# Merrill Edge **MarketPro**<sup>®</sup> Installation and troubleshooting guide **MERRILL**

Use this guide to help with installing Ice WebStart, problems launching MarketPro, or to help resolve any performance issues. If you still need help after completing the steps in this guide, please <u>contact us</u>.

# SYSTEM REQUIREMENTS

	Operating System	Browser	ICE WebStart
Recommended	Windows 7 or higher Mac OS 10.14 or higher*	Internet Explorer 11 or higher Firefox 66 or higher Chrome 73 or higher Microsoft Edge 17 or higher Safari (Mac) 10 or higher	ICE WebStart must be installed to launch MarketPro – <u>Install</u> <u>steps</u>

\*The RTD Excel plugin is Microsoft compatible only, and is not supported on a Mac system.

Can I use something	You may be able to use different or other versions of browsers or operating systems to
other than	access MarketPro. However, you should be aware that there may be minor problems or
recommended level?	performance issues that we may not be able to fix should they be discovered.

Other Requirements:

- Cookies enabled
- Pop-up blocking disabled, or pop-ups allowed for Merrill Edge and MarketPro URLs
- Internet Connection: DSL, Cable or other broadband type connection is recommended
- Memory: 2 GB RAM
- Processor: Pentium 4 2.0 GHz equivalent or greater for optimal performance
- PDF content requires Adobe Reader 6.0 or later
- Ability to connect to the internet through port 80, 443 or 2812

# **INSTALLING ICE WEB START**

ICE WebStart (IWS) is a replacement technology for Oracle's Java Web Start (JWS). There is no action required if you have ICE WebStart already installed. If you are a new user, or not able to see the ICE WebStart installed on your machine, please install ICE WebStart using the following link:

https://www.theice.com/launch

#### Windows installation steps

- 1. Access the link above and select Windows 64-bit or Windows 32-bit next to ICE WebStart.
- 2. Open the downloaded file, and follow the installation steps on screen

ісе	Markets	Clearing	Data	About	Insights		
La	uncl	า					
Downloa	ıd					Operating System	Description
ICE Web	Start					Windows 64-bit   Windows 32-bit) MacOS	Installer for ICE WebStart

#### Mac installation steps

- 1. Access the link above and select Mac OS next to ICE WebStart.
- 2. Open the downloaded file to unzip it if required (the Safari browser may automatically unzip the file)
- For optimal performance, move ICEWebStart.app to ~/Users/<username>/Applications (create this folder if it does not exist)

ісе	Markets	Clearing	Data	About	Insights		
La	unch	ı					
Downloa	d					Operating System	Description
ICE Web	Start					Windows 64-bit   Windows 32-bit   MacOS	Installer for ICE WebStart

# VERIFYING AND TESTING INSTALLATION

You can confirm you have IWS installed by checking **Programs and Features** from the **Control Panel** (Windows 7) or **Apps & Features** from **Settings** (Windows 10)

							<b>×</b>		
Control Panel	<ul> <li>All Control I</li> </ul>	Panel Items 🕨	Programs and Features	▼ 4) ICI	E WebStart		×		
Control Panel Home View installed updates	Unin: To uni	Uninstall or change a program To uninstall a program, select it from the list and then click Uninstall, Change, or Repair.							
Turn Windows features on or off	0								
Install a program from the	Organize	Uninstall	Change Repair	Installed On	Size	Version	•		
network	ICE Web	oStart	Intercontinental Exchange, In	. 6/18/2019	97.1 MB	1.0.0			
	гсе	Intercontiner	ntal Exchange, Inc. Product vers	ion: 1.0.0 Size: 97.1 MB					
← Settings							×		
命 Home		Apps & t	features						
Find a setting	Q	Choose whe	ere to get apps			Related settings Programs and Fe	eatures		
Apps		Installing apps	only from Windows Store helps p	protect your device.					
		Anywhere	~			Have a question	?		
						Update apps			
∃ Default apps		Apps & feat	tures			Troubleshoot Mi	crosoft Store apps		
邱 Offline maps		Optional featur	res			Change startup a	apps		
Apps for websites		App execution	aliases			Get help			
□ Video playback		Search, sort, an move an app, s	d filter by drive. If you would like elect it from the list.	to uninstall or		Make Windows	hetter		
☐ Startup		Ice WebStart	×			Give us feedback	(		
		Sort by: Name	$\checkmark$ Filter by: All drives $\checkmark$						
		ICE Wel	bStart	97.1 MB 10/15/2019					

On macOS, open a new Finder window and search for **ICEWebStart** (select "This Mac" if needed) and ICEWebStart should appear in the results:



# **Testing IWS installation**

Go to <u>https://www.theice.com/launch</u> and click on Launch next to ICE WebStart Test to verify if your IWS installation is working properly.

Download	Туре	Description
ICE WebStart Test	Launch	Default test

#### You should see this screen:

🛃 ICE WebStar	t Test —		×
	ICE WebStart is working!		
Launch Method:	ICEWS		
Operating System:	WINDOWS		
Bit Size:	64		
Attributes			
java.home:	C:\Users\User\AppData\Local\ICE\IWS\shared\openjdk-jre-win-64\8.0.192.ICE.1\openjdk-jre-win-64-	8.0.192.IC	Œ.1
java.version:	1.8.0_192		
iws.script:	C: \Users \User \AppData \Local \ICE \IWS \iws.bat		
iws.version:	2.2.0		
	Exit		

You are now ready to launch MarketPro

# LAUNCHING ON A MAC

Depending on your security settings, mac OS may block icews files when opening for the first time. Follow the steps below to allow .icews to launch on your mac.

#### Safari

1. Click on the downloads icon, then click the magnifying glass to show the .icews file in Finder

C	0	Ê ₽
Merrill Edge MarketPro	Downloads mq20200108.icews Show in Finder	Clear

#### 2. Right click on the .icews file, select Open With, and select ICEWebStart (default)

	ov 😳 🖉 🗸 🗑	wnloads	Q s	earch		_
Name		Size	Kind		Date Added	~
mq202001	Open		De	escriptor	Today at 12:01 PM	1
	Move to Trash			App Stor	e	
	Get Info Rename			Other		

#### 3. Click on Open



## Chrome

1. Click the arrow in the downloads bar and select **Show in Finder** 



## 2. Right click on the .icews file, select **Open With**, and select **ICEWebStart (default)**

	💽 Dov	wnloads	Q	Search		
Name		Size	Kind		Date Added	~
mg202001	Open			Descriptor	Today at 12:01 PM	•
	Open With			🔜 ICEWe	ebStart (default)	J
	Move to Trash			App Stor	e	
	Get Info Rename			Other		)

## 3. Click on Open

	macOS cannot verify the developer of "ICEWebStart". Are you sure you want to open it?
<u> </u>	By opening this app, you will be overriding system security which can expose your computer and personal information to malware that may harm your Mac or compromise your privacy
	Chrome downloaded this file today at 11:54 AM from marketq.fs.ml.com
?	Move to Trash Open Cancel

# Firefox

1. Click on the downloads icon, then click the magnifying glass to show the .icews file in Finder

	▽ ☆	<u>↓</u> III\ 🗉 🔹 =
Log Oi	nq20200108.icews Show In Finder	٩
Quote or	Show All Downloads	

2. Right click on the .icews file, select Open With, and select ICEWebStart (default)

Image: Operation of the second se						
Name		Size	Kind		Date Added	~
ng202001	Open			Descriptor	Today at 12:01 PM	
_	Open With		•	🖵 ICEWe	ebStart (default)	
Move to Trash				App Stor	e	
_	Get Info Rename			Other		

## 3. Click on **Open**

	macOS cannot verify the developer of "ICEWebStart". Are you sure you want to open it?
<u> </u>	By opening this app, you will be overriding system security which can expose your computer and personal information to malware that may harm your Mac or compromise your privac
	Firefox downloaded this file today at 12:07 PM from marketq.fs.ml.com.
?	Move to Trash Open Cance

If ICEWebStart does not show as an option to Open With, select **Other**, type **ICEWebStart** into the search box at the top left, select **ICEWebStart** from the results pane, check "**Always Open With**" and click **Open** 

	O Downloads □ □ □ □ □ □ ↓ ↓ ↓ □ □ Q Search	
	Choose an application to open the document "mq20200109.icews".	ß
Favorites Recents Applications Desktop Documents Downloads Locations Cloud Drive	Search: This Mac "Applications" Today	Save +
Options		Open

# **FILE ASSOCIATION**

Most browsers allow capability to open ".icews" launch file automatically, but it requires an initial setup. This one time setup will expedite future launches of MarketPro. Before following the steps please ensure that you have installed ICE WebStart successfully on your machine.

#### **Chrome – Windows**

Step 1: Once the application is downloaded and visible in the bottom left, select the arrow pointing up, and select "Always open files of this type" and then click on the file name to launch

	Open Always open files of this type
	Show in folder
	Cancel
📮 mq20191009.icews	~

Step 2: After this setup, the Chrome browser will auto-launch ".icews" files and open the application without requiring any additional clicks.

#### Firefox – Windows

Step 1: When downloading the file the below box will appear. Check the box that says "Do this automatically for files like this from now on"

Opening mq20191009.icews	×
You have chosen to open:	
👷 mq20191009.icews	
which is: ICE WebStart Descriptor	
from: https://marketq.fs.ml.com	
What should Firefox do with this file?	
what should riferox do with this file:	
Open with icews_auto_file (default)	
○ <u>S</u> ave File	
☑ Do this <u>a</u> utomatically for files like this from now on.	
Settings can be changed using the Applications tab in Firefox's Options.	
OK Cancel	

Step 2: After this setup, Firefox browser will auto-launch ".icews" files and open application without requiring any additional clicks.

#### Edge – Windows

Step 1: Click Open when prompted. The Edge browser currently does not have an option to skip this step.

What do you want to do with mq20191118.icews? From: marketq.fs.ml.com	Open	Save		Cancel	×
Internet Explorer – Windows Step 1: Click "Save"					
Do you want to open or save <b>mq20191009.icews</b> from <b>marketq.fs.ml.com</b> ?	Open	Save 🔻	Cancel ×		
Step 2: Click "View Downloads"					
The mq20191009.icews download has completed.	Open 🔻 Open fold	ler View dow	nloads 🛛 🗙		

🛃 View Downloads - Internet Explo	rer		_		×
View and track your downl	oads	Search downloads			٩
Name	Location	Actions			
mq20191009.icews marketq.fs.ml.com	Delete file		)p	en 🔻	×
	Copy download lin Go to download w Open containing f	nk rebpage older			
	<ul> <li>Always ask before</li> </ul>	opening this type of file			
	Report that this file Rerun security che	e is unsafe cks on this file			
Options		Clear I	ist	Close	

Step 3: Right click on file: Uncheck "Always ask before opening this type of file".

Step 4: After this setup, IE browser will auto-launch ".icews" files and open application without requiring any additional clicks.

## Safari - macOS

Click on the downloads icon, (you might need to switch back to Merrill Edge website to view the icon), and then click the magnifier icon. Safari security settings do not allow the .icews to be opened automatically.

	0 +
Downloads	Clear
mq20191118.icews	۲

#### **Chrome - macOS**

Step 1: Once the application is downloaded and visible in the bottom left, select the arrow pointing up, and select "Always open files of this type" and then click on the file name to launch

	Open Always Open Files of This Type
ma20191118 icews	Show in Finder
	Cancel

Step 2: After this setup, the Chrome browser will auto-launch ".icews" files and open the application without requiring any additional clicks.

#### **Firefox - macOS**

Step 1: When downloading the file the below box will appear. Check the box that says "Do this automatically for files like this from now on"



Step 2: After this setup, Firefox browser will auto-launch ".icews" files and open application without requiring any additional clicks.

# TROUBLESHOOTING

#### **Proxy settings**

Proxy Connection configuration setting can be set by finding the "**Configure ICE WebStart**" button from the start menu or searching for **ICEWebStart** in a mac finder window (select **This Mac** if the application is not found). The dialog box gives identical options to set proxy settings as found in the Java control panel.

The most common setting is "Use system settings". Contact your network administrator for server/port information if you need to use a proxy server.

00	Configure ICE WebStart
	About Apps Proxy Security Advanced
🗿 Use sys	tem settings
🔵 Use aut	omatic proxy configuration script
Script U	RL:
🔿 Use pro	oxy server
Address	Port: Advanced
Вур	ass proxy server for local addresses
Do not i	use proxy server for addresses beginning with
Use sem	nicolon (;) to separate entries.
O Direct o	connection
	OK Cancel

## **Application Whitelisting**

If your anti-virus software implements application whitelisting, the following applications, running from the IWS directories noted above, will need permission to execute:

#### Windows

o Java.exe o Javaw.exe

#### MacOS

o Java

# **Clear IWS Cache**

Clearing the cache may help resolve technical issues

- Open ICE WebStart
  - Windows: Open Configure ICE WebStart from the start menu
  - Mac: Open a new finder window and search for ICEWebStart (select This Mac if icon does not appear)
- Click on Apps
- Click the trash can icon next to Merrill Edge MarketPro

Configure	ICE WebStart		_	
About Apps	Proxy Securi	ity		
L	Merrill Edge M .ast Usage: 10/0 Show Logs Dele	MarketProut 08/2019 07:24 ete Logs	2019	.4
	O	K Canc	el	

## Logs

If you need to send us log files for any reason, these steps will allow you to obtain them.

- Open ICE WebStart
  - Windows: Open Configure ICE WebStart from the start menu
  - Mac: Open a new finder window and search for ICEWebStart (select This Mac if icon does not appear)
- Click on Apps
- Click **Show Logs** and the folder containing log files will be opened.

Configure ICE WebStart							
About	Apps	Proxy	Security	Advanced			
Merrill Edg Last Usage: 11 Show Logs	e MarketP 1/18/2019 1 Delete Log	2ro ut 16:39 35		2019.	4		
	Oł	K	Cancel				

# Uninstall / Reinstall IWS

Reinstalling IWS may also help resolve technical issues

#### Windows

- Close all browser windows
- Windows 7: Open the Control Panel and Select or search for Programs and Features
- Windows 10: Open Settings and select Apps
- Select Ice WebStart from the list and click Uninstall

L ice

1.0.0

• If multiple versions of Ice WebStart are present, repeat until all have been uninstalled

							×	
😋 🔾 🗢 🧱 🕨 Control Panel 🕨	All Control Pane	Items 🕨 Programs an	d Features	✓ 4y ICE	WebStart		×	
Control Panel Home View installed updates	Uninstall or change a program To uninstall a program, select it from the list and then click Uninstall, Change, or Repair.							
off	Organize 🕶 Uninstall Change Repair					0		
Install a program from the network	Name	Publisher		Installed On	Size	Version		
	🕞 ICE WebStart	Interconti	nental Exchange, Inc.	6/18/2019	97.1 MB	1.0.0		
							_	
	Inte	ercontinental Exchang	e, Inc. Product versior	n: 1.0.0				
	Lice		5120	E: 97.1 IVID				
← Settings						_		
යි Home	Apps	& features						
Find a setting	P Choose where to get apps			Related settings				
Anne	Programs and Features							
Аррэ	Anywhe	re	~ ]					
≣ Apps & features	/ in the second se			Have a	Have a question?			
	Apps & features			Update	Update apps			
:=+ Default apps					Iroubleshoot Microsoft Store apps			
邱 <u>1</u> Offline maps	Optional features			Chang	Change startup apps			
Apps for websites	App execution aliases				Get he	Get help		
D1 Video alaukask	Search, so	Search, sort, and filter by drive. If you would like to uninstall or						
ишео ріаураск	move an a	move an app, select it from the list.			Make	Make Windows better		
☐ Startup	ICE WED	Give us feedback						
	Sort by: N	lame ∨ Filter by: All	drives $\checkmark$					
		WebStart	97	7 1 M P				

If Ice WebStart will not uninstall, it may be due to a corrupted registry. This can usually be resolved using the following <u>Microsoft Support Action</u>

Modify

10/15/2019

Uninstall

#### Mac

- Close all browser windows
- Open a new Finder window
- Search for ICEWebStart (select This Mac if the application does not appear)
- Right click on any files named ICEWebStart and select Move to trash



After uninstalling, follow the installation steps to reinstall

# FAQ

Q. I get an error message "Failed to validate one or more resources"

A. This is most commonly caused by invalid proxy settings. Please review <u>proxy settings</u> and check with your network administrator or ISP for further assistance.

Q. Does IWS require special permissions to install or run (i.e. administrator)?

A. No special permissions are required.

Q. Are there any requirements IT should be made aware of (i.e. additional ports on firewall)?

A. Concurrent instances of IWS on the same machine will attempt to coordinate with one another via ports in the range of 6700 to 6800. These are only used to communicate with localhost, so these do not need to be open beyond the single machine. If they are not open on the single machine then IWS will still run, but there is a possibility of data corruption if the instances are not able to properly coordinate.

Q. What version of Java is being used by IWS?

A. IWS is currently running on OpenJDK 8u192.

Q. Will the Java version used by IWS get updated with security patches?

A. Yes, IWS will automatically check for updates upon each launch.

Q. Will the IWS application get downloaded every time user invokes it? A. No.

Q. Will the client application launched by IWS get downloaded every time user invokes it? A. No, only when changes to the application are detected.

Q. How big is the download?

A. 40mb for Windows and Linux, 70mb for MacOS

Q. How do I know if the IWS is correctly installed and working on my machine?A. Go to <u>https://www.theice.com/launch</u> site and click Launch next to "ICE WebStart Test".

Q. Where is IWS installed? Windows: C:\Users\<username>\AppData\Local\ICE\IWS\ MacOS: \$HOME/Library/Application Support/ICE/IWS

Q. Where can I find log files? Windows: C:\Users\<username>\AppData\Local\ICE\IWS\logs MacOS: \$HOME/Library/Application Support/ICE/IWS/logs

# STILL NEED HELP?

You can reach us any time by calling **877.653.4732**.

Investment Center representatives are available 24 hours a day, 7 days a week.

More contact information

#### Investing involves risk. There is always the potential of losing money when you invest in securities.

Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation ("BofA Corp."). MLPF&S is a registered broker-dealer, a registered investment adviser, Member <u>Securities Investor Protection Corporation</u> (<u>SIPC</u>) and a wholly owned subsidiary of BofA Corp.

Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value

 $\ensuremath{\mathbb{C}}$  2021 Bank of America Corporation. All rights reserved.