
INSTALLATION INSTRUCTIONS

2017 FileCabinet CS

Use this document to complete the following installation tasks.

- Install FileCabinet CS®.
- Download and install the licenses and updates.
- Run desktop setup (for network installations only).
- Install a database for FileCabinet CS information (optional).

Installing FileCabinet CS

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

Note: If your firm chooses to run FileCabinet CS in a terminal server environment, a certified terminal server professional must complete the installation. See the [Installing CS Professional Suite Applications in a Terminal Server Environment](#) PDF for general information to provide to your firm's terminal server technician.

1. If you haven't done so already, download the application installation file from our website. (See the [FileCabinet CS download page](#) for instructions.)
2. Verify that you are logged in to your computer or server as an administrator.
3. Close all open applications, including background virus protection applications.

Important! To ensure the proper installation of FileCabinet CS, verify that all CS Professional Suite and Microsoft® Office applications have been closed on all network computers.

4. Navigate to the EXE file that you downloaded from our website. If you saved the file to the browser's default location, the EXE will be in your DOWNLOADS folder.
5. Right-click the EXE and choose Run as Administrator to start the installation wizard.
6. Click Yes to accept the terms of the license agreement. The installation wizard will guide you through the rest of the installation.
7. After completing the installation, follow the steps in the "Downloading and installing the licenses and updates" section.

Downloading and installing the licenses and updates

After you install FileCabinet CS, use CS Connect™ to download and install the licenses and updates.

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

Note: If CS Connect does not open automatically, choose Help > About FileCabinet CS, and click the Download Licenses button.

3. Enter your firm ID (listed on your CS web account and on your mailing label) and 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. Click OK to close the dialog.

4. In the CS Connect dialog that opens, click the Call Now button. CS Connect downloads your licenses and any FileCabinet CS updates from our secure data centers; follow the prompts to complete this process.

FileCabinet CS will close to apply these licenses and updates.

5. When the update process is complete, click the Close button in the CS Connect – Applying updates dialog to restart FileCabinet CS.

For more information, see [Downloading and installing licenses via CS Connect](#) and [Downloading and applying updates](#).

Note: If you also purchased licenses Fixed Assets CS, Planner CS, ToolBox CS, and/or UltraTax CS, this process installs the licenses for these applications as well. There is no need to repeat the process from within each application.

6. If applicable, proceed to the “Run desktop setup (network installations only)” and “Install the FileCabinet CS database (optional)” sections.

Run desktop setup (network installations only)

Important! If you installed FileCabinet CS on a network and if this is the first installation, you must also run the desktop setup application on each computer that will run FileCabinet CS. The desktop setup application might run automatically the first time you start FileCabinet CS.

The desktop setup application ensures that each computer meets the minimum operating system requirements and confirms that all required components are installed. When you run desktop setup, a shortcut to the single network installation of FileCabinet 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 FileCabinet CS on their local computers.

To run the desktop setup program from each workstation, do the following.

1. Verify that you are logged in to your computer as an administrator, then close all open applications.
2. Click Start on the Windows taskbar and choose Run.
3. In the Run dialog, enter `<h:\folder>\WINCSI\Cabinet\Desktop\Setup.exe` (where `<h:\folder>` represents the server location where you installed FileCabinet CS and license files).
4. Click OK and follow the prompts.

Install the FileCabinet CS database (optional)

You can store FileCabinet CS data in a database format rather than in the default format. Using the database format is especially helpful if you have many FileCabinet CS users (approximately 15 or more). The FileCabinet CS database enables your firm to take advantage of the performance, control, scalability, and reliability that the database format offers.

The FileCabinet CS database requires an instance of Microsoft SQL Server (2008 or higher). You can use an existing instance of SQL Server, install the free SQL Server Express (2008 or higher) instance with the FileCabinet CS database, or you can purchase SQL Server 2008 or higher from Microsoft or a retailer.

Notes

- Because SQL Server Express is free, Microsoft limits the database size. If your FileCabinet CS data is approaching or exceeds 100GB in size, you must use a licensed instance of SQL Server. If you do not already have a licensed instance, you will need to purchase SQL Server before installing the database.
- For more information about choosing a storage format, see [FileCabinet CS: Data File Format Alternatives \(Standard vs. SQL\)](#).

Complete the following steps to install and configure the FileCabinet CS database.

Important!

- You must be physically present at the database server to complete these steps. The installation process may require you to restart the computer. If you are installing the database on a network, ensure that all other users have logged off of the server.
- The computer on which the data is located — running SQL Server or SQL Server Express — must be turned on for others to access the data. In addition, if this computer has a firewall, Windows Vista®, or Windows 7 installed, 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 use the FileCabinet CS database. If you need help creating an exception for the instance of SQL Server you are using, please refer to your firewall's documentation.

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1. Verify that you are logged in to your computer or server as an administrator.
 2. Close all open applications, including background virus protection applications.
 3. Click Start on the Windows taskbar, choose Run, enter `<h:\folder>\WINCSI\Cabinet\SQL\Setup.exe` (where `<h:\folder>` represents the location where you installed FileCabinet CS), and click OK.
 4. Follow the prompts to verify that you are installing the database on the computer that you want to designate as the database server, to accept the license agreement, to restart the computer (if required), and to verify the location of the FileCabinet CS application files.

5. When prompted to choose the appropriate instance of SQL Server (during Installation Step 2), click one of the following options.
 - Click the *Use the SQLEXPRESS instance of Microsoft SQL Server 2008 or higher* option if you have an instance named SQLEXPRESS, and then click Next. The installation wizard completes the configuration process.
 - Click the *Use an existing instance of Microsoft SQL Server 2008 or higher* option if you purchased and set up an instance of SQL Server. Click Next, select the instance, and configure it as required. (If you have an instance named CREATIVESOLUTION that was installed with another CS Professional Suite application, you can use this instance for the FileCabinet CS database. However, if it is an instance of SQL Server Express, you are still limited to 40GB of data storage space for FileCabinet CS data.)
 - Click the *Install a new instance of Microsoft SQL Server 2008 R2 Express Edition SP1* option if you do not have an existing instance of SQL Server and your data storage requirements are less than 100GB. Click Next, and enter an instance name. (We recommend that you use **SQLExpress** as the name.) Follow the prompts to use either the default location for the SQL Server data folder or to choose another location.
6. Follow the prompts to complete the installation process. The installation application places a green checkmark next to each step that you complete. To repeat a step, click the Step 1, Step 2, or Step 3 link.