



CCH® perform plus III™ / WK Forms™

Installation Guide for Internet and CD Subscribers

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Minimum System Requirements

Before installing CCH® *perform plus III™* or *WK Forms™*, check to see that your PC meets the following minimum system requirements:

System Requirement	Specification
- HARDWARE -	
Processor	Pentium III or faster processor [Pentium IV or higher recommended]
RAM	256 MB of RAM or greater (512 MB recommended)
CD-ROM	16X (min)
Internet Connection	56Kbps modem or better recommended
Display Resolution	Super VGA 800x600 256 colors (1024x768 32-Bit Color or higher recommended)
Hard Disk Storage	50 MB of free space for application and associated system files
- SOFTWARE -	
Operating System	Microsoft Windows® 2000 with Service Pack 4 (SP4) Windows XP with Service Pack 1 (SP1). Service Pack 2 (SP2) is required if you are connecting through a proxy server/firewall. Windows 2000/2003 Server for shared CD-ROM access
Internet Browser	Microsoft Internet Explorer 5.5 SP2 or 6.0 SP1
Printer	HP PCL 4, 5 and 6, inkjet and postscript compatible
Proxy and Firewall Configuration	As supported by your Internet browser, use of authentication supported for Clear Text UserID and Password.
PDF reader	Adobe Reader 7.0 or above
- PRIVILEGES -	
User Rights	User should have Administrator permissions on their PC.

Installing *perform plus III* or *WK Forms* (Internet)

To begin the installation from the Internet:

- Login to the CCH Research Network and proceed to your “forms” tab.
- Click the **Install *perform plus III* software** or **Install *WK Forms* software** link.
- On the “Welcome” screen, click the **Install** button. The “One-Click Install” screen is displayed.
- Click the **Install** button.
- If a “Security Warning” dialog box is displayed, click **Install** to confirm that you want to run the installation program.
- If a “*This site might require the following ActiveX control: ‘install’ from ‘Wolters Kluwer US’. Click here to install*” warning message is displayed at the top of your browser window, click the warning message bar and select **Install ActiveX Control** from the menu that appears. On the “Internet Explorer – Security Warning” dialog box that is displayed, click the **Install** button.



The *perform plus III* or *WK Forms* installation program is downloaded to your computer. This process may take a few minutes based on your Internet connection speed.

- If you receive a “Security Warning” dialog box asking you if you want to run the software, click the **Run** button.
- At the “Welcome” screen, click the **Next** button.
- The installation checks to see if the Microsoft .NET Framework is installed on your computer and installs it if necessary. On the “.NET license agreement” dialog box, click in the checkbox next to “I agree” and click the **Install** button. Once the .NET Framework installation is complete, click **OK** to continue the installation.

Note: If your computer is running Win XP SP 1, an additional message may be displayed. Click **OK** to continue.

The “License Agreement” dialog box is displayed.

- Click in the radio button next to **I accept the terms in the license agreement**, and then click the **Next** button. (**Note:** Click the **Print** button to print a copy of the license agreement.)

The “Destination Folder” dialog box is displayed.

- Click the **Next** button to accept the default destination folder, or click the **Change** button to select a different destination folder. (**Note:** If you decide to change the destination folder, click the drop-down arrow on the “Change Current Destination Folder” dialog box to select a folder, or type the exact folder path – including drive letter – in the “Folder name” field. Click **OK** once you have selected a folder.)

The “Ready to Install the Program” dialog box is displayed.

- Click the **Install** button.

The *perform plus III* or *WK Forms* application is installed on your computer. The installation process may take a few minutes. When the installation is complete, the “InstallShield Wizard Completed” dialog box is displayed.

- Click in the appropriate checkboxes if you want to launch *perform plus III* or *WK Forms* (or view the “read me” file), and then click the **Finish** button.

Starting *perform plus III* or *WK Forms* (Internet)

To start *perform plus III* or *WK Forms*:

- Double-click the *perform plus III* or *Wolters Kluwer Forms* desktop icon.
- or -
- Click the **Start** button, select **Programs**, and then point to the location on the “Start” menu in which you installed *perform plus III* or *WK Forms*.

Note: Now that you have the forms application installed, you no longer need to log in to the CCH Research Network to launch *perform plus III* or *WK Forms*.

Filling out the “First Time Use” dialog box (Internet)

The first time you open *perform plus III* or *WK Forms*, the “First Time Use” dialog box is displayed. The information you enter in the “First Time Use” dialog box sets some of the application preferences and gets you connected quickly and easily. When you are finished entering information on the “First Time Use” dialog box, click **OK**.

If for some reason you are not able to enter the necessary information when the “First Time Use” dialog box is displayed, you can enter the information later by clicking the **File** menu and selecting **Preferences**.

First Time Use

Welcome to the WK Forms product. Please enter the applicable information below so we may begin. This information needs to be entered only once and can be updated by using the Preferences option.

Saved Forms Path
Keep my saved forms and client information in the following folder
C:\Wolters Kluwer\WKForms

CD Unlock Codes

Form Access Path

Login
Enter your Username and Password.
Username:
Password:
Research Sites: tax.cchgroup.com
 IP Authentication

Firewall/Proxy Server Information

Saved Forms Path – A default saved forms path is displayed. Click the **Browse** button to select a different saved forms path.

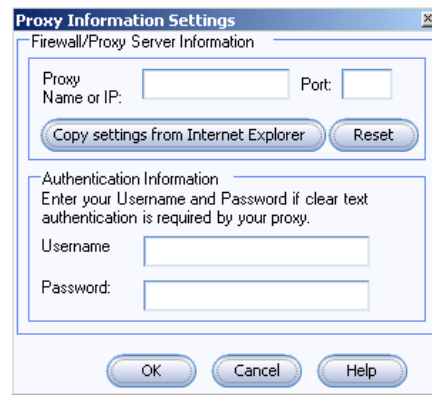
Login – The Internet version of *perform plus III* or *WK Forms* requires a valid user name and password. When you install *perform plus III* or *WK Forms* from the CCH web site, your user name and password are populated automatically. If the user name and password are not automatically populated, enter your CCH user name and password in the spaces provided. Once you have entered your user name and password, click the drop-down arrow and select the URL that matches the research site to which you subscribe. (**Note:** If you have arranged to have IP based authentication, the checkbox next to **IP Authentication** should be checked.)

Firewall/Proxy Server Information – If the computer on which you use *perform plus III* or *WK Forms* is set up behind a firewall, or if you use a proxy server to access the Internet, you need to set up *perform plus III* or *WK Forms* accordingly. If you have any questions regarding your local firewall or proxy server settings, please contact your local network administrator.

To set your firewall/proxy server information:

- Click the **Setup** button.

The "Proxy Information Settings" dialog box is displayed.



- Type the proxy name or IP address of the proxy server in the "Proxy Name or IP" field.
- Type the port number for the proxy in the "Port" field.
- or -
- Click the **Copy settings from Internet Explorer** button to copy the proxy settings currently being used by Internet Explorer into *perform plus III* or *WK Forms*. (**Note:** The proxy settings used in Internet Explorer and that are copied into *perform plus III* or *WK Forms* are copied "exactly" as used in Internet Explorer. No changes are made to these settings, and any changes that may need to be made to the settings need to be made directly in Internet Explorer before copying them into *perform plus III* or *WK Forms*.)
- If authentication is used by the proxy, type your user name and password in the spaces provided.
- When you are finished entering your proxy information settings, click **OK**.

Installing *perform plus III* or *WK Forms* (CD)

To begin the installation from the CD:

- Insert the *perform plus III* or *WK Forms* CD into your CD-ROM drive. (**Note:** Users licensed for Local Area Network access need to insert the CD into a shared CD-ROM drive.)
- Click the **Start** button, and then click the **Run** button.
- In the Run dialog box, type **d:\SETUP** and click **OK**. (**Note:** You may need to substitute the "d:" with the actual drive letter of your CD-ROM drive.)

Note: Local Area Network users can run the setup from a mapped network drive or UNC path.

- The installation checks to see if the Microsoft .NET Framework is installed on your computer and installs it if necessary. On the ".NET license agreement" dialog box, click in the checkbox next to "I agree" and click the **Install** button. Once the .NET Framework installation is complete, click **OK** to continue the installation.

Note: If your computer is running Win XP SP 1, an additional message may be displayed. Click **OK** to continue.

- At the “Welcome” screen, click the **Next** button.

The “License Agreement” dialog box is displayed.

- Click in the radio button next to **I accept the terms in the license agreement**, and then click the **Next** button. (**Note:** Click the **Print** button to print a copy of the license agreement.)

The “Destination Folder” dialog box is displayed.

- Click the **Next** button to accept the default destination folder, or click the **Change** button to select a different destination folder. (**Note:** If you decide to change the destination folder, click the drop-down arrow next to “Look in” on the “Change Current Destination Folder” dialog box to select a folder, or type the exact folder path – including drive letter – in the “Folder name” field. Click **OK** once you have selected a folder.)

The “Ready to Install the Program” dialog box is displayed.

- Click the **Install** button.

The installation process may take a few minutes. When the installation is complete, the “InstallShield Wizard Completed” dialog box is displayed.

- Click in the appropriate checkboxes if you want to launch *perform plus III* or *WK Forms* (or view the “read me” file), and then click the **Finish** button.

Starting *perform plus III* or *WK Forms* (CD)

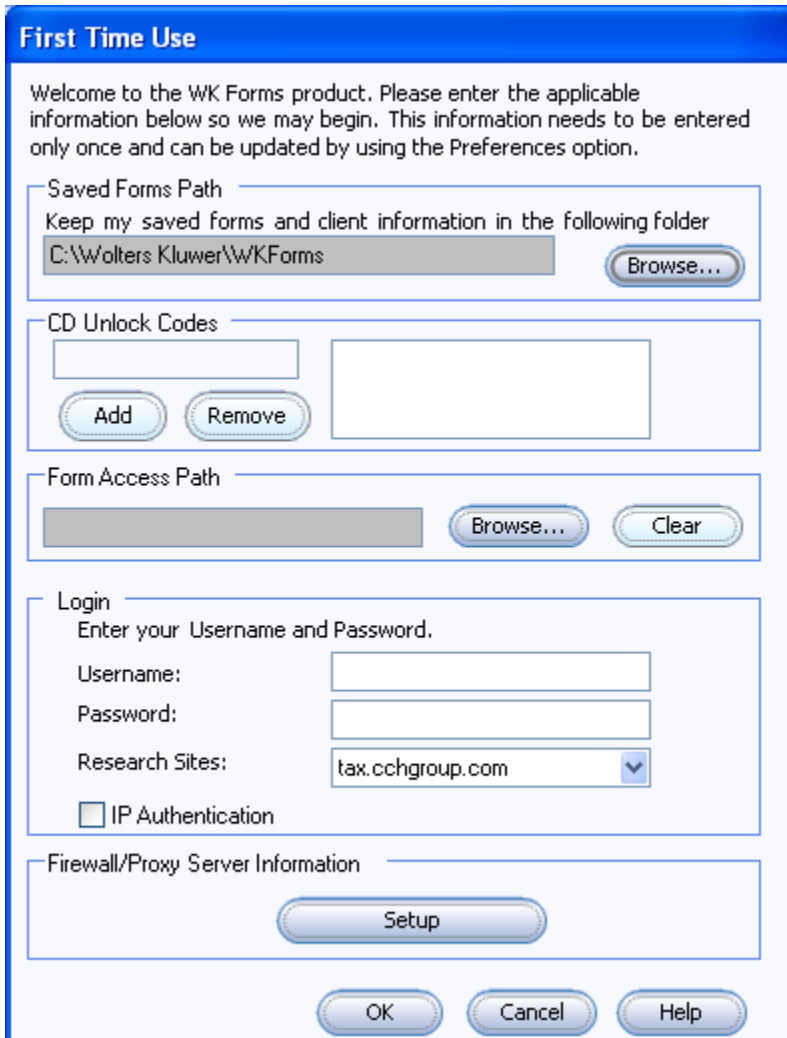
To start *perform plus III* or *WK Forms*:

- Double-click the *perform plus III* or *Wolters Kluwer Forms* desktop icon.
- or -
- Click the **Start** button, select **Programs**, and then point to the location on the "Start" menu in which you installed *perform plus III* or *WK Forms*.

Filling out the "First Time Use" dialog box (CD)

The first time you open *perform plus III* or *WK Forms*, the "First Time Use" dialog box is displayed. On this screen, you can enter your CD unlock code, set your Saved Forms Path, set your Forms Access Path, and set proxy/firewall settings.

If for some reason you are not able to enter the necessary information when the "First Time Use" dialog box is displayed, you can enter the information later by clicking the **File** menu and selecting **Preferences**.



First Time Use

Welcome to the WK Forms product. Please enter the applicable information below so we may begin. This information needs to be entered only once and can be updated by using the Preferences option.

Saved Forms Path
Keep my saved forms and client information in the following folder
C:\Wolters Kluwer\WKForms

CD Unlock Codes

Form Access Path

Login
Enter your Username and Password.
Username:
Password:
Research Sites: tax.cchgroup.com
 IP Authentication

Firewall/Proxy Server Information

Saved Forms Path – A default saved forms path is displayed. Click the **Browse** button to select a different saved forms path.

Form Access Path – If it does not already appear, you will need to enter the path to the *perform plus III* or *WK Forms* CD. (For example, type "**d:**" if "d" is the letter of your CD-ROM drive.)

CD Unlock Code – You need to enter the code you were provided with your CD in the space provided and click the **Add** button. **Note:** If you are licensed for Local Area Network forms access, you need to also enter your LAN access code.

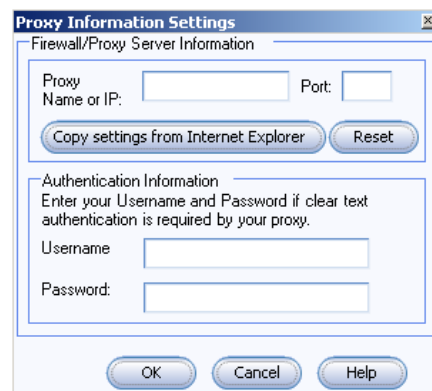
Note: The "Login" section is for dedicated Internet *perform plus III* and *WK Forms* users and does not apply to accessing forms from the CD product.

Firewall/Proxy Server Information – If the computer on which you use *perform plus III* or *WK Forms* is set up behind a firewall, or if you use a proxy server to access the Internet, you need to set up *perform plus III* or *WK Forms* accordingly. If you have any questions regarding your local firewall or proxy server settings, please contact your local network administrator.

To set your firewall/proxy server information:

- Click the **Setup** button.

The "Proxy Information Settings" dialog box is displayed.



- Type the proxy name or IP address of the proxy server in the "Proxy Name or IP" field.
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- Click the **Copy settings from Internet Explorer** button to copy the proxy settings currently being used by Internet Explorer into *perform plus III* or *WK Forms*. (**Note:** The proxy settings used in Internet Explorer and copied into *perform plus III* or *WK Forms* are copied "exactly" as used in Internet Explorer. No changes are made to these settings, and any changes that may need to be made to the settings need to be made directly in Internet Explorer before copying them into *perform plus III* or *WK Forms*.)
- If authentication is used by the proxy, type your user name and password in the spaces provided.
- When you are finished entering your proxy information settings, click **OK**.

Contact Customer Support

For help installing *perform plus III* or *WK Forms*, contact our Technical Support team.



CLICK

<http://support.cch.com/performplus>



CHAT

<http://support.cch.com/chat/techsupport>



CALL

(800) 835 - 0105

Live chat and toll-free phone support are available from 8 a.m. to 6 p.m. CT, Monday through Friday. Our Customer Support web site is available 24 hours a day.