

Privacy Disclosure Installation Instructions

This document describes the procedures required for installing your privacy disclosure. Your privacy disclosure is a customized document created for your institution by Bankers Systems for use within the ARTA Deposit Documentation System.



Before You Begin

The privacy disclosure installation must be performed on all client, server, and stand-alone workstations where ARTA Deposit is installed.

Before proceeding with the installation, review the following:

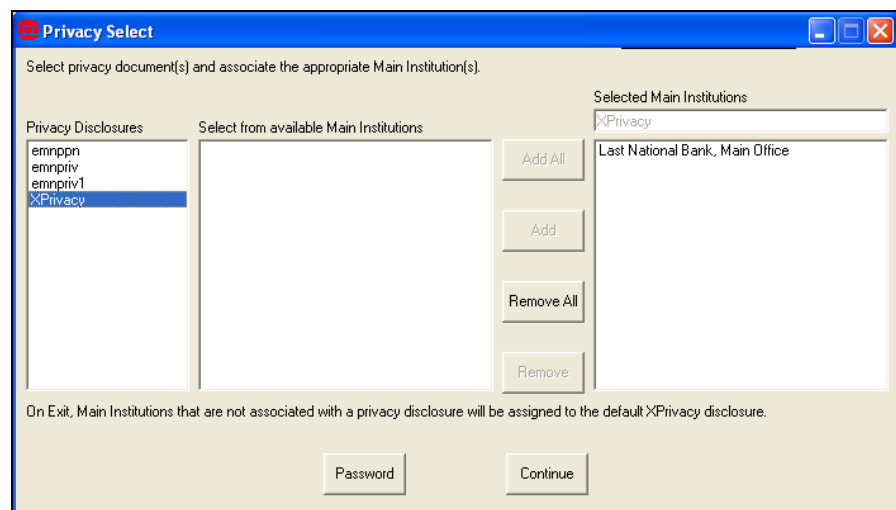
- Verify you have the most recent version of ARTA Deposit currently installed.
- Have all users exit from the ARTA Deposit Documentation System when adding new documents such as privacy disclosures. All users should remain out of the program until the installation is complete.
- Close the ARTA Deposit Documentation System and any other Windows programs that may be running. The setup program cannot install system files or update shared files if they are in use.

NOTE: If you receive an error message while installing, proceed to the *Error Resolution* section later in this document.

Privacy Disclosure – Installation Instructions

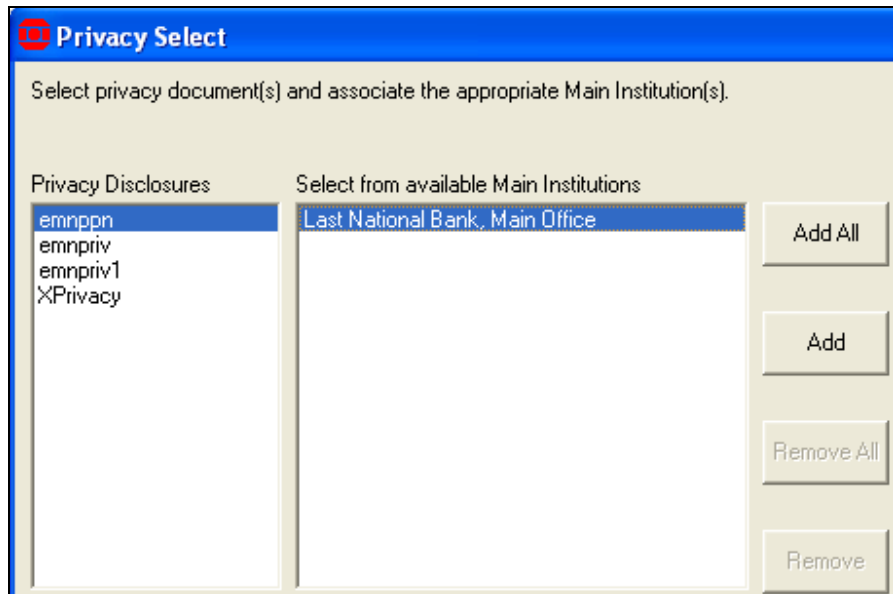
Setup.exe is on the CD-ROM with your privacy disclosure and will perform most of the installation for you while it allows you to assign the privacy disclosure to specific main institutions.

1. Insert your privacy disclosure CD-ROM into the CD-ROM drive on your computer.
2. Select **Start, Run** and **Browse**.
3. Navigate to the CD-ROM drive and select **Setup.exe**. Click **Open** to return to the *Run* window, then click **OK**.
4. The *Welcome* screen will display. Click **Next**.
5. You may see a brief *Installing* status box, but that will go away and the Privacy Select utility will open. This utility allows you to specify which privacy disclosure(s) may be used by which main institutions.

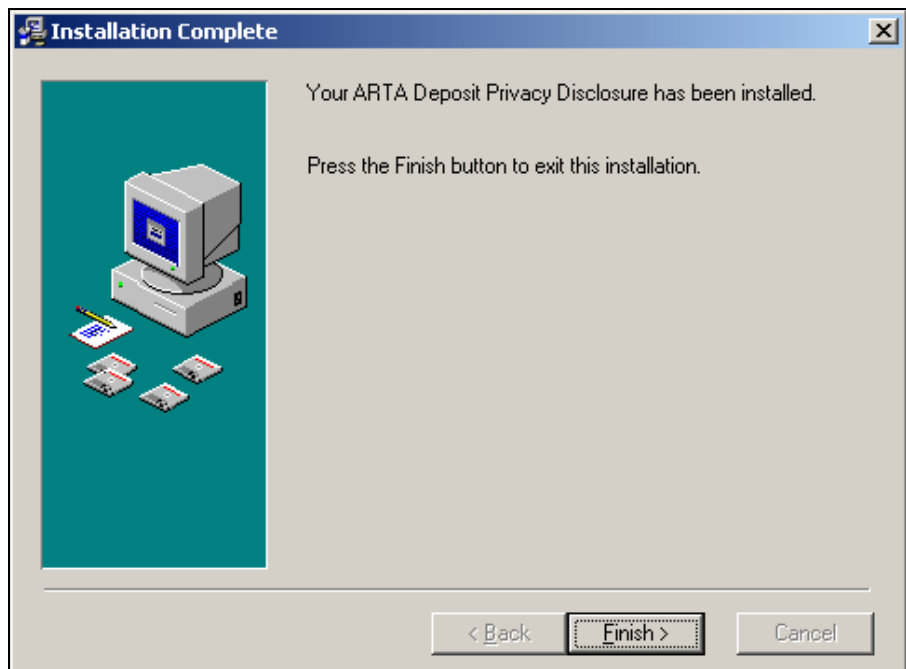


6. At least two disclosures should display in the *Privacy Disclosures* box on the left side of the screen: XPRIVACY is a default file; E*.* (where the * = any text) will be your custom disclosure. If the *Select from available Main Institutions* box is empty, proceed to Step 7. If your main institution is listed here, skip to Step 8.
7. You must detach the default file, XPRIVACY, from your main institution before you can install and attach your custom disclosure. Select XPRIVACY in the *Privacy Disclosures* box. Your main institution will be listed in the *Selected Main Institutions* box. Click **Remove All**.
8. Attach your new custom privacy disclosure to the main institution. Select your custom disclosure file, E*.* from the *Privacy Disclosures* box. Then select the appropriate main institution in the *Select from available Main Institutions* box that will use the selected privacy disclosure. Click the **Add** button. If you have

more than one custom privacy disclosure, repeat this step for each custom privacy disclosure.



9. Click **Continue**. You will be asked if you wish to save changes to your list. Click **Yes**.
10. A dialog box will appear, as shown below, indicating the installation is complete.



11. Click **Finish** to exit the installation.
12. Proceed to *Activating the Disclosure in ARTA Deposit* for steps to activate the privacy disclosure for use in ARTA Deposit.

Activating the Disclosure in ARTA Deposit

Prior to this installation, when the privacy disclosure was selected from the list of documents, ARTA Deposit would display a message instructing the customer to contact Bankers Systems, Inc. for specific disclosure language.

Upon completion of these steps, your privacy disclosure will be available to be selected and printed at the end of each transaction.

1. Open ARTA Deposit and log in.
2. Select **Setup** from the Main menu. Select Main Institution or Branch Institution accordingly (e.g., if your disclosure is attached to a main institution, select Main Institution), then click **Next**.
3. Select your specific financial institution and click **Edit**.
4. Select **Documents** from the Institution Setup navigator.
5. Click the **Document Name** column heading to sort the documents alphabetically. Scroll through the list and select **Privacy Disclosure**.

The screenshot shows the 'Last National Bank' sidebar on the left with a purple background and white text. The 'Documents' option is highlighted in yellow. The main window is titled 'Set up ARTA Deposit document properties.' and contains a list of document names. The 'Privacy Disclosure' document is selected and highlighted in blue. At the bottom of the window are three buttons: 'Edit Properties', 'Preview', and 'Print Blank', along with a small icon.

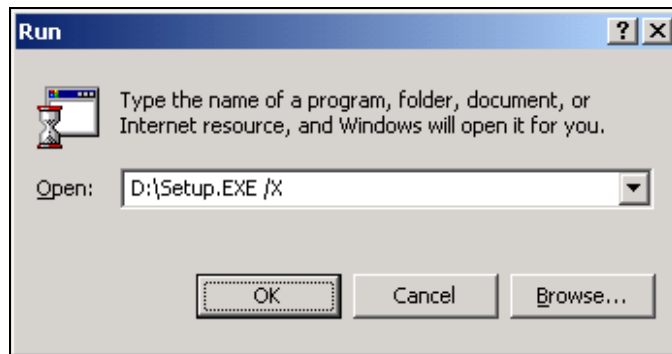
Document Name
Debit/ATM Card Application (CARD-APP)
Dual-Control Signature Card - 5 x 3 (DCSC-1(5X3))
Electronic Funds Transfer Disclosure
FCRA: Notice Regarding Inaccurate Information (FCRA-NRA)
FCRA: Notice of Action Taken (All-Purpose) (DN-FCRA-D)
FCRA: Notice of Action Taken (Cons. Rep. Agency) (DNFCRA-D-CRA)
Federal Funds Availability Disclosure
Federal Sale of Insurance Disclosure (INS-WARN)
IRA 70 1/2 Election Form (IRA-6-LAZ)
IRA Contribution Instructions (IRACMBCONLAZ)
IRA Distribution Form (IRACMBDISLAZ)
IRA Election of Payment by Beneficiary (IRACMBEPBLAZ)
IRA Recharacterization (IRA-RCHT-LAZ)
IRA Request Transfer Or Conversion To TRS IRA (IRACMBTRCVLZ)
IRA Rollover or Conversion Review (IRACMBROLLAZ)
IRA Value Projection
Limits and Fees Disclosure
Night Depository Agreement (NDA-100)
Power of Attorney (POA)
Privacy Disclosure
Rate Sheet
Request for Direct Rollover (IRA-DIRROLLZ)
Roth IRA Custodial Account Agreement (ARTA-CUSROTH)
Roth IRA Trust Account Agreement (ARTA-T-ROTH)
Safe Deposit Lease (MN) (SDL-MN)
Traditional IRA Custodial Account Agreement (ARTA-IRA-49)
Traditional IRA Trust Account Agreement (ARTA-IRA-49T)

6. Click **Edit Properties**. Ensure the *Document Active* box is checked. Click **Finished** to close this window.
7. Exit and save your institution information.

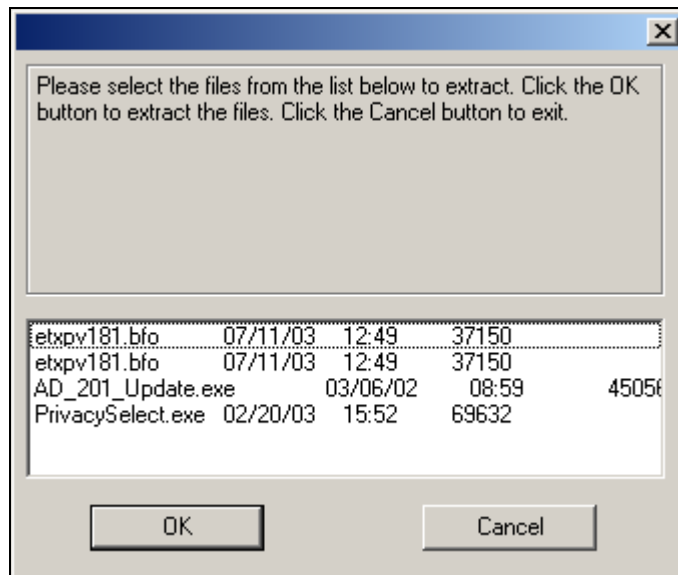
Error Resolution

If you receive an error message during the installation, complete the following procedure.

1. Restart the installation by selecting **Start, Run** and **Browse**.
2. Navigate to the CD-ROM drive and select **SETUP.EXE**.
3. Click **Open**.
4. Click in the **Open** field on the *Run* window.
5. Type “ /X” (space, slash, X) after the file name, as displayed in the example below.

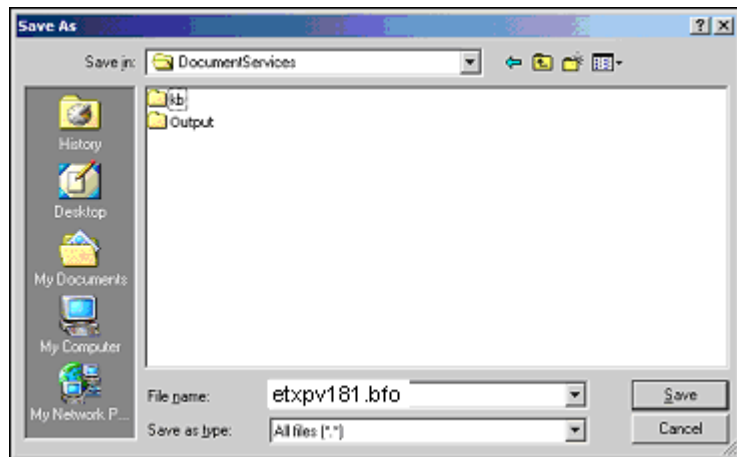


6. Click **OK**.
7. The following screen appears. Select the applicable file(s).
 - If you are installing to a stand-alone or server computer, select both files by single clicking each file.
 - If you are installing to a client computer, select the first file by single clicking the file.

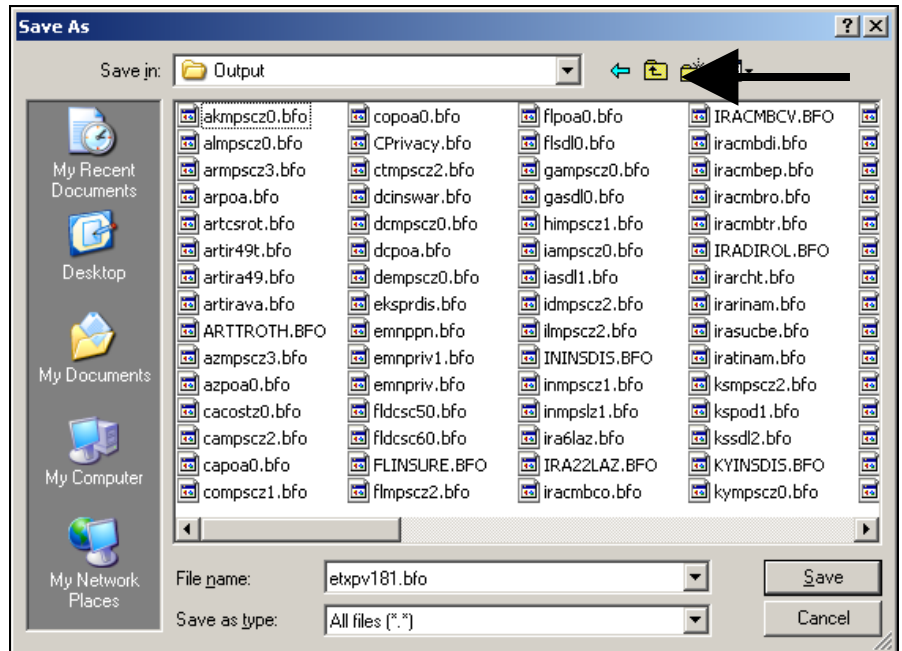


8. Click **OK**.

9. Navigate to the folder where ARTA Deposit is installed. (Example: C:\Program Files\BSIApps\ARTADeposit)
10. Double-click to open the **DocumentServices** folder.
 - If you are installing to a Stand-alone or Server computer, you will see both the **kb** folder and **Output** folder displayed.
 - If you are installing to a Client computer, only **Output** will be displayed.



11. Double-click to open the **Output** folder.
12. Click **Save**.
13. When prompted, click **Yes** to replace the existing file.
 - If you selected one file in step 8, the Setup program exits automatically. Proceed to the *Activating the Disclosure In ARTA Deposit* section for steps to activate the Privacy Disclosure.
 - If you selected both files in step 8, another **Save As** screen appears.



14. Click the **Up One Level** button to navigate back to the **DocumentServices** folder.
15. Double-click to open the **kb** folder.
16. Double-click to open the **Docs** folder.
17. Double-click to open the **BFO** folder.
18. Click **Save**.
19. When prompted, click **Yes** to replace existing file.
20. The Setup program exits automatically.

Proceed to *Activating the Disclosure in ARTA Deposit* for steps to activate the Privacy Disclosure for use in the ARTA Deposit program.

If you have any questions regarding your software, please call our SupportLine staff at 1-800-274-2711, ext. 4039 or visit our web site at www.support.bankerssystems.com