# Folio Views infobase(s) downloads quick reference guide

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Introduction

Thank you for subscribing to the Virtual Professional Library Folio Views infobase(s) download method of delivery. Please note that new subscribers must first install Folio Views before they install the Folio Views infobases. Whenever you get an email notification from CAstore downloads, you must perform an update by following the steps in Part B – Installing Virtual Professional Library Infobases.

When updating the infobase(s), only the titles that are updated for the month will appear with a checkmark on the My downloads page. The update procedure will refresh the infobase(s) and/or the license file(s) ensuring your continued access to the infobase(s).

We trust that the Virtual Professional Library will be a valuable addition to your reference library and we welcome any comments or suggestions that can help us improve our products and service. If you have any questions regarding the installation and operation of our products, please contact CPA Canada Technical support personnel. In Toronto call (416) 977-0748, for the rest of Canada, call 1-800-268-3793.

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</tr>
</tbody>
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Getting started

To install/update Folio Views, or the infobase(s) to which you subscribe:

1. Log in to Castore.ca.
2. Click on the My downloads link at the top right of the CAstore home page.

3. If you have multiple download subscriptions, click on the Folio Views infobase(s) link on the left hand navigation or scroll down the page to where the Folio Views infobase(s) section begins.
First time installation

Part A – Installing Folio Views 4.7.1

1. Click on the Folio Views software link and click the download now button, as seen below.

![Download Link](Image)

2. Click Save on the File Download dialog. This will prompt your Internet browser to begin the Download process. Ensure that the file is saved in a place that is easily accessible.

![File Download Security Warning](Image)

3. Locate the directory in which you saved VPL.exe, and double-click on the file. When VPL.exe is executed, it will launch the Choose Setup Language screen. Select your preferred language and click Next > to continue.

4. At the Welcome screen click Next > to continue.

5. At the License Agreement screen, please read it and select I accept to continue. If you select I do not accept, the installation will end here. Click Next > to continue.
6. At the Customization Level screen, select your installation preference and click **Next >**:
   a. Typical (Local) installations
   b. Custom Installation (for network installations)

*Tip: Information about each installation type can be found on this page, beside the corresponding button.*
Once you’ve selected your installation preference, click Install to begin the installation.

For Local updates proceed to step 7.
For Network updates proceed to step 8.

Note: If a previous version of setup of Folio Views has been detected and cannot be uninstalled, setup will display the following message:
It is strongly recommended that you cancel setup by clicking **Yes** so that you can uninstall the previous installation of Folio Views. However, you can continue setup by clicking **No**. If no previous installation of Folio Views has been detected, setup will go directly to the installation progress dialog, seen below.

7. **For local installation:**
   a. At the Setup Complete screen, click **Finish**.
   b. Proceed to **Part B – Installing Virtual Professional Library infobases.**
8. **For custom installation**: The custom installation is slightly different. After selecting Custom Installation in step 6, choose the type of Setup you prefer:

   a. Custom local install
   b. Network

   ![Virtual Professional Library - InstallShield Wizard](image)

   **Tip**: To view information about each Setup Type, click the Type and read the Description box on the side.
9. When you continue the setup process, you will be prompted for the installation path.

10. To select a new location path, click the **Browse** button and specify the location for the installation.

11. Click **Next >** to continue.

Unlike the Local installation option, setup will copy the files to the path you have selected on the network.
12. At the Setup Complete screen, click **Finish** and then proceed to **Part B – Installing Virtual Professional Library infobases.**

![InstallShield Wizard Complete]

*Setup has finished. You are now ready to proceed with workstation installations.*

*When performing workstation installs, make sure to run setup.exe from the network drive (\WPL) to which you just copied the files.*
Part B – Installing Virtual Professional Library infobases

1. To install Virtual Professional Library Infobases from the CAstore, click on the My downloads link at the top right of the CAstore home page.

![CAstore Home Page](image)

2. Only the titles to which you subscribed that have been updated will appear with a checked box. To ensure uninterrupted access, please download all checked titles by clicking on the download now button.

![My Downloads](image)

Note: If you do not have sufficient time to download all checked titles, you may choose to defer updating selected titles by de-selecting the checked box.
3. If you are a first time user, a message from your Internet browser will ask you to install and run an ActiveX script from InstallShield. Click **Yes** to install the ActiveX script to your machine. This will launch the Internet InstallShield Wizard.

![Security Warning](image)

4. Select the setup language and click **Next >**. Setup will prepare the InstallShield Wizard.

![Choose Setup Language](image)
5. At the Welcome screen, click **Next** > to continue.

At the License Agreement screen, please read it and select **Yes** to continue. If you select **No**, the installation will end here.
6. At the Customer Information screen, enter your name and company name. Click **Next >**.
7. At the Choose Customization Level dialog, choose the type of setup you would like to perform and click **Next >**.

For Typical (Local) Installations, proceed to **step 8**.

For Custom (Network) Installations, proceed to **step 9**.
8. For **local** installations:

   a. If setup is unable to locate an existing version of VPL Folio Views, it will prompt you to locate the folder. Click **Browse** to choose the folder in which Folio Views is located. Click **OK** and then **Next >**.

   ![Diagram of Setup Window]

   b. At the VPL Install Desktop Icons dialog, indicate whether you would like to have icons on your desktop. Click **Next >** to continue.

   ![Diagram of Desktop Icons Setup Window]
c. Setup will download the selected infobases. Depending on how many infobases you initially selected from the My downloads page, you may see multiple instances of the Setup Status screen, which displays the download progress.

d. At the Installation Wizard Complete screen, click Finish to exit setup.

e. Your downloads are complete. You may now open your infobase(s) from their icons or by going to Start, Programs, Virtual Professional Library.
9. For network installations, please complete the following:

a. At the Choose Destination Location for VPL screen, enter the location on the server where the NFO directory is located (i.e., network drive letter:\CPA Canada\FOLIO). Click Next >.

b. Click Install to begin the installation.

If you did not select a path, you will see the following popup error message.
c. Click **Finish** to exit the setup and proceed to **Part C – Setting up the Workstations** (or see step 10 below).

10. The Folio Views Infobase Install Complete web page provides instructions on what you should do next. Please note that this may take a few moments to appear on your screen.
Part C – Setting up the workstations

Using downloaded Folio Views and infobase(s) files

NOTE: There are two separate setup.exe files to execute for the workstation installation. Please execute both files from steps 1 and 2 below to successfully complete your workstation installation.

1. From the Windows Explorer of the workstation(s) you want to setup, execute the setup.exe file from the following directories (or from the alternate drive/directories where you have installed the program): network drive letter:\VPL\WRKSTN471\SETUP.EXE

2. Follow the onscreen instructions to proceed with the installation, and at the Setup Complete screen, click Finish and then execute the setup.exe file from the following directories (or from the alternate drive/directories where you have installed the program): network drive letter:\VPL\WORKSTN\WIN9xNT\SETUP.EXE

3. Follow the onscreen instructions to proceed with the installation; at the Setup Complete screen, click Finish to exit the setup.

4. You may now open your infobase by double-clicking on the new desktop icon(s). You may also access the infobases by going to Start > Programs > Virtual Professional Library (if you did not accept the default folder name during the Folio Workstation setup, open the folder name you specified), and clicking on the appropriate icon(s).

Using an existing version of Folio Views

1. Execute the setup.exe file from the following directories (or from the alternate drive/directories where you have installed the program):
   network drive letter:\VPL\WORKSTN\WIN95NT\SETUP.EXE
2. If setup is unable to locate an installation of VPL Folio Views, the following screen will prompt you to find a valid version of Folio Views on your local drive.

**Note:** In order for this to work, the systems administrator will have to change a value in setup.ini. The value in the .ini file will indicate the correct registry entry for the existing version of Folio Views. The .ini file value should be modified as follows:

```
Change VPL to the name of the folder where the existing version of Folio Views is installed. Using the sample screen above, the modified value would be:
RegKeyValue=OtherFolio
```
3. You may now open your infobase by double-clicking on the new desktop icon(s). You may also access the infobases by going to Start, Programs, Virtual Professional Library (if you did not accept the default folder name during the Folio Workstation setup, open the folder name you specified), and clicking on the appropriate icon(s).

When setup has finished creating the shortcuts, click **Finish** to exit.

### Updating Virtual Professional Library infobases

1. When your Virtual Professional Library infobases have been updated, you will receive a CAstore downloads email notification. A link from the email will take you to the My downloads page on the CAstore.

2. When updating the infobases to which you subscribe, only the titles that have been updated for the month will appear with a checkmark. Should you wish to install any of your subscriptions that have not been updated that month, please manually check the box beside each title that you would like to download.

3. You can proceed directly to **Part B – Installing Virtual Professional Library Infobases**.
Training tools

Help infobases
The Folio Views installation includes two user-friendly help infobases entitled Getting Started and Folio Help. These infobases provide information and training on the features and benefits of the Folio Views software. Open the Getting Started infobase from the icon in the Virtual Professional Library program folder. The Folio Help may be opened from the Help drop down menu in Folio Views by clicking on Contents.

Folio Views query syntax

<table>
<thead>
<tr>
<th>Operator or Scope</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>employee employer employee &amp; employer employee and employer</td>
</tr>
<tr>
<td>Or</td>
<td>employee</td>
</tr>
<tr>
<td>Not</td>
<td>employee ^ employer employee not employer</td>
</tr>
<tr>
<td>Exclusive Or (XOr)</td>
<td>employee ~ employer employee xor employer</td>
</tr>
</tbody>
</table>

Phrase | board of director |
Single Character Wildcard | identi?y accelerat??? |
Multiple Character Wildcard | tax* h*t* |
Ordered Proximity | employee employer /5 |
Unordered Proximity | “employee employer” @10 |
Stem (Word Form) | benefit% |
Thesaurus (Synonym) | person$ |
In Highlighters | [highlighters partner: second opinion] |
In Fields | [field section: 102] |
In Notes | [note proposed change ] |
In Popups | [popup queen | her majesty] |
FAQs

The following information is a compilation of technical questions and answers designed to assist you during the installation and use of your Virtual Professional Library infobase(s). Should you require further assistance, please call CPA Canada technical support.

When calling, please have your customer number at hand in order for us to better assist you with your questions. It is the number on your invoice which begins with a letter C (for example: C123456).

How do I contact CPA Canada technical support and/or customer service?

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</tr>
<tr>
<td>email: <a href="mailto:vpl.support@cpacanada.ca">vpl.support@cpacanada.ca</a>.</td>
<td>email: <a href="mailto:customerservices.group@cpacanada.ca">customerservices.group@cpacanada.ca</a>.</td>
</tr>
</tbody>
</table>

Do I have to perform the update procedure each time I receive a CAstore downloads email notification indicating that my downloadable Folio Views infobases are now available?
Yes. The update procedure refreshes the rights management file installed on your hard drive ensuring your continued access to the infobase.

When I print a section of text from my infobase, pages of pop-ups print along with it. How can I stop them from printing?
Go to Tools, Options, Print, and de-select the Pop-up Link Text under the Show heading.

When I perform a query, the number of hits does not show in the Contents view, how can I get them to show up?
Go to Tools, Options, Contents, and select Query Results under the Show heading.
During the installation or updating of an infobase the following error message appears on the screen, “An error occurred during the move data process.” This error generally occurs when there is not enough space on the drive where the file is being copied. You can check the amount of free space on your drive by going to Windows Explorer, right clicking on your drive and looking in Properties. If there is not enough space on your hard drive for the new infobase, you may want to free up some space. If this message occurs when doing an update, you can delete the current version of the infobase located in the NFO directory on your drive, and empty the Recycle bin. This will generally free enough space for the new infobase to be copied.

What do I need to do to reinstall the VPL to a new computer?
To install the VPL to a new computer, access the My Downloads page from the CAstore My downloads link.

Follow the instructions in the User Guide for first-time installations to install the infobases. If you subscribe to more than one title, ensure that all titles are checkmarked. If one of your titles does not appear in the My downloads list, please contact CPA Canada Technical Support.

What do I need to do to set up a new workstation?
When both Folio Views and the infobase(s) are installed on your network, follow Part C – Setting up the Workstations.

Can I have more than one type of installation on my computer?
No, the program was designed to accommodate only one type of installation and you must choose between Local or Network.

Why does my computer freeze up at 1% when I’m doing my monthly update?
Your system will freeze up because you do not have enough space for the installation or your anti-virus program is running in the background. You can check the amount of free space on your drive by going to Windows Explorer, right-clicking on your drive, and looking in Properties. If there is not enough space on your hard drive for the new infobase, you may want to free up some space. If this message occurs when doing an update, you can delete the current version of the infobase located in the NFO directory on your drive and empty the Recycle bin. This will generally free enough space for the new infobase to be copied. If you have sufficient space, it may be your anti-virus software that is stalling the installation. Please disable the anti-virus software temporarily and resume the Virtual Professional Library setup.
Is the VPL compatible with Windows 2000, XP, Vista, and Windows 7?
Yes, the VPL will install on all the above platforms.

Can I install Folio and the infobase on separate drives?
No, it is very important to install both on the same drive.

Why are my newly purchased infobase icons missing from my desktop?
When you have a network installation and you install a new infobase, the icon will not appear automatically on the workstations. You have to complete Part C – Setting Up the Workstations on every workstation that requires access to the new infobase.

Can I read the infobase from the My downloads page?
No, the infobases on the My downloads page are compressed and require installation onto a network or local drive in order to be readable.

How do I remove the VPL (Folio Views and the Infobases) from my computer?
Go to Start menu > settings/control panel > add/remove programs. You will find two programs: the first one called Virtual Professional Library and the second one called Virtual Professional Library – Infobase (Download). It is very important to remove Virtual Professional Library Infobase (Download) first and then remove Virtual Professional Library.

How do I remove the empty Virtual Professional Library folder from the Start menu?
Point your cursor on the folder in the Start menu, right click on the folder, and select delete in the drop down menu.
When I try to download my infobase(s), I get a message stating that my security settings need to be adjusted or a yellow bar appears across the top of the screen.

1. **Your browser’s ActiveX Controls might need to be adjusted.**
   
   Usually you will need to change the setting for “Download Signed ActiveX Controls” to ENABLE.
   
   To do this, Select Tools from your Internet Explorer toolbar:
   
   Internet Options>Security Tab.
   
   Select “Custom Level” button.
   
   Scroll down through the list of Active X Settings until you get to “Download signed ActiveX Controls”.
   
   Please change from Prompt to Enable, and select OK.

![Security Settings - Internet Explorer](image)

2. **Check to make sure that the Pop-Up Blocker is enabled.**

   Go to Tools>Pop-Up Blocker and select “Turn Off Pop-Up Blocker”

3. **Check that your Add-Ons are enabled.**

   If a yellow bar has appeared across the top of the page, please right-click on this bar directly to adjust this setting.
The download stops partway through, before it has completed. Please disable your anti-virus temporarily while completing the download. To ensure the security of your computer, please avoid accessing other web sites while the download is completing.

Please note that anti-virus software is automatically updated on a regular basis. Due to the number of updates made to anti-virus software, it is not uncommon for subscribers to find that they can download without any issues one month, and then experience a download issue due to an anti-virus update the following month.

My operating system is Windows Vista/Windows 7. When I try to download, nothing happens. Sometimes it is necessary to run Internet Explorer as an Administrator with Vista or Windows 7. This is due to the high security setting associated with these operating systems.

To run Internet Explorer as Administrator please do the following:

1. Right-click on the Internet Explorer icon on your desktop.
2. A menu should appear, and you can select “Run as Administrator” from the list.

OR

1. Browse to C:\Program Files.
2. Find and open the Internet Explorer folder.
3. Inside this folder, find an icon called iexplore.exe.
4. Right click on this icon, and a menu will appear. Please select "Run as administrator."

Please note that these administrative rights will only apply to the window you have just opened. As soon as you close that window and open another one by clicking on your Internet Explorer icon, these administrative rights will no longer be enabled within the new window.