

Desktop Client Installation Guide

LexisNexis® Bridger Insight™ XG 4.0

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Bridger Insight XG

LexisNexis® Bridger Insight™ XG helps your organization reduce risk by checking your input data against standard watchlists. You can manage your processing using workflow, case management, and reporting features. You can also purchase access to optional services to perform enhanced due diligence.

Optional Due Diligence Services

Depending on your product choice, you may have access to these optional due diligence services:

- LexisNexis® Anti-Money Laundering Solutions (for U.S. clients only)
- LexisNexis® FraudPoint® Score
- LexisNexis® InstantID®
- LexisNexis® InstantID® International
- LexisNexis® News
- Lexis® Diligence (for non-U.S. clients only)
- World-Check®

Optional due diligence services are available at an additional cost. Each service is distinct from BIXG and requires your organization to sign a separate agreement and, in some cases, to meet additional credentialing requirements prior to accessing these services. For more information on these due diligence services, contact your sales representative.

For more information on optional due diligence services, see the *Due Diligence Service Manual*.

For more information on World-Check, see the following knowledge base article on Client Services at:

<https://support.bridgerinsight.lexisnexis.com/clientservices/content/faq.aspx?id=743>

About This Guide

References to other sections of this document may be active hyperlinks. You can click on the link to take you to the referenced section.

You will find information and instructions on performing tasks in BIXG. For errors, troubleshooting, alternative functionality, and the most up-to-date product changes, see the Bridger Insight knowledge base available on the Client Services website at:

<https://support.bridgerinsight.lexisnexis.com>

You can also access a glossary defining industry and commonly-used terms on the Client Services website at:

<https://support.bridgerinsight.lexisnexis.com/clientservices/content/faq.aspx?id=1482>

To learn more about new and updated features in BIXG, see the release notes at:

<https://support.bridgerinsight.lexisnexis.com/clientservices/content/faq.aspx?id=1475>

A Help system is available from within the application. Press F1 to view a Help page associated with the window you are viewing.

Audience

Personnel responsible for installing, accessing, and setting up Bridger Insight XG Smart Clients and Browser Clients should use this guide.

Conventions

To give instruction, we use the following conventions to relate information.

Instruction Steps

The steps necessary to complete actions in BIXG are provided in this document. These instructions may include the results of the actions or other information to keep in mind as you complete the steps.

Text you should enter is shown in a different font.

For example: Type BridgerInsightXG in the Database field.

Right-click menus are only described in instructions if they are the only means of performing a task.

The following is an example of steps.

Sample Steps


- 1 Click **Print Report**.

The Watchlist Report is displayed in a Report Preview window.

- 2 Click **Print**.

Notes and Warnings

 This is a note icon. It precedes helpful information.

 This is a warning icon. It precedes information to help prevent you from negatively affecting your BIXG system or processes.

Documentation Suggestions

Your suggestions for document improvement are welcome. Send comments or suggestions via email to:

TechnicalPublications@lexisnexis.com

Or mail comments or suggestions to:

Technical Publications

LexisNexis®

1819 S. 22nd Avenue

Bozeman, MT 59718

USA



Support and Resources

Support and resources are available to help you make the most of Bridger Insight XG (BIXG).

Technical Support

Standard technical support is included at no additional cost with the BIXG annual fee. Premier Support is also available at an additional cost. For more information, contact your sales representative.

To access the knowledge base, Live Chat, Ask a Question, and other support services, you must first register for a free Client Services account at:

<https://support.bridgerinsight.lexisnexis.com>

Live Chat Support

Chat with one of our customer support representatives

Available: 8 a.m.–8 p.m. Eastern Time (UT -4/-5), Monday—Friday, excluding major U.S. holidays

United States Phone Support

Phone Number: 1 800 915 8930

Available: 8 a.m.–8 p.m. Eastern Time (UT -4/-5), Monday—Friday, excluding major U.S. holidays

United Kingdom Phone Support

Phone Number: 08-08 234 9605

Available: 9 a.m.–1 a.m. UT, Monday—Friday, excluding major U.S. holidays

Asia Phone Support

- Singapore: +65 6349 0122
- Japan: +65 6349 0192 or 00531 65 0560




- Hong Kong: +65 6349 0193 or 800 965 201
- China: + 65 6349 0194 or 400 120 2367

Available: 9 a.m.–6 p.m. Singapore time (UT +8), Monday—Friday, excluding major holidays

Other Areas Phone Support

Phone Number: +1 406 556 3055

Available: 9 a.m.–1 a.m. UT, Monday—Friday, excluding major U.S. holidays

 Support is offered in English through all standard support channels.

Client Services

The Client Services website provides access to related documentation, knowledge base articles, eLearning modules, and Web-based support: <https://support.bridgerinsight.lexisnexis.com>

Using your product code, create a Client Services account to:

- Search the knowledge base and request notifications of article updates.
- Submit, track, and update your product questions.
- Set up a profile of search defaults and contact information.
- Download software installation and upgrade executables.
- Download manuals, white papers, and training guides.
- Take eLearning courses.

Training

There is BIXG training offered at no additional cost. These instructor-led web trainings and eLearning modules are available at the Client Services website:

<https://support.bridgerinsight.lexisnexis.com/ClientServices/content/training.aspx>

Interface Overview

Users can access Bridger Insight XG through Smart Clients and Browser Clients. Each interface is designed to balance user needs with security, maintenance, and training considerations. As an administrator, take these considerations into account when deciding the appropriate interface for your users.

Smart Clients

Smart Clients are full-featured Windows[®]-based interfaces installed on client machines.

Use Smart Clients to:

- Perform real-time or batch searches
- Process alerts and manage the results database
- Create system-wide alert inbox filters
- Set required search fields
- Create predefined searches
- Create management reports
- Configure system settings and optional Automatic Batch
- Maintain accept lists, the White List, and custom watchlists
- Manage user access
- Monitor system history

This interface is best for users who must perform batch searching and administrative tasks in addition to real-time searching and alert processing.

Smart Client Requirements

The following are Smart Client hardware, software, and settings requirements.

Smart Client Software and Hardware Requirements

Component	Requirement
CPUs	1 GHz
RAM	Administrative users—1 GB Machines performing batch searches—1 GB End users—512 MB
HDD	300 MB free disk space
Operating System	One of the following: <ul style="list-style-type: none">• Windows 7• Windows Vista[®] SP1 or later• Windows[®] XP SP2 or later• Windows Server 2008 (32-bit)• Windows Server 2008 R2• Windows Server[®] 2003 SP2 or later

Smart Client Software and Hardware Requirements (Continued)

Component	Requirement
Third-party Software in InstallShield Wizard	.NET Framework 4.0 Client Profile (x86 and x64) Windows Installer 4.5 (5.0 can also be used but is not provided)
Third-party Software to Manage Reports	Depending on your business needs: <ul style="list-style-type: none">• To view reports in PDF format: Adobe® Reader• To view reports in Microsoft® Excel® format: Excel or other compatible software• To save completed internal suspicious activity reports: Adobe® Acrobat
Other Settings	1024x768 or higher screen resolution with 96 DPI TCP/IP network access Port available for network access (8085 is the recommended default) For client machines hosting Smart Clients, the Everyone account in the MachineKeys folder needs these permissions: <ul style="list-style-type: none">• Windows XP—create files/write data, write attributes, and write extended attributes.• Windows 7—Read & execute, list folder contents, read, and write. Users must have administrative rights to install Bridger Insight XG and some of the required supporting software. Users accessing Smart Clients via ClickOnce deployment must have permission to write to their user profile.

Browser Clients

Browser Clients are Web-based interfaces accessed through Microsoft® Internet Explorer®. Browser Clients are only available if your organization has purchased this component. The ability to simply distribute a URL to users reduces the IT overhead required for maintaining installed software.

Browser Clients allow users to:

- Set required search fields
- Create predefined searches
- Perform real-time searches

- View and process alerts

Browser Clients allow you to limit the functionality available to your users. This helps your organization reduce training costs and increase your system security.

Browser Client Requirements

The following are Browser Client hardware, software, and settings requirements.

Browser Client Requirements

Component	Requirement
CPUs	1 GHz
RAM	512 MB
HDD	300 MB free disk space
Operating System	One of the following: <ul style="list-style-type: none"> • Windows 7 • Windows Vista SP1 or later • Windows XP SP2 or later
Third-party Software	Adobe® Flash® Player 10.1 Microsoft® Internet Explorer® 7.0–9.0 with JavaScript™ enabled Depending on your business needs: <ul style="list-style-type: none"> • To view reports in PDF format: Adobe® Reader • To view reports in Microsoft® Excel® format: Excel or other compatible software • To save completed internal suspicious activity reports: Adobe® Acrobat
Other Settings	Pop-up blockers must be turned off.

Windows Regional Settings

The following Windows regional settings are supported for Smart Clients and Browser Clients.

- Albanian
- Alsatian (France)
- Armenian (Armenia)
- Azeri (Cyrillic)
- Azeri (Latin)
- Basque
- Belarusian
- Bosnian (Cyrillic, Bosnia and Herzegovina)
- Bosnian (Latin, Bosnia and Herzegovina)
- Breton (France)
- Catalan
- Chinese (Hong Kong S.A.R.)
- Corsican (France)
- Croatian
- Croatian (Bosnia and Herzegovina)
- Czech
- Danish
- Dutch (Belgium)
- Dutch (Netherlands)
- English (Australia)
- English (Belize)
- English (Canada)
- English (Caribbean)
- English (Ireland)
- English (Jamaica)
- English (New Zealand)
- English (Philippines)
- English (South Africa)
- English (Trinidad)
- English (United Kingdom)
- English (United States)
- English (Zimbabwe)
- Estonian
- Faroese
- Finnish
- French (Belgium)
- French (Canada)
- French (France)
- French (Luxembourg)
- French (Monaco)
- French (Switzerland)
- Frisian (Netherlands)
- FYRO Macedonian
- Galician
- Hebrew (Israel)
- Icelandic
- German (Austria)
- German (Germany)
- German (Liechtenstein)
- German (Luxembourg)
- German (Switzerland)
- Indonesian

- Irish (Ireland)
- isiXhosa (South Africa)
- isiZulu (South Africa)
- Italian (Italy)
- Italian (Switzerland)
- Japanese
- K'iche (Guatemala)
- Kiswahili (Kenya)
- Luxembourgish (Luxembourg)
- Malay (Brunei Darussalam)
- Malay (Malaysia)
- Maltese
- Maori
- Mapudungun (Chile)
- Northern Sotho
- Occitan (France)
- Polish
- Portuguese (Brazil)
- Portuguese (Portugal)
- Quechua (Ecuador)
- Quechua (Peru)
- Romanian
- Romansh (Switzerland)
- Sami, Inari (Finland)
- Sami, Northern (Finland)
- Sami, Northern (Sweden)
- Sami, Lule (Sweden)
- Sami, Skolt (Finland)
- Sami, Southern (Sweden)
- Scottish Gaelic (United Kingdom)
- Serbian (Cyrillic)
- Serbian (Cyrillic, Bosnia and Herzegovina)
- Serbian (Latin)
- Serbian (Latin, Bosnia and Herzegovina)
- Sesotho sa Leboa (South Africa)
- Setswana (South Africa)
- Slovak
- Slovenian
- Spanish (Argentina)
- Spanish (Bolivia)
- Spanish (Chile)
- Spanish (Colombia)
- Spanish (Costa Rica)
- Spanish (Dominican Republic)
- Spanish (Ecuador)
- Spanish (El Salvador)
- Spanish (Guatemala)
- Spanish (Honduras)
- Spanish (Mexico)
- Spanish (Nicaragua)
- Spanish (Panama)
- Spanish (Paraguay)
- Spanish (Peru)
- Spanish (Puerto Rico)
- Spanish (Spain)
- Spanish (Uruguay)
- Spanish (Venezuela)
- Swahili


- Swedish
- Swedish (Finland)
- Tamazight (Latin, Algeria)
- Tatar
- Tswana
- Turkish
- Ukrainian
- Urdu (Islamic Republic of Pakistan)
- Uyghur (PRC)
- Uzbek (Cyrillic)
- Vietnamese (Vietnam)
- Welsh
- Wolof (Senegal)
- Xhosa
- Yoruba (Nigeria)
- Zulu

Initial Setup

Before users across your organization can access Bridger Insight XG, a product administrator must:

- 1 Allow write permissions to the MachineKeys folder (if Smart Client users don't have administrative access to the folder).
- 2 Install initial Smart Client.
- 3 Create user accounts in the Smart Client.
- 4 Install .NET Framework 4.0 Client Profile on client machines (if users don't have administrative access to client machines).
- 5 Provide users with login credentials and URL access locations.

Once the initial setup is complete, users can install Smart Clients on their computers or access Browser Clients via the provided URL.

-  If users with different Windows login credentials will access the Smart Client from the same machine, each user must install a Smart Client instance.

Allow Write Permissions to MachineKeys Folder

- 1 On the machine hosting the Smart Client, navigate to the MachineKeys folder.

-  You must have administrative privileges to the folder to change the properties.

For Windows[®] XP, the default path is: C:\Documents and Settings\AllUsers\ApplicationData\Microsoft\Crypto\RSA\MachineKeys

For Windows 7, the default path is: C:\ProgramData\Microsoft\Crypto\RSA\MachineKeys

- 2 Right-click the folder and select **Properties**.
- 3 For Windows XP:
 - a Select the **Security** tab.
 - b Click **Advanced**.
 - c Select the Everyone account.
 - d Click **Edit**.
- 4 For Windows 7:
 - a Select the **Security** tab.
 - b Click **Edit**.
 - c Select the Everyone account.
- 5 For Windows XP, select **Allow** for these permissions:
 - Create files/write data
 - Write attributes
 - Write extended attributes
- 6 For Windows 7, select **Allow** for these permissions:
 - Read & execute
 - List folder contents
 - Read
 - Write

Other permissions previously allowed can remain.
- 7 For Windows XP, click **OK** and close the remaining dialog boxes.
- 8 For Windows 7:
 - a Click **Apply**.
 - b On the Security tab of the MachineKeys Properties dialog box, click **Advanced**.
 - c On the Advanced Security Settings for MachineKeys dialog box, select the **Replace all child object permissions with inheritable permissions from this object** check box.
 - d Click **OK** and close the remaining dialog boxes.

Smart Client Installation

Install Smart Clients on client machines using ClickOnce deployment. This technology ensures all client machines access the most updated version of BIXG. As a client machine accesses the BIXG server, ClickOnce technology verifies the product versions on the server and client machine are the same. If they are not the same, the Smart Client updates itself automatically.

Install a Smart Client

- 1 In an Internet Explorer browser, enter the BIXG Smart Client ClickOnce URL provided by your administrator.
- 2 On the BIXG website, click **Install**.

The website displays the name, version, and publisher of the software.


In addition, the website provides hyperlinks to Smart Client requirements, Bridger Insight Technical Support and to a website for ClickOnce and .NET Framework.

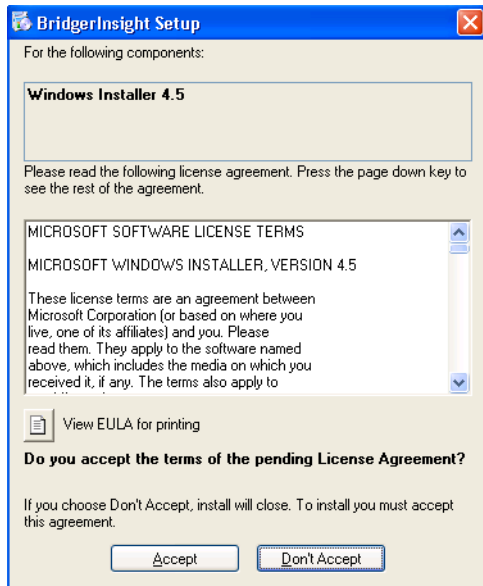
- 3 On the File Download dialog box, click **Run**.

You can also save the setup.exe and double-click it to begin the installation.

If an Internet Explorer Security Warning dialog box opens, click **Run**.


- 4 If the BridgerInsight Setup window displays to install Windows Installer 4.5:
 - a Read the license agreement.
 - b Click **Accept**.
 - c On the User Account Control dialog box, click **Yes**.

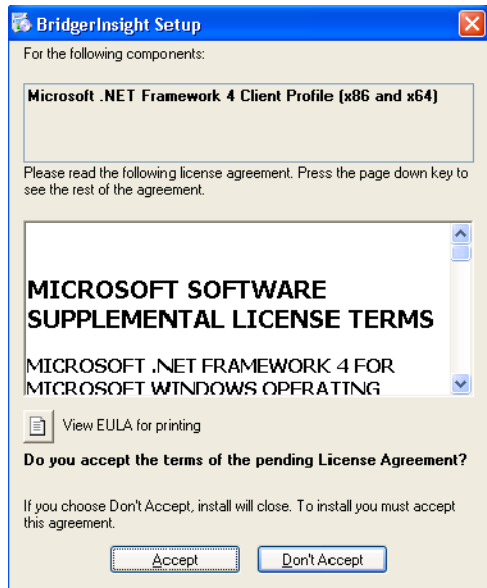
 If the user does not have administrative privileges on the client machine, cancel the setup and then have a user with administrative privileges on the machine install Windows Installer. The user who will log in and use BIXG should log in and restart these steps to install the Smart Client under their network ID.



5 If the BridgerInsight Setup window displays:

- a Read the license agreement.
- b Click **Accept**.
- c On the User Account Control dialog box, click **Yes**.

 If the user does not have administrative privileges on the client machine, cancel the setup and then have a user with administrative privileges on the machine install .NET Framework. The user who will log in and use BIXG should log in and restart these steps to install the Smart Client under their network ID.



- 6 On the Application Install - Security Warning window, click **Install**.

If you receive a proxy authentication error, see "Proxy Authentication Error" on page 18.

- 7 On the Bridger Insight XG Login window, log in to the Smart Client.

See the *Smart Client User Manual*, "Log In Overview" section.

- 8 If you are the product administrator deploying the first Smart Client:

- a Create user accounts.
- b Send to the appropriate staff:
 - User credentials
 - ClickOnce URL

For more information, see the *Smart Client User Manual*, "Users" section.

If you need to distribute information regarding the Browser Client, see "Browser Client Setup" on page 17.

- 9 To access a Smart Client:

- a Click **Start**.
- b Select **Programs>LexisNexis> Bridger Insight XG**.

For information on how to use the interface, see the *Smart Client User Manual*.

- ❓ To create a shortcut to BIXG, follow the path in this step. Instead of left-clicking on Bridger Insight XG, right-click and select Send to>Desktop (create shortcut).

Browser Client Setup

Users access a Browser Client using a client ID, user ID, and password via a URL. This information is provided by the product administrator. For information on how to use the interface, see the *Browser Client User Manual*.

Before any users can log in to Browser Clients, the product administrator must set up user accounts through a Smart Client. For more information on user accounts, see the *Smart Client User Manual*, "Users" section.

Access a Browser Client

- 1 In an Internet Explorer browser, enter the URL provided by your administrator.
- 2 On the Bridger Insight XG Login page, log in to the Browser Client.

If you receive a proxy authentication error, see "Proxy Authentication Error" on page 19.

Proxy Authentication Error

If your organization is using a proxy server, you may encounter a proxy authentication error when installing or accessing a Smart Client or Browser Client. There are several options that may resolve the error, including:

- Modify your proxy server settings to allow BIXG-related traffic. Change the outbound web proxy server to not require authentication for the Smart Client:

<https://bridgerinsight.lexisnexis.com/smartclient>

<https://bridgerinsight2.lexisnexis.com/smartclient>

Or for the Browser Client:

<https://bridgerinsight.lexisnexis.com/browserclient>

<https://bridgerinsight2.lexisnexis.com/browserclient>

Detailed steps for this procedure vary depending upon the proxy software in use.

- Modify the .NET Framework file on each computer in a text editor:

- a Open the .NET Framework file.

For 32-bit operating systems, the default path is:

C:\Windows\Microsoft.NET\Framework\v4.0.30319\Config\machine.config

For 64-bit operating systems, the default path is:

C:\Windows\Microsoft.NET\Framework64\v4.0.30319\Config\machine.config

- b Search for the <system.net> tag.

- c Replace all information from <system.net> to </system.net> with:

<system.net>

<defaultProxy enabled="true" useDefaultCredentials="true">

<proxy usesystemdefault = "true" bypassonlocal = "true"/>

</defaultProxy>

</system.net>

If this system.net tag is not present, add this text to the end of the file.