



Quick Update Guide for ComplianceOne Client

January 2012

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Before You Begin

- If you plan to install this update using a process that differs from these instructions, please [contact SupportLine](#) to discuss your options.
- If you are installing a client on a machine with no pre-existing client installation, please see the **New Client or Terminal Server Installation** section of **Installation Instructions for Updates**, which is a detailed installation guide.
- Review the ComplianceOne® system and software requirements.
 - Available on the SupportLine web site: <http://support.wolterskluwerfs.com>.
- Ensure prerequisite software is installed prior to the client installation.
 - Prerequisite software includes SOAP 3.0, Microsoft .NET Framework 2.0, .NET Framework 4, and Silverlight.
 - View installed applications in Control Panel > Add or Remove Programs. IF needed, the applications are included on the ComplianceOne CD in the Applications\Utilities folder.
- Verify the version of ComplianceOne that is currently on the client.
 - This installation program only supports the update of ComplianceOne Release 2011.3 to Release 2011.4.
 - To check the current installed version, launch administration and note the version number in the lower right corner of the logon window.
- Carefully review the current Release Notes issued with this release, so that you and other users can be prepared for changes.

The following step **MUST** be performed before installing ComplianceOne on a client:

- Ensure that the name and IP address of the ComplianceOne application server (if used) and each work station have been added as Trusted Sites in Internet Explorer. For detailed information please see the complete **Installation Instructions for Updates**.

Client Update Installation

Use this section for updating the client software on the client computer or via the Terminal Services application server:

This installation cannot be done remotely but must be completed machine-side.

- ❑ On the client machine, logon to the network as an Administrator.
- ❑ Temporarily disable the client PC's virus scanning software.
- ❑ **Install from CD:**
 - Place your ComplianceOne CD into the CD-ROM drive of the computer.
 - Open Windows Explorer and navigate to the root folder of the CD.
 - *Windows Server 2008 32-bit, Windows Server 2008 R2 64-bit or Windows 7 Professional 32-bit and 64-bit systems:* Right-click on **setup.exe** and select **Run as Administrator** from the context menu.
 - *Other Windows systems:* Double-click **setup.exe**.

OR

- ❑ **Install from network drive:**
 - Open Windows Explorer and navigate to the Client_Install folder located in the ComplianceOne share on your ComplianceOne server.
 - *Windows Server 2008 32-bit, Windows Server 2008 R2 64-bit or Windows 7 Professional 32-bit and 64-bit systems:* Right-click on **ComplianceOneClientSetup.exe** and select **Run as Administrator** from the context menu.
 - *Other Windows systems:* Double-click **ComplianceOneClientSetup.exe**.
- ❑ On the **Welcome** window click **Install ComplianceOne Solution**.
- ❑ Agree to the Documentation Agreement that you have read the release documents and click **Next**.
- ❑ On the **Custom Setup** window:
 - ❑ Select client features. Features from the previous release are selected by default.

- **Ensure you only install features for which you have purchased a license.**
- **You must have purchased a license for the new Mortgage feature in order to use it.**
- **Installing an unlicensed feature places an icon on the desktop that gives an error message when clicked.**

- ❑ On the "Install to:" section, verify the path is correct.
- ❑ Click **Next**.

- On the **Server Destination Folder** window, verify the server path. Click **Next**.
 - If any difficulties are encountered, you may see a server error listed in the error table.
- On the **Client Ready to Install** window, click **Install**.
- On the **Installation Completed** window, click **Finish** twice: once to end the client installation and again to complete the All-in-One Component installation.
- In the reboot notification prompt, click **Yes** to restart your machine.
 - If you click **No**, the installation will end but do not use ComplianceOne without a reboot.

Client Update on Terminal Server

Use these instructions if you currently have only the client on the Terminal Services server. Use the **Update Installation Instructions for Servers and Standalone Systems** if your configuration has separate application and database servers.

- Ensure that all users exit Terminal Services prior to applying this update.
- Place the Terminal Server into Install Mode, using one of the following methods:
 - Open the **Add/Remove Programs** applet in Control Panel, select **Install** and select the installation method (either CD or network).
 - Open the command prompt:
 - *In Windows Server 2008 32-bit, Windows Server 2008 R2 64-bit or Windows 7 Professional 32 and 64-bit systems:* Select **Start > All Programs and Accessories**. Right click **Command Prompt** and select **Run as administrator**.
 - *In older systems:* Select **Start > Run...** Type **CMD** and click **OK**.
 - At the command prompt, type: **Change User /Install**. Press **Enter** and close.
- Proceed with the [Client Update Installation](#).
- When the installation is complete, restart the server. After the restart Terminal Server will be in Execute mode.

Post Installation

Log Files

- An install log file will be created for each component that initiated an installation.
- The install logs will be placed in a root documents folder, the exact location of which depends on your operating system: e.g., C:\Users\Public\ or C:\Documents and Settings\All Users.
- The logs record both the successful and unsuccessful operations during the product update installation.
- Logs are particularly helpful when you encounter an error.
- Logs can be opened and read in a text editor such as Notepad.

Additional Documentation

See the comprehensive guide, **Installation Instructions for Updates**, for detailed help with component installation, error messages, and troubleshooting.

How to Contact Us

Support Web Site

Visit our Software Support Web site for documentation downloads, frequently asked questions, training, or support information at the following location: Support.WoltersKluwerFS.com.

We believe you will find this to be a valuable and convenient source of support information as well as links to beneficial industry sites.

Downloading

To access the documentation as noted above and in the installation, go to our Software Support Web site, Support.WoltersKluwerFS.com. Select Log In from the upper right corner. Enter your User Name and Password. If you are new to this site, register for a User Name and Password. Once you are logged in, follow the links for ComplianceOne documentation.

E-Mail

Questions related to the installation process may be sent to ComplianceOneTechSupport@wolterskluwer.com.

Phone

You can telephone our SupportLine technicians at 1-800-274-2711, ext. 1123660. Our support staff is available Monday through Friday, 7 A.M. to 7 P.M. CST. Voice mail operates continually, allowing you to leave us a message after hours and on weekends. To help us handle your question as quickly as possible, have these items available before you call:

- product name and version number
- customer number
- operating system and version number; service pack numbers, if installed

Fax

You may fax us at (320) 240-4252.

