

Installing Email Management and Document Explorer 3.8.1 on Document 3.7

Email Management and Document Explorer versions 3.8.1 can be used with the Document 3.7 server application if server-side patches are installed on the Document and Portal servers.

Install Document Server Patch

1. Log in to your Document Server
2. Download the file "Prosystem fx Document EM Fix.exe" from the ProSystem fx Document Updates website (<http://support.cch.com/updates/Document>) The file is listed under Version 3.7 Document Server Patch.
3. Run "Prosystem fx Document EM Fix.exe"
4. Click Next. If Document is installed to a location other than the default location, click on Change, browse to the install location, then click Next
5. Enter the Document SQL Instance name (usually SERVERNAME\PROFXDOCUMENT)
6. Select "SQL Server authentication using the Login ID and password below"
7. Enter "sa" for the Login ID and the sa password
8. Click on Next, then Install
9. To verify that the patch was successful, browse to C:\Program Files\ProSystem fx Document (or the location Document is installed) and check the date modified on the file Document\bin\CCH.Document.Business.Clients. If the patch was successful, the date modified on this file should be 12/30/2009.

Install Portal Server Patch (skip if you do not have the Client Portal)

1. Log in to your Portal Server
2. Download the file "Prosystem fx Document Portal EM Fix.exe" from the ProSystem fx Document Updates website (<http://support.cch.com/updates/Document>) The file is listed under Version 3.7 Document Portal Server Patch.
3. Run "Prosystem fx Document Portal EM Fix.exe"
4. Click Next. If the Portal is installed to a location other than the default location, click on Change, browse to the install location
5. Click on Next, then Install
6. To verify that the patch was successful, browse to C:\Program Files\ProSystem fx Document (or the location the Portal is installed) and check the date modified on the file ClientPortal\bin\CCH.Document.Business.Clients. If the patch was successful, the date modified on this file should be 12/30/2009

Install Email Management on the Workstations (if using Document Drive)

1. If an older version of Email Management is installed, go to Start > Control Panel > Add/Remove Programs (or Programs and Features if using Vista) and remove it
2. Close Microsoft Outlook if it is open
3. Extract the zip file "Email Management 3.8.1.zip" to a location on the workstation
4. If installing on a 32 bit workstation, open "EM 3.8 - x86." If installing on a 64 bit workstation, open "EM 3.8 - x64"
5. Double click on Setup.exe
6. The installer will prompt you to install any prerequisites that are not already installed
7. 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
8. Click Next
9. Click on Browse to change the install location if you would like to install to a location other than the default, then click Next
10. Click on Next, then Next again to start the installation
11. After the installation completes, click on Close and then reboot the workstation
12. Verify you are logged into the Document Drive (right click on the Document Drive icon on the desktop and select Login)
13. Open Microsoft Outlook
14. The plug-in may take several minutes to load depending on the number of clients you have in the system. Do not work inside of Outlook until this process is finished
15. After it is finished loading, you should see the Email Management panel in the lower-left section of Outlook

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. Extract the zip file "Document Explorer 3.8.1.zip" to a location on the workstation
3. If installing on a 32 bit workstation, open "Document Explorer No EM x86." If installing on a 64 bit workstation, open "Document Explorer No EM x64"
4. 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

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. Extract the zip file "Document Explorer With Email Management 3.8.1.zip" to a location on the workstation
4. 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"
5. Double click on Setup.exe
6. The installer will prompt you to install any prerequisites that are not already installed
7. 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
8. Click Next, accept the license agreement, then click Next again
9. Enter the name of your Document server or website (do not enter http:// or /document, only the server or website name) and click Next
10. Click on Browse to change the install location if you would like to install to a location other than the default

11. Click on “Just me” if you would like to install the applications only for the user that is currently logged in
12. Click on Next, then Next again to start the installation
13. After the installation completes, click on Close and then reboot the workstation
14. 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
15. Go to Start > Programs > CCH Incorporated > ProSystem fx Document > ProSystem fx Document Explorer to launch the application
16. 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
17. Open Microsoft Outlook
18. 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
19. After it is finished loading, you should see the Email Management panel in the lower-left section of Outlook