



Network Installation Guide

Mortgage Brain Premier Edition

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 premier

www.mortgage-brain.co.uk

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Scope and purpose of this document

This document is intended to record the requirements and procedures to successfully introduce the Mortgage Brain Broker product into a network infrastructure.

For networks where user numbers exceed 20 please contact us to discuss specific requirements.

At the time of writing, version 6.65 is the latest version of this software and this version (or newer) should be adopted. Mortgage Brain operates a policy of continual improvement so please call if you require the latest information on versions.

The following are outside the scope of this document, and are for the customer's consideration:

- Site security: Physical and logical security of hardware and networking components.
- Site environmental considerations: Heat, light, ventilation, fire suppression and power supply.
- DR and Business continuity: The customer will modify their Disaster Recovery and Business continuity plans as appropriate to reflect system and infrastructure changes.

Infrastructure requirements

In order to network the Broker suite of products we would recommend a LAN speed of at least 100mbps. Although the product will work on lower bandwidths (e.g. 10mbps) response times are unlikely to meet client requirements.

Wide area and remote access VPNs are unlikely to deliver the bandwidth we require and are not recommended.

Wireless network limitations and operating features means they are unlikely to be suitable for Broker.

Hardware requirements

Server

We would recommend using a dedicated Server.

The minimum (tested) specification for the Server is a single 2.4GHz CPU with 512mb ram and 20GB hard disk. Preference is for 1GB RAM as recommended by Microsoft. Network adapter should be capable of running at 100mbs.

Server operating system should be Windows 2000 Server (or better). There is currently no benefit to be realized from dual processors or Xeon technology. RAID should be considered where it fits the customers DR/BCP model.

On a small network (3-5 users) a dedicated Windows XP Pro (Server) PC will be suitable. Specification for the PC is identical to the preceding paragraph. Fault tolerance, monitoring potential and resilience are traditionally lower on a PC and these may influence the choice of Server platform.

Internet Explorer minimum version is IE6 or later. Adobe Reader should be version 7 or later.

Network Clients

Minimum specification for network PCs should be 800MHz CPU, 512MB Ram, 6 GB Hard disk. Network adapter should be capable of running at 100mbs. Supported operating systems are Windows 2000, Windows XP and Vista. Recommended operating system is Windows XP.

Internet Explorer minimum version is IE 6 or later. Adobe Reader should be version 7 or later.

General

The Server will need access to the internet in order to run updates. Broadband at 512kbs is our preferred medium. Any firewalls must allow access on port 80/443 for updates.

Local area network bandwidth of 100mb has been discussed in earlier sections.

Preparations

The Server should be built and configured with the operating system, Internet Explorer and Adobe Reader.

Windows updates should be applied in line with Microsoft recommendations. Backup routines should be instigated and tested. Event logs should be checked and should be 'clean'.

PCs should be built and configured with the operating system, Internet Explorer and Adobe Reader.

Windows updates should be applied in line with Microsoft recommendations. Event logs should be checked and should be 'clean'.

Network connectivity between Server and PCs should be established, tested and proved.

If any Broker version has previously been installed on either the Server or the PCs, then we can assist you in determining whether it is best to update or remove them. If the decision is to remove previous versions, then we can advise on the most appropriate removal method; the objectives being file removal and registry cleanup. Full backups should be taken before commencing any upgrade or removal activity.

Installation steps

Installation steps are listed below and should be completed in the order in which they appear.

On the Server:

- Make a full backup of the Server before starting the installation (this is best practice).
- Create a Folder called 'mbrain' (name of your choosing).
- Share the 'mbrain' folder.
- Allow all users full access to the 'mbrain' share.
- Map the 'M:' (letter of your choosing) drive on the Server to the 'mbrain' share. Please note you should use the same drive letter on each client PC.
- Insert the Broker software CD or run the setup routine downloaded from the web site.
- Select 'Next' on the Welcome screen.
- Accept the License agreement.
- Select 'Perform Server Installation'
- Select 'Next' then set the destination drive to 'M:' (the drive letter you previously mapped to the mbrain share).
- Select 'Next' then elect to make a backup of the existing installation if required.
- Select either "Workflow Menu Program" to run Broker in the workflow mode or "Original Menu Program" to run Broker using the original menu.
- Select 'Next' to start the installation.
- Register the product by calling our Service Desk on 0871-384-0194 and requesting that a new NETWORK installation is REGISTERED and PUT ONLINE. The Service desk will talk you through this process.

On each PC:

- Map the 'M:' (must be the same letter as that used on the Server) drive to the 'mbrain' share on the Server.
- Insert the Broker software CD.
- Select 'Next' on the Welcome screen.
- Accept the License agreement.
- Select 'Configure Workstation to allow access to existing installation'.
- Select 'Next' then set the destination drive to 'M:' (the drive letter you previously mapped to the mbrain share).
- Select 'Next' then elect to make a backup of the existing installation if required.
- Select either "Workflow Menu Program" to run Broker in the workflow mode or "Original Menu Program" to run Broker using the original menu.
- Select 'Next' to start the installation.

On the Server:

- Run broker: updating and maintenance, to download the latest rate, scheme and program enhancements.
- Setup Client Database Consultant details.

Notes

- The update utility (broker: updating and maintenance) needs to be run daily on the Server. This obtains the latest rate and scheme information, and also applies program enhancements.
- Each user automatically creates their own working directory under 'mbrain' \mbl on the Server to house their working and temp files. This directory name (by default) is the user's windows logon name shortened to 8 characters.
- You should avoid using windows logon names which contain a '.'. Example of a good windows logon name is JSmith. Example of a bad windows logon name is J.Smith.
- The 'Options-Set Username' facility imposes a fixed name to each PC (rather than relying on the user's windows logon name). The customer must ensure that these are unique. This facility should be used with care and must NOT be used in a Terminal Services or Citrix environment.
- In a Terminal Services or Citrix Server environment these servers play the role of the PCs. The Data Server performs a similar role and function as in 'a thick client environment', with installation steps being identical to those described earlier. The relative complexity of a thin client environment will probably mean that a customer will use a specialised 3rd party to assist them in setup and configuration.

Antivirus and Backups

We recommend that customers protect both Server and PCs with reputable antivirus software. Scans and definition file updates should be conducted at frequent intervals in line with their existing policy.

We strongly recommend that an effective backup cycle is instigated and tested at the earliest opportunity – preferably before our software is installed. Backups should be effected to removable media (e.g. Tapes, CDs, DVDs etc) which are stored off-site. Backups to internal devices do not cater for Server failure, nor do they offer an effective staged regression model.