

## Carswell FOLIO 4.7 Installation Guide

The Operating Systems supported by Carswell are **Windows 2000/XP/Vista**. Please note that Folio 4.7 is not available for the Macintosh platform.

**Carswell Technical Support** - Telephone support for Carswell's CD-ROM products is available by calling **416-609-3800** or **1-800-387-5164**. Our e-mail address is [carswell.techsupport@thomsonreuters.com](mailto:carswell.techsupport@thomsonreuters.com).

Please consult our on-line troubleshooting site at <http://www.carswell.com/eproducts/foliohelp/index.asp> for any known Folio 4.7 issues.

All installations require administrative privileges.

### **Recommendations:**

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

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.

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.

**Special Note on Updating from Folio 4.3 to Folio 4.7:** Folio 4.7 products are not updates to Folio 4.3 products. It is possible to use Folio 4.3 products in parallel to Folio 4.7 products, by installing each one to a different directory. You may uninstall the Folio 4.3 version of any product after installing the new Folio 4.7 version of the same product.

**Special Note for Windows Vista Users:** When installing products by running msixec (including silent installations) ensure to elevate user privileges to administrator level. See Part 5 for additional instructions.

### **Installation Instructions:**

- Part 1 - [CD ROM/Hard Drive/Custom Installation](#)
- Part 2 - Installation to the Network
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- Part 4 - [Repair/Remove](#)
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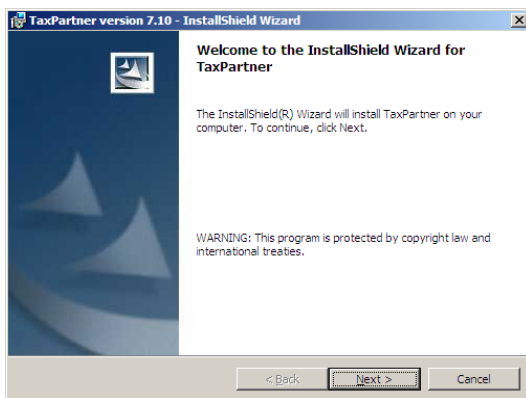
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## Part 1 - CD ROM/Hard Drive/Custom Installation:

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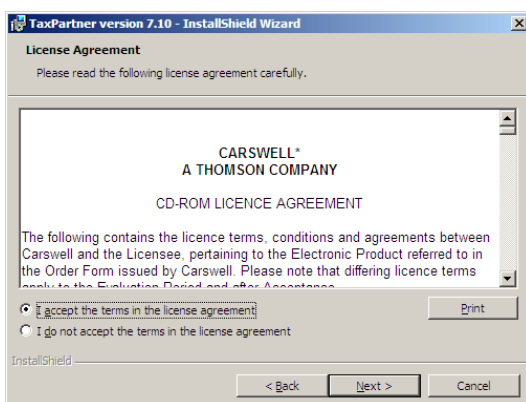
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1. Insert **CD-ROM** into the CD-ROM drive.
2. Click the **Start** button.
3. Click **Run**.
4. Type **<CD-ROM Drive Letter>:\setup**. (**Example:** D:\setup)  
*Alternatively*, click the **Browse...** button and locate the CD-ROM drive letter from the drop-down list in the Browse dialog box. Click **setup.exe** and click **Open**.
5. Click **OK**.
6. The Welcome screen appears. Click **Next** to continue.



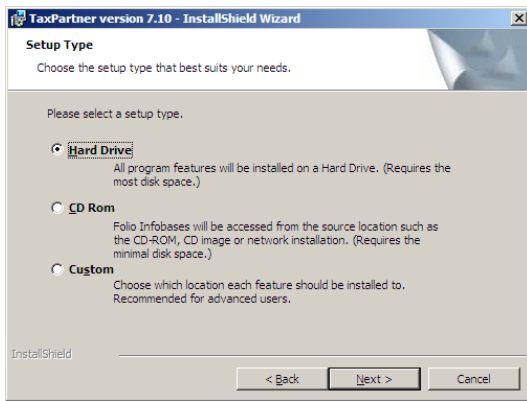
**Figure 1**

7. Accept the license agreement and click **Next**.



**Figure 2**

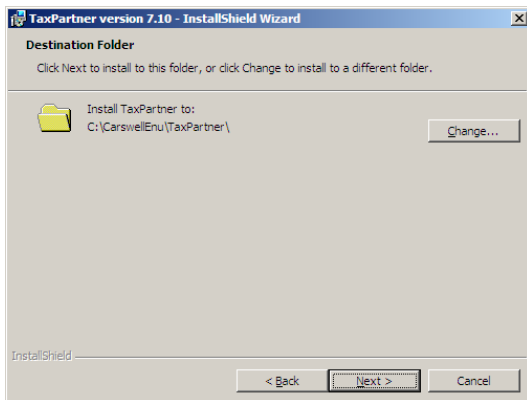
8. You now have 3 options (see Figure 3): Select **Hard Drive** to install all features on the hard drive. Select **CD Rom** if you prefer to access the infobases from the source media. Select **Custom** if you would like to install each feature to a different location. Click **Next**.



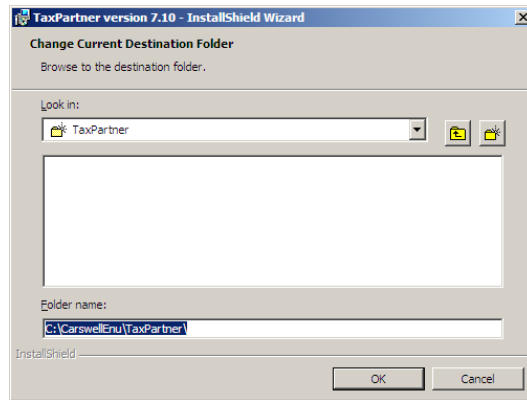
**Figure 3**

9. (a) If you have selected the Hard Drive or CD-ROM option, the following screen appears (see Figure 4). The default destination folder is **C:\CarswellEnu\<product name>**. If you would like to select a different location, simply click the **Change...** button and select a different directory. Click **Next**.

**NOTE:** When choosing the Hard Drive or CD-ROM option you may not change the path to FolioViews. If you are installing multiple products, you must make sure that each product is installed to its own subdirectory. Thomson Carswell products cannot share a destination folder with non-Thomson Carswell products.



**Figure 4**



**Figure 5**

9. (b) If you have selected the Custom option, the following screen appears (see Figure 6). The default destinations for the following features are:

- **FolioViews 4.7:** C:\Program Files\Common Files\CarswellEnu\FolioViews4.7
- **Infobases:** C:\CarswellEnu\<ProductName>\NFO
- **License file:** C:\CarswellEnu\<ProductName >\LCF
- **Support files:** C:\CarswellEnu\<ProductName >

If you choose to run any feature from the source media (CD-ROM drive or CD image), click on each component and select one of the two options located at the bottom of the dialog box:

**This feature will be installed to run from CD or This feature, and all sub features, will be installed to run from the CD.**

Users can not change the destination when running any of the features from the source media.

If you want to install a feature on a hard drive, select a different location by selecting the feature, click the **Change...** button and choose a different directory.

**NOTE:** Choose the same FolioViews location for all Thomson Carswell Folio 4.7 products.

Click **Next**.

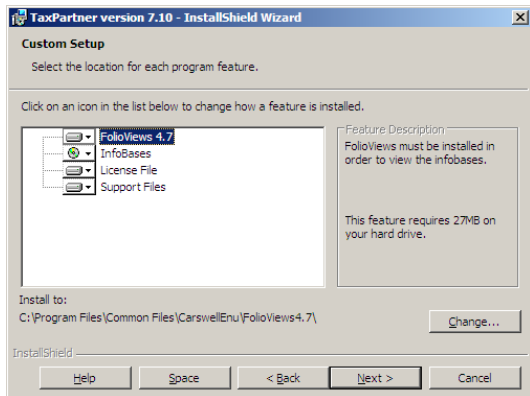


Figure 6

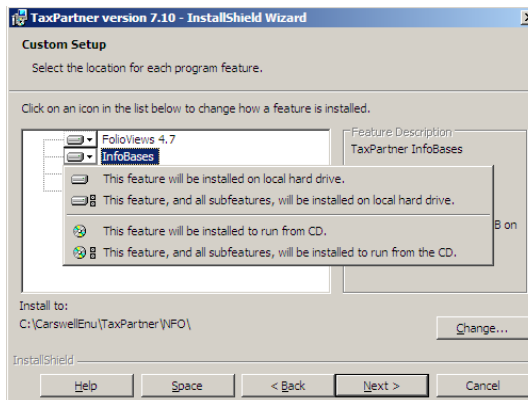


Figure 7

10. The program will begin installing on your computer. This process may take several minutes.

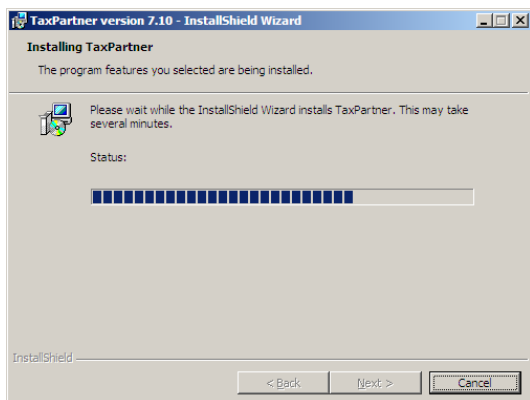


Figure 8

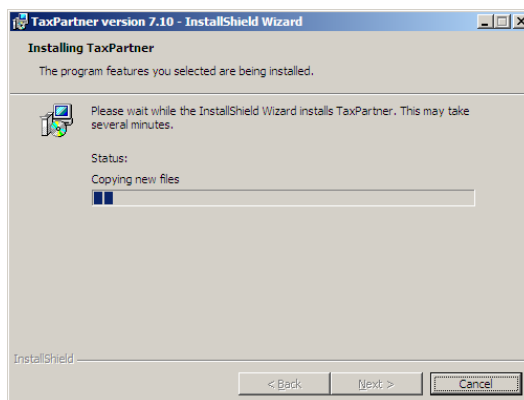


Figure 9

11. Once the installation has successfully completed, click **Finish**.

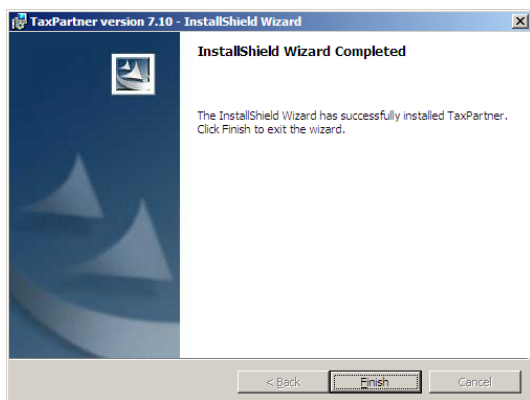


Figure 10

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## Part 2(a)(1) – Network Installation (Advanced Users Only)

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Create a CD image on the network by copying the installation disc(s). For multi-disc products copy all discs into the same directory.

There is no uninstall, update or reinstall for the network installation. The previous directory should be removed manually or overwritten by the next release.

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

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## Part 2(a)(2) – Client Installation (Advanced Users Only)

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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 target installation directory as well as Administrator rights to his/her own PC.

Please follow the instructions for the Hard Drive, CD-ROM or Custom installation to perform a client install. **The setup must be executed from the network installation location.** (Example: F:\TaxPartner\setup.exe)

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## Part 2(a)(3) – Silent Client Installation (Advanced Users Only)

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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.

Table-1 shows the directory names for each of the features and their default locations:

**Table-1:**

Feature	Directory name	Default Directory value
FolioViews	FOLIOVIEWS_DIR	C:\Program Files\Common Files\CarswellEnu\FolioViews4.7\
NFO	NFO	C:\CarswellEnu\<ProductName>\NFO\
LCF	LCF	C:\CarswellEnu\<ProductName>\LCF\
Support Files	PROD_DIR	C:\CarswellEnu\<ProductName>\

**NOTE:** Choose the same FolioViews location for all Thomson Carswell Folio 4.7 products.

If you would like to create a log file for any of the silent installations append **/I <path to log file>** (Example: /I c:\log.txt) at the end of any command line.

You have the following options for silent client installations:

■ **Command lines for silent hard drive installation:**

msiexec /i <Network Product Install Location>\<ProductName>.msi /qn  
For example:

```
msiexec /i F:\TaxPartner\TaxPartner.msi /qn
```

**OR**

If you would like to change the directory of any of the features use this command line and make any necessary changes to the directories:

```
msiexec /i "F:\TaxPartner\TaxPartner.msi" /qn FOLIOVIEWS_DIR="C:\Program Files\Common Files\CarswellEnu\FolioViews4.7\" NFO="C:\CarswellEnu\TaxPartner\NFO\" LCF="C:\CarswellEnu\TaxPartner\LCF\" PROD_DIR="C:\CarswellEnu\TaxPartner\"
```

■ **Command line for silent installation with all components accessed from source:**

```
msiexec /i <Network Product Install Location>\<ProductName>.msi /qn ADDSOURCE=ALL
```

For example:

```
msiexec /i "F:\TaxPartner\TaxPartner.msi" /qn ADDSOURCE=ALL
```

**NOTE:** Please ensure that users have write access to the LCF directory.

■ **Command line for silent installation with some components accessed from source and others copied to the hard drive:**

```
msiexec /i <Network Product Install Location>\<ProductName>.msi /qn ADDSOURCE=NFO,FolioViews ADDLOCAL=LCF,SupportFiles LCF="<hard drive location of LCF component>" PROD_DIR="<hard drive location of support files>"
```

```
msiexec /i "F:\TaxPartner\TaxPartner.msi" /qn ADDSOURCE=NFO,FolioViews ADDLOCAL=LCF,SupportFiles LCF="C:\TaxPartner\LCF\" PROD_DIR="C:\TaxPartner\"
```

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**Part 2(b) – Installation from CD Tower**

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**NOTE:** This type of installation is no longer available for Folio 4.7.

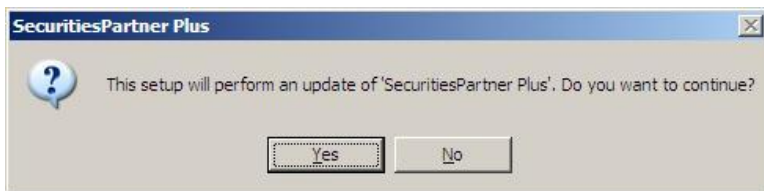
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## Part 3(a) – Update Installation - Hard Drive / CD-ROM / Custom Installation

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1. Insert **CD-ROM** into the CD-ROM drive.
2. Click the **Start** button.
3. Click **Run**.
4. Type <**CD-ROM Drive Letter**>:\setup (Example: D:/setup).
5. Click **OK**.
6. Click **Yes** to continue with the update.



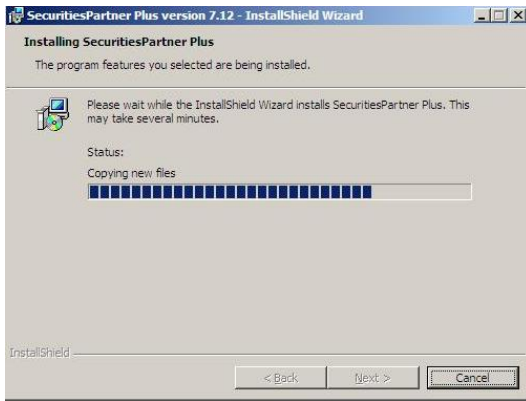
**Figure 11**

7. Click **Update** to proceed.



**Figure 12**

8. The program will begin installing on your computer. This may take several minutes.



**Figure 13**

9. Once the installation has successfully completed, click **Finish**.



**Figure 14**

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

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See [Part 2\(a\)\(1\)](#) – Network Installation.

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

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Run setup from network installation location. See Part 3(a) – Update Installation - Hard Drive / CD-ROM / Custom Installation.

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### **Part 4 – Repair/Remove**

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#### **■ Repair – Hard Drive/CD ROM/Custom**



Insert the product disc in the CD Rom drive of the installation PC and run **setup.exe**. You will have two options; select **Repair** 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 **Repair** and click **Next**. The process may take several minutes. Click **Finish** to complete.

#### ■ **Remove – Hard Drive /CD ROM / Client**

Open **Control Panel** and select **Add/Remove Programs**. Select the product you would like to remove and click **Remove**. Click **Yes** to continue with the removal.

#### ■ **Uninstall – Network**

Manually delete the network installation.

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### **Part 5 – Additional Information for Windows Vista Users (with Administrative Rights)**

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Follow these steps to create a shortcut to **cmd.exe** and run an installation as an administrator in Windows Vista.

1. Copy **cmd.exe** from **c:\Windows\system32**.
2. Paste as a shortcut to your desktop.
3. Right-click the CMD icon, click **Properties**, select the **Shortcut** tab and click **Advanced**.

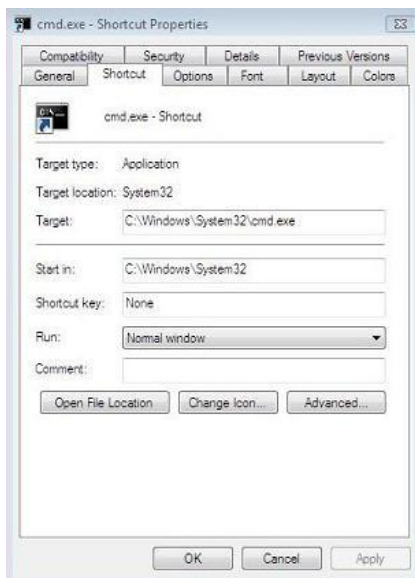


Figure 15

4. Select **Run as administrator** and click **OK**.



Figure 16

5. Double click on the shortcut to launch cmd.exe as administrator.

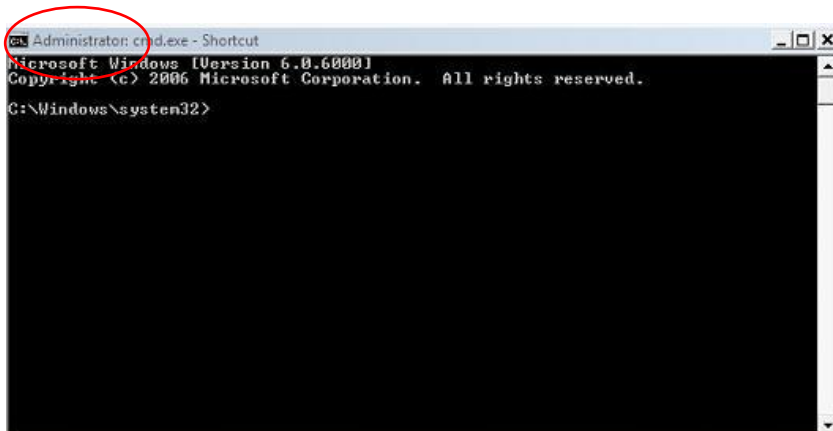


Figure 17

6. Paste the command line: **msiexec /i <path-to-msi>** and hit **Enter**.

**Example:** msiexec /i "D:\TaxPartner\TaxPartner.msi"