

# Installation Instructions

Version 9.4

November 2010

## COPYRIGHT INFORMATION

© 2010 Wolters Kluwer Financial Services.

All rights reserved. Published in 2010.

No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording, or any information storage or retrieval system, without the specific written permission from Wolters Kluwer Financial Services, Inc.

This publication, the software described in this publication, and any updates or release notes to them, are furnished under a Non-Disclosure Agreement, Evaluation Agreement, License Agreement and/or other similar agreement(s) with Wolters Kluwer Financial Services, Inc. and may be used or copied only in accordance with the terms of such agreement(s).

Requests for permission to reproduce content should be directed to Wolters Kluwer Financial Services, Corporate Legal Department, by telephone at 1-800-397-2341.

## CONFIDENTIAL INFORMATION

The contents of this publication (including its Appendices, Exhibits, and other attachments), as updated or revised, are highly confidential and proprietary to Wolters Kluwer Financial Services. This publication is distributed pursuant to a Non-Disclosure Agreement, Evaluation Agreement, License Agreement and/or other similar agreement(s) with Wolters Kluwer Financial Services, Inc. Use and distribution of this publication is subject to the responsibilities and obligations of such agreement(s), which require confidential treatment of this publication and its contents.

## LEGAL COUNSEL

This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is provided with the understanding that Wolters Kluwer Financial Services is not engaged in rendering legal, accounting, or other professional services. If legal or accounting advice or other professional assistance is required, the services of a competent professional person should be sought.

Development of this publication and the software that it describes (including forms, disclosures, reports, and other documents generated by the software), was based on Wolters Kluwer Financial Services' understanding of various laws, regulations and commentaries. Wolters Kluwer Financial Services cannot and does not guarantee that its understanding is correct, except as may be stated in the agreement(s) under which this publication and the software are provided.

Law requires the following notice:

THE PRODUCTS AND SERVICES OF WOLTERS  
KLUWER FINANCIAL SERVICES, INC. ARE NOT A  
SUBSTITUTE FOR THE ADVICE OF AN  
ATTORNEY.

We encourage you to seek the advice of your own attorney concerning the use and legality of the software described in this publication, including its functions, the forms, disclosures, reports, and any other documents

generated by the software, and this publication. If your interpretations or those of your counsel are contrary to Wolters Kluwer Financial Services' interpretation, you should of course, follow your/your attorney's interpretations in using the software, products generated by it, and this publication.

## WARRANTY DISCLAIMER

EXCEPT ONLY FOR THE WARRANTIES (IF ANY) EXPRESSLY SET FORTH IN THE AGREEMENT(S) UNDER WHICH THIS PUBLICATION IS PROVIDED, THIS PUBLICATION IS PROVIDED AS IS, AND WOLTERS KLUWER FINANCIAL SERVICES MAKES NO WARRANTY, EXPRESS, IMPLIED, BY DESCRIPTION, BY SAMPLE OR OTHERWISE, AND IN PARTICULAR AND WITHOUT LIMITATION, MAKES NO IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR PURPOSE. No modifications to this Warranty Disclaimer are authorized unless in writing and signed by the President or a Vice President of Wolters Kluwer Financial Services.

## CONTACT US WITH QUESTIONS OR SUGGESTIONS

Wolters Kluwer Financial Services values your comments and feedback on this publication. We encourage you to contact us if you have any questions about the information in this publication, corrections, or suggested improvements. Please contact Wolters Kluwer Financial Services:

- By telephone: 800-274-2711
- By fax: 800-861-3181
- By email: [tsoftsup@wolterskluwer.com](mailto:tsoftsup@wolterskluwer.com)
- Through our website at:  
<http://support.wolterskluwerfs.com>

## PATENTS, TRADEMARKS AND CREDITS

U.S. Patent is pending on the software described in this publication.

TSoft SBA FormMaster+ is the registered trademark of Wolters Kluwer Financial Services.

All other trademarks are the property of their respective owners.

# Table of Contents

<b>Installation Instructions</b> .....	<b>1</b>
System Requirements .....	1
Hardware and Software.....	1
Printer Requirements .....	1
Microsoft Document Imaging.....	1
Installation Types .....	2
<b>Installing the Standalone or Server Version of TSoft SBA FormMaster+</b> .....	<b>3</b>
<b>Installing the Client Version of TSoft SBA FormMaster+</b> .....	<b>12</b>
<b>Configurations and Permissions</b> .....	<b>18</b>
Editing the Tcalc.ini File .....	18
Setting Permissions to the TCalc Directory.....	19
<b>Upgrades</b> .....	<b>20</b>
<b>Uninstall Instructions</b> .....	<b>23</b>
<b>How to Contact Wolters Kluwer Financial Services</b> .....	<b>26</b>
Support Web Site.....	26
Call .....	26
Fax .....	26
Write .....	26



# Installation Instructions

## System Requirements

### Hardware and Software

TSoft SBA FormMaster+ requires the following:

- Windows XP Professional and Windows Server 2003
- A Pentium microprocessor (500 MHz or higher)
- A CD-ROM drive
- 100 MB of hard disk space (required), 500 MB (recommended)
- 128 MB's of RAM (required), 256 MB's of RAM (recommended)
- Internet Explorer 6.1 or later
- Microsoft Office (Version 2003 or earlier)

**Note:** Wolters Kluwer Financial Services, Inc. recommends using the latest stable service pack for each operating system mentioned above.

### Printer Requirements

- Printers: Laser Printers using parallel ports or network interfaces.
- Laser printers should at least emulate the HP LaserJet Series 4 and will require 4 megabytes of printer memory.
- DeskJet and bubble jet printers are not supported.

### Microsoft Document Imaging

If Microsoft Office XP (or higher) and FM+ are installed on the same computer, you may be able to use Microsoft Document Imaging to create image files of FM+ Documents. These image files are created in either .TIFF or .MDI format and can be electronically delivered to a third party for printing.

If you choose to use this method of delivering documents please understand that the support of Microsoft Document Imaging and its use is exclusively handled by the manufacturer of the software, Microsoft®. Also, you (the financial institution) are responsible for ensuring the integrity and security of these documents during any and all electronic transit.

For more information on using Microsoft Document Imaging please refer to [Microsoft's website](#).

## Installation Types

There are three types of TSoft SBA FormMaster installations:

- **Install Stand Alone Version** - This will install the software to your local hard drive.
- **Install Server Version** - This will install the software to your network server.
- **Install Client** - This will install support files that are required to run TSoft SBA FormMaster+ from a network server. A client installation must be performed on each workstation that will be running the software from a network.
- **Updates** - You may also need to install periodic updates based on changes to the documents or to the software. Refer to the [Upgrades](#) section to perform these installations.

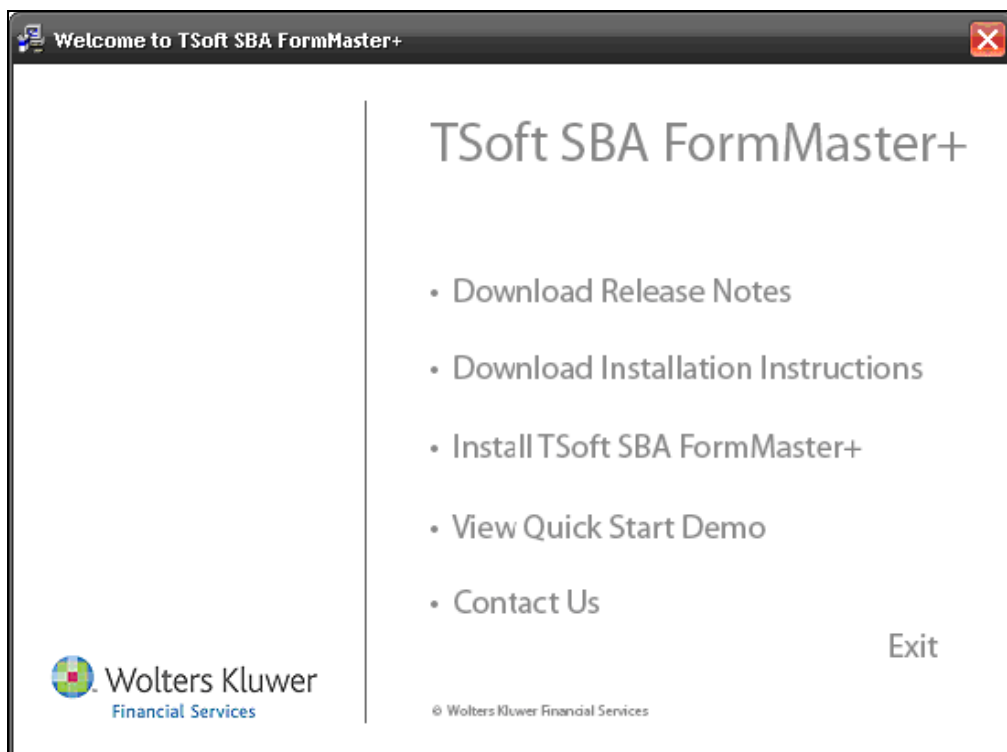
**Note:** If you have any questions when installing TSoft SBA FormMaster+, call the Technical SupportLine at (800) 274-2711 ext. 126511.

# Installing the Standalone or Server Version of TSoft SBA FormMaster+

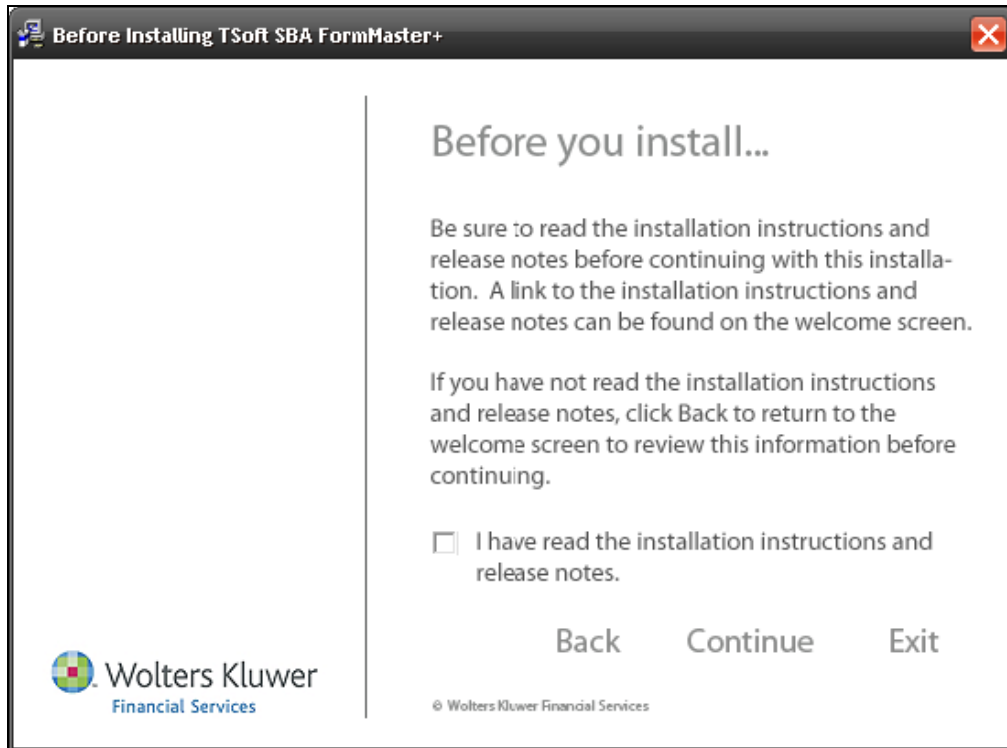
1. Insert the CD-ROM into your CD-ROM drive.
2. The autorun program should start the installation. If the installation does not begin, select **Run** from the **Start** menu. Enter: X:\setup (where X is the CD-ROM drive letter). As an alternative, you can click the **Browse** button to browse to the contents on the installation CD, select the **setup.exe** file and click **OK**.

**Note:** If you do not have a CD-ROM drive, and your computer is part of a network, have your network administrator install the software from a CD-ROM drive located elsewhere on your network.

3. The Welcome screen provides links to obtain documentation, view a quick start demo, contact support, and begin the installation. Once you have read the TSoft SBA FormMaster+ documentation, select **Install TSoft SBA FormMaster+**.



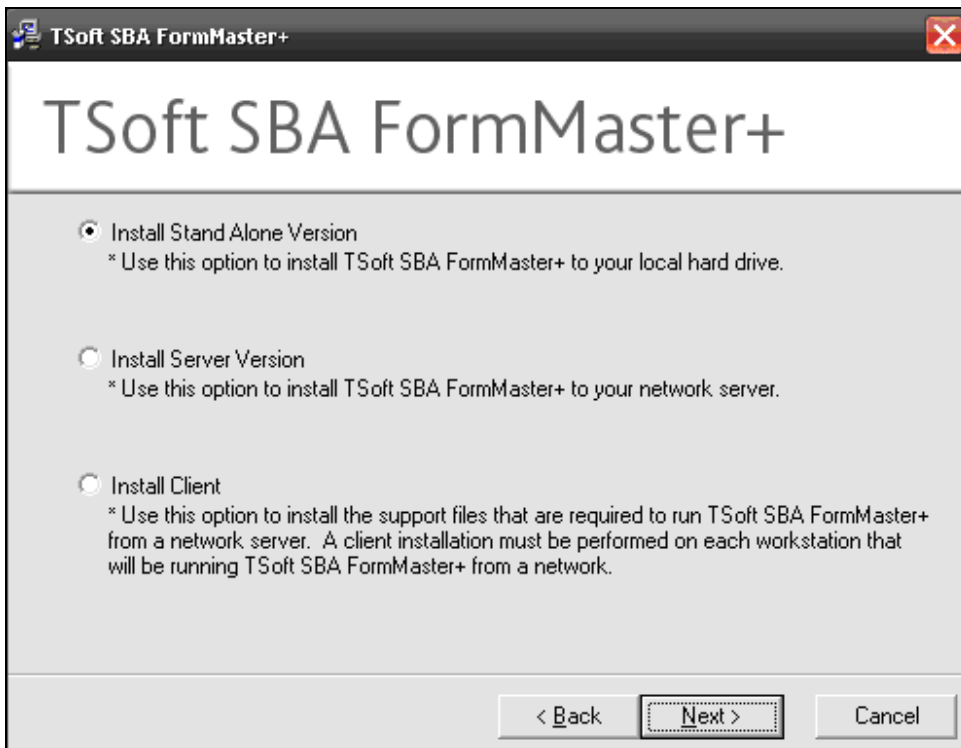
4. The **Before you install...** screen ensures you have received and read the TSoft SBA FormMaster+ documentation. Select the box to verify this and then click **Continue**.



5. Click **Next** to continue the installation.



6. Select the type of installation you would like to perform and click Next.



7. Select the destination folder for the installation and click **Next**. The default is C:\TCALC. If this is not where you want the system loaded, click **Browse** and enter the correct path.



**Note:** You should install either to the default directory or to the directory where your previous version is located. If you are installing TSoft SBA FormMaster+ for the first time, the system will default C:\TCALC as the destination folder. If you are installing over a previous version of the software, the directory of the prior version will default as the destination folder.

8. You may enter **Customer Number** in this screen. If you do not enter your Customer number during the installation, you can enter it once the software is installed. Click **Next** to continue the installation.

**TSoft SBA FormMaster+**

**Customer Information:**

Enter your Customer Number issued by Wolters Kluwer Financial Services.

If you do not know your Customer Number, you can call SupportLine at: 1-800-274-2711 ext. 6511

Customer Number:

< Back   Next >   Cancel

**Note:** To enter or edit your Customer Number information after installing the software, from the **File** menu, select **Program Setup** and enter the information under the **Customer Number** tab.

9. You may enter Lender Information in this screen. If you do not enter the Lender Information during the installation, you will need to enter it after the installation. Click **Next** to continue.



The screenshot shows a window titled "TSoft SBA FormMaster+" with a close button in the top right corner. The main title "TSoft SBA FormMaster+" is displayed in a large font. Below the title, there are seven input fields for Lender Information, each with a label to its left: "Company:", "Address:", "City:", "State:", "Zip:", "Phone:", and "Fax:". At the bottom of the window, there are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "Cancel".

**Note:** If you have a previous version of TSoft SBA FormMaster+ installed, existing Lender Information will display here. To enter or edit Lender Information after installing the software, from the **File** menu, select **Program Setup** and enter the information under the **Lender Information** tab.

10. Enter further Lender details in this screen and click **Next**.



The screenshot shows a window titled "TSoft SBA FormMaster+" with a close button in the top right corner. The main heading is "TSoft SBA FormMaster+". Below the heading are seven input fields for lender information:

- Lending Officer:
- Lending Officer Title:
- Certifying Lender Official:
- Certifying Lender Official Title:
- R. L. Polk #:
- 750 Date:

At the bottom of the window are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel".

11. Click **Next** to begin the installation.



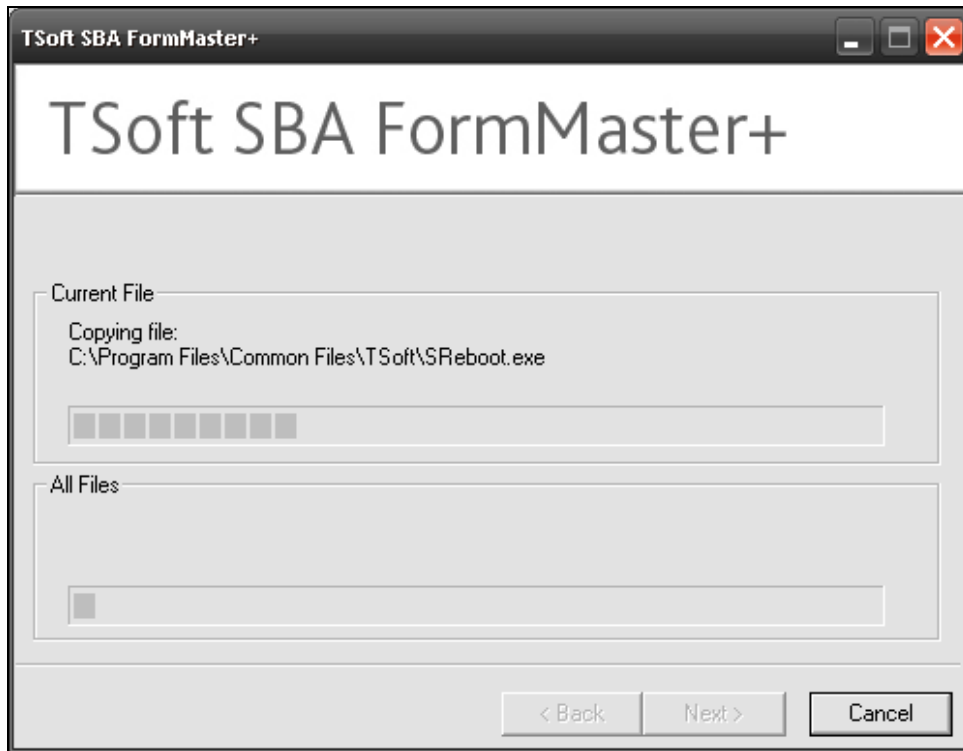
The screenshot shows the same window titled "TSoft SBA FormMaster+" with a close button. The main heading is "TSoft SBA FormMaster+". Below the heading is a message:

You are now ready to install TSoft SBA FormMaster+.

Press the Next button to begin the installation or the Back button to reenter the installation information.

At the bottom of the window are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel".

12. The progress bar shows you the status of the installation.



13. When the Stand Alone installation finishes, click OK to restart your computer.



14. When the Server installation finishes, click **Finish**.



15. To begin using TSoft SBA FormMaster+, double click the TSoft SBA FM+ icon on your desktop. You can also select **Start, Programs, TSoft,** and then **TSoft SBA FormMaster+.**

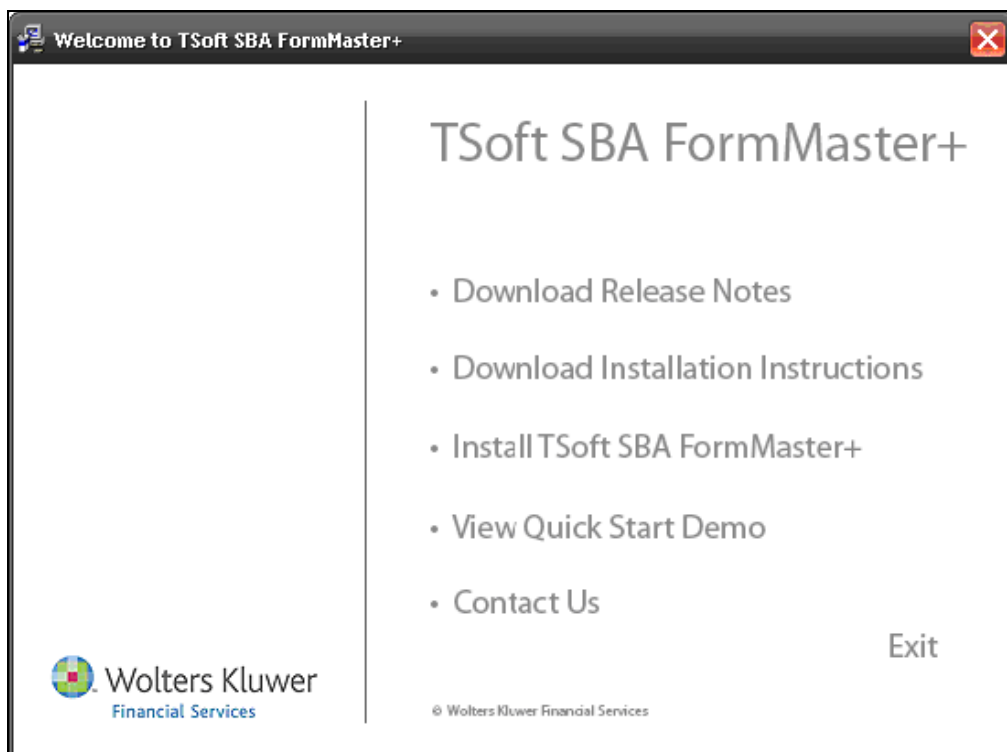


# Installing the Client Version of TSoft SBA FormMaster+

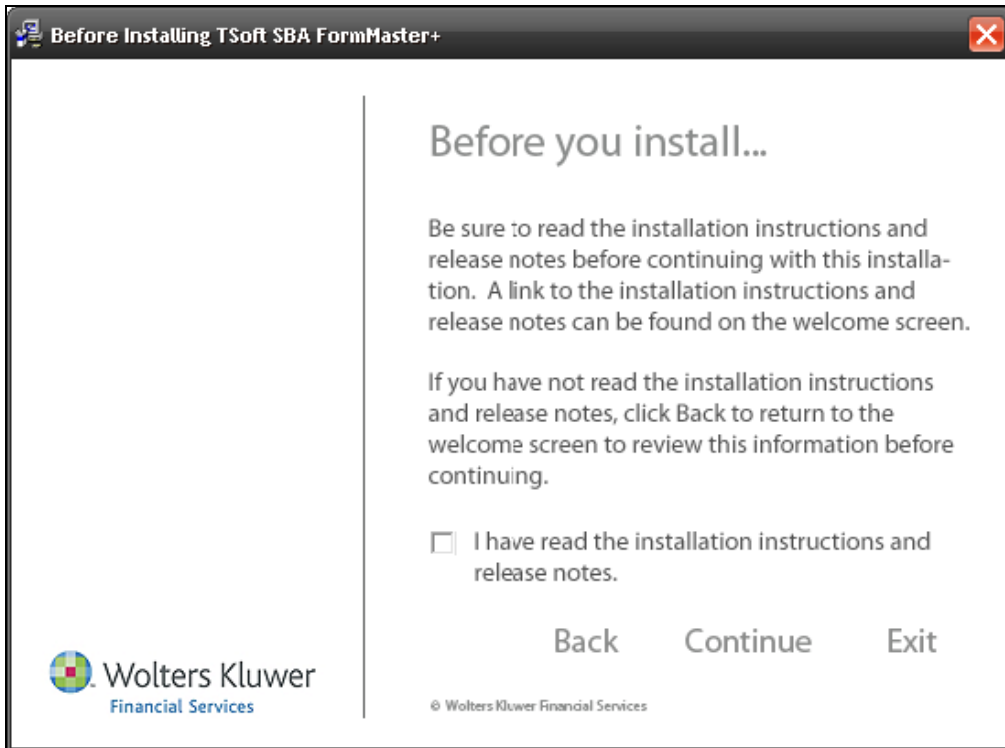
1. Insert the CD-ROM into your CD-ROM drive.
2. The autorun program should start the installation. If the installation does not begin, select **Run** from the **Start** menu. Enter: X:\setup (where X is the CD-ROM drive letter). As an alternative, you can click the **Browse** button to browse to the contents on the installation CD, select the **setup.exe** file and click **OK**.

**Note:** If you do not have a CD-ROM drive, and your computer is part of a network, have your network administrator install the software from a CD-ROM drive located elsewhere on your network.

3. The Welcome screen provides links to obtain documentation, view a quick start demo, contact support, and begin the installation. Once you have read the TSoft SBA FormMaster+ documentation, select **Install TSoft SBA FormMaster+**.



4. The **Before you install...** screen ensures you have received and read the TSoft SBA FormMaster+ documentation. Select the box to verify this and then click **Continue**.



5. Click **Next** to continue the installation.



6. Select the type of installation you would like to perform and click Next.



7. Select the Server Install Location and click **Next**. The default is C:\TCALC. If this is not where you want the system loaded, click **Browse** and enter the correct path.

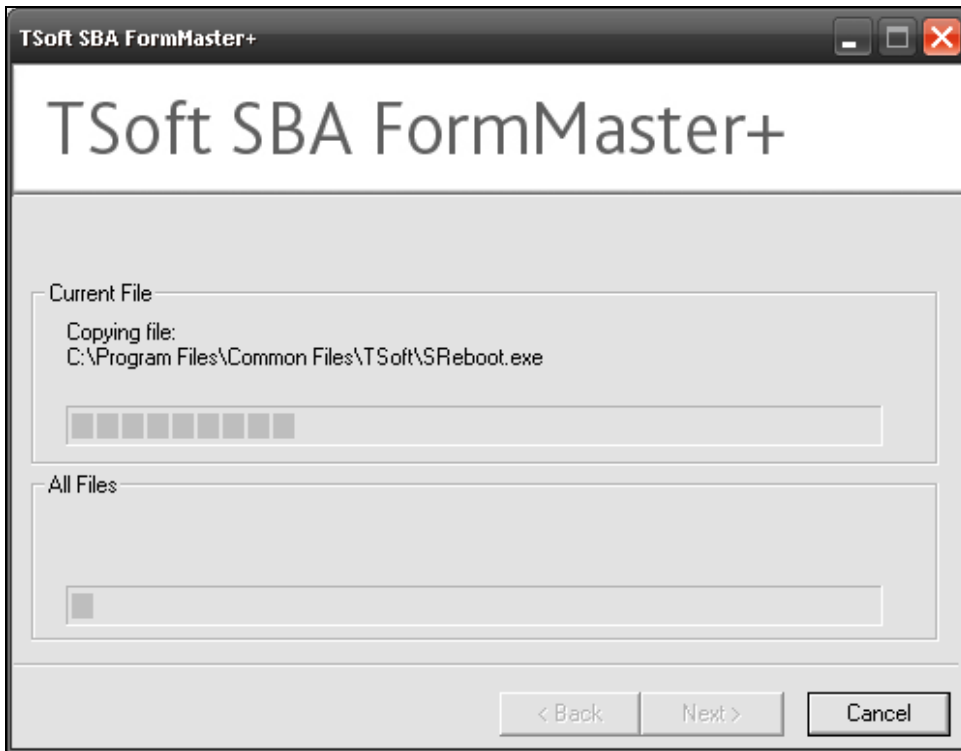


**Note:** You should install either to the default directory or to the directory where your previous version is located. If you are installing TSoft SBA FormMaster+ for the first time, the system will default C:\TCALC as the destination folder. If you are installing over a previous version of the software, the directory of the prior version will default as the destination folder.

8. Click **Next** to begin the installation.



9. The progress bar shows you the status of the installation.



10. When the installation is finished, click OK to restart your computer.



11. To begin using TSoft SBA FormMaster+, double click the TSoft SBA FM+ icon on your desktop. You can also select Start, Programs, TSoft, and then TSoft SBA FormMaster+.



# Configurations and Permissions

## Editing the Tcalc.ini File

The entries in the Tcalc.ini file will appear as follows in a default configuration:

```
[Directories]
ProgramDir=C:\TCalc
WriteUpDir=C:\TCalc\writeup
TemplateDir=C:\TCalc\template
DataDir=C:\TCalc\data
ExportDir=C:\TCalc\export
```

This is the normal directory structure. However, because there are situations in which a different setup may be required (for example, a network on which the program files are stored on one drive while the data files are stored on a different drive), no assumptions are made as to where the various directories are located. Instead, each time the software application loads, it reads the TCalc.ini file (located in the same directory as TCalc.exe). The Directories section of this file contains entries that the software application uses to locate its various subdirectories.

In order to facilitate an alternate setup, edit the appropriate lines. From the **File** menu, select **Program Setup** and then click the **File Options** tab.

For example, if you want to store the program files under the Programs directory on drive G and the remaining directories under the Data directory on drive H, you would make the following changes:

```
[Directories]
ProgramDir=G:\Programs\TCalc
WriteUpDir=H:\Data\writeup
TemplateDir=H:\Data\template
DataDir=H:\Data\data
ExportDir=H:\Data\export
```

This will allow TSoft SBA FormMaster+ to locate all of its files while allowing you to maintain your system in the way that you prefer.

To redirect users, who are currently running TSoft SBA FormMaster+ from their local computer to a network copy, set the icons/shortcuts on each user's computer so that the location property of each icon/shortcut points to the network copy of TSoft SBA FormMaster+. When the network copy is run, the TCalc.ini file that is located in the same directory as TCalc.exe is used to specify the location of the various directories. Be sure that all old data files have been moved to the network location and individual copies of TSoft SBA FormMaster+ are deleted from the individual computers.

Also, watch out for mapping problems. Assume, for example, that "P:" is mapped to P:\Apps and that the TSoft FormMaster+ data files are stored in P:\Apps\Tcalc\Data. If the path to the FormMaster+ data directory in the Tcalc.ini file is listed as P:\Apps\Tcalc\Data, the network will translate it to P:\Apps\Apps\Tcalc\data when TSoft SBA FormMaster+ attempts to access a data file.

## Setting Permissions to the TCalc Directory

Permissions must be set on the TCalc directory to ensure all files are accessible to the users. When TSoft SBA FormMaster+ is installed, no permissions are modified or set. You will need to adjust your administration methods to automatically reset the permissions and propagate them to new child objects. If administration methods are not set to automatically reset permissions, you will have to manually reset them for each update of TSoft SBA FormMaster+.

# Upgrades

Upgrades may be installed over the existing version of TSoft SBA FormMaster+.

1. Insert the CD-ROM into your CD-ROM drive.
2. The autorun program should start the installation. If the installation does not begin, select **Run** from the **Start** menu. Enter: X:\setup (where X is the CD-ROM drive letter). As an alternative, you can click the **Browse** button to browse to the contents on the installation CD, select the **setup.exe** file and click **OK**.

**Note:** If you do not have a CD-ROM drive, and your computer is part of a network, have your network administrator install the software from a CD-ROM drive located elsewhere on your network.

3. The Welcome screen appears. Click **Next** to continue.



4. Verify the Installation Location, or click **Browse** to select it, and click **Next**.



5. Click **Next** to begin the installation.

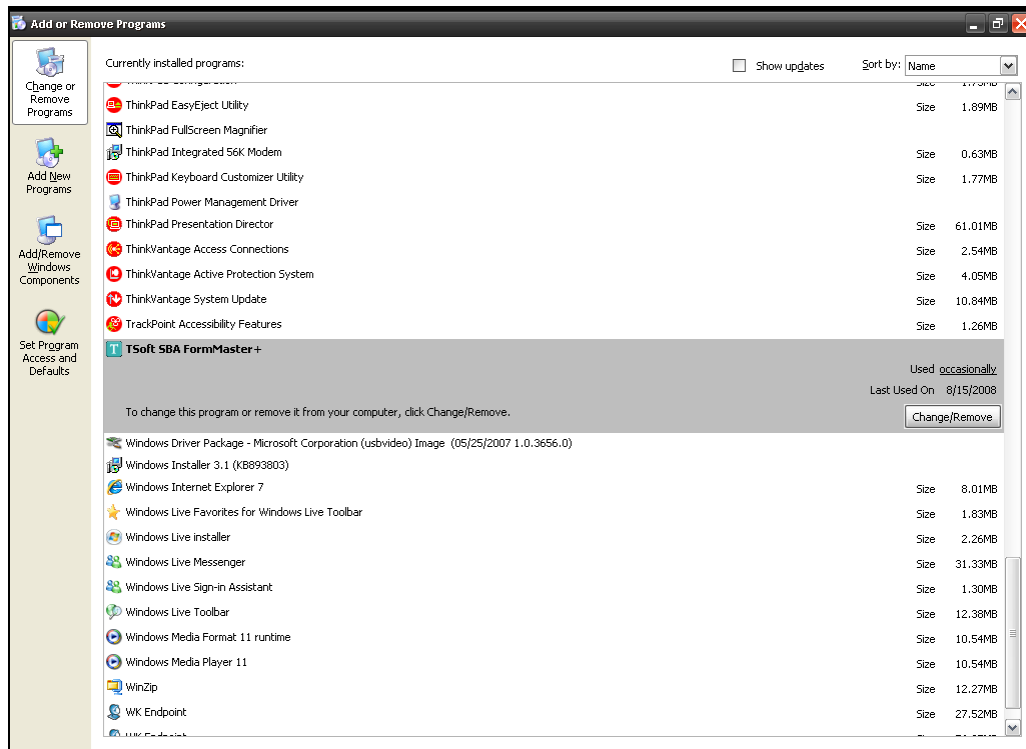


6. When the update completes, click **Finish**.

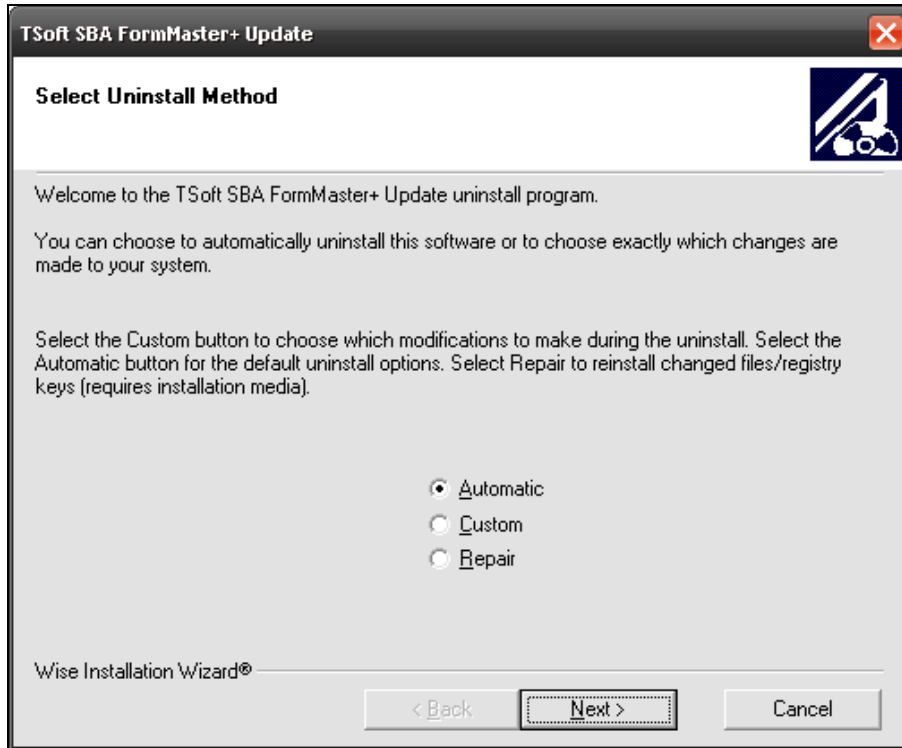


# Uninstall Instructions

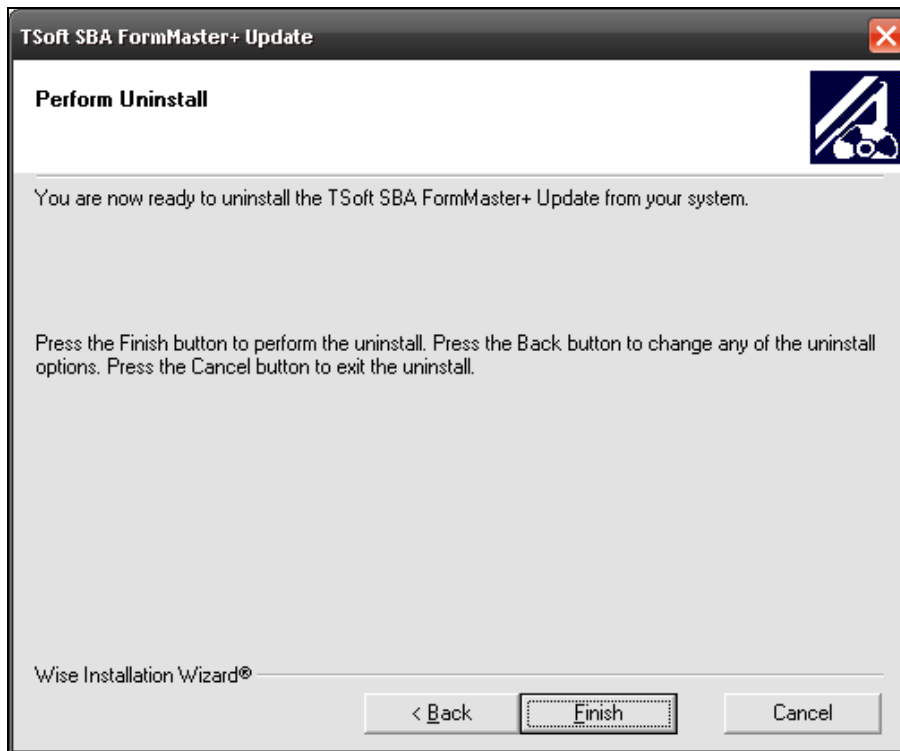
1. To uninstall TSoft SBA FormMaster+, open the Control Panel and double-click on **Add or Remove Programs**. Select **TSoft SBA FormMaster+** and click the **Change/Remove** button.



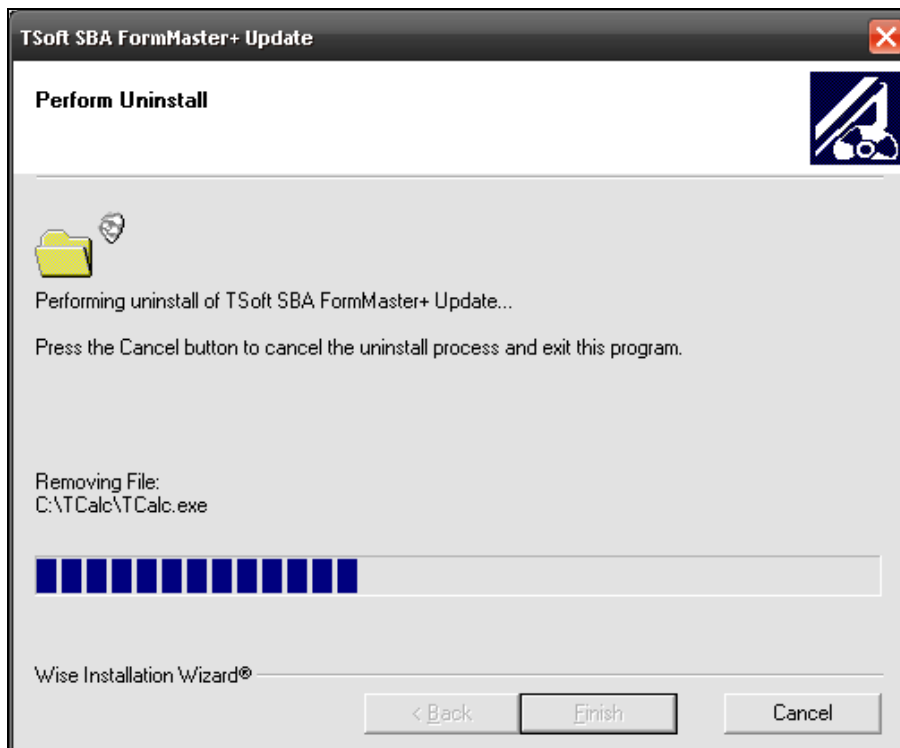
2. Choose **Automatic** to remove the entire application or **Custom** to remove only certain components. Select **Repair** to reinstall the application.



3. Click **Finish** to perform the uninstallation.



4. A progress bar appears during the uninstallation.



5. Verify that TSoft SBA FormMaster+ no longer appears in the Add or Remove Programs list.

# How to Contact Wolters Kluwer Financial Services

## Support Web Site

Our Software Support Web site is a valuable and convenient source of support information. Log on to <http://support.wolterskluwerfs.com> for submitting issues through E-mail.

## Call

You can telephone our SupportLine technicians at 1-800-274-2711, ext. 126511. Our technical support staff is available Monday through Friday, 7 A.M. to 7 P.M. CST. Voice mail operates continually, allowing you to leave a message after hours and on weekends. You can reach the TSoft SBA FormMaster+ voicemail directly at 1-800-274-2711, ext. 103638.

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

- Product name and version number
- Customer number (can be found on your invoice)
- Operating system and version number

## Fax

You may fax us at (800) 861-3181. Attention: SupportLine - TSoft SBA FormMaster+.

## Write

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

Wolters Kluwer Financial Services, Inc.

Attention: SupportLine

6815 Saukview Drive

P.O. Box 1457

St. Cloud, MN 56302-1457

