PRACTICE CS INSTALLATION INSTRUCTIONS

Use this document to do the following:

- install Practice CS®

- download and install the license and application updates, and

- run desktop setup (for network installations only)

Installing Practice CS

You can install Practice CS to a network or to a standalone computer.

Notes

- The installation process may require you to restart the computer. If you are installing the application on a network, be sure that all other users have logged off the network.

- Installation must be performed at the computer that you want to designate as the Database Server.

- The computer where the shared files are installed must be turned on in order for the application files to be available to users (workstations).

1. If you haven't done so already, download the application installation file from our website. (See the Practice CS download page for instructions.)

2. From the computer on which the database will reside, verify that you are logged in to your computer or server as an administrator.

3. Close all open applications, including background virus protection applications.

4. Navigate to the EXE file that you downloaded from the website. If you saved the file to the browser's default location, the EXE will be in your DOWLNLOADS folder.

5. Double-click the EXE to extract the files to the default folder (C:\Practice CS\ <version> Download) or to another folder of your choosing. If the installation wizard doesn't start automatically, navigate to the folder to which you extracted the files and double-click **Setup.exe**.

6. When Practice CS Setup starts, click the **Install Practice CS** link. The wizard will guide you through the rest of the installation.

7. Practice CS uses Microsoft® SQL Server® (including 2008 Express Edition and later) for storing data. The computer on which the data is located (the SQL server) must be turned on in order for others to access the data. In addition, you must create an exception within the firewall for the instance of SQL Server you are using (recommended) or disable the firewall (not recommended) to run Practice CS. If

you need assistance in creating an exception for the instance of SQL Server you are using, please refer to your firewall's documentation.

Downloading and installing the license

After you install the application files, use CS Connect™ to download and install the license. In rare cases, you may receive a license file via email. If you received a license file via email, please skip the following procedure and proceed to "Installing licenses received via email" on page 2. Otherwise, complete the following procedure to install the licenses for your Practice CS application.

Obtaining and installing licenses via CS Connect

Complete the following procedure to open Practice CS and use CS Connect to obtain and install the licenses electronically.

1. Verify that you are logged in to your computer or server as an administrator.

2. Start Practice CS.

3. Click Cancel to close the login dialog.

4. To open CS Connect, choose Help > About Practice CS, and click the Download Licenses button.

5. Enter your firm ID (listed on your CS web account and on your mailing label) and your firm mailing address ZIP code, or PIN, and click Next.

   Note: If the Connect – Communications Setup dialog opens, verify or select the applicable communications settings, and then click OK to close the dialog.

6. In the CS Connect dialog, click OK. CS Connect logs in to our secure data centers and downloads your licenses.

7. Follow the remaining prompts to install the licenses.

Installing licenses received via email

1. If you received a Practice CS license file via email, please follow the instructions in that email message and then follow the steps below.

2. The installation wizard prompts you to choose the destination location for Practice CS. You need to choose the folder where the shared files are installed. (The final destination for the application should be a folder called \WINCSI. For example, you may have installed your shared files in F:\APPS\WINCSI.)

3. After you have verified the destination path, click **Next** to continue with the installation.

Important! Even if you received your original license files via email, all updates to your Practice CS license information are available **only** via CS Connect. If you require an updated license in the future (for example, if you purchase a license for an optional add-on module later), you will need to download and install the updated license via CS Connect, as described in "Obtaining and installing licenses via CS Connect" on page 2.

Running desktop setup (for network installations only)

Important! If you installed the shared files on a network, you must also run the desktop setup program on each workstation.

The desktop setup program ensures that each workstation meets the minimum operating system requirements and confirms that all required components are installed. When you run the desktop setup program, a shortcut to the single network installation of Practice CS (on your firm's server) is added to each desktop. This keeps all firm-wide files and data in a single location on the server. We recommend that network users do not install the full application on their local computers.

1. Verify that you are logged in to your computer as an administrator.

2. Close all open applications.

3. Click Start on the Windows taskbar and choose Run.

    Note: In Windows 8, enter **Run** in the search box.

4. In the Run dialog, enter **Z:\path\Practice CS\Desktop\Setup.exe** (where **Z** represents the mapped drive letter for the network path to the server on which you installed the shared files, and **path** is the path to your Practice CS folder). For example, if you installed the shared files in F:\WINAPPS\WINCSI, you would need to enter **F:\WINAPPS\WINCSI\Practice CS\Desktop\ Setup.exe** in the Run dialog or **\\<name of server>\WINAPPS\WINCSI\Practice CS\Desktop\ Setup.exe**.

    Note: If you need to uninstall the Practice CS desktop setup from a workstation, choose Start > Control Panel > Programs and Features, select Practice CS, and then click the Uninstall button.

    In Windows 8, enter **Control Panel** in the search box and choose Programs & Features.

5. Click OK and follow the prompts.

6. Remote Entry requires a local installation of Microsoft SQL Server, version 2008 or later. If you chose to enable Remote Entry, you will be prompted to select an existing instance of SQL Server, or to install a new instance. Select an existing instance of SQL Server to use for Remote Entry, or click the option to install a new instance. Then click **Next**.

7. When prompted that the Practice CS setup has been successfully completed, click **Finish**.