



# Quick Update Guide for ComplianceOne Client

ComplianceOne® Solution

2015.3  
July 2015

This publication was written for ComplianceOne.

**Publication Information / Version**

ComplianceOne Solution, Release 2015.3  
Quick Update Guide for ComplianceOne Client  
Document Version 10.0, July 2015

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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 3.5, .NET Framework 4, and Silverlight. Only if not installed in your previous update to 2014.4, install the .NET 4.0 patch from <http://support.microsoft.com/kb/2580188/en-us>.
  - 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.
  - Add proxy server/firewall exceptions, if needed. (Refer to Appendix F in the Update Installation Instructions.)
- ☐ Verify the version of ComplianceOne that is currently on the client.
  - This installation program only supports the update of ComplianceOne Release 2015.2 to Release 2015.3
  - 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.
- *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.
- *Other Windows systems:* Double-click **ComplianceOneClientSetup.exe**.

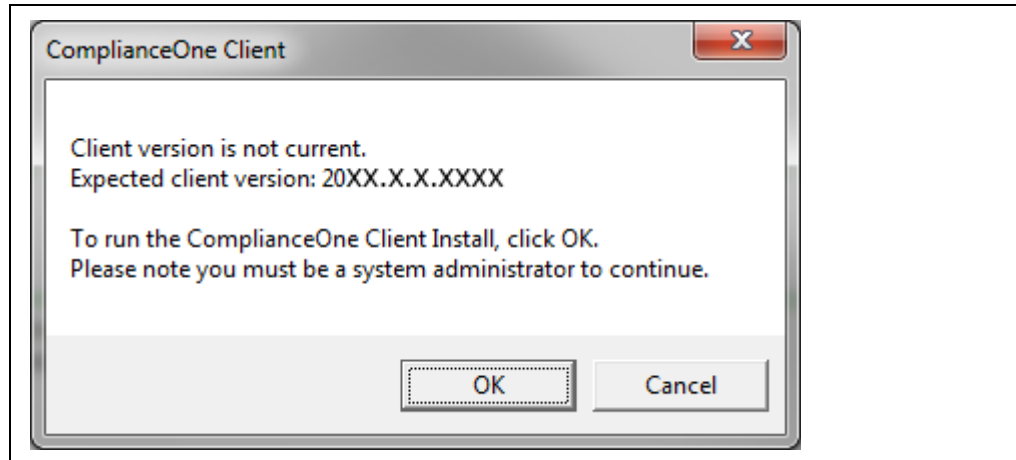
OR

☐ Run Automated Install:

- *Note:* Your server needs to be up to date with the latest version for this to work.
- *If you are a local administrator on the machine, you will be prompted with this option when trying to open ComplianceOne Lending, Mortgage, or Deposit.* Click **OK** to continue, or **Cancel** to exit out of this option.

#### Automatic Update

ComplianceOne includes automatic update functionality for users on client workstations. The program allows the system to automatically update client workstations when the client is out of date. For users with Admin rights, the system will update automatically when a newer version is detected. Users without Admin rights will receive the message but will not be allowed to move forward with the automatic update.



- ☐ 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 **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 **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.

If you are using ComplianceOne with Windows 2008 R2 Terminal Server, a few additional steps are required for client configuration to prevent a known issue from occurring. These steps are detailed in the next section, [Windows 2008 R2 Terminal Server Client DEP Exception Required](#).

- ☐ 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 older systems:* Select **Start > Run...** Type **CMD** and click **OK**.
    - At the command prompt, type: **Change User /Install**. Press **Enter** and close.
  - Run Automated Install:
    - *Note:* Your server needs to be up to date with the latest version for this to work.
    - If you are a local administrator on the machine, you will be prompted with this option when trying to open ComplianceOne Lending, Mortgage, or Deposit. Click **OK** to continue, or **Cancel** to exit out of this option.
- ☐ Proceed with the [Client Update Installation](#).
- ☐ When the installation is complete, restart the server. After the restart Terminal Server will be in Execute mode.

## Windows 2008 R2 Terminal Server Client DEP Exception Required

If you are using ComplianceOne on Windows 2008 R2 Terminal Server, unexpected terminations can occur if an exception in Data Execution Prevention, DEP, is not made. Each terminal server will require these steps to add an exception in DEP for ComplianceOne Lending, Deposit, and Mortgage.

- ☐ Right-click **Computer** from **Start** and select **Properties**.
- ☐ Click the **Advanced system settings** link on the left side.
- ☐ From the **Advanced** tab click the **Settings** button in the **Performance** section.



- ☐ Select the Data Execution Prevention tab.
- ☐ Choose the option to **Turn on DEP for all programs and services except those I select**.
- ☐ Click **Add** and browse to **Loans.exe** to add it to the list. The default path is \\servername\ComplianceOne\Loans.exe.
- ☐ Click **Add** and browse to **Deposits.exe** to add it to the list. The default path is \\servername\ComplianceOne\Deposits.exe.
- ☐ Click **Add** and browse to **Mortgage.exe** (if your financial institution has purchased this ComplianceOne functionality) to add it to the list. The default path is \\servername\ComplianceOne\Mortgage.exe.
- ☐ Click **OK** and close the Computer Properties window.

This is a one-time operation, that is, you do not need to add a DEP exception everytime you upgrade ComplianceOne on your Windows 2008 R2 Terminal Server. You may need to reboot the terminal server for the DEP exceptions to take effect.

## 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, training, or support information at the following location: [Support.WoltersKluwerFS.com](http://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](http://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](mailto: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) 323-4848.

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