

## New Server Installation Checklist

Type of Install: New features and updated KB.

### Notes Before Starting – Please Read

- Locate your Organization's Rembrandt Customer Number. It will be required during the Installation process.
- The installation instructions list specific implementation options. If you are attempting to install in a manner other than what is listed, contact SupportLine (Technology) to discuss your options or for additional information.
- Multiple domain access is outside the scope of this document as is SQL Server clustering, and the use of SQL Server named instances.
- Review the Rembrandt System Requirements information at <http://support.wolterskluwerfs.com>.
- Rembrandt must be installed on a member server, not onto a Domain Controller or a Microsoft Small Business Server, within an established Microsoft Windows Server 2003 Domain Network Model.
- Server names: Do not name the hosting application server 'Rembrandt' or any name that is exclusively numeric. Do not use hyphens, underscores, spaces or any other non-alphanumeric character in the naming of the server intended for Rembrandt installation; the result will be unstable software.
- Once the software is installed, do not rename the server.
- Verify Windows Server 2003 or Windows Server 2008 has been installed as instructed by Microsoft to ensure a secure, stable system.
- Install current and stable Microsoft service packs to Windows Server 2003 or Windows Server 2008 and Internet Explorer prior to installation. Restart your server after applying service packs.

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**Note:** When applying service packs, check your printer manufacturer, your backup software manufacturer or any other 3rd party software provider prior to applying service packs to your system to ensure overall system stability and performance.

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- Verify Microsoft TCP/IP has been installed on the server. Static, that is, reserved, IP addresses are usually given to servers.
- Name resolution must be provided by your Microsoft network. Verify name resolution is accomplished via WINS, DNS, LMHOSTS files or HOSTS files.
- It is assumed the Rembrandt Lending System has not been installed to this server previously.
- Since Rembrandt was developed as a Client/Server software system, the Rembrandt Client must be installed onto each end users workstation accessing the Rembrandt Lending System on the server.

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**Note:** Terminal Services deployments differ in that the Rembrandt Client is only installed onto the Terminal Server itself and not onto the end users workstation directly. Installation instructions for the Rembrandt Client can be found in the *Client Installation Checklist* available on the documentation page of the Wolters Kluwer Financial Services support web site.

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- Do not use remote access or remote control software to install Rembrandt. Not all remote access software writes correctly to the registry; therefore the supported implementation will require you to be seated directly at the application server console. Do not use a remote console for installation.
- Loan Administration Staff: Carefully review the Rembrandt 2011.4 Release Notes documentation prior to installation.

## Pre-Installation Preparation

### Access and Accounts

- Domain Administrator security level access is required for the person completing the installation of the Rembrandt server software.
- Domain Administrator security level access is required for adding users to the software once it has been installed.
- Domain user accounts should be created for all Loan Officers, Loan Processors and Administrators requiring access to, or name availability in the Rembrandt software. Each domain user account must contain (minimally) a user name, a full name and a password.
- Users can only be added to the software from the server console.

### Service Accounts and Security Groups on the Domain Controller

- Create a Domain User account named DDSService.
- Create a Domain User account named DComUser.
- Create a Domain Global Security Group named RMBTGlobal.
- Add DDSService, DComUser, Administrator and all other user accounts requiring access or name availability in Rembrandt to the RMBTGlobal group.

## Service Accounts and Security Groups on the Member Server

- Create a local group named RembrandtUsers.
- Add the RMBTGlobal group to the local RembrandtUsers group.
- Add the DDSService account and the DComUser account to the member server's local administrators group.
- Important for Windows Server 2003 and Windows Server 2008 Users:** If the server designated for Rembrandt installation has Service Pack 1 or 2 installed, you must also add the RMBTGlobal group to the local Distributed COM Users group.

## Install Microsoft SQL Server and Service Packs

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**Important!** Named instances of SQL Server 2005 are not supported.

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- Make the following selections during the installation of SQL Server 2005:
  - o Typical Setup, default installation options only
  - o Windows Authentication
  - o SQL Server 2005 users must enable TCP/IP support within SQL Server 2005. See <http://www.microsoft.com/sql> or SQL Server 2005 Books Online, <http://www.microsoft.com/technet/prodtechnol/sql/2005/downloads/books.mspix>, for more information on setting this parameter.
- Install the latest service pack for the version of SQL Server purchased. Currently, Microsoft SQL Server 2005 Service Pack 2 should be installed.
- Restart the server before beginning software installation.

## Create the Rembrandt Database

- Create a database named Rembrandt2011\_4 using SQL Server's Enterprise Manager, SQL Server Management Studio.
- Size the database and transaction log according to your business needs, however no less than 100 MB for each.
- The Rembrandt2011\_4.sql database structure script is located within the SQL folder of the Rembrandt CD. Use SQL Server's Query Analyzer or the 'New Query' option within SQL Server 2005 Management Studio to run the Rembrandt script against the Rembrandt2011\_4 database. Executing the script creates the database structure.

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**Important!** If you have Rembrandt installed to a Domain Controller, the script will fail. Rembrandt is not recommended for Domain Controller installation. See [Appendix A](#) for instructions on manually configuring Rembrandt on a Domain Controller.

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# Rembrandt Lending System Server Installation

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**Important!** Every effort has been made to ensure an error-free installation process. If, however, an error message is encountered during installation,

call technical support at 1-800-274-2711 X1124081 before proceeding. Rembrandt has several components that must be installed in sequential order; therefore it is very important you do not continue past an error message until a support technician instructs you to do so.

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- At the root of the Rembrandt CD, execute the Setup.exe program. Read each screen carefully before clicking NEXT.
- Select ALL of the following options to install the Rembrandt Server:
  - o Rembrandt Server
    - Remote Multiple Client Setup Files
    - DDS (Distributed Document Services)

- The default installation location for the Rembrandt Server will be %:\BSIApps\Rembrandt. The default location for the DDS Server installation will be %:\Program Files\Common Files\BSI Shared\Document Services.

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**Note:** The Rembrandt Server and DDS Server installation defaults to the system partition. Generally it is preferable to have the system partition reserved for the operating system exclusively, and the applications installed to a separate partition. It is recommended that you place the DDS Server on the same partition as the Rembrandt Server. If you change the partition that the Rembrandt installs to, please remember to also change the DDS Server installation partition, while being careful to maintain the integrity of the default directory structure and path.

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- The server will require a restart at the end of the Rembrandt file placement and installation process.

## Database Initialization

- After the server has restarted, login and execute the RMBTinit.exe program located within the servers BSIApps\Rembrandt folder. Note that the user does not have to start this .exe manually.
- The Rembrandt Server Initialization process will begin with the Organization Initialization screen. Use care when entering data on the Organization screen & verify data entered before clicking NEXT. Record your settings below:
  - o Location ID \_\_\_\_\_ this item typically refers to host information. If unsure what to enter, enter 01.
  - o Legal Name \_\_\_\_\_
  - o Jurisdiction \_\_\_\_\_
  - o Organization Charter \_\_\_\_\_ (Leave the defaulted first option selected, as it is the most flexible.)

## Security Access and Component Configuration

- Share the BSIApps folder and all subfolders with the RembrandtUsers group, providing the group with 'full control' permission to the share and 'full control' NTFS permissions. This is particularly important if your organization will be using an interface with Rembrandt or if you will allow end users to 'see' the source installation folder for the client setup.

- To add users click START, Programs, BSI, User Management. Users can only be added to the software from the server console.
- Within Rembrandt's User Management, select Options, then Load Users from the drop down list. All usernames contained within the local RembrandtUsers Group/RMBTGlobal group will be added to the Rembrandt Lending System. Only the login ID used to install Rembrandt will have access rights to the Rembrandt Lending System Software by default. Consult the Rembrandt User Management Manual for further information regarding access rights.

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**Note:** If multiple groups named 'RembrandtUsers' exist within your environment, the Load Users option will fail with an error: "Server threw an exception." This error may also occur if the RembrandtUsers group contains security identifiers, SIDs, rather than usernames.

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## DCOM Configuration

DCOM configuration differs depending upon the installed version of your operating system. Separate configuration steps are provided for configuring DCOM in Windows 2003 with service pack 1 and Windows 2003 without service pack 1 installed. Complete only the section applicable to your installed environment.

### Windows 2003 DCOM Configuration, Service Pack 1 or 2 Installed

- Click Start, Administrative Tools, Component Services. The Component Services window will open.
- From the left pane of the window, open the Component Services folder.
- Highlight the Computers folder.
- From the right pane, highlight My Computer, right click and select Properties. The My Computer Properties window will appear.
- Select the COM Security tab.
- Within the Access Permissions category, click on the Edit Default button. The Access Permission window appears.
- Click the Add button. The Select Users or Groups window appears.
- Within the From This Location category, verify the local computer name is listed.
- Within the Enter the Object Names to Select category, type Distributed COM Users.
- Click OK. You should return to the Access Permissions window.
- Highlight Distributed COM Users and verify the Permissions for the group Distributed COM Users has both access permissions of Allow Access and Remote Access checked.
- Click OK. You should return to the Default COM Security tab of My Computer Properties.
- Within the Launch Permissions category of the Default COM Security tab, click on Edit Default. The Launch Permissions window appears.

- Click the Add button. The Select Users or Groups window appears.
- Within the From This Location category, verify that the local computer name is listed.
- Within the Enter the Object Name to Select category, type Distributed COM Users.
- Click OK. You should have returned to the Launch Permissions window.
- Highlight Distributed COM Users and verify the Permission for the group Distributed COM Users has Launch Permission of Allow for all 4 options:
  - Allow Local Launch
  - Allow Remote Launch
  - Allow Local Activation
  - Allow Remote Activation.
- Click OK. You should now be back on the My Computer Properties window Default COM Security tab.
- Click Apply then OK to return to the Component Services main window.
- From the left pane, open the My Computer category.
- Open the DCOM Config folder.
- Highlight the BSI Docservices item.
- Right Click and select Properties.
- On the BSI Docservices Properties window, select the Identity tab.
- Select This User.
- Click Browse to locate the DDSService account from your domain users list.
- You will need to enter the password information and confirm the password.
- Click Apply and OK.
- Highlight the BSLockMgrApp.LockManagerClass item, right click and select Properties.
- Select the Identity tab.
- Select This User.
- Click Browse to locate the DCOMUser account from your domain users list.
- You will need to enter the password information and confirm the password.
- Click Apply and OK.
- Restart the server to activate the settings changes.

### **Windows 2008 DCOM Configuration**

- Click Start, Administrative Tools, Component Services. The Component Services window will open.

- From the left pane of the window, open the Component Services folder.
- Highlight the Computers folder.
- From the right pane, highlight My Computer, right click and select Properties. The My Computer Properties window will appear.
- Select the COM Security tab.
- Within the Access Permissions category, click on the Edit Default button. The Access Permission window appears.
- Click the Add button. The Select Users or Groups window appears.
- Within the From This Location category, verify the local computer name is listed.
- Within the Enter the Object Names to Select category, type Distributed COM Users.
- Click OK. You should return to the Access Permissions window.
- Highlight Distributed COM Users and verify the Permissions for the group Distributed COM Users has both access permissions of Allow Access and Remote Access checked.
- Click OK. You should return to the Default COM Security tab of My Computer Properties.
- Within the Launch Permissions category of the Default COM Security tab, click on Edit Default. The Launch Permissions window appears.
- Click the Add button. The Select Users or Groups window appears.
- Within the From This Location category, verify that the local computer name is listed.
- Within the Enter the Object Name to Select category, type Distributed COM Users.
- Click OK. You should have returned to the Launch Permissions window.
- Highlight Distributed COM Users and verify the Permission for the group Distributed COM Users has Launch Permission of Allow for all 4 options:
  - Allow Local Launch
  - Allow Remote Launch
  - Allow Local Activation
  - Allow Remote Activation.
- Click OK. You should now be back on the My Computer Properties window Default COM Security tab.
- Click Apply then OK to return to the Component Services main window.
- From the left pane, open the My Computer category.
- Open the DCOM Config folder.
- Highlight the BSI Docservices item.
- Right Click and select Properties.

- On the BSI Docservices Properties window, select the Identity tab.
- Select This User.
- Click Browse to locate the DDSService account from your domain users list.
- You will need to enter the password information and confirm the password.
- Click Apply and OK.
- Highlight the BSLockMgrApp.LockManagerClass item, right click and select Properties.
- Select the Identity tab.
- Select This User.
- Click Browse to locate the DCOMUser account from your domain users list.
- You will need to enter the password information and confirm the password.
- Click Apply and OK.
- Restart the server to activate the settings changes.

## Final Steps

- Configure Rembrandt backup routines according to the Rembrandt Server Maintenance document, available on the Wolters Kluwer Financial Services web site.
- Check <http://support.wolterskluwerfs.com> on a regular basis for updates or current information regarding Rembrandt.
- Install the Rembrandt 2011.4 Client on all workstations accessing the Rembrandt 2011.4 server. Instructions for installing the Rembrandt New Client can be found in the *Client Installation Checklist* document on the [Rembrandt Installation web page](#).

## Appendix A

### Configuring the Database on a Primary or Backup Domain Controller

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**Important!** This section is to be completed ONLY by those customers who have Rembrandt installed on a Primary Domain Controller/Backup Domain Controller. If your Rembrandt server is a member server and is not a Domain Controller or Backup Domain Controller, ignore this section.

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- After running the Rembrandt2011\_4.sql database script, errors will be returned by the SQL Servers Query Analyzer.

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**Note:** Rembrandt was not intended to be installed to a domain controller and has not been tested for domain controller installations. Rembrandt is intended to be installed to a member Server within a Windows 2003 Domain.

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If you are installing the Rembrandt Lending System on a domain controller, several parts of the database script will fail and error messages will appear within the query results. All failed items must be corrected manually after the script has run.

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- To correct the errors, manually create the RembrandtUser database user account using SQL Server's Enterprise Manager, under the Rembrandt2011\_4 database and associate it to the RembrandtUsers group created in Windows 2003.
- Assign the RembrandtUser account 'dbdatareader' and 'dbdatawriter' permissions on the Rembrandt2011\_4 database.
- Use SQL Server's query analyzer utility to enter and run the following command to set permissions on the BSI proprietary stored procedures:

```
USE REMBRANDT2011_4
```

```
EXEC BSIDB_SETUP_SETSPSECURITY 'RembrandtUser'
```

```
Go
```

- Continue to install the product from the section titled [Rembrandt Lending System Server Installation](#).

# How to Contact SupportLine

## Support Web Site

Visit our Software Support web site for documentation, downloads, frequently asked questions, training, and support information, or to submit issues through e-mail at the following location:

<http://support.wolterskluwerfs.com>

We believe you'll find this site to be a valuable source of support information. We have added links to many industry sites that we think will benefit you.

## Contact Us by Phone

You can call our SupportLine technicians at 1-800-274-2711. Our support staff is available Monday through Friday, 7 A.M. to 7 P.M. Central Time. Voice mail operates continually, allowing you to leave us a message after hours and on weekends. Support staff checks voice mail on the next available business day.

To help us handle your question as quickly as possible, have these items handy before you call:

- product name and version number
- product customer number
- operating system and version number

## Program Use Questions

Call 1-800-274-2711, ext. 1124012

## Technology / Installation / Hardware or Systems Questions

Call 1-800-274-2711, ext. 1124081

## Contact Us by Email

Use this email to contact us with questions: [rmbrtsup@wkglobal.com](mailto:rmbrtsup@wkglobal.com).

## Contact Us by Fax

Fax us, Attention: SupportLine, at 320-240-4252.

## Contact Us by Mail

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

SupportLine  
Wolters Kluwer Financial Services  
P.O. Box 1457  
St. Cloud, MN 56301

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