

Carswell Folio 4.3 Installation Guide

The Operating Systems supported by Carswell are **Windows 95/98/NT/2000/XP**. Please note that Folio 4.3 is not available for the Macintosh platform.

Carswell Technical Support - Telephone support for Carswell's CD-ROM products is available by calling **416-609-8000** or **1-800-387-5164**. Our e-mail address is carswell.techsupport@thomson.com.

Please also feel free to consult our on-line troubleshooting site at http://www.carswell.com/eproducts/tech_support.asp.

Recommendations:

CD ROM Installation: This installation is for users with limited Hard Drive space. To use the product, the CD must be in the CD-ROM drive.

Hard Drive Installation: This installation is for users who want to install everything to their hard drive.

Network / Client Installation: There are two parts to this installation: first, the Network part is installed to a network drive. Next, the Client part is installed from the network drive to each client workstation. This is the recommended method for distributing the product to many client machines.

Installation from CD Tower / CD Image: These are alternatives to the traditional network / client installation. Install from a CD Tower if you have limited space on your network drives.

Special Note on Updating from Folio 4.2 to Folio 4.3: If you have several products and some of them are still Folio 4.2-based, **please update them first and then continue with your Folio 4.3-based products**. Once you update your Folio 4.2 CDs to Folio 4.3, please make sure you update the Client installation on all Client PCs.

Installation Instructions:

Part 1 - [CD ROM / Hard Drive Installation](#)

Part 2 - Installation to the Network

a. Network / Client Installation

1. [Network Installation](#)

2. [Client Installation](#)

b. [Installation from CD Tower / CD Image](#)

Part 3 - Update Installation

a. [CD ROM / CD Tower / CD image / Hard Drive Installation](#)

b. Network / Client Installation

1. [Network Installation](#)

2. [Client Installation](#)

Part 4 - [Reinstall/Uninstall](#)

Part 1 - CD ROM / Hard Drive Installation:

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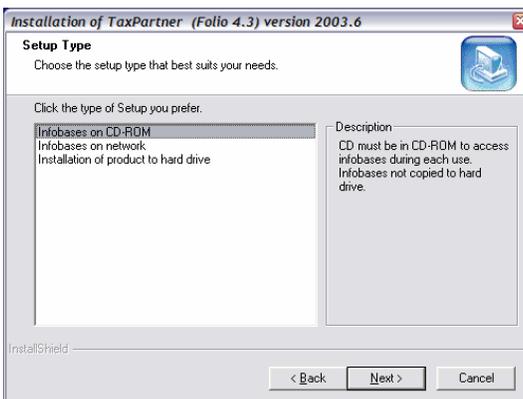
1. Click the Start button
2. Click Run
3. Type <CD-ROM Drive Letter>:\setup (For example D:/setup)
4. Click OK



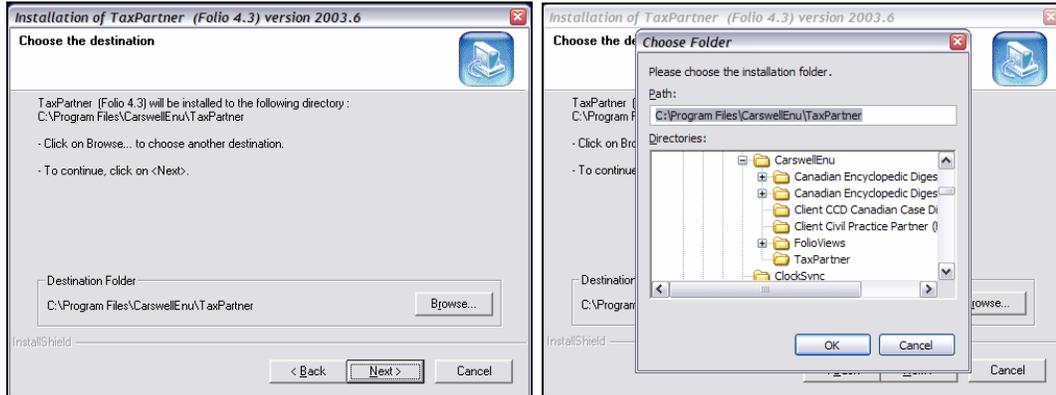
5. You will see the Welcome Screen, click **NEXT** to continue



6. If you accept the license agreement, click **YES**



7. You now have 3 options. If you prefer to run a CD-ROM installation, select "**Infobases on CD ROM**". If you prefer to run a Hard Drive installation, select "**Installation of product to hard drive**" and click **NEXT**.



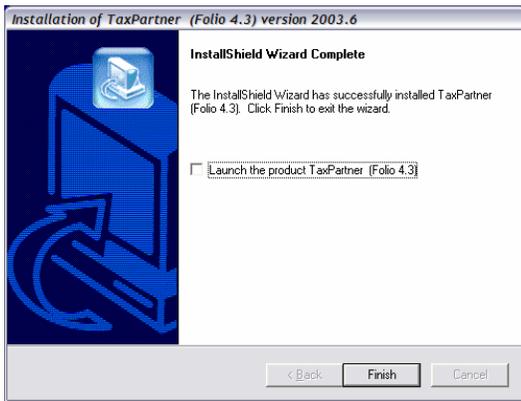
8. The default destination folder is C:\Program Files\CarswellEnu**<product name>**. If you would like to select a different location simply click on the **BROWSE** button and select a different directory. Click **NEXT**.

(**NOTE:** If you are installing multiple products, you must make sure that each one is installed to its own subdirectory. Carswell products cannot share a destination folder with non-Carswell products).



9. The NEXT screen prompts you for the name of the Program group that will be created in your Programs folder. Click **NEXT**.

10. The installation process now has enough information to begin installing the program to your computer. This process may take several minutes.

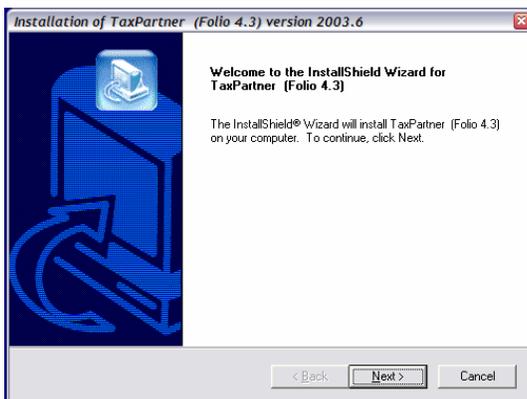


11. Once the installation has successfully completed click **FINISH**.

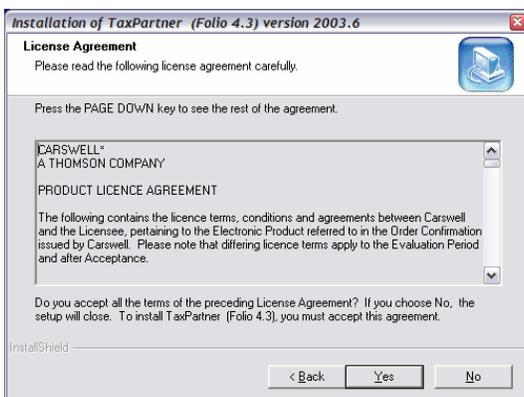
Part 2(a)(1) – Network Installation

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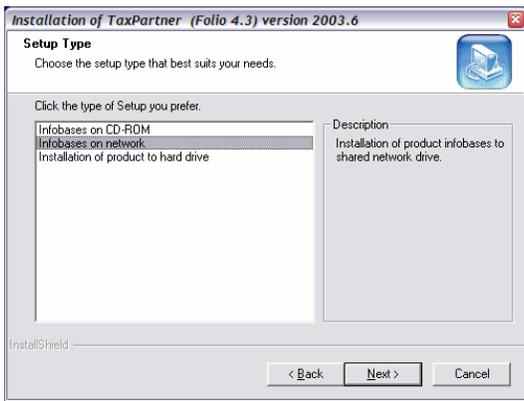
1. Click the Start button
2. Click Run
3. Type <CD-ROM Drive Letter>:\setup (For example D:/setup)
4. Click OK



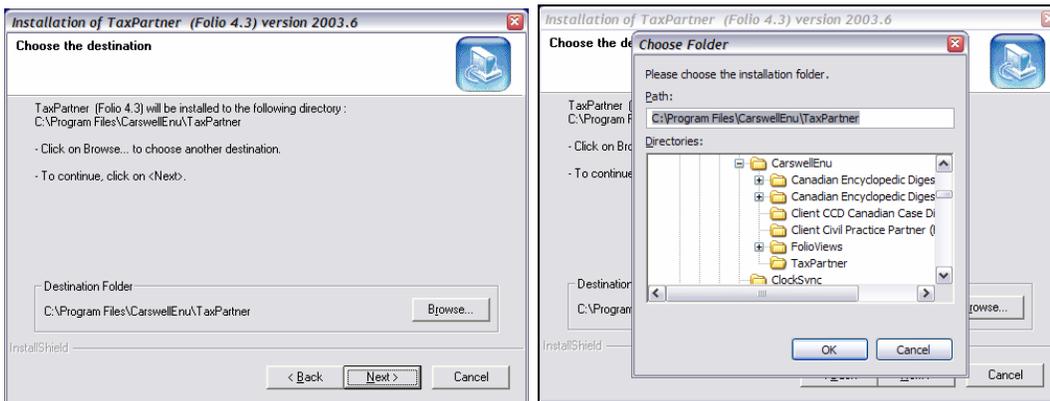
5. You will see the Welcome Screen, click **NEXT** to continue



6. If you accept the license agreement, click **YES**



7. You now have 3 options. Select "**Infobases on network**" and click **NEXT**.



8. The default destination is C:\Program Files\CarswellEnu\<product name>. Click on the **BROWSE** button and select a location on your Network. Click **NEXT**. (**Note**: Clients MUST have read/write access to the destination folder on the network).

(**NOTE**: If you are installing multiple products, you must make sure that each one is installed to its own subdirectory. Carswell products cannot share a destination folder with non-Carswell products).

9. The installation process now has enough information to begin installing the program to your computer. This process may take several minutes.



10. Once the installation has completed, you will see a screen informing you of the location of the Client setup file on the Network. Click **FINISH** to complete the server setup.

Part 2(a)(2) – Client Installation

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This guide assumes that the client installation will be done from a client PC and that the end-user has full read/write access to the installation folders on the Network as well as Administrator rights to his/her own PC.

1. Browse to the network location the product was installed to and run the setup.exe file in the program folder.



2. You will get a welcome screen for the CLIENT installation, click *NEXT*.



3. If you accept the license agreement, click *YES*



4. The default destination is C:\Program Files\CarswelEnu\<>product name>. If you would like to select a different location simply click the **BROWSE** button and select a new location. Click **NEXT**.

(**NOTE:** If you are installing multiple products, you must make sure that each one is installed to its own subdirectory. Carswell products cannot share a destination folder with non-Carswell products).



5. The default Program Group is Client <product name> Folio 4.3



6. Click **FINISH** to complete the Client setup. (Note: The Client setup is run only once. Any subsequent updates only have to be updated at the server level)

Part 2(b) – Installation from CD Tower / CD Image

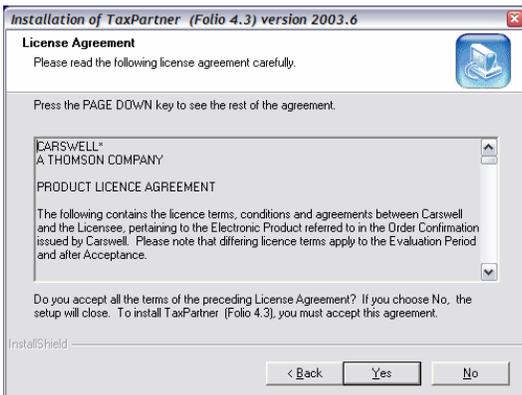
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Note: These are alternatives to the traditional network / client installation. You should install from a CD Tower if you have limited space on your network drives.

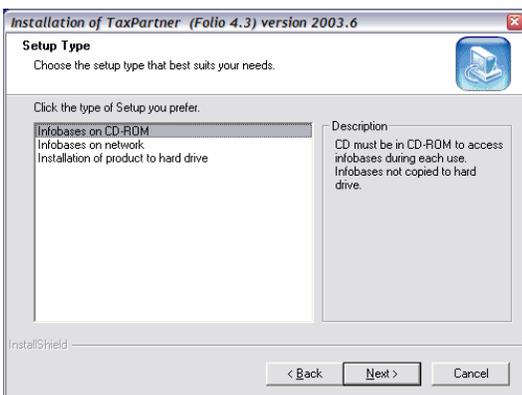
1. If you are installing from a CD image, you should first copy and paste the files from the CD ROM into a folder on your network drive (i.e. – image of <product name>).
2. Click on the setup.exe icon from the folder you just created.



3. You will see the Welcome Screen, click **NEXT** to continue



4. If you accept the license agreement, click **YES**

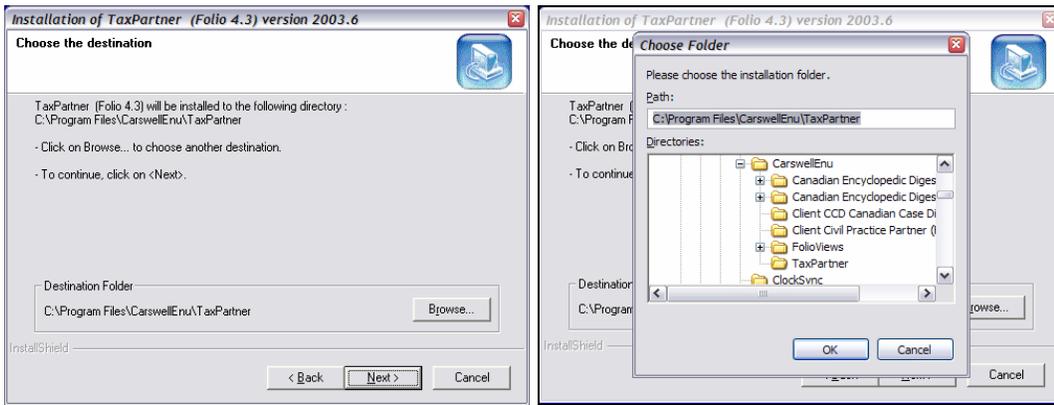


5. You now have 3 options:

If you prefer to run a Hard Drive installation, please continue from step 7 of the instructions for a [CD ROM / Hard Drive Installation](#).

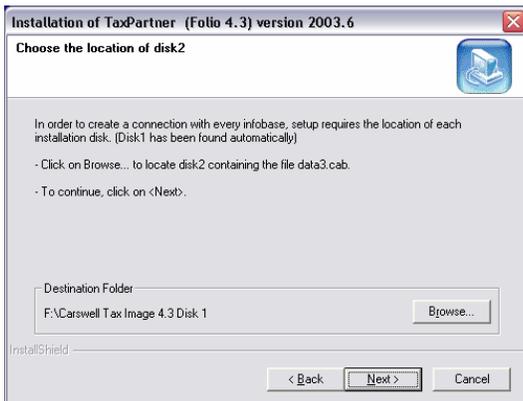
If you prefer to run a Network installation, please continue from step 7 of the instructions for a [Network Installation](#).

If you wish to continue with a CD ROM installation, please select "**Infobases on CD-ROM**" and click **NEXT**.



6. The default destination folder is C:\Program Files\CarswellEnu*<product name>*. If you would like to select a different location simply click on the **BROWSE** button and select a different directory. Click **NEXT**.

(**NOTE:** If you are installing multiple products, you must make sure that each one is installed to its own subdirectory. Carswell products cannot share a destination folder with non-Carswell products).



7. If you are installing a multi-disk product and the path to the CD image is long (i.e. it contains more than just a drive letter), the installation process will prompt you for the location of **ALL** of the remaining disks. Simply click on the **BROWSE** button and select the location.



8. The NEXT screen prompts you for the name of the Program group that will be created in your Programs folder. Click **NEXT**.

9. The installation process now has enough information to begin installing the program to your computer. This process may take several minutes.



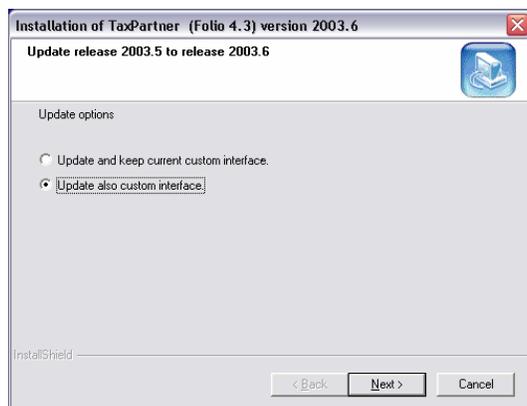
10. Once the installation has successfully completed click **FINISH**.

Part 3(a) – Update Installation - CD ROM / CD Tower / CD Image / Hard Drive Installation

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Special Note on Updating from Folio 4.2 to Folio 4.3: If you have several products and some of them are still Folio 4.2-based, **please update them first and then continue with your Folio 4.3-based products.**

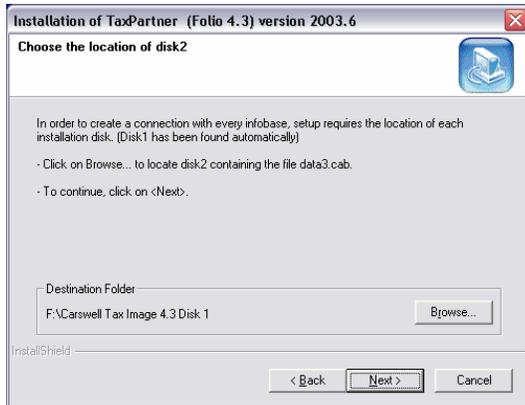
1. Click the Start button
2. Click Run
3. Type <CD-ROM Drive Letter>:\setup (For example D:/setup)
4. Click OK



5. You will see an update screen with 2 options:

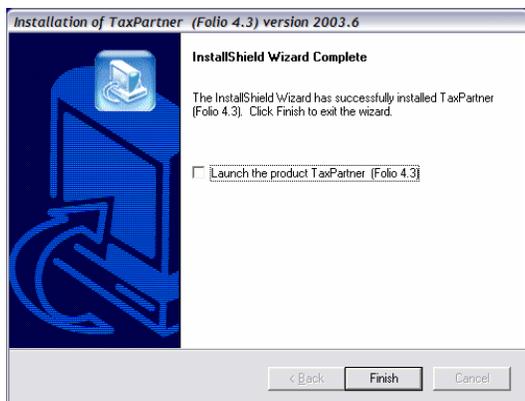
- Update and keep current custom interface – this option should be used whenever you change the appearance of FolioViews manually; it will save any of these changes
- Update also custom interface – this option will restore the appearance of FolioViews (this is the default option)

Make your selection and click **NEXT**.



6. If you are updating the CD-ROM installation of a multi-disk product from a CD image and the path to the image is long (i.e. it contains more than just a drive letter), the installation process will prompt you for the location of **ALL** of the remaining disks. Simply click on the **BROWSE** button and select the location.

7. The installation process now has enough information to begin installing the program to your computer. This process may take several minutes.



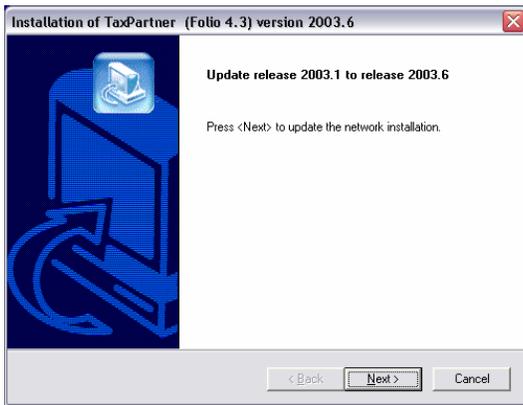
8. Once the installation has successfully completed click **FINISH**.

Part 3(b)(1) – Update Installation – Network Installation

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Special Note on Updating from Folio 4.2 to Folio 4.3: If you have several products and some of them are still Folio 4.2-based, **please update them first and then continue with your Folio 4.3-based products.** Once you update your Folio 4.2 CDs to Folio 4.3, please make sure you update the Client installation on all Client PCs.

1. Click the Start button
2. Click Run
3. Type <CD-ROM Drive Letter>:\setup (For example D:/setup)
4. Click OK



5. Click **NEXT** to update the Network Installation



6. If your product directory name contains the words "**(Folio 4.2)**", the installation process will generate the screen above. Please choose whether to update your current network installation directory or delete it and create a new directory name without the FolioViews version number.

When updating from Folio 4.2 to Folio 4.3, remember to update the Client installation on all of your Client PCs. It makes sense to update the existing directory only if you have mapped it as a drive letter (i.e. if the directory [\\CarEnu\ProvincialTaxPartner](#) (Folio 4.2) has been mapped as drive K: on every Client PC). Otherwise, choose to create a new directory.

7. The installation process now has enough information to begin installing the program to your computer. This process may take several minutes.

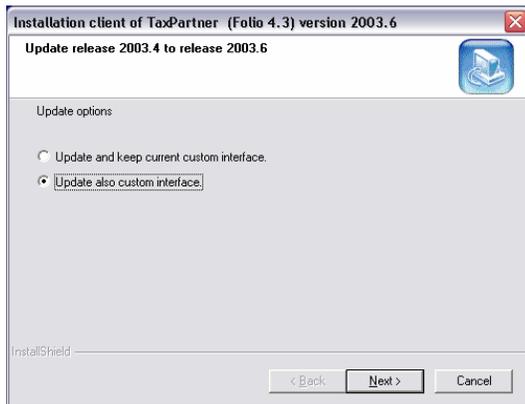


8. The installation will complete, click **FINISH**

Part 3(b)(2) – Update Installation - Client Installation

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1. Browse to the network location the product was installed to and run the setup.exe file in the program folder.



2. You will see an update screen with 2 options:

- Update and keep current custom interface – this option should be used whenever you change the appearance of FolioViews manually; it will save any of these changes
- Update also custom interface – this option will restore the appearance of FolioViews (this is the default option)

Make your selection and click **NEXT**.

3. The installation process now has enough information to begin installing the program to your computer. This process may take several minutes.



4. Once the installation has successfully completed click **FINISH**.

Reinstallation – CD ROM / Hard Drive / Network

Insert the product disc in the CD ROM drive of the installation PC and run setup.exe
You will have two options. Select reinstallation and click NEXT.
The process may take several minutes. Click Finish to complete.

Reinstallation – Client

Access the network installation directory. Locate the file setup.exe and run it.
You will have two options. Select reinstallation and click NEXT.
The process may take several minutes. Click Finish to complete.

Uninstall – CD ROM / Hard Drive / Client

Run the shortcut "Maintenance of Product..." from within the product's program group (Select Start > Programs > [Product Name] > Maintenance of Product...)
You will have two options. Select uninstall option and click NEXT.
Click Finish to complete.

Uninstall – Network

Select Start > Settings > Control Panel > Add or Remove Programs
Locate the product you wish to uninstall
Select "Change/Remove" button.
Select uninstall option and click NEXT.
Click Finish to complete.