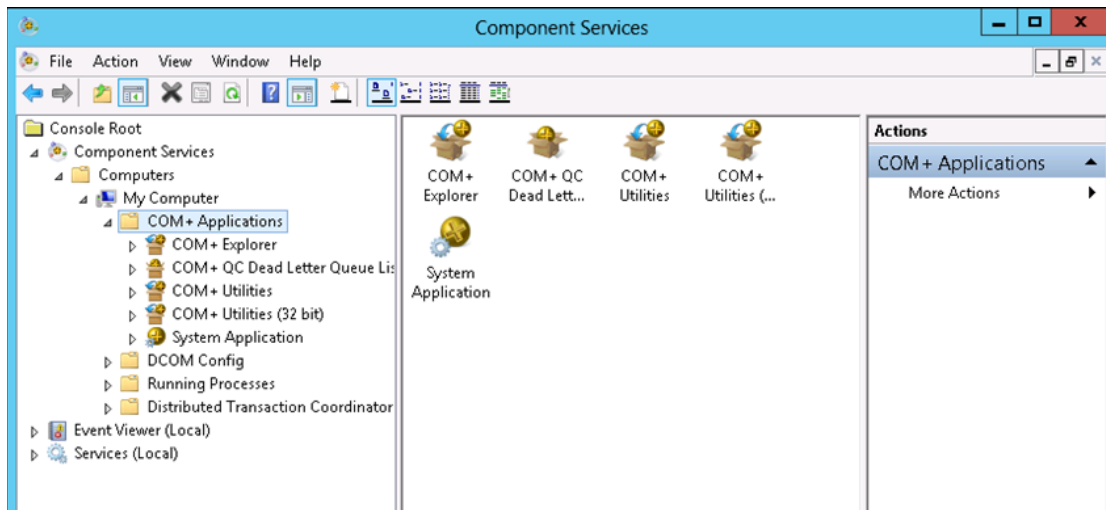
1. Search for Component Services in the Start menu.



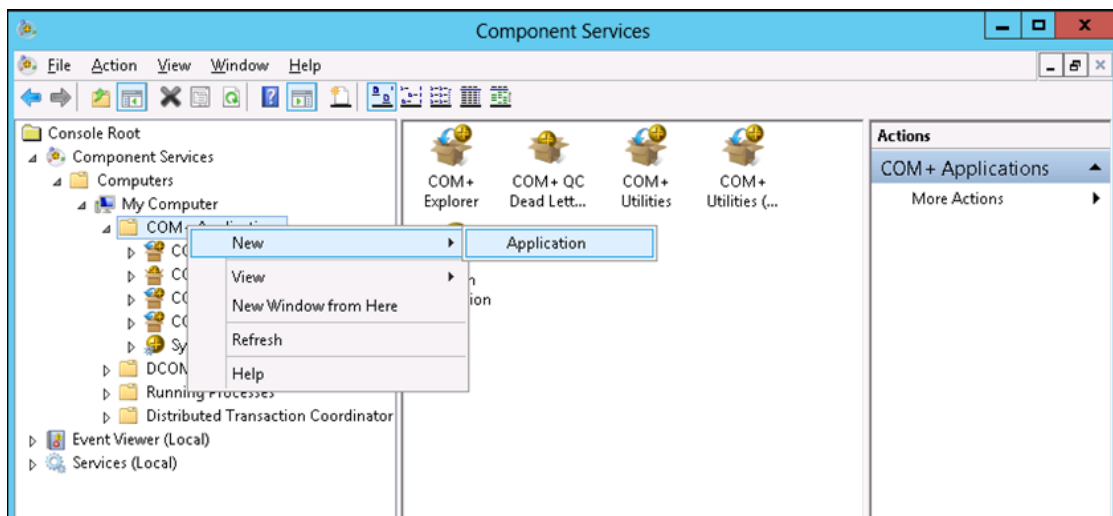
30. Select **Component Services**. The Component Services window appears.



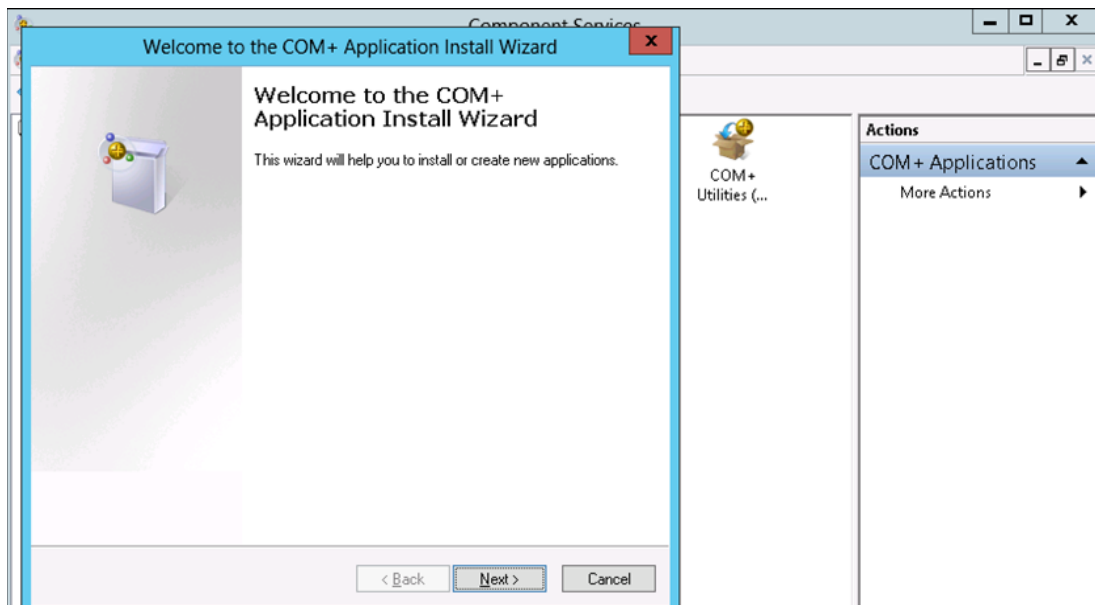
31. To open COM+ applications, expand the **Component Services**, **Computers**, **My Computer**, and **COM+ Applications** nodes.



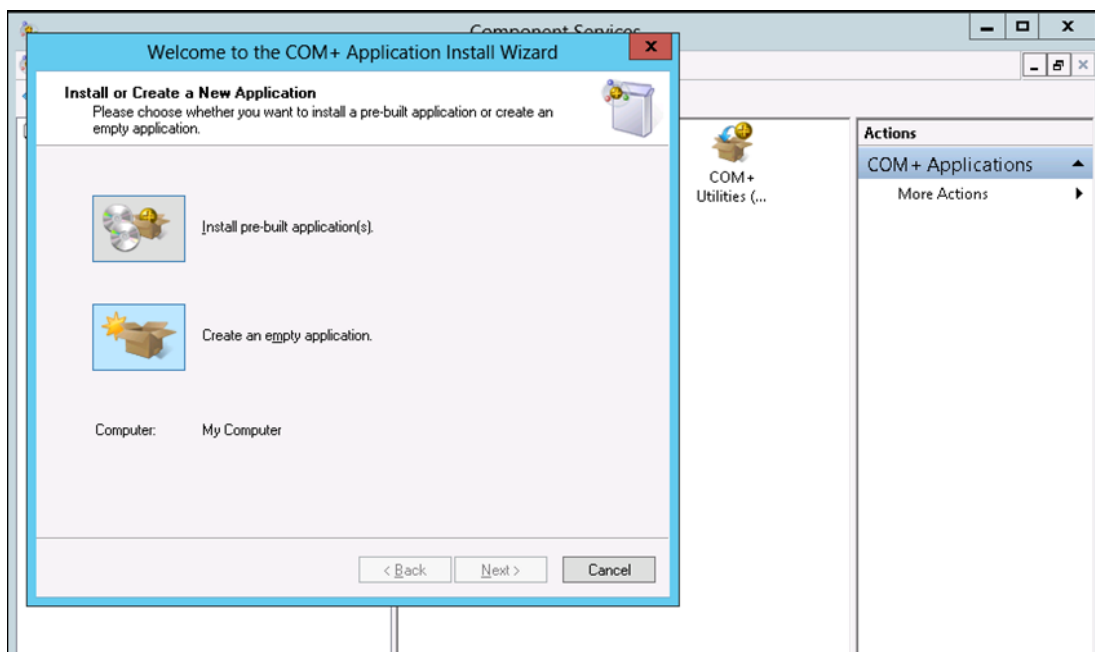
32. To create a new application folder, right-click on **COM+ Applications** and select **New** and **Application**.



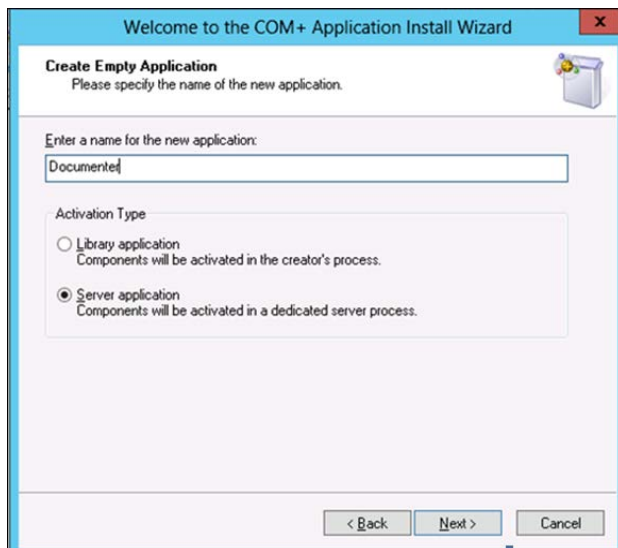
33. The Welcome to the COM+ Application Install Wizard window appears. Click **Next**.



34. Select **Create an empty application**.



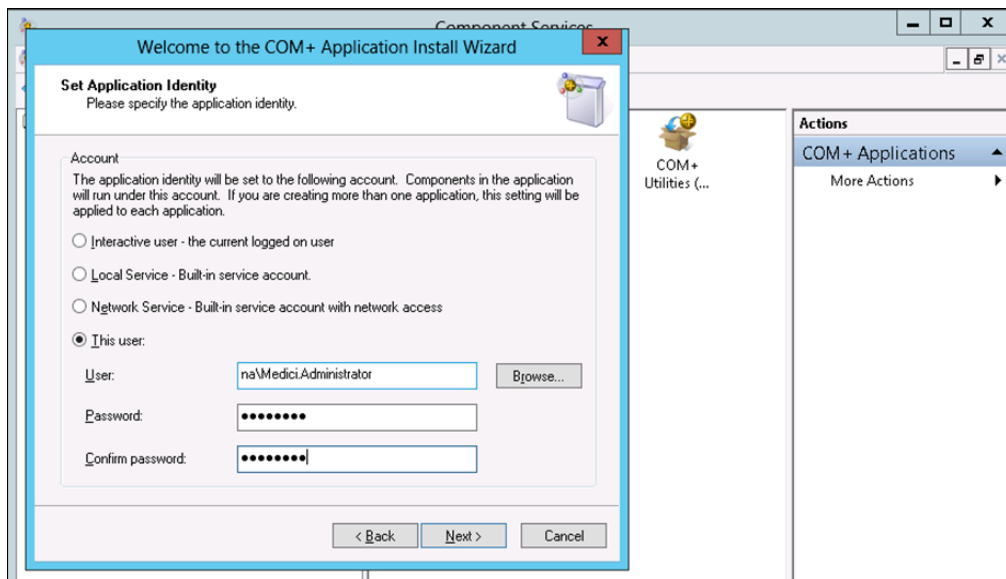
35. Enter **Documenter** as the new application name. Select the **Server application** option and click **Next**.



36. In the Set Application Identity window, select **This User**.

- To make your setup work easier, you can also click **Browse** to select a user who has sufficient rights and permissions to be a Local Domain Administrator. This administrator is able to log into the application server, run the Application Component, and access any files or folders used by Medici, but is restricted to operating only on the local machine.

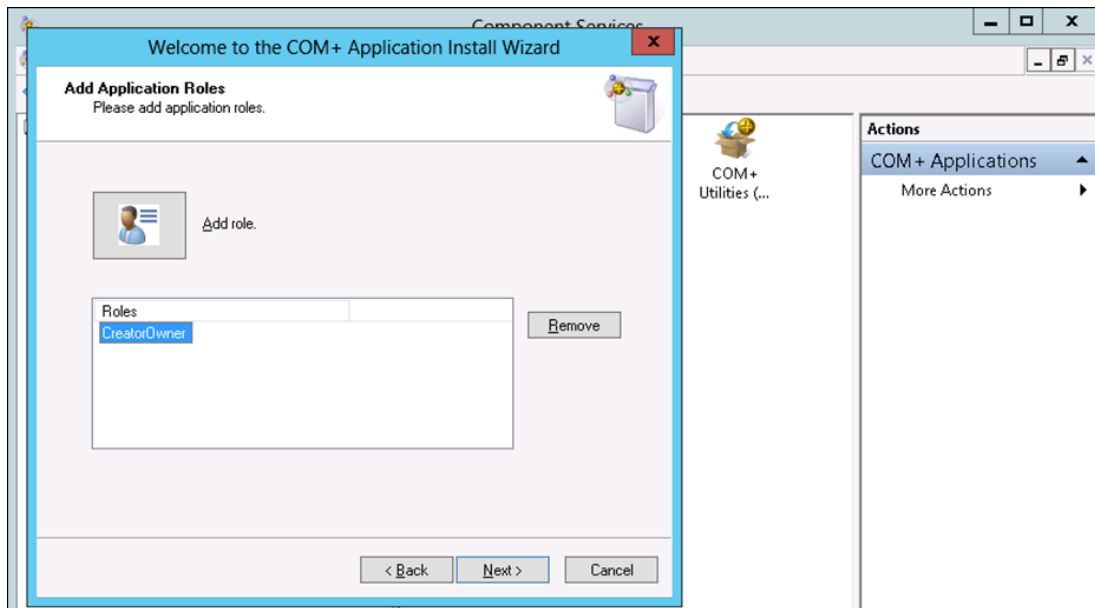
37. After you create or select a user, click **Next**.



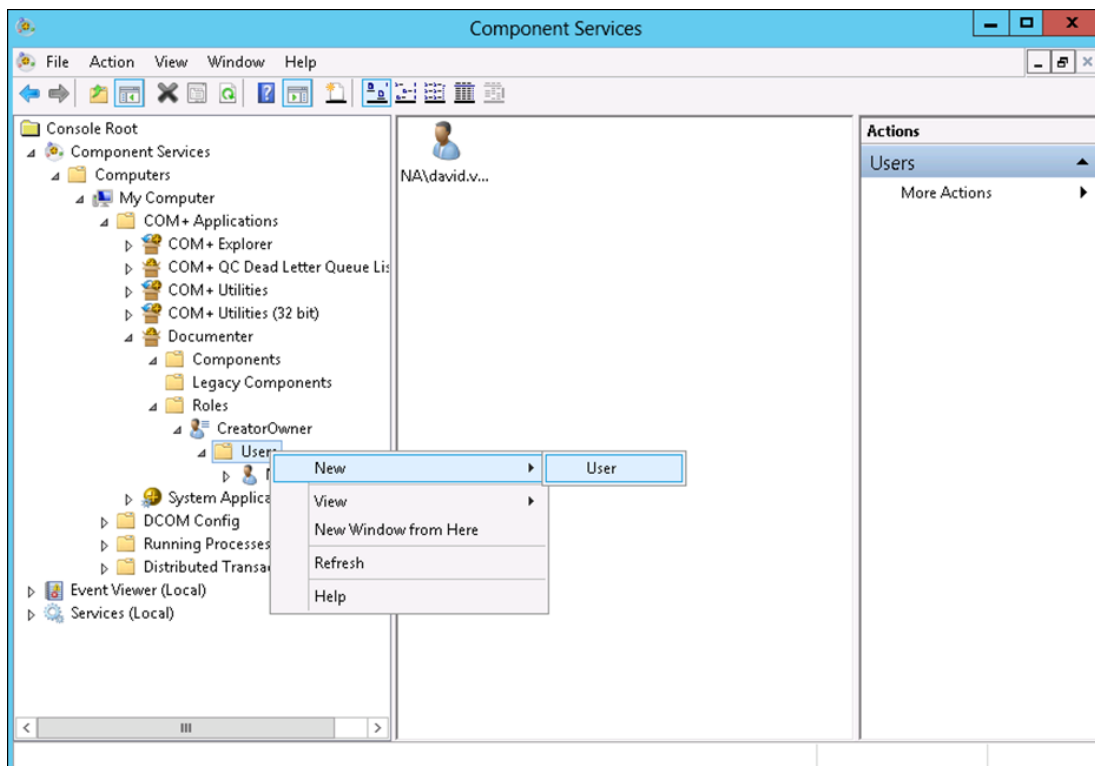
Important

If there is a problem with the administrator, select another user that has full access to both the folders that Medici uses and to the SQL Server. Access to the SQL Server is only necessary when using Windows Authentication, however. If no current user meets the defined requirements, or if there is a need to prevent users from having administrative access, you must create a new user with the appropriate rights.

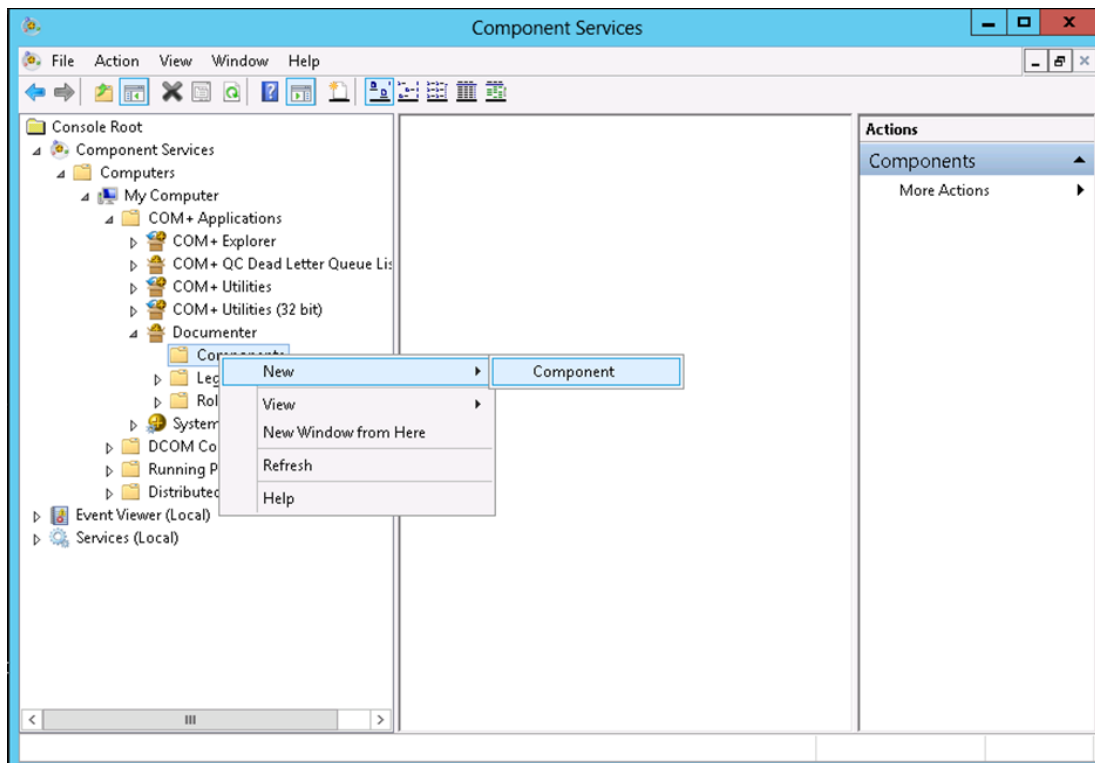
38. You will be asked to add Application Roles and add Users to the roles. Accept the default role, CreatorOwner, click **Next**, and accept the current user. Click **Next** and **Finish**.



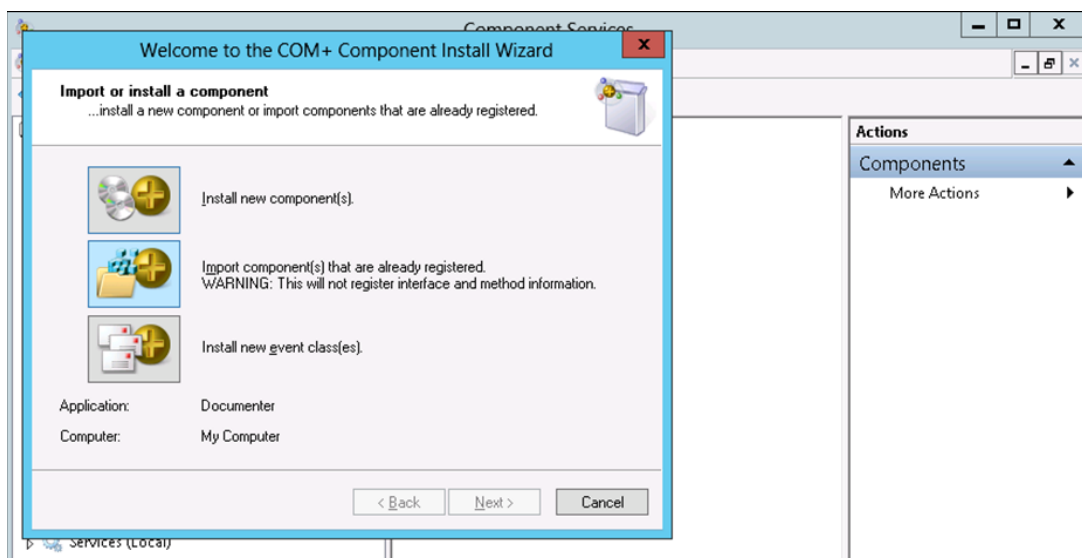
39. Expand Documenter, Roles, and CreatorOwner. Right-right on Users, select **New** and **User**. Add the Medici User Group and click **OK**.



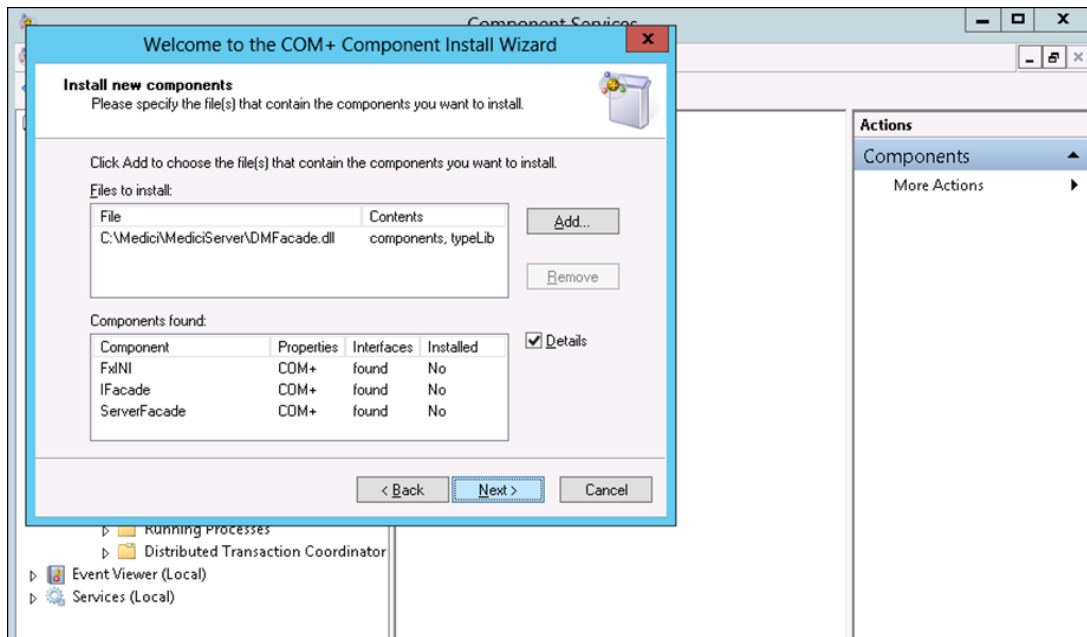
40. Right-click on Components and select **New** and **Component**.



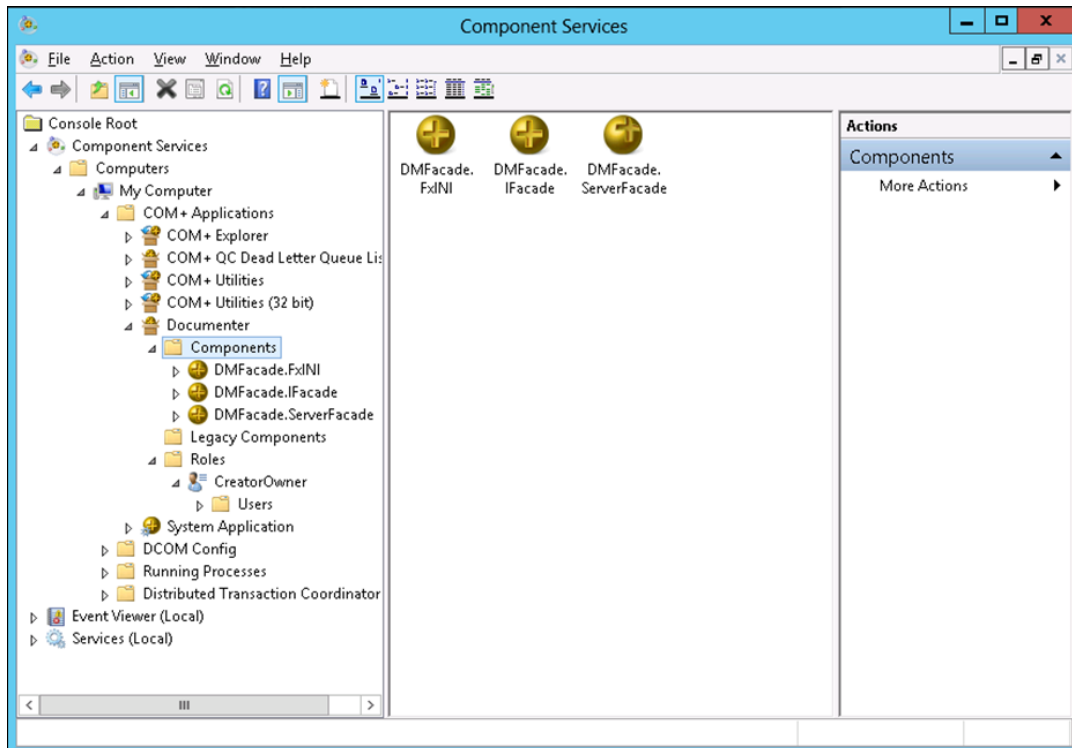
41. Select **Install new component(s)**. Click **Next**.



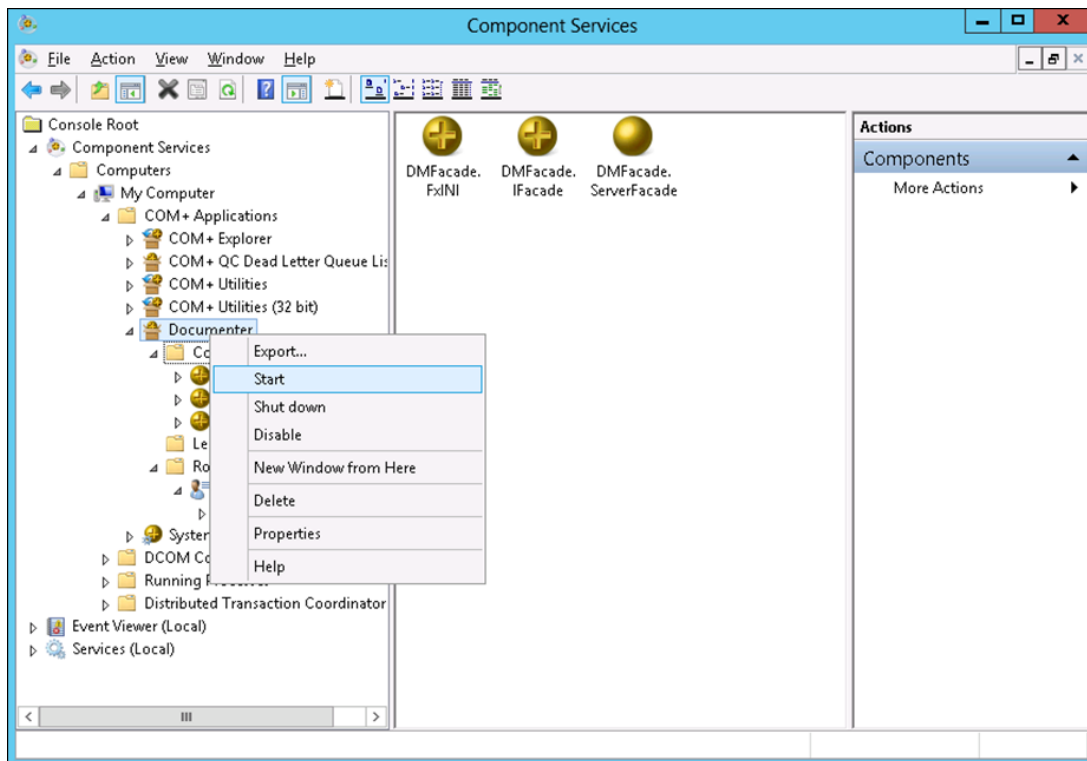
42. Browse to location where the Medici Server was installed. (C:\Medici\MediciServer is the default location)
Select **DMFacade.dll**.
43. Click **Next** and **Finish**. The DMFacade.dll will be installed as a component.



44. Verify the component folder appears as shown below.



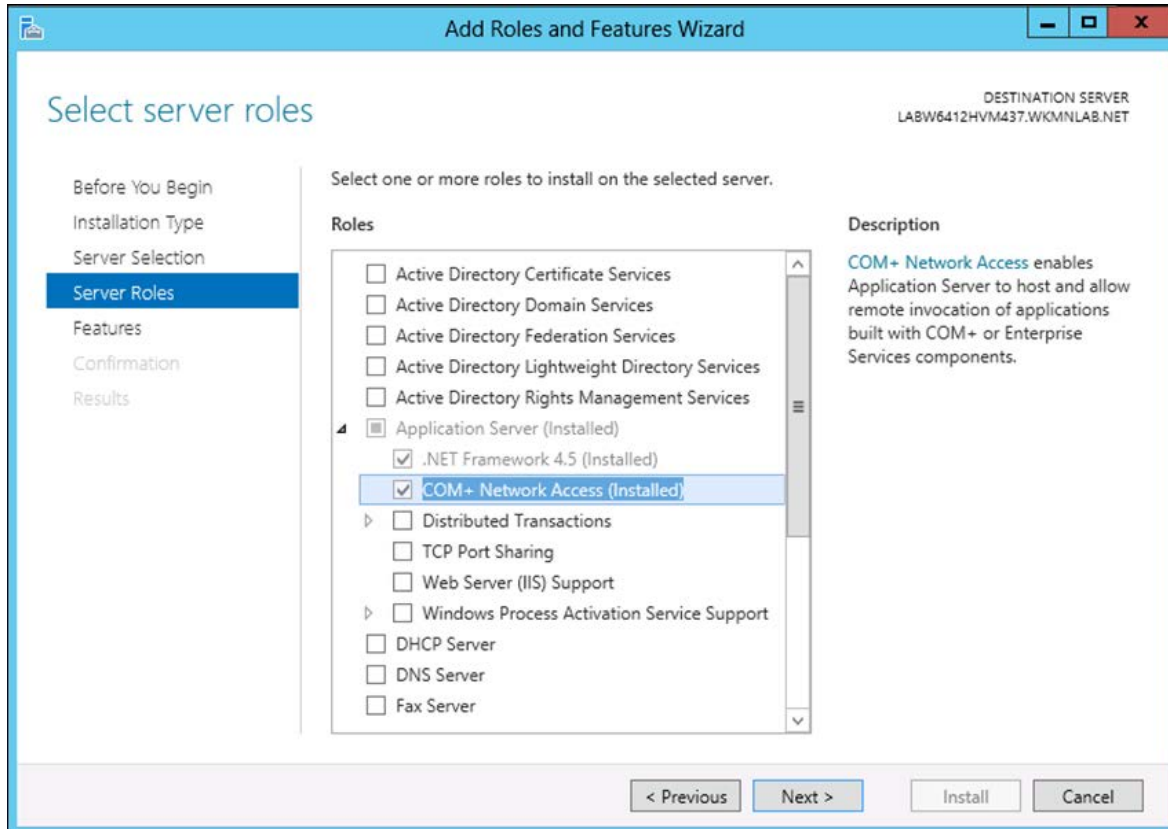
45. Right-click on **Documenter**, and select **Start** to start the service.



COM+ Disabled in Windows Server 2012

The Medici Server requires an enabled COM+. For both new and upgrade users, COM+ may be disabled by default in Windows Server 2012.

To enable COM+, open Server Manager, select **Add Roles and Features, Server Selection, and Local Server**. Click **Next**, expand the Application Server selection, and ensure COM+ Network Access is installed.



Appendix C: Windows Server 2003 or 2008 for COM+ and the Medici Application Server

You must set up your server as an application server and not just a file server. Windows Server 2003 must be at SP1. To enable COM+, add a Domain Level Group to the Distributed COM Users group local to your Windows Server 2003 or 2008 machine and add a new role to the Medici COM+ component containing the Distributed COM Users group as a user.

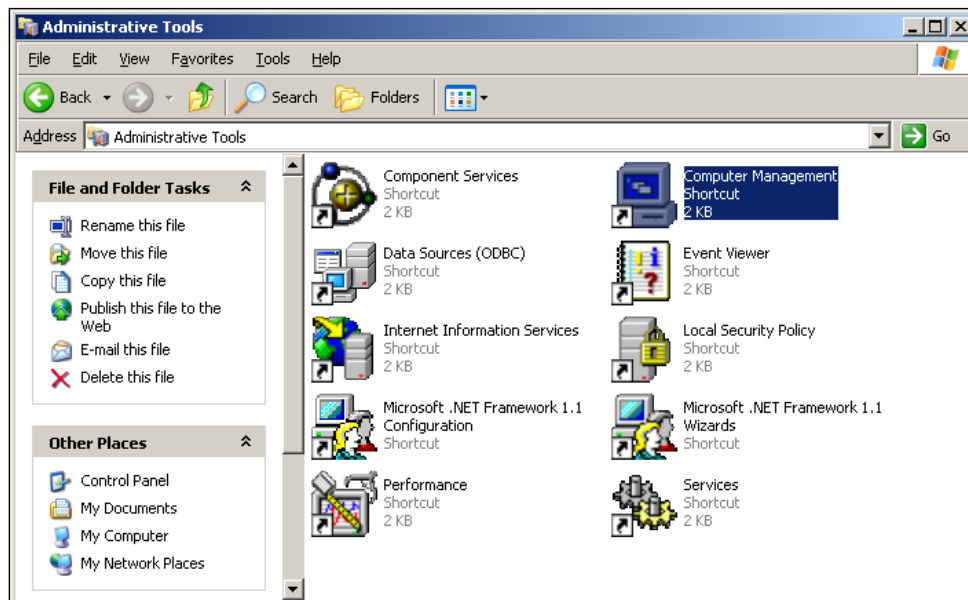
Note

These instructions are additional instructions for the Distributed COM Configuration performed for the standard Application Server installation. You still need to ensure that you enable COM+ and that you have configured the Identity tab of the COM+ Component.

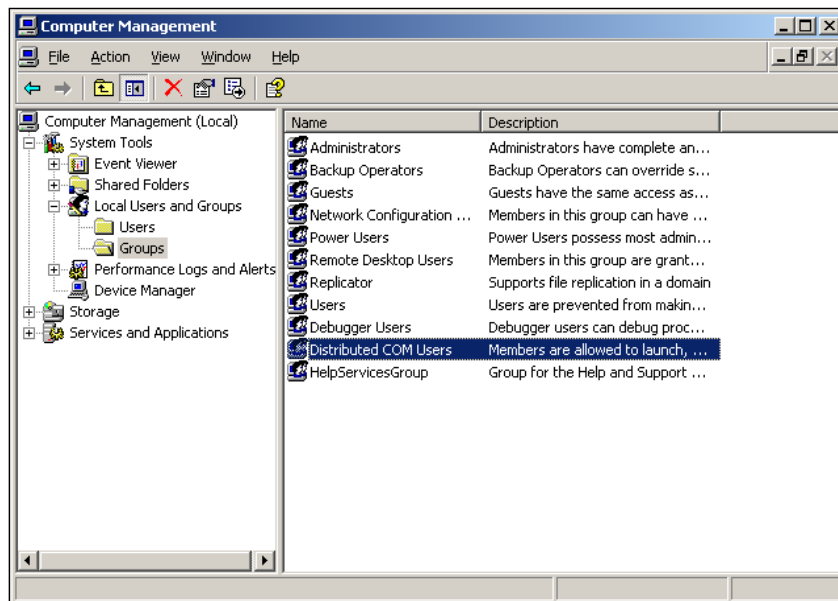
You can find more details on Win 2003 SP1 configurations here:

<http://www.windowsecurity.com/articles/Security-Configuration-Wizard-Windows-Server-2003-SP1.html>.

1. To open Computer Management, click **Start**, click **Control Panel**, double-click **Administrative Tools** and double-click **Computer Management**.



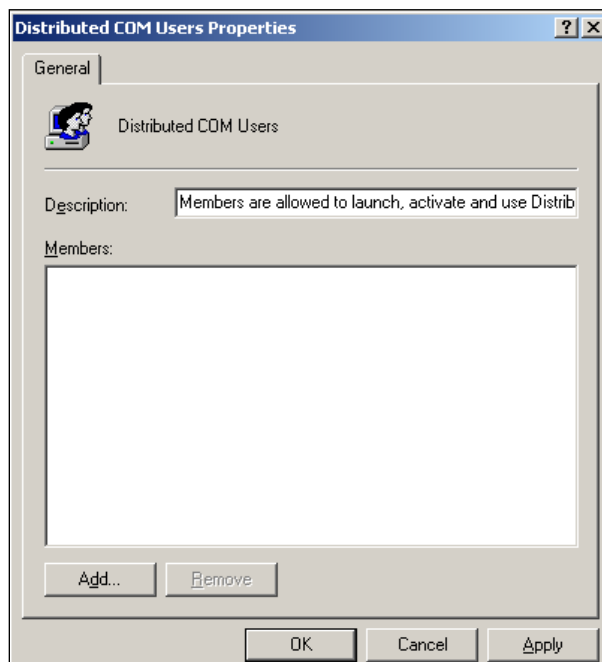
46. To access the Distributed COM Users group, open the **System Tools** node, the **Local Users and Groups** node, and click the **Groups** folder. Double-click the **Distributed COM Users** group.



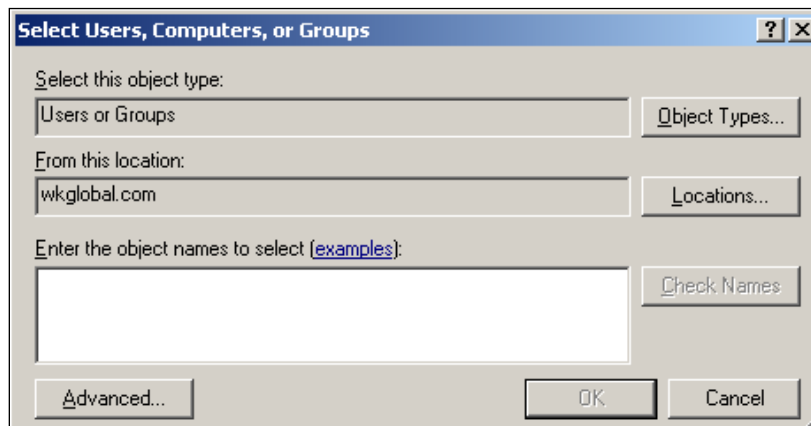
Note

Microsoft added this group to better facilitate how you grant access to users of Distributed COM components.

47. The Distributed COM Users Properties window appears. Click **Add**.



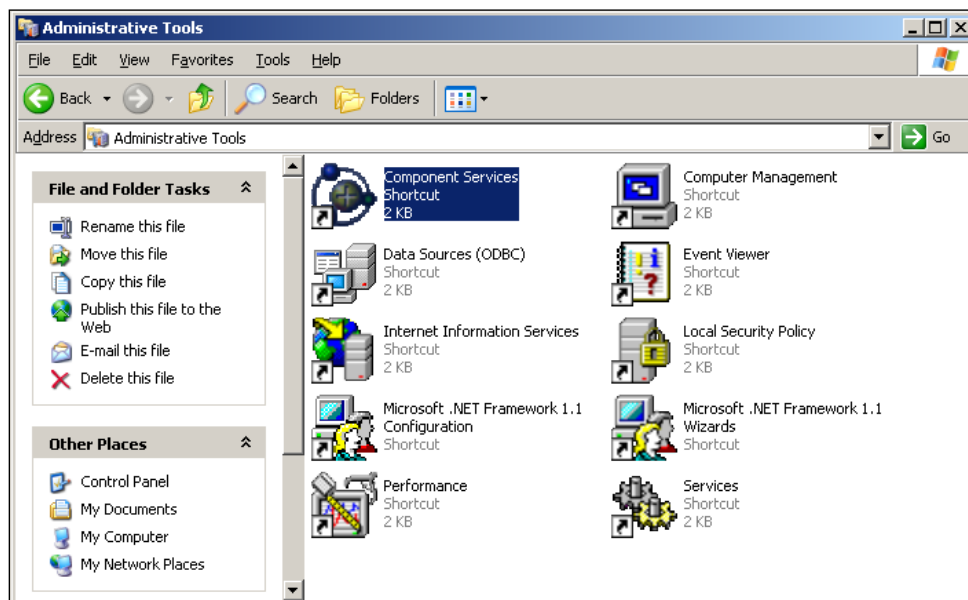
48. The **Select Users, Computers, or Groups** window appears. Verify the object type is Users or Groups, or click **Object Types** to change it. Add your **Medici Group** to the **Distributed COM Users** group by entering its name in the object names field and clicking **Check Names**. Click **OK** to exit this window, click **Apply**, and **OK** to exit the properties window, and then close the **Computer Management** window.



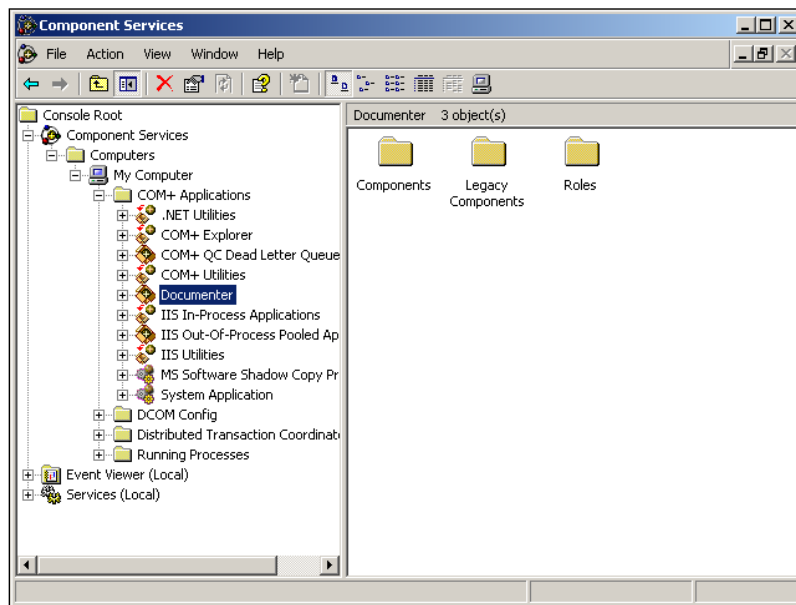
Note

The Medici Group should be the same group you use to maintain access to the shared network location **DMTransaction** path. This allows for easier maintenance if you need to add users to Medici.

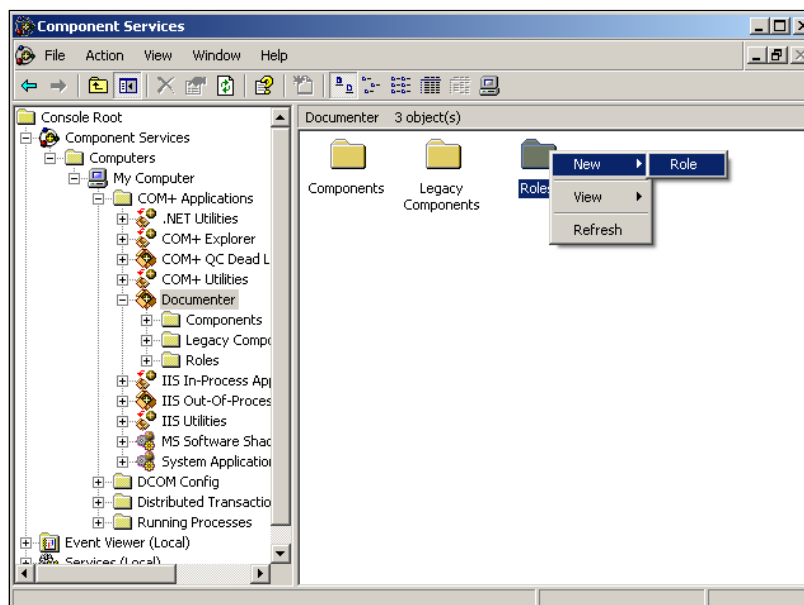
49. To open Component Services, click **Start**, click **Control Panel**, double-click **Administrative Tools** and double-click **Component Services**.



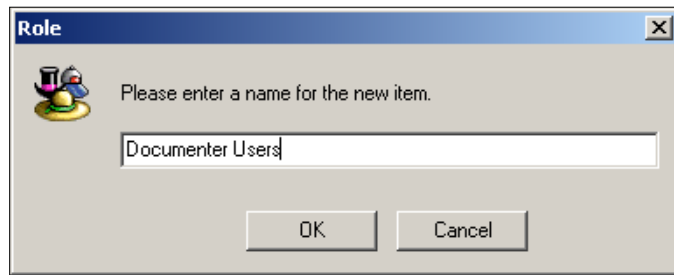
50. The Component Services window appears. To access the Medici COM component, open the **Component Services** node, the **Computers** node, the **My Computer** node, the **COM+ Applications** node, and the **Documenter** node.



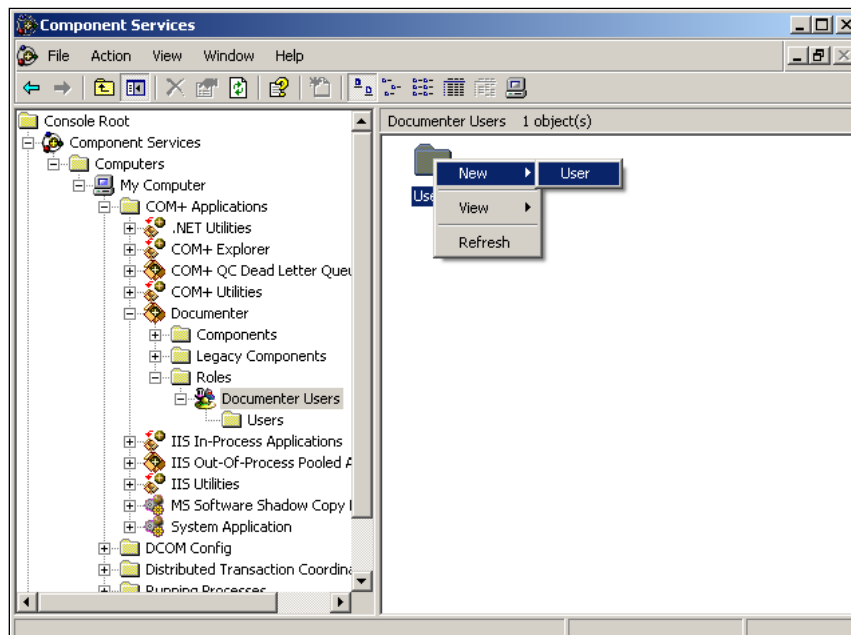
51. Right-click the **Roles** folder under the Medici COM+ Component and select **New** then **Role**.



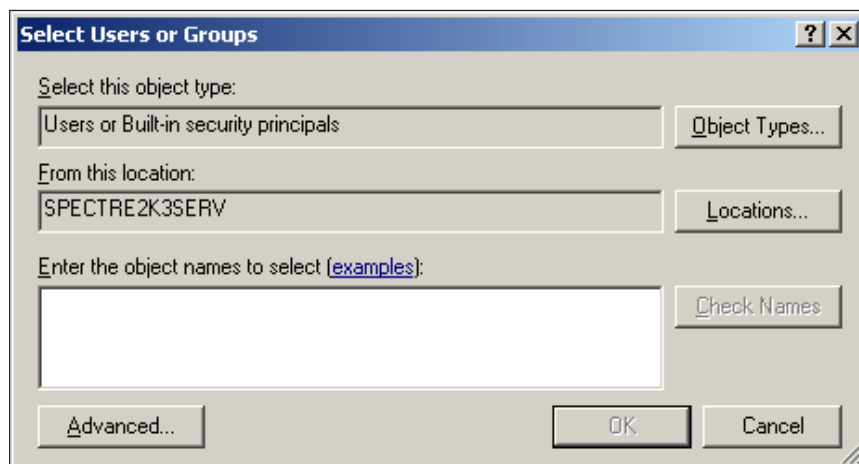
52. The **Role** window appears. Type a name for the new role, such as **Documenter Users**.



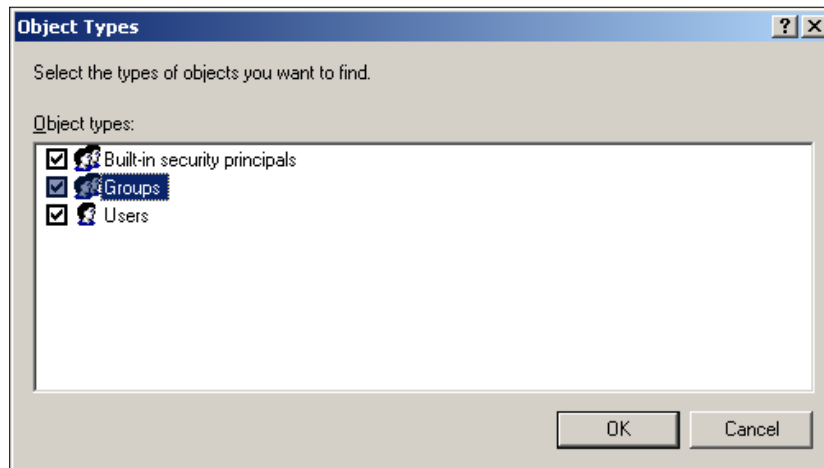
53. Expand the **Documenter Users** node. Right-click **Users** and select **New**, then **User**.



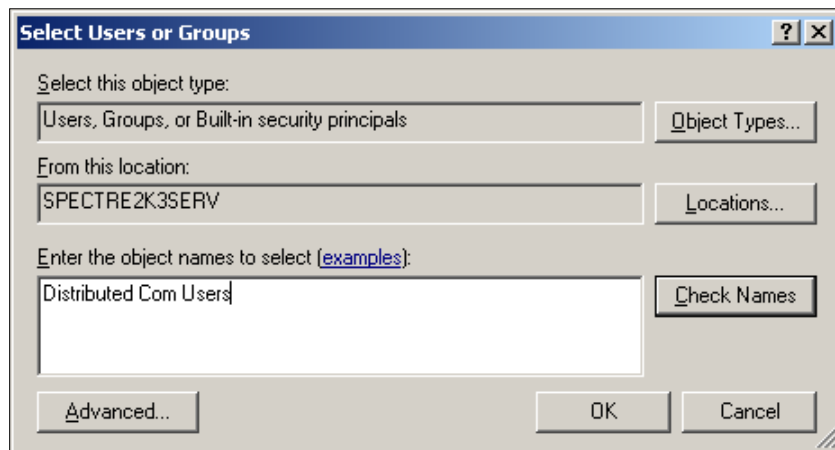
54. The **Select Users or Groups** window appears. Click **Object Types**.



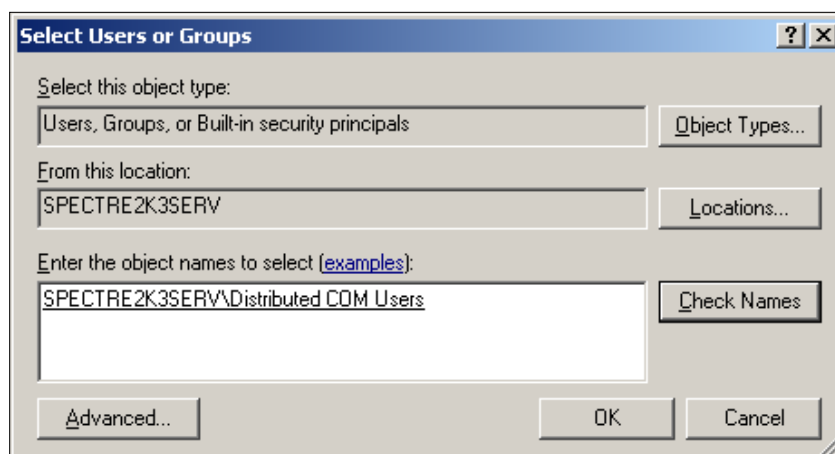
55. The **Object Types** window appears. Select the **Groups** check box and click **OK**.



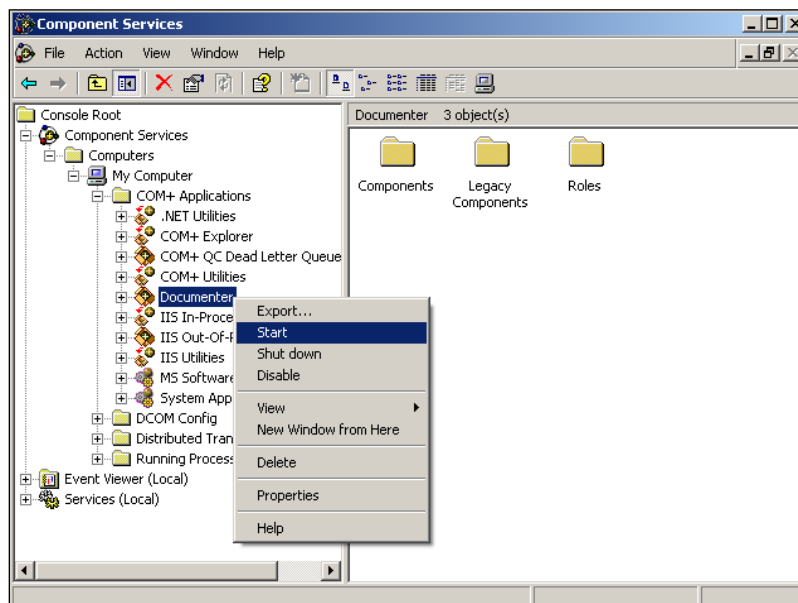
56. Type Distributed Com Users in the Enter the object names to select field and click Check Names.



57. Verify that you see the local machine name and domain appear before the group name. Click **OK**.



58. Right-click **Documenter** and select **Start**. Close the **Component Services** window.

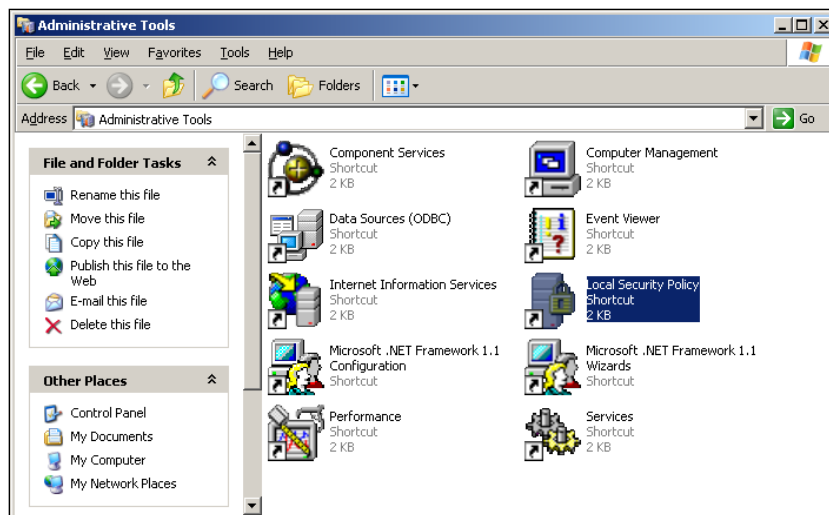


Grant Remote and Local Access

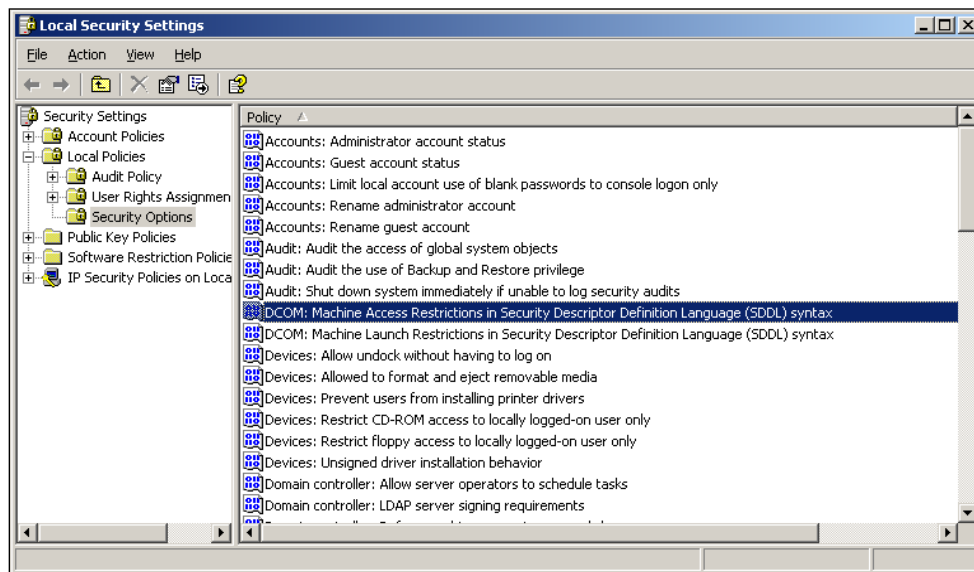
If you are unable to use the Distributed COM Users group, you need to set up a Medici Users group directly into the role of the Medici COM+ component, instead of adding the Medici Users group to the Distributed COM Users group and then adding the Distributed COM Users group to the role of the Medici COM+ component.

If you do need to add the Medici Users group directly to role of the Medici COM+ Component, you must follow these additional steps to grant Remote and Local Access to Distributed COM+ components for this group:

1. To open the Local Security Policy on the server hosting the Medici Application Server, click **Start**, click **Control Panel**, double-click **Administrative Tools**, and double-click **Local Security Policy**.



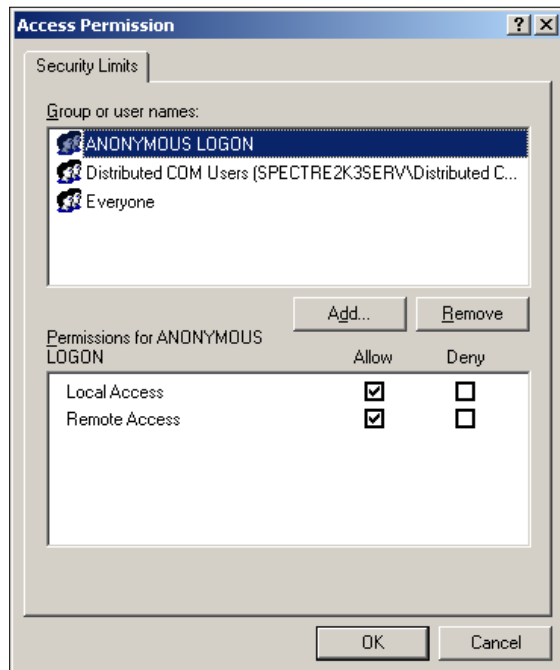
59. The Local Security Settings window appears. Expand Local Policies and select the Security Options folder. Select the DCOM: Machine Access Restrictions in Security Descriptor Definition Language (SDDL) syntax option and press Enter.



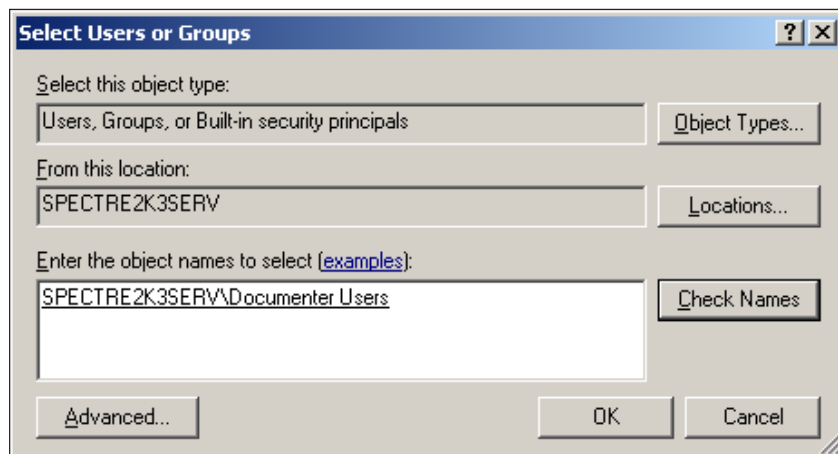
60. The Template Security Policy Setting window appears. Click Edit Security.



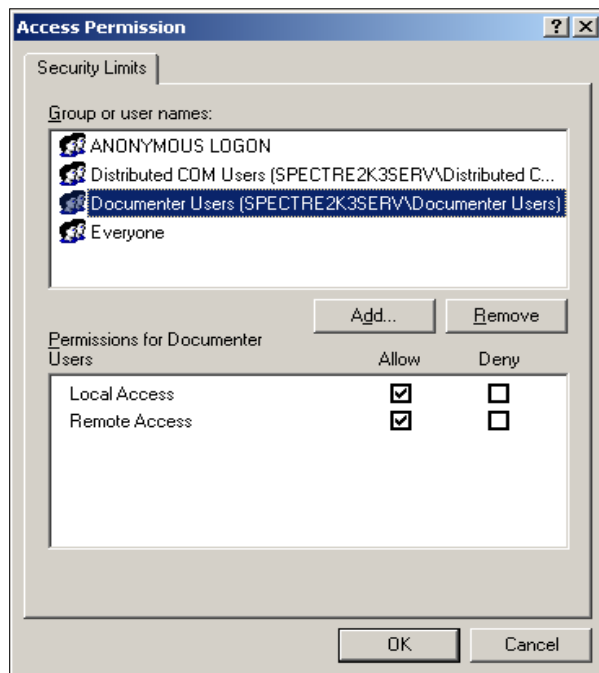
61. The **Access Permission** window appears. Click **Add**.



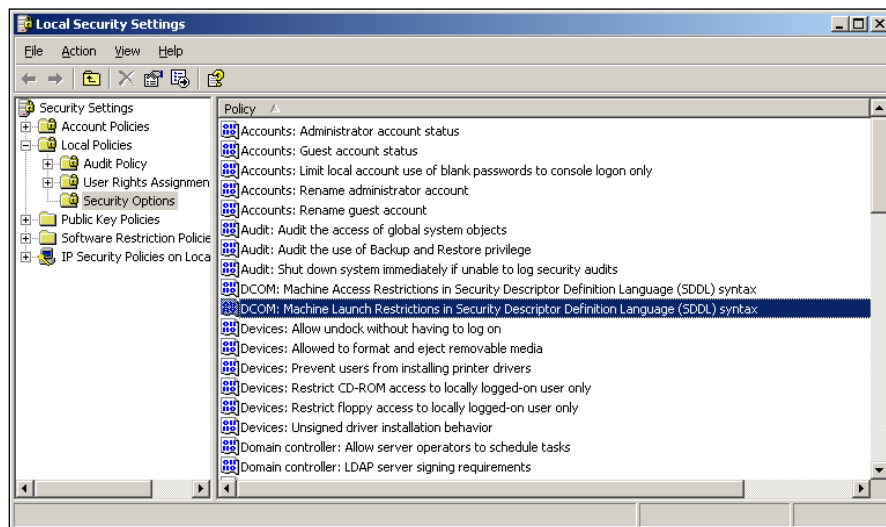
62. The **Select Users or Groups** window appears. Enter the Medici Users group in the **Enter the object names to select** field and click **OK**.



63. In the **Access Permission** window, select both the **Local Access** and **Remote Access** check boxes in the **Allow** column and click **OK**.



64. Click **OK** again to exit the Template Security Policy Setting window.
65. Repeat steps 2-7 for the DCOM: Machine Launch Restrictions in Security Descriptor Definition Language (SDDL) syntax option.



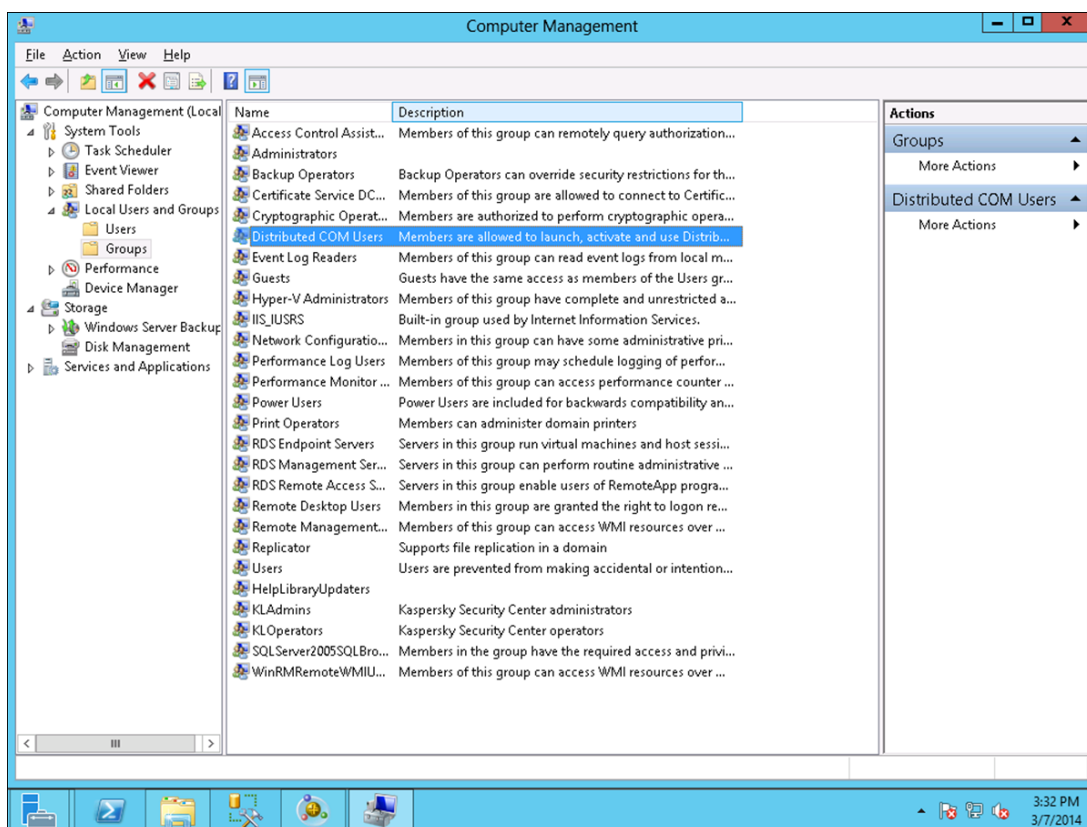
Appendix D: Windows Server 2012 for COM+ and the Medici Application Server

You must set up your server as an application server and not just a file server. To enable COM+, add a Domain Level Group to the Distributed COM Users group local to your Windows Server 2012 machine and add a new role to the Medici COM+ component containing the Distributed COM Users group as a user.

Note

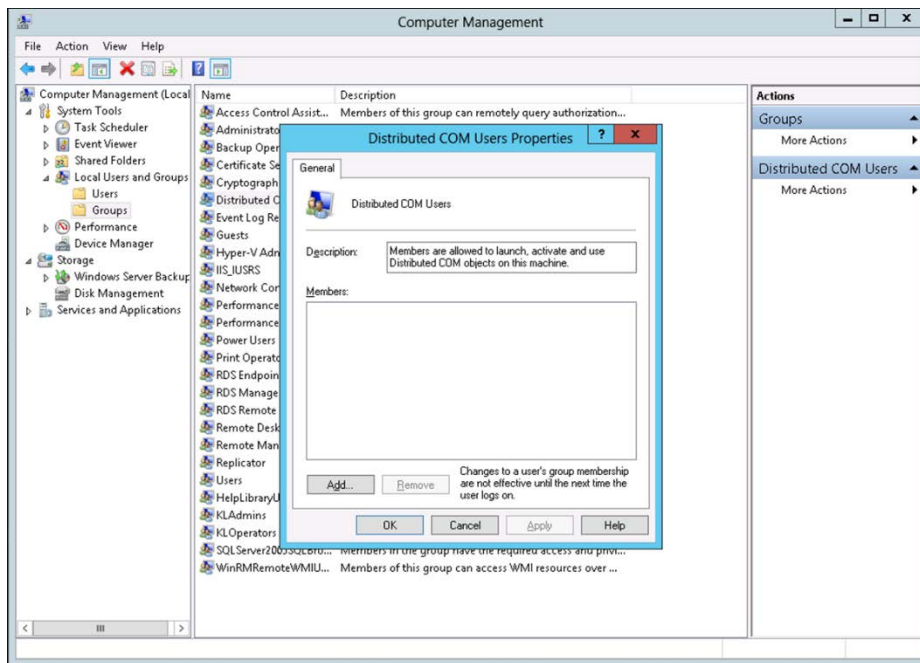
These instructions are additional instructions for the Distributed COM Configuration performed for the standard Application Server installation. You still need to ensure that you enable COM+ and that you have configured the Identity tab of the COM+ Component.

1. Open Computer Management, select **Start**, and **Control Panel**. Double-click Administrative Tools and Computer Management.
66. To access the Distributed COM Users group, expand the **System Tools**, **Local Users and Groups** nodes. Select the **Groups** folder. Double-click the **Distributed COM Users** group.

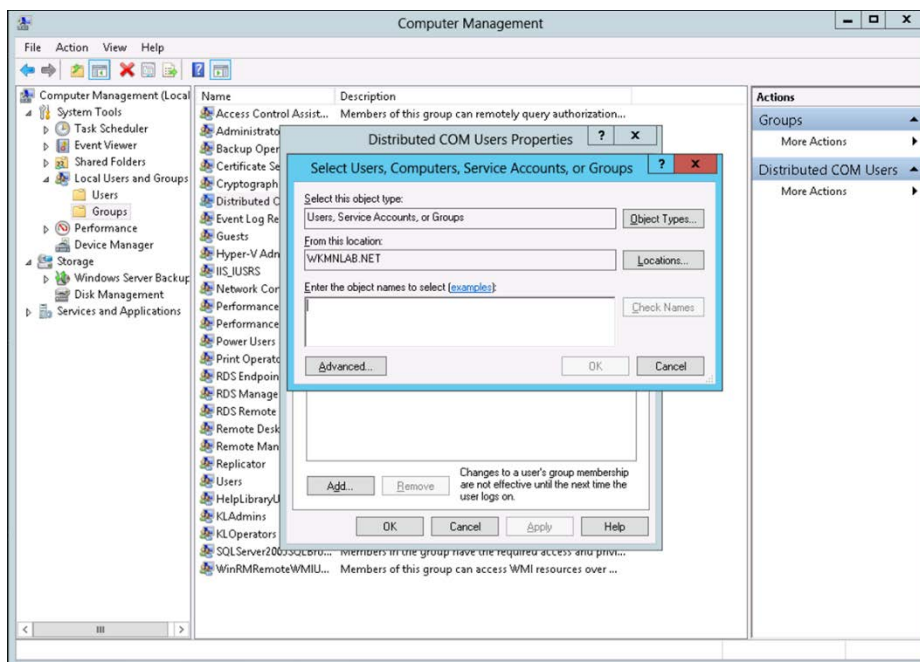


Note: Microsoft added this group to facilitate granting access to users of Distributed COM components.

67. The Distributed COM Users Properties window appears. Click **Add**.



68. The Select Users, Computers, or Groups window appears. Verify the object type is Users or Groups, or select Object Types to change it. Add your Medici Group to the Distributed COM Users group by entering its name in the object names box. Select **Check Names**. Click **OK** to exit this window. Click **Apply** and **OK** to exit the Properties window. Close the Computer Management window.



Note

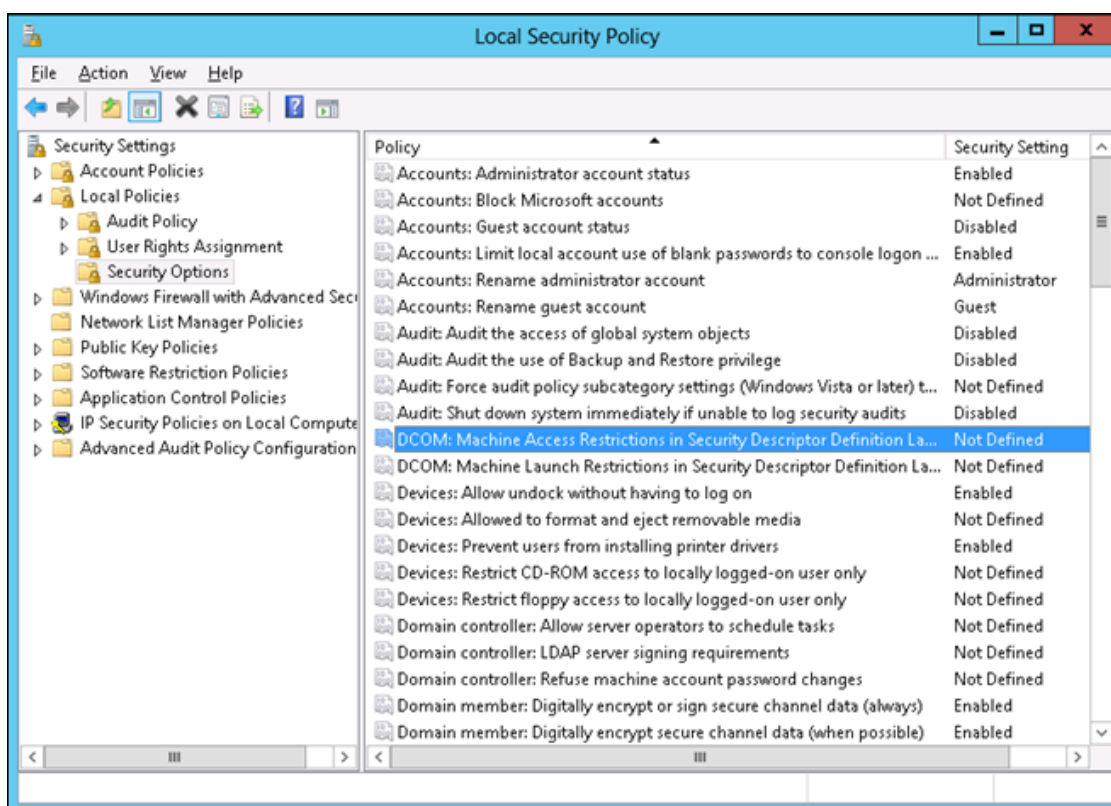
The Medici Group should be the same group you use to maintain access to the shared network location **DMTransaction** path. This allows for easier maintenance if you need to add users to Medici.

Grant Remote and Local Access

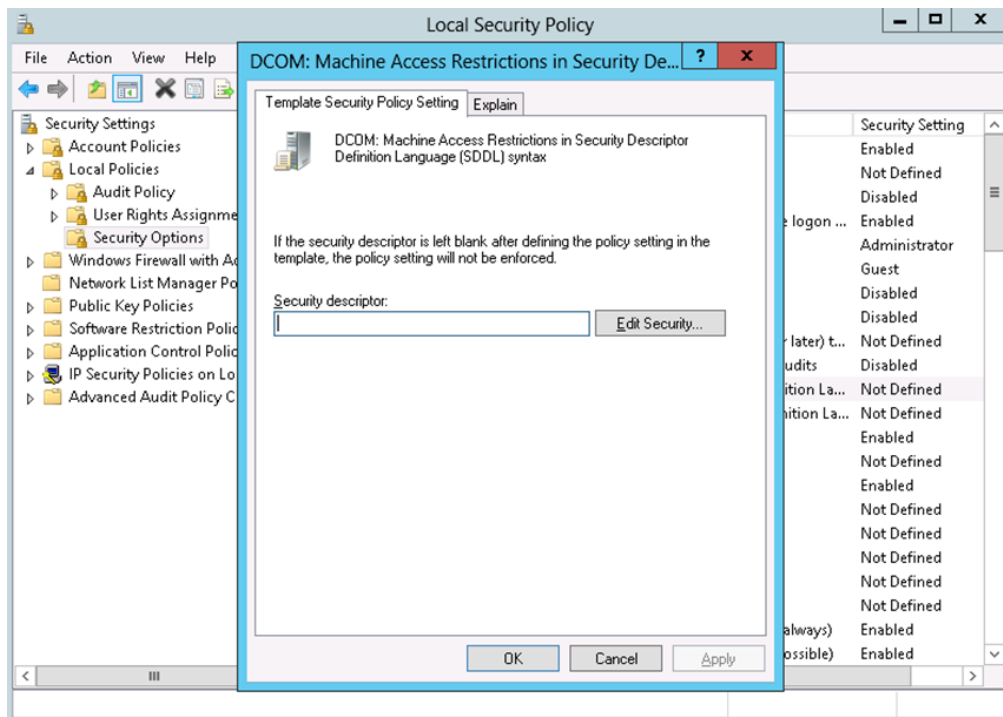
If you are unable to use the Distributed COM Users group, you need to set up a Medici Users group directly into the role of the Medici COM+ component, instead of adding the Medici Users group to the Distributed COM Users group and then adding the Distributed COM Users group to the role of the Medici COM+ component.

If you need to add the Medici Users group directly to role of the Medici COM+ Component, you must follow these additional steps to grant Remote and Local Access to Distributed COM+ components for this group.

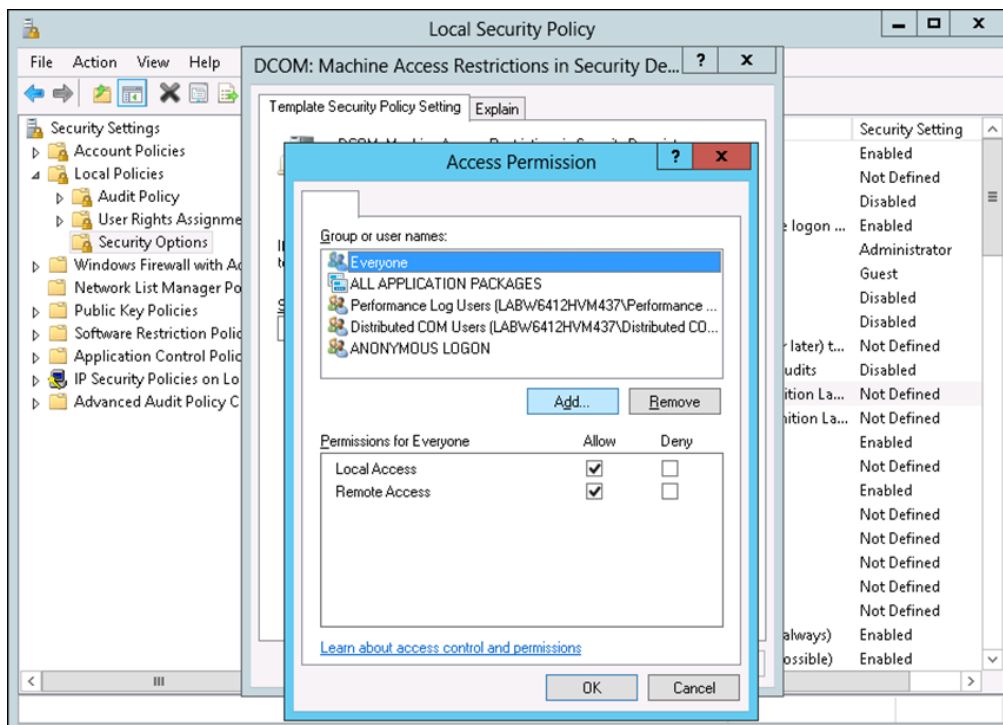
1. Open the Local Security Policy on the server hosting the Medici Application Server.
69. Expand Local Policies and select the **Security Options** folder. Select the DCOM: **Machine Access restrictions in Security Descriptor Definition Language (SDDL) syntax** option and press **Enter**.



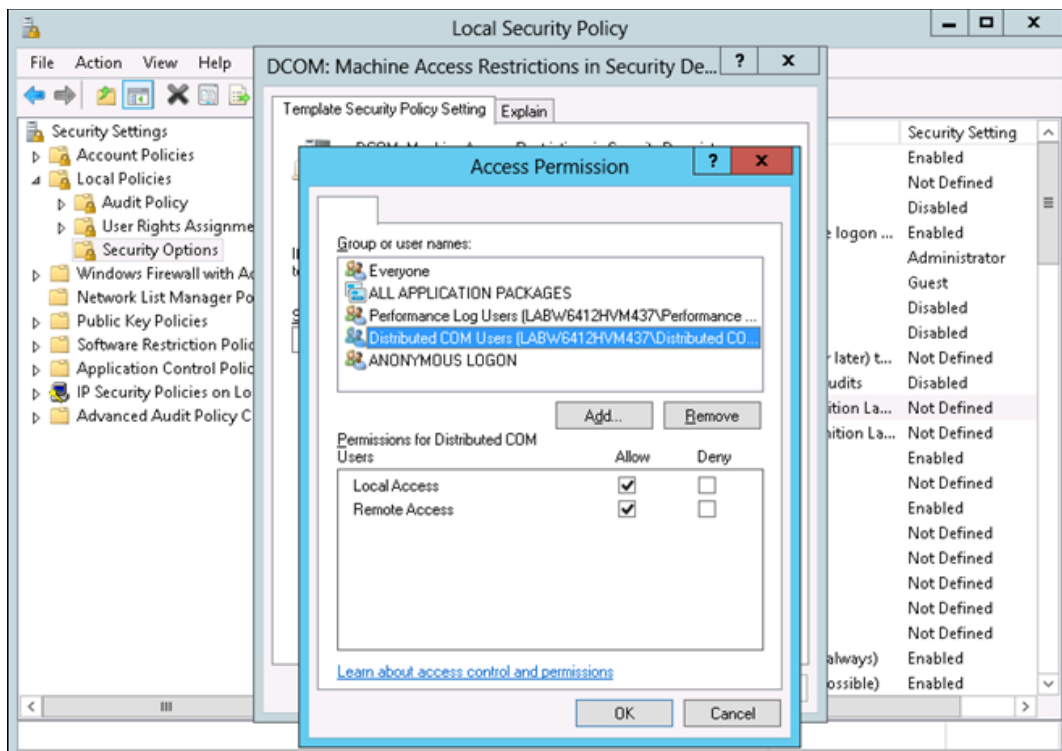
70. The Template Security Policy Setting window appears. Click **Edit Security**.



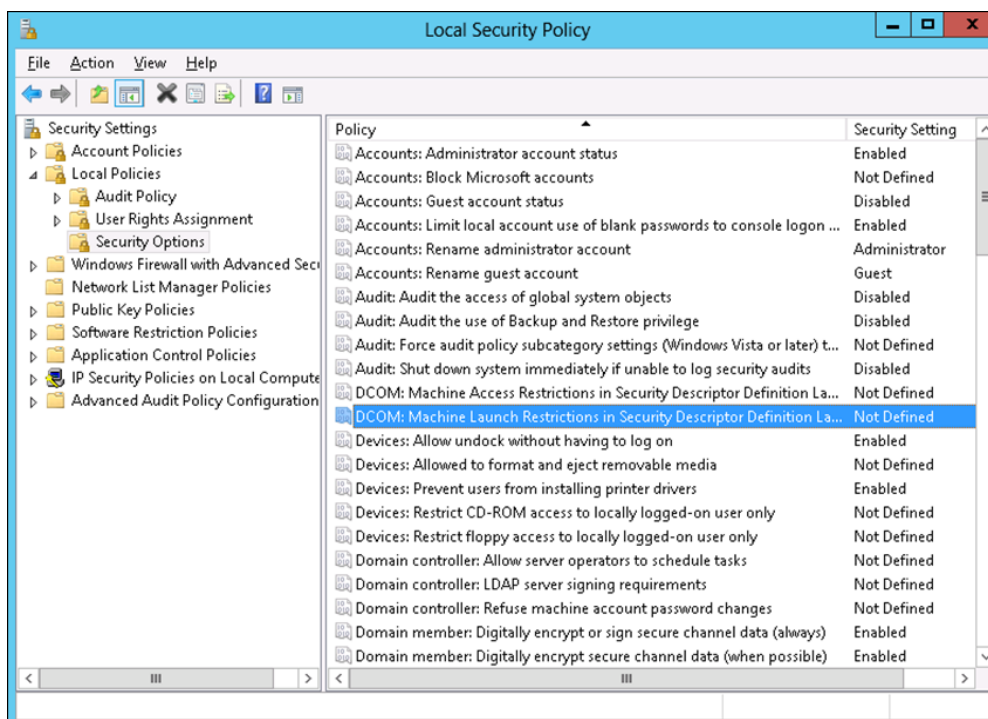
71. The **Access Permission** window appears. Click **Add**.



- [illegible]



74. Click **OK** again to exit the Template Security Policy Setting window.
75. Repeat steps 2-7 for the DCOM: Machine Launch Restrictions in Security Descriptor Definition Language (SDDL) syntax option.



Appendix E: Enabling COM+ for Windows Server 2016

The Application Server role has been removed by Microsoft from Windows Server 2016. It is needed by Medici and you will need to restore it by manually setting the registry value that allows COM+ remote access. To do this:

1. In the Windows Server Start search box, type **regedit**, and click **regedit.exe** in the results list.
76. Locate the following subkey in the Registry Editor:
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\COM3
77. Right-click the **RemoteAccessEnabled** DWORD.
78. In the Value data box, enter **1**.
79. Click **OK**.

Additional information can be found at <https://support.microsoft.com/en-us/help/3182294/0x80004027-error-when-you-try-to-remotely-access-com-object-after-you>.

Appendix F: Medici System Configurations

There are different ways to configure Medici. Larger institutions often network all the various features on different machines: the SQL Server on one machine, the Medici Server on a second machine, the DMTransaction folder for the output files on a third machine, and then the client feature on individual workstations. Other institutions may choose to house the SQL server and Medici Server on one box, with the DMTransaction folder on a separate file server.

Based on the number of machines you want to use to run Medici, there are different configuration options:

3-Tier Configuration

Perform a 3-Tier installation if you want to have three separate machines running the three main features of the Medici application; one for the Database, one for the Medici Server, and one for each of the Medici Client workstations.

2-Tier Configuration

Perform a 2-Tier installation if you want to split the three main Medici features of Database, Medici Server and Medici Client between two separate machines, which you may accomplish in a variety of ways.

1-Tier Configuration or Stand-Alone Implementation

Perform a 1-Tier installation if you want to have all three Medici features on one machine: Medici Client, Medici Server and Database.

Note

4-Tier Configuration - The placement of the DMTransaction folder can create an extra “tier” for any of the above configurations if the folder is located on a different machine. The transaction folder is shared and typically exists on a network file server, so it is accessible to all client machines.

Any machine that houses the DMTransaction folder needs to have its disk free space monitored over time. The transaction files increase in direct relation to the number of loan documents created.

Changing Configuration during Upgrade

Note that if you want to change your existing configuration as part of your upgrade, first [un-install the previous release of Medici](#) from all machines and when installing the new release of Medici, select your new configuration.

Appendix G: Medici Configuration Settings Utility

Overview

The Medici Configuration Settings Utility is designed to help customers set/change configuration settings which can affect how the Medici Application behaves. The configuration settings are applied system-wide and not on a user-by-user or desktop-by-desktop basis.

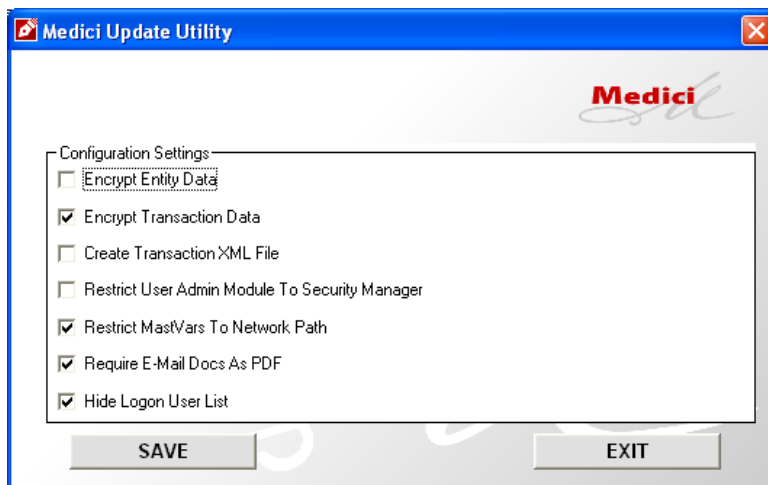
Installation

No installation is necessary. The "Configuration Settings.exe" is a stand-alone application that works with an existing Medici installation. The utility can be run from either an installed client (desktop) or from the application server where the Medici Server Application is installed. It is recommended the utility be used by a Medici system administrator, and the tool be used from a location that has limited access to general users.

Running the Utility

Double-click the "Configuration Settings.exe" to launch the utility. The following screen will appear and the settings on the initial screen will reflect the current configuration settings in your environment.

The Utility Main Screen will reflect the current configuration settings in your Medici System. Your settings may differ from this graphic.



Settings

The settings you can make and their descriptions are provided below.

- A. **Encrypt Entity Data: *No longer used*.** This item is a relic and is no longer in use. Changing the setting on this will not affect anything in the Medici Application. Primary entity information (SSN/TIN) is automatically encrypted when entered into the Medici system.
- B. **Encrypt Transaction Data:** Specific data items in each transaction that are considered as "non-public information" (SSN/TIN, names of parties to a transaction, etc.) are encrypted when stored in the transaction data store. Should anyone gain access to the specific data store for a transaction, this sensitive information will be encrypted and will be useless.
 - TRUE (checked): The data considered "non-public" is encrypted when at rest in the specific transaction data store.

- FALSE (unchecked): The data considered "non-public" is not encrypted when at rest in the specific transaction data store.
 - DEFAULT: False
- C. Create Transaction XML File:** Each transaction in the Medici system is represented in an XML format, and that XML contains all the information pertinent to the transaction. Normally, this data is written out to a file with a ".xml" extension and resides in the specific folder for each transaction. By setting this item to "False" (unchecked), the XML data will be stored only in the Medici database and will never be stored as a file on disk. This can improve your overall security for transaction data.
- TRUE (checked): The xml data will be written to a file stored with the transaction on disk
 - FALSE (unchecked): The xml data is stored in the Medici database, and is never written as a file to disk.
 - DEFAULT: True
- D. Restrict User Admin Module to Security Manager:** Beginning with Medici 3.9, a new "role" has been introduced for Users of Medici. The "Security Manager Role" is intended to designate a specific user as someone that only deals with the User Admin module, where security settings and user permissions are configured in the Medici Application. A user designated as a Security Manager does not have access to any other part of the Medici Application; this role specifically limits a user to accessing **only** the User Admin module, regardless of the permissions you grant the user or the group you assign the user into.

Note

- A user that is designated as both an Admin user and a Security Manager still has access to all areas of the application.
 - By setting this item to "True", the Use Admin module will only be accessible to users designated as a Security Manager. If you turn this item on and have not designated a user as a Security Manager, then no one will have access to the User Admin module.
 - TRUE (checked): Access to the User Admin module in Medici is available only to users that are designated as Security Managers. No other users (not even an Admin user) will be able to access the module.
 - FALSE (unchecked): Access to the User Admin module is available to Security Managers, Admins and any other users that have been granted specific permissions to access the User Admin module.
 - DEFAULT: False
 - A user that is designated as both an Admin user and a Security Manager still has access to all areas of the application.
 - By setting this item to "True", the Use Admin module will only be accessible to users designated as a Security Manager. If you turn this item on and have not designated a user as a Security Manager, then no one will have access to the User Admin module.
-

- E. Restrict MastVars to Network Path:** Each transaction in Medici contains its own data store for information about that transaction. This data store can be used for processing on the local client desktop during document generation after which it is moved back to the shared network directory for the transactions. This can improve performance during document generation. However, if you are concerned about any security or maintenance issues which might arise from having this data store on local desktops, you can configure Medici so that the data store will never be moved onto or saved on the local client machine.
- TRUE (checked): The transaction data store will not be moved to or used from the local client desktops.
 - FALSE (unchecked): The transaction data store will be used from the local client desktops during document generation.
 - DEFAULT: False

Note

Setting this item to True may adversely affect performance during document generation in the Medici system. If you elect to use this setting, we recommend that you test the performance during document generation.

- F. Require Email Docs as PDF:** This item is a relic and is no longer in use. Changing the setting on this will not affect anything in the Medici Application. Primary entity information (SSN/TIN) is automatically encrypted when entered into the Medici system. Instead, controlling the format of email attachments can be controlled on a user or group basis from the Medici User Admin module. Use the settings for "Disable PDF Format" and "Disable Office Format."
- G. Hide Logon User List:** When Medici is configured to have users logon by entering a Medici Username and Password, the application provides a drop-down list of available Medici Usernames from which the user can select. Some customers may feel this represents a potential security issue, since anyone attempting to login to the system would be shown a list of valid usernames. This setting will change the Medici logon so that no user names are shown. A user attempting to logon to the Medici application will have a logon available, but there will be no drop-down list of usernames. Instead, the user will need to enter in the correct username for their logon.
- TRUE (checked): The logon form will not contain a dropdown list of available Medici usernames.
 - FALSE (unchecked): The logon form will contain a dropdown list of available Medici usernames.
 - DEFAULT: False

Note

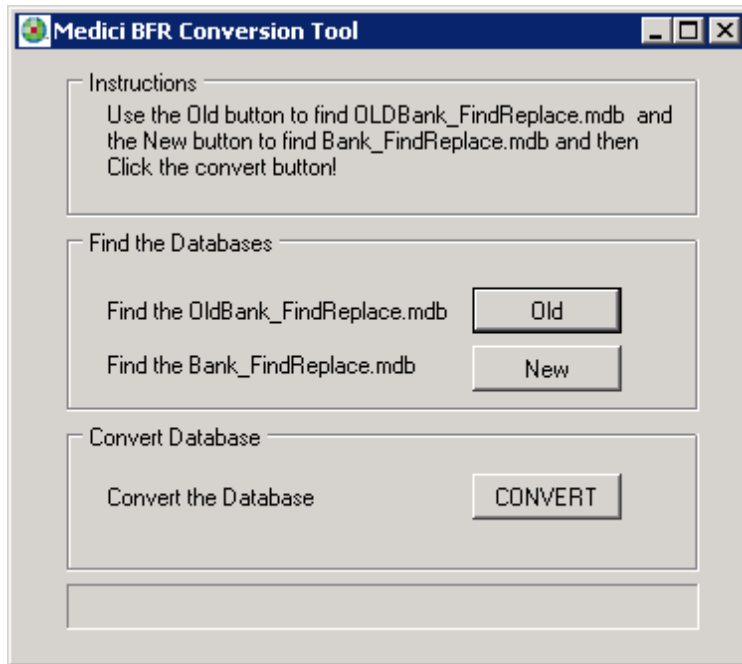
If Medici is configured to use single-sign-on authentication, this setting has no effect.

- H. Transaction ID Maximum Length:** The Medici application has a limit on the length of the name that can be used for a transaction. Historically, this has been 30 characters. To allow customers greater flexibility in their transaction naming conventions, customers can now configure Medici to accept longer transaction names. This setting can be used to configure the length of transaction names to be up to 64 characters. If this setting is changed to a value less than the minimum length or more than the maximum length listed below, Medici will automatically adjust the allowable length.
- MINIMUM LENGTH: 30 is the minimum value for this setting
 - MAXIMUM LENGTH: 64 is the maximum value for this setting.
 - DEFAULT: The default Transaction ID length is 30 characters.

Appendix H: Bank Find and Replace

Run the Conversion Tool

1. To run the conversion tool, on a client machine browse to the MediciClient folder, typically located under C:\Medici, or to the folder you indicated during the install.
2. Double-click **Medici Conversion Tool.exe**. The main screen appears.



80. Click **Old** and browse to the **Bank_FindReplace.mdb** which you backed up in the pre-install steps. **Note** that the label next to the Old button indicates the filename is OldBank_FindReplace.mdb but you did not need to rename the file when you backed it up.
81. Click **New** and browse to the Word Automation folder, typically under C:\Medici\MediciClient\Word Automation. Select **Bank_FindReplace.mdb**.
82. Click **CONVERT** to start the conversion process.
83. When the conversion is complete, the conversion complete message appears.
84. Click **OK** to exit the Medici BFR Conversion Tool.