

# **Installation Instructions - Network - Small Implementation**

June 2011

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# Introduction

## Overview

Updates to ARTA Deposit, incorporating new features and capabilities, are regularly introduced as part of our continuing service. We strongly recommend that you install all updates immediately to make sure that your program is operating with the most current features.

Customers currently operating any previous version of ARTA Deposit should install and upgrade to Version 2011.1. If you plan to update to Version 2011.1, verify you are operating Version 2010.2 successfully first. If you have errors while running the previous version, please resolve them by contacting SupportLine before you update to Version 2011.1.

We urge you to review the system requirements list and installation prerequisites to ensure you have the required hardware and software before installing any version of the ARTA Deposit Documentation System. This is especially true for Version 2011.1 as there are changes to the prerequisites and subsequent changes to the installation.

It is very important that you read these installation instructions carefully before and during the installation process. A successful installation depends on these instructions being followed as closely as possible.

**IMPORTANT NOTICE:** Review the [Hardware Requirements](#) and [Installation Prerequisites](#) in this guide to ensure proper installation and operation of ARTA Deposit Version 2011.1.

## Software License

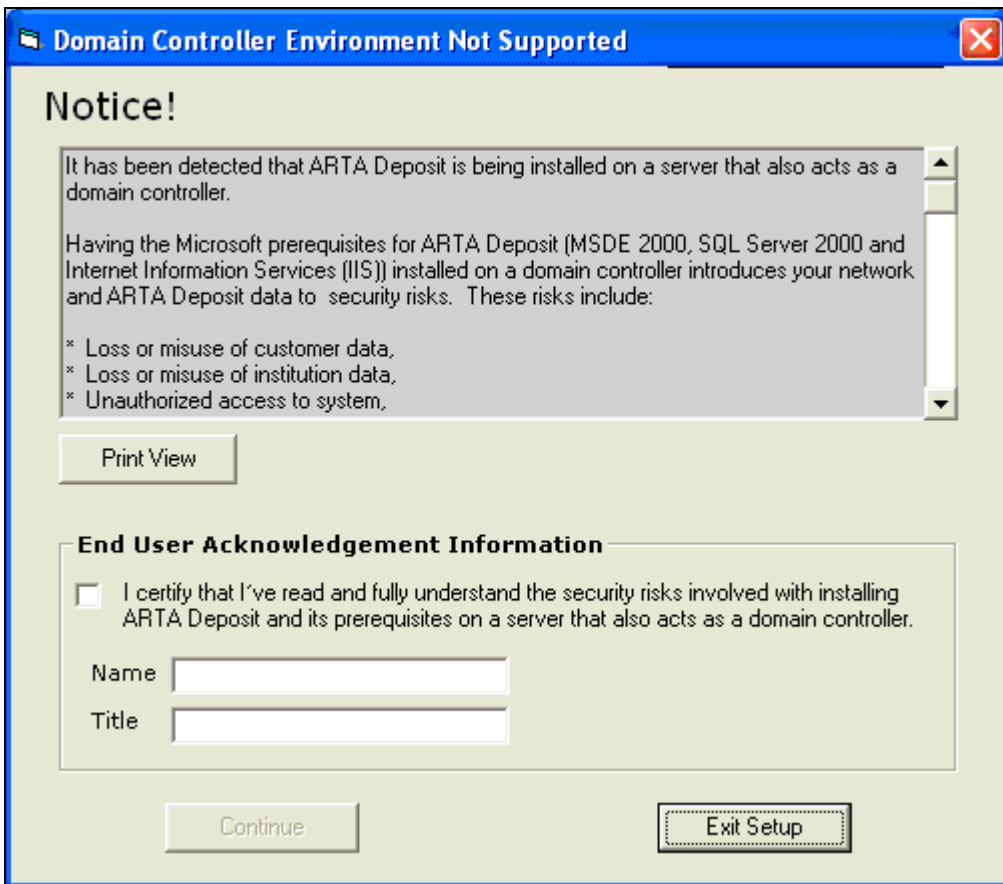
Read your Software Enterprise License Agreement or your Software Single-Seat License Agreement to understand the legal restrictions governing copying and installation.

# Technology News

## Installation on a Domain Controller

With best security practices in mind, Wolters Kluwer Financial Services no longer supports ARTA Deposit and its pre-requisites (SQL Express or SQL Server and Internet Information Services) installed on a computer that also acts as a domain controller. Having SQL Express, SQL Server 2000, SQL Server 2005, SQL Server 2008 and/or IIS installed on a domain controller introduces additional security risks to your network and ARTA Deposit data. In order to properly reduce the risks in these environments, advanced configuration settings may be necessary that are above and beyond the scope of your Wolters Kluwer Financial Services, Inc. standard support contract. Because of these security risks, Microsoft also advises against installing SQL and/or IIS on a domain controller.

As previously indicated, with Version 5.1 (and subsequent versions) the installation of ARTA Deposit on a domain controller requires a click-through agreement where the financial institution acknowledges the acceptance of the noted security risks in order for the ARTA Deposit installation to complete. The screen below will display during the installation setup. Begin by clicking the **Print View** button to read the entire notice.



The warning message reads:

It has been detected that ARTA Deposit is being installed on a server that also acts as a domain controller.

Having the Microsoft prerequisites for ARTA Deposit (SQL Express, SQL Server 2000, SQL Server 2005, SQL Server 2008, and Internet Information Services (IIS)) installed on a domain controller introduces your network and ARTA Deposit data to security risks. These risks include:

- Loss or misuse of customer data,
- Loss or misuse of institution data,
- Unauthorized access to system,
- Adverse regulatory examination reports, or other regulatory actions.

Because both Microsoft and Wolters Kluwer Financial Services recommend against installing these Microsoft prerequisites on a domain controller, **Wolters Kluwer Financial Services will no longer support this type of installation.** In order to properly reduce the risks in these environments, advanced configuration settings may be necessary that are above and beyond the scope of your Wolters Kluwer Financial Services standard support contract. Wolters Kluwer Financial Services, Inc. will continue to provide product support for ARTA Deposit but will no longer be able to field server related questions if your financial institution chooses to install ARTA Deposit on a domain controller.

By checking the box below and proceeding with installation on a domain controller, your financial institution agrees to assume all risks related to the installation and agrees to indemnify Wolters Kluwer Financial Services, Inc. for any claims arising from the installation. You must have authority to accept this Acknowledgement on behalf of your financial institution or company. (If you do not have authority to accept the terms and conditions of the Acknowledgement or do not understand or agree with all the terms and conditions, you must click **Exit Setup** and you will not be able to proceed with setup of this product).

Please contact the SupportLine at 1-800-274-2711, Ext. 124039 with any questions regarding this Acknowledgement.

This notice will display only on initial installations. Read the notice, then select the check box to acknowledge the warnings, and type the required fields of information to proceed with installation on a domain controller. Once this notice has been read and accepted, future updates will not display the notice again.

## Database File Name

Each version of ARTA Deposit will have a different file name for the database. The database file name for this version of ARTA Deposit is:

**ARTADeposit11\_1**

## Latest Service Packs

Version 2011.1 requires the latest service pack for all ARTA Deposit components and operating systems. These service packs as well as the minimum service packs that are required include:

Components/ Operating Systems	Minimum Required
MDAC 2.6	Service Pack 1*
SQL Server 2000	Service Pack 4
SQL Server 2005	Service Pack 3
SQL Server 2008	N/A
SQL Express 2008 (64-bit only)	Service Pack 2
Windows XP Pro	Service Pack 3
Windows Server 2003	Service Pack 2
Windows Vista	Service Pack 1
Windows Server 2008 (32 bit)	Service Pack 1
Windows 7 Pro (32 bit and 64 bit)	
Windows Server 2008 R2 (64 bit)	

\* This service pack is included on the ARTA Deposit CD-ROM.

Service packs can be downloaded from the Microsoft web site ([www.microsoft.com](http://www.microsoft.com)) or contact Microsoft Corporation to order.

## Server Information: Network - Small Implementation

- You must know the name of the computer you are installing on.
- Multiple domains are not supported in ARTA Deposit. This means all components of ARTA Deposit must be in the same domain.
- Clients should use Microsoft Client for NetWare Networks to communicate with a Novell server. Errors may occur when using Novell NetWare Client.

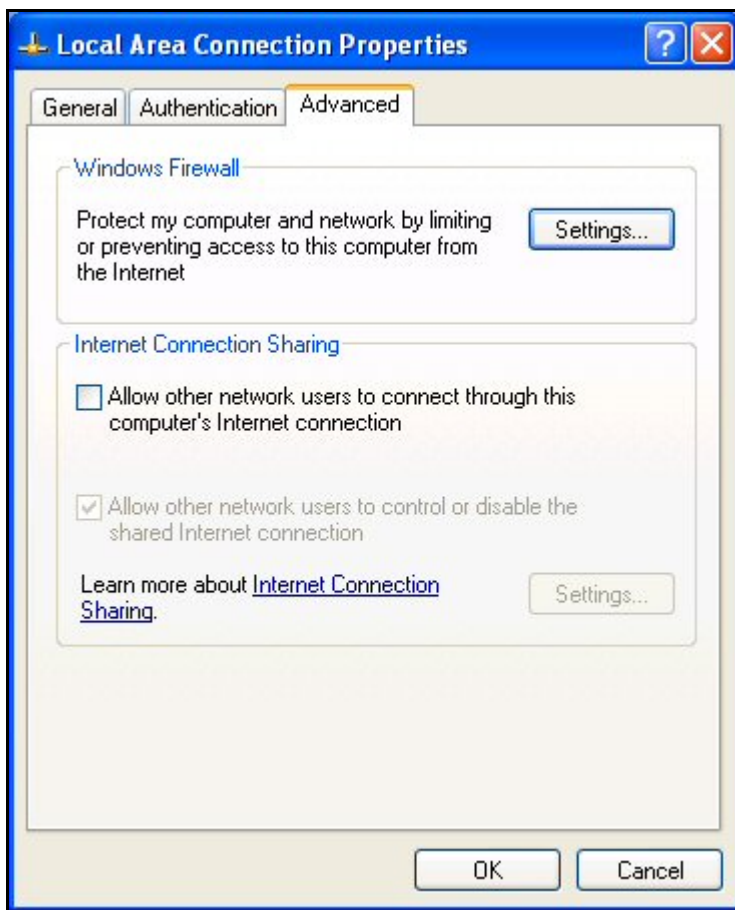
## Operating Systems Notes

### Vista/Windows Server 2008/Windows XP Service Pack 2/Windows 7/Windows 2003 Service Pack 2

The Windows firewall will default to active and the HTTP/Port 80 will be disabled for Vista and Windows XP operating systems with Service Pack 2 or Windows 2003 with Service Pack 1. This will thereby prevent ARTA Deposit from acting as a small network server. Perform the following steps to enable ARTA Deposit proper server functionality:

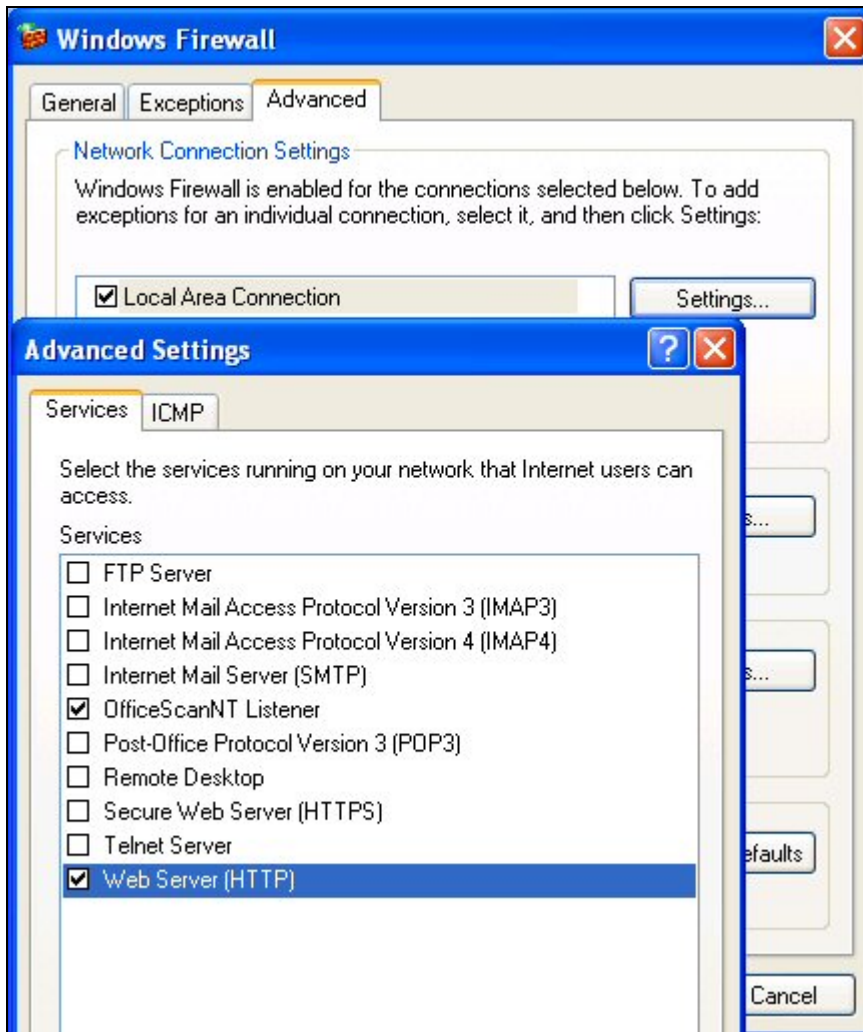
#### If using the Windows Classic view

1. Select **Start**, **Settings**, and **Network Connections**.
2. Right click **Local Area Connection** and select **Properties**.
3. Select the **Advanced** tab.
4. Click the **Settings** button in the *Windows Firewall* frame.



5. Select the **Advanced** tab on the **Windows Firewall** window.

6. Click the **Settings** button in the *Network Connection Settings* frame.
7. Select the **Web Server (HTTP)** check box to turn on this option.

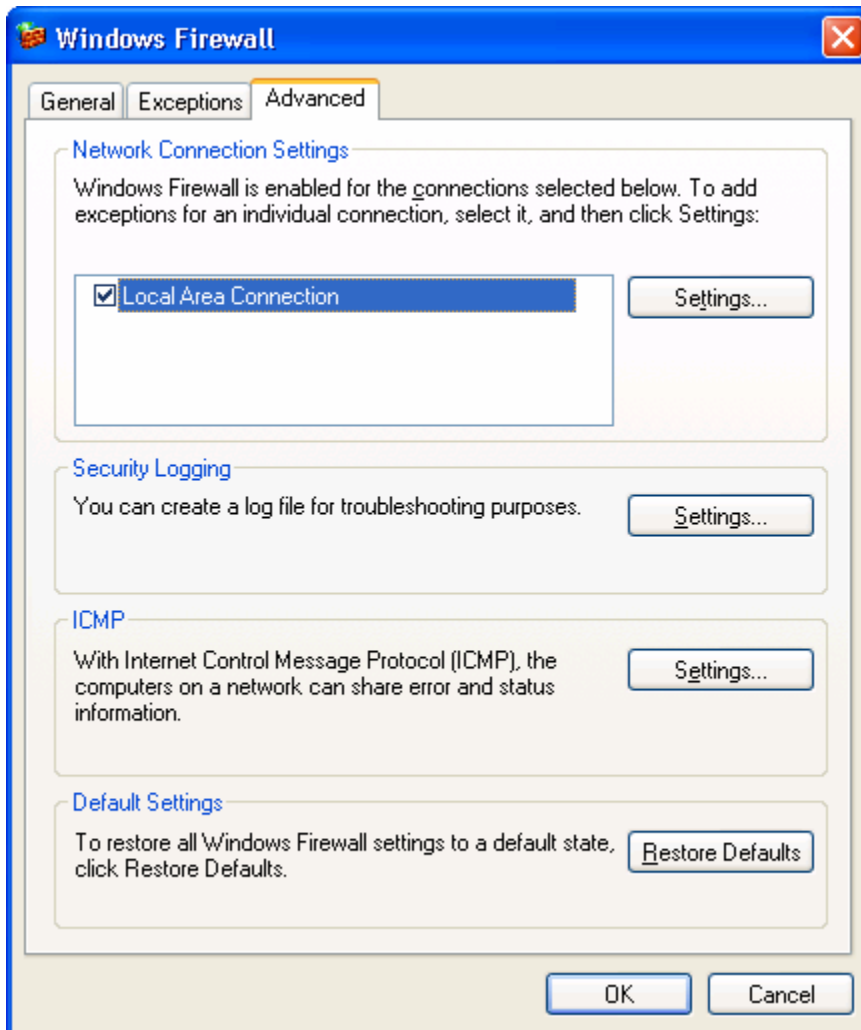


8. Click **OK** to close the *Advanced Settings*, *Windows Firewall*, and *Local Area Connection Properties* windows.

### If using Windows XP view

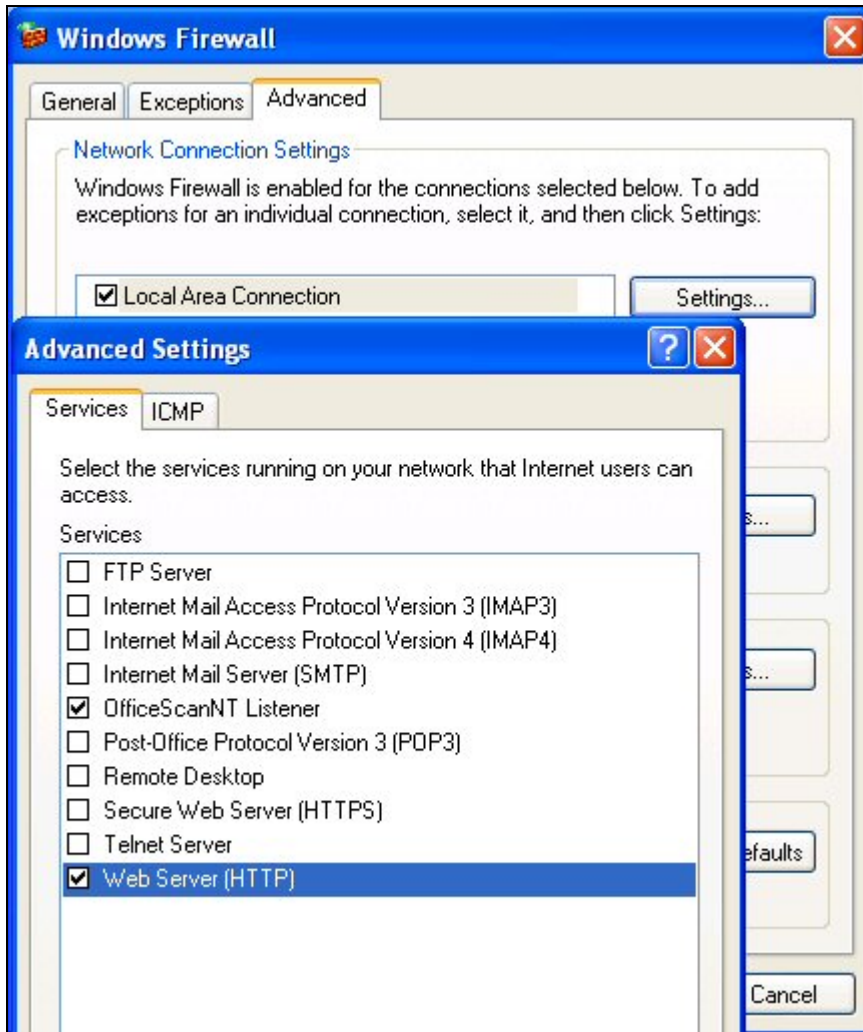
1. Select **Start**, **Control Panel**, and **Network and Internet Connections**.
2. Click the **Windows Firewall** icon.
3. Select the **Advanced** tab.

4. Click the **Settings** button in the *Windows Firewall* frame.



5. Click the **Settings** button in the **Network Connection Settings** frame.

6. Select the **Web Server (HTTP)** check box to turn on this option.



7. Click **OK** to close the *Advanced Settings*, *Windows Firewall*, and *Local Area Connection Properties* windows.

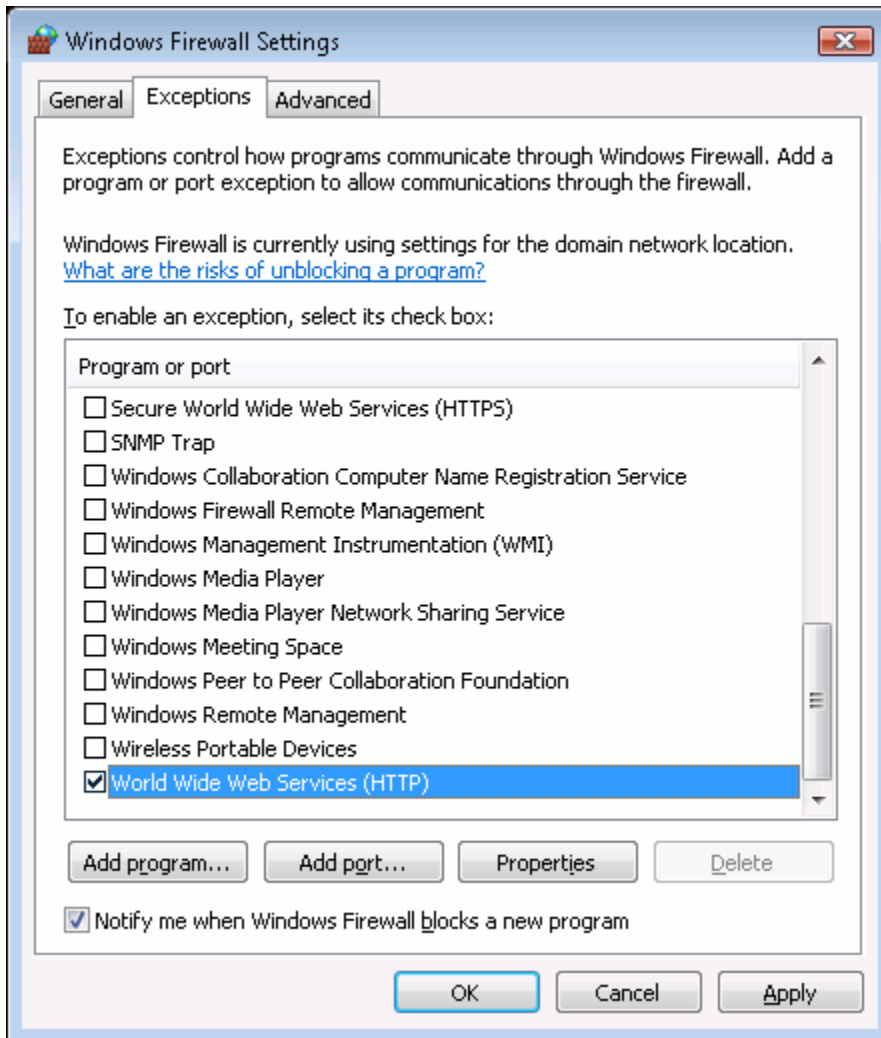
### If using Windows Server 2008 R2/Windows 7

1. Select Start, Control Panel, System & security
2. Select Windows Firewall
3. Click Advance Settings
4. Click inbound Rules on the left side
5. Locate World Wide web Services (HTTP)
6. If not enabled, select Enable Rule from the Right side column.

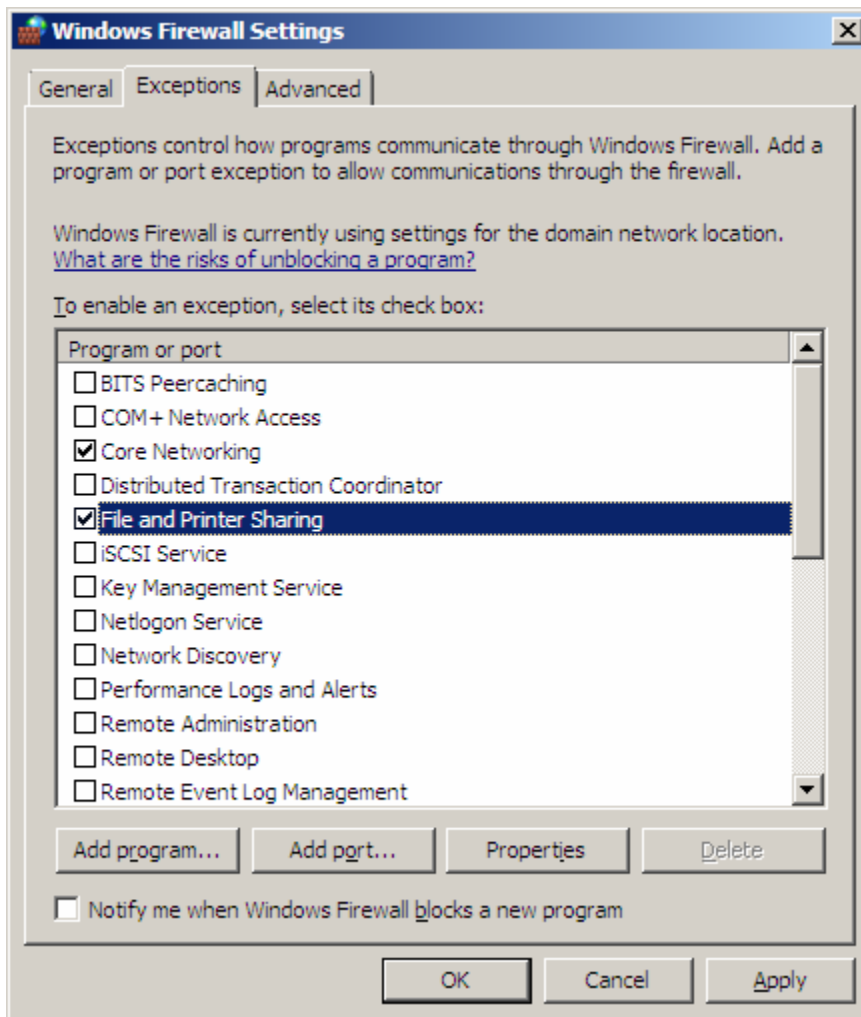
### If using Windows Server 2008/Vista

1. Select **Start, Control Panel**.
2. Click the **Windows Firewall** icon.
3. Click on **Change Settings**.
4. Click on **Continue**.
5. Select the **Exceptions** tab.

6. Select the **World Wide Web Services (HTTP)** check box to turn on this option.



7. Select the **File and Printer Sharing** check box to turn on this option.



## Not Supported

### Windows Vista

The following editions of Vista are not supported operating systems for use with any Wolters Kluwer Financial Services software program.

- Windows Vista Ultimate
- Windows Home Premium
- Home Basic
- Windows Vista Starter

### Windows 95/Windows 98/Windows 2000/Windows 2000 Server/Windows NT Workstation/Windows NT Server

Windows 95, Windows 98, Windows 2000, Windows 2000 Server, Windows NT Workstation, and Windows NT Server have been retired by Microsoft. Therefore Wolters Kluwer Financial Services does not support ARTA Deposit with these operating systems. If you attempt to install ARTA Deposit on a workstation with either of these operating systems, you will receive a warning message.

### Windows 7 Home Edition

Wolters Kluwer Financial Services does not support ARTA Deposit with Windows 7 Home operating system.

### Windows Me

Windows Me (Millennium Edition) was developed for home computer use only, and is not a supported operating system for use with any Wolters Kluwer Financial Services software program.

### Windows XP Home Edition

Windows XP Home Edition was developed for home computer use only, and is not a supported operating system for use with any Wolters Kluwer Financial Services software program.

### Microsoft Small Business Server

Microsoft Small Business Server and Microsoft BackOffice are designed for small business applications only, and are neither supported operating systems for use with any Wolters Kluwer Financial Services software program nor with any ARTA Deposit component.

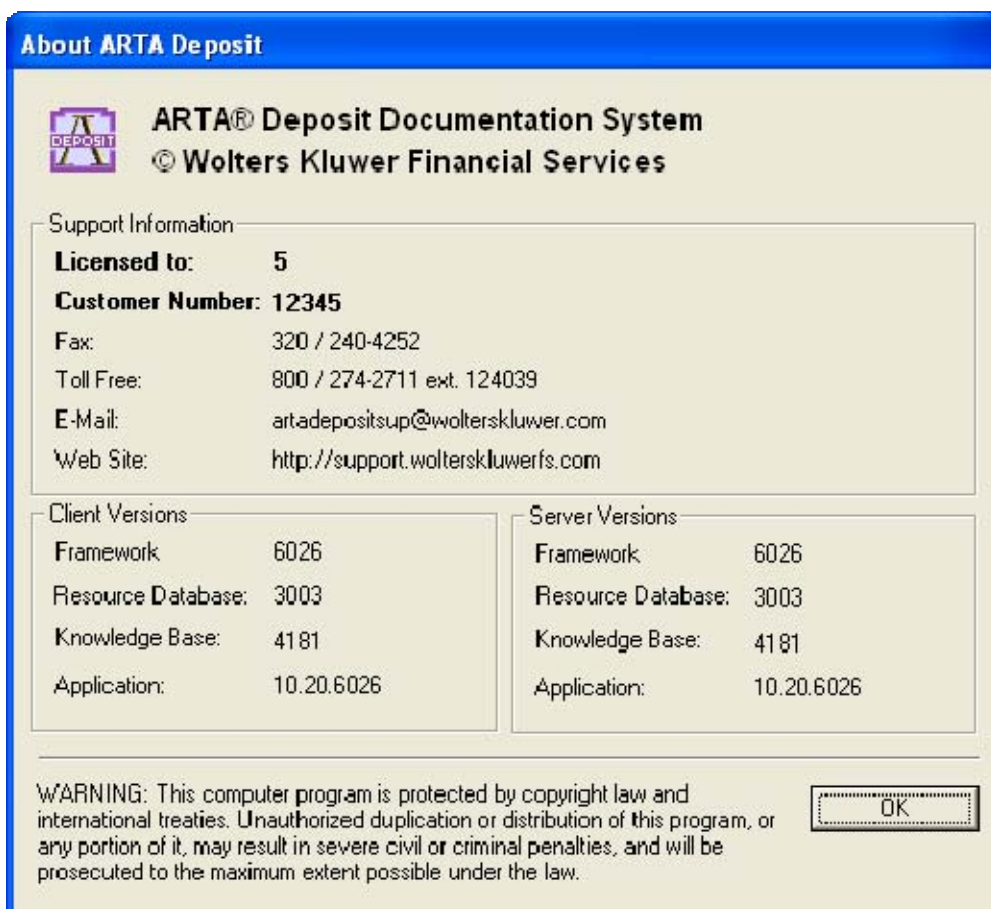
### Microsoft SQL Server Desktop Engine 2000/Microsoft SQL Server 7.0

MSDE 2000 and Microsoft SQL Server 7.0 is not supported for use with any Wolters Kluwer Financial Services software program nor with any ARTA Deposit component.

# Getting Started - Updates

## If you are a current ARTA Deposit 2010.2 user

Verify you are operating ARTA Deposit Version 2010.2. To determine which version of ARTA Deposit is currently running, open ARTA Deposit. Click **Help** in the ARTA Deposit toolbar then click **About ARTA....** The version number is the **Application** number. Refer to the *Client Versions* frame for client workstations; refer to the *Server Versions* frame for stand-alone and server computers.



The installation process converts your data from the previous version (2010.2) to the current version (2011.1) of ARTA Deposit.

## To upgrade to ARTA Deposit Version 2011.1 and change your configuration

It is possible to change configurations. You **MUST** read the instructions carefully and plan your installation time accordingly. Detailed instructions for each of these steps are found in the installation instructions for your configurations.

1. Install ARTA Deposit Version 2011.1 for the configuration on which you currently run ARTA Deposit Version 2010.2. The installation process converts your data from the previous version (2010.2) to the current version (2011.1) of ARTA Deposit.
2. Perform a backup of your data.
3. Uninstall the previous version of ARTA Deposit.
4. Review the system requirements and prerequisites for the new configuration on which you plan to run ARTA Deposit Version 2011.1. **This step is very important, especially if you are moving from a network - small implementation to a network - large implementation configuration.**
5. Perform the installation of ARTA Deposit Version 2011.1 for the new configuration.
6. Restore your data to the new configuration.

## Configuration Selection during the installation...

If you currently run ARTA Deposit Version 2010.2, the ARTA Deposit Version 2011.1 setup program will detect your current (Version 2010.2) configuration and automatically select that for the installation of Version 2011.1. Therefore, you will not see the *Installation Type* screen at the beginning of the installation. Instead you will proceed automatically to the *Welcome* screen. The installation process converts your data from the previous version (2010.2) to the current version (2011.1) of ARTA Deposit.

## After Installation, Save the Main Institution

After you have completed the installation process for Version 2011.1, it is recommended that you open and save your main institution (in the institution setup area) before accessing APY Checker.

### To Save the Main Institution

1. Choose **Setup** then **Institution** from the navigation menus.
2. Select **Main Institution** and click **Next**.
3. Select the name of the main institution and click **Edit**.
4. No changes are necessary within institution setup. Click **Validation/Exit** on the navigation menu, then click **Exit** when the *Validation* screen appears.
5. Click **Yes** to save the main institution.

# Getting Started

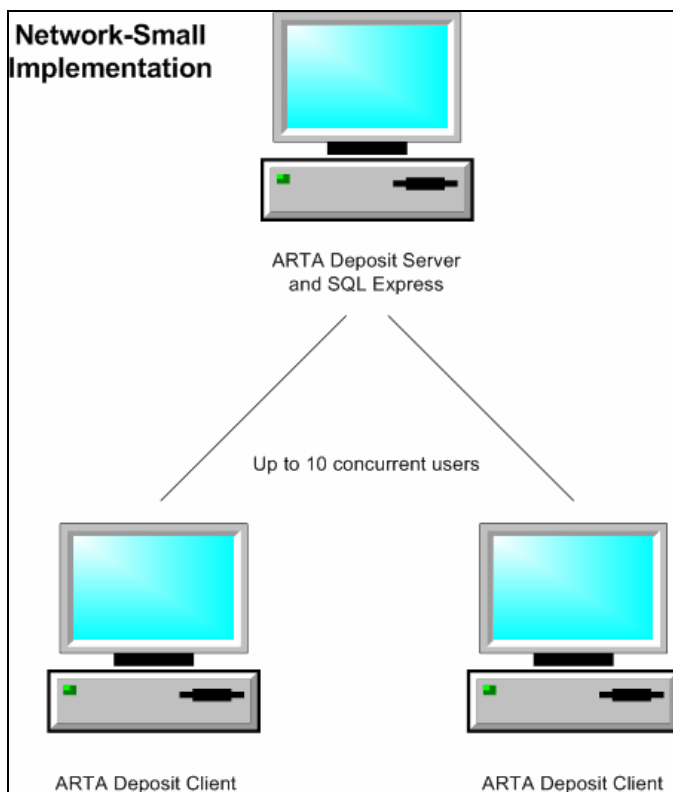
## Know Your Configuration

Select Network - Small Implementation Server to install a network - small implementation of ARTA Deposit on a Windows 2003 Server or Windows 2008 Server. ARTA Deposit can be installed on a workstation computer running Windows XP Professional, or Windows Vista in a workgroup configuration, where it acts as the server for ARTA Deposit clients.

- ARTA Deposit cannot be installed on a Novell NetWare server because the required IIS component cannot be installed to or run from a Novell NetWare server.
- Microsoft and Wolters Kluwer Financial Services do not recommend installing on a domain controller server. Performance and security may be affected.

Review the System Requirements and Prerequisites before proceeding to the Network - Small Implementation Server Installation section.

**NOTE:** The client installations must be performed after the server installation.



## Checklist

- Confirm your configuration. Refer to the other installation instruction documents on the ARTA Deposit CD-ROM for other configuration options.
- Review the system requirements noted in this document. Make sure you have the appropriate hardware and operating system to run ARTA Deposit.
- Review the prerequisites listed. The setup program will verify and assist with the installation of these (except TCP/IP and SQL Server) as needed.
- Proceed to the server installation instructions then complete the client installation.

**NOTE:** After the setup program is complete, review the [Next Steps](#) section and complete any appropriate permissions settings based on your operating system and configuration.

## System Requirements

For system and printer requirements, see [Appendix A: Software and Hardware Requirements](#).

# Installation Prerequisites

Refer to the table below to determine all required prerequisites for your implementation option. The setup program searches and verifies the presence or absence of the software prerequisites (except TCP/IP and SQL Server). If you are missing one, the setup program provides information or a link to help you acquire the prerequisite.

This section provides a summary table and details for Internet Information Services (IIS) settings for Windows Vista, checking TCP/IP, and configuring Internet Explorer 6.0 settings. More information for each prerequisite can be found in Appendix A, *Troubleshooting*.

**Acquiring and installing these prerequisites is the responsibility of your network administrator or technical consultant.** Wolters Kluwer Financial Services, Inc. provides assistance with implementing these prerequisites for a minimal fee. Or you may contact Microsoft Support for assistance, if needed.

Installation Prerequisites	TCP/IP	Internet Explorer	IIS	SQL Express (1-5 users; up to 10 users on server)
Windows XP Professional	●	●	●	●
Windows Server 2003	●	●	●	●
Windows Vista	●	●	●	●
Windows Server 2008	●	●	●	●
Windows 7 Professional	●	●	●	●
Windows Server 2008 R2	●	●	●	●

## Configuration of IIS for New Installations

If you are installing ARTA Deposit for the first time on supported Windows Vista, Windows 7 and Windows 2008 Server operating systems, you can perform the necessary configuration of the Internet Information Server, Version 7.X from the command prompt. This will automatically perform the IIS configurations documented in the next sections of this document.

1. Navigate to the COM folder of your ARTA Deposit product CD.
2. Right-click **iis7ard.cmd** and choose **Run as Administrator**.

3. This will run a series of IIS configuration commands in a command window which will close when it is complete.

**Note:** If you are upgrading an existing ARTA Deposit installation, do not use this configuration file. Your installation was configured the first time ARTA Deposit was installed and those settings will be retained during the update to this release.

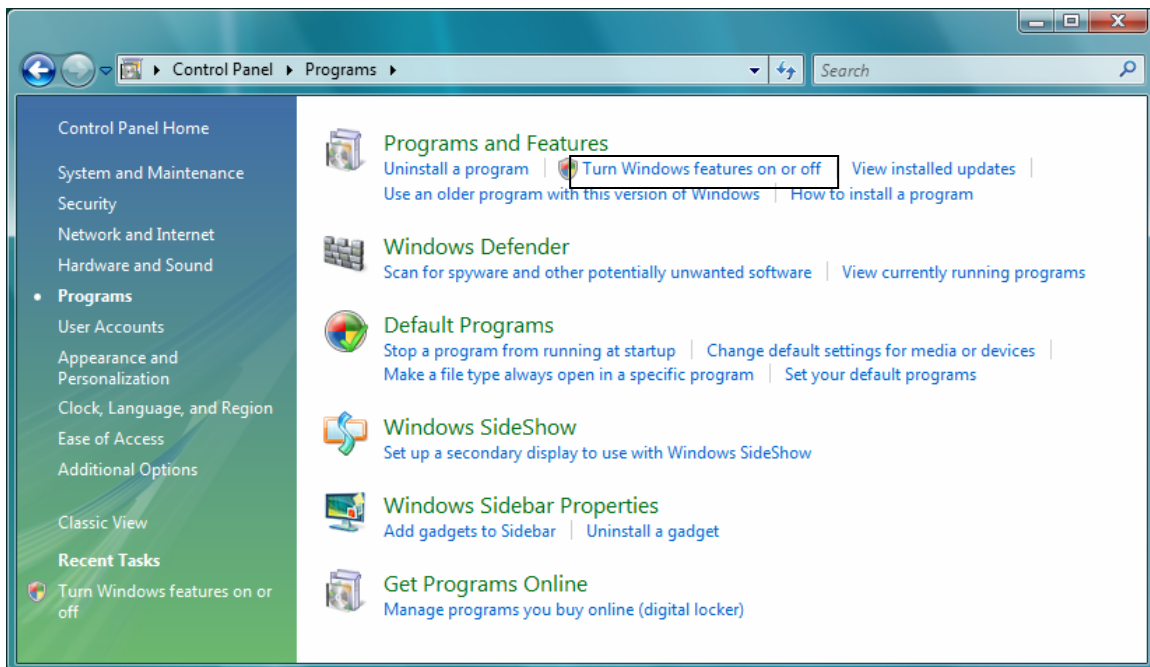
## Internet Information Services (IIS) Settings for Windows Vista/Windows 7 Professional

The following IIS setting must be made prior to installing ARTA Deposit. If the changes are not made, ARTA Deposit will not install correctly and therefore the application will not work.

**NOTE:** To make the following changes, Admin rights are needed.

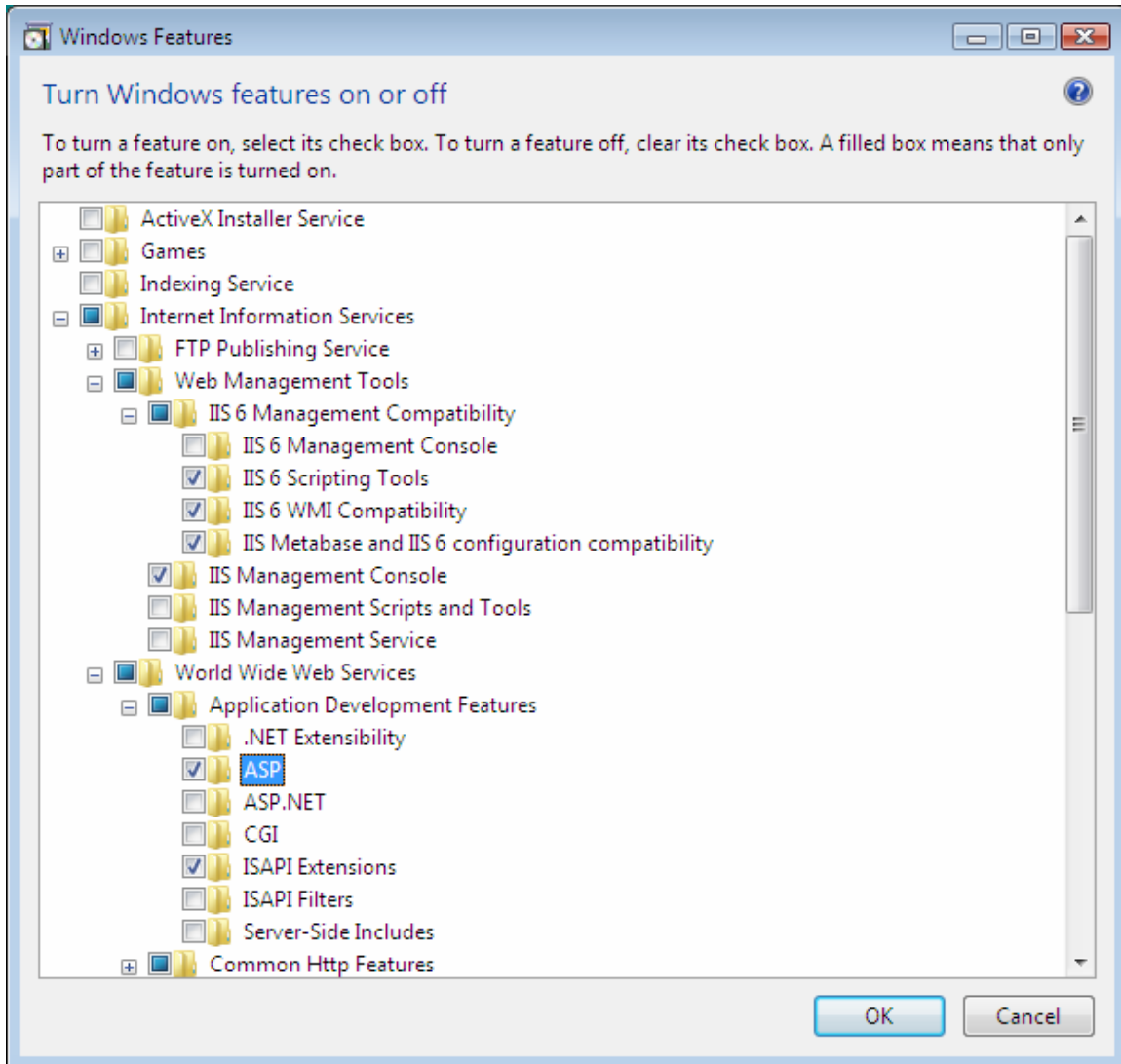
Follow these steps to verify the correct IIS settings are in place:

1. From the **Control Panel**, select **Programs**.
2. Under Programs and Features, select **Turn Windows features on or off**.



3. Click to expand the **Internet Information Services** folder.
4. Click to expand the **Web Management Tools** folder.

5. Click to expand the **IIS 6 Management Compatibility** folder and make sure the following are checked (an example of the window is shown below):
  - IIS Scripting Tools
  - IIS WMI Compatibility
  - IIS Metabase and IIS 6 configuration compatibility
6. Click to expand the **World Wide Web Services** folder.
7. Click to expand the **Application Development Features** folder and make sure the following are checked (an example of the window is shown below):
  - ASP
  - ISAPI Extensions
8. Click to expand the **Common Http Features** folder; verify the following are checked (an example of the window is shown below):
  - Default Document
  - Directory Browsing
  - HTTP Errors
  - Static Content
9. Uncheck **Health and Diagnostic**.
10. Uncheck **Performance Features**.
11. Click to expand the **Security** and make sure the following is checked.
  - Request Filtering
12. Click **OK**.



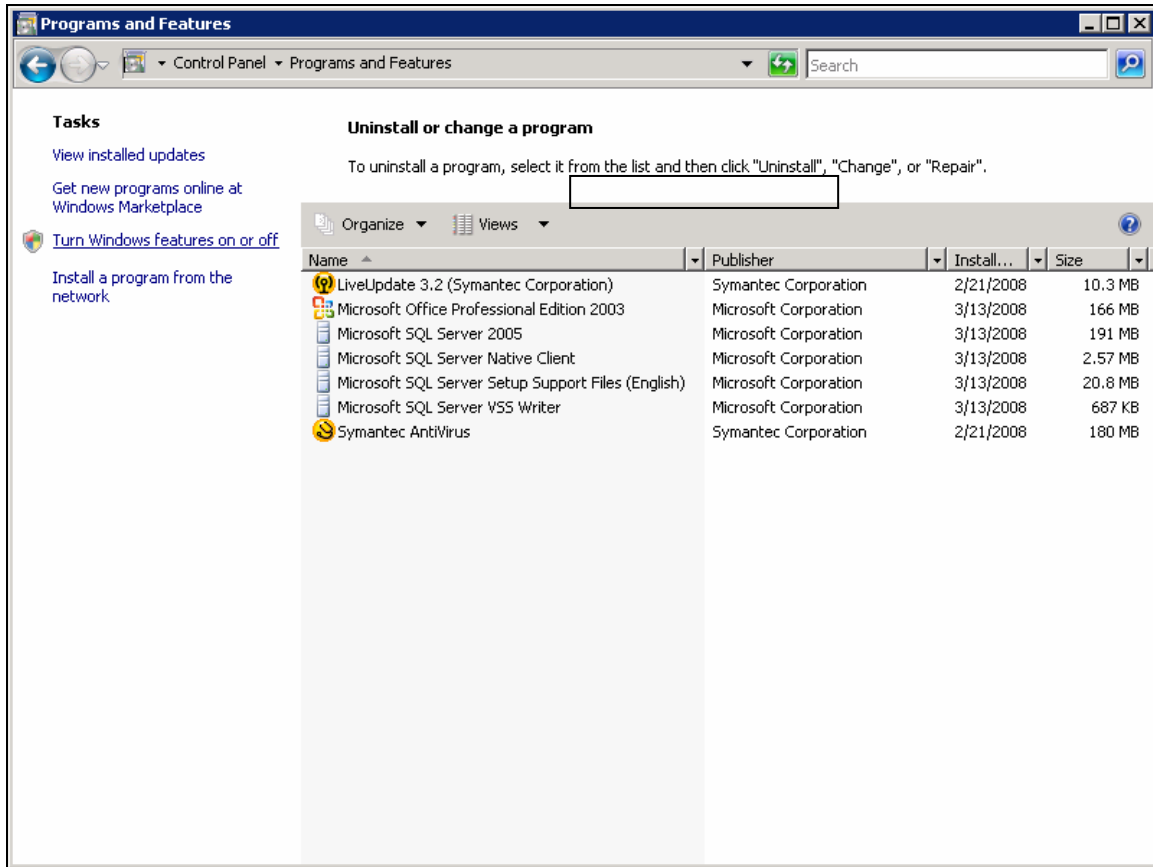
## Internet Information Services (IIS) Settings for Windows 2008 Server

The following IIS setting must be made prior to installing ARTA Deposit. If the changes are not made, ARTA Deposit will not install correctly and therefore the application will not work.

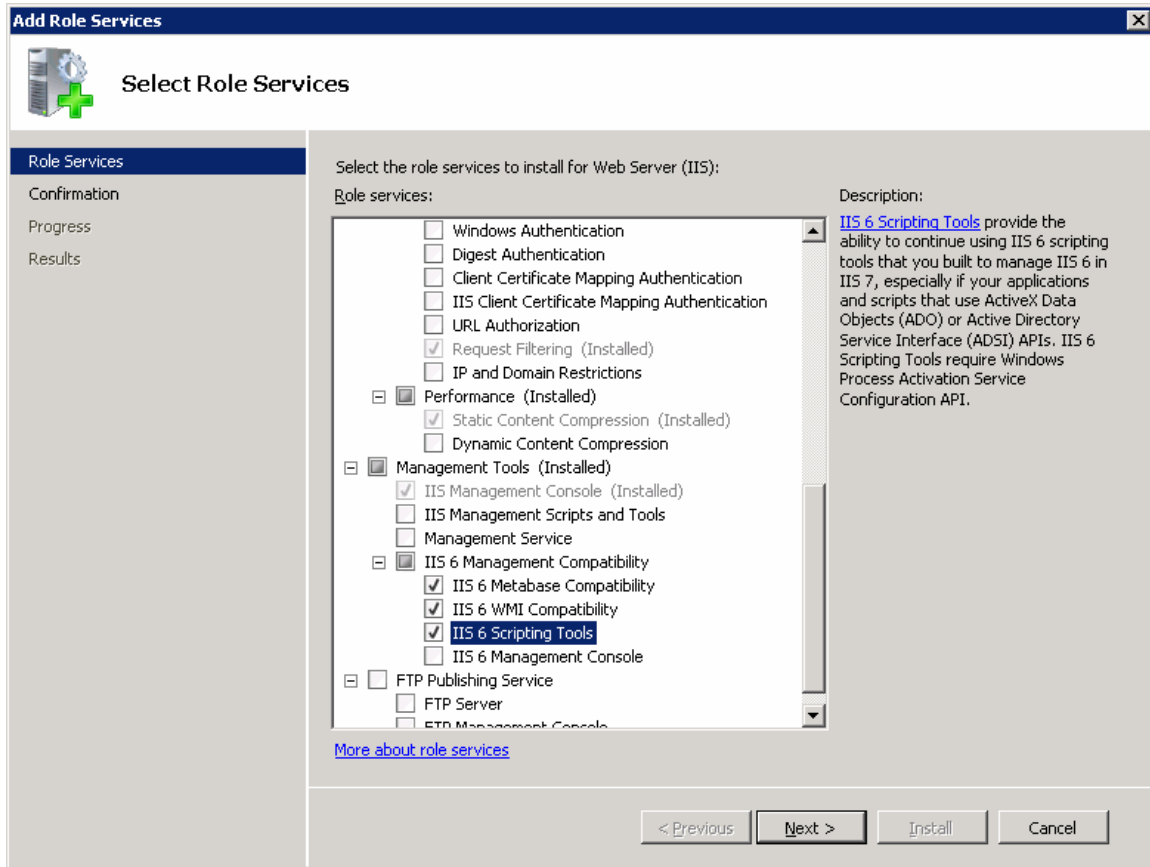
**NOTE:** To make the following changes, Admin rights are needed.

Follow these steps to verify the correct IIS settings are in place:

1. From the **Control Panel**, select **Programs and Features**.
2. Under **Programs and Features**, select **Turn Windows features on or off**.



3. The *Server Manager* screen appears. In the *Roles* screen, click **Add Roles** to initiate the **Add Roles Wizard**.
4. On the *Before You Begin* screen, click **Next**.
5. On the *Select Server Roles* screen, click the **Web Server (IIS)** checkbox. The *Add features required for Web Server (IIS)* dialog appears. Click **Add Required Features**.
6. Click **Next** to display the *Introduction to Web Server (IIS)* screen.
7. Click **Next** to display the *Select Role Services* screen. Click to expand the **Management Tools** folder.
8. Click the **IIS 6 Management Console** checkbox under **Management Tools**.
9. In the **IIS 6 Management Compatibility** folder verify the following are checked (an example of the window is shown below):
  - **IIS Metabase Compatibility**
  - **IIS WMI Compatibility**
  - **IIS Scripting Tools**



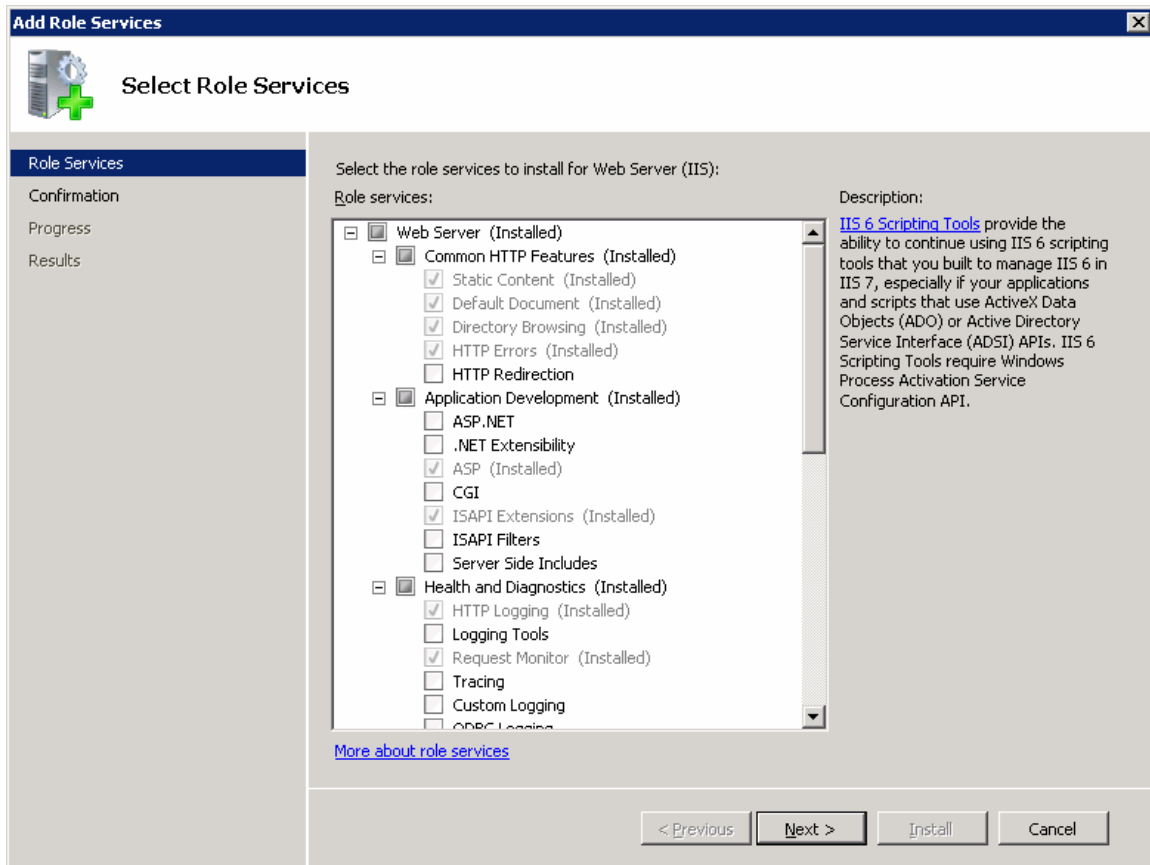
10. Click to expand the **Web Server** folder.

11. Click to expand the **Application Development Features** folder; verify the following are checked:

- **ASP**
- **ISAPI Extensions**

12. Under the **Web Server** folder, click to expand the **Common Http Features** folder; verify the following are checked (an example of the window is shown below):

- **Default Document**
- **Directory Browsing**
- **HTTP Errors**
- **Static Content**

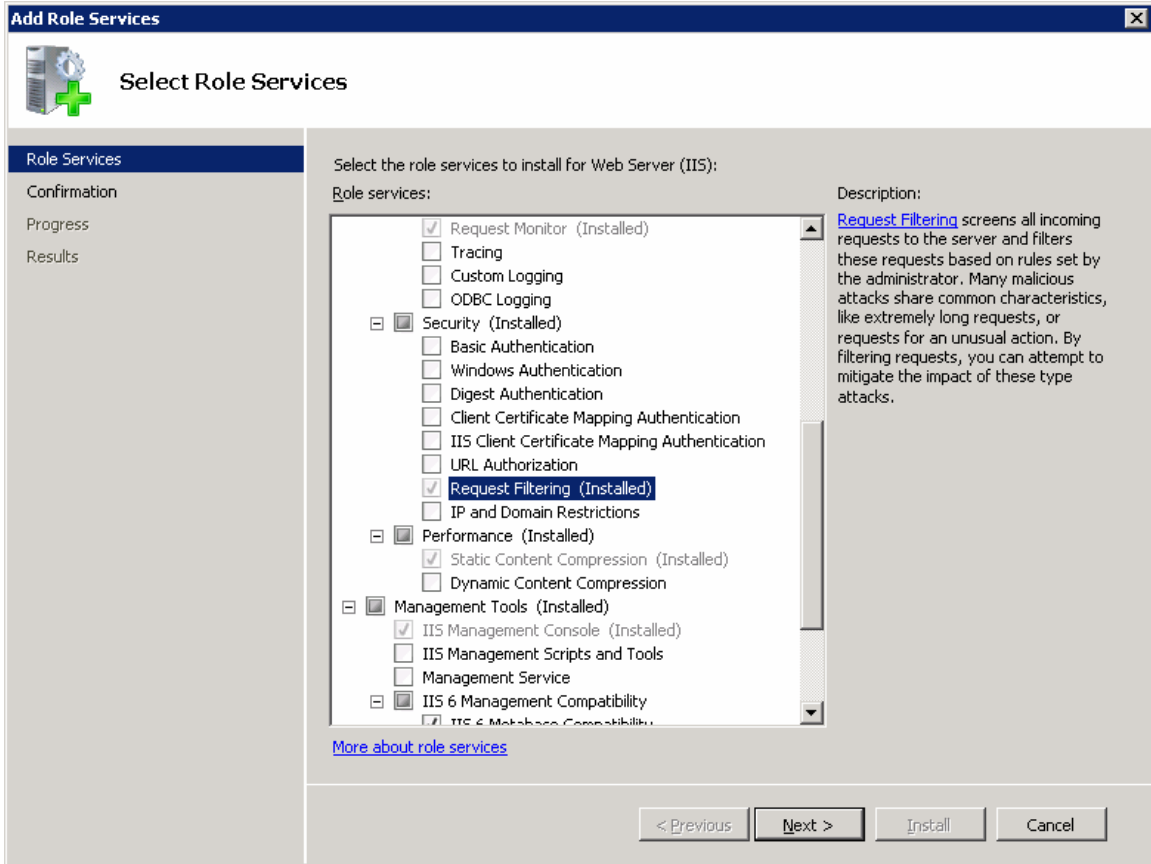


13. Uncheck **Health and Diagnostic**.

14. Uncheck **Performance**.

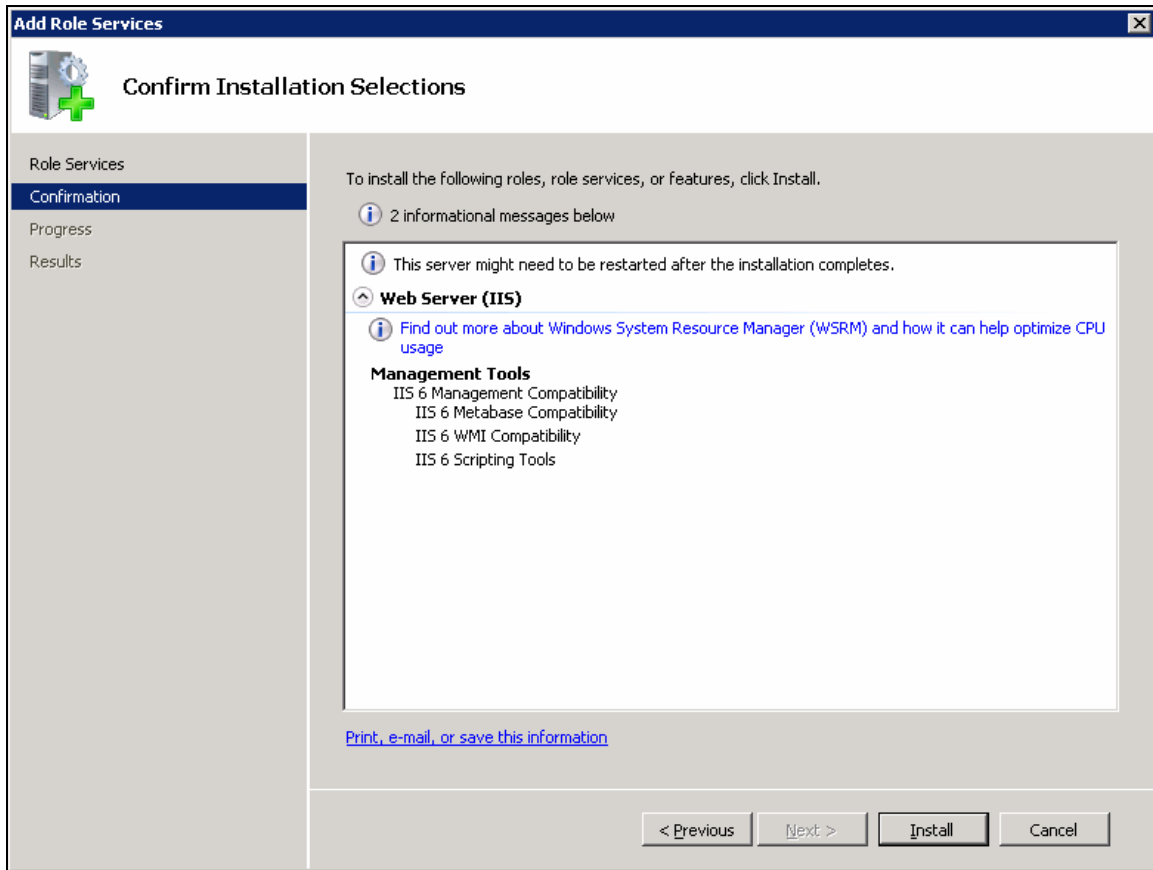
15. Click to expand the **Security** folder; verify the following is checked.

– **Request Filtering**

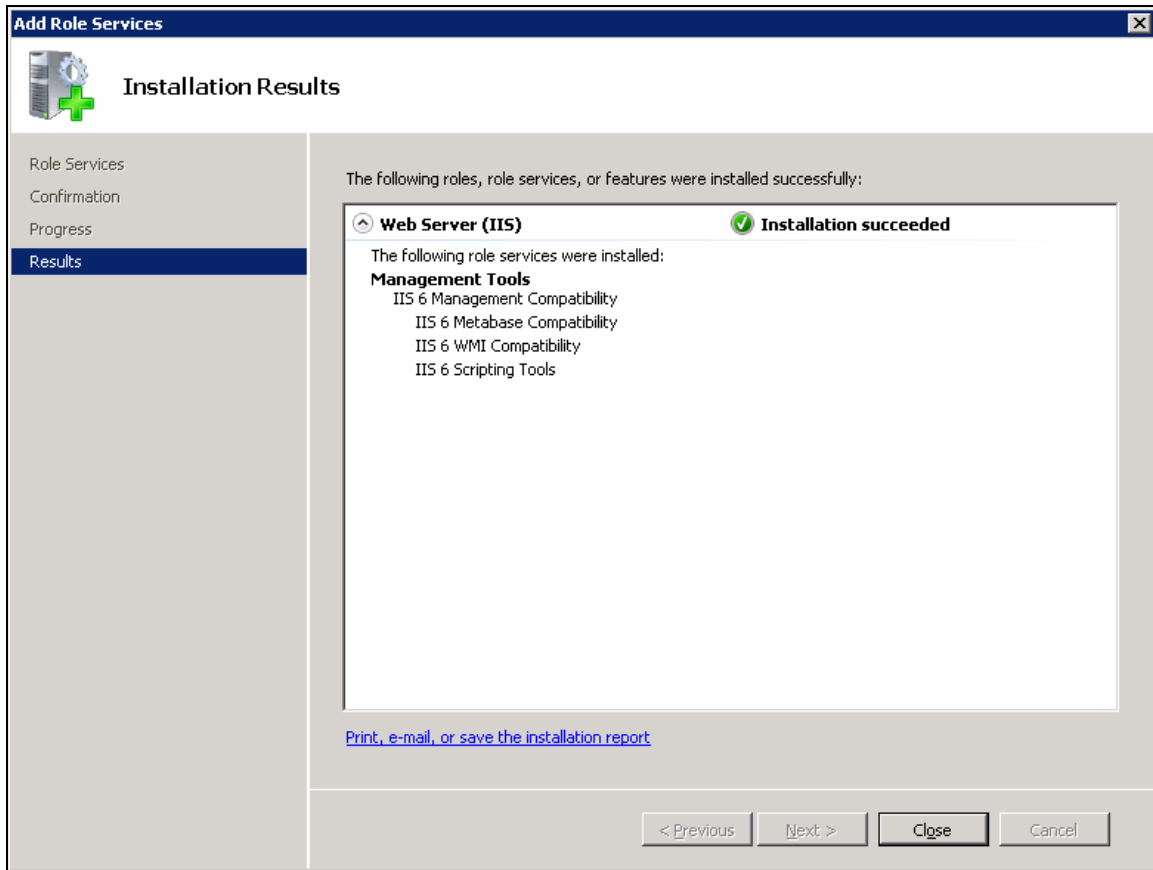


16. Click **Next**.

17. The *Confirm Installation Selections* screen appears. Click **Install**.



18. The *Installation Results* screen appears. Click **Close**.



## Microsoft Internet Explorer

ARTA Deposit shares many files with Internet Explorer and cannot operate without it. Therefore Internet Explorer (6.0 minimum) must be installed on every computer that uses ARTA Deposit. There are several ways of obtaining and installing Internet Explorer. Internet Explorer can be downloaded from the Microsoft web site or contact Microsoft Corporation to order. Refer to the documentation you received with Internet Explorer for installation and initial configuration instructions.

**NOTE:** Internet Explorer 7.0 is the default browser when installing Windows Server 2008.

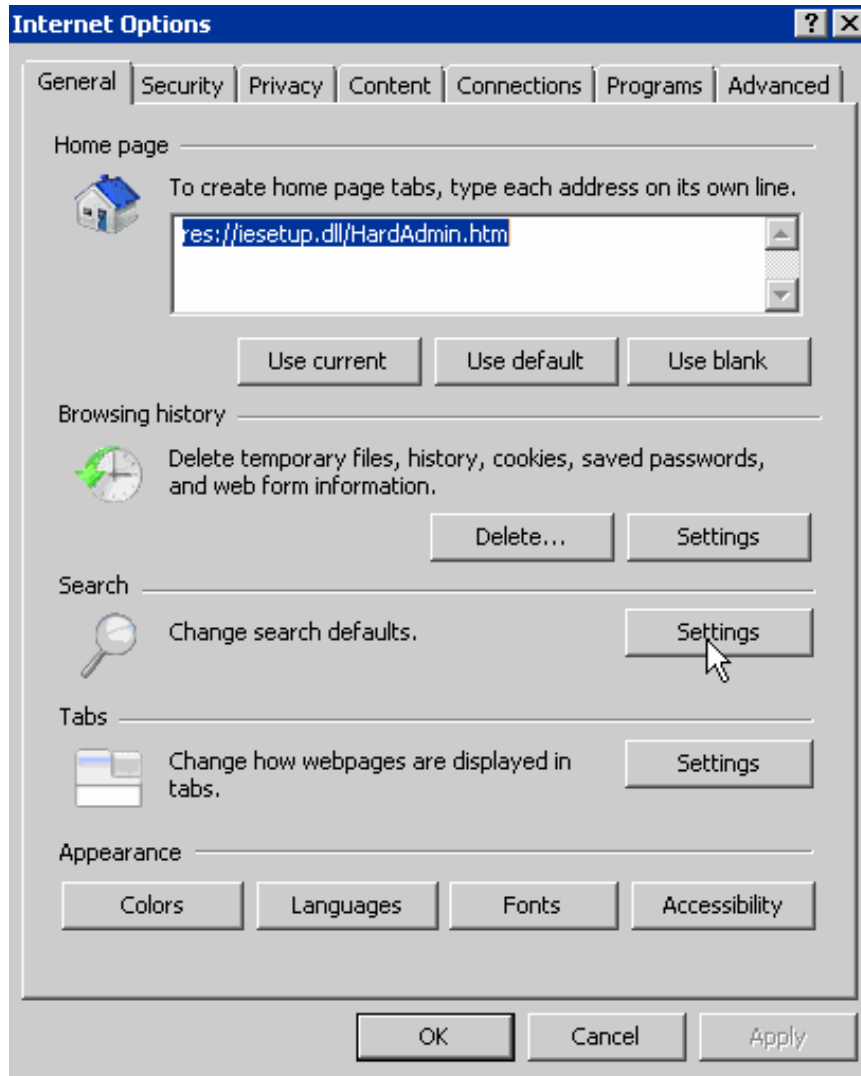
To verify the version of Internet Explorer, open Internet Explorer. Select **Help** then **About Internet Explorer** from the toolbar. The version number is the first item listed on the screen.

Wolters Kluwer Financial Services also supports Internet Explorer 7 with ARTA Deposit Version 2011.1. To learn more about this product, visit [http://www.microsoft.com/windows/ie/default.aspx?mg\\_ID=10010](http://www.microsoft.com/windows/ie/default.aspx?mg_ID=10010).

## Internet Explorer/ ARTA Deposit Settings

After you have installed Internet Explorer, follow the steps below to configure Internet Explorer settings for use by ARTA Deposit. These steps must be completed **on every computer for each user that will access ARTA Deposit**, regardless of whether it is a client or server.

1. Open Internet Explorer.
2. Select **Tools, Internet Options** from the main menu.



3. Select the **General** tab.
  - Click **Settings** in the **Browsing History** frame.
  - Click **Automatically** under **Check for new versions of stored pages**.
  - Click **OK** to return to the **Internet Options, General** tab.

4. Select the **Security** tab.
  - Select **Local intranet**.
  - Click **Custom Level...**
  - Select **Medium-low** in the **Reset to:** box at the bottom of the window.
  - Click **Reset**, then **Yes** to confirm.
  - Click **OK** to return to the **Internet Options, Security** tab.
5. Select the **Content** tab.
  - Select **Settings** in the **AutoComplete** frame.
  - If checked, clear the **Forms** checkbox in the *Use AutoComplete for* frame. Leave all other options in their current state.
  - Click **OK** to return to the **Internet Options, Content** tab.
6. Select the **Connections** tab.
  - Click **LAN Settings** in the *Local Area Network (LAN) settings* frame.
  - Verify whether the **Use a proxy server option** is checked on the LAN Settings page.
    - If this option is NOT checked, click **OK** to return to the **Internet Options, Connections** tab.
    - If this option is checked, verify that the **Bypass proxy server for local addresses** is also checked.
    - If ARTA Deposit is being installed in a network - small implementation, click **Advanced**. Type the computer name of the ARTA Deposit server followed by a semicolon (e.g., ARTADEPOSIT;) into the **Exceptions** box.
  - Click **OK** to return to the **Internet Options, Connections** tab.
7. Click **OK** to save all settings and return to Internet Explorer.
8. On the toolbar select **Page**; click **Encoding**.
9. Verify that **Western European (Windows)** is selected.

Repeat steps 1-9 on all computers that access ARTA Deposit.

## Delete Temporary Internet Files

Once you have Internet Explorer configured appropriately, we recommend you delete your temporary Internet files by completing the following steps:

1. Open Internet Explorer.
2. Select **Tools, Internet Options** from the main menu.
3. Click **Delete Files** in the **Temporary Internet Files** frame (found in the middle of the **General** tab page).

**NOTE:** In Internet Explorer 7.0, select **Browsing History**; click **Delete**.

4. A confirmation dialogue box will appear. Click **OK** to delete the Temporary Internet files.
5. Click **OK** to return to Internet Explorer.

Repeat these steps on all computers that access ARTA Deposit.

**NOTE:** We recommend you delete these temporary Internet files from time to time to assist in smooth operation of ARTA Deposit.  
Proceed to [Network - Small Implementation Server Installation](#).

## Prerequisites for 64-Bit Installation

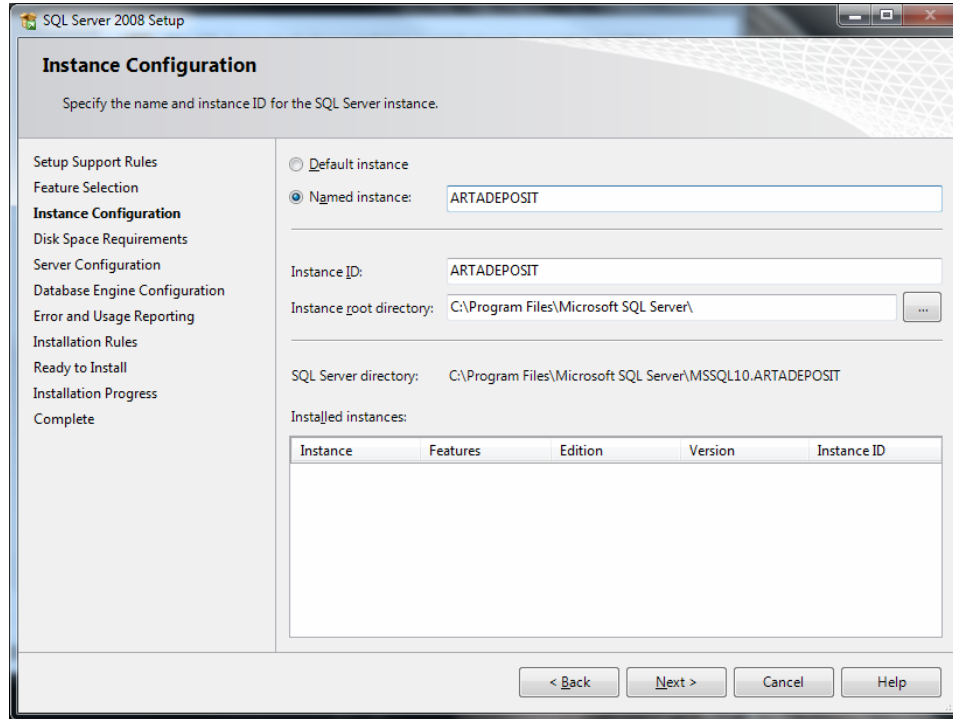
### SQL Server Express 2008 Service Pack 2

Before performing a new installation of ARTA Deposit on a supported 64-bit operating system, you will need to install SQL Server Express 2008, Service Pack 2. The file for installing Microsoft SQL Server 2008 SP2 Express Edition can be found on the Microsoft web site at:

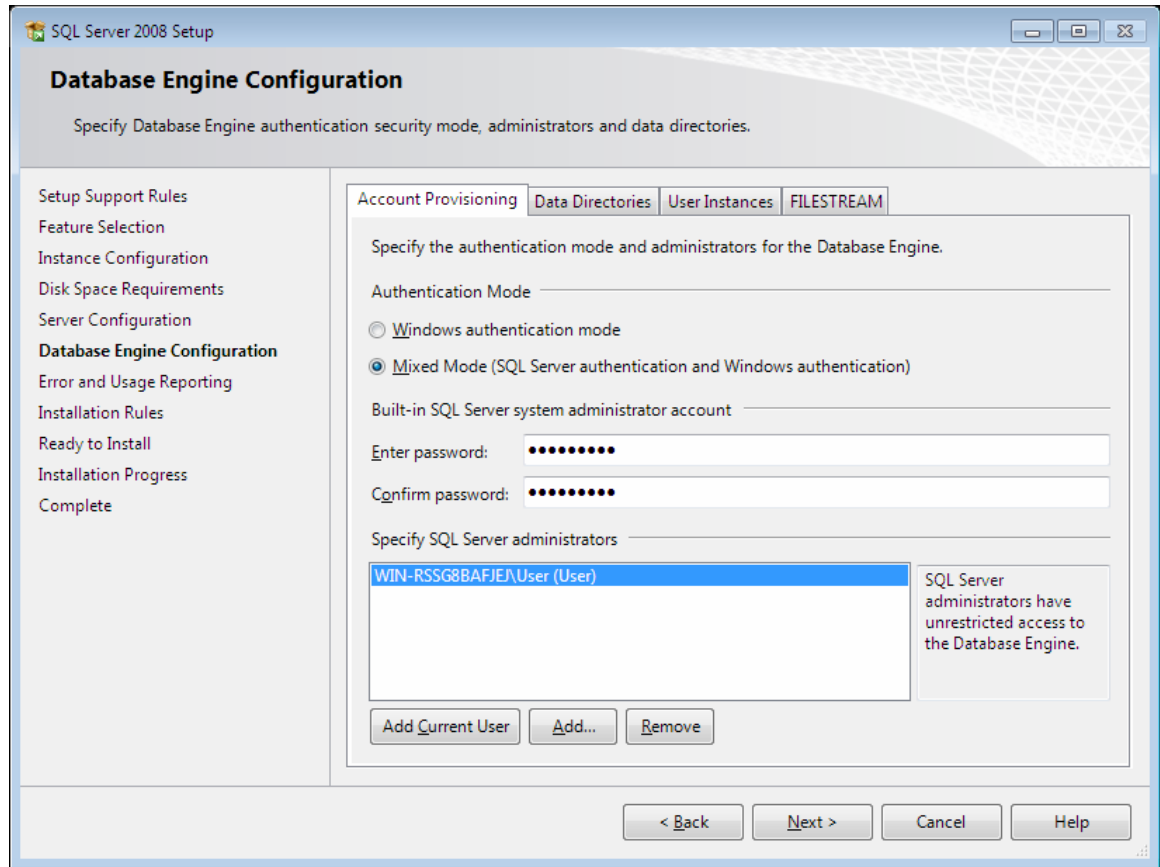
<http://www.microsoft.com/downloads/en/details.aspx?FamilyID=40ACF55F-0715-4BB0-9735-D02FC2C8A7AF>. Download and install **SQLEXP\_x64\_ENU.exe**.

During the installation of SQL Server Express 2008 SP2 you will need to make a number of configuration changes:

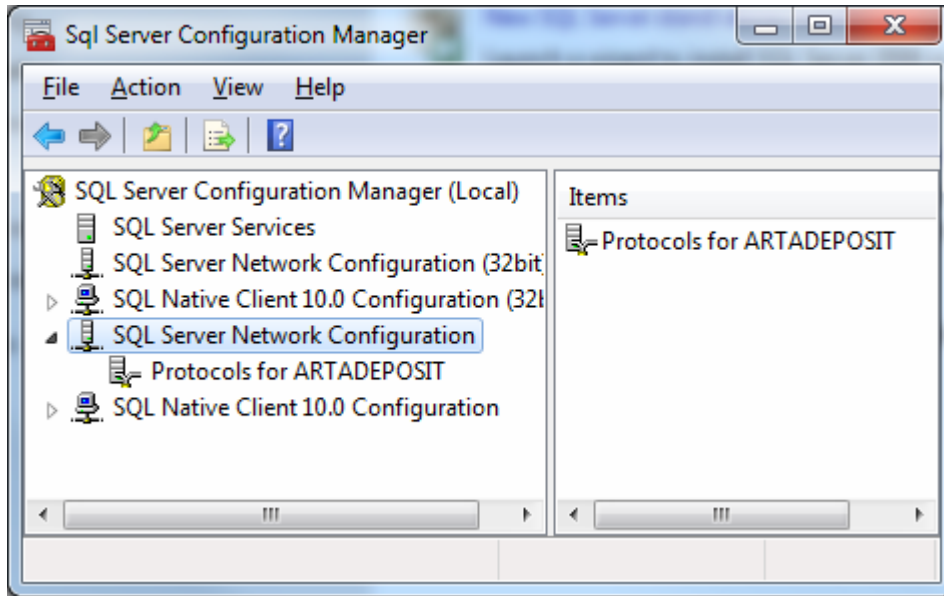
1. Click on Installation in the left hand side menu - Select New SQL Server.
2. Select Database Engine Services on the Feature Selection screen.
3. Type in **ARTADEPOSIT** as an instance name



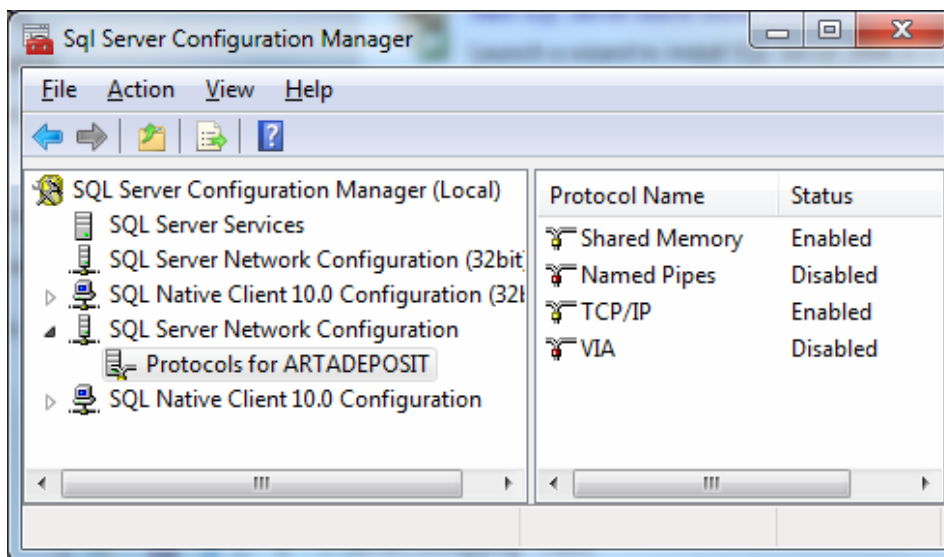
4. On the Server Configuration screen, pick NT AUTHORITY\SYSTEM for the account name for the SQL Server Database Engine.
5. On the Database Engine Configuration screen, pick Mixed Mode. Type in and confirm a password for the Built-in SQL Server system admin account.
6. Add your name to the SQL Server Administrator role by clicking **Add Current User**.



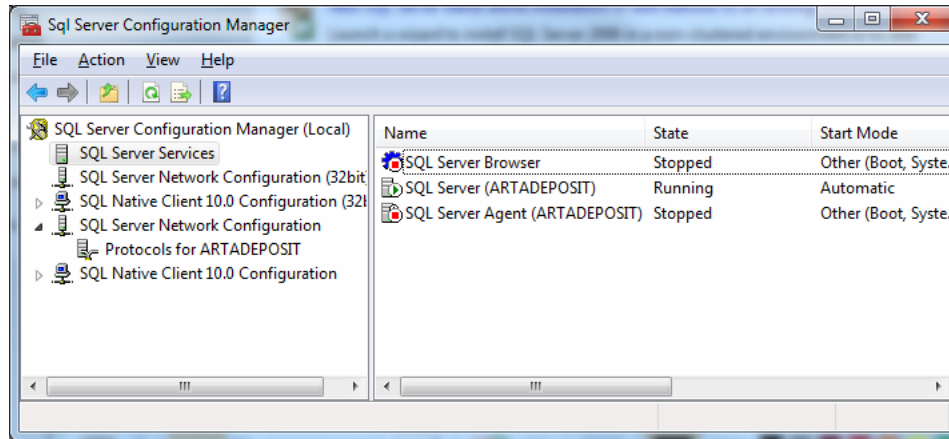
7. After completing the installation, go to Start, All Programs, Microsoft SQL Server 2008, Configuration Tools, SQL Server Configuration Manager.
8. Expand the **SQL Server Network Configuration**.



9. Double-click **Protocols for ARTADEPOSIT** and enable TCP/IP.



10. Select **SQL Server Services**, stop, and restart the **SQL Server (ARTADEPOSIT)** service.



Note: You might find it easier to manage databases and users with the Microsoft® SQL Server® 2008 R2 Management Studio Express tool. It is available for free download at <http://www.microsoft.com/downloads/en/details.aspx?familyid=56AD557C-03E6-4369-9C1D-E81B33D8026B&displaylang=en>

### Backwards Compatibility

After installing and configuring SQL Server Express 2008 and before using ARTA Deposit you will need to install the backwards compatibility so that the SQL DMO required by ARTA Deposit is installed. The backwards compatibility can be downloaded from Microsoft at <http://www.microsoft.com/downloads/en/details.aspx?FamilyID=50b97994-8453-4998-8226-fa42ec403d17&displaylang=en>. Download **SQLServer2005\_BC\_x64.msi** for 64-bit systems. To install, right-click on the filename and choose Install from the context menu.

### Update to .NET Framework 4.0

Before installing 2011.1 on all types of ARTA Deposit installations, that is standalone, small network, and large network, your version of .NET Framework might need to be updated to 4.0. The ARTA Deposit installation routine will determine if your machine has 4.0 installed. If not, it will automatically install it for you.

**Note:** If you have your database hosted on a separate machine, you do not need to update the .NET Framework on the database machine but it will not affect the operation of ARTA Deposit if you do.

### For 64-Bit Operating Systems Only - Install MSXML 4.0 SP3

If you are doing a new installation of ARTA Deposit on a supported 64-bit operating system, you will need to install MSXML4.0, Service Pack 3 before beginning your ARTA Deposit installation. The file **msxml.msi** can be found in the COM\MSXML4SP3 folder of the product CD. Right-click the file and choose **Install** from the context menu to begin the installation.



# Network - Small Implementation Server Installation

**NOTE:** This installation is intended for SQL Express

This configures the ARTA Deposit Documentation System to run in a server/client environment. First, ARTA Deposit must be installed on the ARTA Deposit server, and then client installations are completed on the workstation computers.

## Before You Begin

If you are updating from a previous version of ARTA Deposit, make sure to **back up** your existing ARTA Deposit database following the instructions provided with that version!

**A full backup should be performed after the initial installation and setup configuration as well as before and after each update you receive.**

The process for scheduling database backups now uses the Windows Task Scheduler rather than the ARTA Deposit utility previously provided. Refer to the *ARTA Deposit Version 2011.1 Release Notes* for complete information and instructions.

The setup program will require you to know the SQL Express administrator ID and password.

## MTS User

### New Install

We recommend an additional user be created on the local machine. The user name must be **mtsartaduser**. We also recommend you apply a password and set it never to expire. This user and associated password will be used to register the MTS package later in the installation process. You will need to remember the password you assigned to this user. See [Appendix C, Creating the mtsartaduser Account](#) to create this user.

It is also important to verify the **Must change password on next login** box is NOT checked.

### Update Install

If you are updating from Version 2010.2 to Version 2011.1, the MTS user should already be created as it was needed for the previous version. You will need to know the MTS user password for this installation process.

## ARTA Deposit Server Installation

Be certain all users are logged out of ARTA Deposit before installing ARTA Deposit Version 2011.1. The following instructions must be performed at the server console or on the workstation computer that is acting as the ARTA Deposit server.

1. Verify that all users are logged off this computer. It must be restarted during the installation process.
2. Log on as the Administrator.
3. Exit all programs that may be open. The following steps assume that no other programs are running and the virus checker has been disabled.
4. Insert the ARTA Deposit CD-ROM into the CD-ROM drive.
5. Select **Start, Run** from the Windows main menu.
6. Select **Browse** to locate the CD-ROM. Double-click **Setup.exe**. The Setup.exe program is located in the root directory (For example, D:\Setup.exe).

**Note:** If you are doing a new installation of ARTA Deposit on a supported 64-bit operating system, you will need to begin the installation by double-clicking the **setup64.bat** file from the root of the product CD. Do not use **setup.exe**.

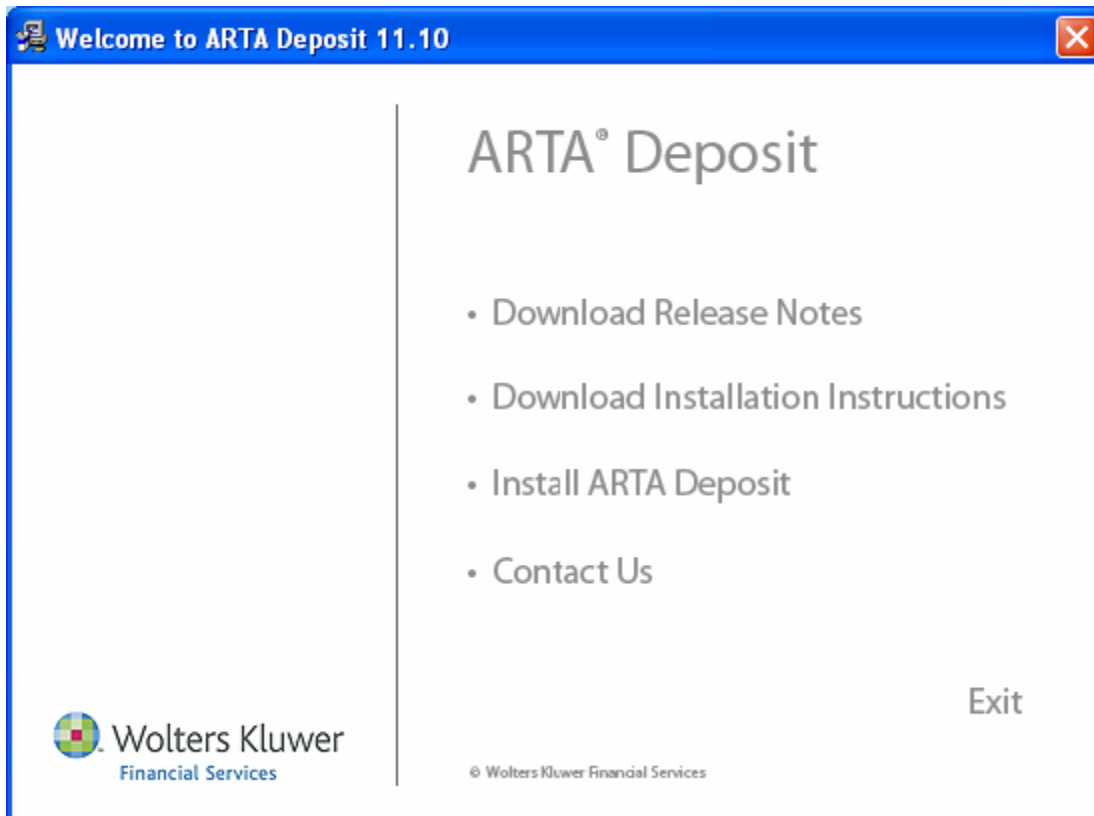
7. Click **OK** to run the Setup program.

The Setup program will display this series of windows:

## Welcome to ARTA Deposit 2011.1

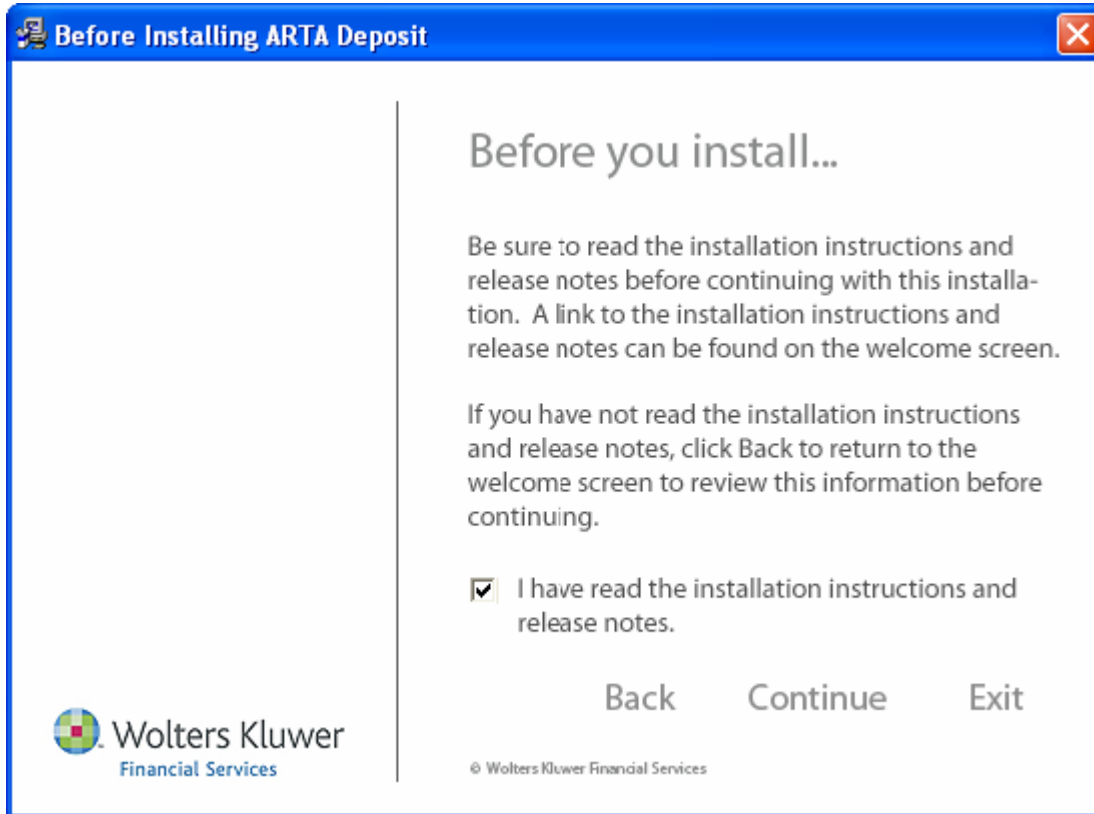
The Welcome screen provides links to obtain documentation and contact support, as well as to begin the installation. Specific downloading instructions can be found as part of the Contact information in this document.

**NOTE:** The ARTA Deposit Installation Instructions and Release Notes are provided on the ARTA Deposit CD-ROM in PDF format.



## Before Installing ARTA Deposit

This screen ensures you have read the ARTA Deposit documentation. Check the box then click **Continue**.



## Program Update (Update Only)

If the setup program detects an older version of ARTA Deposit already installed, a warning message will appear to be sure that you have backed up all data files. Options are to continue updating or quit the installation.

## Conversion Information

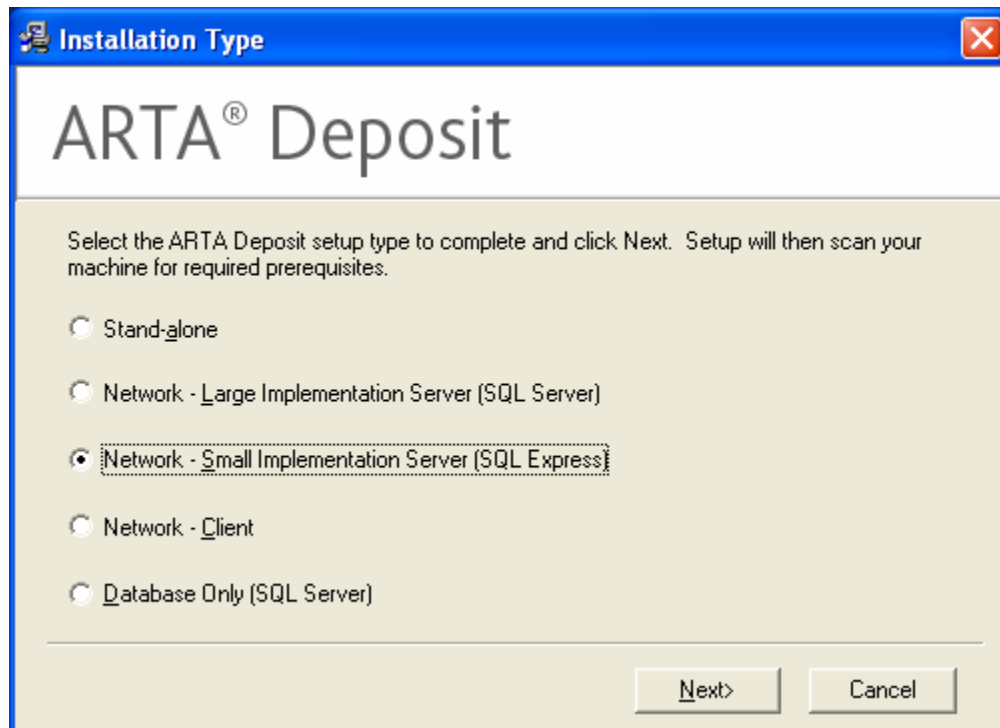
If updating from a previous version of ARTA Deposit to Version 2011.1, a conversion of your data must take place. This conversion may take several hours to complete, depending on the amount of existing data. Perform one of the following:

- Click **Yes** to perform the data conversion
- **No** to exit the setup program

## Installation Type (New Install Only)

This screen will display only on a new installation (i.e., a previous version of ARTA Deposit is not detected by the setup program). Stand-alone is the default option. Select **Network - Small Implementation Server (SQL Express)** then click **Next** to continue.

When updating or reinstalling, the setup program will skip this screen and automatically use the previously selected installation type.



## Prerequisite Check

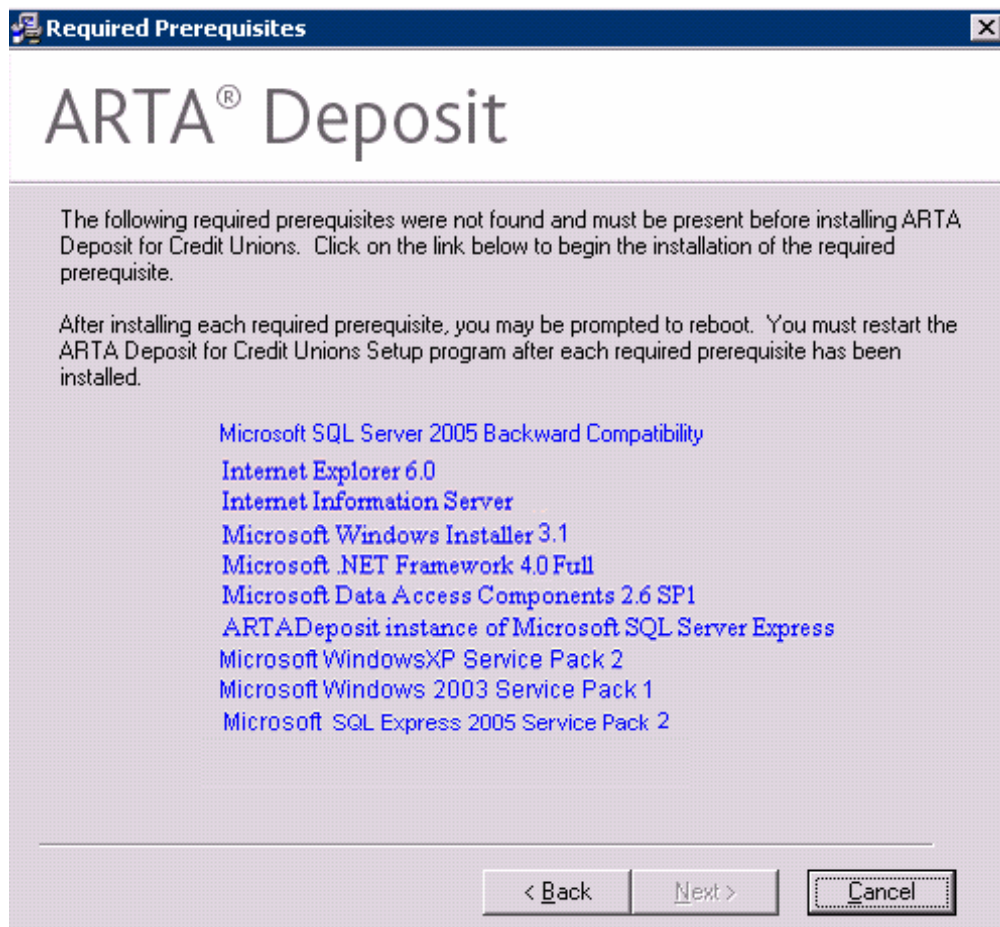
After selecting the installation type, the setup program will check your computer for the prerequisites.

- If all of the prerequisites are installed, the setup program will continue to the *Welcome* screen.
- If any of the prerequisites are missing, the setup program provides information or a link (similar to the screen shown below) to help you acquire the prerequisite.

Click on the prerequisite listed to obtain the information or access the link. Upon selection, setup will exit. If a link has been provided, click **Next** to begin that install. Once the install of that prerequisite is complete, your computer may reboot and you will need to restart the setup program.

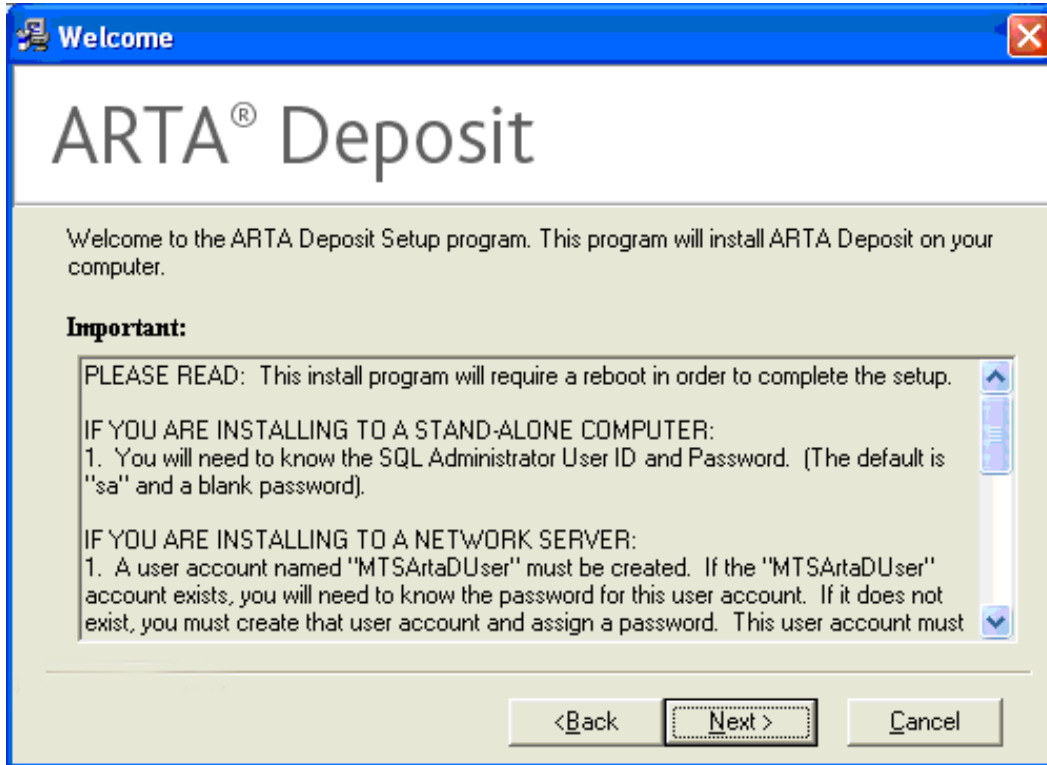
The *Required Prerequisite* screen will appear with each restart of the setup program until all prerequisites have been installed. The prerequisite(s) will be listed on the screen in the order in which they need to be installed. In some cases, a prerequisite will not display until the previous prerequisite has been installed. For example, if both Windows Installer and the .NET Framework

are missing, only Windows Installer will display the first time as it is a prerequisite to .NET Framework. Once Windows Installer is detected, then the .NET prerequisite will be listed.



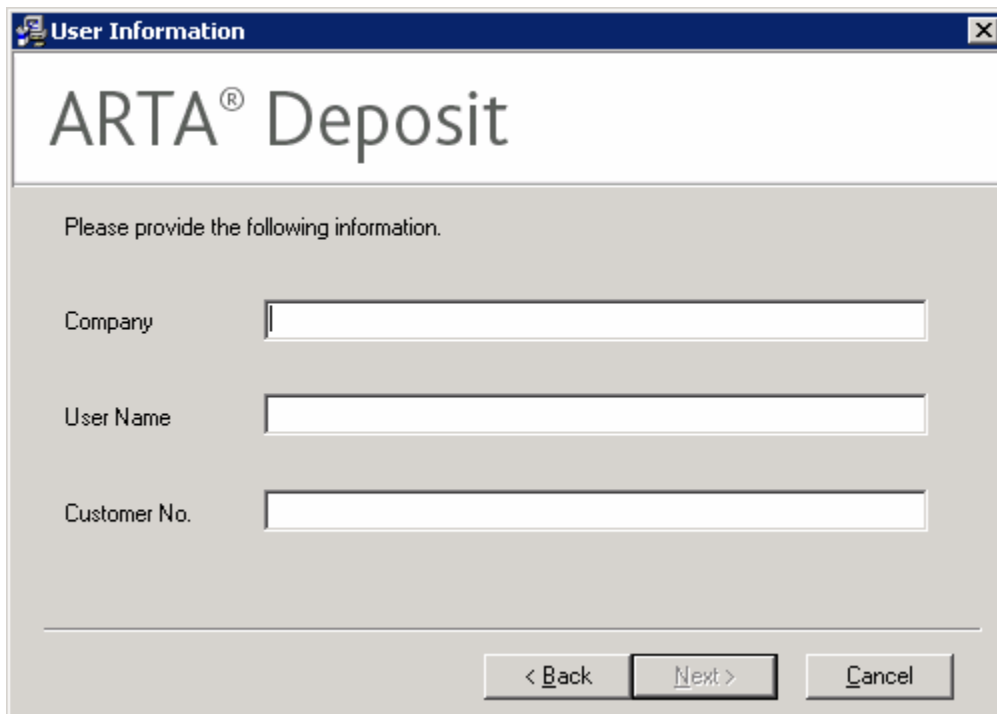
## Welcome

This screen verifies the installation program is ready to begin. After you have read the Important: information, click **Next** to continue.



## User Information

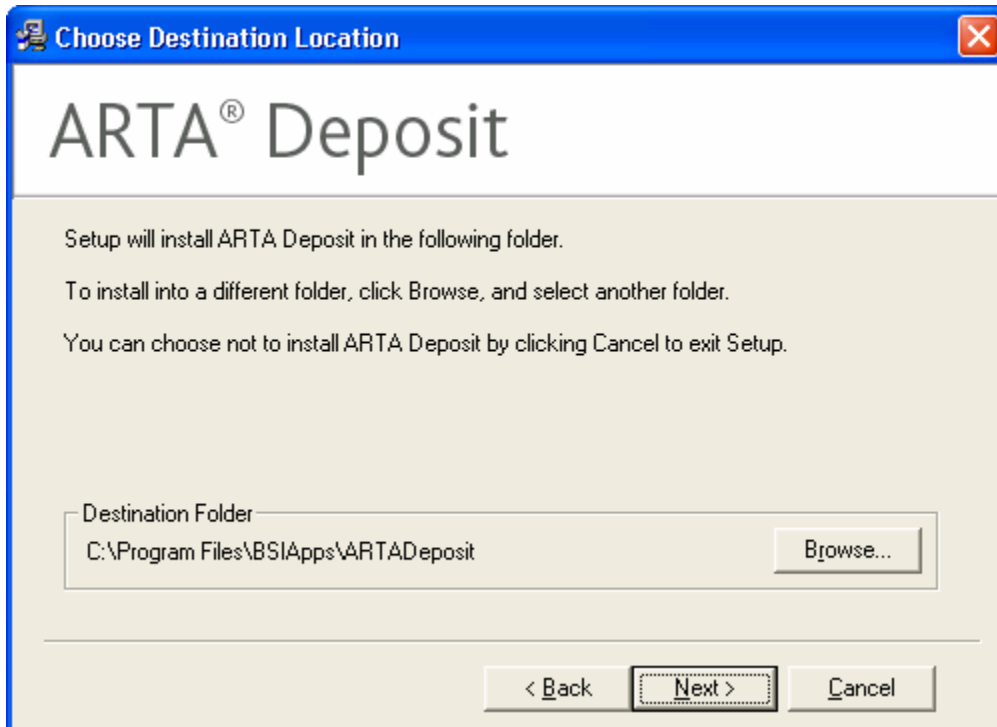
Type in or verify your company name, your user name and your current Wolters Kluwer Financial Services customer number. Contact SupportLine if you are unsure of your current customer number. Click **Next** to continue.



The screenshot shows a Windows-style dialog box titled "User Information" with a close button in the top right corner. The main heading inside the dialog is "ARTA® Deposit". Below the heading, the text "Please provide the following information." is displayed. There are three input fields: "Company", "User Name", and "Customer No.", each with a corresponding text box. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

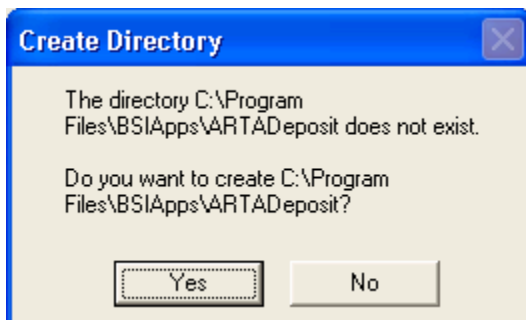
## Choose Destination Location (New Install Only)

Accept the default path of C:\Program Files\BSIApps\ARTADeposit (recommended) or use the **Browse** button to select another local drive and directory where you want to install the ARTA Deposit files. Click **Next** to continue. The original installation path will be used for updates and reinstallations.



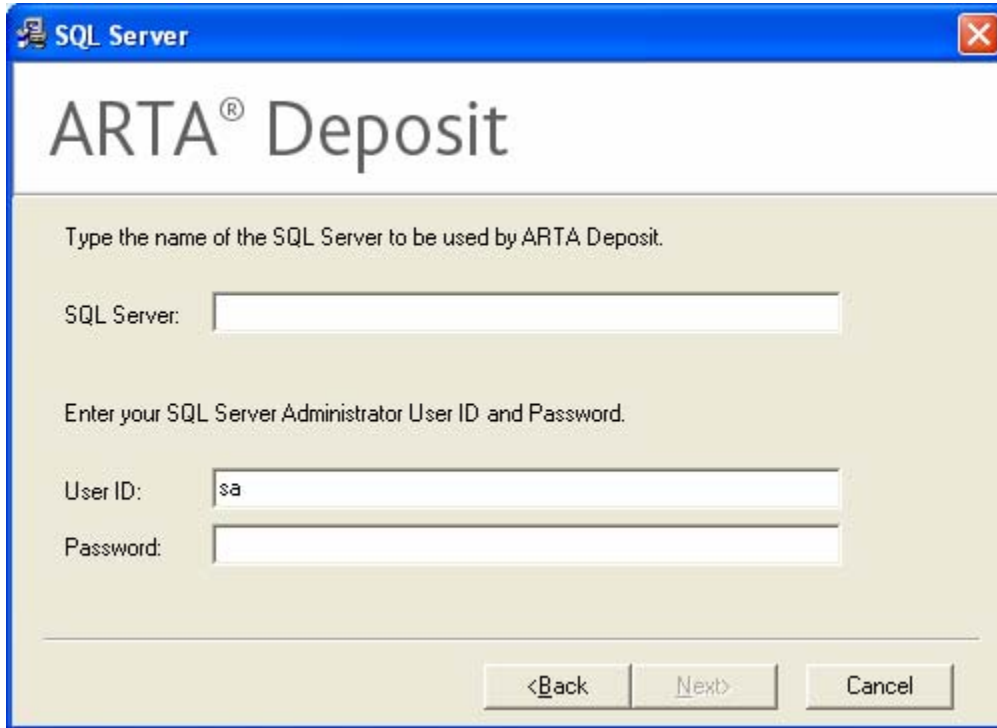
### Create Directory

The *Create Directory* dialog box appears if the default destination folder designated on the *Choose Destination Folder* screen does not exist. Click **Yes** to create the destination folder.



## SQL Server

The SQL Server name and user ID will default to this screen for you. Enter the SQL Server administrator password. Click **Next** to continue.



The screenshot shows a window titled "SQL Server" with a blue header bar. Below the header, the text "ARTA® Deposit" is displayed in a large font. The main area of the window is light beige and contains the following text and input fields:

Type the name of the SQL Server to be used by ARTA Deposit.

SQL Server:

Enter your SQL Server Administrator User ID and Password.

User ID:

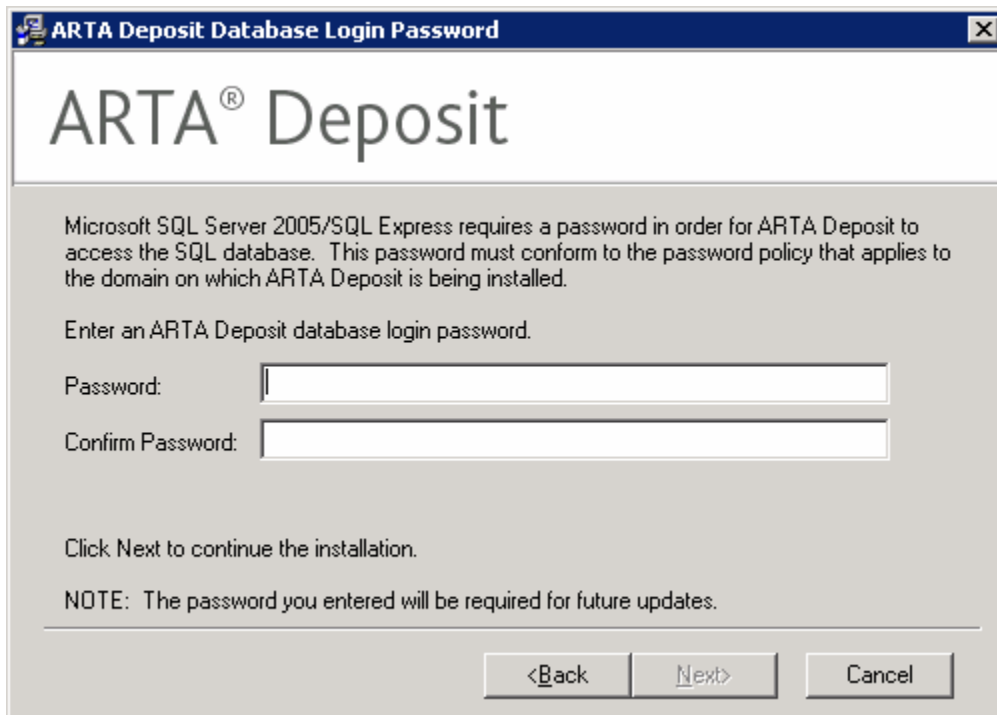
Password:

At the bottom of the window, there are three buttons: "<Back", "Next>", and "Cancel".

**NOTE:** The SQL Server Administrator account password is required; it cannot be blank.

### Database Login Password (New Install Only)

Type and confirm a new password that allows ARTA Deposit to interact with the SQL database.



The screenshot shows a Windows-style dialog box titled "ARTA Deposit Database Login Password". The main heading is "ARTA<sup>®</sup> Deposit". Below this, a message states: "Microsoft SQL Server 2005/SQL Express requires a password in order for ARTA Deposit to access the SQL database. This password must conform to the password policy that applies to the domain on which ARTA Deposit is being installed." The instruction "Enter an ARTA Deposit database login password." is followed by two text input fields: "Password:" and "Confirm Password:". Below the fields, it says "Click Next to continue the installation." and includes a "NOTE: The password you entered will be required for future updates." At the bottom, there are three buttons: "<Back", "Next>", and "Cancel".

## Additional Client Setup Options

This window provides options for setting up default information for additional client installations.

- Enter the computer name of the ARTA Deposit server or accept the default. (*recommended*)
- Type in the location where the client files will be installed on the client computer or accept the default of C:\Program Files\BSIApps\ARTADeposit. (*recommended*)
- You may also choose **Run client installs in unattended mode**. This allows client installations to run with minimal user interaction. (*recommended*)
- Click **Next** to continue.

**Additional Client Setup Options**

# ARTA<sup>®</sup> Deposit

For additional client setups, you may specify the following options as defaults for each client machine. During the client setup, this information will be provided as the default information.

The end user will have the opportunity to change this if they desire as long as the client setup is not run in unattended mode

Server Computer Name:

Default Client Install Folder:

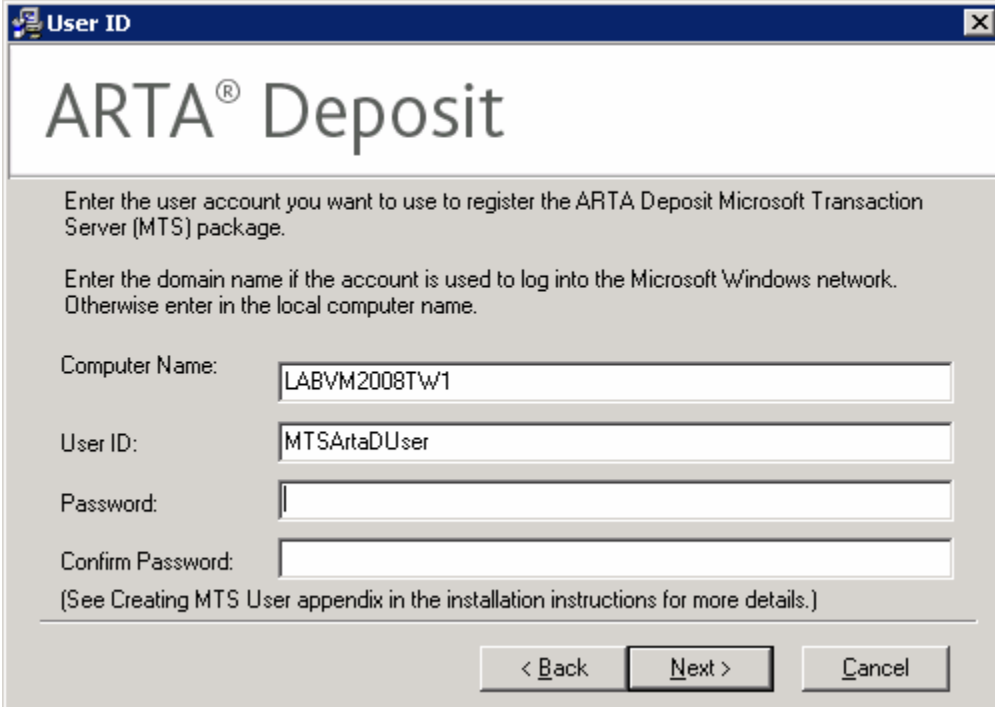
Note: The server computer name and default client install folder will not prompt when client installs are run in unattended mode.

Run client installs in unattended mode.

< Back   Next >   Cancel

## MTS Registration (User ID)

- Enter the domain or computer name as requested, then enter the mtsartaduser user ID and password established prior to installation to the local workstation. It is important to enter this information correctly. (See [Appendix C, Creating the mtsartaduser Account](#) for more information.)



The screenshot shows a Windows-style dialog box titled "User ID" for "ARTA Deposit". The dialog contains the following text and fields:

Enter the user account you want to use to register the ARTA Deposit Microsoft Transaction Server (MTS) package.

Enter the domain name if the account is used to log into the Microsoft Windows network. Otherwise enter in the local computer name.

Computer Name:

User ID:

Password:

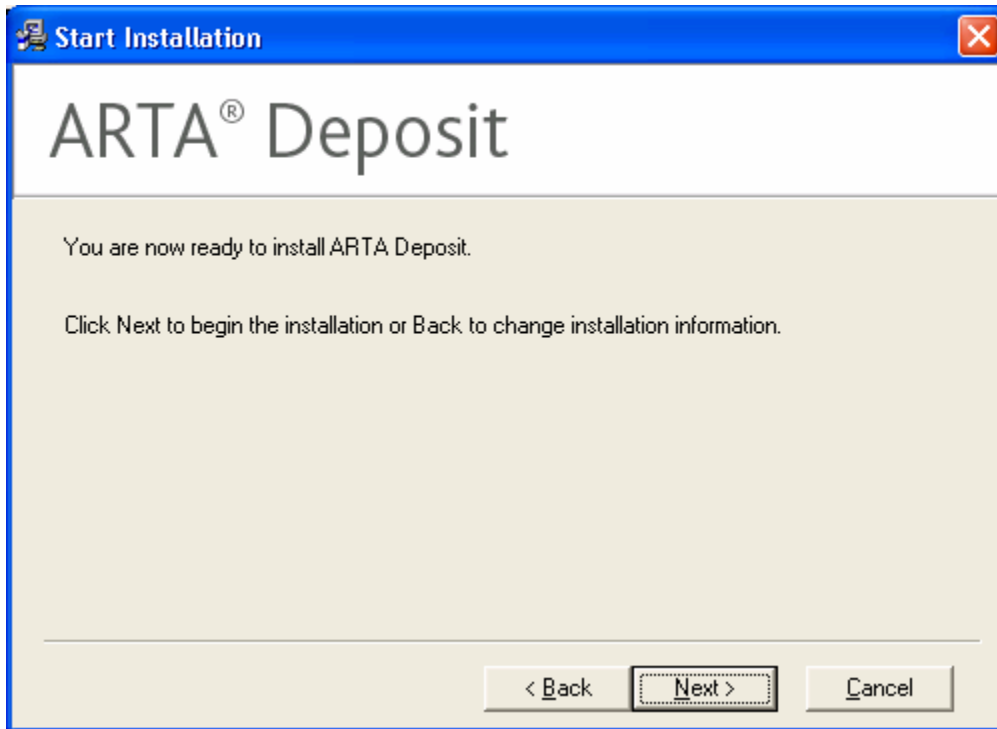
Confirm Password:

(See Creating MTS User appendix in the installation instructions for more details.)

At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

## Start Installation

Click **Next** to continue.



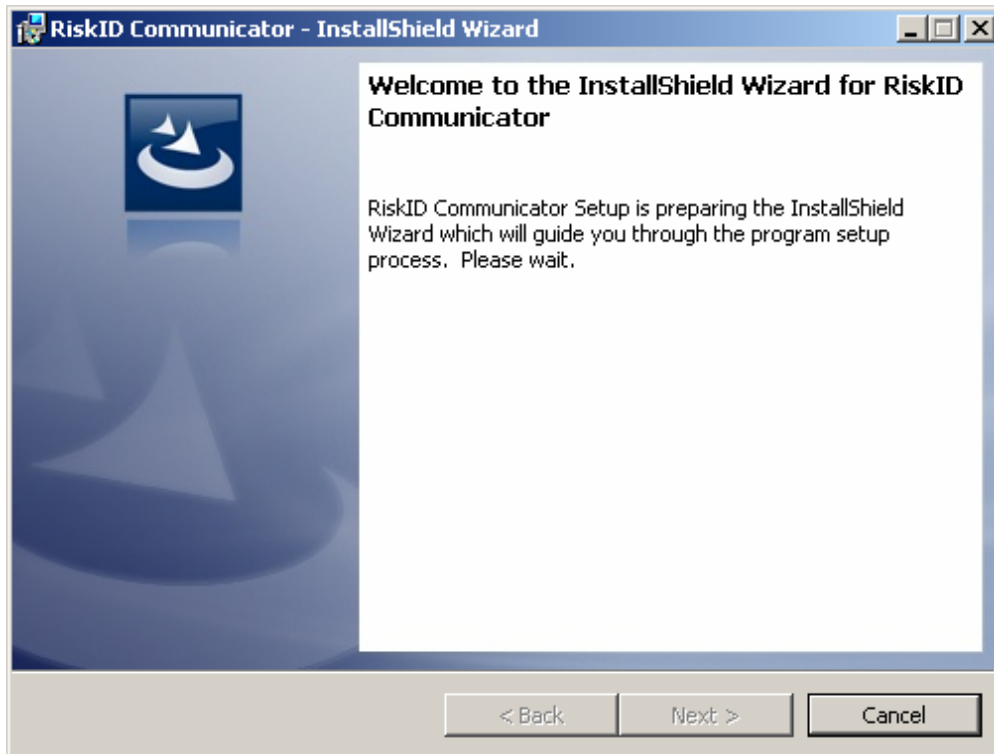
## Computer Restart Required

Click **Yes** to restart the computer. The computer must be restarted to continue the installation routine. After the computer restarts, the ARTA Deposit setup program will continue.



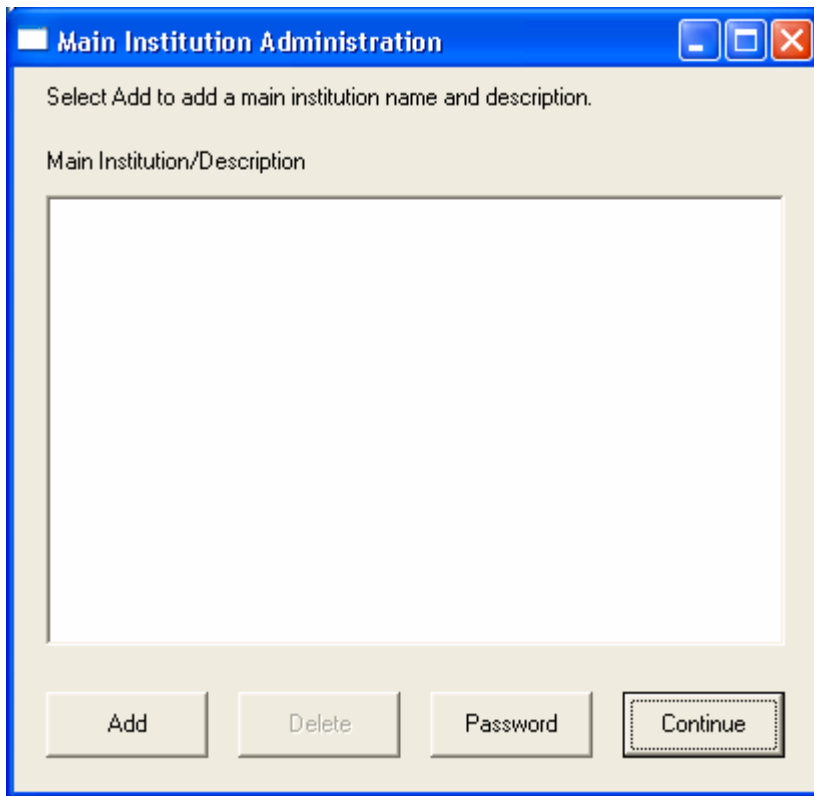
**IMPORTANT:** When you are presented with a login screen, it is important to wait 3 to 5 minutes for processing and services to begin, before logging in. When that time has passed, you must log in using the same user name as when the ARTA Deposit installation process was started.

## RiskID Installation



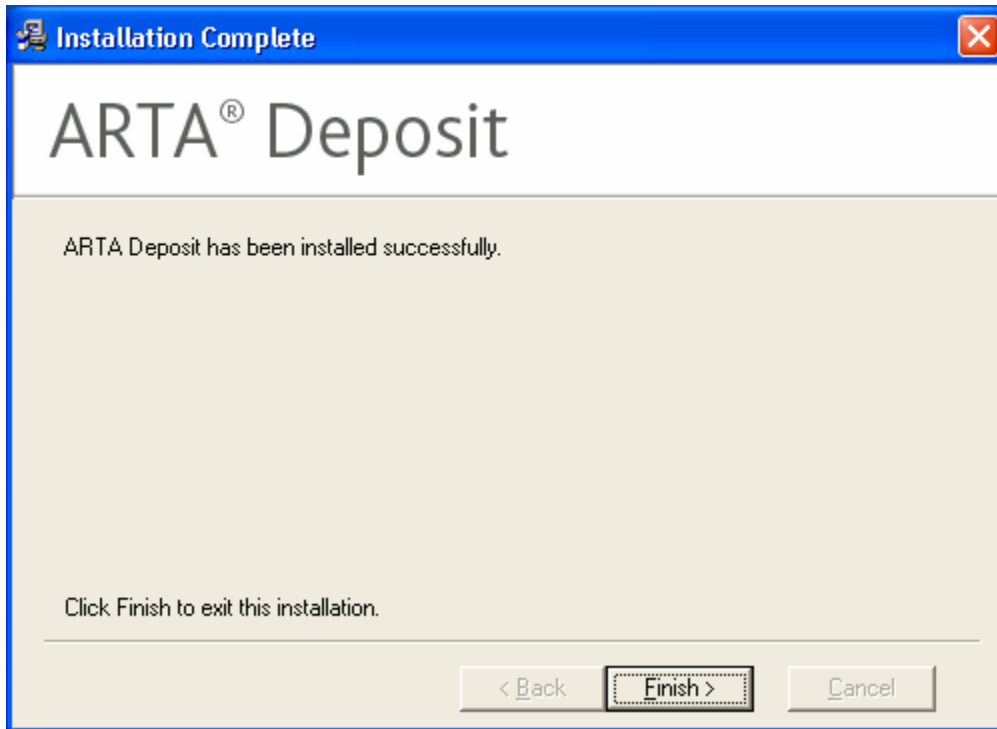
### Institution Administration (New Install Only)

Click **Add**, enter the name and description of your main institution, then click **Continue**.



### Installation Complete

Click **Finish** to close the installation program.



After the ARTA Deposit Server Installation is complete, proceed to [Getting Started - Client Installation](#).

# Getting Started - Client

## Know Your Configuration

Select the Client installation if you have completed the ARTA Deposit server installation and you are now installing ARTA Deposit on a workstation connected to that ARTA Deposit server. The Client installation must be performed on all computers that access the ARTA Deposit server. (See figure for Network - Small Implementation Server, which includes client workstations.)

## System Requirements

These requirements apply to all client workstations, regardless of the server.

- Windows XP Professional/Windows Vista/Windows 7 Professional.
- 2.66 MHz Pentium processor or greater
- 512 MB RAM or greater (one GB is recommended)
- 100 MB available hard disk space
- 1 MB video controller capable of 800X600 pixels at 256 colors
- 17-inch color VGA monitor capable of running 800X600 resolution
- 24X speed CD-ROM drive or greater

## Installation Prerequisites - Client

Installation Prerequisites	TCP/IP	Internet Explorer 6.0	IIS	SQL Express (1-5 users; up to 10 users on server)
Windows XP Professional	●	●		
Windows Vista	●	●		
Windows 7 Professional	●	●		

# Network Client Installation

The following instructions describe the steps necessary to complete ARTA Deposit Client installations after the ARTA Deposit Server installation has been accomplished.

## Before You Begin

- Verify the server installation is complete and functional.
- If you are installing on a Server with Terminal Services, you must be in the Install Mode before you begin the installation of ARTA Deposit.

## ARTA Deposit Client Installation

The series of windows that appear may vary, depending on what information is designated during the server installation.

You can run the Client Setup program at the client computer using either the **Client** folder from the ARTA Deposit server or the ARTA Deposit CD-ROM.

In order to run the Setup program from the ARTA Deposit server, you must be able to browse to the computer where ARTA Deposit Server is installed and have file sharing enabled. Also, you must have a share created. If you are unfamiliar with this process, you may run the Client installation routine from the ARTA Deposit CD-ROM.

1. Verify that all users are logged off this computer. It must be restarted during the installation process.
2. Log on as the Administrator.
3. Exit all programs that may be open. The following steps assume that no other programs are running and the virus checker has been disabled.
4. Insert the ARTA Deposit CD-ROM into the CD-ROM drive.
5. Select **Start, Run** from the Windows main menu.
6. Double-click the **setup.exe** file on the root of the ARTA Deposit CD-ROM to start the program. (For example, D:\Setup.exe) This installation will require you know the computer name of the ARTA Deposit server.

**Note:** If you are doing a new installation of ARTA Deposit on a supported 64-bit operating system, you will need to begin the installation by double-clicking the **setup64.bat** file from the root of the product CD. Do not use **setup.exe**.

OR

Browse to the Client Folder on the ARTA Deposit server (Example: \\ComputerName\BSIApps\ARTADeposit\Client): double-click **setup.exe** to begin the installation. For 64-bit Operating Systems, you would need to go to Start\Run and run setup.exe with the FOUNDXML switch. (Example: <\\ComputerName\BSIApps\ARTADeposit\Client\Setup.exe> /FOUNDXML)

If during the server installation, you chose the option to **Run client installs in unattended mode**, only the *Computer Restart Required*, *Installing* and *Installation Complete* screens will be displayed.

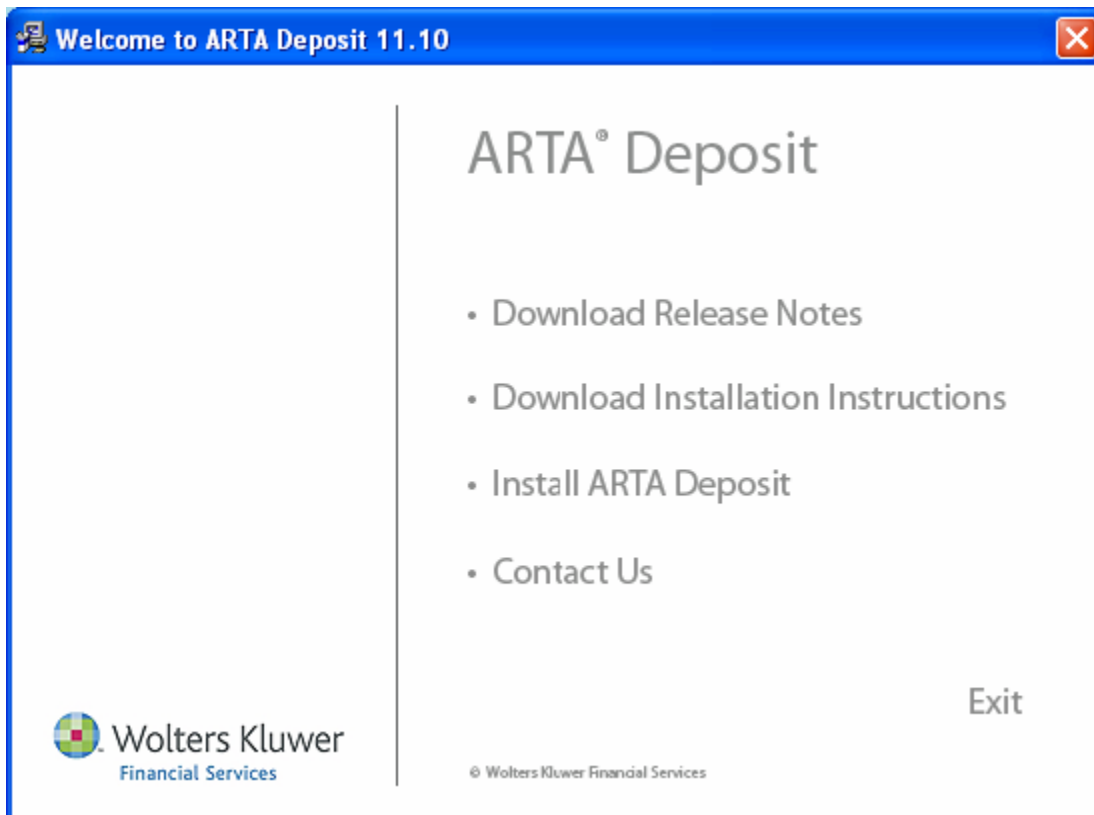
The Setup program will display a series of windows:

### Welcome to ARTA Deposit 2011.1

The Welcome screen provides links to obtain documentation and contact support, as well as begin the installation.

Click **Install ARTA Deposit**.

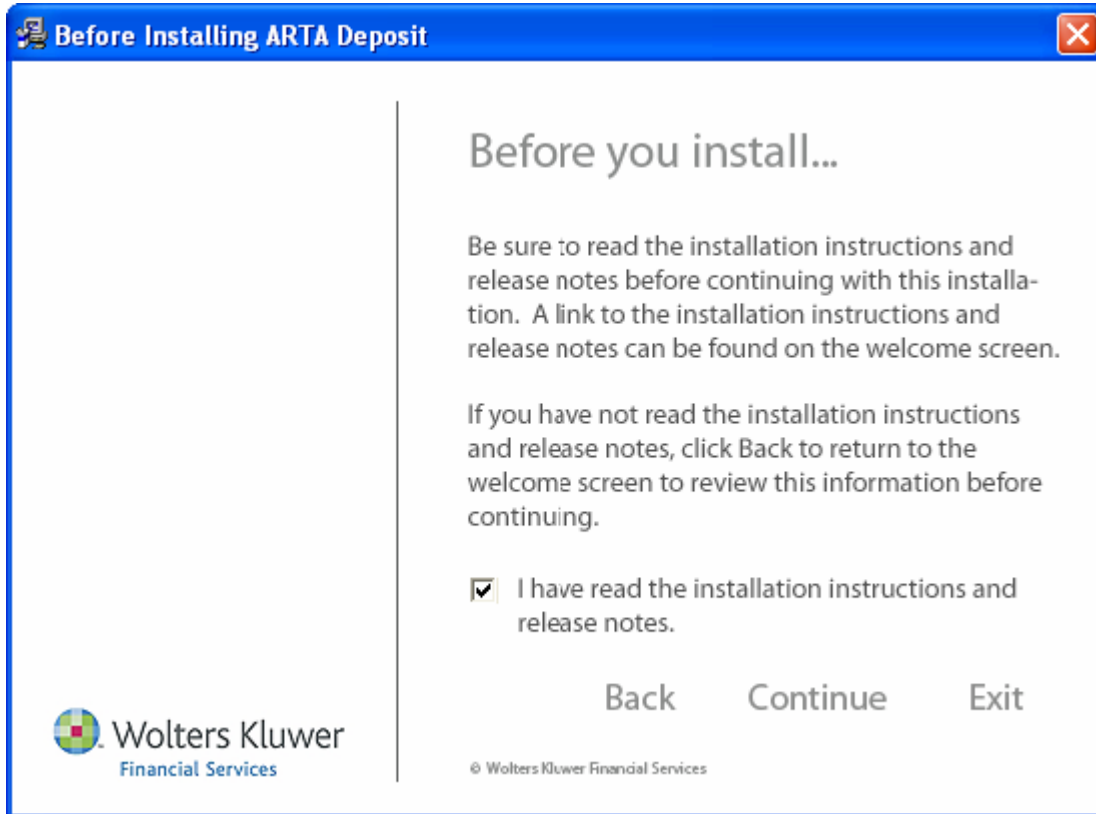
**NOTE:** The ARTA Deposit Installation Instructions and Release Notes are provided on the ARTA Deposit CD-ROM in PDF format.





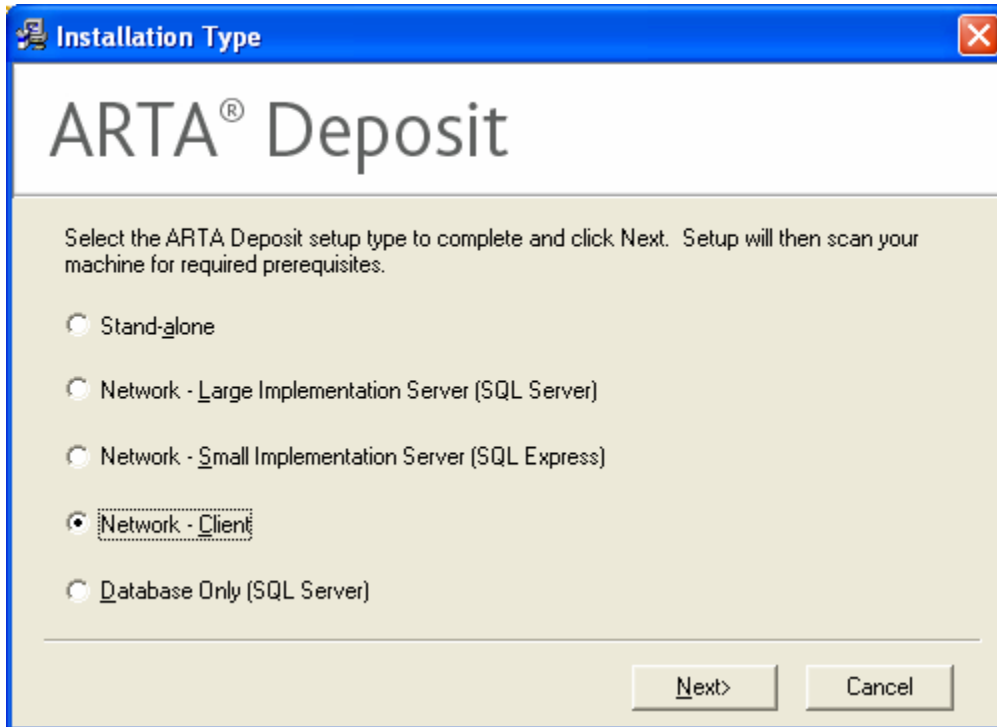
### Before Installing ARTA Deposit (CD-ROM Installation only)

This screen ensures you have received and read the ARTA Deposit documentation. Check the box then click **Continue**.



### Installation Type (CD-ROM Installation only)

This screen will display only on a new installation (i.e., a previous version of ARTA Deposit is not detected) when you are using the ARTA Deposit Version 2011.1 CD-ROM. The stand-alone option is the default for new installations. Select the **Network - Client** option then click **Next** to continue. When updating or reinstalling, the setup program will skip this screen and automatically use the previously entered selection.

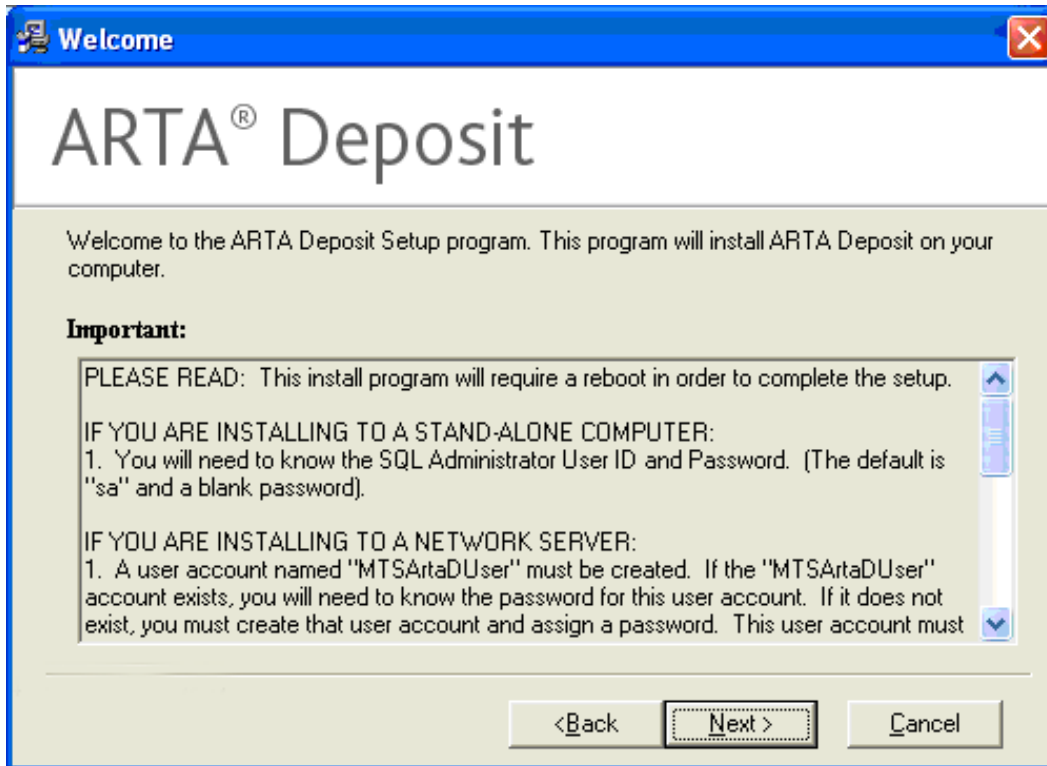


### Program Update (from previous version)

If the setup program detects a previous version of ARTA Deposit already installed, a warning message will appear to be sure that you have backed up all data files. Client installations do not affect the data. Click **Yes** to continue.

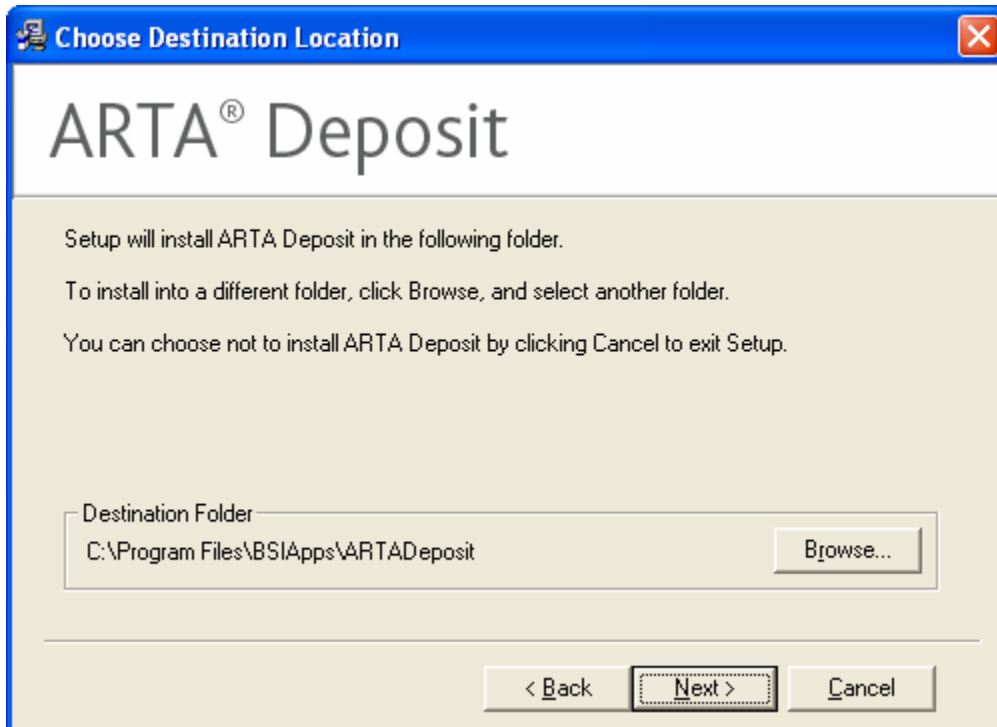
## Welcome

This screen verifies the installation program is ready to begin. After you have read the **Important:** information, click **Next** to continue.



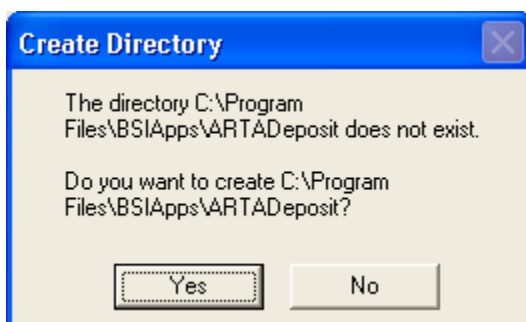
### Choose Destination Location (New installation only)

Confirm the location. The default location is C:\Program Files\BSIApps\ARTADeposit. Click **Next** to continue. This step is necessary only when performing a new installation.



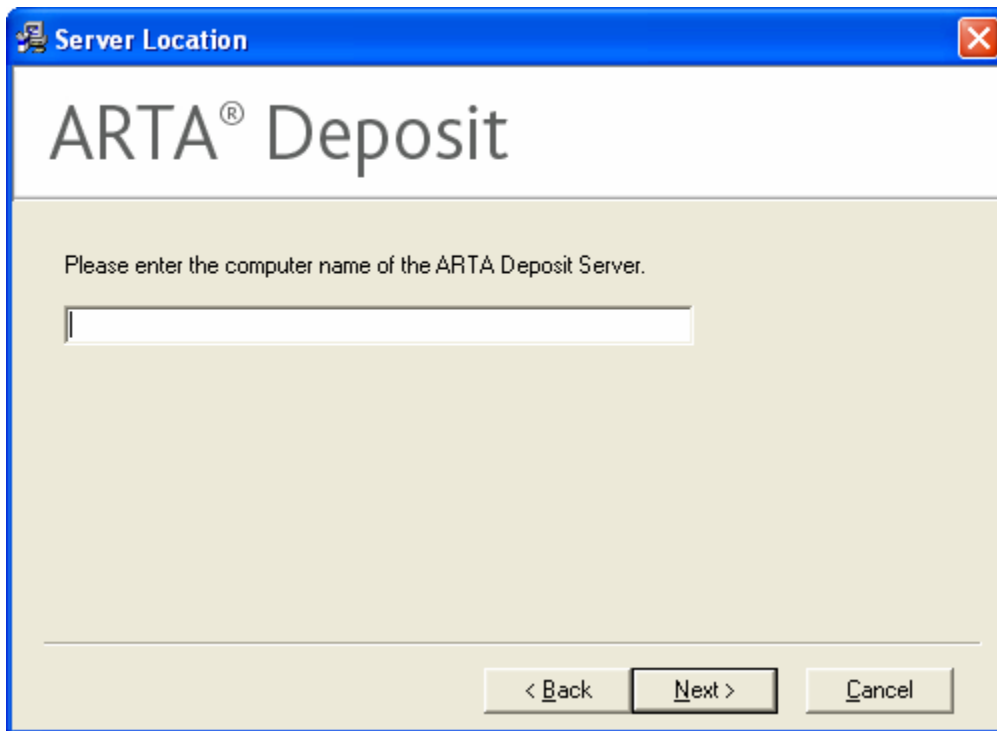
### Create Directory (New Installation Only)

The *Create Directory* dialog box appears if the default destination folder designated on the *Choose Destination Folder* screen does not exist. Click **Yes** to create the destination folder.



## Server Location

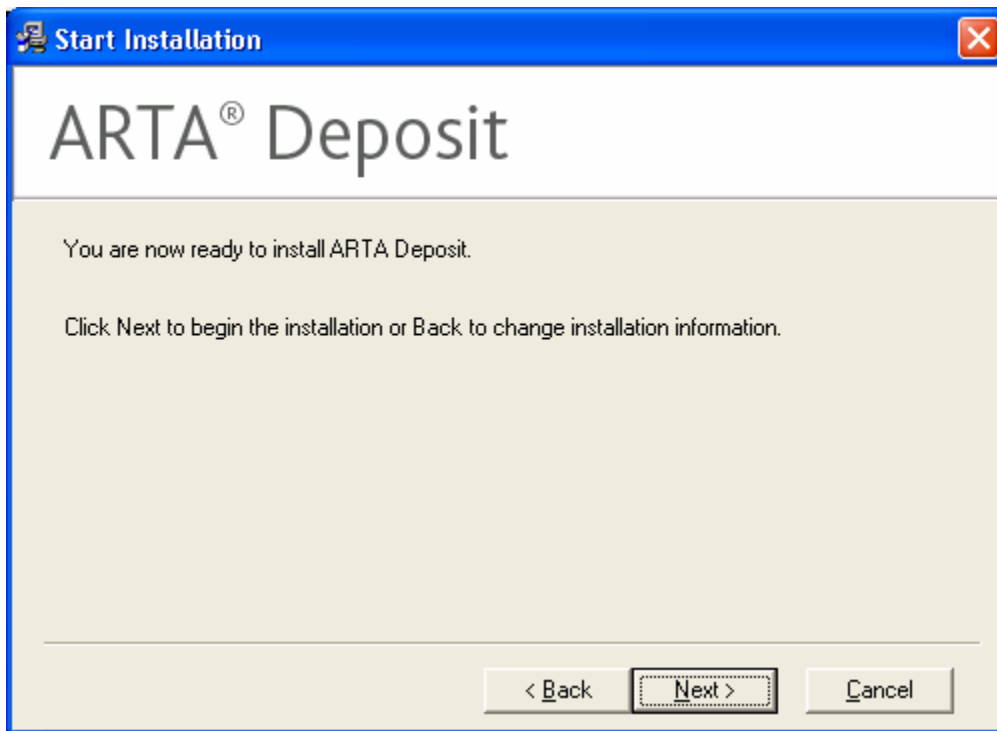
Enter the computer name of the ARTA Deposit server. Click **Next** to continue.



The screenshot shows a Windows-style dialog box titled "Server Location" with a blue header bar. The main area has a white background with the text "ARTA® Deposit" in a large, grey font. Below this, a smaller grey box contains the instruction "Please enter the computer name of the ARTA Deposit Server." and a white text input field. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a darker border.

## Start Installation

Click **Next** to continue.

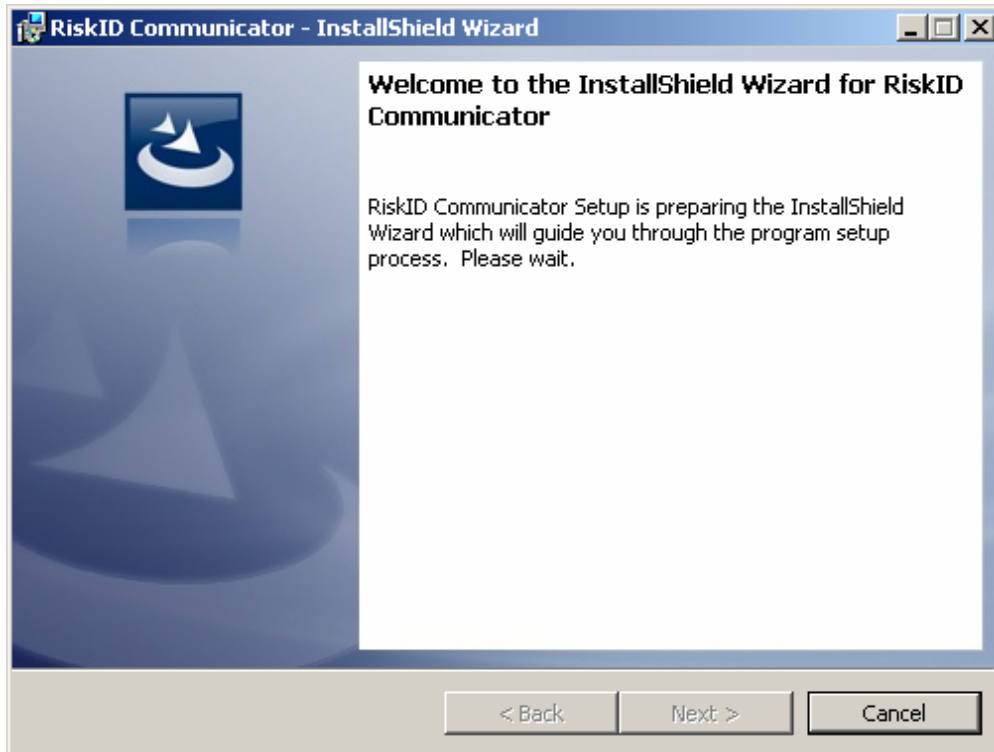


## Computer Restart Required

Click **Yes** to restart the computer. The computer must be restarted to continue the installation routine. After the computer restarts, the ARTA Deposit setup program will continue.

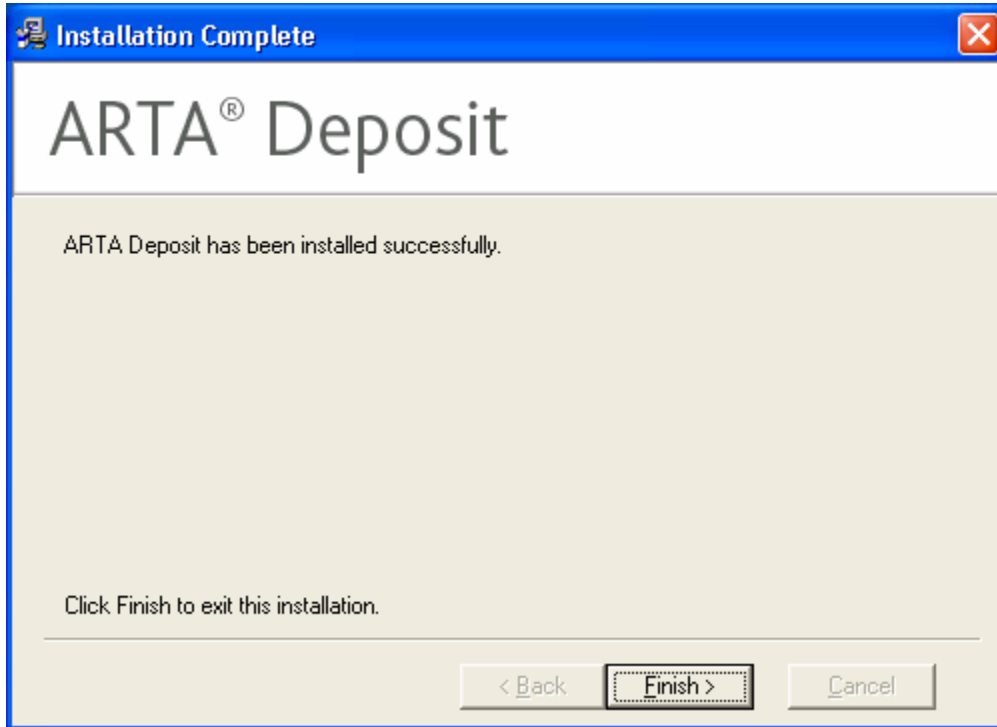


## RiskID Installation



## Installing

A status bar is displayed as ARTA Deposit is installed. Upon completion, the *Installation Complete* screen will appear.



### Document Services

If the setup program has detected the Rembrandt Lending System on this computer, the following message requiring you to run Document\_Services\_Main.exe will display. If you have at least Version 2009.2 of the Rembrandt Lending System installed, you can skip this procedure. If you are running a version of the Rembrandt Lending System prior to 2009.2, [follow these instructions](#) to install the updated Document Services.

**NOTE:** Wolters Kluwer Financial Services no longer supports the Rembrandt Lending System versions prior to Version 2009.2. Updating to a newer version is recommended.

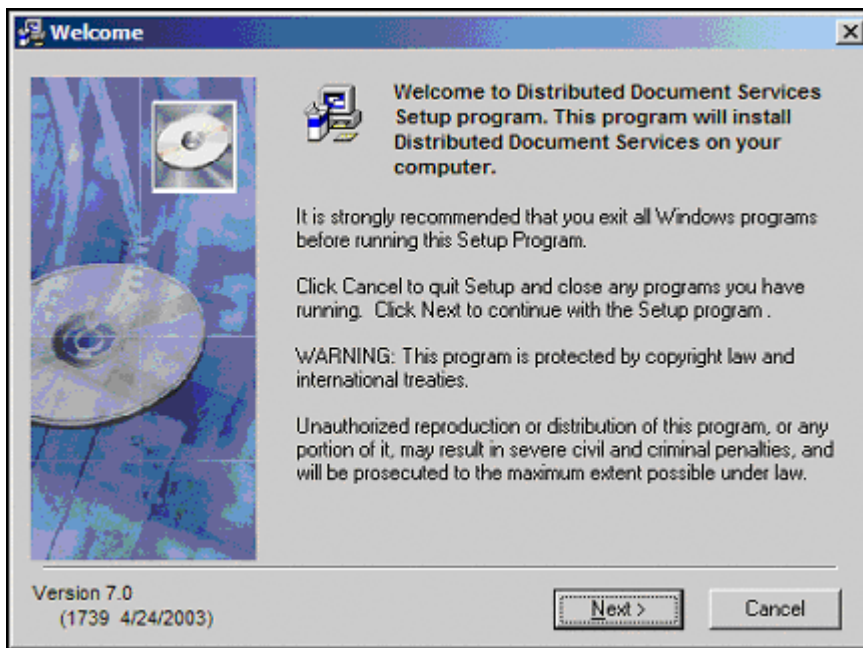


## To run Document\_Services\_Main.exe

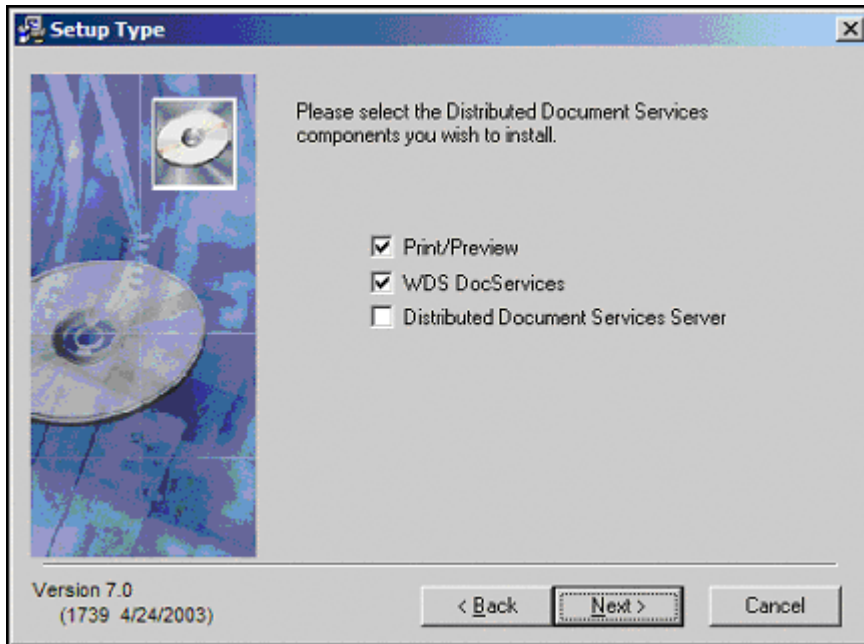
1. Complete the ARTA Deposit Version 2011.1 installation according to this document.

**NOTE:** If installing to a Citrix/Terminal Server, change the server to 'Install Mode' before continuing.

2. Select **Start, Run** from the Windows main menu.
3. Select **Browse** to locate the CD-ROM. Double-click to open the Util folder. The **Document\_Services\_Main.exe** program is located in the Util directory (For example, D:\Util\Document\_Services\_Main.exe).
4. Click **OK** to run the Document Services Main program. The *Welcome* screen will display.



5. Click **Next** to continue. The following *Setup Type* window will display.



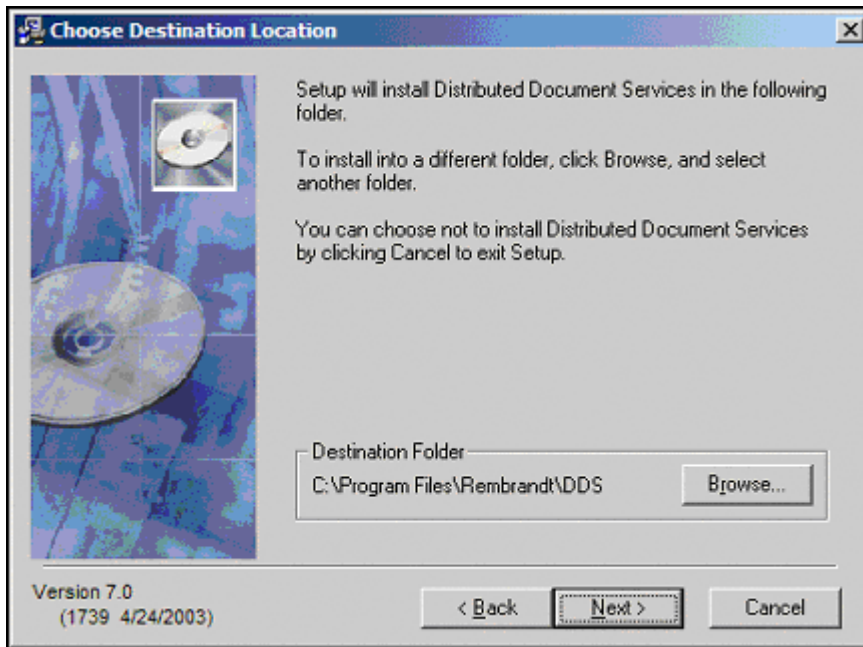
6. If the ARTA Deposit client has been installed on the same computer with the Rembrandt Lending System client installed, the first two options (**Print/Preview** and **WDS DocServices**) default selected.

If the ARTA Deposit client has been installed on the same computer as a server or stand-alone installation of the Rembrandt Lending System, all 3 options (Print/Preview, WDS DocServices, and Distributed Document Services Server) default selected.

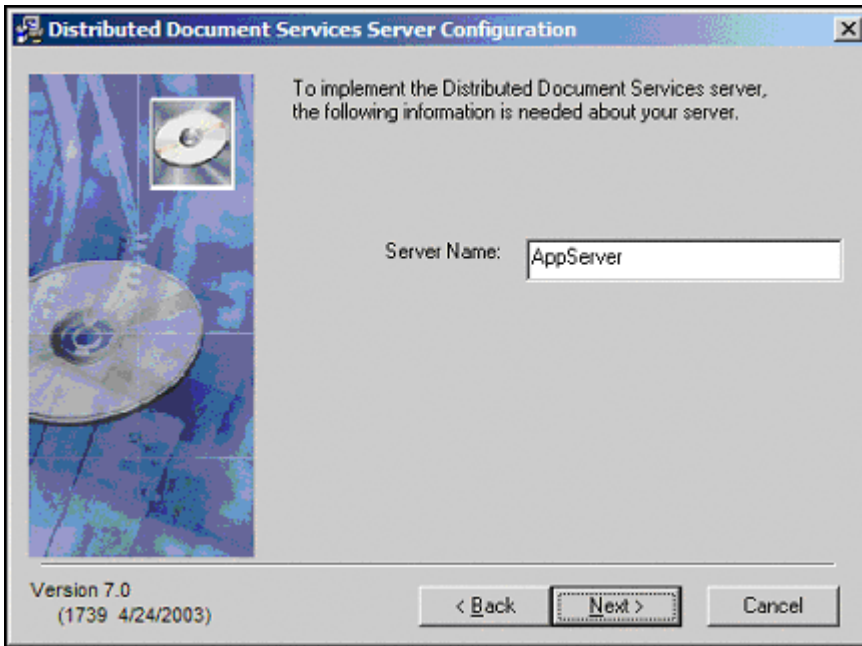
7. Leave the defaulted selections and click **Next** to continue.

8. If the ARTA Deposit client has been installed on a computer with the Rembrandt Lending System client installed proceed to step 9.

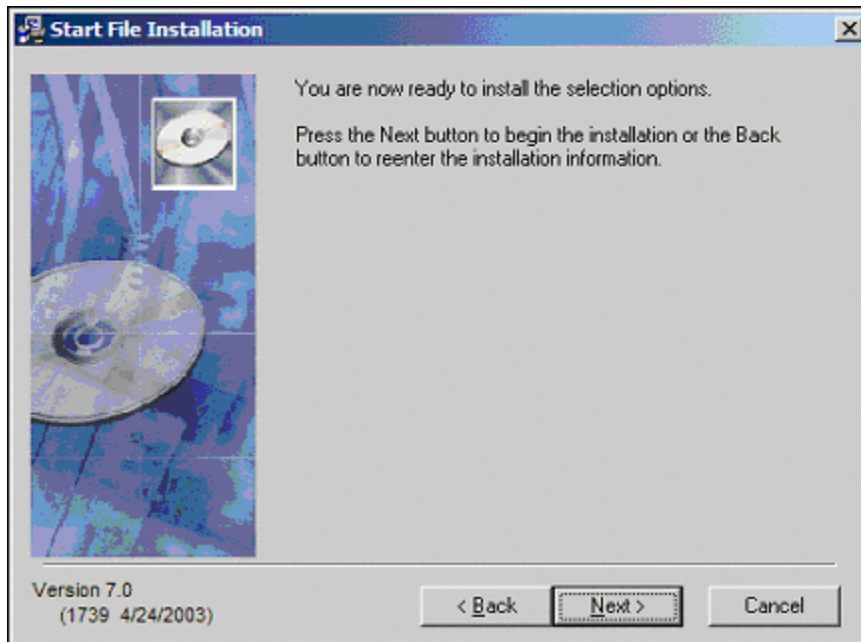
If the ARTA Deposit client has been installed to a server or stand-alone installation of the Rembrandt Lending System, the following screen will display. We recommend you accept the default by clicking the **Next** button. However, you may designate a specific location by using the Browse option.



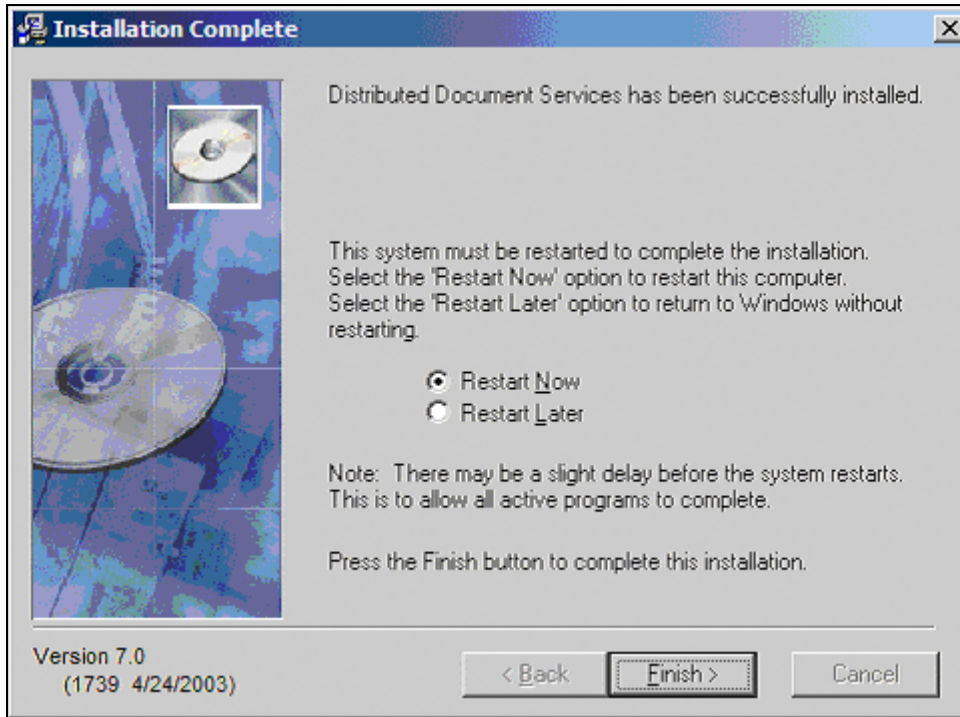
9. Verify the Rembrandt server/stand-alone name and click **Next**.



10. The *Start File Installation* screen (below) will display. Click **Next** to begin the installation.



11. During the installation, a series of screens will display. Upon receiving the *Installation Complete* screen (below) select **Restart Now** and click **Finish** to complete the installation.



## Installation Complete

Click **Finish** to close the installation program.

After the installation is complete, continue to [Next Steps](#) section.

## Next Steps

After ARTA Deposit is installed, continue with the following:

### Reboot

With the completion of any new software installation, it is a good practice to reboot your computer. We suggest you do this to each computer on which you installed ARTA Deposit.

### Windows Server 2003 & XP Permissions

If you have ARTA Deposit installed on a computer formatted to use the NT file system (NTFS) additional security settings are needed. You should involve your network administrator or technical specialist if you are uncomfortable or unfamiliar with Windows security settings. Examples of Windows operating systems that use NTFS are: Windows XP Professional and Windows Server 2003.

### App Pool Configuration for 64-Bit Operating Systems Only

Before using ARTA Deposit, you will need to configure the app pool portion of Internet Information Services.

1. From Start, Run, type **inetmgr** which opens the management console for IIS.
2. Expand to find the Application Pools.
3. Right-click **DefaultAppPool** and choose **Advanced Settings**.
4. Change **Enable 32-Bit Applications** to **True**.
5. Close the management console.

If IIS is hosting other content along with ARTA Deposit, another Application Pool could be created for ARTA Deposit.

1. From Start, Run, type **inetmgr** which opens the management console for IIS.
2. Expand to find the Application Pools.
3. Click **Add Application Pool...**
4. Type in **ARTADAppPool** for the name. Click OK.
5. Right-click ARTADAppPool and choose **Advanced Settings**.
6. Change **Enable 32-Bit Applications** to **True**.
7. Expand **Default Web Site**.
8. Select the ARTADeposit Virtual Directory. (Do WBI as well)

9. Click **Basic Settings**.
10. Click **Select** for the Application Pool and choose **ARTADAppPool**. Click **OK**.
11. Close the management console.

## Windows Server 2008/Vista/Windows 7 Permissions

### Adding Permissions

See [Appendix B: Windows Server 2008](#) for more information.

## ARTA Deposit Client Installations

On all ARTA Deposit installations, users must be granted permission to the ARTADeposit program folder and all sub-folders. Failing to do so may produce errors in the program. This can be accomplished easily by granting the group Everyone full control to the ARTADeposit program folder and all sub-folders.

## ARTA Deposit Server installations

On all ARTA Deposit installations, users must be granted permission to the ARTADeposit program folder and all sub-folders. Also, users must be granted permissions to the C:\Documents and Settings\All Users\WoltersKluwer folder and sub-folders. Failing to do so may produce errors in the program. This can be accomplished by granting the group **Everyone** full control to the ARTADeposit program and WoltersKluwer folder and all sub-folders.

### Summary:

ARTA Deposit Server installations:

**Everyone** = Full Control

**IUSR\_computername** = Full Control

All ARTA Deposit installations:

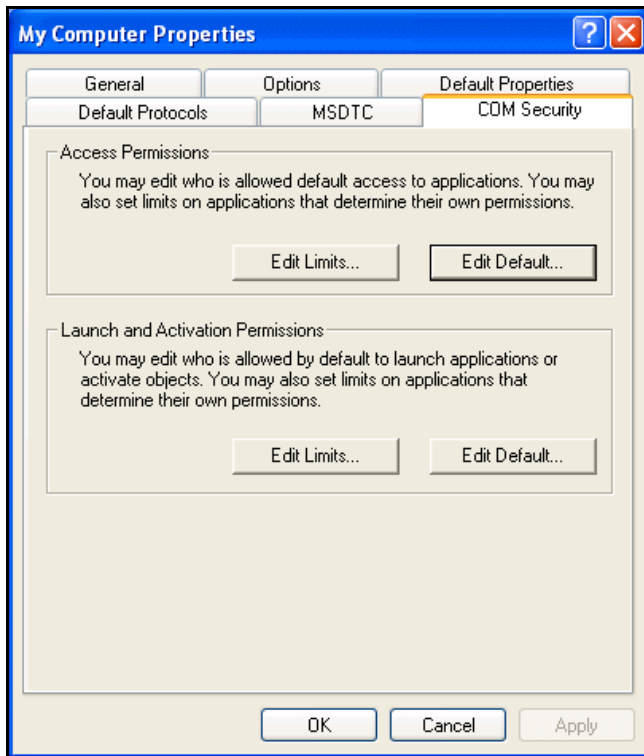
**Everyone** = Full Control

### At the ARTA Deposit application server

The IUSR will not be included in the Default Launch permissions in COM and will need to be added manually by the institution. To do so, complete the following steps.

1. From the **Start** menu, select **Run**.
2. Enter "dcomcnfg" and click **OK**.
3. If prompted to write to the registry, click **Yes**.
4. Expand **Component Services** and **Computers**.
5. Select **My Computer**.

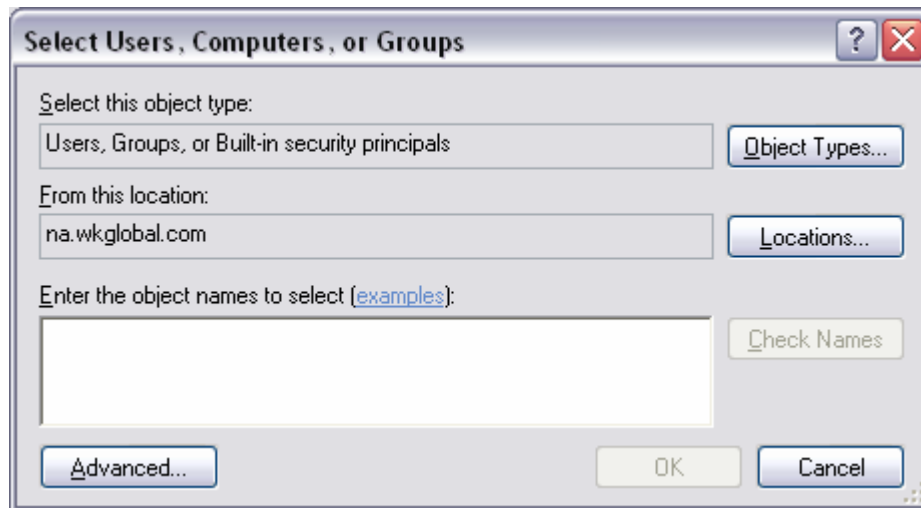
6. Right-click the **My Computer** in the left pane and select **Properties**.
7. Select the **COM Security** tab.



8. In the **Launch and Activation Permissions** frame, click **Edit Default...**
9. Verify that (at least) the **Interactive** group and the **Internet Guest Account (IUSR)** are listed.

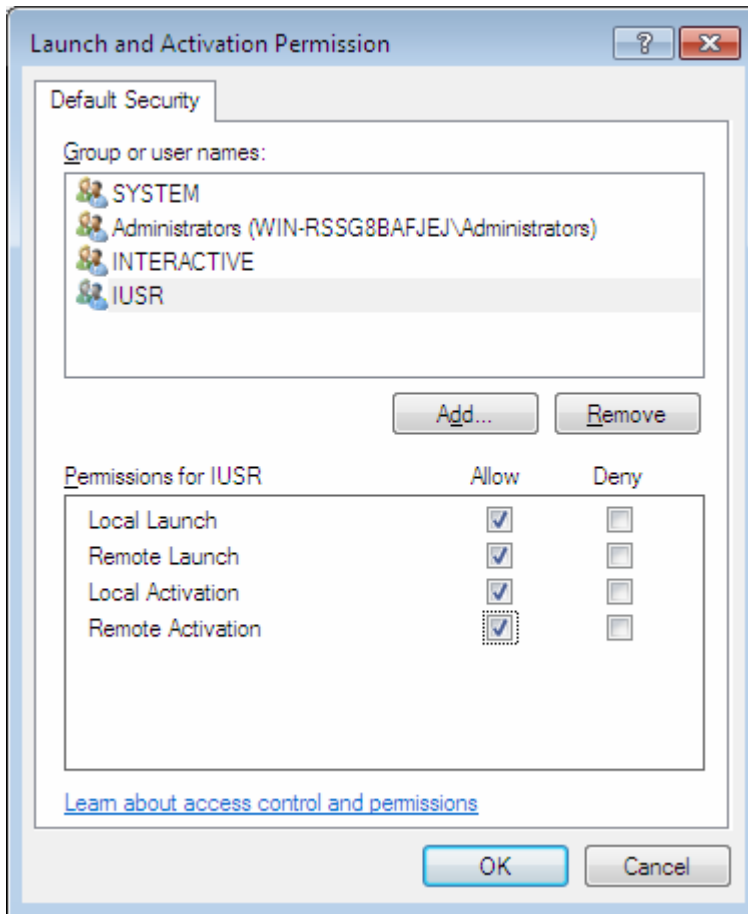
If the **Interactive** group and the **Internet Guest Account (IUSR)** are not listed, click **Add...** and proceed to the next step.

If the **Interactive** group and the **Internet Guest Account (IUSR)** are listed, skip to step 16 (below).



10. If the local computer name is not displayed in *From this location*, click **Locations**. If the local computer name is displayed, skip to step 11.
11. Select the local computer, (The local computer will display a computer icon in front of the name, as shown above). And click **OK**.
12. Click **Advanced...**
13. Click **Find Now**.
14. Select the missing account(s) i.e. IUSR or IUSR Computername. If multiple accounts need to be added, hold down the **Ctrl** key on the keyboard and select each individual account.

15. Click **OK**.



16. Verify that each account has at least **Local Launch** and **Local Activation** selected under **Allow**.

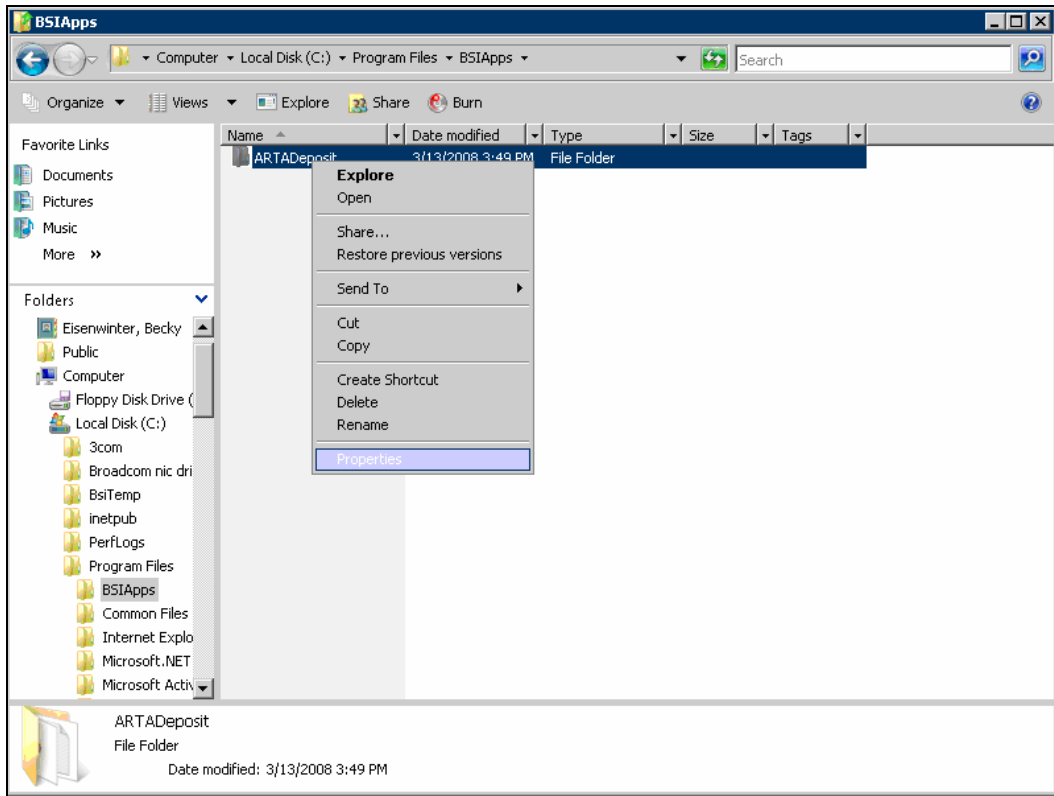
17. Click **OK** to close all pages and return to **Component Services**.

18. Close **Component Services**.

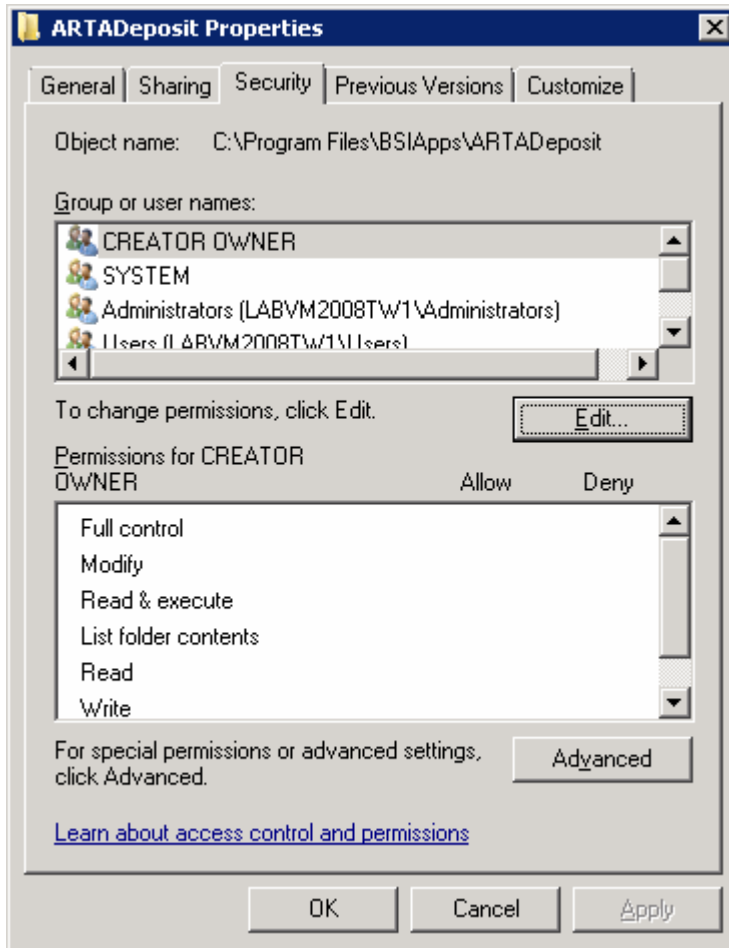
## Windows 2008 Server

### Adding an IIS User

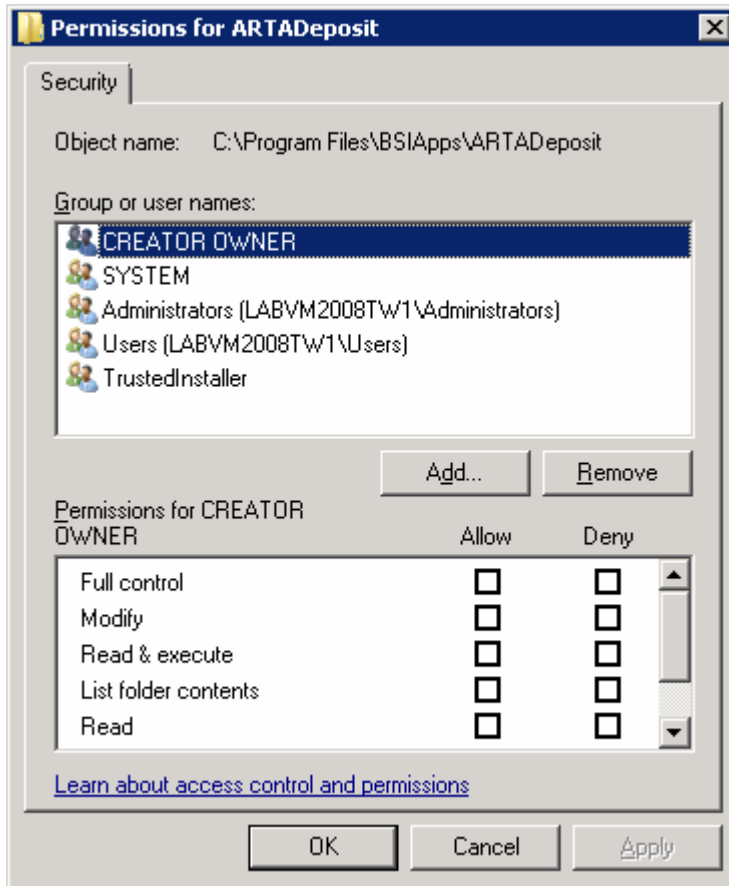
1. Browse to the folder where the ARTA Deposit installation is located.
2. Right-click the ARTA Deposit file name; click **Properties**.



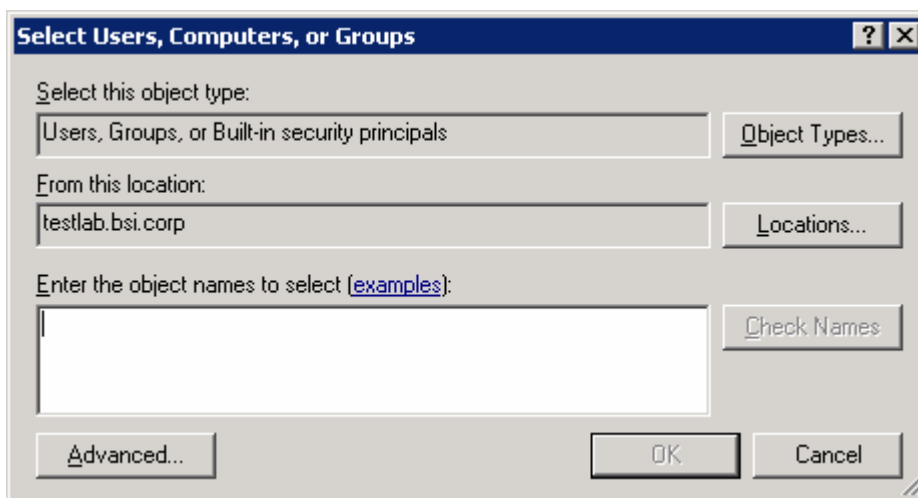
3. The **ARTADeposit Properties** dialog box appears. On the **Security** tab, click **Edit**.



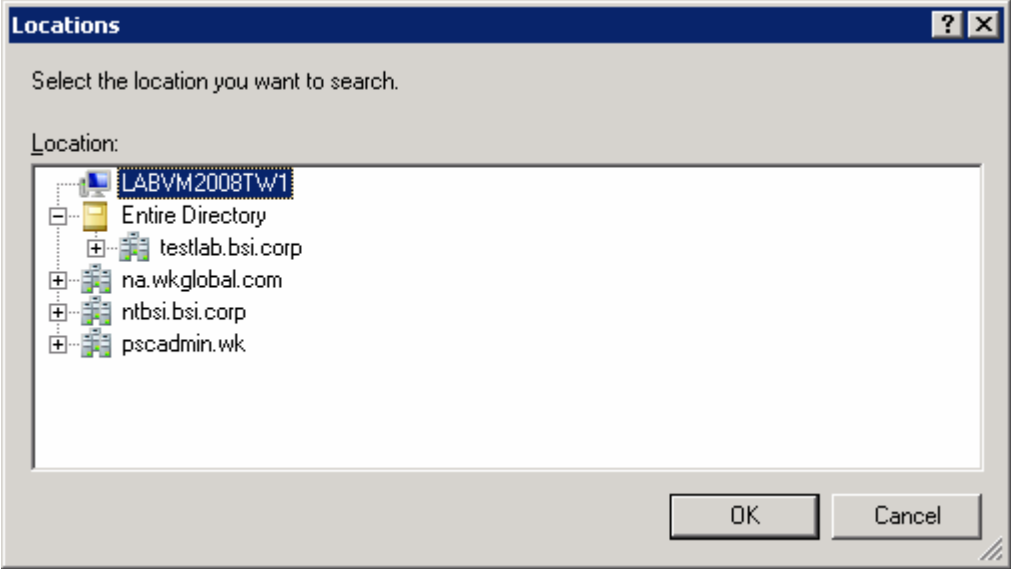
4. The **Permissions for ARTADeposit** dialog box appears. Click **Add**.



5. The **Select Users, Computers, or Groups** dialog box appears. Click the **Locations...** button.

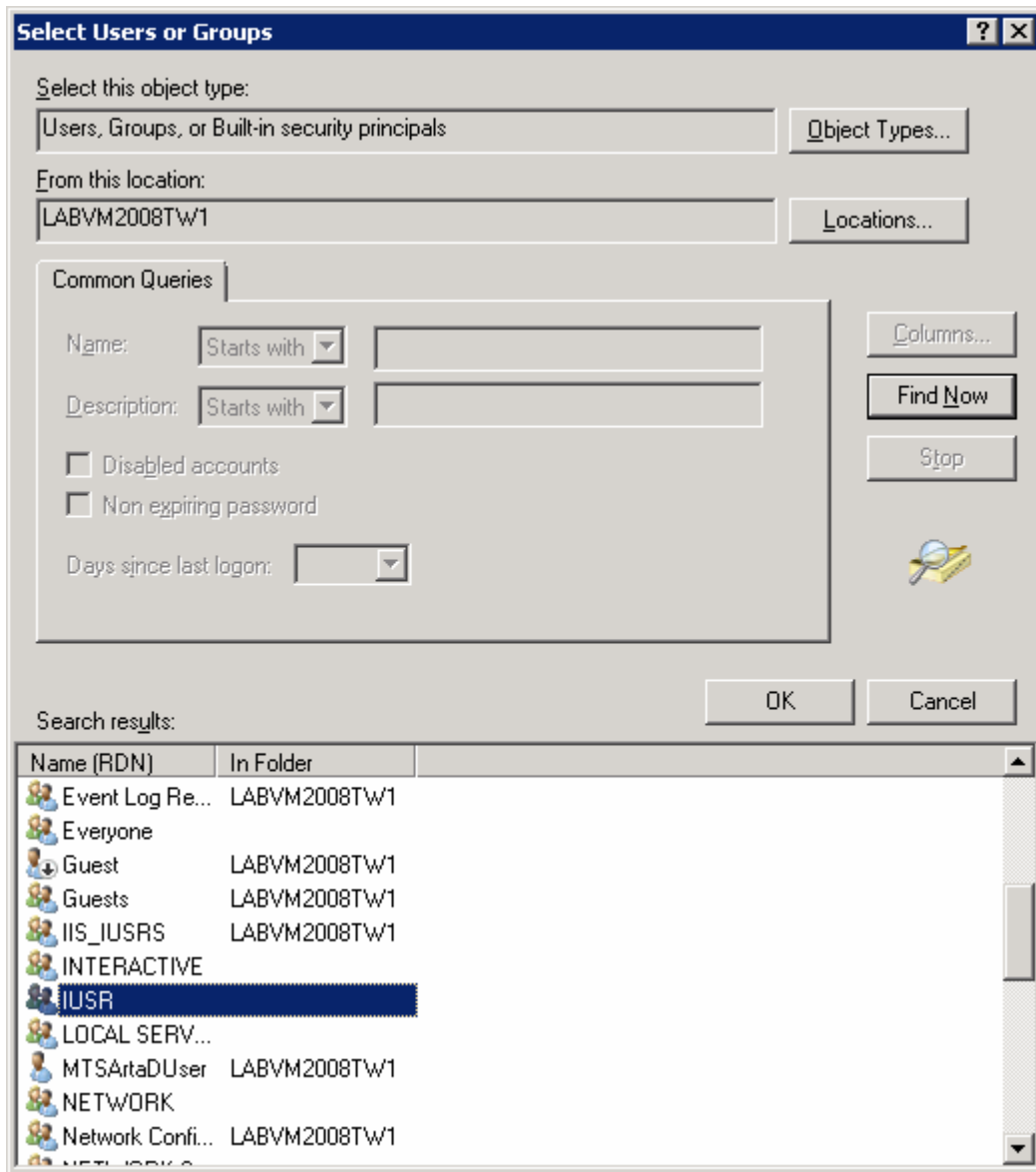


6. On the *Locations* screen, locate and select the desired computer. Click **OK**.



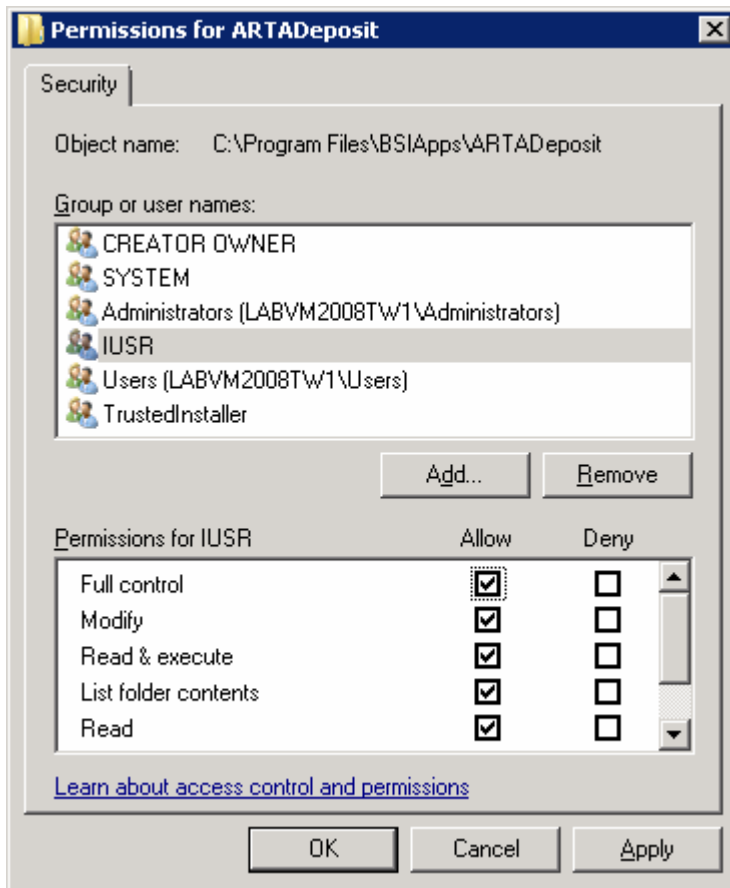
7. The **Select Users or Groups** dialog appears. Click the **Advanced...** button.

**NOTE:** If the user is unable to locate the desired computer, enter as much of the computer name and/or description as is known in the **Name** and/or **Description** text boxes in the **Select Users or Groups** dialog box. Click the **Find Now** button.



8. Select **IUSR**. Click **OK**.

9. The *Permissions for ARTADeposit* screen appears; select the desired user. In the **Permissions for IUSR** frame, click the checkbox next to the desired permissions.



10. Click **Apply**; click **OK** twice.

## Prepare for Institution Setup

Before setting up the ARTA Deposit Documentation System for your institution, gather all the information you need to fully integrate ARTA Deposit into your operations. Refer to the ARTA Deposit *User's Guide* for more details.

## Default Login

The default login information for ARTA Deposit is:

**User ID:** Supervisor

**Password:** Password

We recommend a supervisor establish user security as soon as possible.

The user that logs into ARTA Deposit should be made a member of their Local Administrators group.

## Plan Data Backups

Before you use ARTA Deposit, plan your data backup and system maintenance strategies. If your computer system is equipped with backup and archiving utilities, you will need to understand these systems for proper integration with ARTA Deposit.

We recommend you set up a frequent, routine data backup program to make sure your ARTA Deposit data files are always protected. See *ARTA Deposit Version 2011.1 Release Notes* for more information.

## Deluxe Certificate Settings

As of ARTA Deposit Version 7.0 users can connect instantly to DeluxePort™ Plus, Deluxe's online check/share draft ordering and account verification solution. This connection is FREE to all ARTA Deposit users. As part of the setup process, Deluxe issues a digital certificate that allows ARTA Deposit and Deluxe to communicate or recognize each other. This certificate must be exported from its original location, then imported to a new location in order for this recognition to occur and have the integration work properly.

It is suggested that your network administrator complete the required export and import of the digital certificate, as detailed below.

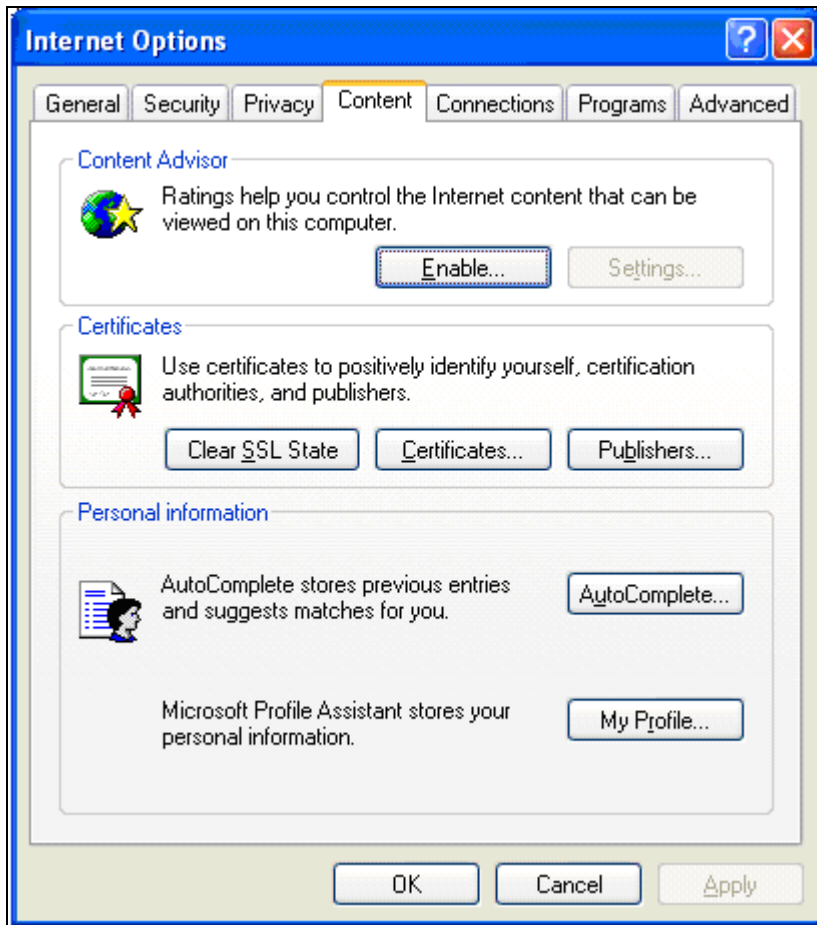
When you install the digital certificate from Deluxe's Web site, by default, the digital certificate is automatically placed directly into the web browser's Content file of the machine that installed it. The digital certificate then needs to be exported to a network location so that all client machines that require access to DeluxePort™ Plus can access a copy of the digital certificate.

**NOTE:** The digital certificate should only be exported to a network location once by the user who installs the digital certificate from Deluxe's Web site. All other users who wish to utilize the DeluxePort™ Plus integration only need to complete the import to a local workstation, as instructed below. Prior to importing the digital certificate you must be logged in as the user who will be using (running) ARTA Deposit or the digital certificate will not be associated with the correct user account.

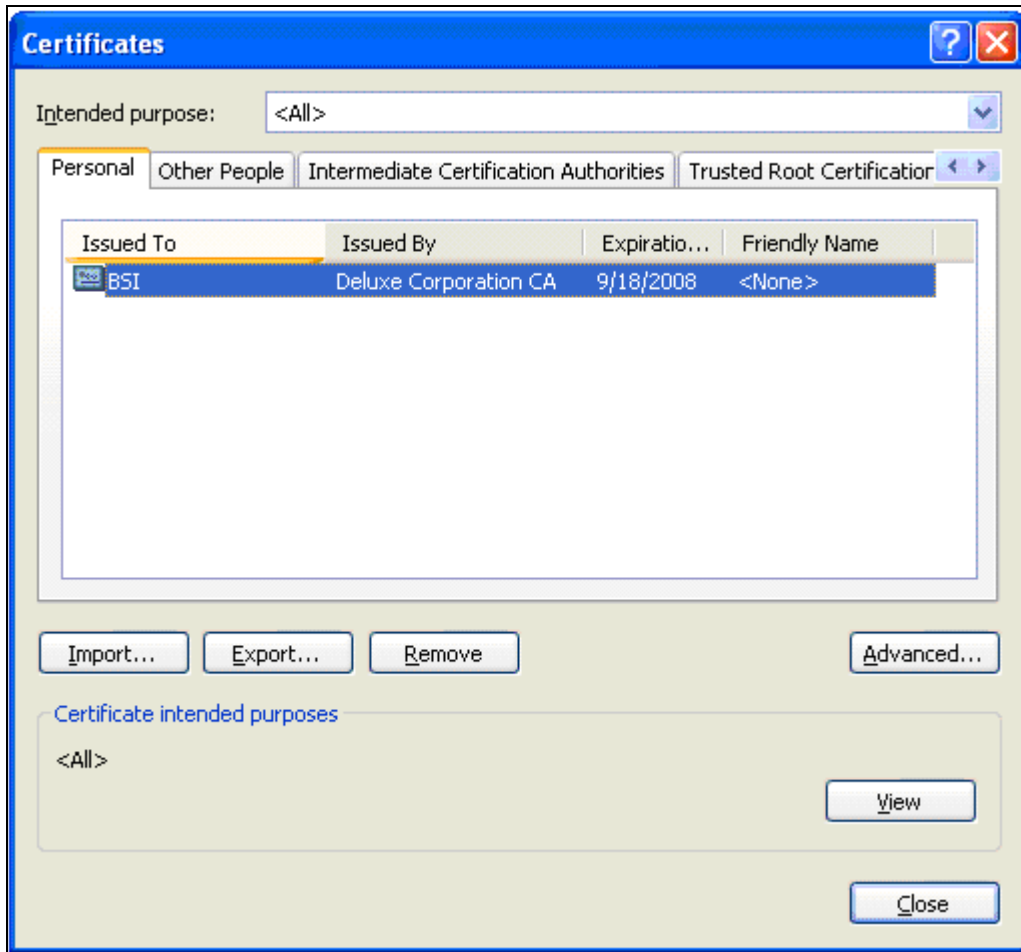
## Exporting the Digital Certificate

Complete the following steps to export the digital certificate from the Content file. This export only needs to be completed once, regardless of the configuration.

1. In Internet Explorer, open the **Tools** menu and select **Internet Options...**
2. Click the **Content** tab, then click the **Certificates...** button in the **Certificates** frame.

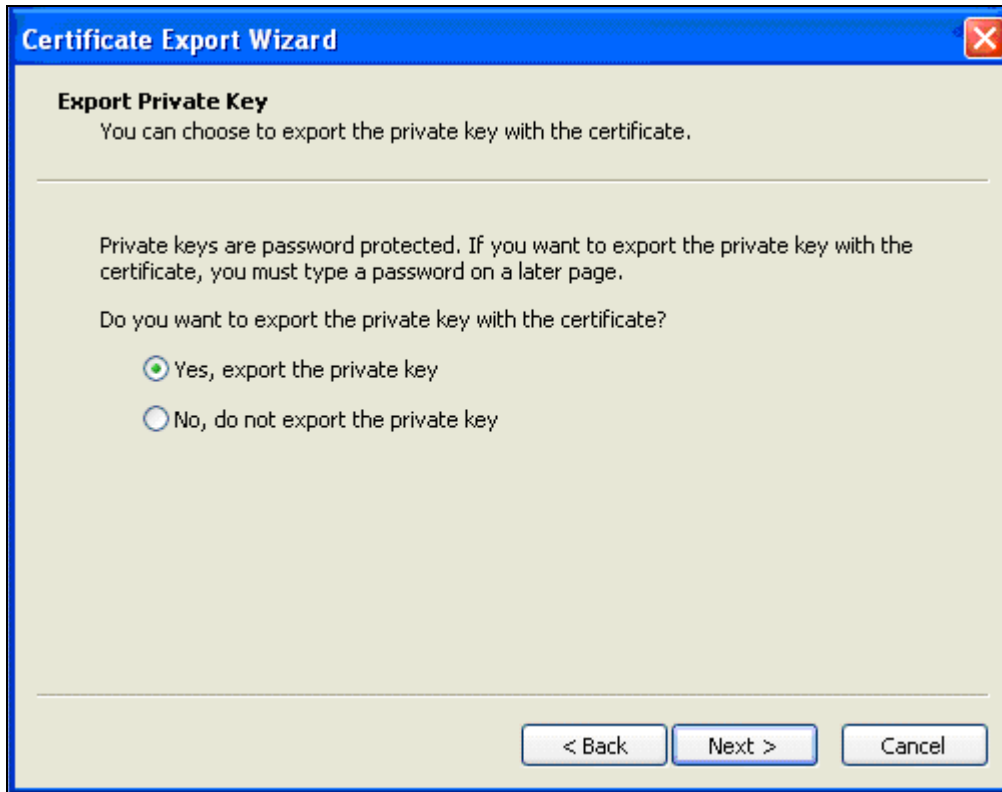


3. Select the digital certificate issued by Deluxe Corporation then click **Export...**

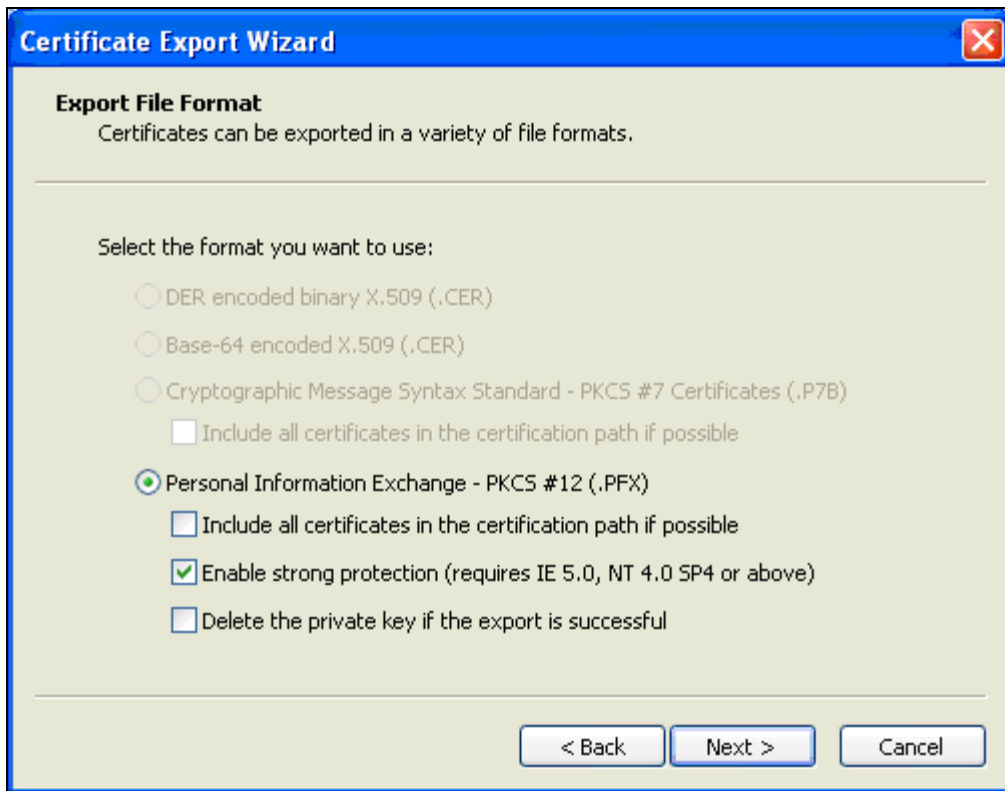


4. The **Export Wizard** will appear. Click **Next >** to continue with the Wizard.

5. Select **Yes, export the private key** on the *Export Private Key* screen and click **Next >**.

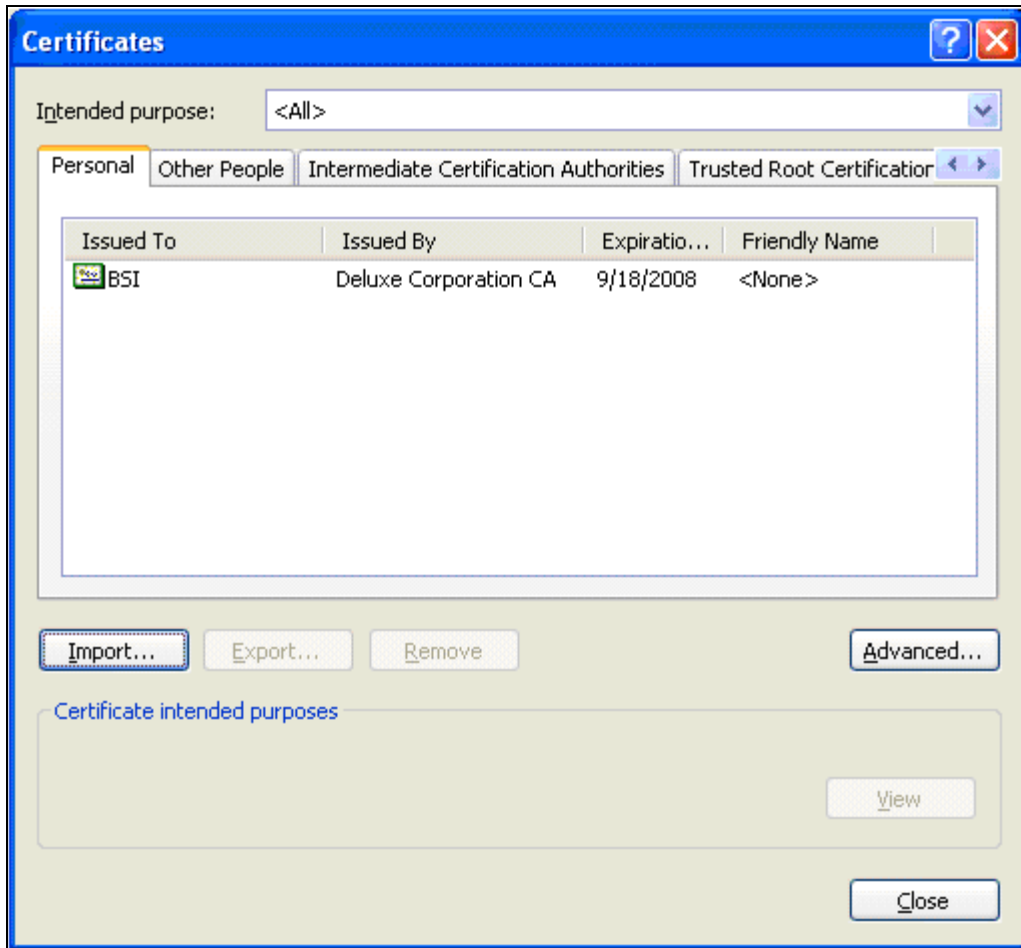


6. Select **Personal Information Exchange - PKCS #12 (.PFX)** and check **Enable strong protection (requires IE 5.0, NT 4.0 SP4 or above)**.



7. Enter a password for the digital certificate, confirm the password, and click **Next >**. Remember this password as it is required during the digital certificate import process.
8. Click the **Browse...** button and navigate to the directory to which the digital certificate will get exported. Enter a file name for the digital certificate and click **Save**. No particular file name is required for this step. Click **Next >** after the file is saved.

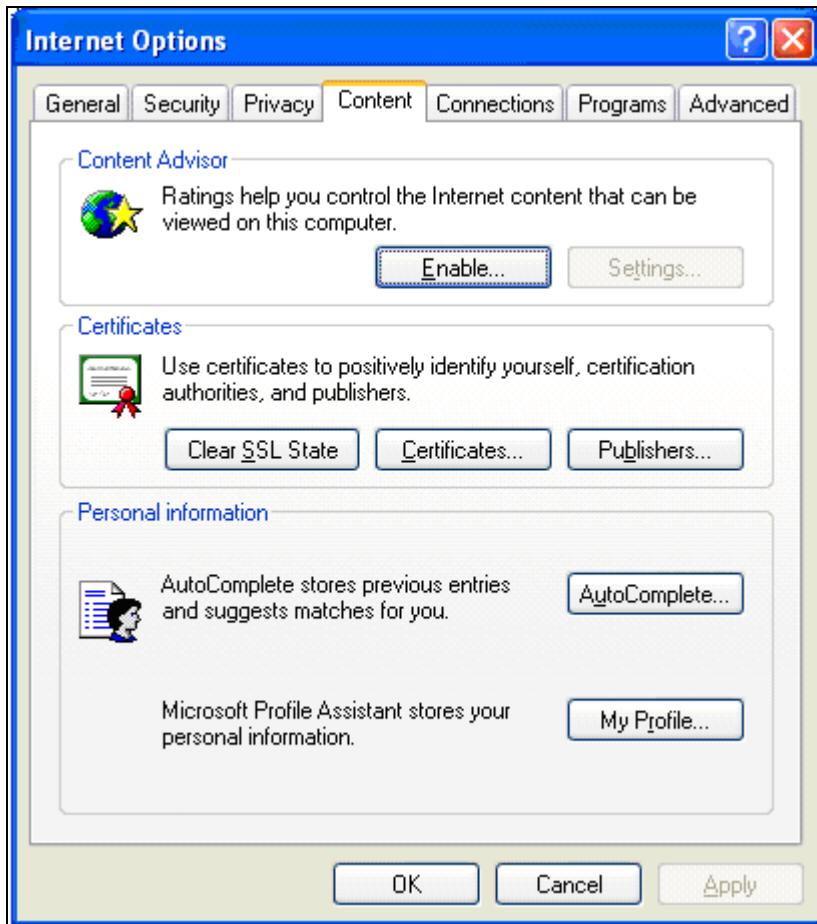
9. Click **Finish**, **OK**, then **Close** to complete the export process and close the **Certificates** dialog box. Click **OK** to close the **Internet Options** dialog box.



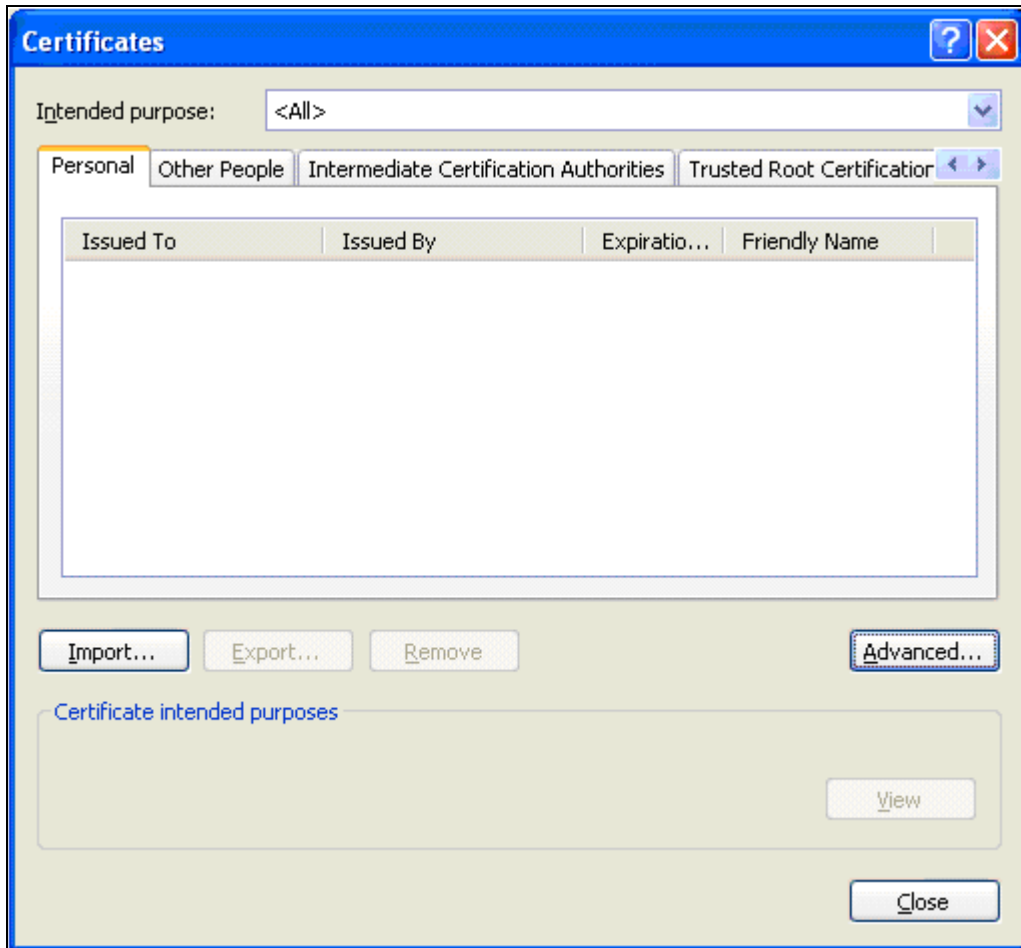
## Importing the Digital Certificate

Complete the following steps for each workstation (stand-alone, server, and client) that will be utilizing the Deluxe feature.

1. In Internet Explorer, open the **Tools** menu and select **Internet Options...**
2. Click the **Content** tab; click the **Certificates...** button in the *Certificates* frame.

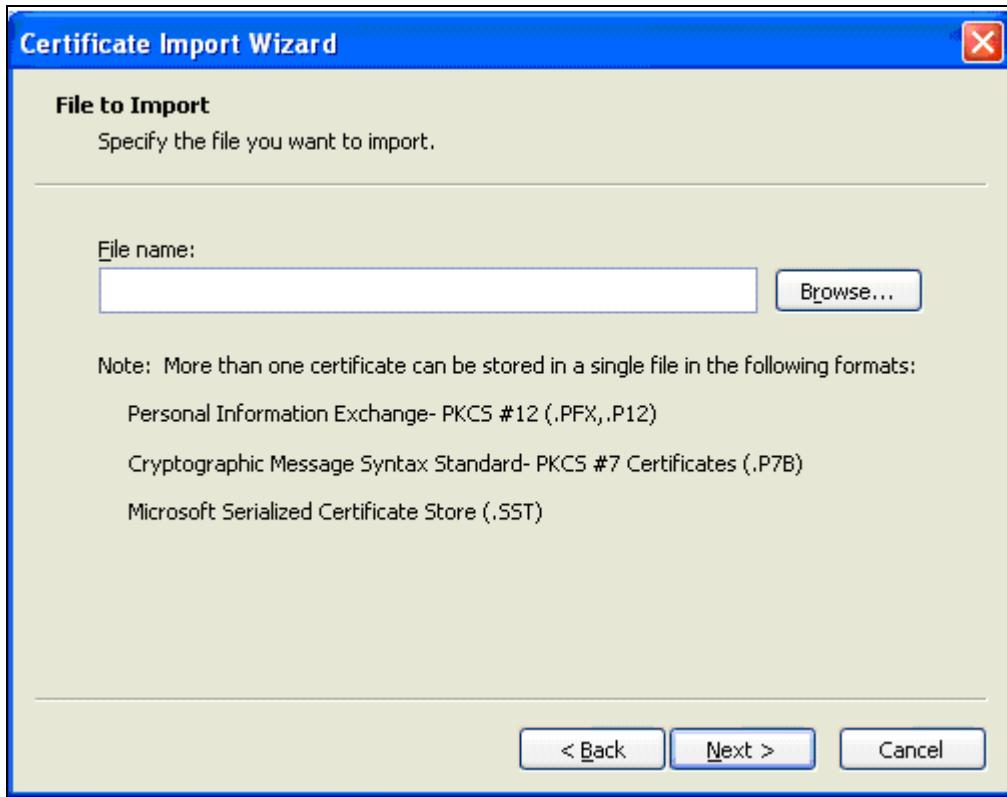


3. Click the **Import...** button.

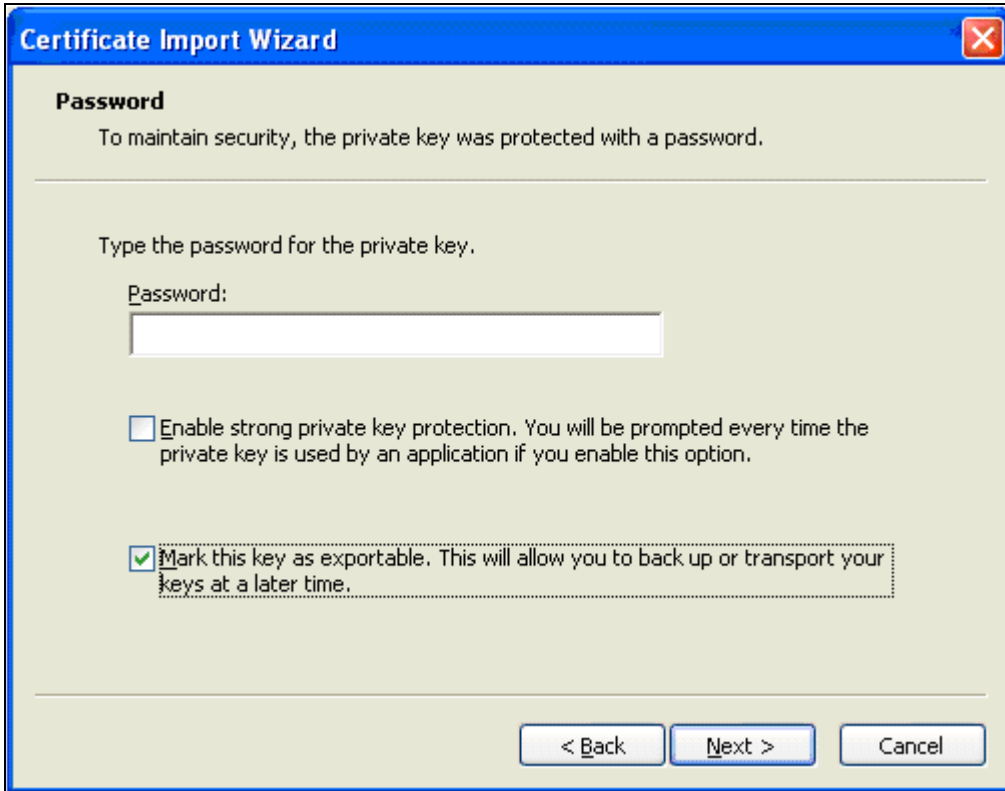


4. The **Export Wizard** will appear. Click **Next >** to continue with the Wizard.

5. Click **Browse...**, navigate to the directory where the digital certificate resides, as saved in Step 8 of the Export procedure above. In the **Files of type:** list box, select **Personal Information Exchange (\*.pfx;\*.p12)**, then select the certificate to import and click **Open**. Click **Next >**.

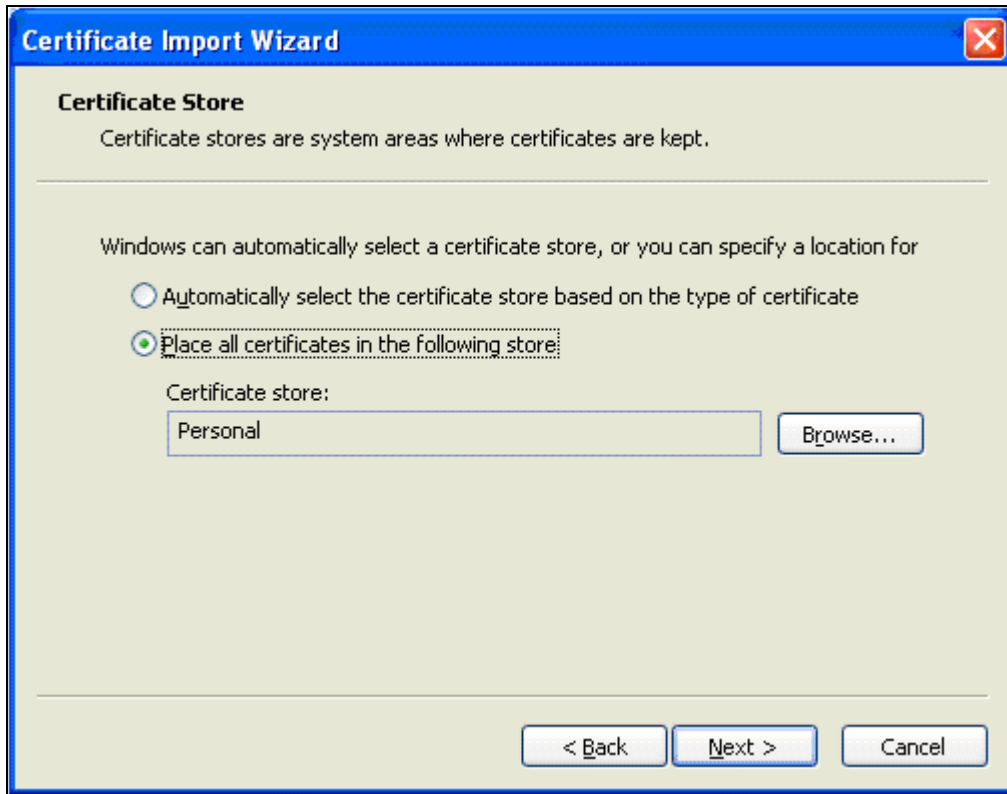


6. Check the **Mark this key as exportable...** check box; enter the password assigned in Step 7 or the Export procedure above. Click **Next >**.



The image shows a Windows-style dialog box titled "Certificate Import Wizard". The title bar is blue with a red close button on the right. The main area has a light beige background. At the top, the word "Password" is written in bold. Below it, a line of text reads: "To maintain security, the private key was protected with a password." A horizontal line separates this from the next section. The text "Type the password for the private key." is followed by a label "Password:" and an empty text input field. Below the input field, there are two checkboxes. The first checkbox is unchecked and is followed by the text: "Enable strong private key protection. You will be prompted every time the private key is used by an application if you enable this option." The second checkbox is checked and is followed by the text: "Mark this key as exportable. This will allow you to back up or transport your keys at a later time." At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

7. Select **Place all certificates in the following store** and click **Next >**.



8. Click **Finish**, **OK**, and **Close** to complete the import process and have the imported digital certificate appear as an issued certificate within the **Personal** tab.
9. Click **Close** and **OK** to close out as needed.

## Increasing ASP Request Size in IIS

Starting in Windows Server 2003 Microsoft decreased the default value for the maximum size of ASP requests allowed by Internet Information Services (IIS). This can lead to errors with the message "The ARTA Deposit Server failed to perform server request" on some types of transactions. This has been known to occur most frequently when using products that contain more than 5 support documents. We recommend you make the configuration change outlined below even if you have not experienced this issue to prevent it from occurring in the future.

This issue should not occur if Windows XP is the server. The configuration change for newer operating systems depends on which operating system is acting as the ARTA Deposit server. This only applies to the computer acting as the server and not the client computers.

## Windows Server 2003

There is no graphical interface to make the required changes in Windows Server 2003 so we provided a script. The script along with instructions is available at the software support website in the following location <http://support.wolterskluwerfs.com/AD2003>:

1. Select **Log in** from the upper right corner.
2. Enter your **User Name** and **Password**; click **Log In**.

**NOTE:** If you do not yet have a User Name for the secured sections of the web site, you may register online by clicking **Register**.

You must have your current customer number to register.

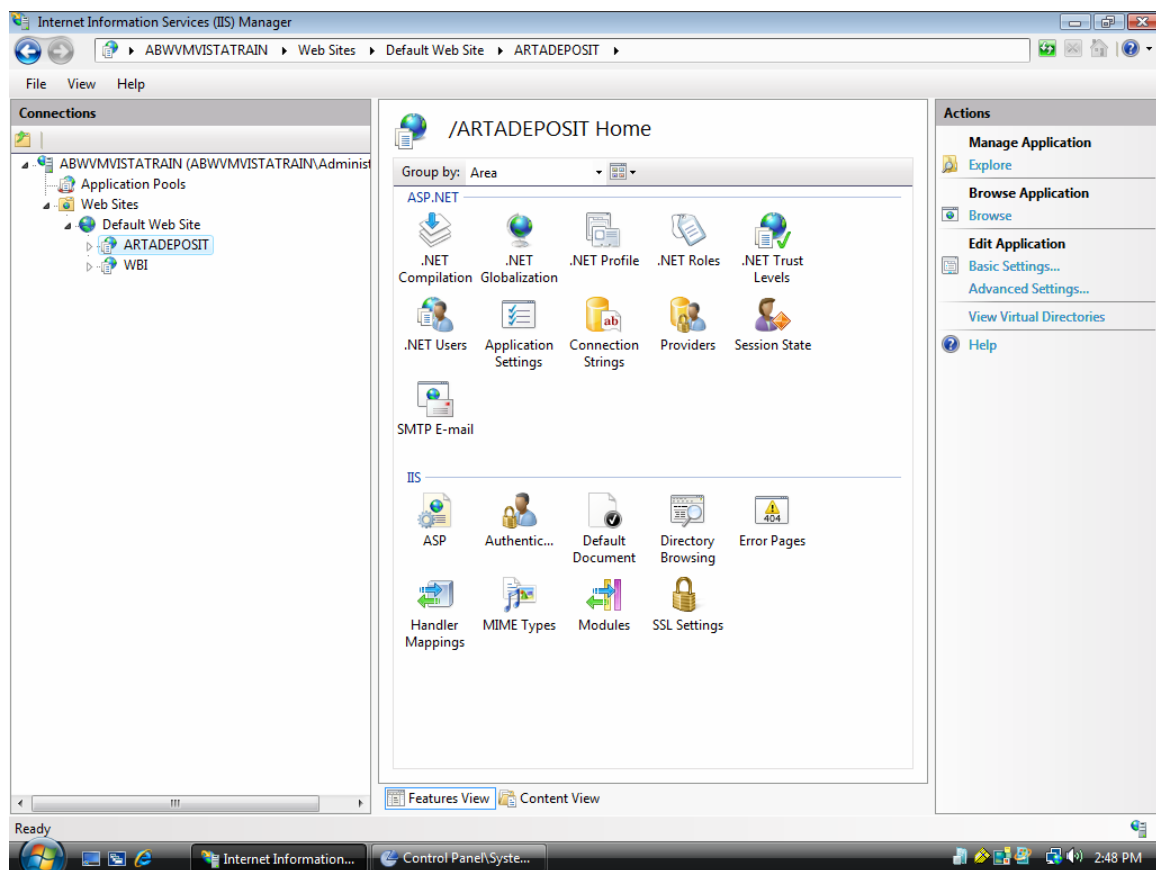
3. Select **Downloads**.
4. Select **ARTA Deposit**.
5. Locate and select the **Server Failed Server Request Message** link.

## Windows VISTA and newer operating systems

1. Click the **Start** button.
2. In the **Search** box type **INETMGR**; click **Enter**. The *Internet Information Services Manager* will appear.

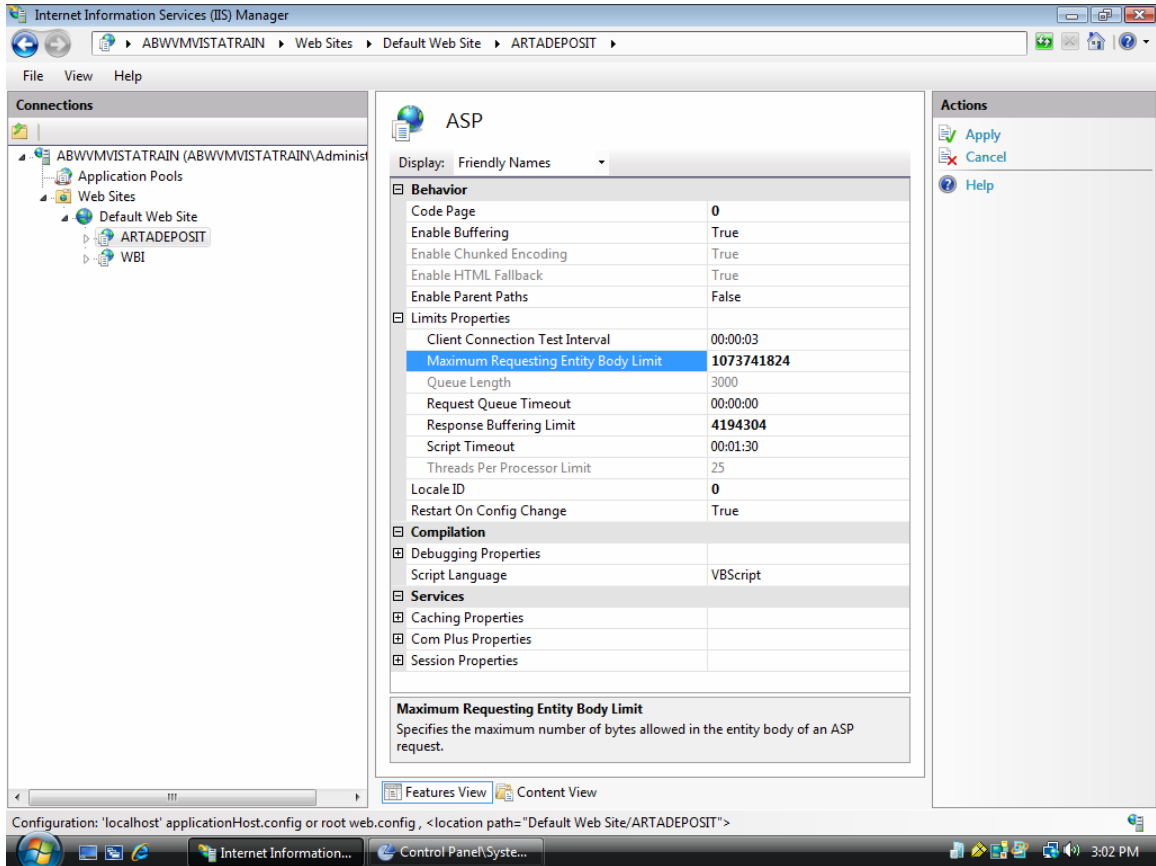
**NOTE:** You can browse to the Internet Information Services Manager by navigating through **Start->Control Panel->System And Maintenance->Administrative Tools-> Internet Information Services (IIS) Manager**

3. In the **Connection** pane, navigate to the local computer->**Web Sites->Default Web Site->ARTADEPOSIT**. The middle pane should show the features view as pictured below.



4. Double-Click on the **ASP** icon to display the available ASP properties.

- Click "+" to expand the **Limits Properties** category. Change the **Maximum Requesting Entity Body Limit** from its current value (probably 200000) to **1073741824**; click the **Apply** icon in the **Actions** pane.



- Exit Internet Information Services Manager.

## Final Notes

New versions of ARTA Deposit, incorporating new changes and capabilities, are regularly produced as part of our continuing service. We strongly recommend that you install all updates immediately to make sure that your program is operating with the most current functions and features.

Reasonable efforts were made to ensure that the information in this documentation is complete and accurate at the time of printing. We invite you to visit our Software Support Web site for the latest and most current documentation, downloads, and technical support information.

# How to Contact Us

## Support Web Site

Visit our Software Support Web site for documentation downloads, frequently asked questions, training, or support information at the following location:

<http://support.wolterskluwerfs.com>

We believe you will find this to be a valuable and convenient source of support information as well as links to beneficial industry sites.

## Downloading

To access the documentation as noted above and in the installation, go to our Software Support Web site, <http://support.wolterskluwerfs.com>. Select Documentation in the left panel menu. Enter your login ID and password. If you are new to this site, register for a login ID and password. Once you are logged in, follow the links for ARTA Deposit Documentation.

## Internet

Also you can visit us on the Web at [www.WoltersKluwerFS.com](http://www.WoltersKluwerFS.com).

## E-Mail

E-mail questions or issues to: [artadepositsup@wolterskluwerfs.com](mailto:artadepositsup@wolterskluwerfs.com)

## Call

You can telephone our SupportLine technicians at 1-800-274-2711, ext. 124039. 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 and version number
- customer number
- operating system and version number; service pack numbers, if installed

## Fax

You may fax us at 800-860-0694.

## Write

If you prefer, write a letter detailing your question and send it to:

### SupportLine

**Wolters Kluwer Financial Services, Inc.**

P.O. Box 1457

St. Cloud, MN 56301

## Additional SupportLine Services

We have always provided industry-leading support for our software products. Now we are providing even greater value with expanded support services beyond our standard application support. These services are outside your standard support agreement and there is an additional charge.

Listed below are some of the types of service issues that fall into this category, as they relate to your Wolters Kluwer Financial Services Software.

- Installation of software and/or software updates
- Operating system performance/tuning/maintenance
- Database related (backups, installations, configuration assistance)
- Windows XP/Vista, server operating system support
- Network data backups
- Network connectivity/performance issues/security issues/permissions
- Terminal Services /Citrix Metaframe support

We understand your desire to turn to one support area for the answers to your questions. This fee-based support offering allows us to bring this added value to you without detracting from support services.

Our goal is to continue to offer the quality support of our software applications, while providing the additional services you expect from Wolters Kluwer Financial Services, Inc. To find out more, talk to a SupportLine Specialist.

# Appendix A: Software and Hardware Requirements

## Network Server Requirements

### Software Requirements

#### Operating Systems

- Microsoft Windows Server 2003
- Microsoft Windows Server 2008

**NOTE:** For WAN, Windows Terminal Server is required.

#### Components

##### *All Required*

- Disk Defragmentation Software
- Virus Scan Software
- Backup software with appropriate agents, such as ARCserve, Veritas Backup Exec
- Internet Information Services/Server (IIS)
- Internet Explorer 6 or greater, with latest service pack installed

##### *Database (select one)*

- Microsoft SQL Server 2005 Express Edition (up to ten users only)
- Microsoft SQL Server 2000 with current service pack
- Microsoft SQL Server 2005 with current service pack
- Microsoft SQL Server 2008 with current service pack

### Hardware Requirements

**NOTE:** The following requirements are based on ten concurrent users; additional users may require increased requirements.

- 2.66 GHz Intel Pentium 4 Processor
- 1 GB RAM (minimum) 2 GB (recommended)
- CD ROM Drive
- Hard drive with ample free space for software installation (500 MB initial install, with an additional 50 MB free space for each added state. 4.0 GB free space for a full 51 jurisdiction install)

- Monitor/Video card capable of 800 x 600 pixel display resolution (minimum)

**NOTE:** To use Microsoft Windows Vista, the PC must be Windows Vista Capable.

## Printers

- PCL5 or PCL6 compatible laser printer (Example: HP 4000 Series, 8000 Series, and Lexmark Optra Series)
- Two programmable paper trays, one for letter size paper and one for legal size paper. ARTA Deposit does not require legal-size paper but may print disclosure documents on legal size paper.)Due to the large variety of printers, environments and printer drivers, ARTA Deposit may have difficulty printing to a specified (non-default) paper tray. We recommend utilizing the Manual Feed paper tray if use of special paper is desired.
- Printer memory:
  - 8 MB installed for 300dpi resolution
  - 16 MB installed for 600dpi resolution
  - 32 MB installed for 1200dpi resolution

**NOTE:** Due to the large variety of printers available in the market today, we are unable to test our programs with every printer.

Printers that are NOT supported include, but not limited to: HP L Series, HP1000 Series, HP2000 Series, Okipage Series, Brother HL 1000 Series.

## Additional Notes

- These requirements are subject to change without notice. Refer to our Support Web site at <http://support.wolterskluwerfs.com> for the most current and complete list of requirements.
- A higher megahertz (MHz) processor and/or more random access memory (RAM) can increase performance of ARTA Deposit.
- These requirements are for ARTA Deposit only. Consult with your technical staff if you will be running additional applications, such as Microsoft Outlook, Microsoft Word, etc.
- A writable CD-ROM drive (CD-R/RW) will facilitate the data backup and restore process easily, though it is not required.

# Appendix B - Troubleshooting

ARTA Deposit has five prerequisite software programs and several messages that may appear during the setup and installation process. This appendix includes the information for installing the prerequisites manually and troubleshooting messages received during setup and installation.

## Prerequisites

### Internet Information Services

Internet Information Services (IIS) is used on network server installations of ARTA Deposit to dynamically create the screens seen in the program. IIS also must be implemented before continuing with the ARTA Deposit installation.

IIS is part of the Windows XP Professional operating system. It must be installed and may require the operating system CD-ROM for the installation.

Complete the following steps to complete the installation and implementation of IIS. Refer to the steps for the installation media and operating systems you are using.

### Windows XP Professional

You may need your Windows XP Professional CD-ROM to complete the steps listed below. If you have a Windows service pack installed on your computer you will also need the service pack files CD-ROM. If you are presented with a screen requesting a CD-ROM, please read the screen carefully to determine which CD-ROM is needed.

1. Exit any programs you may have running.
2. Select **Start, Settings, Control Panel**.
3. Double-click the **Add/Remove Programs** icon.
4. Select **Add/Remove Windows Components**.
5. Select **Internet Information Services (IIS)** in addition to any checked components and click **Next** in the Windows Components Wizard.
6. If you have the Windows XP Setup files on your computer, the installation will begin. Skip to step 13.

If not, insert the requested CD-ROM (either the Windows XP Professional CD-ROM or the service pack files CD-ROM) and click **OK**.

7. Click **Browse** on the *Files needed* screen.
8. Select the drive containing the requested CD-ROM in the *Look in* field.
9. Double-click the **I386** folder.

10. Click **Open** to return to the *Files needed* screen.
11. Click **OK** to start the installation of files.
12. If requested, insert the appropriate CD-ROM and click **OK**.
13. Click **Finish** to complete installation.
14. Close **Add/Remove Programs**.
15. Close **Control Panel**.

### Windows Server 2003

You may need your Windows Server 2003 CD-ROM to complete the steps listed below. If you have a service pack installed on your computer you will also need the service pack files CD-ROM. If you are presented with a screen requesting a CD-ROM, please read the screen carefully to determine which CD-ROM is needed.

1. Exit any programs you may have running.
2. Select **Start, Control Panel**.
3. Double-click the **Add/Remove Programs** icon.
4. Select **Add/Remove Windows Components**.
5. Select **Application Server** in addition to any checked components and click **Details**.
6. Select **Internet Information Services**; click the **Details** button.
7. Verify that the following sub-components are selected:
  - Common Files
  - Internet Information Services Manager
  - World Wide Web Service
8. Highlight **World Wide Web Service** and click **Details**.
9. Verify that the following sub-components are selected:
  - Active Server Pages
  - World Wide Web Service
10. Click **OK** until you are returned to the Windows Components Wizard.
11. Click **Next** in the Windows Components Wizard.
12. If you have the Windows Server 2003 Setup files on your computer, the installation will begin. Skip to step 18.

If not, insert the requested CD-ROM (either the Windows Server 2003 CD-ROM or the service pack files CD-ROM) and click **OK**. (If you receive the *Microsoft Windows Server 2003 CD-ROM* screen, click **Exit**).
13. Click **Browse** on the *Files needed* screen.

14. Select the drive containing the requested CD-ROM in the *Look in* field.
15. Double-click the **I386** folder.
16. Click **Open** to return to the *Files needed* screen.
17. Click **OK** to start the installation of files.
18. If requested, insert the appropriate CD-ROM and click **OK**. (If you receive the *Microsoft Windows Server 2003 CD-ROM* screen, click **Exit**).
19. Click **Finish** to complete installation.
20. Close **Add/Remove Programs** then the **Control Panel**.

## Microsoft SQL Server Express

For a network - small implementation server (up to 5 concurrent users), Microsoft SQL Server Express is the database that is used for ARTA Deposit data storage. Install SQL Express on stand-alone and network - small implementation servers only; do not install this on client workstations. With the ARTA Deposit Version 2011.1, SQL Express is a prerequisite and is part of the early installation process, if necessary.

## Setup/Installation Messages

### ARTA Deposit Installation Messages

Depending on your system's configuration, the following messages may appear during installation. Read the message carefully to determine what steps are needed to proceed.

#### Unable to Locate Software Support Web Site

This message displays after selecting to download either the release notes or the installation instructions on the first welcome screen in the ARTA Deposit Setup program. An Internet connection is required in order to access the web site and acquire these documents. Check for your Internet connection or if the server is temporarily unavailable.

#### Client Setup

The setup program does not allow for a client installation on a workstation previously set up as a stand-alone configuration. Uninstall the previous instance of ARTA Deposit, then begin the client installation to resolve this error.

#### Version Conflict

If the Setup program detects a newer version of ARTA Deposit already installed, a warning message will appear. Click **OK** to exit the setup.

## Program Reinstall

If the Setup program detects the same version of ARTA Deposit already installed, a warning message will appear and options are to continue or quit the installation.

## Required Prerequisites

- **Internet Explorer Required:** The Setup program will exit if it does not detect Internet Explorer 6.0. You must install Internet Explorer 6.0.
- **IIS Required:** The Setup program will exit if it does not detect IIS. You must install IIS.
- **Microsoft Windows Installer 3.1:** The Setup program will exit if it does not detect Microsoft Windows Installer 3.1. You must install Microsoft Windows Installer 3.1.
- **MDAC 2.6 SP1 Required:** The Setup program will exit if it does not detect Microsoft Data Access Components (MDAC). You must install MDAC.
- **SQL Server/Express Required:** The Setup program will exit if it does not detect SQL Server or SQL Express. You must install SQL if you receive this message.
- **Microsoft .NET Framework 2.0:** The Setup program will exit if it does not detect Microsoft .NET Framework 2.0. You must install Microsoft .NET Framework 2.0.
- **Microsoft .NET Framework 4.0:** The Setup program will exit if it does not detect Microsoft .NET Framework 4.0. You must install Microsoft .NET Framework 4.0.
- **MSXML 4.0 SP3 (For 64-Bit Operating Systems Only):** On a supported 64-bit operating system, you will need to install MSXML4.0, Service Pack 3 before beginning your ARTA Deposit installation.

## Administrator Rights

Setup will exit if you do not have administrator rights to install ARTA Deposit on this system.

## Client Setup

The Setup program will exit if you try to perform a client setup and the Setup program detects the computer is either a server or a stand-alone.

## MSXML 4.0 is Missing

If MSXML has not been installed on your ARTA Deposit server, you might receive the following error:

Automation server can't create object

Close down ARTA Deposit and install MSXML 4.0.

## App Pool Not Setup

If you have not configured the Application Pool in Internet Information Server, you will receive the following error when using ARTA Deposit:

Error. An invalid character was found in text content.

Close down ARTA Deposit and configure the Application Pool.

### **Unable to create selected document message**

If you are unable to print a blank document or disclosure, check the permissions for the IUSR account in DCOM as well as the ARTA Deposit folder at the application server as documented earlier.

### **Error: The ARTA Deposit Server failed to perform the server request message when creating a new transaction**

When creating certain transactions, you may get an error message - "failed to perform server request". See section "Increasing ASP Request Size in IIS" a few pages back to configure a resource in IIS.

# Appendix C: Server Configuration

## Creating the mtsartaduser Account

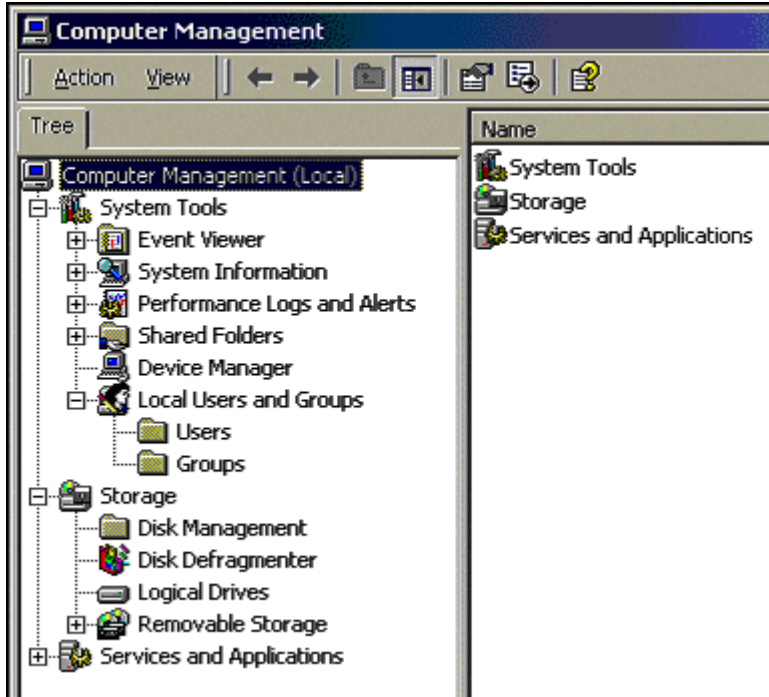
Server configurations require an MTS user be established on the server prior to the ARTA Deposit installation.

This appendix provides instructions for adding user in Windows XP Professional, Windows Server 2003, and Windows Vista operating systems.

**NOTE:** The MTSARTADUser account should be excluded from any account policies that restrict its ability to run on the local workstation. A required right that is sometimes restricted by group policies is "log on as a batch job".

### Windows XP/2003 Professional and Server

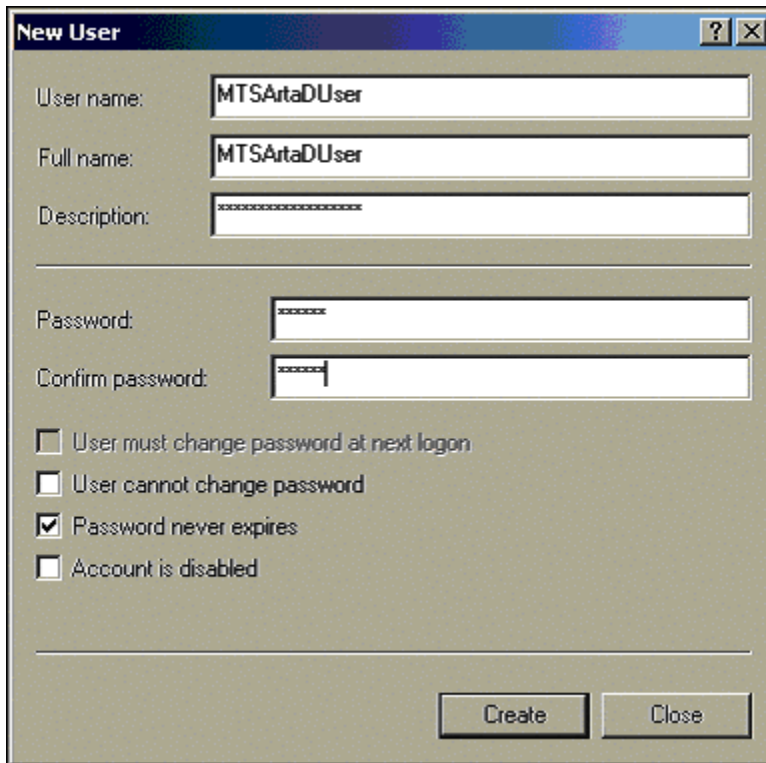
1. Right-click **My Computer**, then select **Manage**.
2. Double-click to expand *Local Users and Groups*. On a domain controller, this option will not be available. Add this user account as you would any other user account.



3. Select the *Users* folder, then click **Action** on the menu bar and select **New User**.

4. The *New User* window appear.

- Enter the user name mtsartaduser.
- Enter a full name and description for your own recognition in the future.
- Type the password and confirm it. Make note of this password as it will be needed during the installation.
- Uncheck **User must change password at next logon**.
- Check **Password never expires**.



The screenshot shows a 'New User' dialog box with the following fields and options:

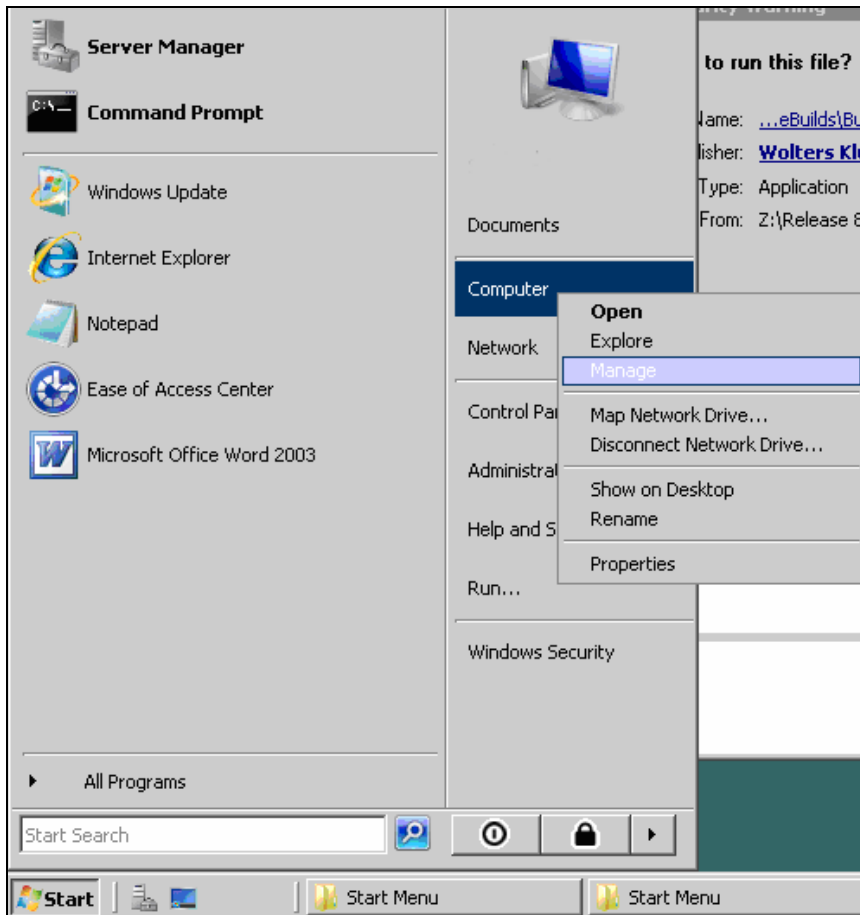
- User name:
- Full name:
- Description:
- Password:
- Confirm password:
- User must change password at next logon
- User cannot change password
- Password never expires
- Account is disabled

Buttons:

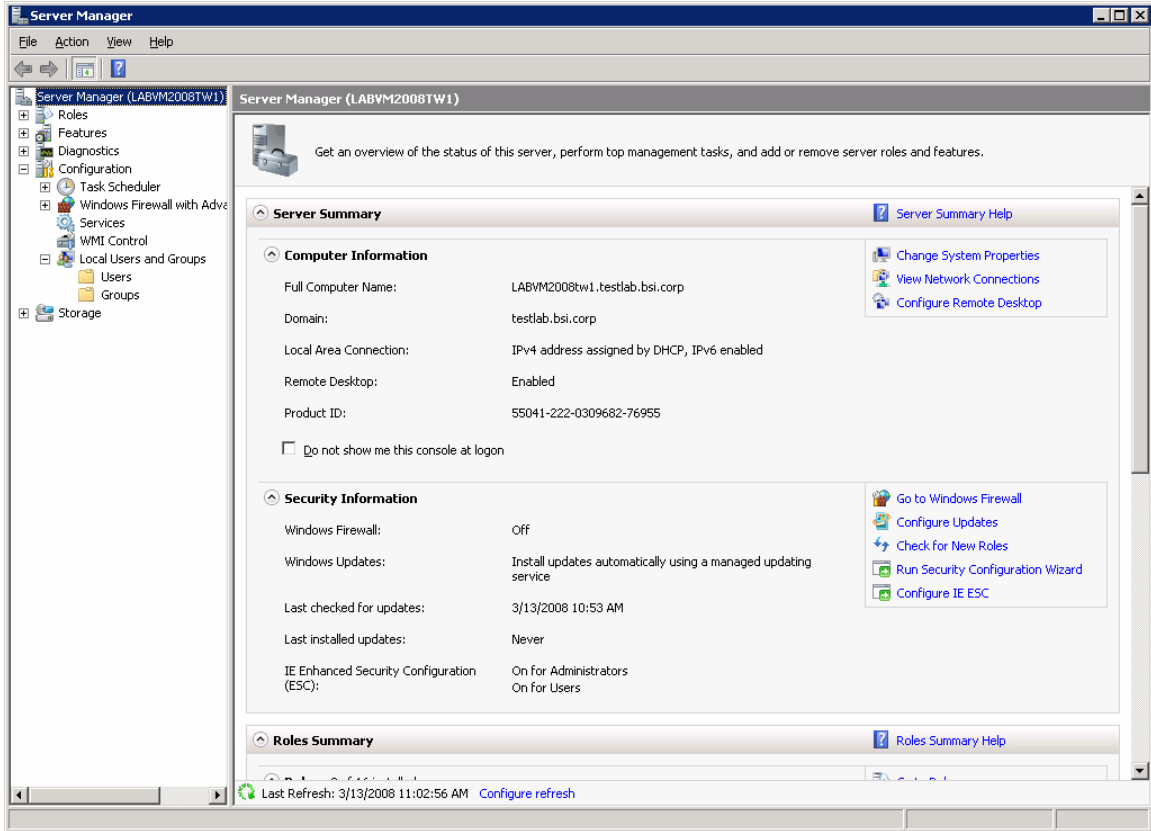
5. Click **Create**; close out of the control panel.

## Windows 2008 Server

6. On the bottom left corner of your screen click **Start**; navigate to **Computer**. Right click on **Computer**; scroll to **Manage**.

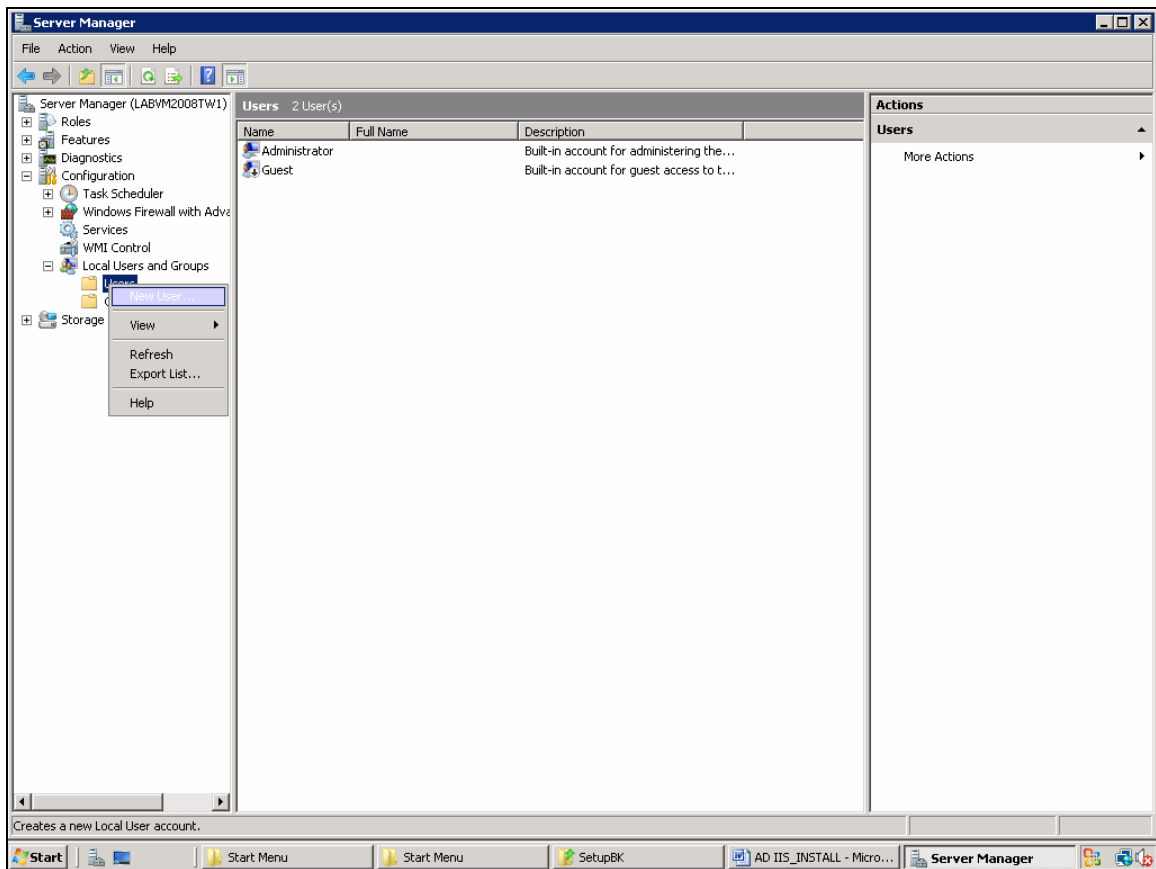


7. The *Server Manager* screen appears. Expand **Configuration/Local Users and Groups**.



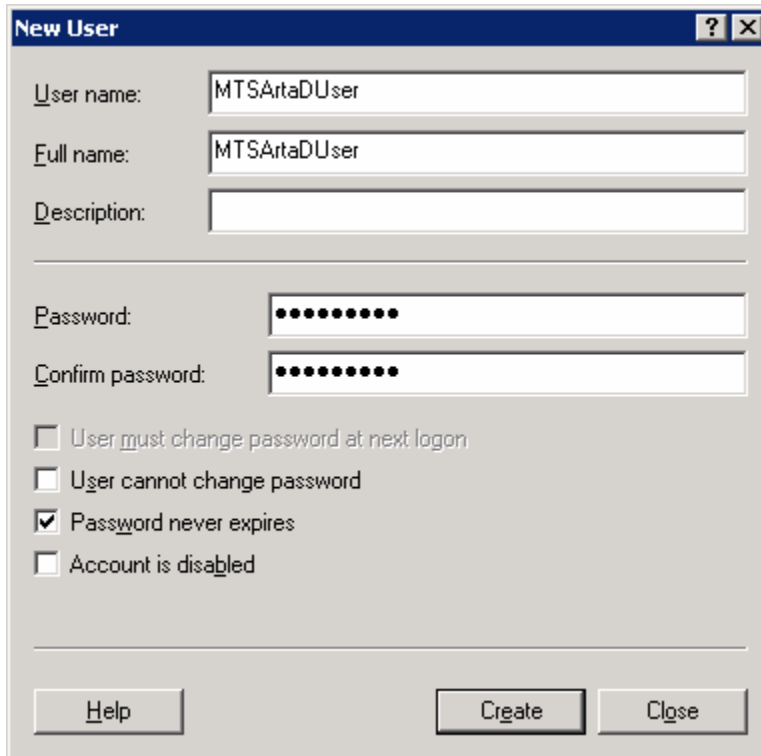
8. Perform one of the following:

- Right-click on **Users**; select **New User**.
- Select the **Users** folder. Click **Action** on the menu bar and select **New User**.



9. The *New User window* appears. Perform the following:

- Enter the user name **mtsartaduser**.
- Enter a full name and description for your own recognition in the future.
- Enter the password and confirm it. Make note of this password as you will need it during the installation.
- Uncheck **User must change password at next logon** (if applicable).
- Check **Password never expires**.



The screenshot shows a 'New User' dialog box with the following fields and options:

- User name:** MTSArtaDUser
- Full name:** MTSArtaDUser
- Description:** (empty)
- Password:** (masked with 10 dots)
- Confirm password:** (masked with 10 dots)
- User must change password at next logon
- User cannot change password
- Password never expires
- Account is disabled

Buttons at the bottom: Help, Create, Close.

10. Click **Create**.

11. Click **Close**.

