

Install Document Explorer and Email Management 3.8.1 on the Workstations (if using BOTH Document Explorer and Email Management)

1. If an older version of ProSystem fx Document Explorer, Document Drive, or Email Management is installed, go to Start > Control Panel > Add/Remove Programs (or Programs and Features if using Vista) and remove them
2. Close Microsoft Outlook if it is open
3. If using a 32 bit workstation, download the file "ProSystem fx Document Explorer 3.8.1 With Email Management.zip." This file is listed under Document Explorer > Version 3.8.1 with Email Management 32-bit on the ProSystem fx Document Updates site (<http://support.cch.com/updates/Document>)
4. If using a 64 bit workstation, download the file "ProSystem fx Document Explorer With Email Management 3.8.1.zip (x64).zip." This file is listed under Document Explorer > Version 3.8.1 with Email Management 64-bit on the ProSystem fx Document Updates site (<http://support.cch.com/updates/Document>)
5. Extract the zip file to a location on the workstation, and double click on Setup.exe
6. If installing on a 32 bit workstation, open "Document Explorer With EM x86." If installing on a 64 bit workstation, open "Document Explorer With EM x64"
7. Double click on Setup.exe
8. The installer will prompt you to install any prerequisites that are not already installed
9. 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
10. Click Next, accept the license agreement, then click Next again
11. Enter the name of your Document server or website (do not enter http:// or /document, only the server or website name) and click Next
12. Click on Browse to change the install location if you would like to install to a location other than the default
13. Click on "Just me" if you would like to install the applications only for the user that is currently logged in
14. Click on Next, then Next again to start the installation
15. After the installation completes, click on Close and then reboot the workstation
16. 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
17. Go to Start > Programs > CCH Incorporated > ProSystem fx Document > ProSystem fx Document Explorer to launch the application
18. 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
19. Open Microsoft Outlook

20. The plug-in may take several minutes to load depending on the number of clients you have in the system. You may work inside of Outlook while this process is occurring
21. After it is finished loading, you should see the Email Management panel in the lower-left section of Outlook