

Install Document Explorer 3.8.1 on the Workstations (if using Document Explorer and NOT Email Management)

1. If an older version of ProSystem fx Document Explorer or the Document Drive is installed, go to Start > Control Panel > Add/Remove Programs (or Programs and Features if using Vista) and remove it
2. If using a 32 bit workstation, download the file "ProSystem fx Document Explorer 3.8.1.zip." This file is listed under Document Explorer > Version 3.8.1 32 bit on the ProSystem fx Document Updates site (<http://support.cch.com/updates/Document>)
3. If using a 64 bit workstation, download the file "ProSystem fx Document Explorer 3.8.1.zip (x64).zip." This file is listed under Document Explorer > Version 3.8.1 64 bit on the ProSystem fx Document Updates site (<http://support.cch.com/updates/Document>)
4. Extract the zip file to a location on the workstation, and double click on Setup.exe
5. The installer will prompt you to install any prerequisites that are not already installed
6. You may have to reboot your computer after installing some of the prerequisites. Run Setup.exe again after rebooting your computer if the installation does not continue after installing the prerequisites
7. Click Next, accept the license agreement, then click Next again
8. Enter the name of your Document server or website (do not enter http:// or /document, only the server or website name) and click Next
9. Click on Browse to change the install location if you would like to install to a location other than the default
10. Click on "Just me" if you would like to install the application only for the user that is currently logged in
11. Click on Next, then Next again to start the installation
12. After the installation completes, click on Close and then reboot the workstation
13. After logging back into the workstation, the ProSystem fx Document Client Service should start in the system tray. Right click on the Client Service icon, select Login and enter credentials if prompted
14. Go to Start > Programs > CCH Incorporated > ProSystem fx Document > ProSystem fx Document Explorer to launch the application
15. The first time you launch the application, you will see a client synchronization occur that may take several minutes depending on how many clients you have in the system. After this completes you should be able to start using Document Explorer.