

Wolters Kluwer Financial Services
Medici[®] Commercial Lending
Documentation System
Version 2010.2

Installation Instructions, New and Upgrade

October 2011

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The Medici Group, Waltham, Massachusetts

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Publication Information

Product name: Medici Commercial Lending Documentation System

Document name: Installation Guide

Product version: 2010.2

Document version: 2010.2

October 2011

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Introduction

Welcome to the instructions for installing Medici release 2010.2. This guide addresses new installations as well as updating existing Medici installations, either from 3.x or 2010.1.

Note: The instructions for updating from 3.x are substantially different than updating from Medici 2010.1. Click **Help, About** from the menu in Medici to determine your currently installed release number.

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

Important: Wolters Kluwer Financial Services has made every effort to ensure an error-free installation. However, if you encounter an error message during installation, call **Medici Support** at 1-800-274-2711 ext. 125343 before proceeding.

Summary for Updating Medici

This installation can be used to update any earlier version of Medici.

Updating from Medici 3.x

Your update will proceed along these lines:

- Review system requirements to make sure you are up-to-date with all prerequisite software
- Perform and complete pre-install tasks, including the backup of your database and critical files
- Uninstall your existing version of Medici
- Removal of left over files
- Install the new 2010.2 version of Medici
- Copy back the backed-up database and files
- Perform some post-install configuration

Updating from Medici 2010.1

Your update will proceed along these lines:

- Review system requirements to make sure you are up-to-date with all prerequisite software
- Perform and complete pre-install tasks, including the backup of your database and critical files
- Install the new 2010.2 version of Medici (no previous release uninstall required)
- Perform some post-install configuration

Summary for New Medici Installation

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

Your new Medici installation will proceed along these lines:

- Review and complete pre-install tasks
- Install the 2010.2 version of Medici
- Perform some post-install configuration

System Requirements

The latest hardware requirements and list of supported Windows operating systems for each implementation of Medici can be found on the SupportLine web site, http://support.wolterskluwerfs.com/Documentation/assets/Medici_System_Requirements.pdf. Other required software is also listed.

Note: Only the 32-bit version of Office 2010 is supported. The 64-bit version of Office 2010 is not supported and cannot be used with Medici at this time.

Security Settings in Some Operating Systems

You may receive an operating system warning if you are installing on any of the following operating systems and your current security settings are preventing the installation of Medici:

- Windows Vista - 32-bit & 64-bit
- Windows 7 - 32-bit & 64-bit
- MS Server 2008 - 32-bit & 64-bit

You may also receive these same warnings when you try to open Medici on any of these operating systems. You may need to revisit user permissions or security policy for your operating system before installing or using this release of Medici.

Pre-installation Tasks

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

Pre-install Tasks for an Existing Install Upgrade

Database Backup

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

Transactions Backup

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

Delete Numerical DMTransaction Subfolders

If you are upgrading from any previous version, delete all the numerical folders found within the DMTransaction\DocumenterUpdateFolder location.

Important: You must delete all of the numerical subfolders under the DMTransaction\DocumenterUpdateFolder location.

Custom Files Backup

A number of files used by Medici should be backed up before installing this release.

Server Files and Folders

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

- DMLic.lic - Your Medici license file, in the MediciServer folder
- Userdocs folder (if available)
- Server.ini - In the MediciServer folder
- NumToText.XML (if available), in the MediciServer folder

- Encryption Key location - The location of this file is specified in server.ini, located in the MediciServer folder. Note this folder location as you will be asked for it during the server install.

Important: If you are not sure about the location of your Encryption Keys folder, contact **Medici Support** at 1-800-274-2711 ext. 125343 or MediciTechSupport@wolterskluwer.com before proceeding. Backup is imperative since if for any reason you lose your keys, or they become corrupted, Wolters Kluwer Financial Services cannot recover them, and any data encrypted using those keys cannot be decrypted.

Client Files and Folders

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

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

Medici Previous Version Uninstall

If you are upgrading from Medici 3.x to Medici Release 2010.2 you must un-install the previous version manually before you install 2010.2.

Note: You do not need to un-install the previous version if you are upgrading from 2010.1 to 2010.2.

1. After you have backed up the files listed previously, un-install the earlier releases of Medici using the Add/Remove Program option available in Control Panel in Windows.
2. After the earlier version of Medici is un-installed, you must delete the MediciServer and MediciClient folders manually from your respective Medici server and client machines.

Note: Failure to properly uninstall a 3.x version and remove the MediciServer and MediciClient folders prior to installing 2010.2 will result in an improperly installed Medici 2010.2 version.

When uninstalling the Medici client you may encounter a warning about a missing DMEDocumentGenerator.dll:

The following files did not self-register or unregister:

1. C:\Medici\MediciClient\DMEDocumentGenerator.dll

The specified module could not be found.

Ignore the warning. The uninstallation of the client was successful.

Database Permissions

Database permissions and users that you established for earlier versions of Medici will work with 2010.2. Note that the credentials chosen at install time will need to have the DB_Owner access at a minimum to the database being upgraded, and DB_Creator permissions on the SQL Server to upgrade an existing Medici database. These roles are only required during the upgrade process. The application server's SQL credentials also need DB_reader and DB_writer access to the SQL database.

Database Upgrade Pre-Requisite Installation

The following components will need to be installed prior to installing and running the database upgrade portion of the installation.

Note: If you are running the Medici upgrade from a machine that is remote to the instance of SQL Server hosting the database being upgraded, and the machine the installer runs from does not have SQL Server, you can uninstall these packages after the database has been successfully upgraded on the remote machine.

SQL Server 2008 R2 System CLR Types Install

Install the SQL Server 2008 R2 System CLR Types package as a pre-requisite. If this package is not installed prior to selecting the database feature in the Medici install, the Medici install will abort. It should be installed on the same machine from which you will run the install for the database server feature.

The 32-bit version of the installation will be located at <cd folder>\Prerequisites\SQLCLRTypes\X86\SQLSysClrTypes.msi.

The 64-bit version of the installation will be located at <cd folder>\Prerequisites\SQLCLRTypes\X64\SQLSysClrTypes.msi.

Note that the **System CLR Types for SQL Server 2008 R2** installation requires Windows Installer 4.5 and its installer can be downloaded from

<http://www.microsoft.com/downloads/en/details.aspx?familyid=5a58b56f-60b6-4412-95b9-54d056d6f9f4&displaylang=en>.

SQL Server 2005 Native Client Install

If you are upgrading the Medici database, then the SQL Server 2005 Native Client should be installed as a pre-requisite.

It should be installed on the same machine on which you will run the install for the database server feature.

The SQL Server 2005 Native Client can be found at <http://www.microsoft.com/downloads/en/details.aspx?familyid=df0ba5aa-b4bd-4705-aa0a-b477ba72a9cb&displaylang=en>. The Native Client file, `sqlncli.msi` or `sqlncli_x64.msi`, is available for both 32- and 64-bit operating systems. Right-click on the .msi file and choose **Install** to begin installation. Instructions for installing SQL Native Client can be found at [Appendix A: SQL Server Native Client Install](#).

SQL Server 2008 R2 Native Client Install

If you are upgrading the Medici database, then the SQL Server 2008 R2 Native Client should be installed as a pre-requisite.

It should be installed on the same machine on which you will run the install for the database server feature.

The SQL Server Native Client is also bundled in the Medici install program. It will be installed by the installation program if necessary.

Instructions for installing SQL Native Client can be found at [Appendix A: SQL Server Native Client Install](#).

SQL Server 2005 Management Objects Collection Install

If you are upgrading and installing the Medici database, then the SQL Server 2005 Management Objects Collection should be installed as a pre-requisite.

It should be installed on the same machine on which you will run the install for the database server feature.

The SQL Server 2005 Management Objects Collection can be found at <http://www.microsoft.com/downloads/en/details.aspx?familyid=df0ba5aa-b4bd-4705-aa0a-b477ba72a9cb&displaylang=en>. The file, `SQLServer2005_XMO.msi` or `SQLServer2005_XMO_x64.msi`, is available for both 32- and 64-bit operating systems. Right-click on the .msi file and choose **Install** to begin installation.

Instructions for installing the SQL Server Management Objects Collection can be found at [Appendix B: SQL Server Management Objects Collection Install](#).

SQL Server 2008 R2 Shared Management Objects Collection Install

If you are upgrading and installing the Medici database, then the SQL Server 2008 R2 Shared Management Objects Collection should be installed as a pre-requisite.

It should be installed on the same machine on which you will run the install for the database server feature.

The SQL Server Management Objects Collection is also bundled in the Medici install program, compressed within the Setup.exe. It will be installed by the installation program, if missing.

If you wish, you can install the SQL Server 2008 R2 Shared Management Objects Collection prior to installing Medici. For instructions on how to install the SQL Server Management Objects Collection, see [Appendix B: SQL Server Management Objects Collection Install](#).

Pre-install Tasks for a New Install

.NET Framework Installation

For all features, server, database, and client, you will need the following versions of .Net Framework installed:

- Microsoft .NET Framework Version 1.1
- Microsoft .NET Framework Version 2.0 SP1

The install will abort if either of these versions is not present.

Note: Windows 7 and Vista SP1 already contain .NET Framework 2.0 SP1 as part of the operating system.

You can install them from the following folders on the CD depending on whether you are installing onto a 32- or 64-bit operating system:

- .NET 1.1 folder: Prerequisites\NET Framework\1.1\dotnetfx.exe. Use this file for both 32- and 64-bit installations.
- .NET 2.0 SP1, 32-bit folder: Prerequisites\NET Framework\2.0SP1\X86\NetFx20SP1_x86.exe
- .NET 2.0 SP1, 64-bit folder: Prerequisites\NET Framework\2.0SP1\X64\NetFx20SP1_x64.exe

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

Database Backup File Location

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

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

License File

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

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

Medici Encryption Keys

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

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

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

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

Operating System Permissions

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

Database Permissions

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

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

Database Pre-Requisite Installation

The following components will need to be installed prior to installing and running the database portion of the installation.

SQL Server 2008 R2 System CLR Types Install

You should install SQL Server 2008 R2 System CLR Types package as a pre-requisite. If this package is not installed prior to selecting the database feature in the Medici install, the Medici install will abort. It should be installed on the same machine on which you will run the install for the database server feature.

The 32-bit version of the installation will be located at <cd folder>\Prerequisites\SQLCLRTypes\X86\SQLSysClrTypes.msi.

The 64-bit version of the installation will be located at <cd folder>\Prerequisites\SQLCLRTypes\X64\SQLSysClrTypes.msi.

Note that the **System CLR Types for SQL Server 2008 R2** installation requires Windows Installer 4.5 and its installer can be downloaded from

<http://www.microsoft.com/downloads/en/details.aspx?familyid=5a58b56f-60b6-4412-95b9-54d056d6f9f4&displaylang=en>.

Note: Windows 7 does not require Windows installer 4.5 as Windows Installer 5 is a built-in component.

SQL Server 2008 R2 Native Client Install

If you are upgrading the Medici database, then the SQL Server 2008 R2 Native Client should be installed as a pre-requisite.

It should be installed on the same machine on which you will run the install for the database server feature.

The SQL Server Native Client is also bundled in the Medici install program. It will be installed by the installation program if necessary.

Instructions for installing SQL Native Client can be found at [Appendix A: SQL Server Native Client Install](#).

SQL Server 2005 Management Objects Collection Install

If you are upgrading and installing the Medici database, then the SQL Server 2005 Management Objects Collection should be installed as a pre-requisite.

It should be installed on the same machine on which you will run the install for the database server feature.

The SQL Server 2005 Management Objects Collection can be found at <http://www.microsoft.com/downloads/en/details.aspx?familyid=df0ba5aa-b4bd-4705-aa0a-b477ba72a9cb&displaylang=en>. The file, **SQLServer2005_XMO.msi** or **SQLServer2005_XMO_x64.msi**, is available for both 32- and 64-bit operating systems. Right-click on the .msi file and choose **Install** to begin installation.

Instructions for installing the SQL Server Management Objects Collection can be found at [Appendix B: SQL Server Management Objects Collection Install](#).

SQL Server 2008 R2 Shared Management Objects Collection Install

If you are upgrading and installing the Medici database, then the SQL Server 2008 R2 Shared Management Objects Collection should be installed as a pre-requisite.

It should be installed on the same machine on which you will run the install for the database server feature.

The SQL Server Management Objects Collection is also bundled in the Medici install program, compressed within the Setup.exe. It will be installed by the installation program, if missing.

If you wish, you can install the SQL Server 2008 R2 Shared Management Objects Collection prior to installing Medici. For instructions on how to install the SQL Server Management Objects Collection, see [Appendix B: SQL Server Management Objects Collection Install](#).

DMTransaction Path

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

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

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

Installing Medici

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

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

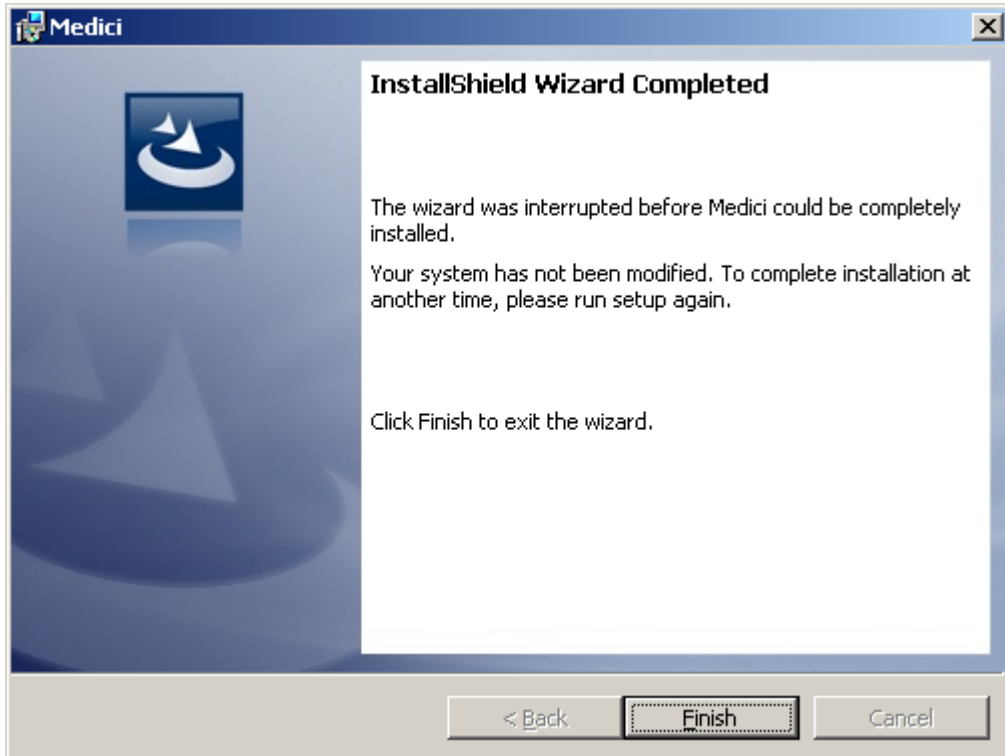
Note: If these features are spread across multiple machines for your Medici configuration, you will need to install the features in the following order: Database, Server, Client.

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

Canceling or Interrupting the Medici Install

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

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



Click **Finish** to exit the installation.

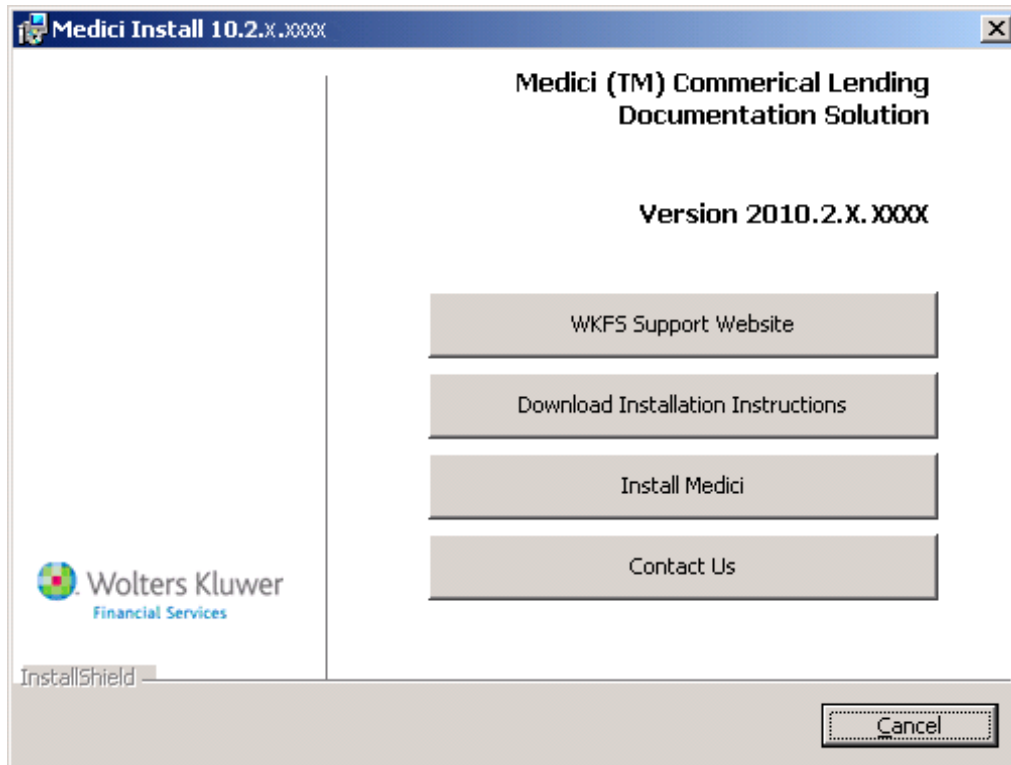
Install Choices

1. To begin the installation, place the Medici CD into the CD-ROM drive. If the installation does not automatically start, browse to the root of the CD and double-click **Medici_Setup.exe**.

Note: If you are installing onto Windows Vista 32-bit, Windows 7 Professional 32- or 64-bit, or Windows Server 2008 32- or 64-bit, right-click **Medici_Setup.exe** and select **Run as Administrator** from the context menu.

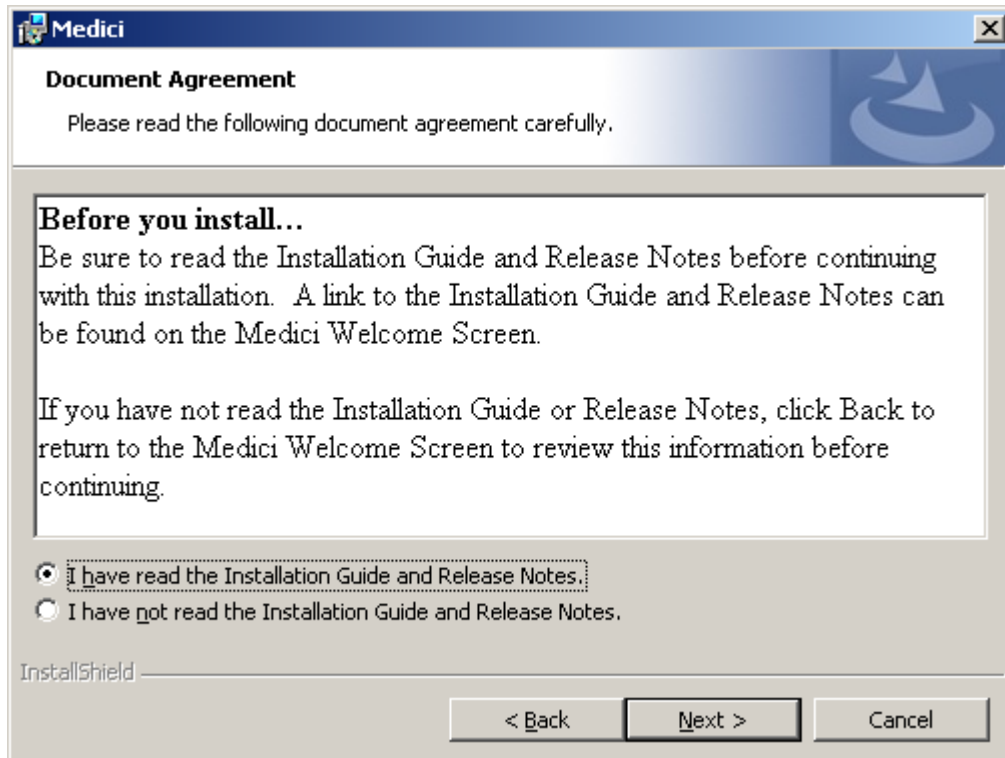
If you double-click the setup file, you will be asked for Administrator permissions.

2. The Medici Install window will display followed shortly by the installation **Welcome** window.



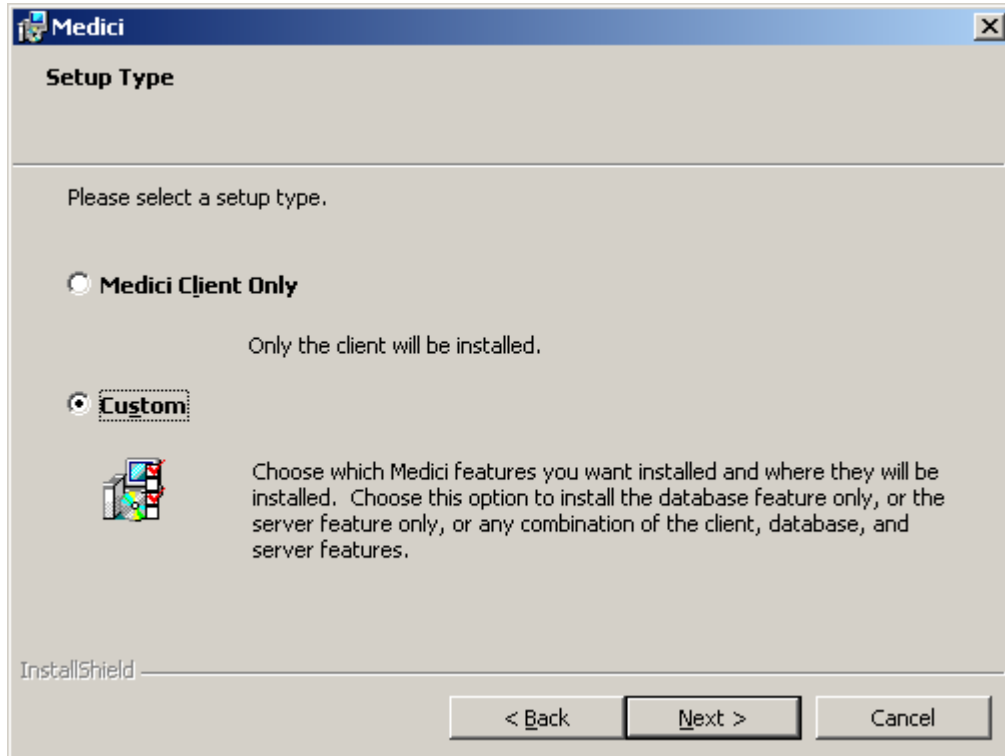
Please continue to read this Installation Guide as well as the Release Notes before proceeding with the installation. If you have any questions, click **Contact Us** for mailing, phone, fax, and web-based contact options. When you are ready to continue the installation, click **Install Medici**.

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



Click Next.

4. Select the Setup Type for your installation. If you are upgrading from 2010.1 to 2010.2 you will not see this screen.

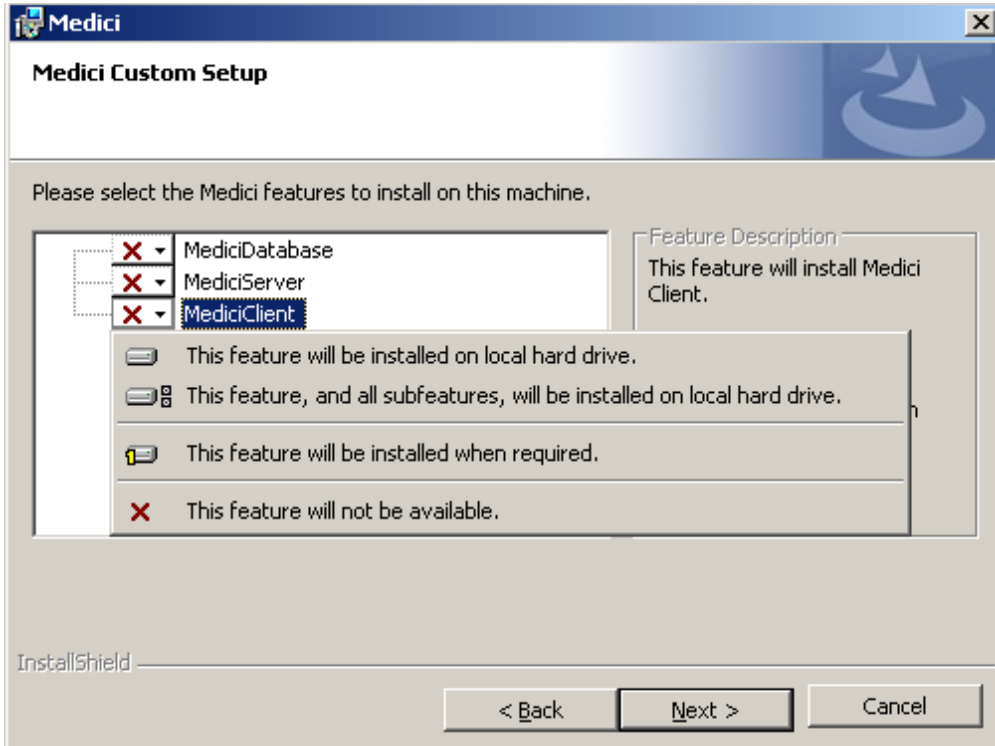


Each selection will give you different installation options:

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

Click **Next**.

5. Select the desired features that you want to install or upgrade. This screen only appears, if you selected **Custom**. If you are upgrading from 2010.1 to 2010.2 you will not see this screen.



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

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

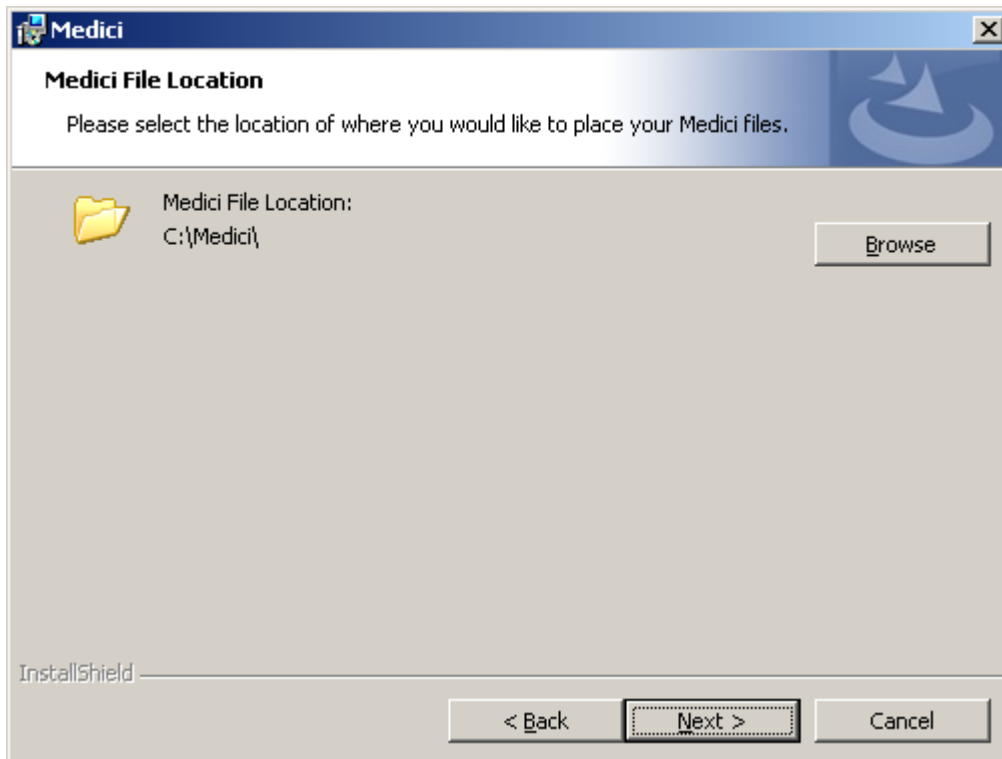
Configuration	Features
Standalone	Select all three features: MediciDatabase, MediciServer, and MediciClient.
Remote database with server/client on another machine	Select all three features: MediciDatabase, MediciServer, and MediciClient.
Separate database and server	Install the server at the server machine.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

Configuration	Features
	or at the machine hosting SQL Server. Choose MediciDatabase only.
Server only	Install the server at the server machine. Choose MediciServer only. Do not choose MediciClient.
Client only	Choose only MediciClient and install at each client machine.

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

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

6. Click **Next**. The installation program will check if Microsoft .NET Framework 1.1 and 2.0 are installed. For new installations the installation will halt if these pre-requisites are not installed. Please visit the [Pre-Install](#) section of this guide.
7. Browse to the location where you want to install Medici on your system. If you are upgrading from 2010.1 to 2010.2 you will not see this screen; the installation will use your existing file location.



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

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

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

8. Click Next.

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

Database Installation

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

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

Medici Database Server

In order to upgrade or install the Medici database, please enter the following information.

Please select the SQL server instance for the Medici database:

MLTWH\SQLEXPRESS Browse...

Connection information to upgrade or install the Medici Database:

Windows Authentication

SQL authentication using Login ID and password below:

Login ID:

Password:

NOTE: See installation instructions for details on the SQL permissions needed to perform an upgrade or new install of the Medici database.

InstallShield

< Back Next > Cancel

Select the authentication type you use:

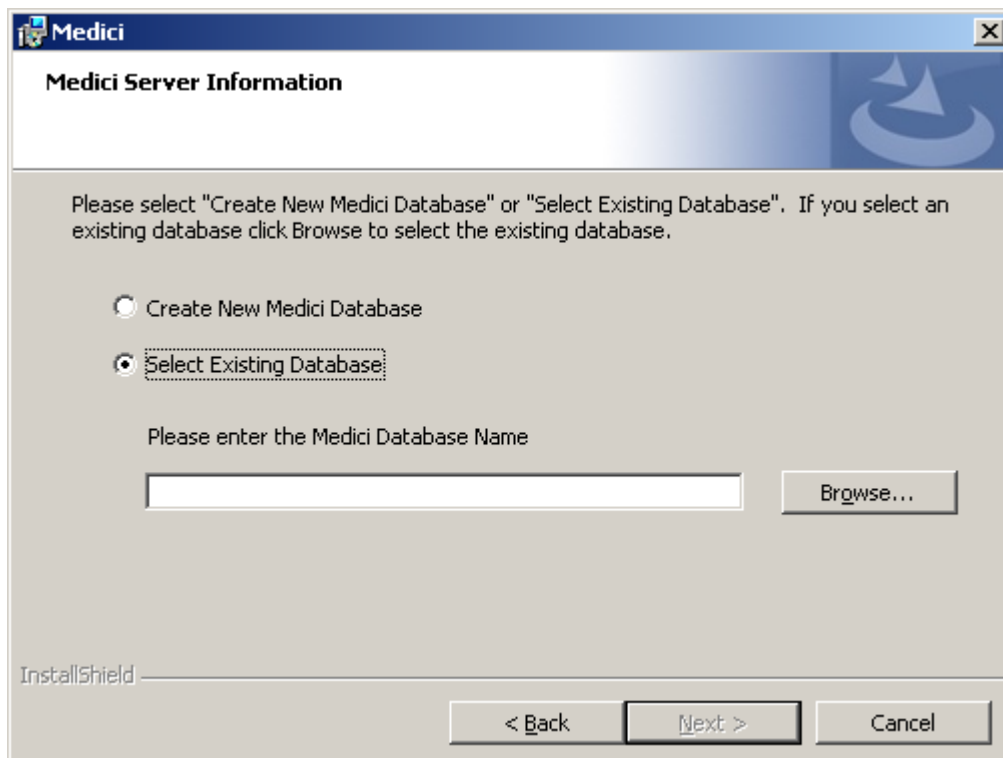
- Windows Authentication. The credentials of the user currently logged into the machine from where this install is being performed will be used. This option is selected by default.
- SQL Authentication
 - Login ID: Login ID must be a valid SQL Server Login that has access rights to the Medici SQL Server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

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

For a new install, the credentials entered must have "DB_Creator" rights.

Click Next.

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

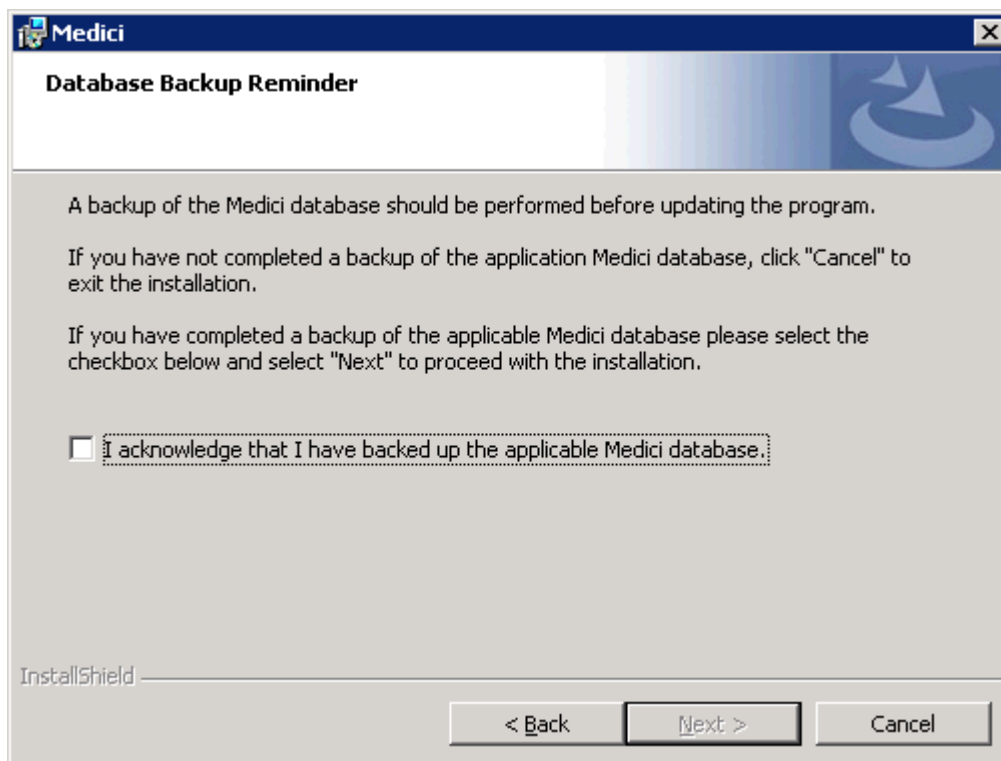


If you are doing a new install, you will select **Create New Medici Database** and proceed to the [For New Databases](#) section of this guide for the next steps you need to perform after clicking **Next**.

If an existing database is chosen, you will need the database catalog name. Click **Browse** to locate an existing database from the SQL server instance.

Click **Next**.

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

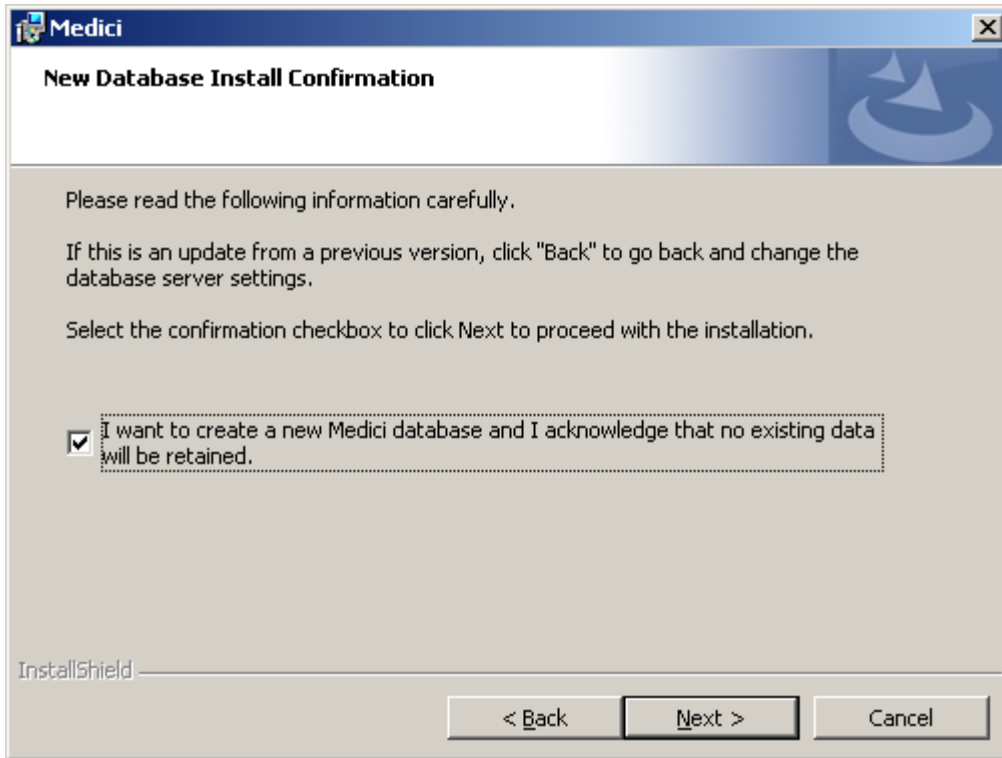


Click **Next**.

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

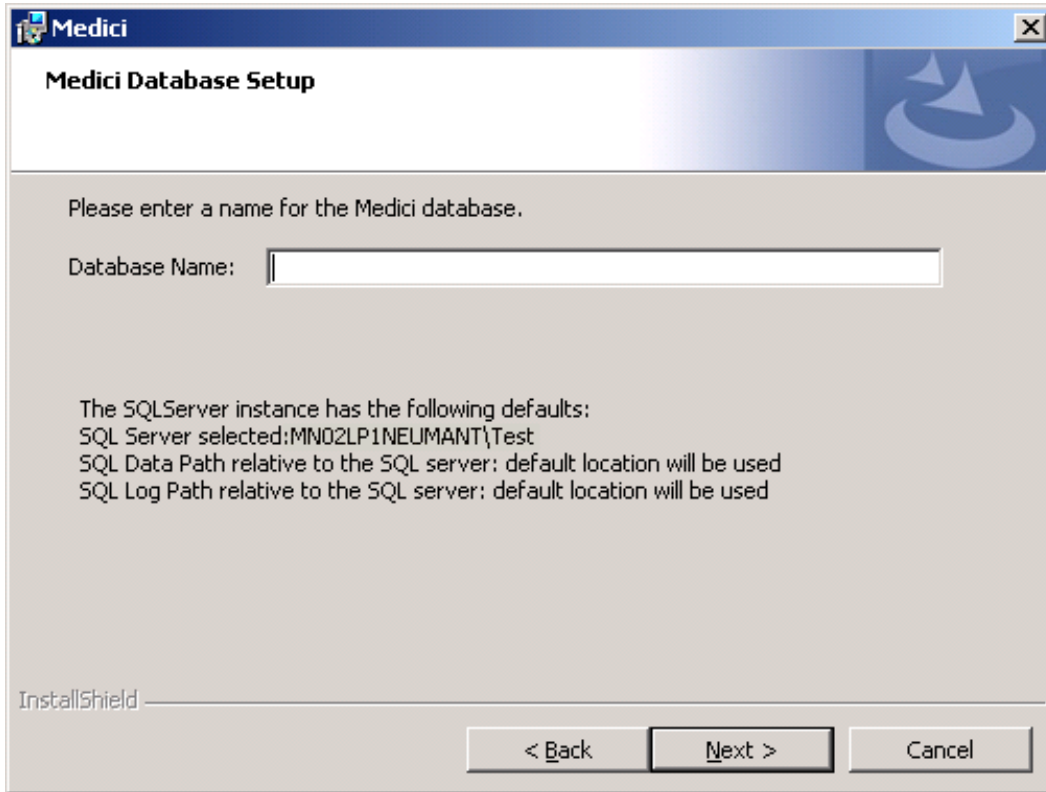
For New Databases

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



Click **Next**.

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

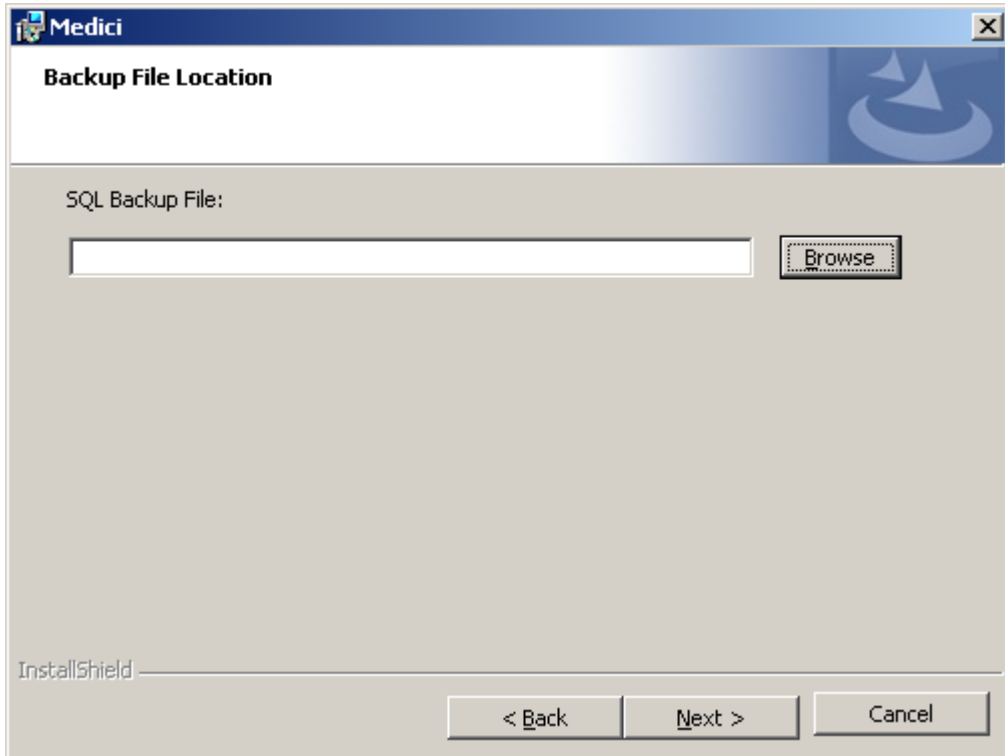


The screen displays the fully qualified SQL Server instance name where the Medici database will be installed.

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

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

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



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

Click **Next**.

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

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

Server Installation

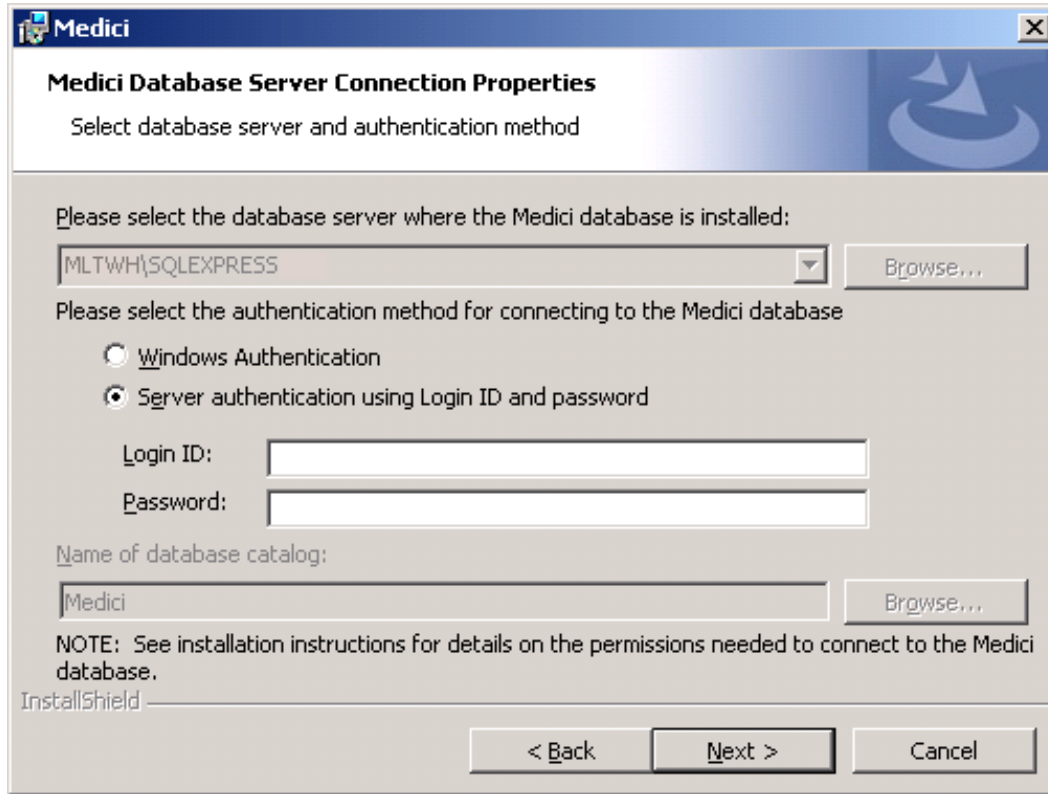
The Medici server installation process and steps are applicable if you have chosen to install the Medici Server feature on the **Medici Custom Setup** screen. This applies to both new and update installations.

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

1. As noted in the pre-installation section of this guide, you will need the location for your Encryption Key files and the file location for your license file. This information is required for both new and updating institutions. Use **Browse** to navigate to the locations. If you are upgrading from 2010.1 to 2010.2 will not see this screen since Medici already knows the location for these files.

The screenshot shows a Windows-style dialog box titled "Medici" with the subtitle "Key File Location and License File Location". The dialog has a blue header bar with the Medici logo on the right. The main area is light gray and contains two sections of text. The first section says "Please select the location where the Encryption Key files are to be placed:" followed by a text input field labeled "Key File Location:" and a "Browse" button. The second section says "Please select the location where the License file was placed:" followed by a text input field labeled "License File Location:" and a "Browse" button. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". In the bottom left corner, the "InstallShield" logo is visible.

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



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

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

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

5. Click **Browse** to select the Medici database from the selected SQL Server. Click **Next**. The install will now verify the SQL connection and will display an error message if the connection is not

verified. Edit your connection information until the install can verify a successful connection with the SQL database.

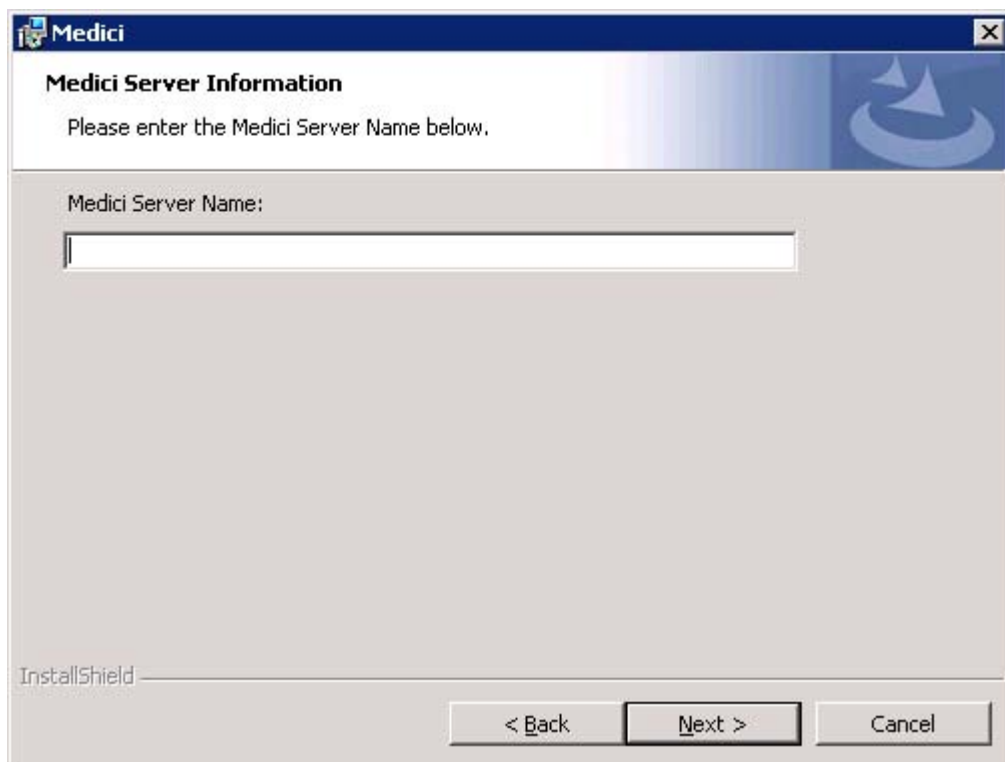
This completes the collection of information needed for the installation of the Medici server.

Client Installation

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

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

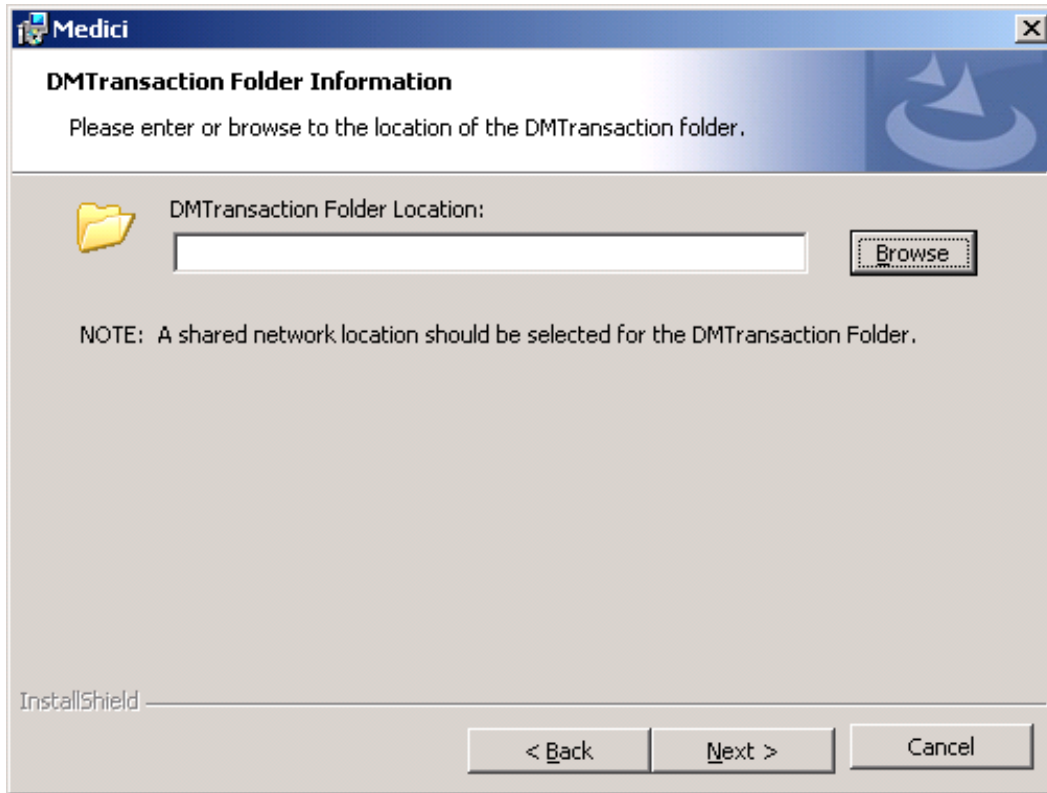
1. Enter the network name or the IP address of the server hosting the Medici server installation.



The screenshot shows a Windows-style dialog box titled "Medici" with a close button (X) in the top right corner. The main heading is "Medici Server Information". Below the heading, the text reads "Please enter the Medici Server Name below." There is a text input field labeled "Medici Server Name:" with a cursor inside. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted. In the bottom left corner, the text "InstallShield" is visible.

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

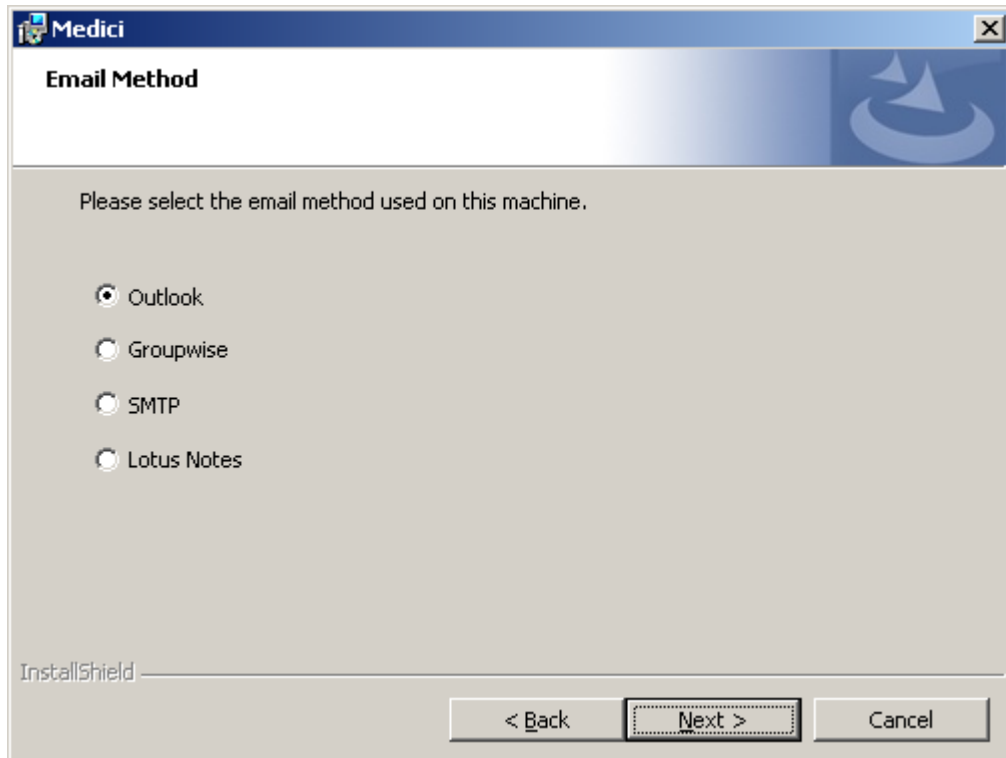
Note: For most configurations the DMTransaction folder should be on a shared network location so all Medici clients can access and share transactions.



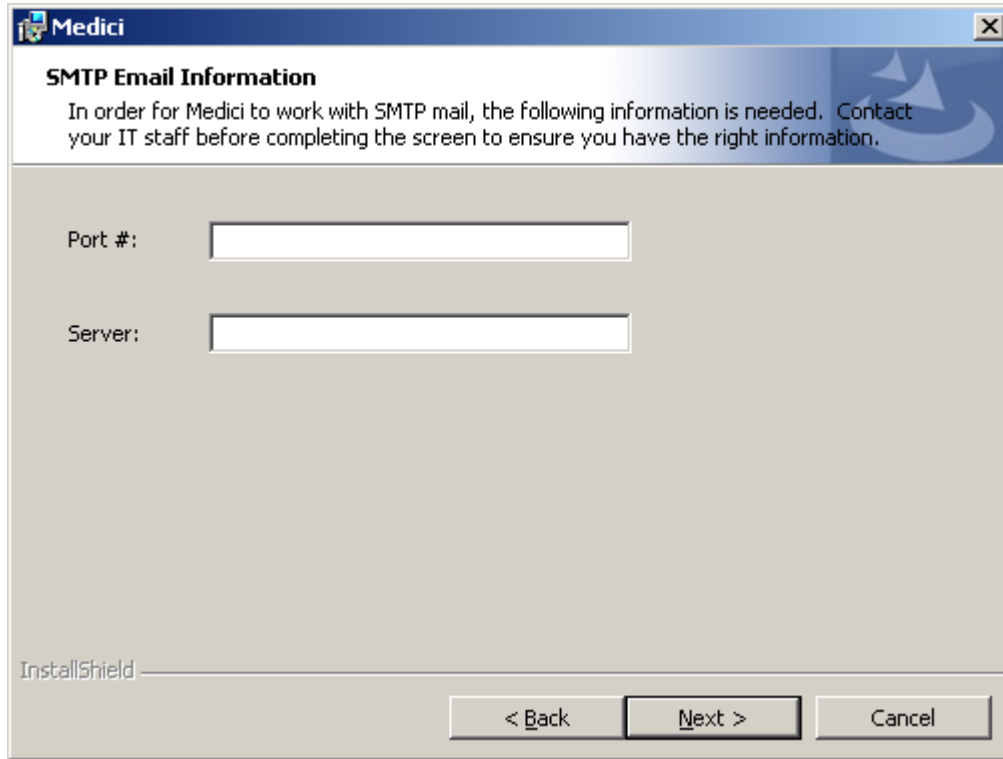
4. Click **Next**.

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

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



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

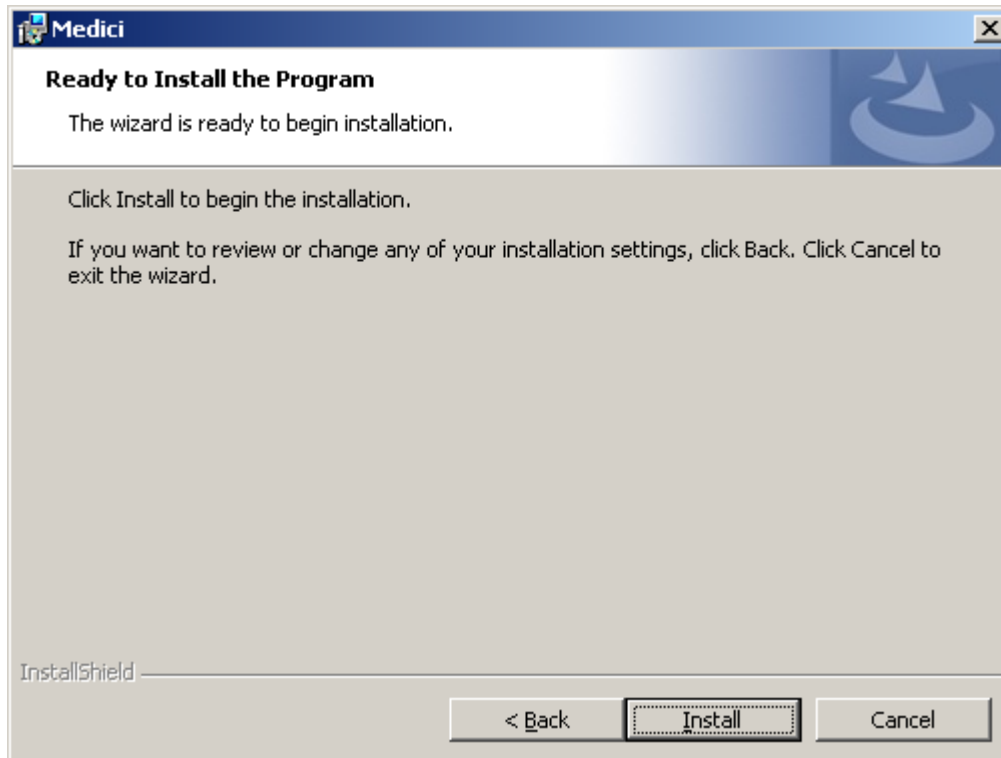


7. Click **Next** to complete the collection of information for the client install.

A few more steps are required for the installation to complete.

Finishing the Install

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



1. Click **Install**. This begins the installation of Medici based on the options you have chosen.

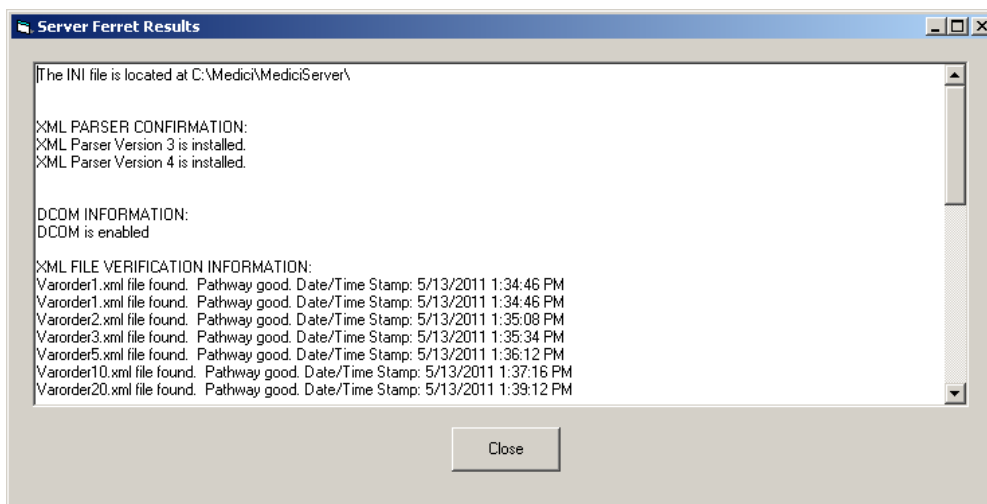
Note: If you have selected to update the database feature, the installation checks for the presence of both the SQL Server Native Client and the SQL Shared Management Objects, both the 2005 and 2008 R2 versions of each. If any of these four packages is not found, the Medici install will begin the installation of any missing package. This may require a restart of your machine and you will have to restart your Medici install. We recommend installing all of these prior to beginning your Medici install.

2. For an upgrade, if you selected the Database feature then the install will upgrade your database.

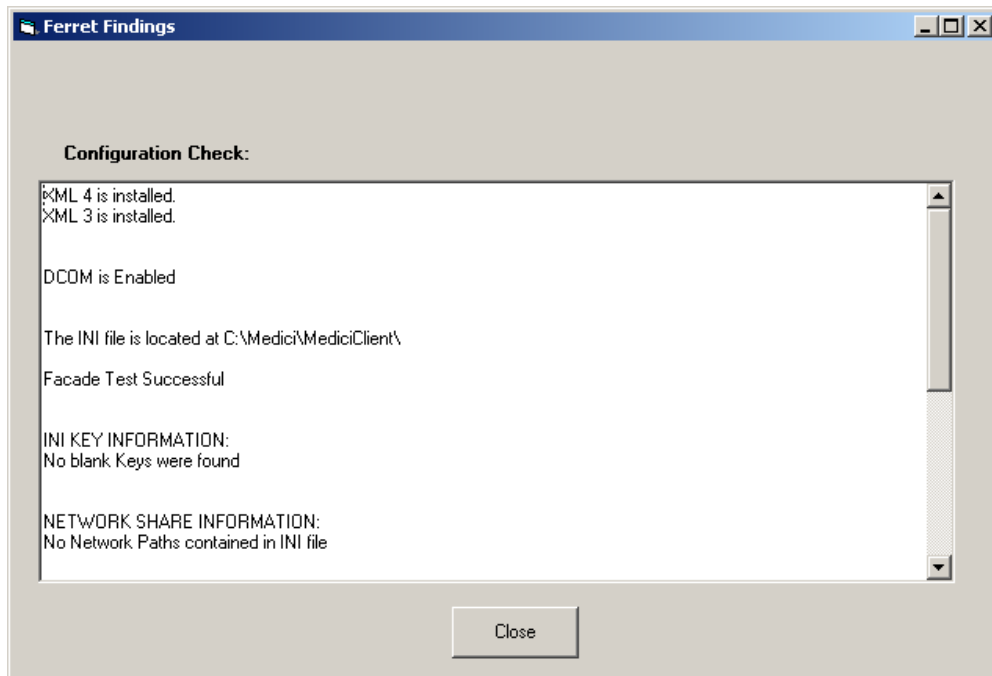


Note: The Medici Upgrade window may appear behind the install screen. You may have to look behind the install screen to see if the upgrade is finished.

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



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



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

Post-Install Configuration

After installing Medici Release 2010.2, you will need to perform some tasks before using the Medici application.

Exclude the Medici Client Directory from Anti-Virus Scanning

Anti-virus software that performs real-time file scanning while running on a machine that hosts the Medici Client negatively impacts the performance of Medici. Therefore, exclude the Medici Client directory, and all child directories, from any real-time anti-virus file scanning.

Configure Component Services

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

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

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

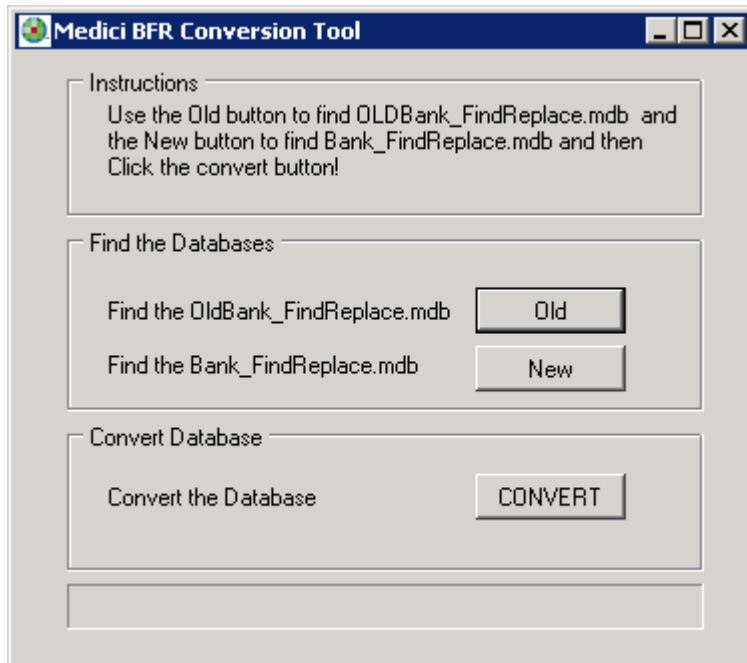
BankFindAndReplace

Important: Only those doing new installations or upgrading from Medici 3.x to 2010.2 will need to run this Medici BFR Conversion tool.

If you are upgrading from 2010.1 to 2010.2, the installation program has already performed these steps.

Run the Conversion Tool

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



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

Restore Custom Files for 3.x to 2010.2 Upgrades

This section is applicable only if you are upgrading from 3.x to 2010.2.

Server Files and Folders

In the pre-install section of this document you were asked to backup files from your Medici server into a folder named **Custom Files**. Copy some of those backed-up files from the **Custom Files** folder into your new or updated Medici server folders:

- Userdocs folder (if available)
- NumToText.XML (if available), into the MediciServer folder
- Barcoding info.xml, into the DMTransaction\Templates folder

Files that were backed up in the pre-install section but are not present on the above list should be retained for reference only at their original backup location. Do not restore any files except those listed here.

Client Files and Folders

In the pre-install section of this document you were asked to backup files from your Medici client into a folder named **Custom Files**. Copy some of those files from the **Custom Files** folder into your new or updated Medici client folders:

- Macros.ini (if available) and RMDisplayVars.xml into the MediciClient folder
- Mbnk.mdb into the MediciClient\Databases folder
- UFormat.ini, BankSpecific.dot, BankUseOnlyText.rtf, amort.xls, and any and all .bmp files, that is, logos into the MediciClient\Word Automation folder

DMTransaction Folder

If you are installing multiple clients, you only need to perform the steps in this section once after the first client install. Do not repeat them for every client. The purpose of these steps is to make certain the updated files get copied over onto all the other client workstations automatically.

1. Create a new folder called 1.0 in the DMTransaction\DocumenterUpdateFolder location.
2. Place the following files from the client **Custom Files** folder you were asked to create in the pre-install section of this guide into the 1.0 folder:
 - Bank_FindReplace.mdb (from the BFR Backup folder of the machine used to perform the conversion. Only use the file present after the conversion process. Do not use the file if the conversion process has not yet been run.)
 - Bank_Specific.dot (if available)
 - Logo001.bmp and any other logo files (if available)
 - Uformat.ini (if available)
 - Mbnk.mdb (if available)
 - Macros.ini, RMDisplayVars.xml and BankUseOnlyText.rtf (if available)

Update DMTransaction Folder for 2010.1 to 2010.2 Upgrades

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

1. Create a new folder called 1.0 in the DMTransaction\DocumenterUpdateFolder location.
2. Place the following files from an updated client **Custom Files** folder you were asked to create in the pre-install section of this guide into the 1.0 folder:
 - From the MediciClient\Word Automation folder:

- Bank_FindReplace.mdb
- Bank_Specific.dot
- BankUseOnlyText.rtf
- Logo001.bmp and any other logo files
- Uformat.ini
- Mbnk.mdb (from the MediciClient\Database folder)
- Macros.ini and RMDisplayVars.xml from the MediciClient folder

Un-install Medici 2010.2

This section describes how to remove (un-install) the Medici application. The un-install behavior described in this section is only applicable to Medici 2010.2 install. For un-installing 3.x Medici versions, see [Medici Previous Version Uninstall](#).

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

Some files and folders remain behind when uninstalling Medici features:

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

- uformat.ini
- Barcoding info.xml
- Amort.xls
- lw.ini
- BankUseOnlyText.rtf
- RMDisplayVars.xml

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

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

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

Un-Installing Medici 2010.2

To remove Medici:

1. From the Windows Start button, select **Control Panel, Add or Remove Programs**.
2. From the **Currently Installed Programs** list, click the Medici application.
3. Click **Change/Remove**.
4. You will be asked to confirm removal. Click **Yes**.
5. The Medici application is uninstalled.

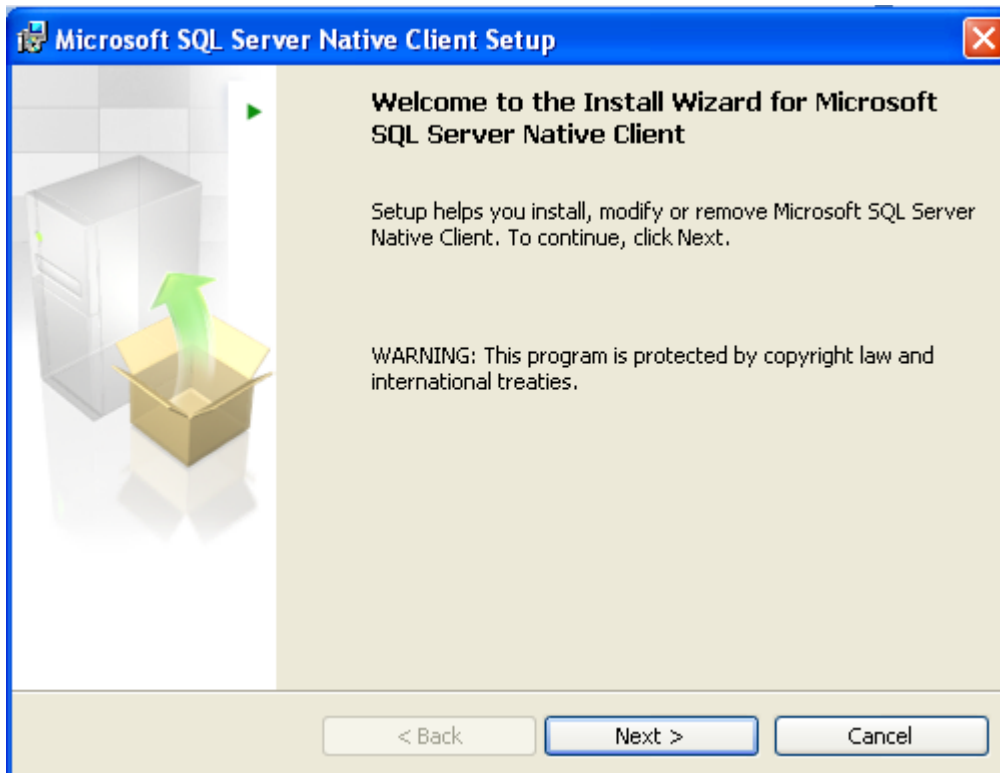
Appendix A: SQL Server Native Client Install

The instructions in this appendix apply to the installation of both SQL Server 2005 Native Client and SQL Server R2 2008 Native Client. Both installations are identical. The screenshots in this appendix are for the 2008 R2 Native Client.

The installation program for SQL Server R2 2008 Native Client is available at <http://www.microsoft.com/downloads/en/details.aspx?FamilyID=ceb4346f-657f-4d28-83f5-aae0c5c83d52&displaylang=en>. The installation program for SQL Server 2005 Native Client is available at <http://www.microsoft.com/downloads/en/details.aspx?familyid=df0ba5aa-b4bd-4705-aa0a-b477ba72a9cb&displaylang=en>.

Run the SQL Server Native Client installer on the machine from which you will be upgrading your Medici database. To install the SQL Server Native Client:

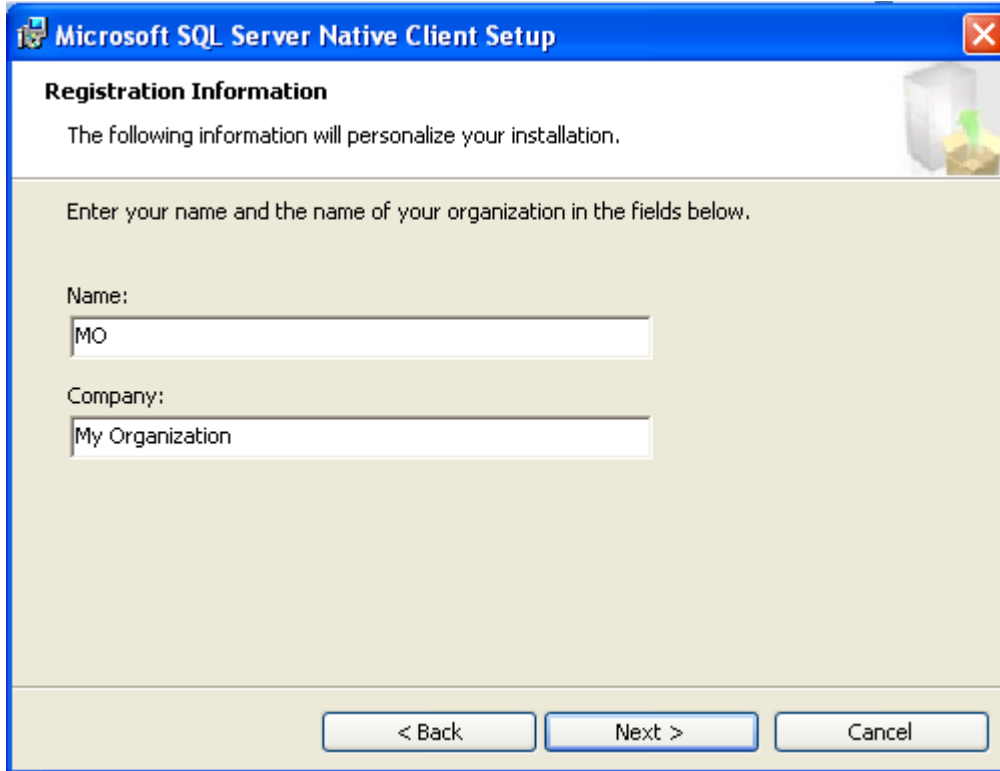
1. Double-click the downloaded .exe file. If the file has an .msi extension, right-click and choose install. The Welcome window is displayed.



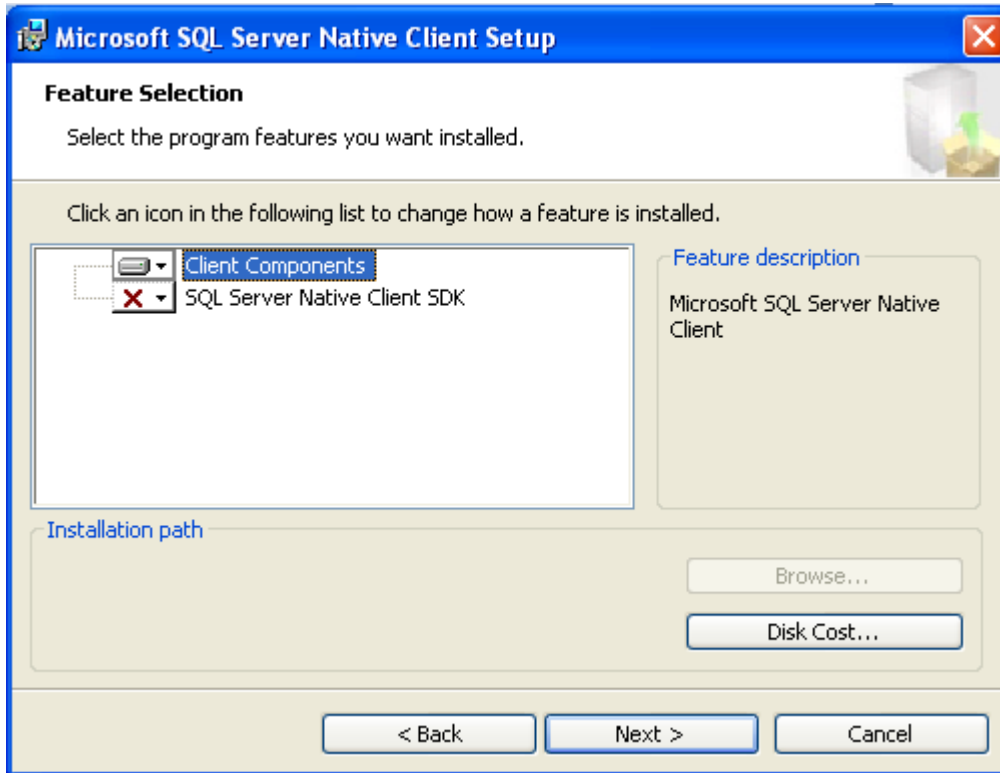
Click Next.

2. Accept the license agreement and click Next.

3. To personalize the installation, enter your name and the name of your organization and click **Next**.



4. Select the **Client Components** option.



Click **Next**. The program is now ready to install.

5. Click **Install** to begin the installation.
6. The progress of the installation can be followed on screen.
7. Once the installation is complete, you will see a screen indicating the installation of SQL Server Native Client is complete. Click **Finish** to complete the installation.

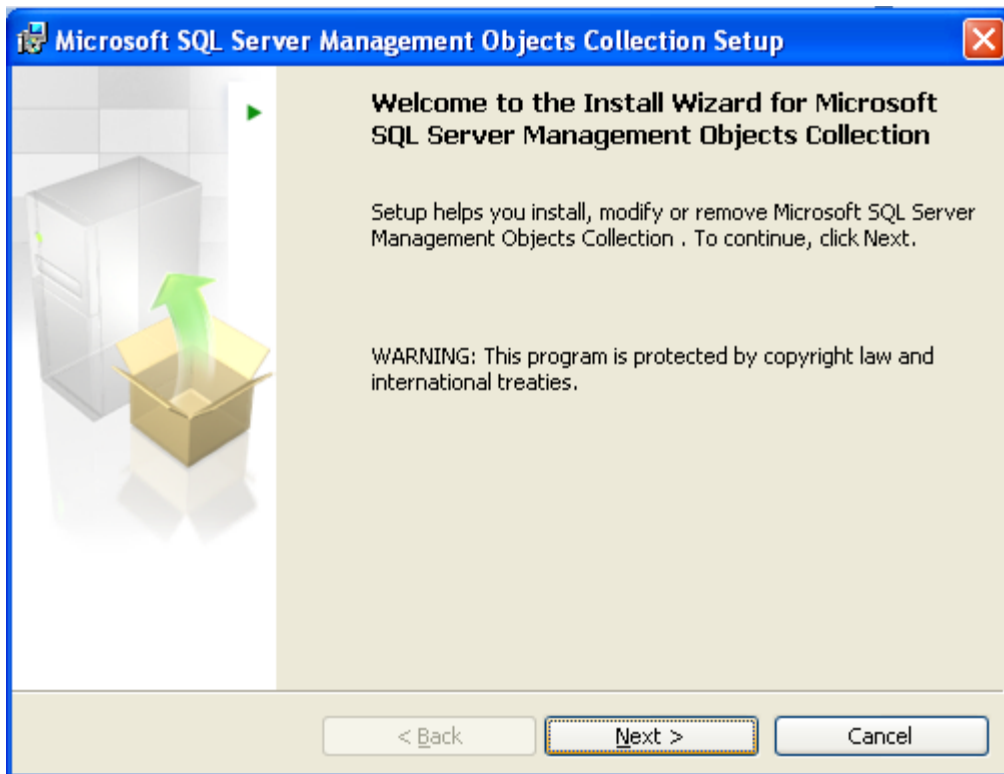
Appendix B: SQL Server Management Objects Collection Install

The instructions in this appendix apply to the installation of both the SQL Server 2005 Management Objects Collection and the SQL Server 2008 R2 Shared Management Objects Collection. Both installations are identical. The screenshots in this appendix are for the 2008 R2 version.

The installation program for SQL Server Management Objects Collection is available at <http://www.microsoft.com/downloads/en/details.aspx?FamilyID=ceb4346f-657f-4d28-83f5-aae0c5c83d52&displaylang=en>. The installation program for SQL Server 2005 Management Objects Collection is available at <http://www.microsoft.com/downloads/en/details.aspx?familyid=df0ba5aa-b4bd-4705-aa0a-b477ba72a9cb&displaylang=en>.

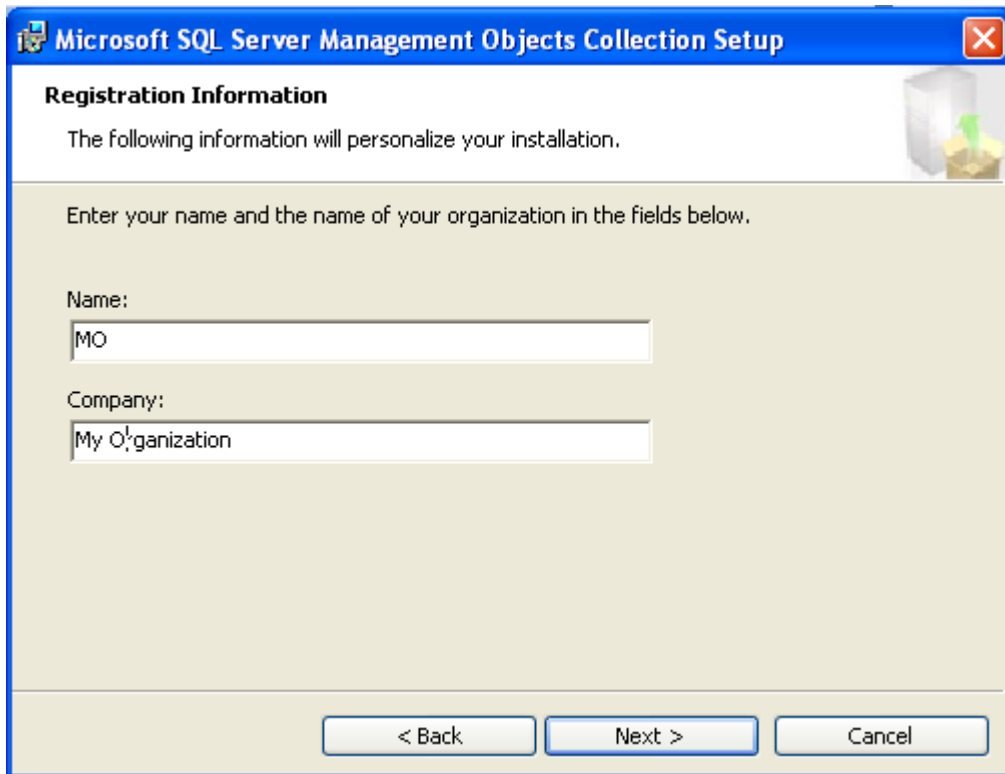
Run the SQL Server Management Object Collection installer on the machine from which you will be upgrading your Medici database. To install SQL Server Management Objects Collection:

1. After computing the space requirements for install, the Welcome window is displayed.



Click Next.

2. To proceed with the installation you must accept the license agreement. Click **Next**.
3. To personalize the installation, enter your name and the name of your organization and click **Next**.



4. Click **Install** to begin the installation.
5. The progress of the installation can be followed on screen.
6. Once the installation is complete, you will see a screen indicating the installation of SQL Server Management Object Collection is complete.
7. Click **Finish** to complete the installation.

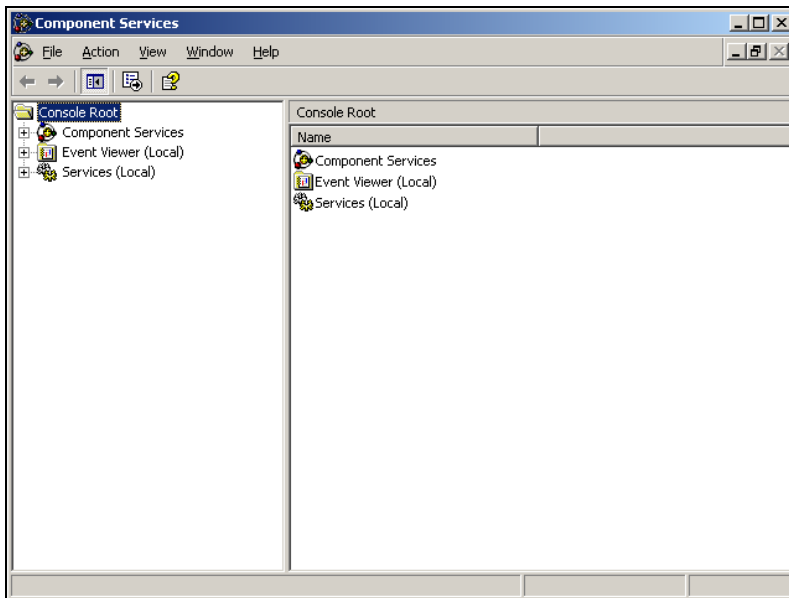
Appendix C: Configure Component Services

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

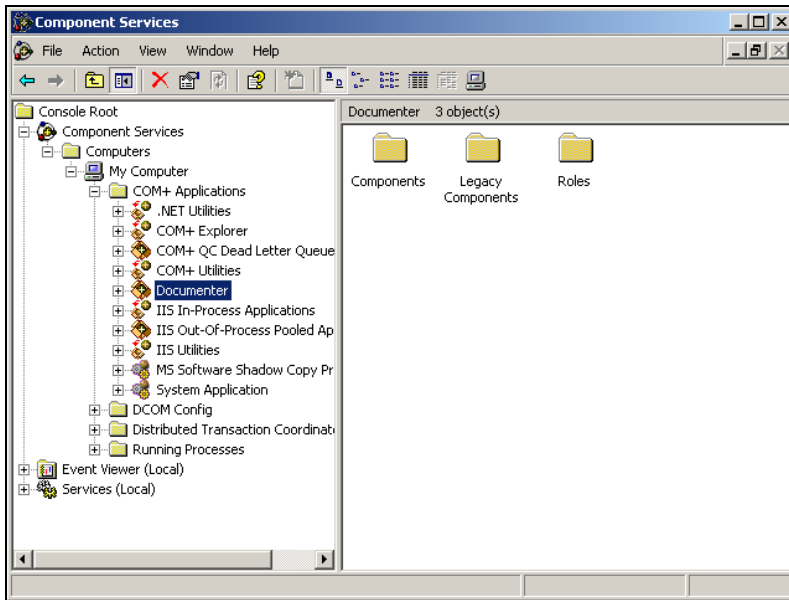
These instructions demonstrate how to configure user rights for the COM+ components following an installation of the Medici Server.

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

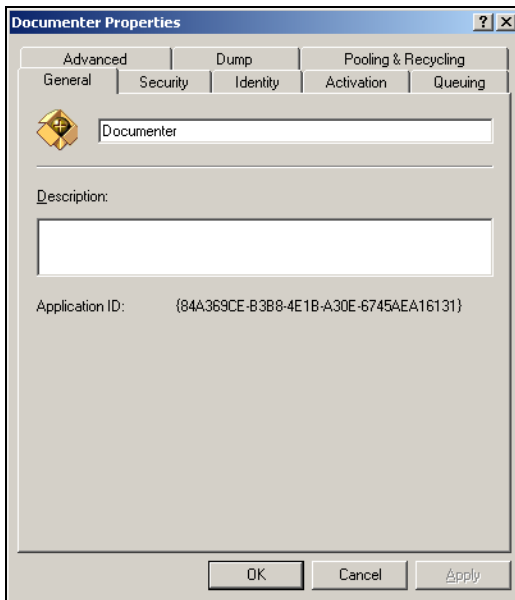
1. To open Component Services, from your desktop click **Start**, click **Control Panel**, double-click **Administrative Tools**, and then double-click **Component Services**. The **Component Services** window appears.



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



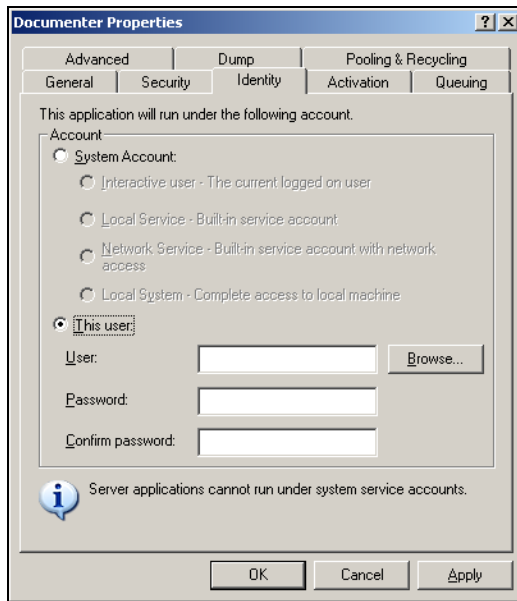
3. Right-click the **Documenter** Medici COM+ object and select **Properties**. The **Documenter Properties** window appears.



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

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

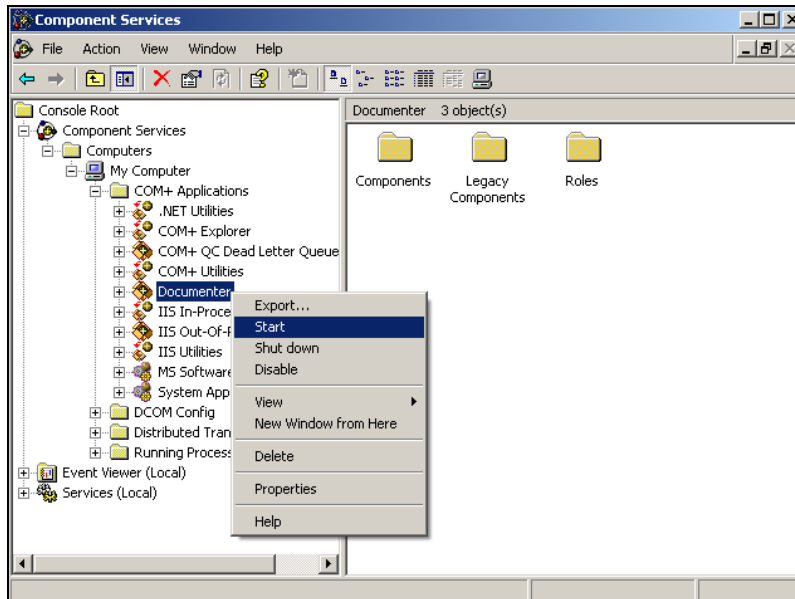
To make your setup work easier, you can also click **Browse** to select a user who has sufficient rights and permissions to be a Local Domain Administrator. This administrator is able to log into the application server, to run the Application Component, and to access any files or folders used by Medici,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



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

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

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

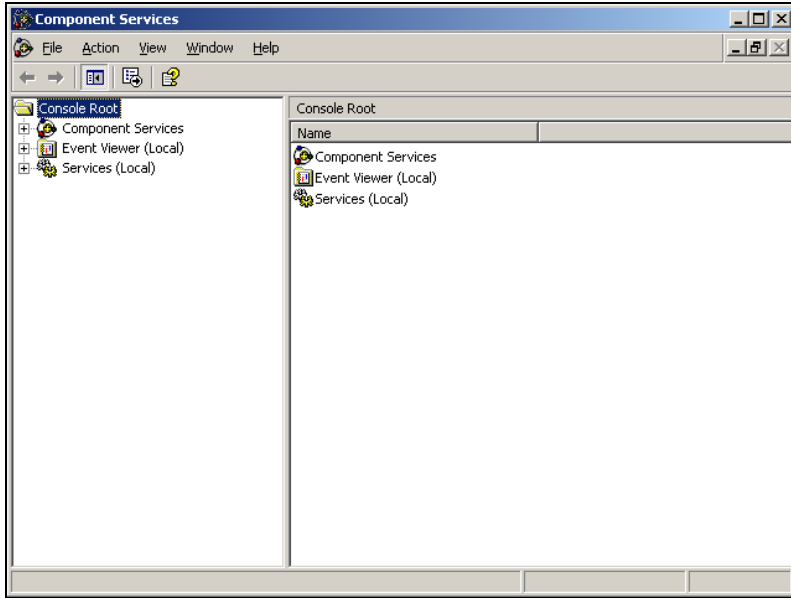


Create a Missing COM+ Object

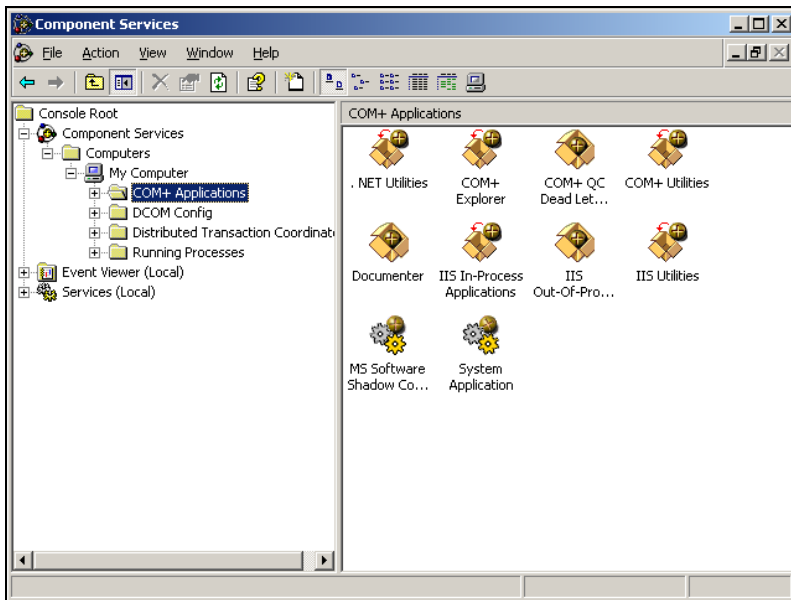
Create the COM+ object only on the machine where you installed the Medici Server, and only if the Medici Client does not exist on the same machine. Medici users will have difficulty with communications if the COM+ object for Medici does not exist on the machine where you installed the Medici Server.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

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

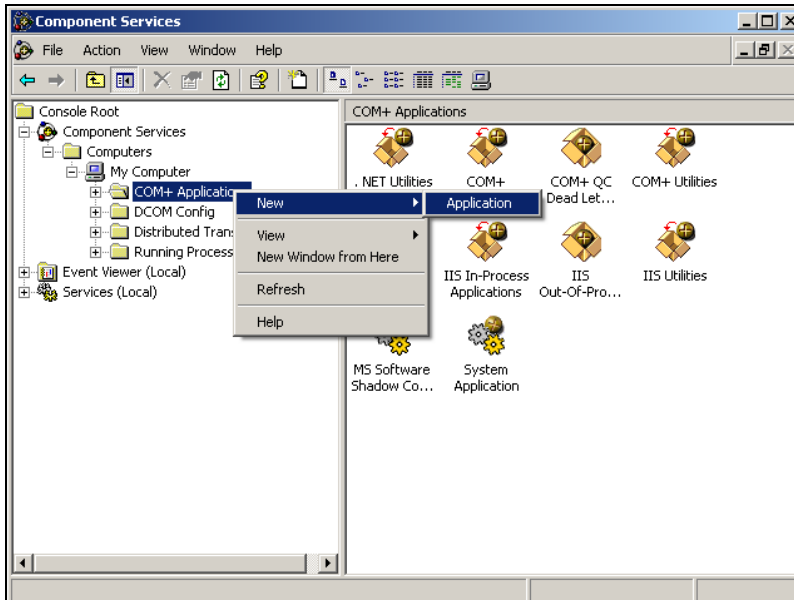
1. To open Component Services, click **Start**, click **Control Panel**, click **Administrative Tools**, and then double-click on **Component Services**. The **Component Services** window appears.



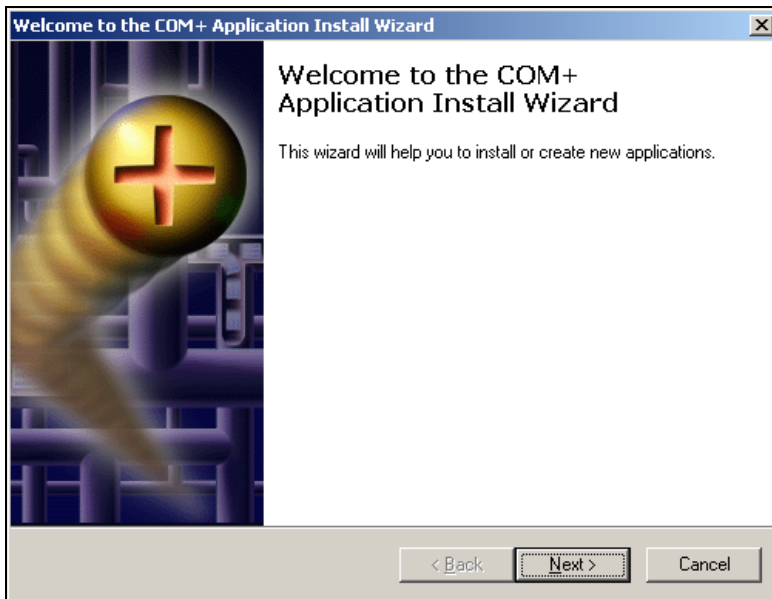
2. To open COM+ applications, expand the **Component Services** node, expand the **Computers** node, expand **My Computer**, and then expand **COM+ Applications**.



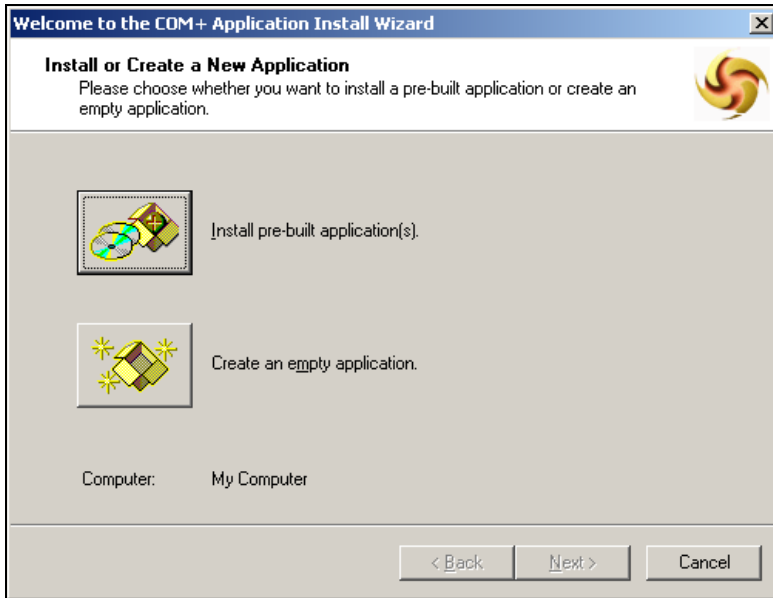
3. To create a new application folder, right-click **COM+ Applications** and select **New then Application** from the context menu.



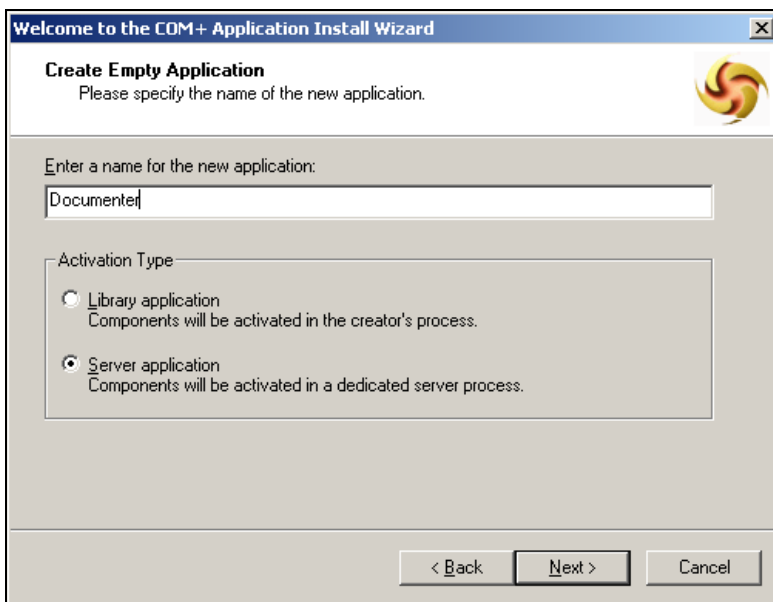
4. The Welcome to the COM Application Install Wizard window appears. Click Next.



5. Click Create an empty application.



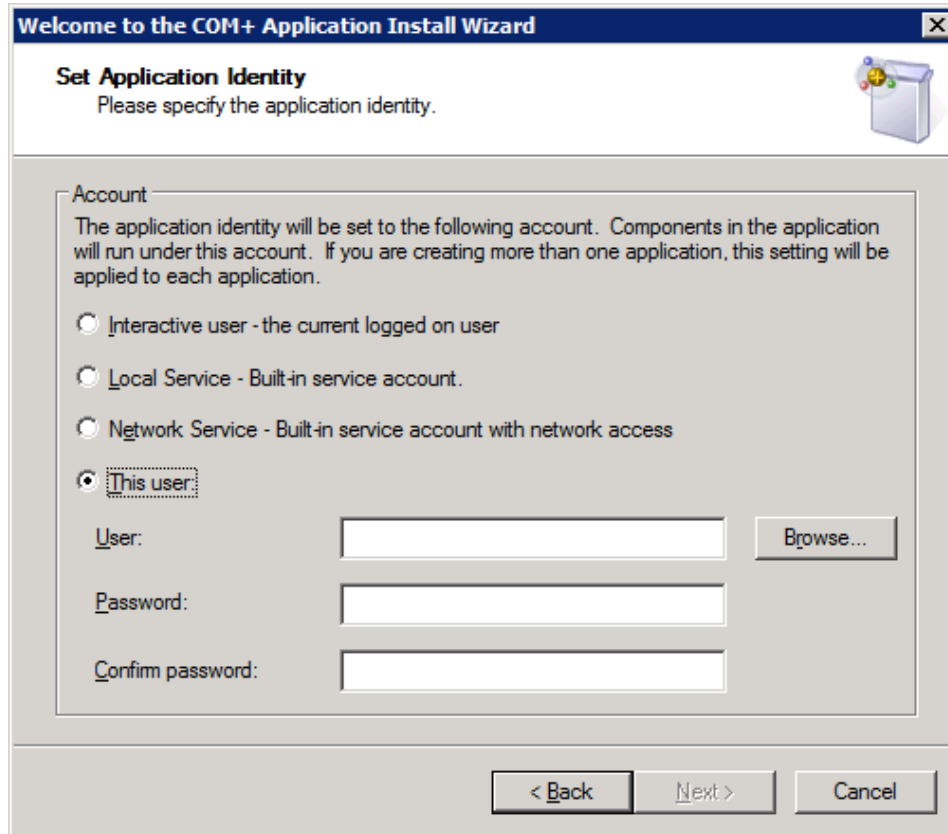
6. Type **Documenter** for the new application name. Select the **Server application** option and click **Next**.



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

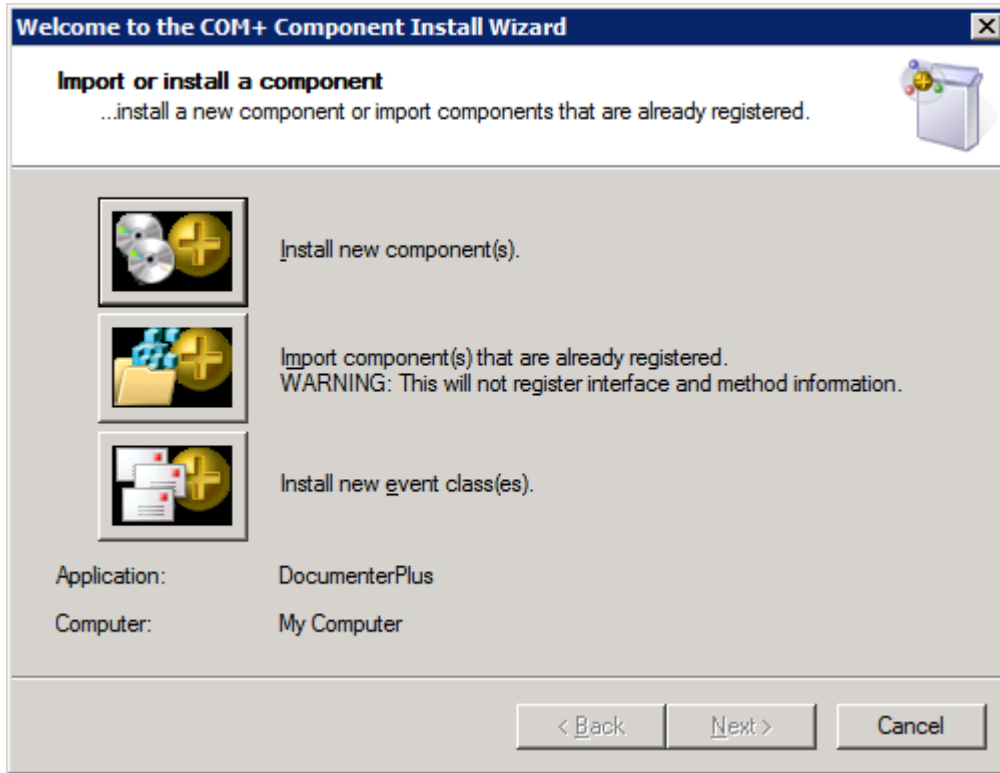
To make your setup work easier, you can also click **Browse** to select a user who has sufficient rights and permissions to be a Local Domain Administrator. This administrator is able to log into

the application server, to run the Application Component, and to access any files or folders used by Medici, but is restricted to operating only on the local machine.

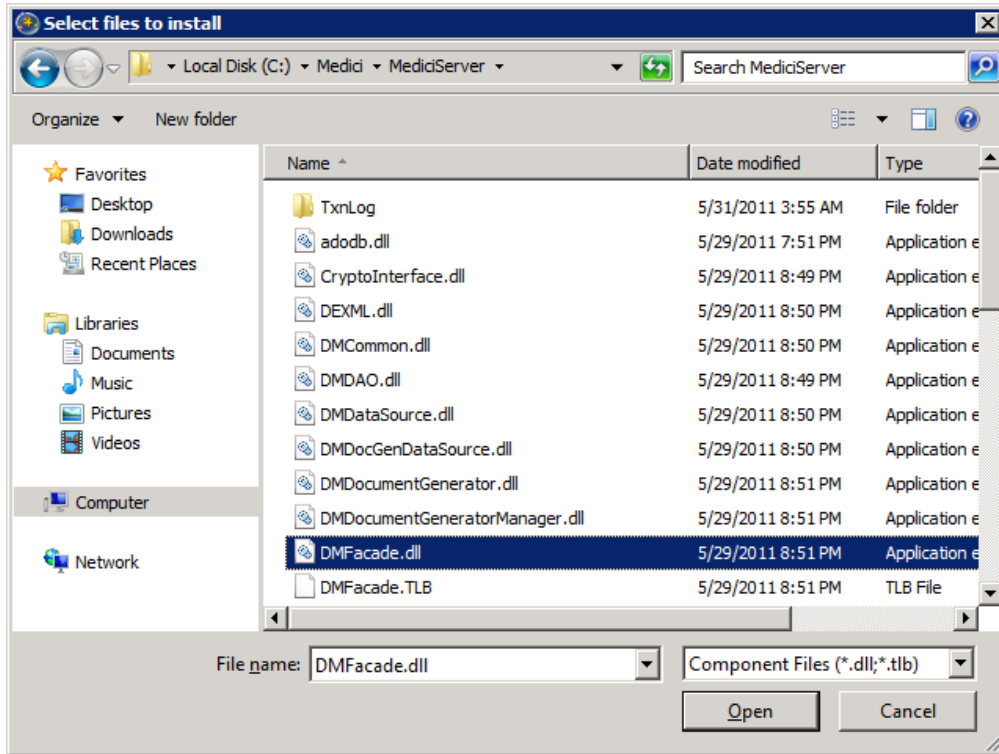


Important: If there is any problem with the administrator, select another user that has full access to both the folders that Medici uses and to the SQL Server. Access to the SQL Server is only necessary when using Windows Authentication, however. If no current user meets the defined requirements, or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

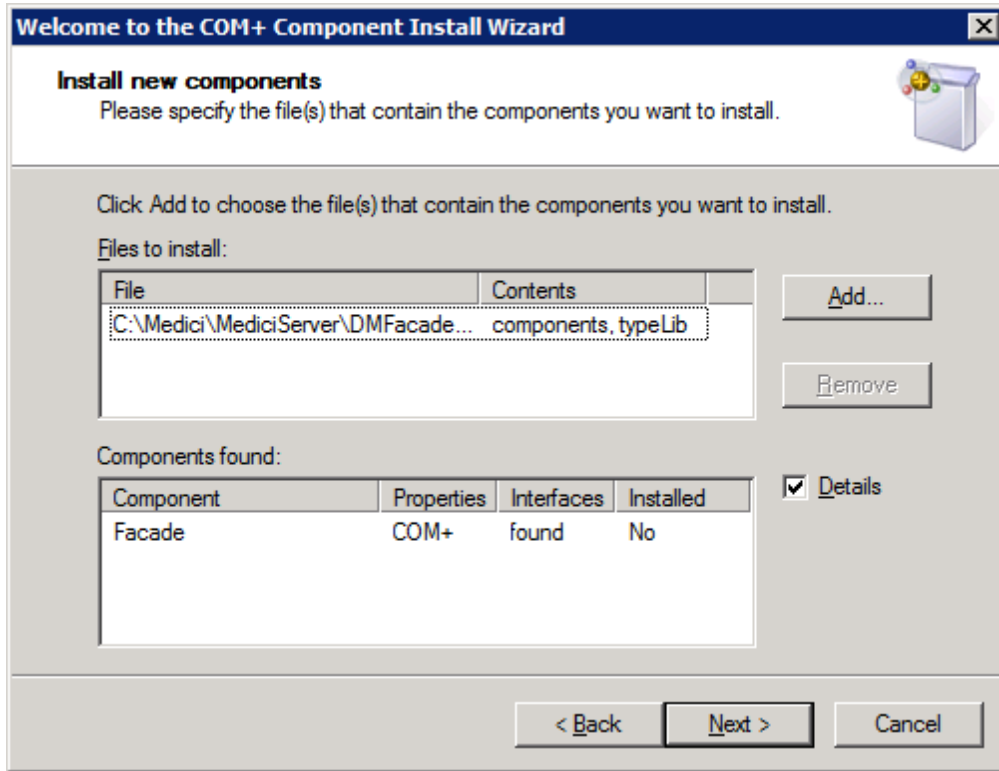
8. After you create or select a user, click **Next**.
9. If you are on Windows Server 2008, you will be asked to **Add Application Roles** and **Add Users** to the roles. Accept the default role, CreatorOwner, click **Next**, and accept the current user. Click **Next** and **Finish**.
10. If you are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



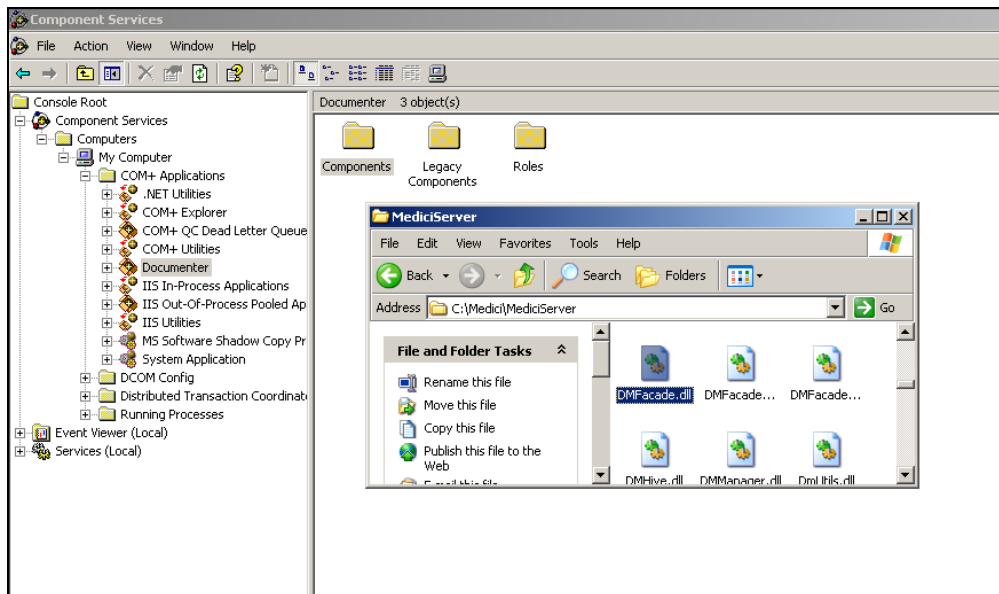
11. Choose **Import component(s) that are already registered** and browse to the location of **DMFacade.dll** in the **MediciServer** folder.



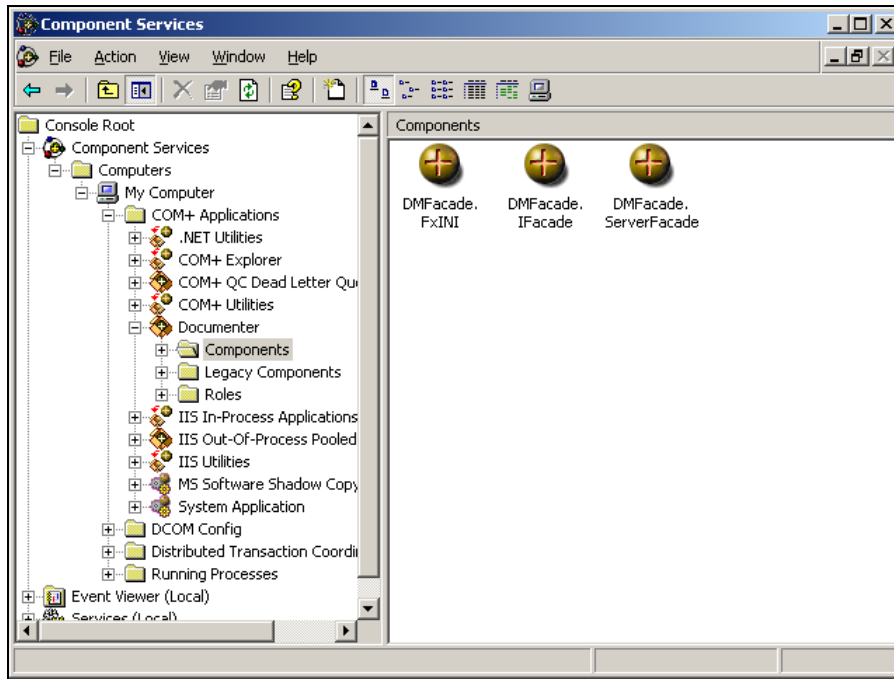
12. Click **Open**. DMFacade.dll has been added to the Files to Install list.



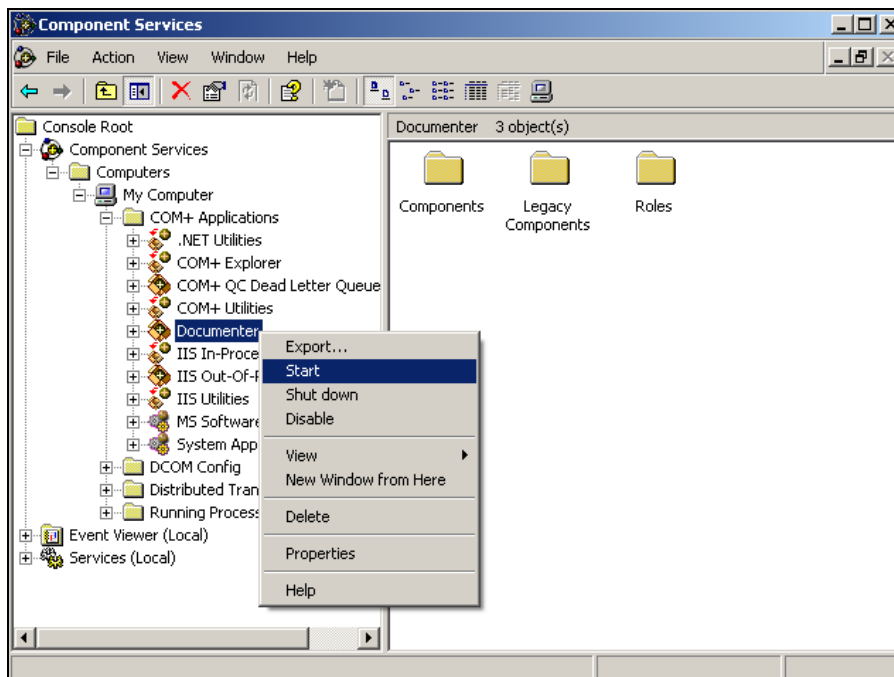
13. Click **Next** and **Finish** and **DMFacade.dll** will be installed as a component. Skip to Step 15.
14. Drag and drop the **DMFacade.dll** file from the **Medici Server Directory** location to the **Components** folder under the new **Medici** application, for example: **C:\Medici\MediciServer**.



15. Verify the component folder appears as follows:



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

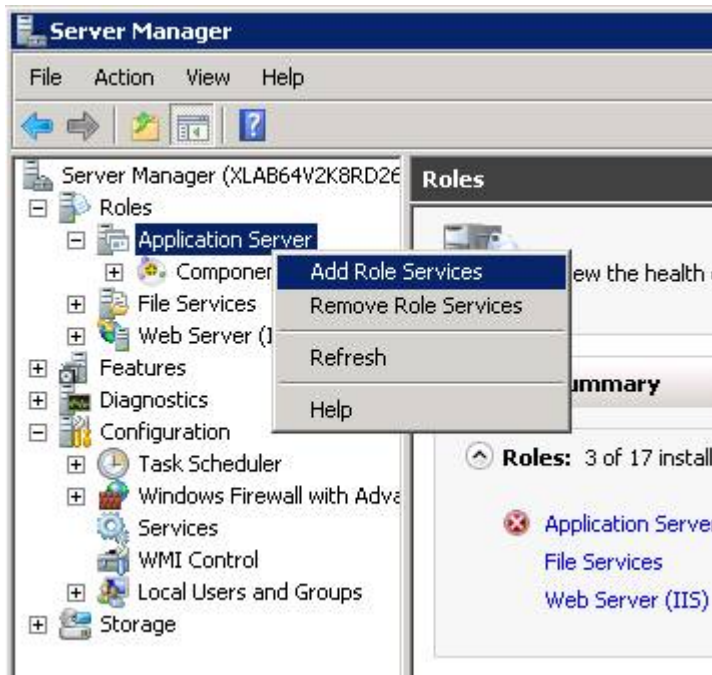


COM+ Disabled in Windows Server 2008

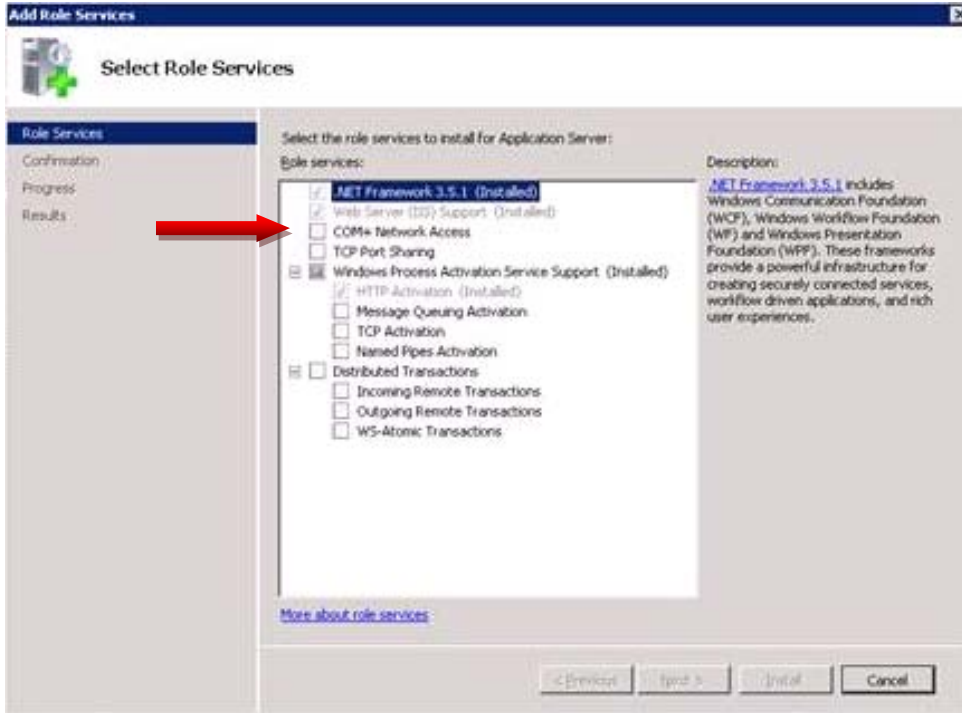
The Medici Server requires an enabled COM+. For both new and update users, COM+ may be disabled by default in Windows Server 2008 as shown by an error in the Event Viewer when attempting to start the component:



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



Select COM+ Network Access and click Install.



Appendix D: Configure Your Windows Server 2003 or 2008 for COM+ and the Medici Application Server

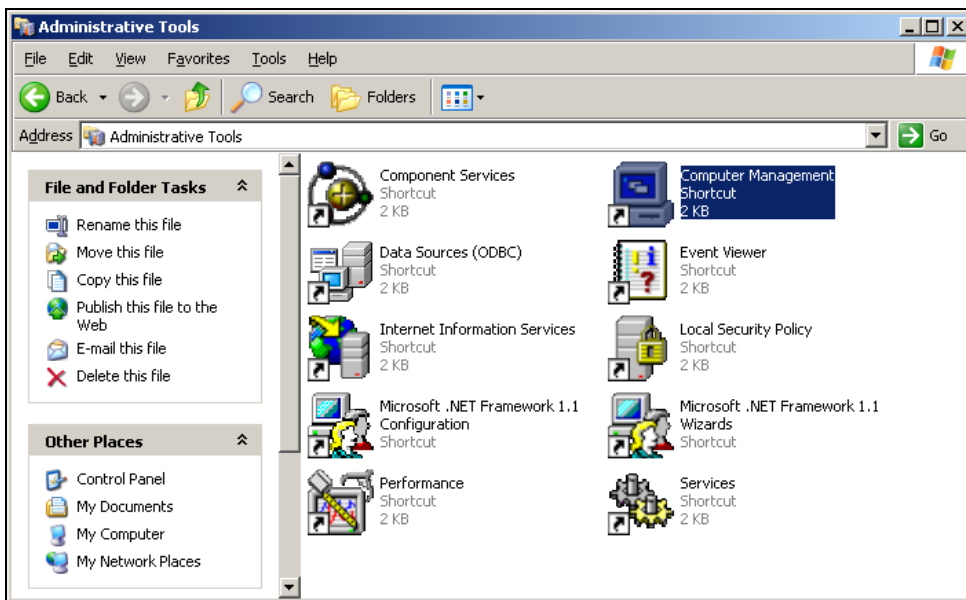
You must set up your server as an application server and not just a file server. Windows Server 2003 must be at SP1. To enable COM+, add a Domain Level Group to the Distributed COM Users group local to your Windows Server 2003 or 2008 machine and add a new role to the Medici COM+ component containing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

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

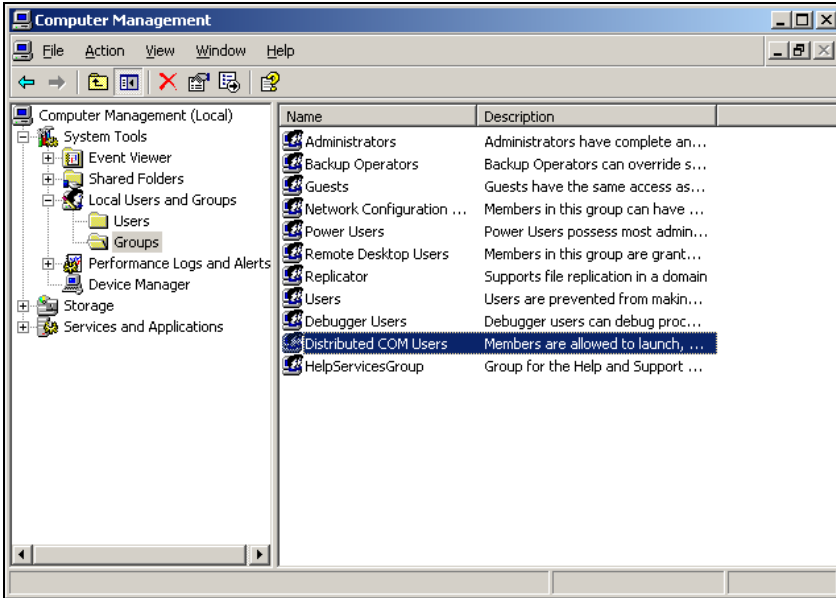
You can find more details on Win 2003 SP1 configurations here:

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

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

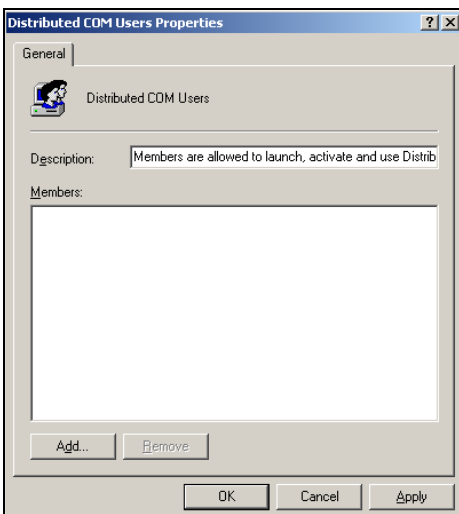


2. To access the Distributed COM Users group, open the System Tools node, the Local Users and Groups node, and click the Groups folder. Double-click the Distributed COM Users group.

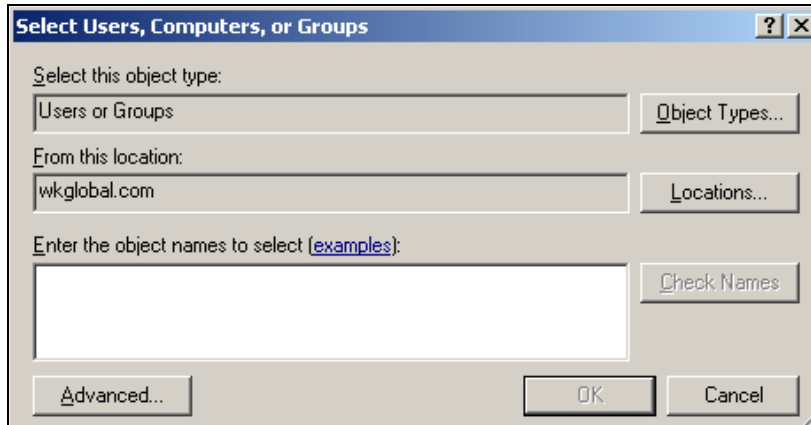


Note: Microsoft added this group to better facilitate how you grant access to users of Distributed COM components.

3. The Distributed COM Users Properties window appears. Click Add.

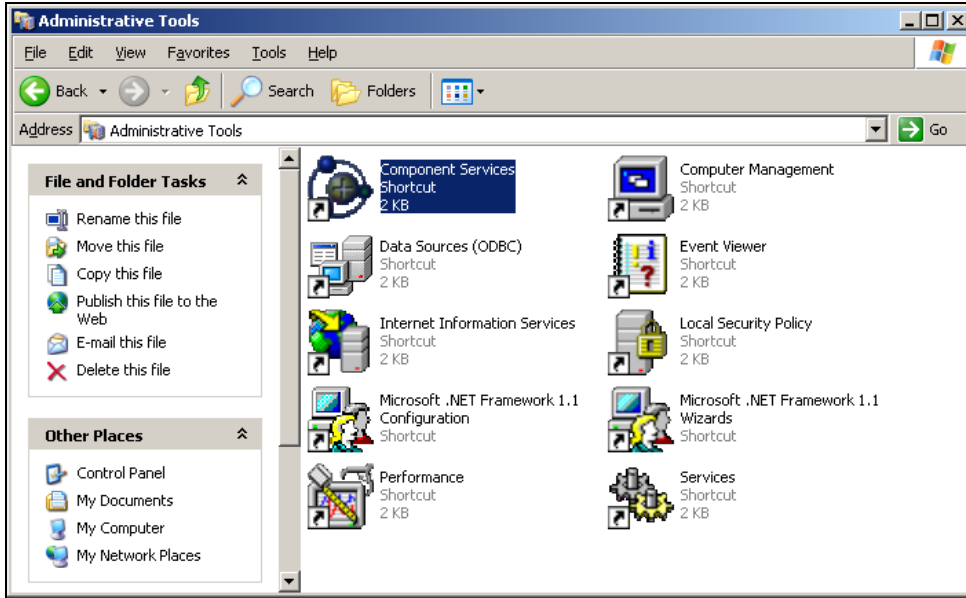


4. The **Select Users, Computers, or Groups** window appears. Verify the object type is **Users or Groups**, or click **Object Types** to change it. Add your **Medici Group** to the **Distributed COM Users** group by entering its name in the object names field and clicking **Check Names**. Click **OK**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

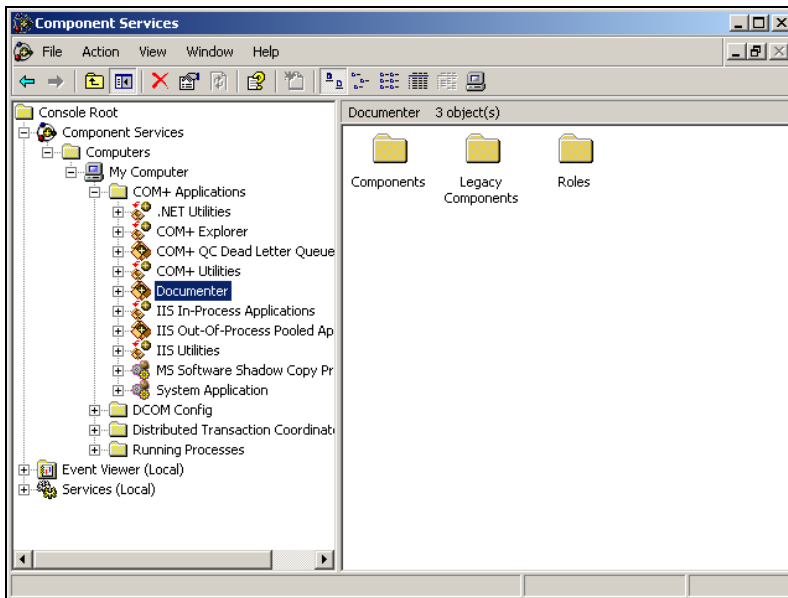


Note: The Medici Group should be the same group you use to maintain access to the shared network location **DMTransaction** path. This allows for easier maintenance if you need to add users to Medici.

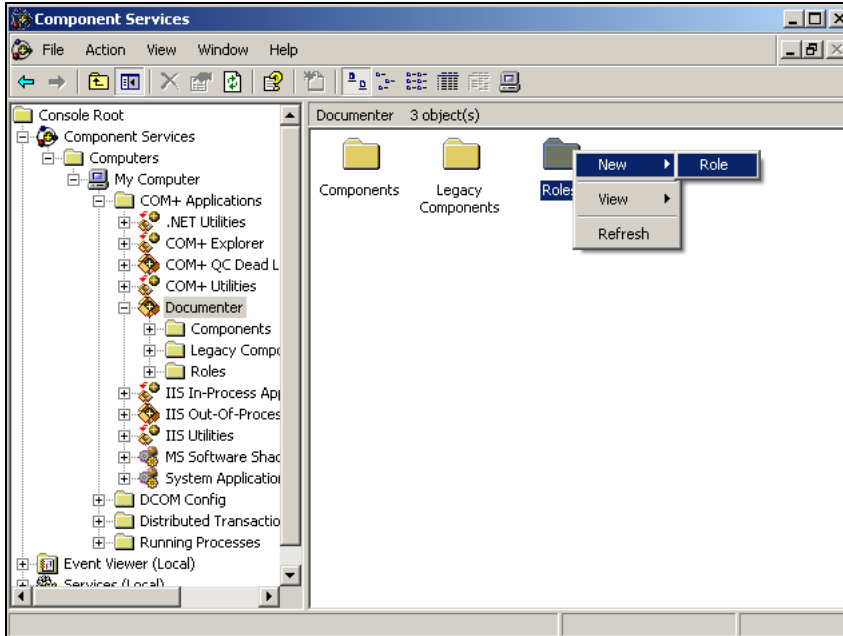
5. To open Component Services, click **Start**, click **Control Panel**, double-click **Administrative Tools** and double-click **Component Services**.



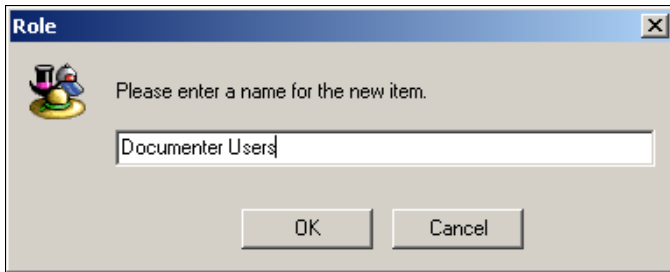
6. The Component Services window appears. To access the Medici COM component, open the **Component Services** node, the **Computers** node, the **My Computer** node, the **COM+ Applications** node, and the **Documenter** node.



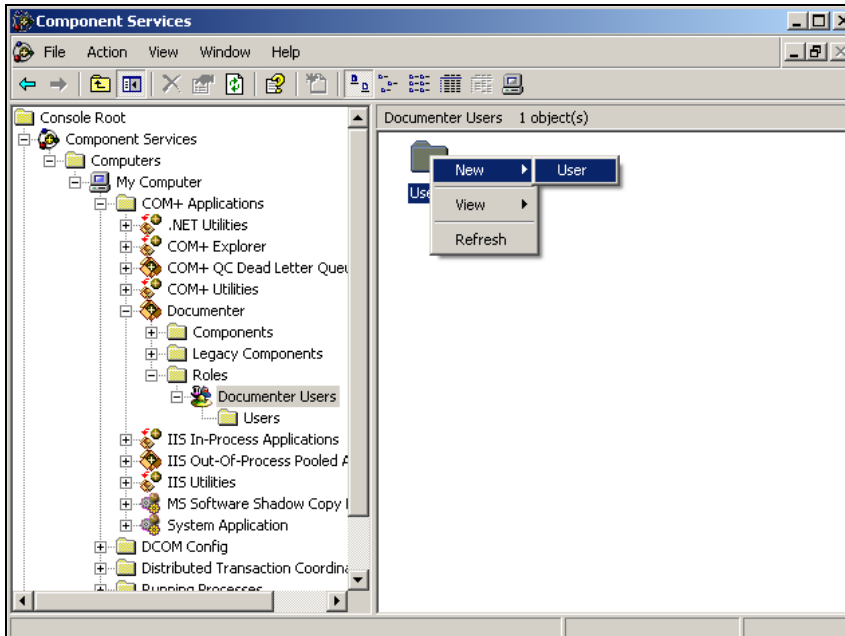
7. Right-click the **Roles** folder under the Medici COM+ Component and select **New** then **Role**.



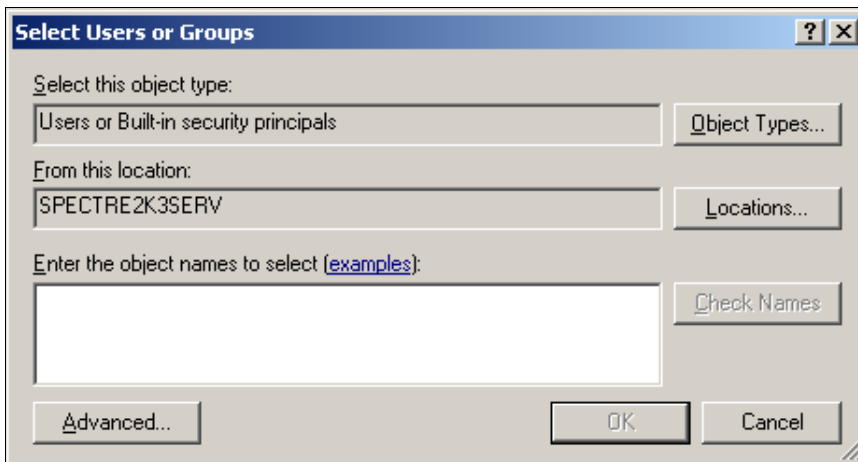
- 8. The Role window appears. Type a name for the new role, such as Documenter Users.



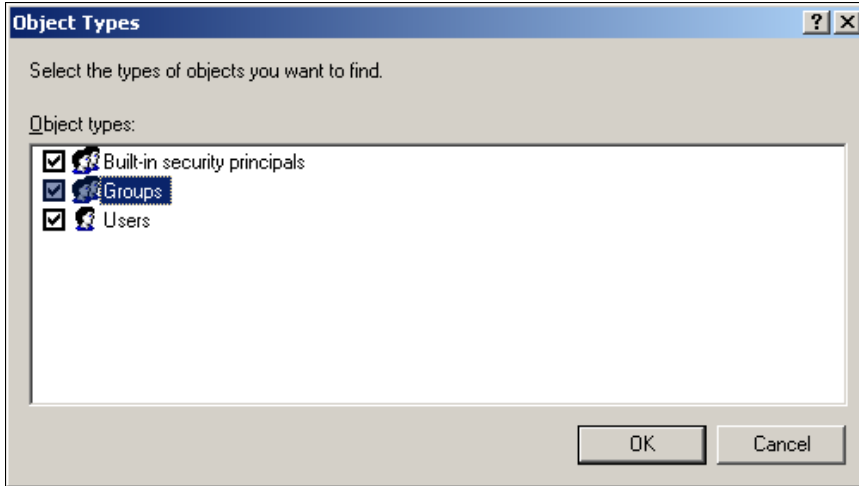
- 9. Expand the Documenter Users node. Right-click Users and select New, then User.



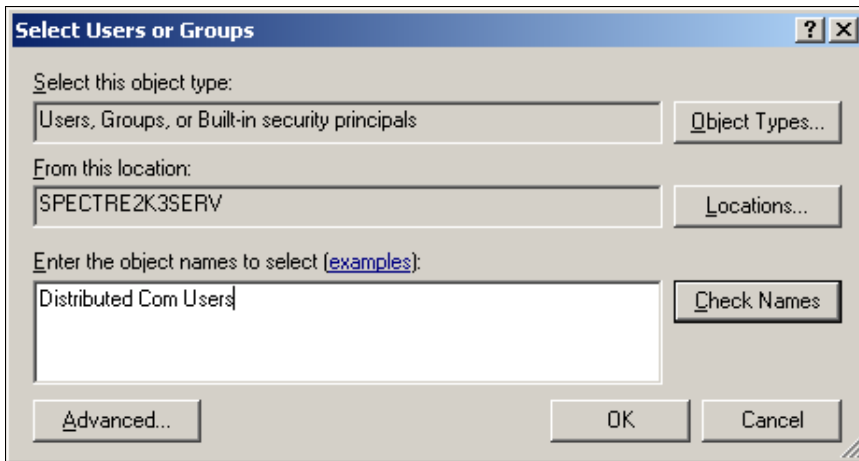
10. The Select Users or Groups window appears. Click Object Types.



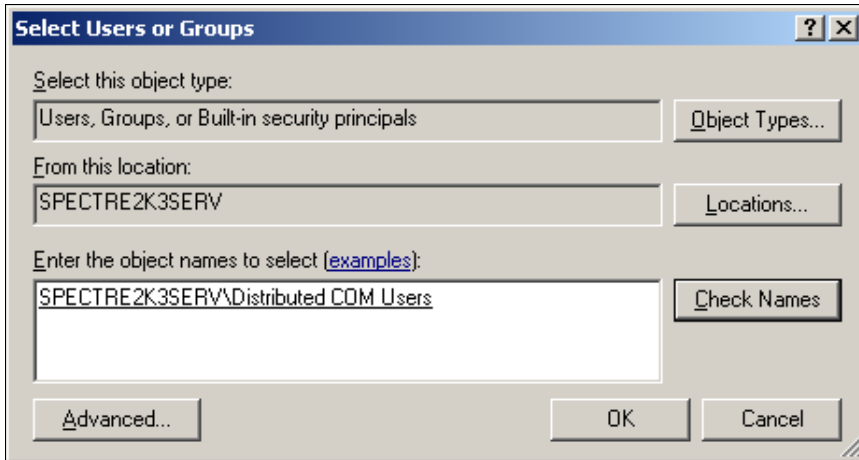
11. The Object Types window appears. Select the Groups check box and click OK.



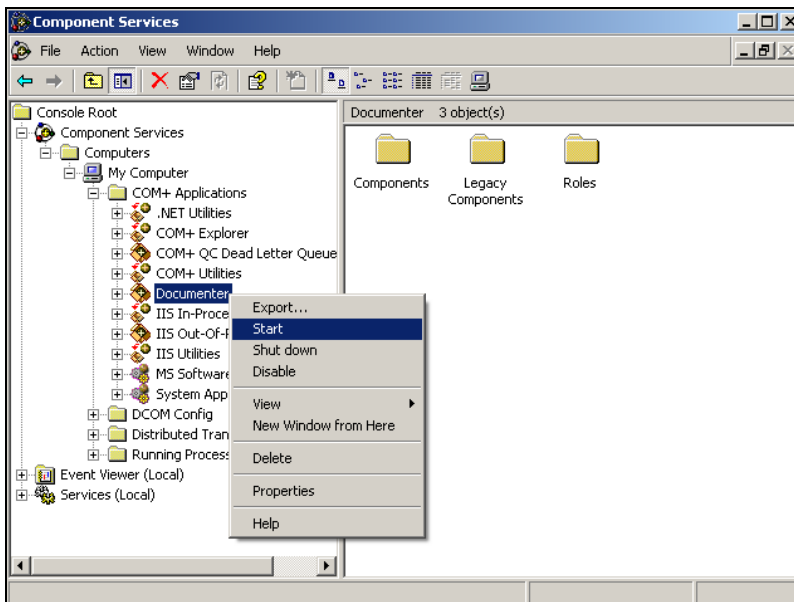
12. Type Distributed Com Users in the Enter the object names to select field and click Check Names.



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



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

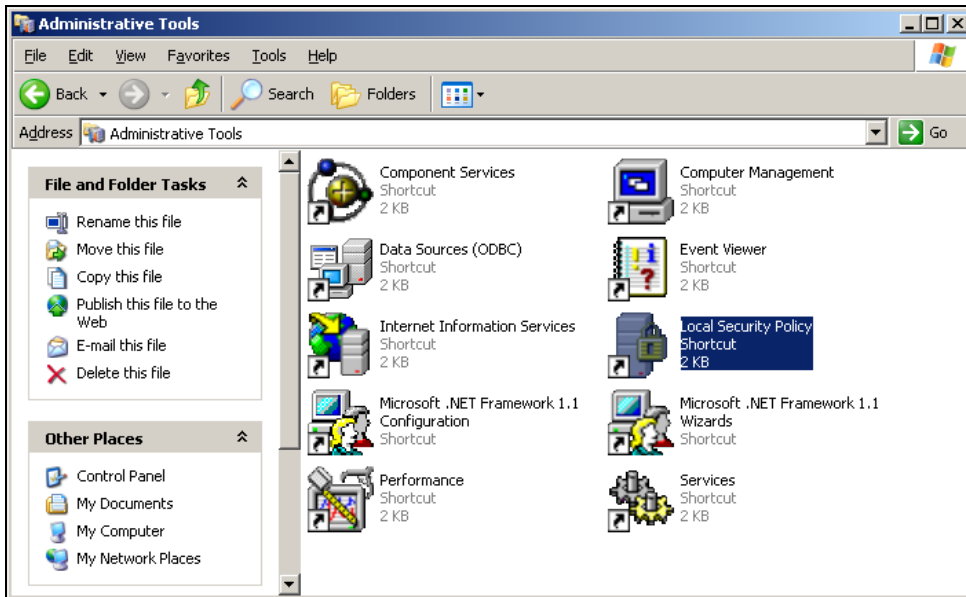


Grant Remote and Local Access

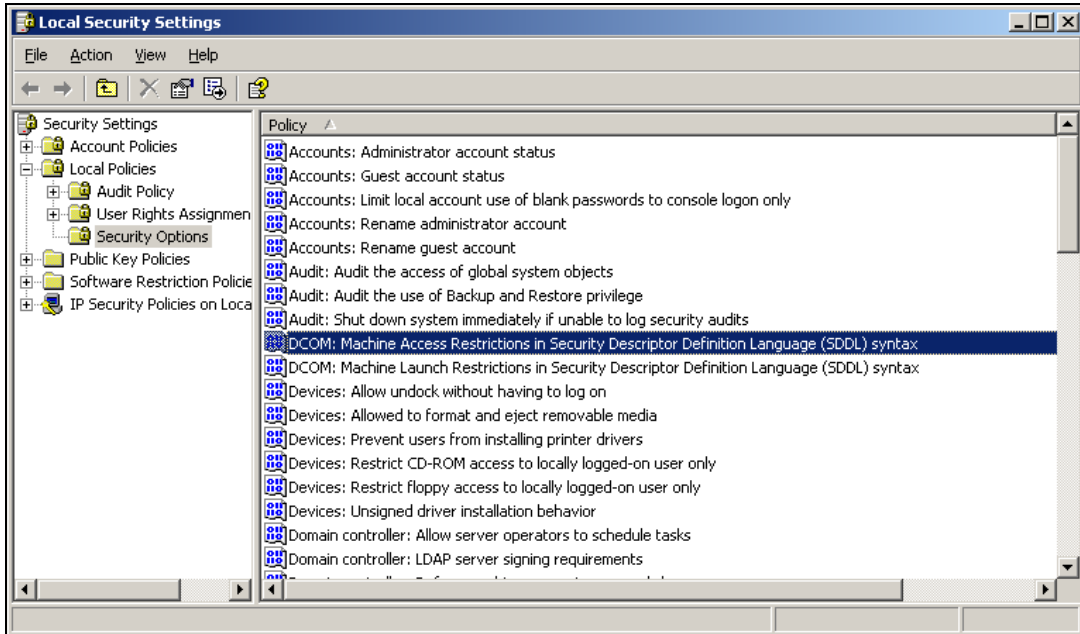
If you are unable to use the Distributed COM Users group, you need to set up a Medici Users group directly into the role of the Medici COM+ component, instead of adding the Medici Users group to the Distributed COM Users group and then adding the Distributed COM Users group to the role of the Medici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

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

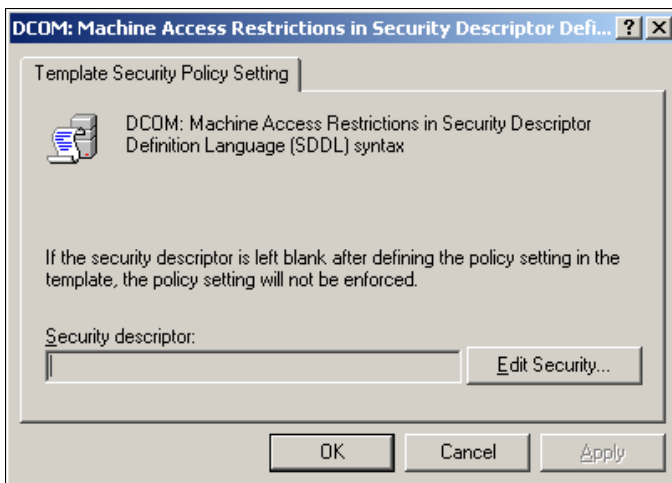
1. To open the Local Security Policy on the server hosting the Medici Application Server, click **Start**, click **Control Panel**, double-click **Administrative Tools**, and double-click **Local Security Policy**.



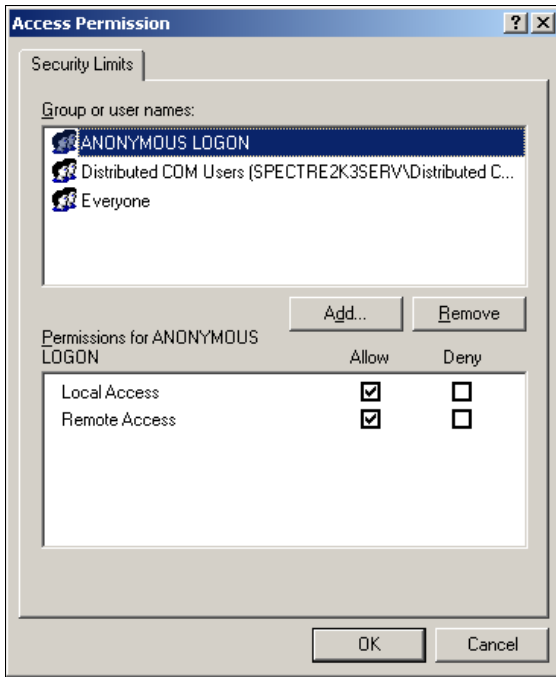
2. The Local Security Settings window appears. Expand Local Policies and select the Security Options folder. Select the DCOM: Machine Access Restrictions in Security Descriptor Definition Language (SDDL) syntax option and press Enter.



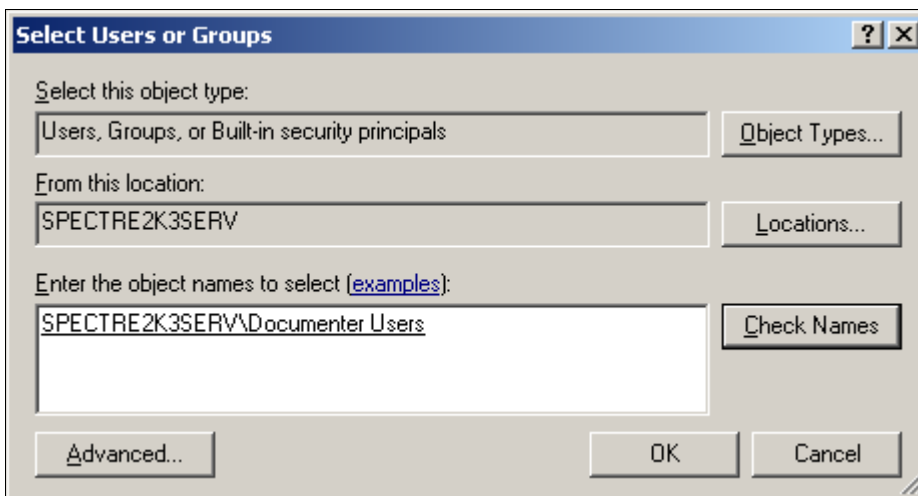
3. The Template Security Policy Setting window appears. Click Edit Security.



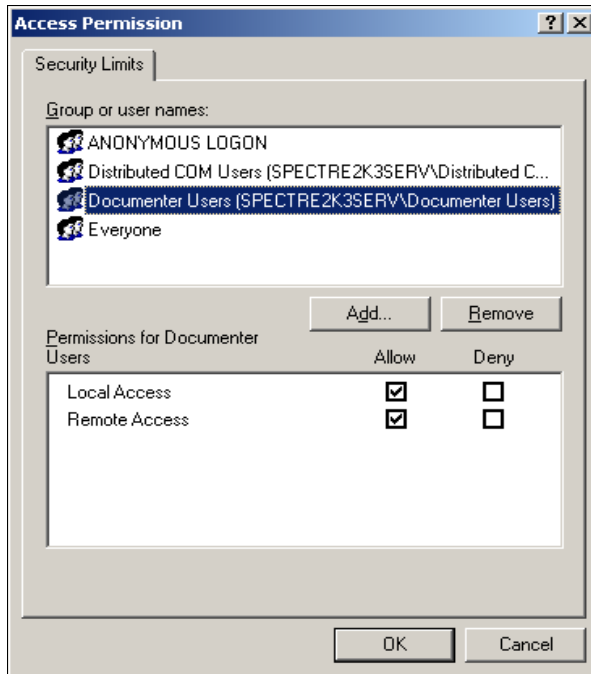
4. The Access Permission window appears. Click Add.



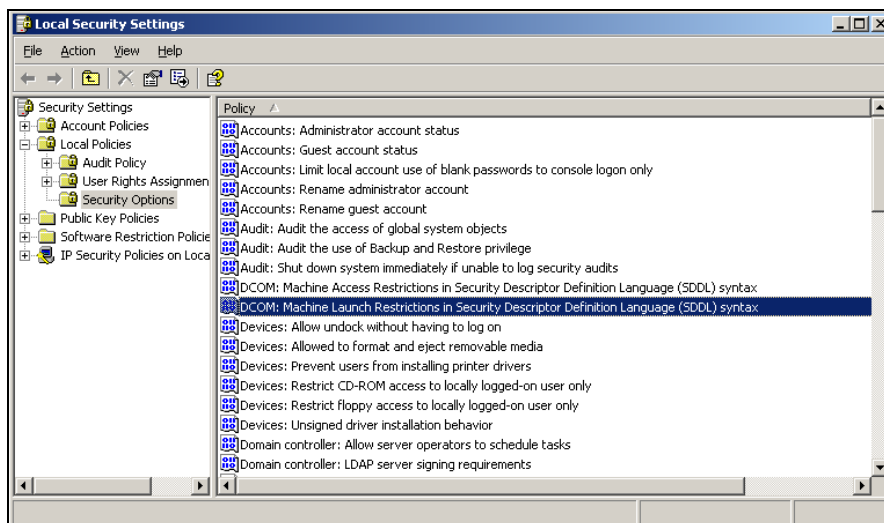
5. The Select Users or Groups window appears. Enter the Medici Users group in the Enter the object names to select field and click OK.



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



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

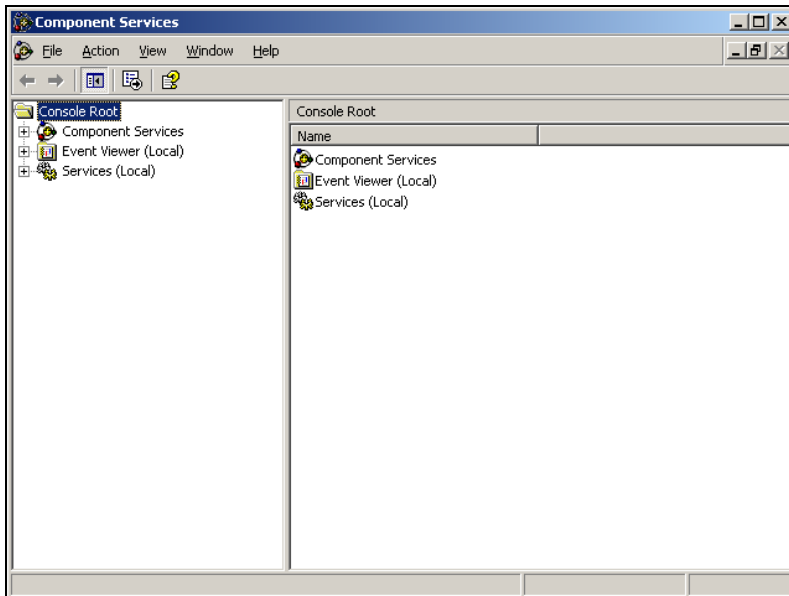


Appendix E: Documenter COM+ Component Removal

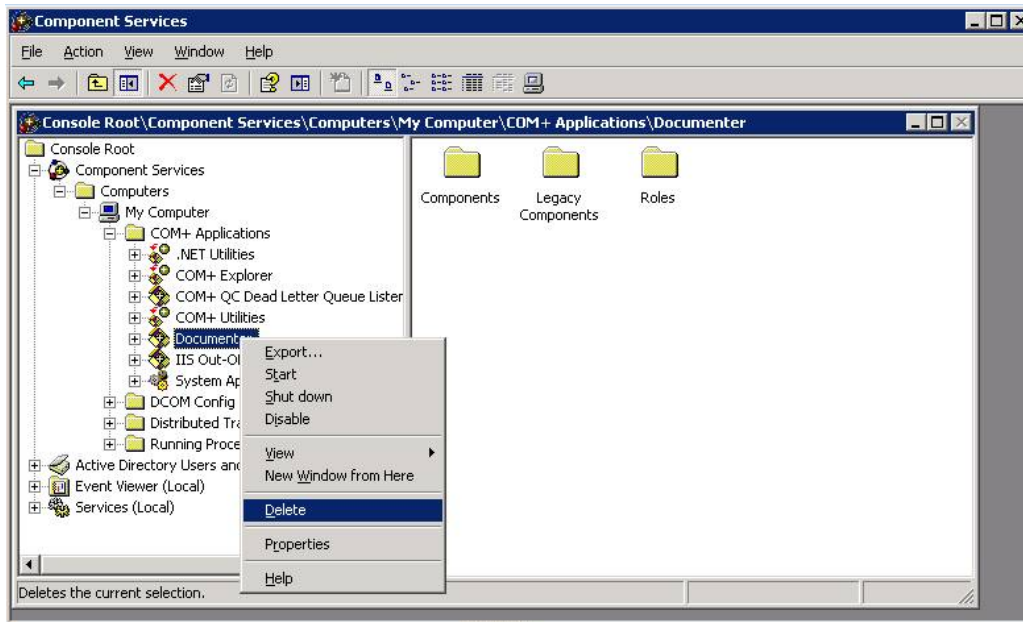
The Documenter (Medici) COM+ application needs to be removed only if you are changing the install configuration of the machine where Medici is being installed. For example, if the machine was a server machine only or a server/database machine without a client and the new configuration will be a server/database/client or server/client or client only, then the COM+ component needs to be removed.

This appendix covers the instructions for how to delete the Documenter COM+ component.

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



2. To locate the Medici COM+ Application, expand **Component Services**, **Computers**, **My Computer**, **COM+ Applications**. Right-click **Documenter**. Select **Delete** from the context-menu.



Note: This only removes the COM+ component, it does not uninstall the Medici Server itself.

Appendix F: Medici System Configurations

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

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

3-Tier Configuration

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

2-Tier Configuration

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

1-Tier Configuration or Stand-Alone Implementation

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

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

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

Changing Configuration during Upgrade

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

