

Governance, Risk & Compliance

TSoftPlus Installation Guide

Document Preparation

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Governance, Risk & Compliance

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System Requirements

Introduction

Use this information as a guide to identify the hardware and software components needed to implement TSoftPlus. All requirements are for systems running TSoftPlus only. You will need to take into consideration any additional software that will be running in your environment, as this will increase the listed requirements.

Server Hardware

These minimum requirements are for TSoftPlus only. Additional hardware may be needed if you are using additional applications.

- Multicore Intel/AMD processor
- 8 GB RAM or greater
- 7 GB hard disk space or greater

Server Software

- One of the following server operating systems:
 - Windows Server 2012
 - Windows Server 2012 R2
 - Windows Server 2016

Note:

No 32-bit operating systems are supported for server use.

Note:

After disabling TLS 1.0, it is required that you enable the use of strong cryptography. More information about how to enable strong cryptography can be found at: <https://docs.microsoft.com/en-us/dotnet/framework/network-programming/tls#configuring-security-via-appcontext-switches> Also, more information on minimum builds and patches required by SQL Server to support TLS 1.1 or 1.2 can be found at <https://support.microsoft.com/en-us/help/3135244/tls-1-2-support-for-microsoft-sql-server>.

- Microsoft SQL Server 2012/2014/2016 (supplied with the TSoftPlus installation files). If you have an existing instance of SQL Server, you will need to have TCP/IP enabled on the machine hosting SQL Server. PowerShell might be required if additional database tools are installed.

Note:

If you perform over 100 transactions a year, we recommend you use a full version of SQL Server, not SQL Server Express, so all transactions can be stored in their original form for seven years.

Note:

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

- Internet connectivity
- Internet Information Services (IIS) 6 or later. This program must be installed and functional on the server before installing TSoftPlus. Wolters Kluwer Financial Services cannot provide assistance with implementing IIS beyond the information contained in the TSoftPlus Installation Guide.

Note:

IIS6 compatibility tools need to be installed as a prerequisite on Windows 2008 or Windows 7. For more information, refer to the IIS6 section in the TSoftPlus Installation Guide.

Note:

If you are on Windows Server 2008 R2 with IIS 7.5, you must have the Application Initialization Module for IIS 7.5 installed. This can be done through the web installer on the server or downloaded near the bottom of the page at <https://www.iis.net/downloads/microsoft/application-initialization>.

- Microsoft .NET 4.6.2 Framework
- Windows Identity Foundation Runtime
- Transport Layer Security (TLS) Protocol 1.2 Implemented
- .NET Core Runtime 1.0.4 or the most recent 1.X runtime listed, available for download at <https://www.microsoft.com/net/download/core#/runtime>. Do not use a 2.X .Net Core runtime.
- .NET Core Windows Server Hosting 1.0.4 or the most recent 1.X runtime listed, available for download at <https://www.microsoft.com/net/download/core#/runtime>. Do not use a 2.X .Net Core runtime.

Client Hardware

Additional hardware requirements to run TSoftPlus for the client are generally not needed. You should take into account all software that you anticipate using in selecting a suitable hardware platform. The hardware you select to support a particular operating system should be adequate for daily use of the TSoftPlus client.

Client Software

All users within an institution must use the same version of Microsoft Office to successfully open and save documents using the Loan Authorization Wizard and Financial Analysis Spreadsheets. Required software, including the operating system, includes:

- Windows 7 Professional or Ultimate, 32- or 64-bit
- Windows 8.1, 32- or 64-bit
- Windows 10, 32- or 64-bit
- Internet connectivity
- Microsoft .NET 4.6.2. Framework
- Microsoft Word 2010, 2013, 2016 or 365 (as included with Office 365)
- Microsoft Excel 2010, 2013, 2016 or 365 (as included with Office 365)
- Microsoft Internet Explorer 11 or later or Google Chrome 19 or later
- Adobe Acrobat Reader 5.0 or later

Note:

After disabling TLS 1.0, we recommend you enable the use of strong cryptography. More information about how to enable strong cryptography can be found at: <https://docs.microsoft.com/en-us/dotnet/framework/network-programming/tls#configuring-security-via-appcontext-switches>

Standalone

For Standalone installations, TSoftPlus requires the use of Microsoft Word and Excel. Therefore, due to simultaneous operation, a 64-bit operating system with a minimum of 8 GB RAM is recommended.

Software as a Service (SaaS) Environment

More detailed information on software and hardware requirements for using the SaaS version of TSoftPlus can be found in the latest *TSoftPlus_System_Requirements_SaaS.pdf*.

Additional Notes

Service Packs

The most current service pack is required for all Microsoft applications.

Backup/Restore

Backups are the sole responsibility of your institution. Your backup software may require an additional module to allow backing up of database files.

Unsupported Operating Systems or Installations

The following operating systems or installation environments are not supported or no longer supported by TSoftPlus:

- Novell Netware - TSoftPlus utilizes Microsoft IIS to create the screens and Microsoft SQL Server to manage the database and these cannot be installed to or run from a Novell NetWare file server.
- Microsoft Small Business Server
- Microsoft BackOffice Server
- Active Directory Server (Domain Controllers) - TSoftPlus should not be installed on a domain controller.
- Exchange Server - TSoftPlus should not be installed on a Microsoft Exchange Server.
- Windows Millennium Edition
- Windows XP, server or client
- Windows Vista Home
- Windows 7 Home Premium
- Windows Server 2003

Configuration Requirements

Confirm Installation of Windows Identity Foundation Runtime

For both new and update installations for this release, you need to confirm that the Windows Identity Foundation (WIF) runtime has been installed on your server before installing or updating TSoftPlus. To determine if it is installed, open Control Panel, Programs and Features. Click the link on the left, View Installed Updates. Scroll down to the Microsoft Windows section to find the entry for WIF.

Microsoft Windows (202)			
	Windows Identity Foundation (KB974405)	Microsoft Windows	Microsoft Corporation 3/24/2014

If you do not have an entry for WIF you can download it from Microsoft for free at <http://support.microsoft.com/kb/974405>. Note that there are separate download packages for Windows Server 2003 and 2008.

Installation Prerequisite—DacFramework.msi version x86

The x86 version of DacFramework.msi is now required. The file "SQLPackage.exe" must be located in the C:\Program Files (x86) path for the installer to find it. The package can be obtained from: <https://docs.microsoft.com/en-us/sql/tools/sqlpackage-download?view=sql-server-2017>

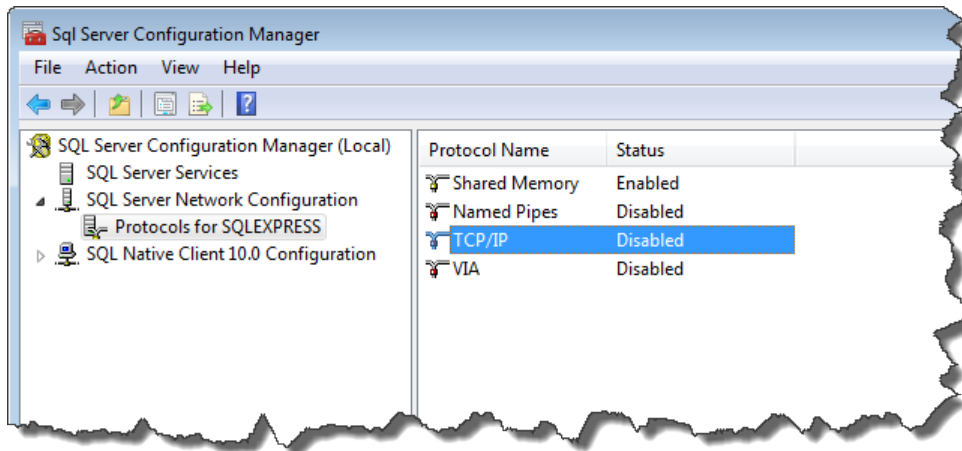
Installation Prerequisite - PowerShell 3.0

You will need to download and install PowerShell 3.0 before installing or updating TSoftPlus.

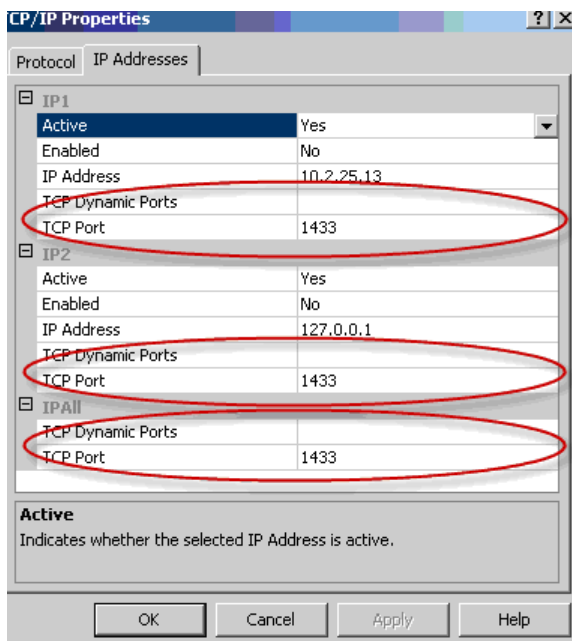
1. Navigate to the Microsoft download and install page for PowerShell 3.0. Using the link below, you will be taken to the page with specific installation instructions for your operating system:
<https://docs.microsoft.com/en-us/skypeforbusiness/set-up-your-computer-for-windows-powershell/download-and-install-windows-powershell-3-0>

Configuring SQL Server

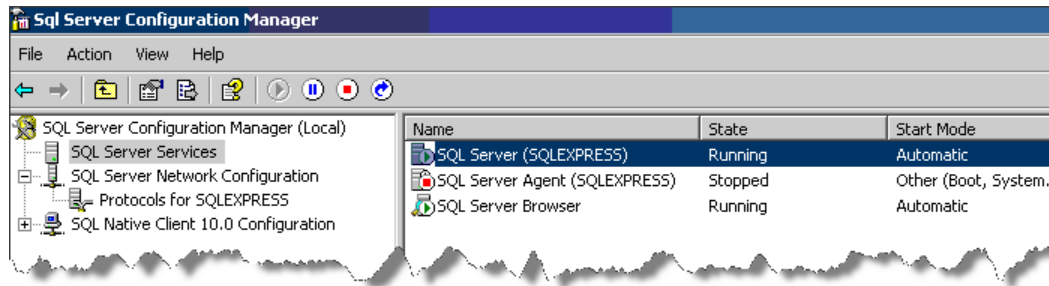
1. Open the SQL Server Configuration Manager.



2. Expand **SQL Server Network Configuration**.
3. Click **Protocols for SQLEXPRESS**.
4. Right-click **TCP/IP** and click **Enable**. The status changes to Enabled.
5. Right-click **TCP/IP** and click **Properties**. The TCP/IP Properties window is displayed.



6. Clear the value for each TCP Dynamic Ports field and enter 1433 for each TCP Port, as shown above.
7. Click **OK** to accept the settings and return to the SQL Server Configuration Manager Window.



8. Click on **SQL Server Services**.
9. Right-click on **SQL Server (SQLEXPRESS)** and click **Restart**.

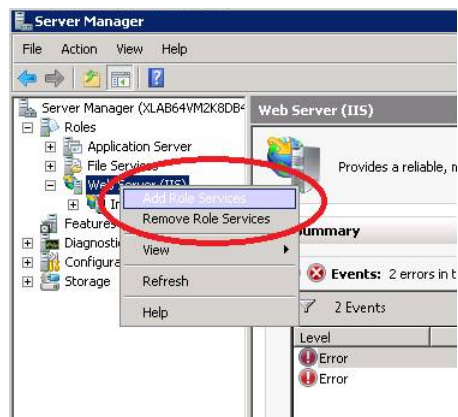
IIS6

In order for TSoftPlus to function properly, you must install IIS 6 on the computer prior to installing TSoftPlus.

Note:

This pertains only to Windows 7 and Windows Server 2008 systems, as they utilize IIS 7 by default.

1. Log on to the Server 2008. The Server Manager window is displayed automatically as you log on.
2. Within the navigation pane, expand the **Roles** node and right-click on **Web Server (IIS)** and click **Add Role Services** from the context menu that appears.



The Add Role Services window is displayed.

3. Scroll down to and expand **Management Tools**.
4. Ensure that all IIS 6 services are selected and click **Install**.

Note:

The above image displays the services after they have been installed.

Add TSoftPlus to your Browser Trusted Sites

For the new Administration single login to work properly you will need to add your TSoftPlus URL to your intranet as a Trusted Site via your browser.

Different techniques will be needed depending on whether you are using Internet Explorer or Chrome to work with TSoftPlus.

Internet Explorer

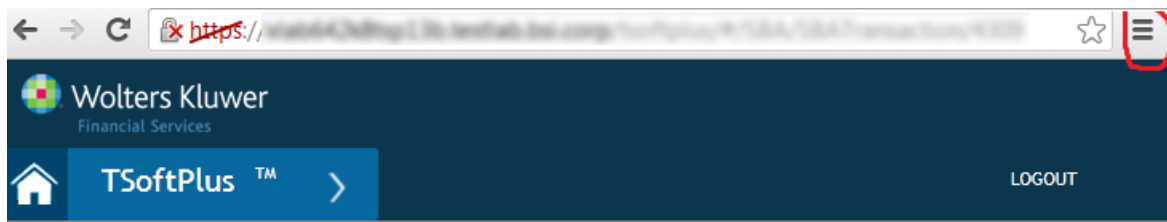
To configure Internet Explorer:

1. Login to TSoftPlus from Internet Explorer.
2. Select the URL from the browser address bar and copy it into the Clipboard.
3. From the browser menu choose Tools, Internet Options, Security tab, Local Intranet.
4. Click **Sites** and **Advanced** and add your TSoftPlus URL to the Local Intranet zone. If the URL is not in the **Add this website in the zone file**, paste it in from the Clipboard.
5. Click **Close** and **OK** until you have returned to your browser window.

Google Chrome

To configure Chrome:

1. Login to TSoftPlus from Google Chrome.
2. Select the URL from the browser address bar and copy it into your Clipboard.
3. For Chrome, click the menu icon, located directly to the right of the browser address bar.



4. In the Privacy section, select **Settings, Show Advanced settings**. Click **Content Settings**.

5. In the Content settings window scroll down to the Pop-ups section, click **Manage exceptions** and paste the address from your Clipboard into the textbox.
6. Click **OK** to save your settings.

Application Installation

Note that there is not a separate installation for a standalone or workstation configuration for TSoftPlus. If you wish to use TSoftPlus in a standalone configuration, select the Complete installation and use the machine as a workstation.

If you are hosting your TSoftPlus databases on a separate server from the application, you must run the database installation on the database server machine first. All other components must then be installed onto the TSoftPlus server after the completion of the database installation.

Note:

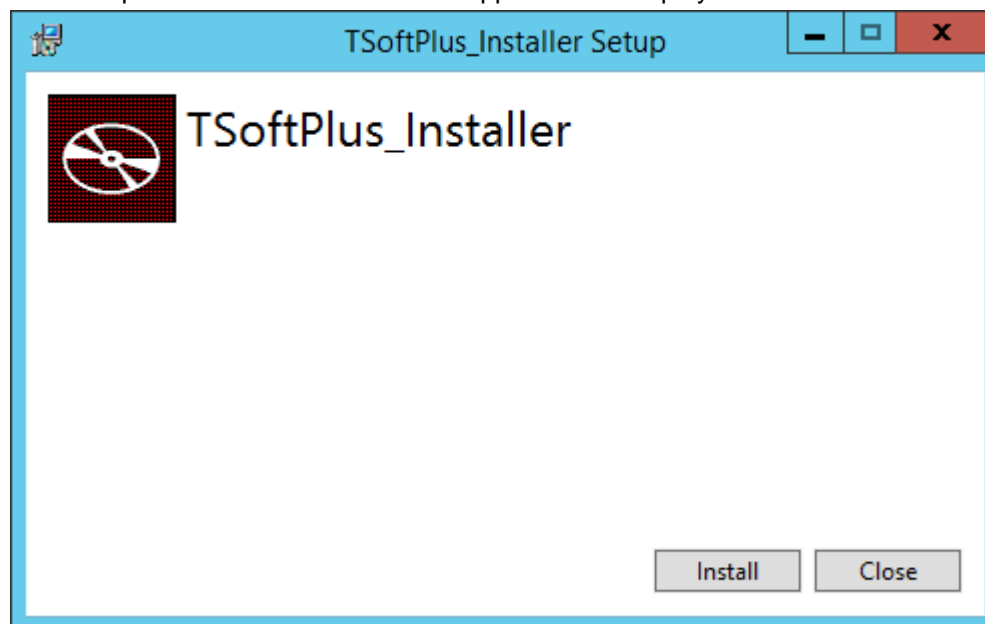
If you have an existing instance of SQL Server, you will need to have TCP/IP enabled on the machine hosting SQL Server for TSoftPlus to work properly.

Installing TSoftPlus

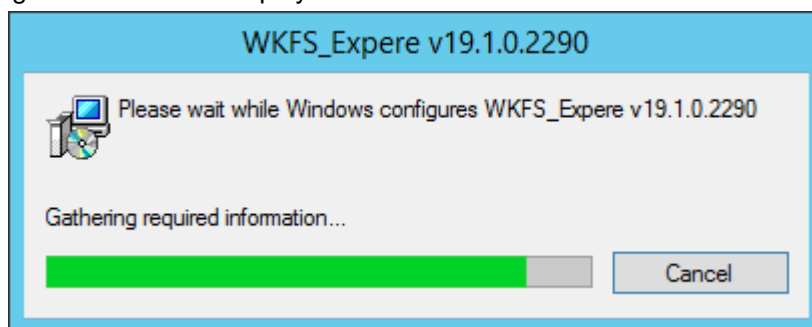
Important:

If updating your version of TSoftPlus: Before attempting to update, ensure you have a current backup of all necessary databases.

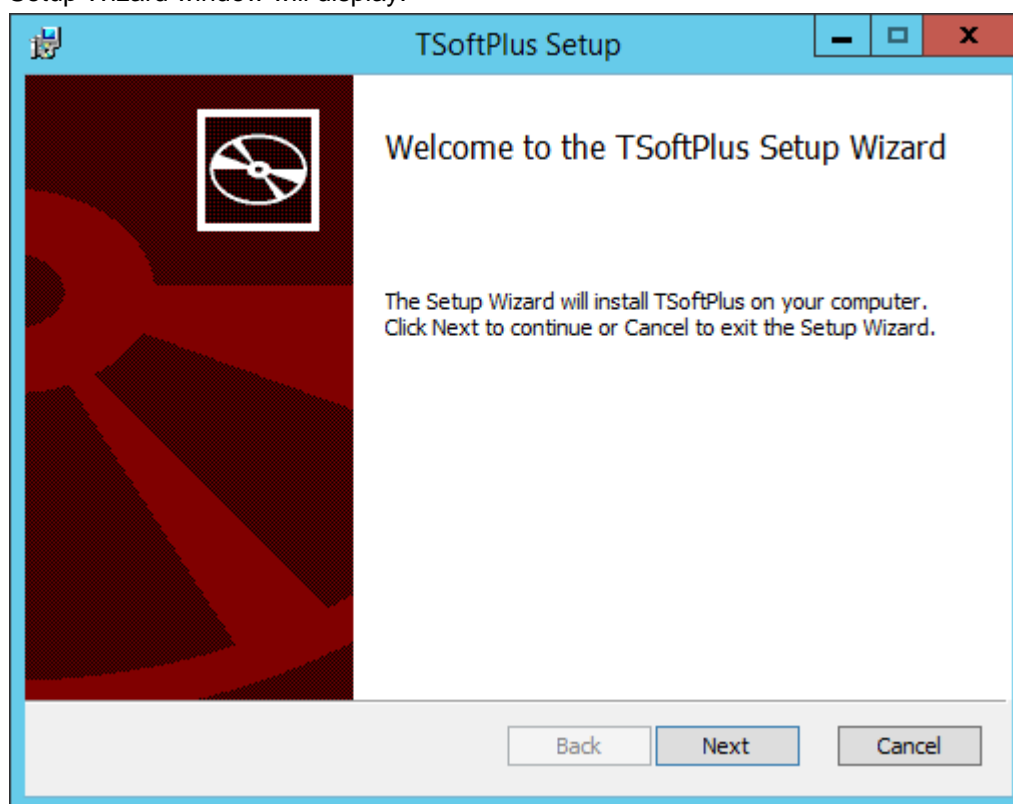
1. Locate and double-click the executable file, **TSoftPlus_Installer.exe** inside the downloaded product ISO. The installation application is displayed. Select **Install**.



2. The progress window will display



3. The Setup Wizard window will display.



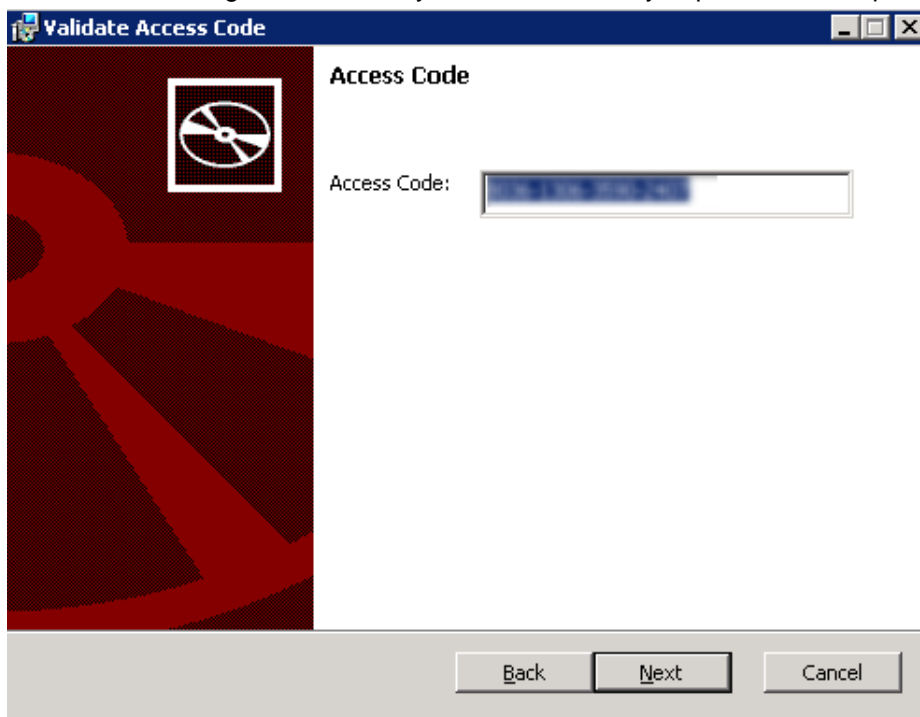
4. Click **Next** to display the SQL Server Properties screen.



Note:

- During a new installation, if the SQL Server is not hosted on the local machine, this must be changed to the name of the machine hosting SQL Server.
- If you have an existing sql instance, enter the server and instance name manually. Failing to provide the name of an existing instance causes an error to be displayed.
- During an Initial or Update installation, the **SQL Server Host, Instance, Port, Integrated security settings** and **Username** (if integrated security is selected) are retained and used for future upgrades.
- **SQL Server Port:** The default value is the standard port used for SQL Server installations. If you have modified the port for your instance, you must indicate that value in this field.
- **Use Integrity Security:** This feature is intended for use when TSoftPlus and the SQL database reside on the same computer.
 - **Selected (default):** Uses the Windows account of the logged in user to connect to SQL Server.
 - **Not Selected:** Allows you to enter the credentials of a specific SQL user account when the SQL database is hosted on a remote machine.

5. Click **Next**. Enter the 16-digit access code you received when you purchased the product.



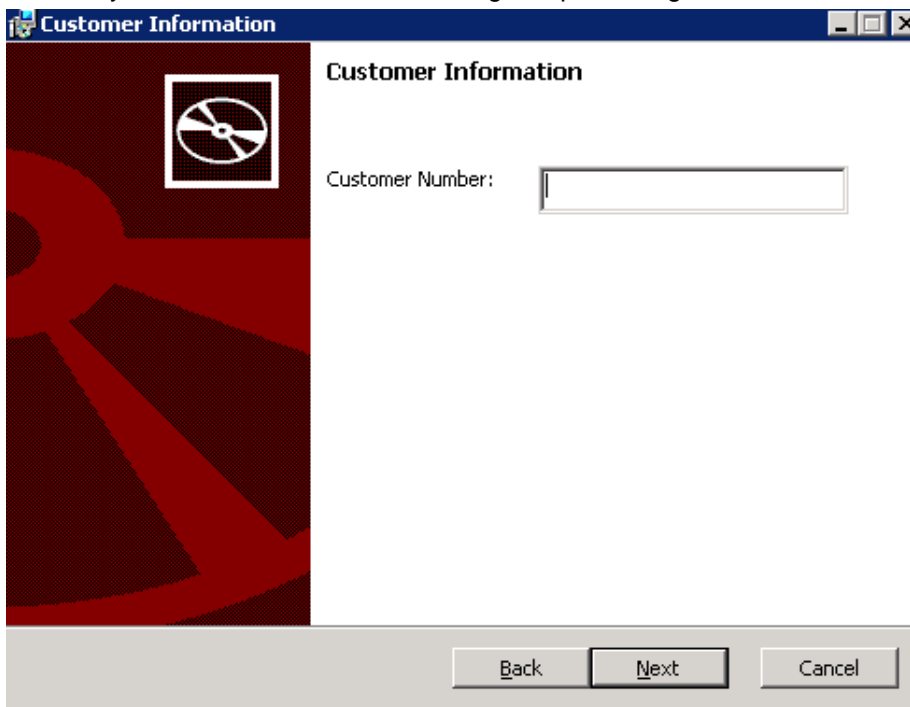
The dialog box is titled "Validate Access Code" and features a dark red background on the left with a white CD icon. The right side is white and contains the text "Access Code" above a text input field. Below the input field are three buttons: "Back", "Next", and "Cancel".

Validate Access Code

Access Code

Access Code:

6. Click **Next**. Enter your customer number for the highest parent organization that is licensed.

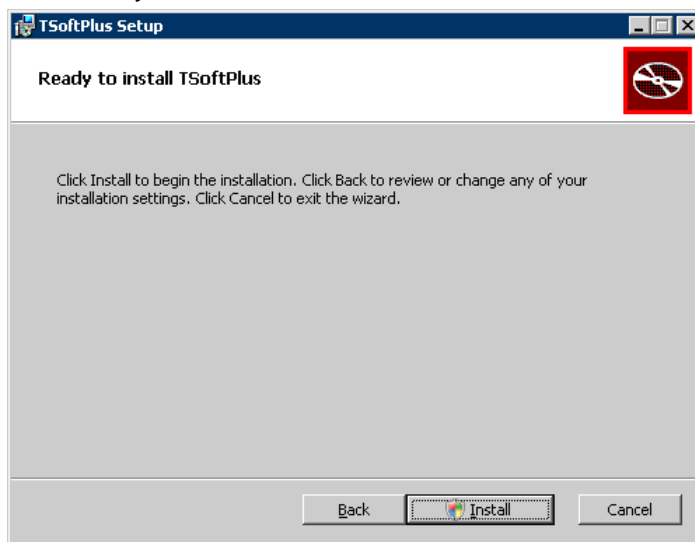


The dialog box is titled "Customer Information" and features a dark red background on the left with a white CD icon. The right side is white and contains the text "Customer Information" above a text input field. Below the input field are three buttons: "Back", "Next", and "Cancel".

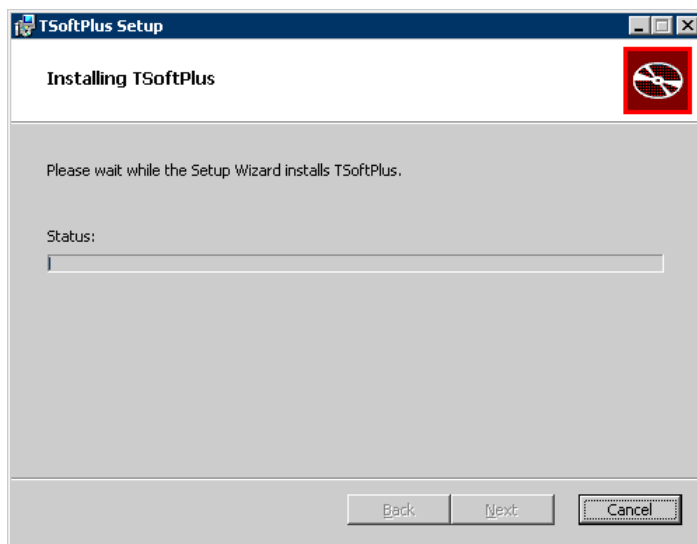
Customer Information

Customer Number:

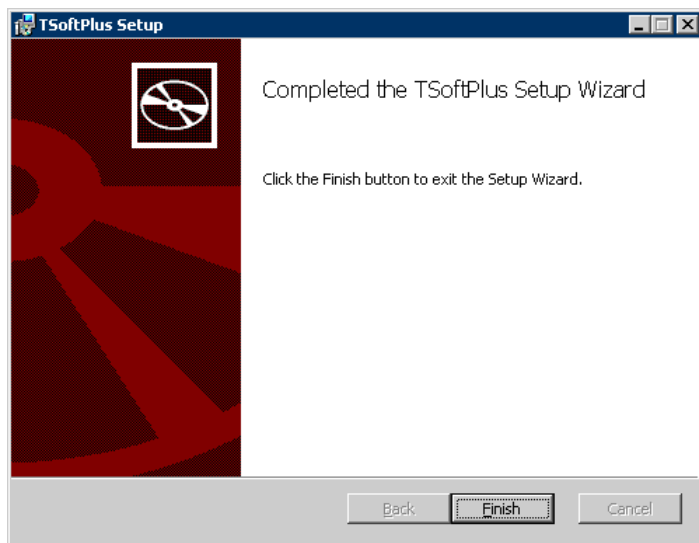
7. Click **Next**. The Ready to Install screen is displayed.



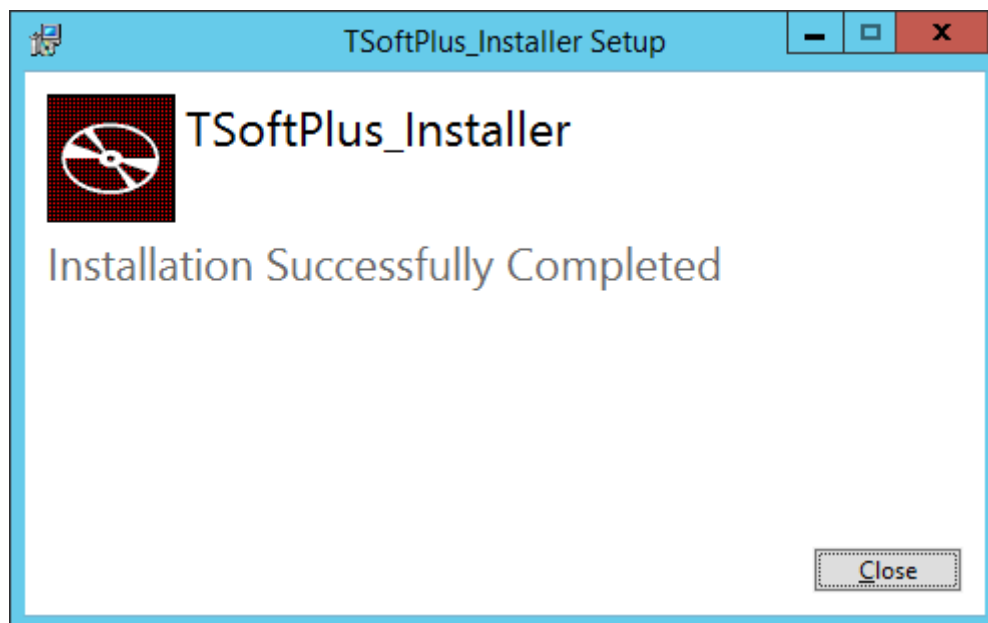
8. Click **Install** to begin the installation process. The Installing screen displays a progress indicator during the installation.



During installation, various command boxes appear to and disappear automatically. When complete, the following screen is displayed.



9. Click **Finish** to close the Setup Wizard application.
10. Click **Close** to close the installation application.



Note:

- When installation is finished, you can access TSoftPlus within the TSoftPlus program group in the Windows Start menu.
- The URL used to access TSoftPlus has changed. Customers with a previous installation will need to utilize the new URL to access the application. TSoftPlus can be accessed from the server it was installed on by going to

Start -->

Programs -->

TSoftPlus -->

TSoftPlus. The new URL is formatted as follows:

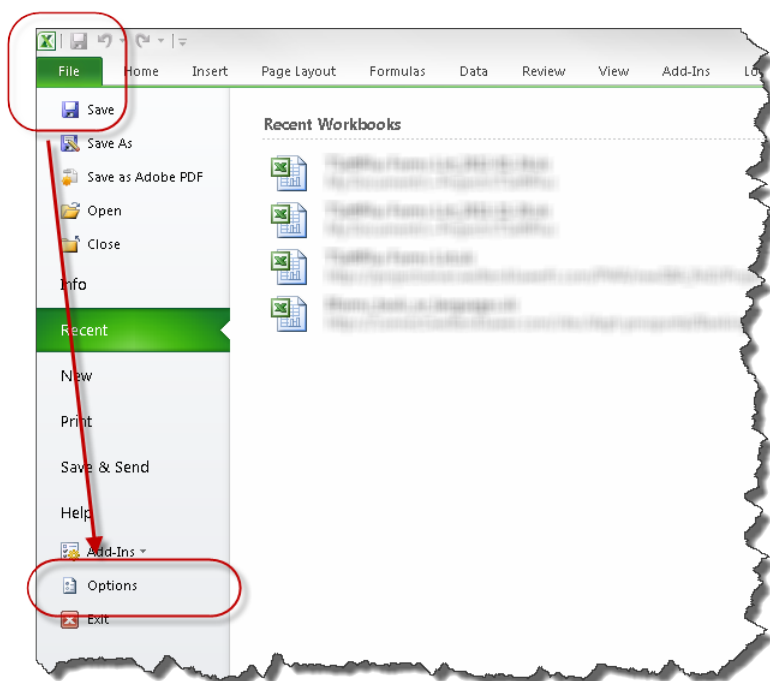
`https://{machinename}/TSoftPlus/`

- A log file is created during the installation process that records all installation activity. The filename is:
`msi*****.log`. The asterisks represent characters that can change across installations (example;
`msic2eos.log`). You can access this log file in the user's TEMP directory. you can locate the TEMP folder as follows:
 1. Click the Windows **Start** button, and click on **Run**.
 2. Within the Run dialog, type
`%temp%` and click **OK**. Windows Explorer is displayed with the current user's temp folder.

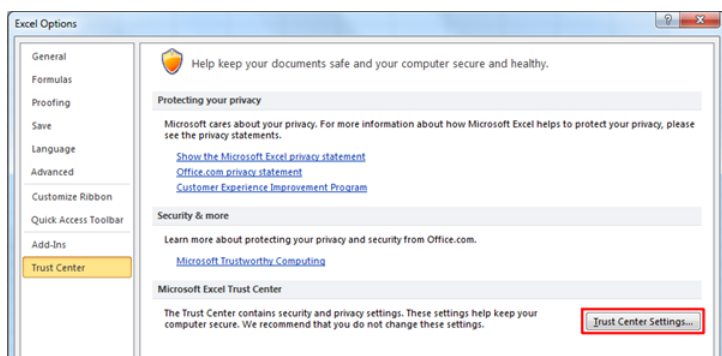
Enabling All Macros in Office 2010

To enable all macros within Excel 2010:

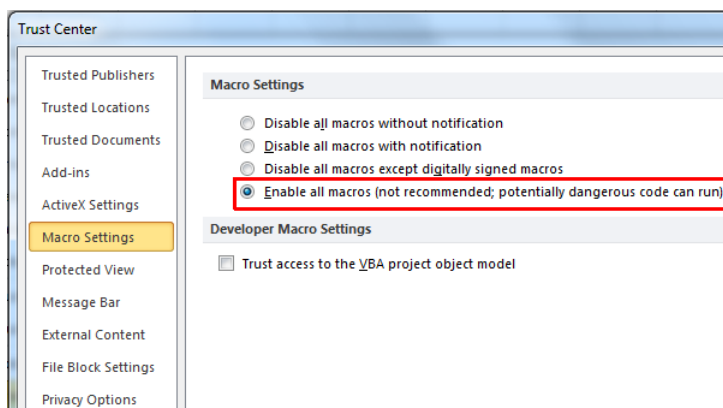
1. Click the **File** tab, and then click **Options**.



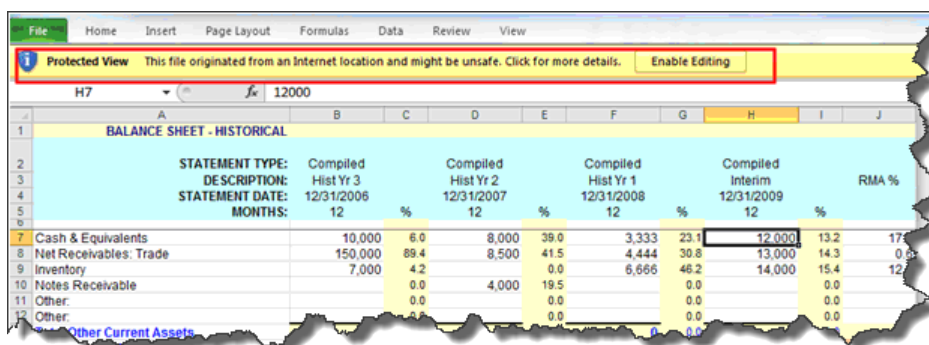
2. Click **Trust Center**, click **Trust Center Settings**, and then click **Macro Settings**.



3. Under **Macro Settings**, click **Enable all macros (not recommended, potentially dangerous code can run)**.

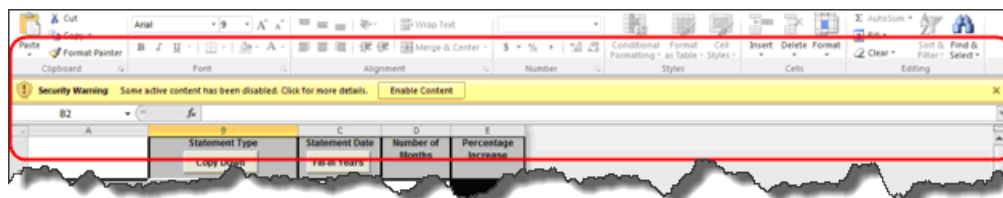


There is a new Trust Center option in Excel 2010 called Protected View. By default, the options are checked which presents a protected view setting when the Financial Analysis template is opened in Excel 2010. You must click on **Enable Editing** button to work with the Excel spreadsheet each time the template is opened.



Note:

If the Macro Setting **Disable all macros with notification** is selected; after clicking **Enable Editing**, the security warning message related to the macro appears.



To avoid the Enable Editing message, the Protected View settings must be modified.

- Within the Trust Center, click **Trust Center Settings....**
- Click **Protected View**.
- Clear the check boxes for **Enable Protected View for files originating from the Internet** and **Enable Protected View for files located in potentially unsafe locations**.

4. Click **OK** to close the Trust Center window.

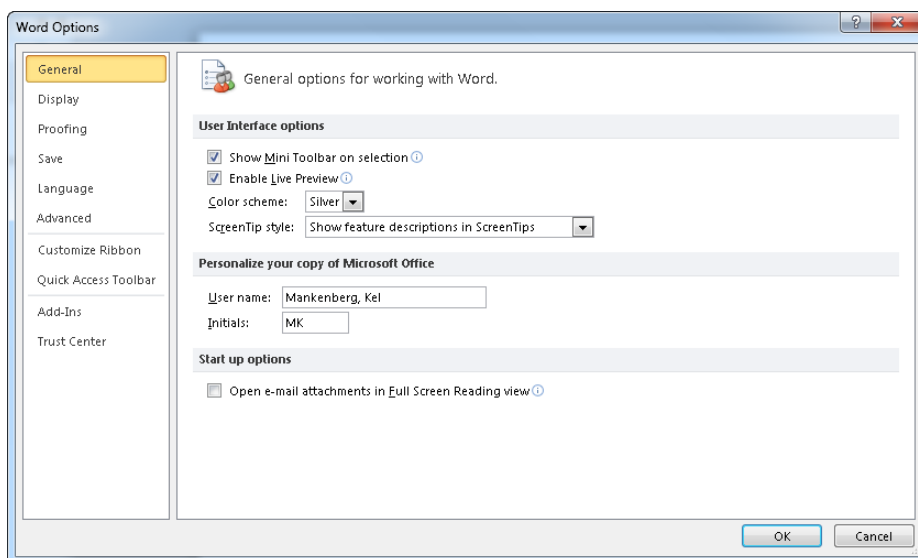
Enabling Editing in Excel and Word 2010

To avoid the Enable Editing message from appearing in Excel and Word 2010, the Protected View settings must be modified. This ensures that when you open the Loan Authorization Wizard, it will appear correctly within Word 2010.

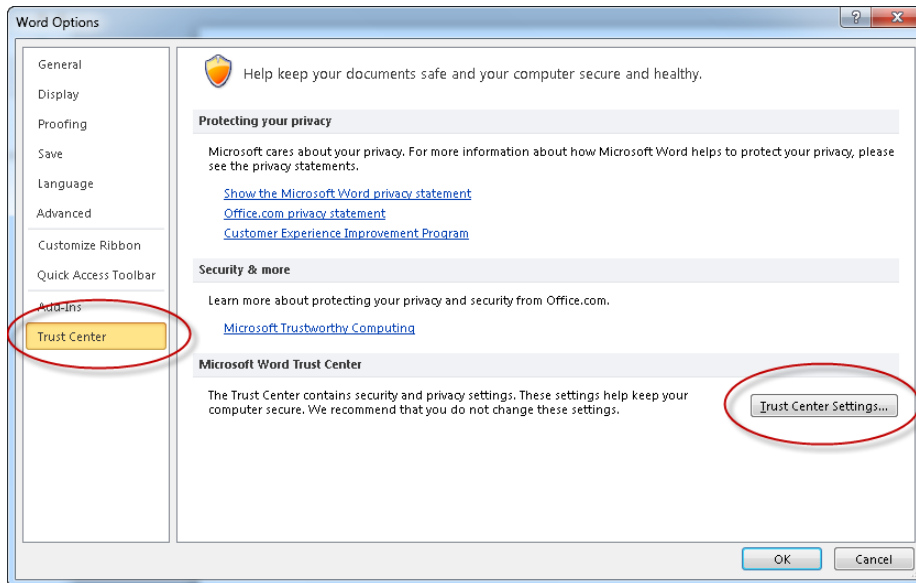
Note:

- You can recognize if editing needs to be enabled if the Loan Authorization page is displayed within Word, but the **Update** link does not appear at the top of the first page.
- **Important:** This procedure must be completed in both Word and Excel for the Loan Authorization and Macro features to work correctly. This procedure shows the Word Options dialog.

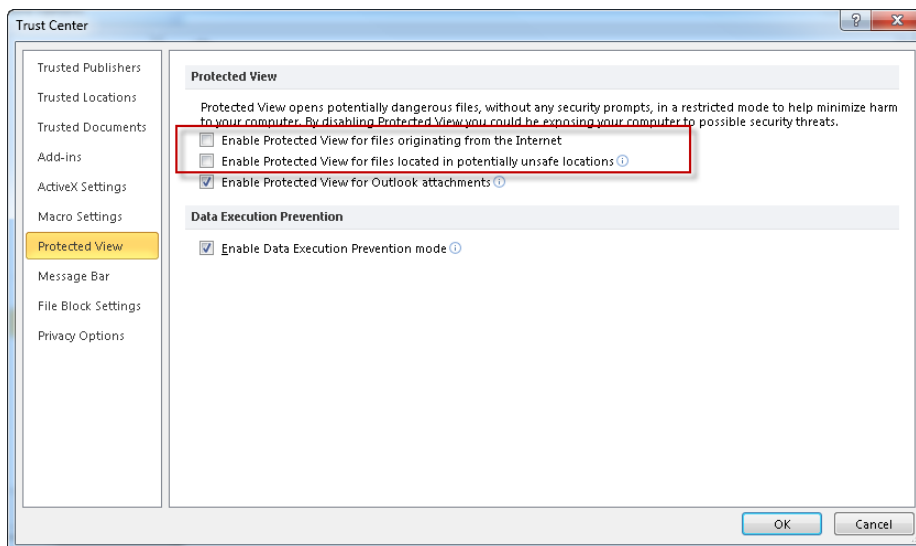
1. From the **File** menu, click **Options**. The options dialog appears.



2. Click **Trust Center**, and then **Trust Center Settings**.



3. Click **Protected View**.



4. Clear the check boxes for **Enable Protected View for files originating from the Internet** and **Enable Protected View for files located in potentially unsafe locations**.
5. Click **OK** to accept the changes.

Support Tools

Three support tools are included on the ISO that can be utilized by customers:

- **Backup.cmd** – this can be used to perform a backup of the TSoftPlus databases.
- **Master Password Reset.cmd** – this script can be used to reset the Admin user password in the event that it has been locked out or forgotten. The script will return the reset password on screen.
- **TSoftPlus Database Rollback Script** - If the product installation fails during the database update portion of the install, it may be necessary to clean up the databases before attempting another install. This script that will clean out a database table and roll back the database has been included with the product. Please contact SupportLine for details on running the script if your product installation fails.

Contact Information

How and When to contact us

Important:

There may be situations where you provide or are asked to provide data to Wolters Kluwer Financial Services for assistance in troubleshooting, implementation, or the delivery of professional services. When doing so, do not provide actual live data of your customers. Provide sample, fake data that is representative of the issue you are experiencing.

If you have any questions regarding this release, you may contact the WKFS support team by phone or e-mail. Support staff is available Monday through Friday, 7 A.M. to 7 P.M. CST. Voice mail is available after hours and on weekends.

You can visit us on the Internet at www.wolterskluwerfs.com.

Visit our Software Support web site for additional supporting documentation, downloads, frequently asked questions, training, or support information: <http://www.WoltersKluwerFS.com/Support>; you can contact us directly through our website at: <http://www.wolterskluwerfs.com/software/contact-us/>.

Visit our Software Support web site for documentation, downloads, frequently asked questions, training, or support information: <http://www.wolterskluwerfs.com/software/tsoftplus-support.aspx>; you can contact us directly through our website at: <http://www.wolterskluwerfs.com/software/contact-us/>.

- Customer Support Line: 1.800.726.9898, option 1
- Customer Support E-mail: MtgDocPrepSupport@WoltersKluwer.com

You can telephone our SupportLine technicians at **800-274-2711**, ext. **1124028**

Banking customers can contact SupportLine at **800-529-1582**, select option 2; our insurance customers can contact SupportLine at **800-382-2424**, select option 2.

Our support staff is available Monday through Friday, 7 A.M. to 7 P.M. CST. Voice mail operates continually, allowing you to leave us a message after hours and on weekends. To help us handle your question as quickly as possible, have these items available before you call:

- product name
- customer number and customer name
- operating system and version number; service pack numbers, if

To ~~contact~~ us through email, submit all requests to: tsoftsup@wolterskluwer.com

To contact us through email, submit all requests to: E-Signsupport@wolterskluwer.com .

Send us a fax at (320) 240-4252.

- Expere Support:
 - Tel: 1-800-274-2711, ext. 1126618
 - E-mail: ExpereIESupport@wolterskluwer.com

Ordering and Billing Support - DocOne Default Servicing

- **Phone:** 800-552-9410 Ext. 1123011
- **Email:** customersupportdoconebanking@wolterskluwer.com

Ordering and Billing Support

Print and Mail Fulfillment Support: Fulfillment Manager

Phone: 800-552-9410 Ext. 1123651

Email: customersupport@wolterskluwer.com

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Wolters Kluwer Financial Services

6815 Saukview Drive
St Cloud, MN, 56303
Toll-free: 800.274.2711

To learn more visit **WoltersKluwerFS.com**.

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