



Index Update Instructions

ComplianceOne® Solution

August 2014

About This Document

This document is intended to provide instructions on how to install the monthly index updates for your ComplianceOne software.

This publication was written for ComplianceOne.

Publication Information / Version

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Index Update Instructions

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ComplianceOne Index Update

Overview

Index History Update

Wolters Kluwer Financial Services provides updates for the variable rate index histories used in ComplianceOne. This download, once installed, will update the index histories with the most current rates available as of the month and year indicated on the filename.

Please note that we update the rates as they become available to use. Some rates are published only on a quarterly basis.

Supported Indexes

- 6 Month LIBOR Index - WSJ
- 26-Week T-Bill Rate
- 1 Year LIBOR Index - WSJ
- 1-Year Treasury Index
- 3-Year Treasury Index
- 5-Year Treasury Index
- 10-Year Treasury Index
- 11th District FHLB Cost of Funds
- JP Morgan Chase Bank Prime
- National Average Contract Rate
- Wall Street Journal U.S. Prime Rate

Obtaining the Index Update

The installation file is available for download from our Software Support website.

1. Go to the Software Support website at <http://support.wolterskluwerfs.com>.
2. In the upper right corner, select **Log In**.
3. Enter your **User Name** and **Password**.
 - If you do not already have a User Name and Password, select Register and complete the requested information.
 - You will need your Wolters Kluwer Financial Services customer number to register. If you do not know your customer number, contact our Customer Support at (800) 552-9410 between 7:00am - 7:00pm (Central).
4. Select **Downloads**.

5. Select **ComplianceOne**.
6. Locate and select the link to the **ComplianceOneIndexUpdate_Month_Year.exe** file.
7. When prompted, select **Save** and save the file to your **Desktop**.
8. If you receive a Security Warning screen, click More Info for information on this warning or click **YES** to continue.
9. After the download is complete, navigate to your Desktop and double-click to run the **ComplianceOneIndexUpdate_Month_Year.exe**.
10. Follow the instructions below to complete the installation.

Installation Instructions

Note

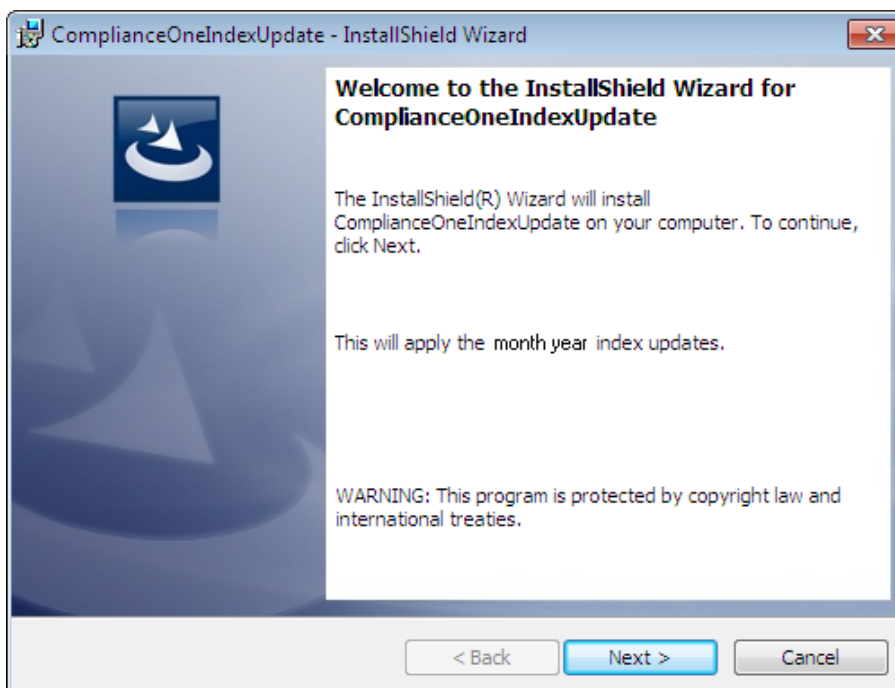
This update must be run on the application server where the ComplianceOne executables are installed.

Also, verify you have administrative rights to the location where the ComplianceOne application is installed. If you are unsure of whether or not you have appropriate rights, contact your network administrator or technical consultant.

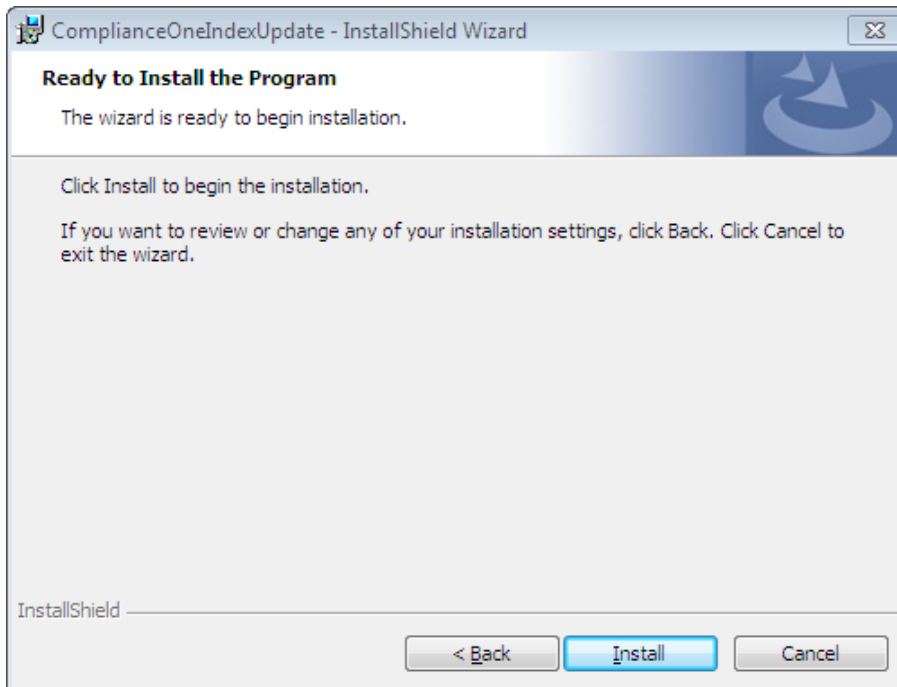
Important

If you have file replication enabled on your ComplianceOne server(s), you will need to disable the file replication before performing the index update. Once the update has successfully completed, you can re-enable file replication.

1. Exit ComplianceOne and verify that all users have exited out of the program.
2. Navigate to the Desktop and double-click the index history update file to begin the installation.
3. The Welcome page displays. Review the message displayed, and click **Next** to continue.



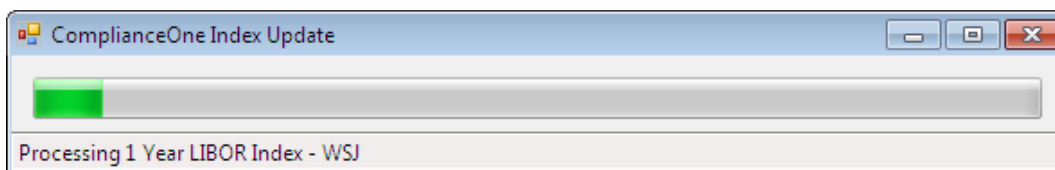
4. On the Ready to Install the Program page, click **Install** to begin the installation.



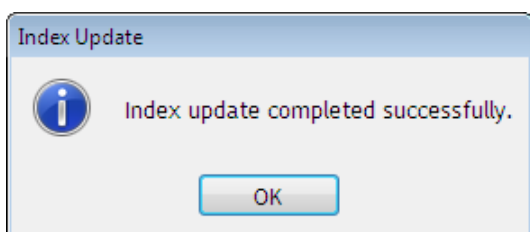
5. On the ComplianceOne Index Update Program page, click **Continue**.



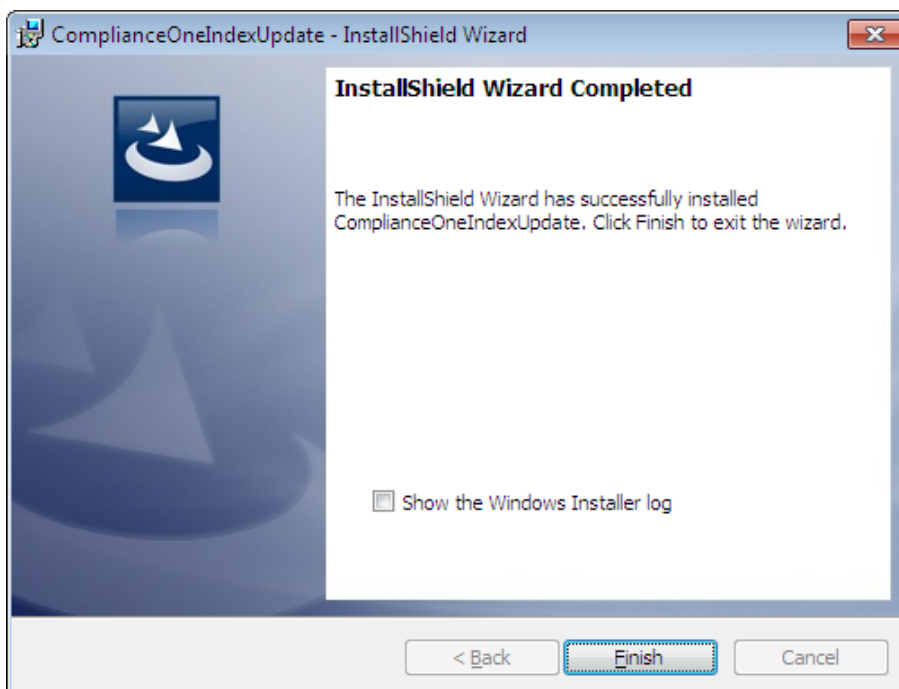
6. A progress bar displays as the files are copied to the ComplianceOne installation.



7. A confirmation window displays when the files copy has completed. Click **OK**.



8. On the InstallShield Wizard Completed page, click **Finish** to close the installation.



What's Next?

We will continue to provide monthly index updates on our website. Please note that we update the rates as they become available to us; some rates are only published on a quarterly basis.

How to Contact Us

There may be situations where you provide or are asked to provide data to Wolters Kluwer Financial Services for assistance in troubleshooting, implementation, or the delivery of professional services. When doing so, do not provide actual live data of your customers. Provide sample, fake data that is representative of the issue you are experiencing.

Software Notification Service Now Available

Customers who subscribe to the Software Notification Service will receive notifications for many of our software products when updates are made available on our Software Support Web site at <http://Support.WoltersKluwerFS.com>

To subscribe to this service, visit <http://Alerts.WoltersKluwerFS.com> and enter your valid e-mail address. A link to your personal profile page is then e-mailed to you allowing you to specify your profile information and subscription preferences.

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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

Internet

Also you can visit us on the Internet at www.wolterskluwerfs.com.

E-Mail

E-mail questions or issues to: ComplianceOneSupport@WoltersKluwer.com

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) 323-4848.

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