

Installation Guide

May 2014

Welcome to CCH Coolbar!

CCH, a Wolters Kluwer business, welcomes you to CCH Coolbar.

The Installation Guide details the installation instructions and setup information for CCH Coolbar. Please refer to the Table of Contents to locate the step-by-step installation instructions.

It is our commitment and goal to continue to improve the overall value of the products and services we provide. If we can be of assistance to you, please let us know. You can reach us at **1-800-PFX-9998**.

Table of Contents

CCH Coolbar Installation and Setup Instructions.....	2
FIRM Setup: Set global CCH Coolbar options for your firm	
Step 1: Install ProSystem <i>fx</i> Practice Management version 2009.90.01 or higher on the server.....	2
Step 2: Run versiondb.exe and select the CCH Coolbar global setup options for the firm	2
Step 3: Set security options for firm employees who will use CCH Coolbar	11
Step 4: Activate employees in ProSystem <i>fx</i> Practice Management for CCH Coolbar.....	12
WORKSTATION Setup: Install CCH Coolbar components on designated workstations	
Step 1: Set up individual workstations for CCH Coolbar	13
Step 2: Start CCH Coolbar in Outlook	15
Support.....	17

CCH Coolbar Installation and Setup Instructions

Installing and setting up the CCH Coolbar add-on to ProSystem *fx* Practice Management includes setting up global firm information and then installing CCH Coolbar components on employee workstations.

FIRM Setup: Set global CCH Coolbar options for your firm.

1. Install ProSystem *fx* Practice Management version 2009.90.01 or higher on the server.
2. Run versiondb.exe and select the CCH Coolbar global setup options for the firm.
3. Set security options in ProSystem *fx* Practice Management for firm employees who will use CCH Coolbar.
4. Activate employees in ProSystem *fx* Practice Management for CCH Coolbar.

WORKSTATION Setup: Install CCH Coolbar components on designated workstations.

1. Set up individual workstations.
2. Start CCH Coolbar in Outlook.

Note: CCH Coolbar honors the ProSystem *fx* Practice Management security established for the firm employees (**Administration/Firm/Security Setup**). For example, if an employee does not have Contact Management/Client AR privileges, A/R review features will be disabled in the Client Details section of the CCH Coolbar DataCenter. Not having security for the Clients tab in Reports disables A/R review in the Finance section of the DataCenter. CCH Coolbar does not honor client trims from ProSystem *fx* Practice Management. If your firm uses ProSystem *fx* Practice Management client trims, they will not be available in CCH Coolbar.

CCH Coolbar FIRM Setup: Set global options for your firm

Step 1: Install ProSystem *fx* Practice Management version 2009.90.01 or higher on the server

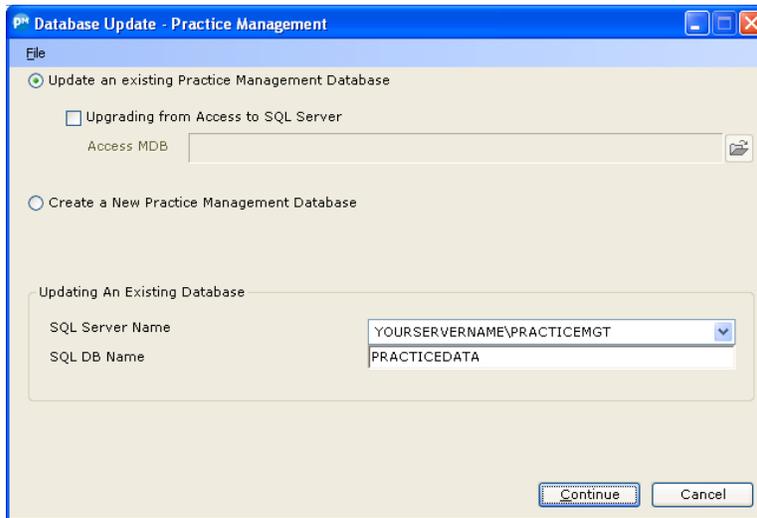
To use the CCH Coolbar add-on, install ProSystem *fx* Practice Management 2009.90.01 or higher on the server. See the Release Bulletin or Installation Guide for details on installing.

Step 2: Run versiondb.exe and select the CCH Coolbar global setup options for the firm.

Set up the CCH Coolbar options for the firm. Database and folder options you set up here will be GLOBAL defaults for all firm employees who are activated to use CCH Coolbar.

To run versiondb.exe

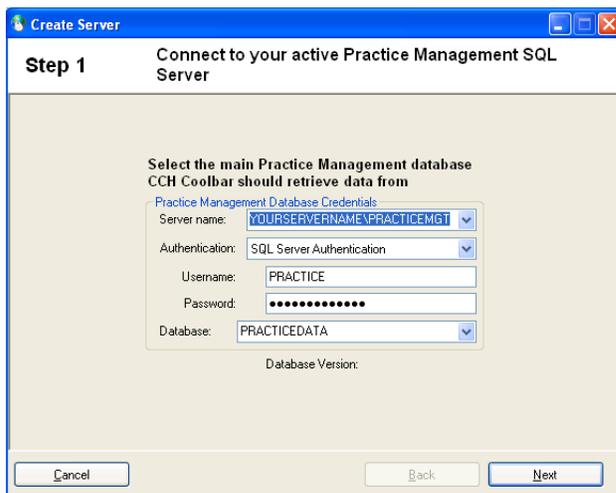
1. Select **Run** on the **Start** menu. Browse to your **cpas\vpms\updates** directory (on the server where ProSystem fx Practice Management was installed). Select **versiondb.exe** to set up the new database for CCH Coolbar and set folder defaults. Click **Open**. Click **OK**.



2. Click the **File** menu to display the CCH Coolbar setup options: **CCH Coolbar Data Creator** and **CCH Coolbar Folder Setup**.

To run the CCH Coolbar Data Creator

1. Select CCH Coolbar Data Creator from the **File** menu in **versiondb.exe**.



2. On this first window, connect to your active ProSystem *fx* Practice Management SQL Server. Your ProSystem *fx* Practice Management Database Credentials default from the pmnet.ini file.

Server name: This is the **SQL Server Name** entered when installing ProSystem *fx* Practice Management. We recommend that you accept this default from the pmnet.ini file.

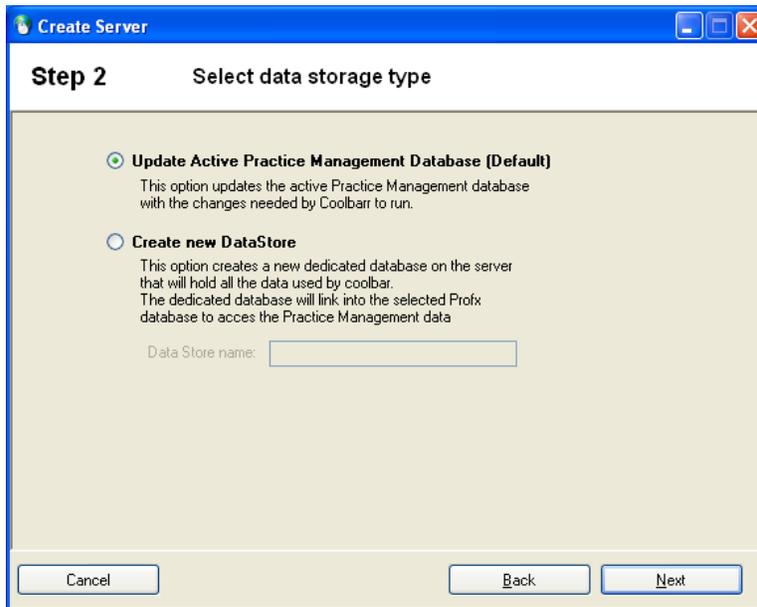
Authentication: **SQL Server Authentication** defaults. We recommend that you accept this default.

Username: Accept the default for **Username**.

Password: Accept the default for **Password**.

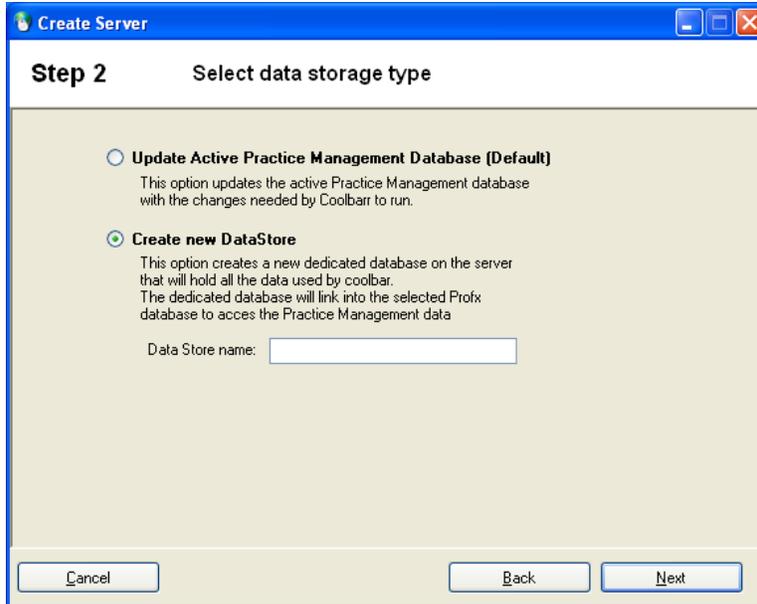
Database: This is the **SQL DB Name** entered when installing ProSystem *fx* Practice Management. We recommend that you accept the default from the pmnet.ini file.

3. Click **Next** to continue.
4. In Step 2, select the data storage type.

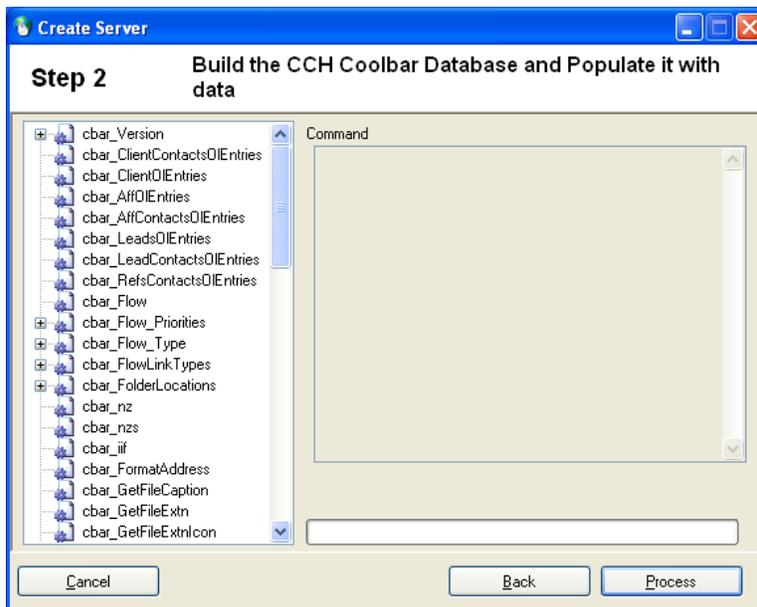


5. **Update Active Practice Management Database (Default)** is selected by default. This selection updates the active ProSystem *fx* Practice Management database (selected in Step 1) to run with CCH Coolbar. We recommend that you accept the default.

- If you do not want to update the active database, select **Create new DataStore** and enter the new dedicated database name. This option should only be used if your firm has a large WAN with multiple databases.



- Click **Next** to continue.
- Use the final window to build the CCH Coolbar database.



- Click **Process** to complete this step. A list of commands displays on the window as the CCH Coolbar database is created from information in your ProSystem fx Practice Management database.

To run the CCH Coolbar Folder Setup

1. Now return to the **File** menu in **versiondb.exe** and select **CCH Coolbar Folder Setup**.



2. Your ProSystem *fx* Practice Management Database Credentials default again from the pmnet.ini file.

Server name: This is the **SQL Server Name** entered when installing ProSystem *fx* Practice Management. We recommend that you accept this default from the pmnet.ini file.

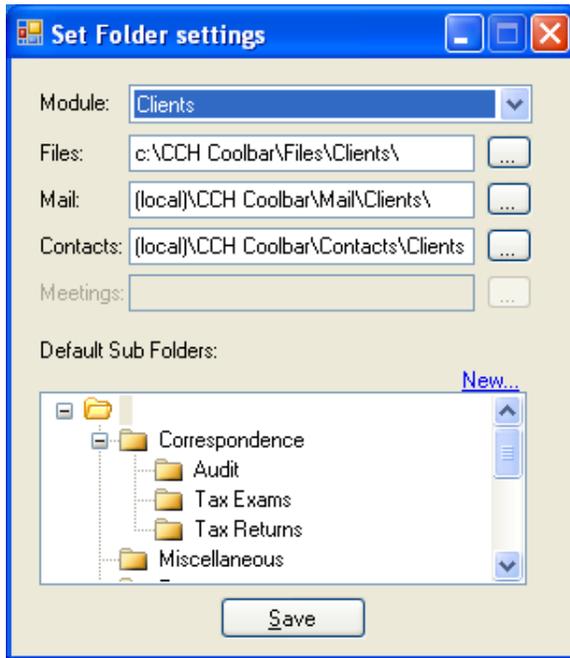
Authentication: **SQL Server Authentication** defaults. We recommend that you accept this default.

Username: Accept the default for **Username**.

Password: Accept the default for **Password**.

Database: This is the **SQL DB Name** entered when installing ProSystem *fx* Practice Management. We recommend that you accept the default from the pmnet.ini file.

3. Click **Login**.



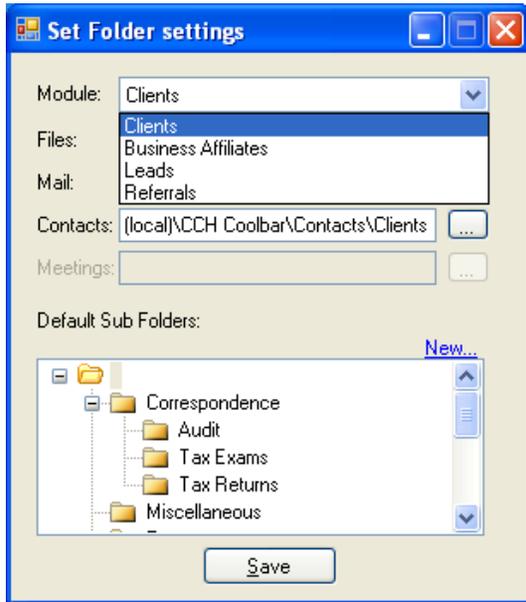
4. All CCH Coolbar folder settings are stored locally on your workstation. This is a GLOBAL setting which will be mirrored for all firm employees activated to use CCH Coolbar.
5. CCH Coolbar contains information for four modules: ProSystem *fx* Practice Management Clients, Business Affiliates, Leads, and Referrals. The first folder setting displays for the Clients module.
6. Select the folder where you want to store file attachments (**Files**) and incoming and outgoing linked emails (**Mail**). In Step 4 you can decide whether or not you want to enable email storage in CCH Coolbar for the firm.
7. Select the folder where you want to store links to ProSystem *fx* Practice Management Clients and Client Contacts (**Contacts**) in CCH Coolbar.
8. If you want to create a new subfolder in the path, select the folder (where you want to add the new subfolder) in the list of Default Subfolders.

Click the **New** link and enter the name of the subfolder to add. Then click **OK** to return to the Set Folder Settings window.

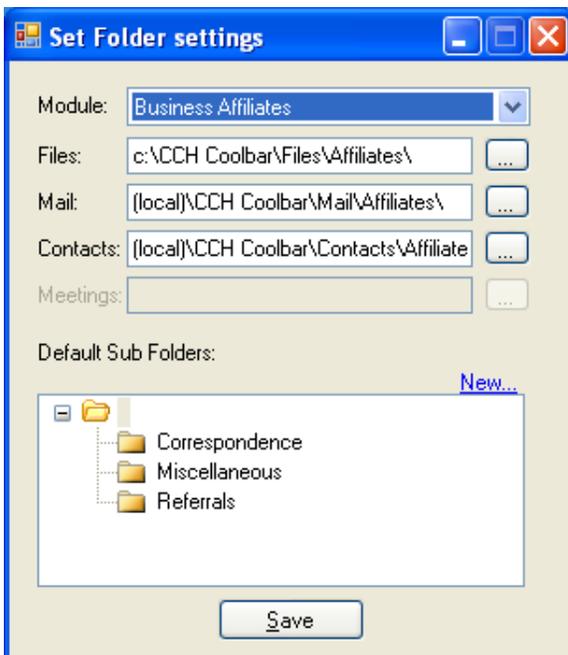


9. Click **Save** to save the settings for the Clients module.

10. Click the Module drop-down to display the full list of modules.



11. Select each of the remaining modules, starting with **Business Affiliates**.

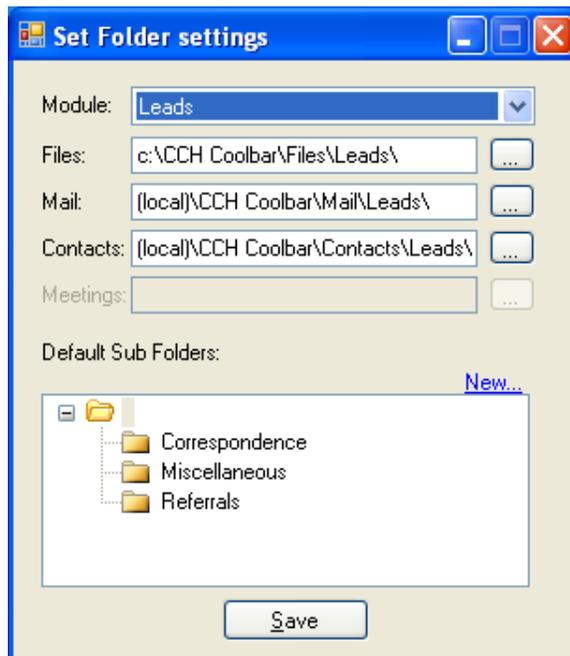


12. Select the folder where you want to store file attachments (**Files**) and incoming and outgoing linked emails (**Mail**). In Step 4 you can decide whether or not you want to enable email storage in CCH Coolbar for the firm.

13. Select the folder where you want to store links to ProSystem *fx* Practice Management Business Affiliates and Business Affiliate Contacts (**Contacts**) in CCH Coolbar.
14. If you want to create a new subfolder in the path, select the folder (where you want to add the new subfolder) in the list of Default Subfolders.

Click the **New** link and enter the name of the subfolder to add. Then click **OK** to return to the Set Folder Settings window.

15. Click **Save** to save the settings for the Business Affiliates module.
16. Click the Module drop-down again and select **Leads**.

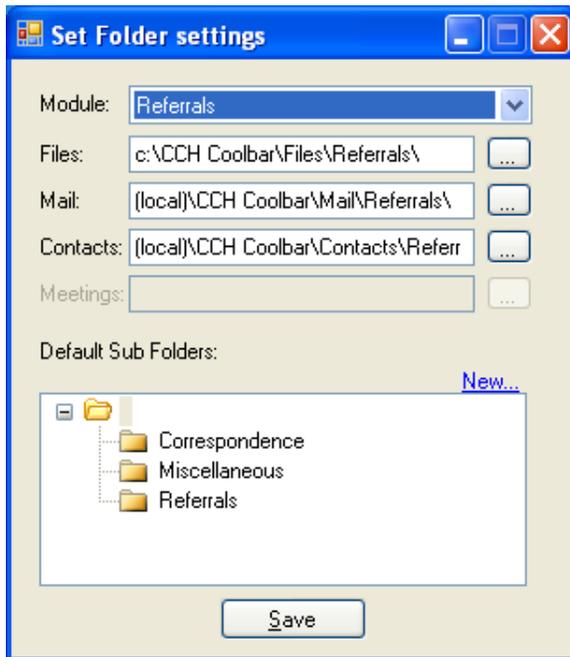


17. Select the folder where you want to store file attachments (**Files**) and incoming and outgoing linked emails (**Mail**). In Step 4 you can decide whether or not you want to enable email storage in CCH Coolbar for the firm.
18. Select the folder where you want to store links to ProSystem *fx* Practice Management Leads and Lead Contacts (**Contacts**) in CCH Coolbar.
19. If you want to create a new subfolder in the path, select the folder (where you want to add the new subfolder) in the list of Default Subfolders.

Click the **New** link and enter the name of the subfolder to add. Then click **OK** to return to the Set Folder Settings window.

20. Click **Save** to save the settings for the Leads module.

21. Click the Module drop-down again and select **Referrals**.



22. Select the folder where you want to store file attachments (**Files**) and incoming and outgoing linked emails (**Mail**). In Step 4 you can decide whether or not you want to enable email storage in CCH Coolbar for the firm.
23. Select the folder where you want to store links to ProSystem *fx* Practice Management Referrals (**Contacts**) in CCH Coolbar.
24. If you want to create a new subfolder in the path, select the folder (where you want to add the new subfolder) in the list of Default Subfolders.

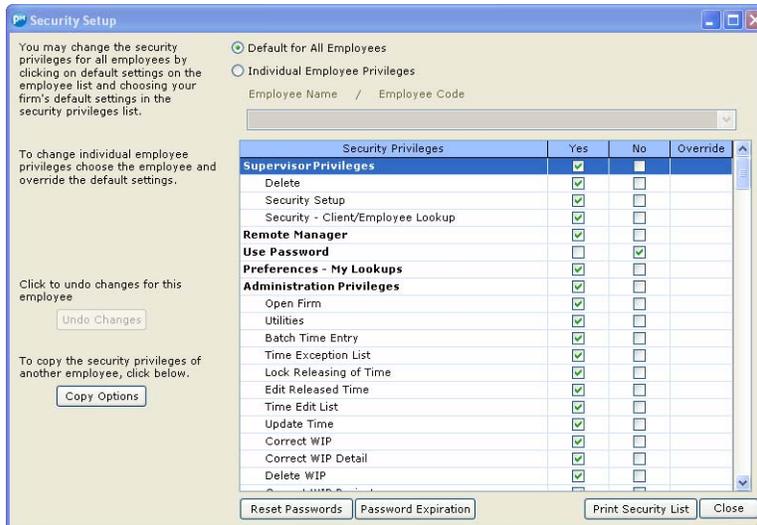
Click the **New** link and enter the name of the subfolder to add. Then click **OK** to return to the Set Folder Settings window.

25. Click **Save** to save the settings for the Referrals module.
26. Once you have completed the CCH Coolbar setup and have returned to the **versiondb** window, click **Cancel**. It is not necessary to click the **Continue** button and update the database if the firm is already running the latest version.

Step 3: Set security options for firm employees who will use CCH Coolbar

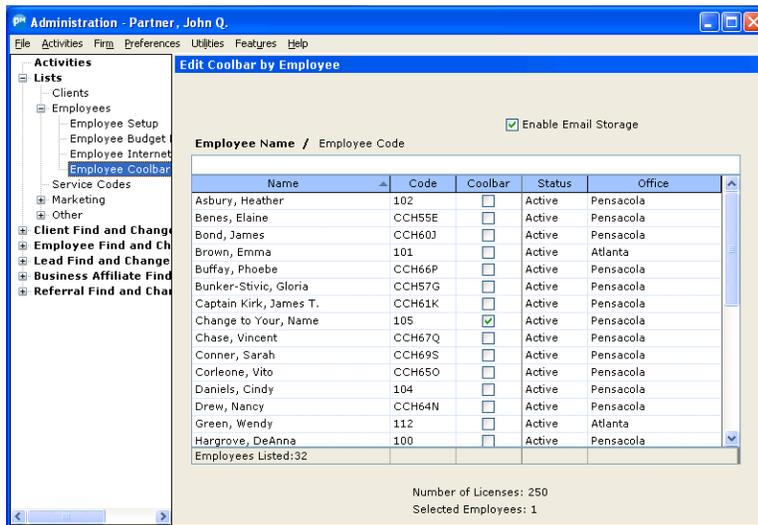
Once you have completed Steps 1 and 2, open ProSystem fx Practice Management to complete the setup and activate the firm employees who will use CCH Coolbar.

1. Open ProSystem fx Practice Management and select **Administration**.
2. Select **Security Setup** from the **Firm** menu in **Administration**.



3. Select to change security for all employees, or select each firm employee who will be using the CCH Coolbar add-on.
4. Scroll through the **Administration Privileges** section of the security list to the **Employee – CCH Coolbar Setup option** check box. By default, this option is set to **No**. Select the **Yes** check box to activate the **Employee Coolbar Setup** option on the navigation bar in Administration. You will use this option in the next step to grant access to specific employees for CCH Coolbar.
5. Click **Close** and continue to Step 4.

Step 4: Activate employees in ProSystem *fx* Practice Management for CCH Coolbar



Use this window in ProSystem *fx* Practice Management (**Administration**) to give firm employees rights to access the CCH Coolbar add-on. You can also select to enable email storage in CCH Coolbar.

1. In Administration, select **Employee Coolbar Setup** on the navigation bar under **Employees**.
2. The list displays the employee name, employee code, status, and office. Click any column heading to sort the list by that column.
3. Select the check box for the employees who will have access to CCH Coolbar. The number of licenses and the number of selected employees displays for reference.
4. Decide if you want to enable email storage within CCH Coolbar, linking emails and attachments to Practice Management clients, business affiliates, leads, and referrals. This is a firm-wide decision. To enable email storage, click the **Enable Email Storage** check box. You can always return here to enable this feature (or turn it off). If you select to enable email storage, additional email options display on the CCH Coolbar.
5. Once you've selected all employees, and decided whether to enable email storage, click the [X] in the upper-right corner to close the window and save your selections.
6. You have now finished setting up CCH Coolbar for your firm.

CCH Coolbar WORKSTATION Setup: Install CCH Coolbar components on designated workstations

Step 1: Set up individual workstations

If you have not already selected to install CCH Coolbar components in Workstation Setup, follow these instructions for each workstation on which you will run CCH Coolbar.

If you add workstations and plan to use CCH Coolbar on them, remember to run Workstation Setup on these new workstations as well.

If you have already run Workstation Setup and selected to install CCH Coolbar components at that time (for each workstation using this add-on), skip this step.

1. Shut down everything that is running on the workstation, and exit all applications.

Select **Run** from the **Start** menu. Click **Browse** and select the drive where the application was installed (for example, **f:\cpas\setup\vpm**).

Select **setup.exe** and click **Open**. Then click **OK** on the Run window.

2. The Install ProSystem fx Practice Management Workstation window appears. Select **Install ProSystem fx Practice Management Workstation**.



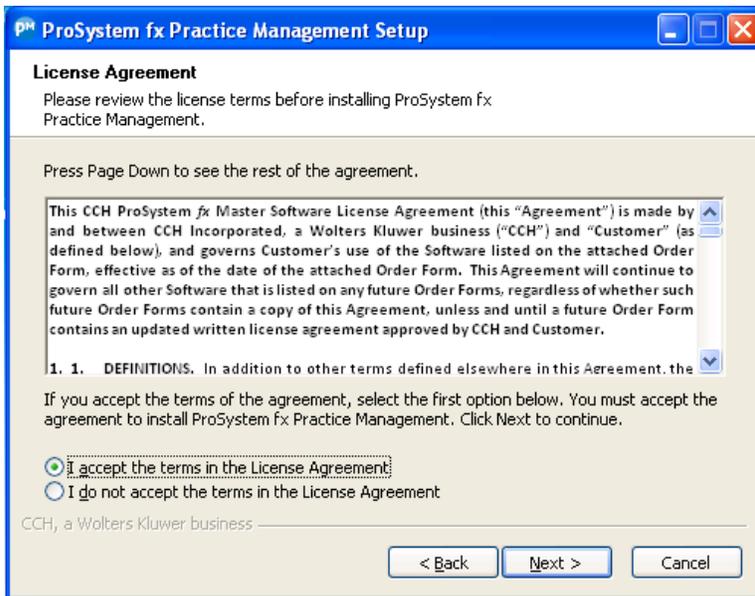
3. The Wizard checks the workstation to see if all requirements are met prior to installing.

If all requirements have been met, this step is skipped and the Install window displays.

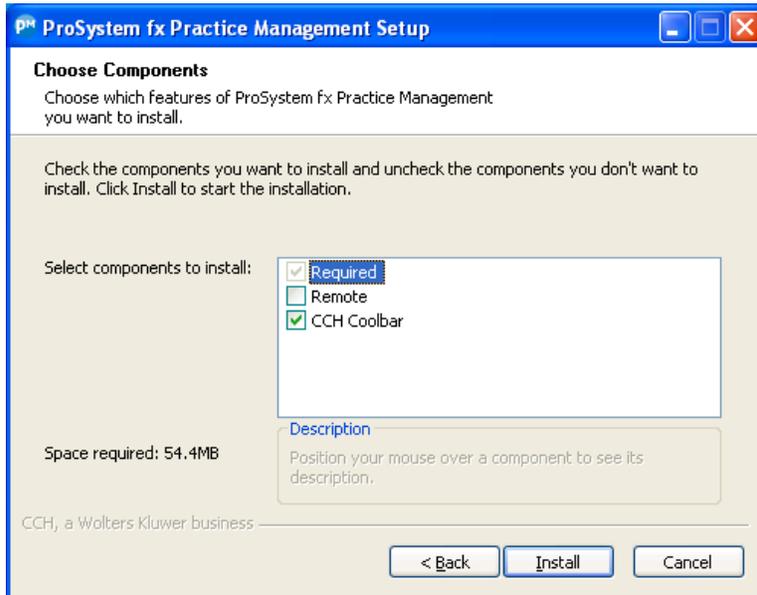
If any requirements are not found, a window displays, listing the requirements and their status.

Click **OK** to install the requirements prior to running Workstation Setup. Follow the on-screen instructions provided by Microsoft to install the requirements on this workstation. When you have finished, the workstation will automatically reboot if needed. If you do not return to the ProSystem *fx* Practice Management setup window again, select **setup.exe** again from the ... \cpas\setup\vpw directory on the drive where ProSystem *fx* Practice Management was installed. Then select **Install ProSystem *fx* Practice Management Workstation**.

4. The ProSystem *fx* Practice Management Setup Wizard window appears. Click **Next**.
5. The License Agreement displays. Select “I accept” and click **Next**.



6. The Choose Components window displays.



Required components always install. This feature requires 50 MB on the workstation's hard drive.

Select **Remote** if your workstation (PC or notebook) will be carried out in the field or if you plan to run both in-house and in the field. If you are not sure, do not select the **Remote** check box. You can add this feature later by running Workstation Setup again and choosing the option, but you cannot remove it once it has been chosen. This feature requires an additional 375 MB of space on the workstation's hard drive.

If your firm is licensed for CCH Coolbar, the **CCH Coolbar** check box will be enabled. Select this check box if you plan to use CCH Coolbar as a ProSystem *fx* Practice Management add-on on this workstation.

Make your selections and click **Install** to start Workstation Setup.

7. The Installing window displays.
8. A progress bar shows that the workstation is being configured.

A message displays when Workstation Setup is complete.

Click **Close** to complete Workstation Setup.

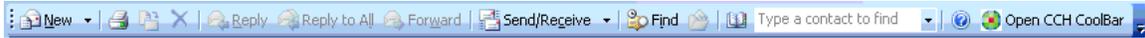
Remember to choose the CCH Coolbar component in Workstation Setup on each workstation that uses this add-on.

9. Now you are ready to open CCH Coolbar on the workstation.

Step 2: Start CCH Coolbar

1. Open Microsoft® Outlook on any workstation with CCH Coolbar installed.

2. An **Open CCH Coolbar** button displays in the standard Microsoft Outlook toolbar. If the Standard toolbar is not enabled, you will not see the **Open CCH Coolbar** option, so make sure the toolbar is enabled.



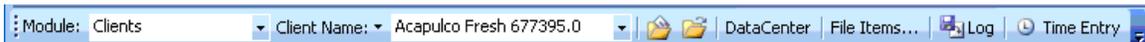
3. Click Open CCH Coolbar.
4. Enter the same **User name** and **Password** you use when logging into ProSystem *fx* Practice Management. Remember that before a firm employee can log in to CCH Coolbar, they must have been activated for CCH Coolbar on the **Edit Coolbar by Employee** window in ProSystem *fx* Practice Management (See FIRM Setup: Step 4).



5. If you want CCH Coolbar to remember your user name and password, select the **Remember Credentials** check box.

If you select the **Settings** link, the **Connect to Database** window displays. Use this window to accept the credentials this workstation will use to connect to the ProSystem *fx* Practice Management database. This window is similar to the **CCH Coolbar Data Creator** window in setup and defaults from the pmnet.ini file.

6. Click **OK** to open CCH Coolbar.
7. The CCH Coolbar opens in Outlook below the Standard toolbar.



From CCH Coolbar you can change the module (Clients, Business Affiliates, Leads, or Referrals), change the contact, use the DataCenter, or enter Time for ProSystem *fx* Practice Management, as well as using many other features and options. Click a button on the CCH Coolbar to open that feature.

8. See the CCH Coolbar Help for complete information when learning how to use CCH Coolbar. The Help system is available from the **Help** menu. To begin, see the **Getting Started with CCH Coolbar** topic available in the Help system.

Support

Call **1-800-PFX-9998**. Support is available Monday through Friday, 8:00 A.M. to 7:00 P.M. Central Time. Extended hours are available during Tax Season.