

Custom Document Installation

Custom, Privacy, and Credit Insurance

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Introduction

This guide provides instructions for installing and configuring Privacy, Custom, and Credit Insurance documents for use with ComplianceOne®.

About Custom Document Installation

This document provides information on how to install and configure custom documents provided by Wolters Kluwer Financial Services. Two installation processes are included; first, you will find instructions for installing Privacy and Custom documents. The remainder of the document provides instructions for installing Credit Insurance documents. (These credit insurance documents currently require a different set of installation instructions than the Privacy and Custom documents do.) Note that there are some custom forms that use the same installation procedure as the credit insurance installation. Refer to your packing slip if you have questions about which custom installation step you should follow. Custom forms with the support code of COCX follow the credit insurance installation procedure, while custom forms with the COGP and COEFRM codes follow the privacy/custom instructions. (Credit insurance documents do not currently have a support code implemented.)

Identifying Document Install Type

In order to know which set of instructions to follow, you need to know which type of form you are installing. The Custom document installation CD is fairly generic in nature, but by following a few easy steps, you can quickly determine which type of document is delivered on this CD.

Note

We are updating our custom form installation process, which will simplify the install. Until that is available, the following steps will help you determine which installation procedure you need to follow.

Privacy/Custom Documents

Privacy and Custom documents are delivered on a CD in the form of a .ZIP file which must first be extracted in order to run the installation.

Included in the .ZIP file is a Release Notes document (a Word document), providing information about the custom form you are about to install, along with the install.exe file.

Credit Insurance Documents

Credit Insurance documents are delivered on a CD in the form of a .EXE file. This .EXE file is used to install the Credit Insurance form, and can be found by browsing the contents of the CD to the following location:

X:\Custom Forms\setup.exe

Note

Do not use the .exe file found at the root of the CD. This file will not install your credit insurance form.

Custom Forms

There are a number of custom forms that follow the credit insurance installation steps. If your CD contains a custom form in a .EXE format (and not a .ZIP) you should instead follow the credit insurance installation instructions.

Privacy and Custom Document Installation

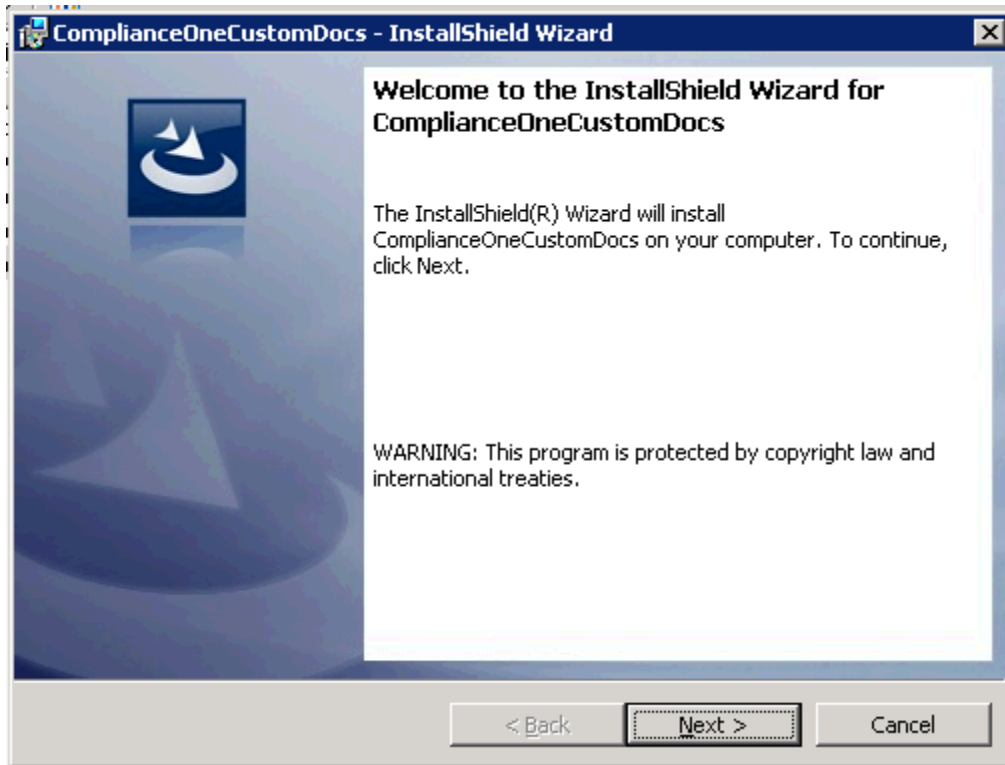
This section provides instructions for installing and configuring Privacy/Custom documents for use with ComplianceOne.

To install a privacy document to your ComplianceOne server, use the following procedure:

1. Place the Privacy or Custom Document CD into the computer hosting your ComplianceOne server and view the CD contents with Windows Explorer.
2. Extract the contents of the .ZIP file

Note: Double-clicking the zip file will open it in a compression utility such as Winzip. If you do not have such a utility, you can right-click on the zip file and choose Explore from the context menu to interact with the contents of the zip file.

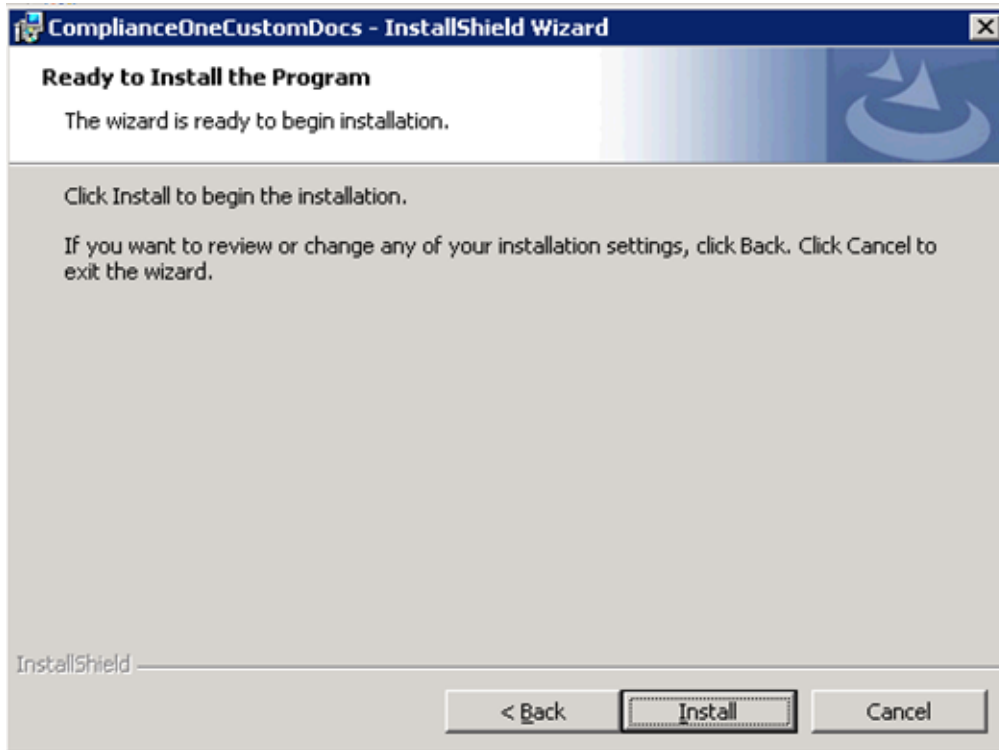
3. Double-click **ComplianceOnePrivacy_xxxxxxx.exe** or **ComplianceOneCustom_xxxxxxx.exe**. The filename placeholders reference the filename of the document (xxxxxxx).



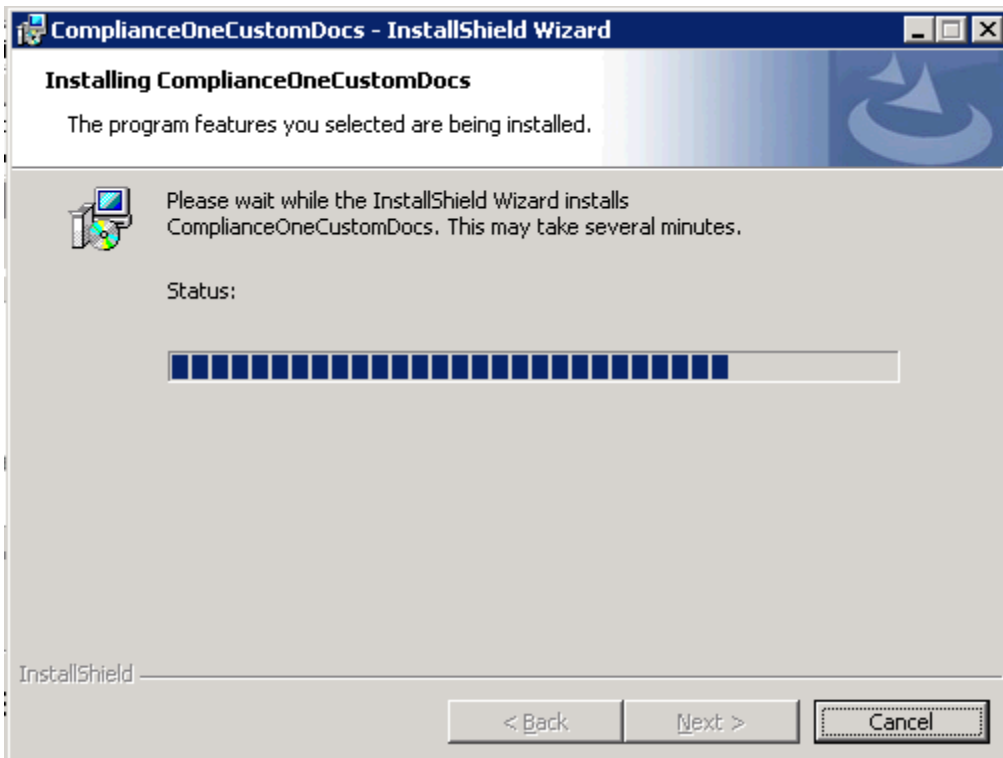
4. The Welcome window will display. Click Next.

Note

The installation program may require a few moments to locate your ComplianceOne installation. When it finds it, you will see the following window.



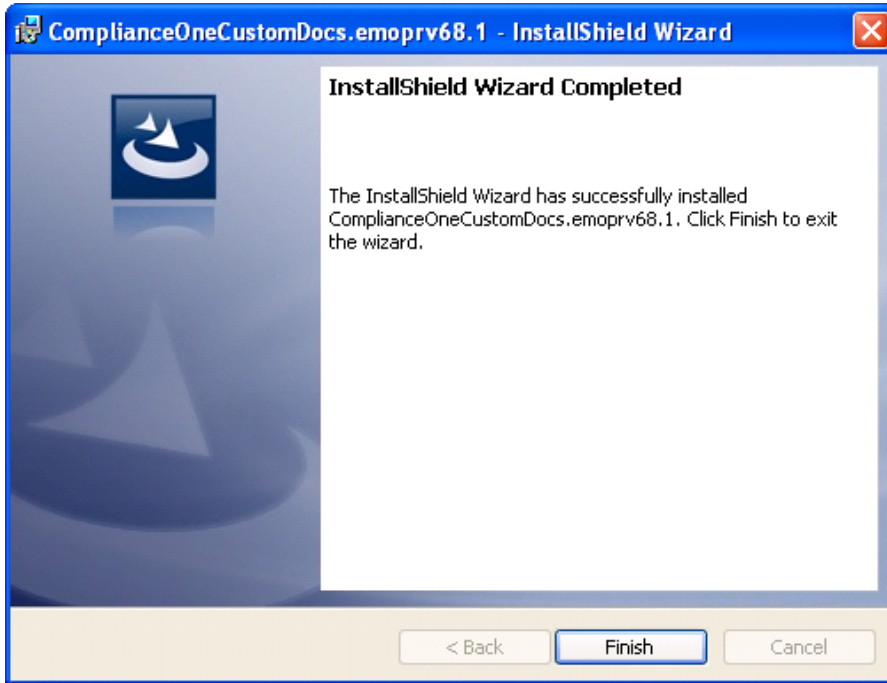
5. Click **Install** to begin the installation. Status information and progress bars will display as the privacy or custom document is being installed.



6. After installation, the Mod administration login page will display, where you are required to log in. Note that you must have system administrator rights in ComplianceOne Administration to log in.



7. Click Continue.



8. The mod will complete and the installation will be completed. Click **Finish**.

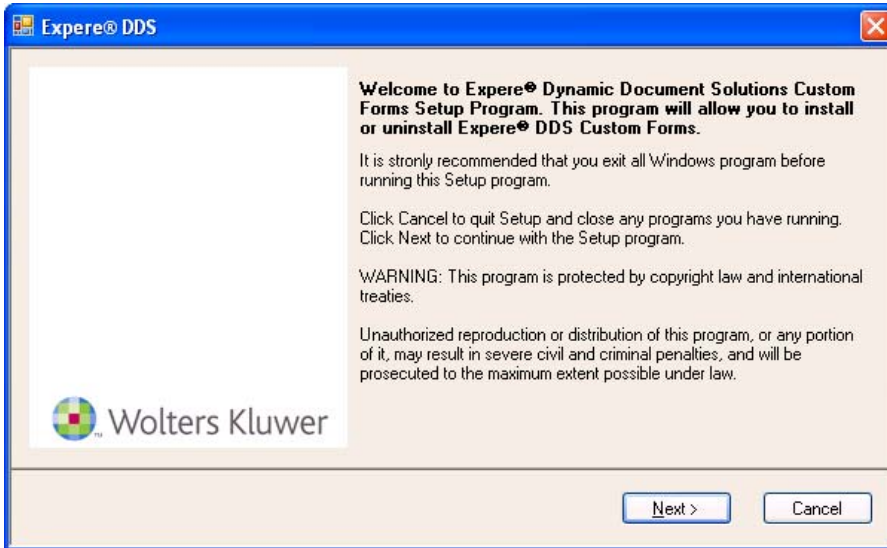
Credit Insurance and Debt Cancellation Document Installation

This section provides instructions for installing and configuring credit insurance and debt cancellation forms for use with ComplianceOne.

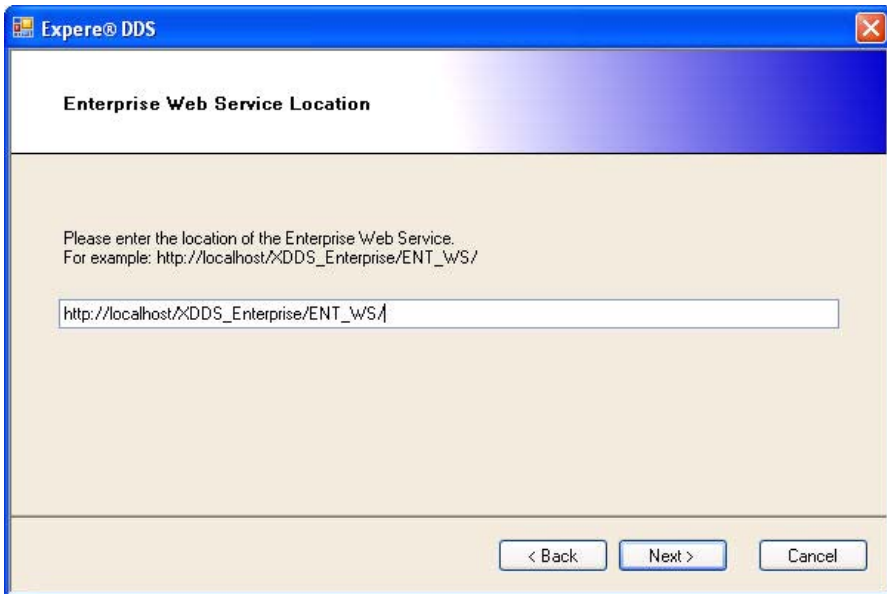
This installation must be performed at the computer hosting the ComplianceOne executable files. For example, in a network environment, perform these steps at your ComplianceOne server.

To begin the installation:

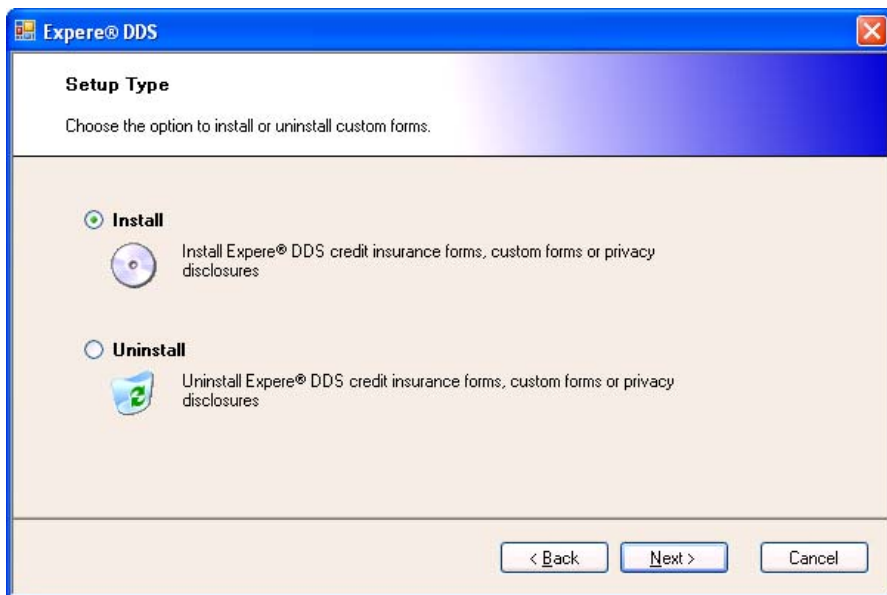
1. Place the Custom Document CD into the computer hosting your ComplianceOne server.
2. Open Windows Explorer and navigate to the CustomForms folder on the CD.
3. Double-click **Setup.exe** to start the installation.



4. Click Next.



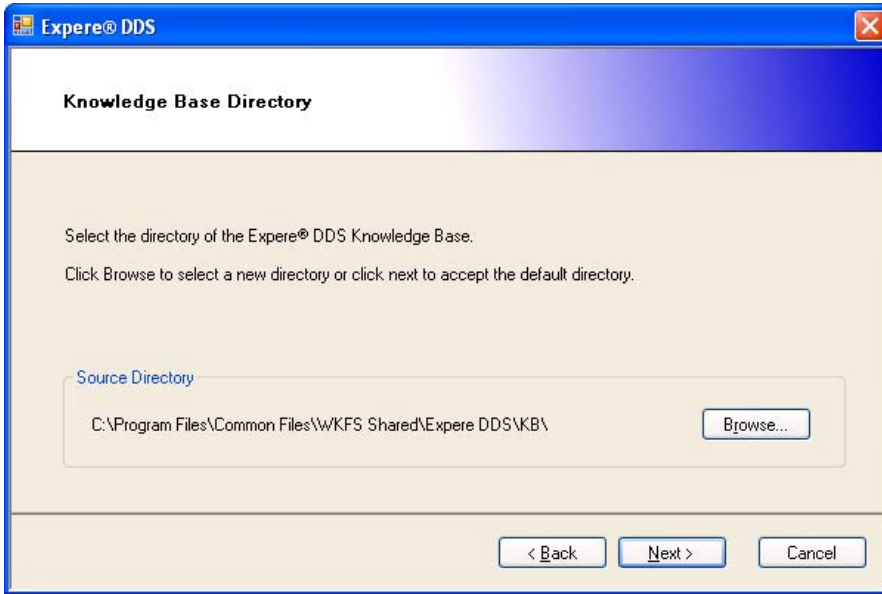
5. The installation program will automatically detect the location of the web services. Click Next to continue.



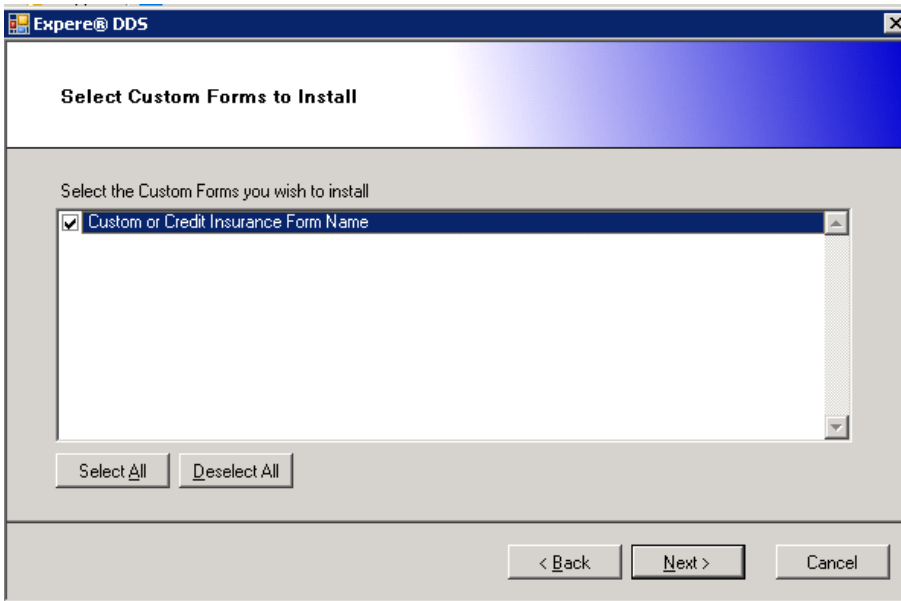
6. Make sure the **Install** option is selected and click **Next**.



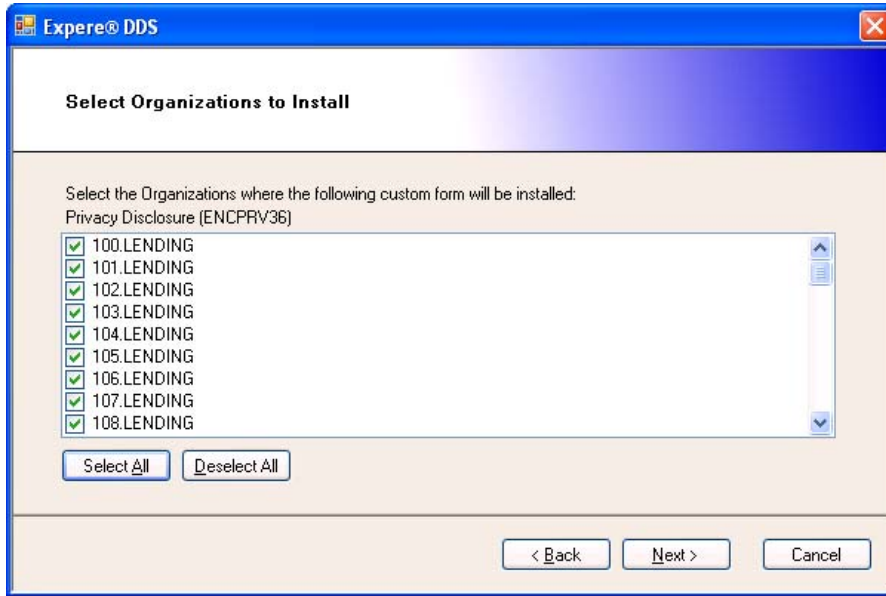
7. Select the custom forms source directory, that is, the location of the custom forms to be installed. This will be your CD-ROM drive. Click **Browse** to navigate to the CustomForms folder on your CD, if necessary. Click **Next**.



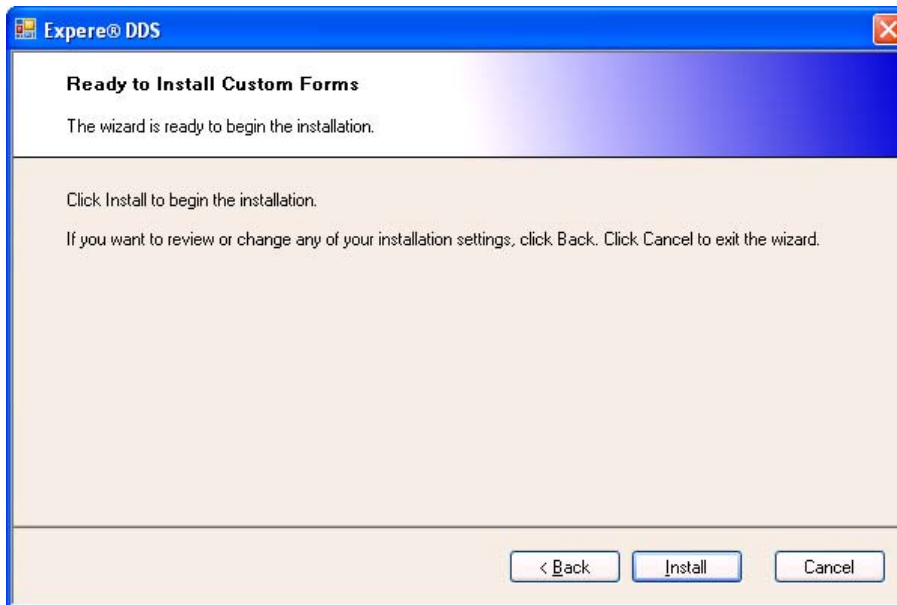
8. The path to the folder containing your Expere DDS Knowledge Base will be listed. Use the Browse button if the folder is incorrect. Click Next.



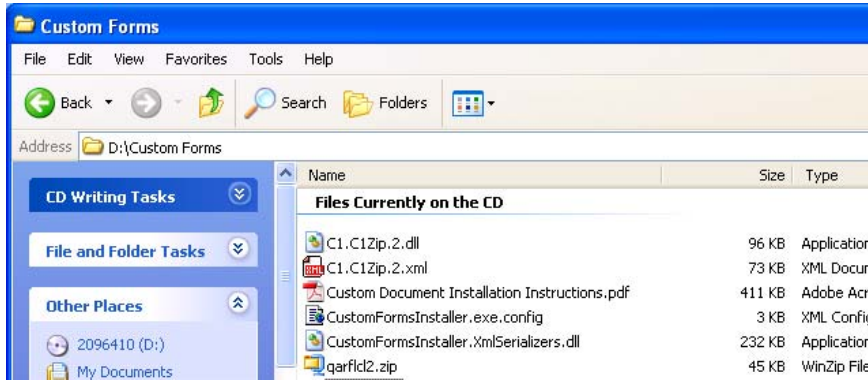
9. The custom form, credit insurance form, or debt cancellation form available on the CD will be listed. Select one or more checkboxes, if available, to choose the forms to install. Click Next.



10. Choose one or more organizations that will use this custom form. You must select at least one. Use **Select All** if you wish to choose all of your organizations. Click **Next**.



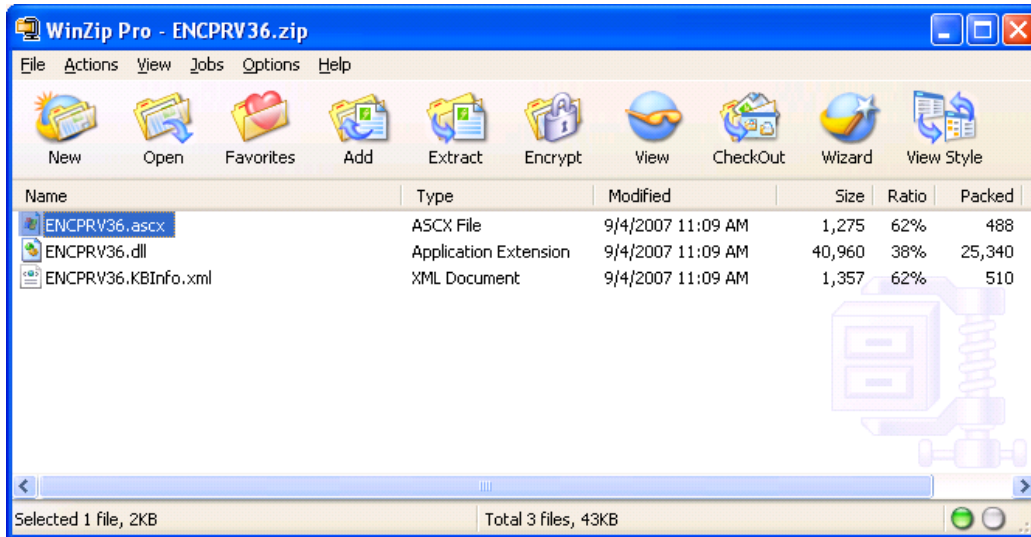
11. Click **Install** to begin the installation. After the installation is complete you will see the Expere DDS Install Wizard Window. Click **Finish** to end the installation.
12. Return to the Windows Explorer view of your Custom Forms Installation CD.



13. You will see a zip file. The filename of the zip file will vary depending on which custom documents you are installing. Double-click on the zip file.

Note: Double-clicking the zip file will open it in a compression utility such as Winzip. If you do not have such a utility, you can right-click on the zip file and choose Explore from the context menu to interact with the contents of the zip file.

14. Select the .ascx file. Again the filename of the ascx file will vary depending on which custom documents you are installing. Extract the file if you are using a compression utility.



15. Otherwise from Windows select the ascx file and copy it.

16. Copy or extract the ascx file to the following location:

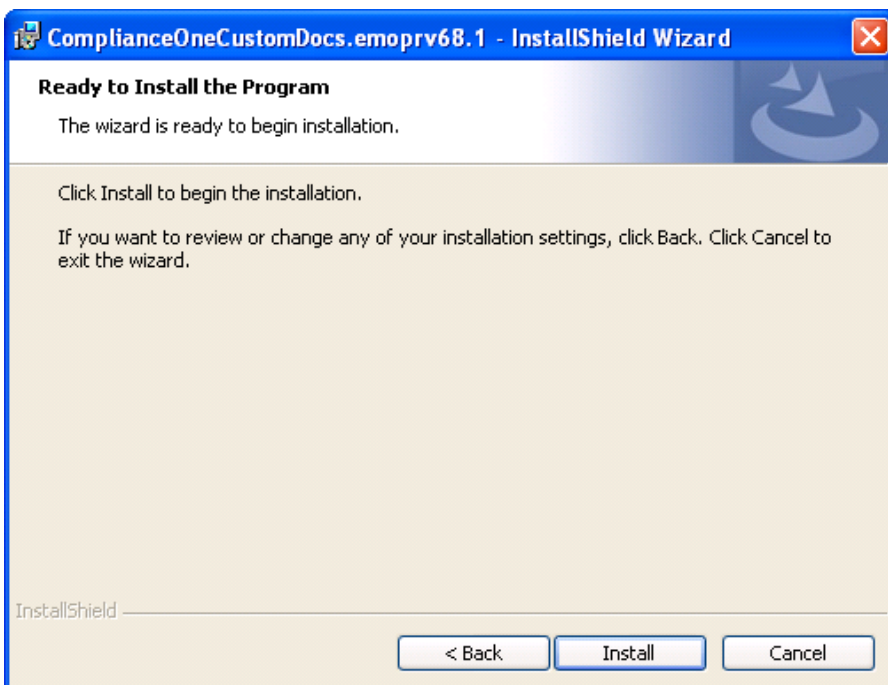
C:\Inetpub\wwwroot\ComplianceOne_Lending\DDC_Controls

17. Return to Windows Explorer.

18. Double-click **ComplianceOneCustomDocs.eSTxxx##.exe** found in the CustomForms folder on your CD. (The filename usually matches the ZIP filename in the Custom Forms folder on the CD.)

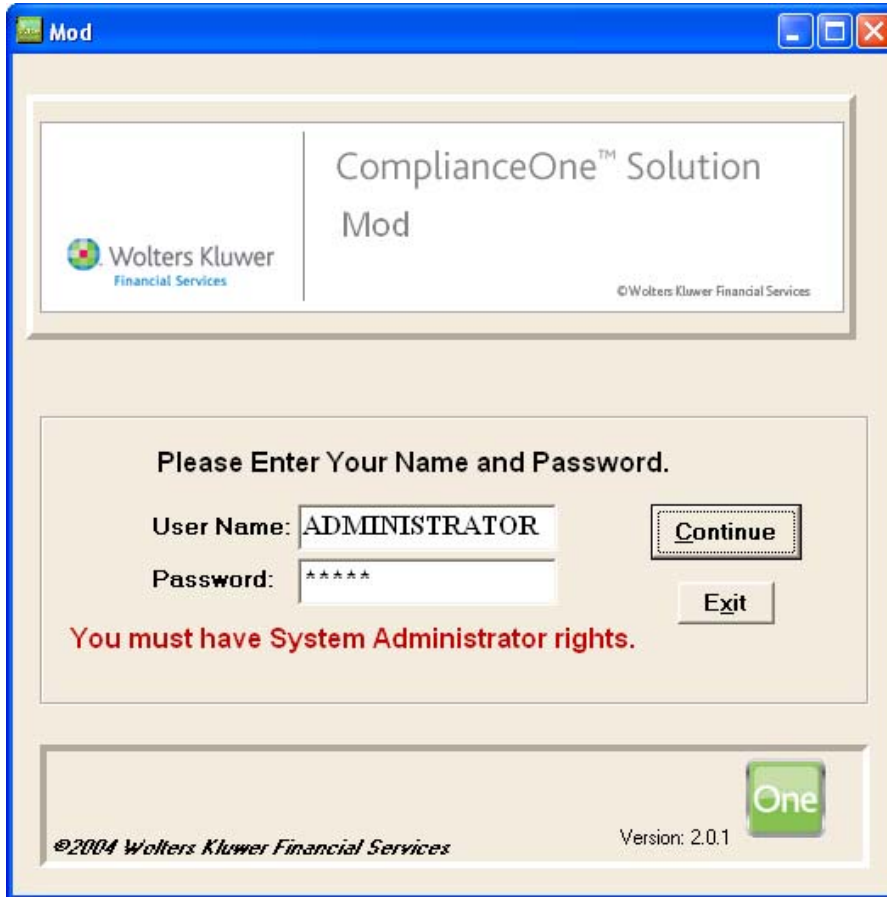
The filename placeholders include the state abbreviation (ST) and a description and version number (xxx##). The Welcome window will display. Click **Next**.

19. The installation program may require a few moments to locate your ComplianceOne installation. When it finds it, you will see the following window.



Attach the Credit Insurance Form

20. Click **Install** to begin the installation. Status information and progress bars will display as the privacy document is being installed.
21. After installation, you will be required to log in to Mod administration. Note that you must have system administrator rights in ComplianceOne Administration to log in.



Mod

ComplianceOne™ Solution
Mod

Wolters Kluwer
Financial Services

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Please Enter Your Name and Password.

User Name: ADMINISTRATOR

Password: *****

Continue

Exit

You must have System Administrator rights.

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22. Click **Continue**.
23. The mod will complete and the installation will be completed. Click **Finish**.

This portion of the credit insurance or debt cancellation document installation is complete. Proceed to the relevant next section to complete the configuration.

Attach the Credit Insurance Form

Credit insurance forms need to be attached to the insurance policy setup in ComplianceOne Administration. To attach your credit insurance form(s):

1. Open ComplianceOne Administration.

2. Click the Lending tab.
3. Click the Insurance option in the Navigator pane on the left.
4. Double-click the desired Policy Name to display details.
5. Review the Credit Insurance Warning screen and click **OK**.
6. Click the Insurance Company option in the Navigator pane.
7. Select the appropriate document from the dropdown for each applicable insurance type in the Insurance Forms area.
8. Click **Save** in the toolbar to save selections.
9. Click **Finish** when you are done to close the policy.
10. Repeat steps 4 through 9 for each applicable insurance policy.

Attach the Debt Cancellation Form

Debt cancellation forms need to be attached to the debt cancellation policy setup in ComplianceOne Administration. To attach your debt cancellation form(s):

1. Open ComplianceOne Administration.
2. Click the Lending tab.
3. Click the Debt Cancellation option in the Navigator pane on the left.
4. Double-click the desired Policy Name to display details.
5. Review the Debt Cancellation Warning screen and click **OK**.
6. Click the Administrative Company option in the Navigator pane.
7. Select the appropriate document from the dropdown for each applicable form type in the Forms area.
8. Click **Save** in the toolbar to save selections.
9. Click **Finish** when you are done to close the policy.
10. Repeat steps 4 through 9 for each applicable debt cancellation policy.

