

EZ-Compliance Installation Guide (Client Components)

(January 2015)

The present guide identifies and documents all the steps required to install the following applications:

- EZ-Compliance Admin Center application (Release 2015a)

SECTION 1.0 – List of components required to perform the installation

Verify that all following components are available before the start of the installation procedures:

- a) A 32 or 64 bits Windows based Operating System (Windows 7 or more) with at least 50MB of free space on the primary drive. Connection to the SQL Server via ODBC (Windows and SQL Authentication supported). Windows RT not supported.
- b) Full access to the appropriate EZ-Compliance Repository(ies) via UNC shares on the EZ-Compliance server.
- c) The EZ-Compliance Admin Center setup (available on the EZ-Compliance Server – above point).

SECTION 2.0 – List of installation tasks:

This section acts as a table of content of all steps to perform the installation. Click on any of the steps to go to the related installation section:

Client Installation:

- (I1) [Installation of EZ-Compliance Admin Center from an install shield \(setup.exe\)](#)

Launching the software:

- (L1) [Connecting to an EZ-Compliance Repository](#)
- (L2) [License validation of EZ-Compliance Client](#)
- (L3) [EULA](#)
- (L4) [Login](#)

Client Upgrades / Updates

- (Upd1) [EZ-Compliance Admin Center Update / Upgrade](#)

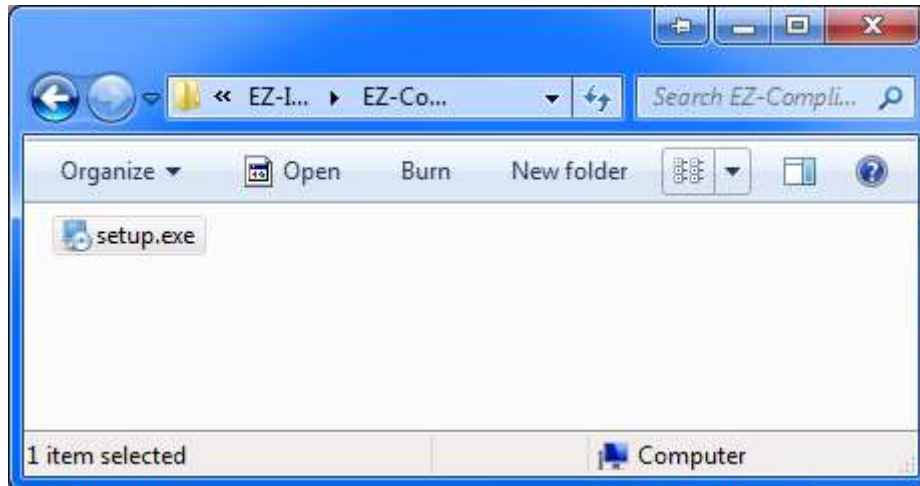
Client Uninstall:

- (Un1) [Uninstalling EZ-Compliance Admin Center](#)

SECTION 3.0 – Detailed Installation Instructions:

I1 – Installation of EZ-Compliance Admin Center from an install shield (setup.exe):

- a. Locate the EZ-Compliance_Shield directory on the following path:
\\[Server Name]\EZ-INSTALL\EZ-Compliance_Client_Shield*
Launch the **setup.exe** install shield. When prompted, reply “Next”, “Next”, “Next” and “Finish”. The EZ-Compliance Admin Center Application is automatically installed in the “Program Files” folder under “\EZ-Process\EZ-Compliance”.



*If you can't access the path, please ask your Network Administration to either provide your account Read access to this path or provide the file directly to your machine.

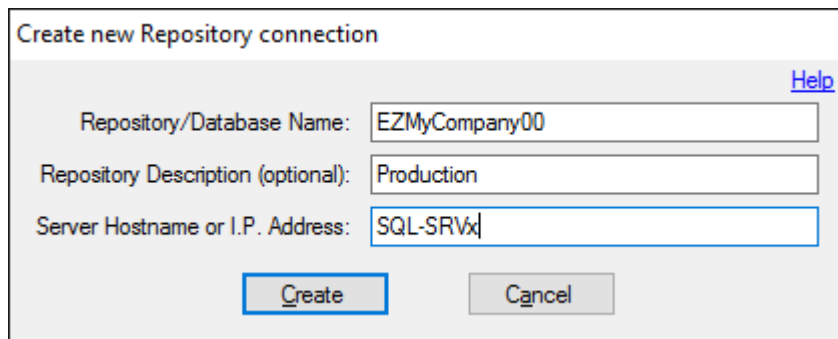
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L1 – Connecting to an EZ-Compliance Repository:


- a. After launching EZ-Compliance you will be prompted to either create a new Repository connection or select an existing one. If you have already created a single connection, you will be automatically connected to it.



- b. Using the Repository Database Selector dialog, select the appropriate database. If none are available or you want to create a new one, press the Add button. Ask your system Administrator for the appropriate information.

The screenshot shows the 'Create new Repository connection' dialog box. It has a 'Help' link in the top right. The dialog contains three text input fields: 'Repository/Database Name:' with the value 'EZMyCompany00', 'Repository Description (optional):' with the value 'Production', and 'Server Hostname or I.P. Address:' with the value 'SQL-SRVx'. At the bottom are 'Create' and 'Cancel' buttons.

- c. If the database authentication mode has been set the SQL Authentication, you will be prompted to enter the **SQL** ID and password to access the database.

The screenshot shows the 'Database Login' dialog box. It has a title bar with a close button. The dialog contains three text input fields: 'Database:' with the value 'EZProDb_EZ-Compliance', 'User Name:', and 'Password:'. At the bottom are 'OK' and 'Cancel' buttons.

- d. When connecting to a Repository for the first time, the dialog below could appear, prompting you to validate this Repository Database. Use the "Send Email" button to request a new validation code, required to activate the new EZ-Process Repository database. You will be contacted shortly after by email with the validation codes. Enter them at the bottom of this dialog and click Register.

Note that this validation is only required once per Repository Database and this step is usually performed by DynaFlow specialists as they perform the installation of the database so you should see this screen only in rare cases.

☒ Database/Repository Validation ×

EZ-Compliance detected that a new database was entered or an existing database was moved. To obtain a new database validation Keys, please contact DynaFlow Inc. using the Email below. A new database also need to be validated based on a maximum number of Employee/Access, provide this one within the Email text [Help](#)

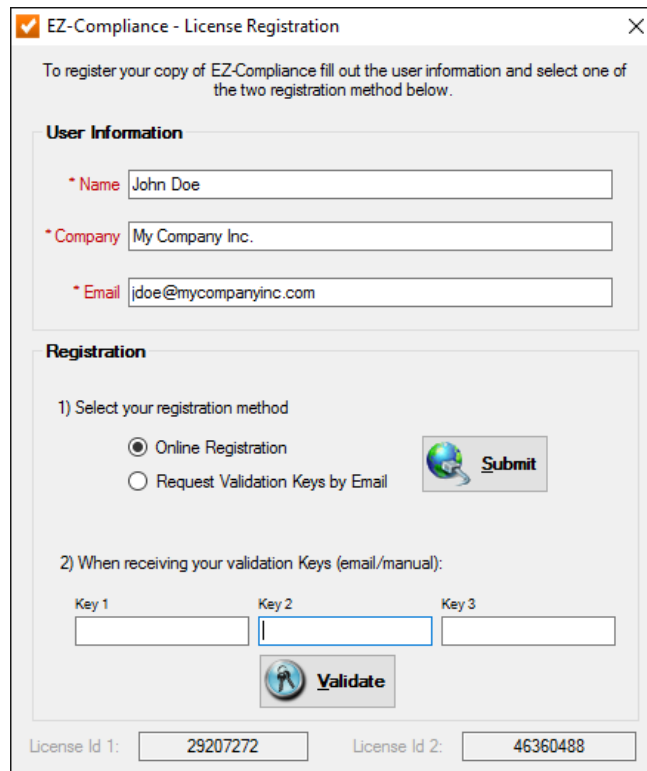
Database Code

Validation Keys

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L2 - License validation of EZ-Compliance Client:

When executing EZ-Compliance Admin Center, a validation dialog (pictured below) could be shown.



The dialog box is titled "EZ-Compliance - License Registration" and contains the following sections:

- User Information:** Three text input fields labeled "Name" (containing "John Doe"), "Company" (containing "My Company Inc."), and "Email" (containing "jdoe@mycompanyinc.com").
- Registration:**
 - Section 1: "Select your registration method" with two radio buttons: "Online Registration" (selected) and "Request Validation Keys by Email". A "Submit" button with a globe icon is to the right.
 - Section 2: "When receiving your validation Keys (email/manual):" with three text input fields labeled "Key 1", "Key 2", and "Key 3". A "Validate" button with a key icon is below them.
- License Ids:** Two text input fields at the bottom labeled "License Id 1:" (containing "29207272") and "License Id 2:" (containing "46360488").

Enter the user information in the first 3 fields of this dialog window, and press "Online Registration" or "Send by Email". Pending the Email setup properly configured in the EZ-Compliance "Environment Settings", an Email will be sent to Dynaflow requesting a validation keys to be supplied to enable the new license. The user will receive back (to the Email address provided in the second field) the License Validation Keys to be entered in the bottom part of this window.

Notes:

1. Make sure to include all characters/digits, including possible "-" (minus sign).
2. Verify that your system date corresponds to the received email date.
3. After licensing is completed this dialog should not appear any more.
4. This licensing is applied to the current Computer, not to the User. A new installation and licensing will be required if the PC hardware is changed.
5. If the received license is a temporary one (limited-time basis), this screen will be shown again once the deadline date is reached.

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L3 – EULA

In order to continue using this software you need to read and agree to the End-User License Agreement. Once read and agreed, this screen will not be shown again.

EZ-Compliance - License Agreement

Terms and conditions for using this software.

Please read the following license agreement. Use the scroll bar to view the rest of this agreement.

[This End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity or corporation) and DynaFlow Corporation or based on where you deploy the software products one of its affiliates for the software product(s) as identified in the applicable Order Form which may include:

- EZ-Publisher (and related optional modules)
- EZ-Modeler (and related optional modules)
- EZ-Workflow (and related optional modules)
- EZ-Compliance (and related optional modules)
- EZ-Book (and related optional modules)
- EZ-BPR (and related optional modules)
- EZ-Librarian (and related optional modules).

These components include computer software and may include associated media, printed materials, "online" or electronic documentation, and Internet-based services ("Product"). An amendment or addendum to this EULA may accompany the Product. YOU AGREE TO BE BOUND BY THE TERMS OF THIS EULA BY INSTALLING, COPYING, OR OTHERWISE USING THE PRODUCT. IF YOU DO NOT AGREE, DO NOT INSTALL OR USE THE PRODUCT.

1. GRANT OF LICENSE.

Subject to the terms and conditions of this agreement and the applicable order form, DynaFlow grants you the following perpetual (unless otherwise specified in the order form), non-exclusive, non transferable rights (without the right to sublease, sub license or outsource).

Installation and use of Server Components as identified in the applicable order form and which may include:

- EZ-Workflow Online Worklist
- EZ-Publisher Web-Navigator Portal
- EZ-Compliance Portal
- EZ-Book Online Generator
- EZ-Librarian Search Engine

The above Server Components are licensed based on "Named Server Computer". Unlimited users can access these Server Components via a browser connection (http). Content subscription licensing applies to the number of elements able to be managed by these Server Components. Consult the Content Licensing details in the Administration section of each product.

☐ I accept the terms in the License Agreement

☒ I do not accept the terms in the License Agreement

Continue

Cancel

L4 – Login

Since EZ-Compliance Admin Center is to be used mainly by Administrators it is protected by User/Password. Please ask your System Administrator to provide those credentials. If you are the System Administrator and have not yet received those credentials from Dynaflow, please contact support at support@dynaflow-solutions.com and a representative will be in touch with you shortly.

Note that, depending on the settings defined by your Administrator, this User/Password combination could be the same you use to login in Windows.



The image shows a screenshot of the EZ-Compliance Login window. The window has a title bar that says "EZ-Compliance Login". The main area features a background image of a man in a suit holding a red umbrella, with other red umbrellas floating in the air against a blue sky. Below the image is the "ez.Compliance™" logo. Under the logo, there are two input fields: "User" with the text "peter" and "Password" which is empty. At the bottom, there are two buttons: "Login" and "Close".

Upd1 – EZ-Compliance Admin Center Program Updates/Upgrades

EZ-Compliance Admin Center program updates/upgrades can be done without uninstalling the entire software. Simply perform the following steps:

1. Insure that your EZ-Compliance Admin Center application is closed and not running in background.
2. Rerun the EZ-Compliance Admin Center setup located in the directory EZ-INSTALL Folder (see point I1 above).
3. Re-launch the EZ- Compliance Admin Center.

Un1 - Uninstalling EZ-Compliance Admin Center Client

1. If this PC is not to be used in the future for EZ-Compliance or if you would like to transfer the current license to another computer:
 - Launch EZ-Compliance Admin Center and login.
 - Execute the option "De-Activate EZ-Compliance Client" in the Administration folder (administrative rights needed).
 - Locate and select the current's computer license and click Deactivate.
 - Take note of the de-activation code and keep it for future reference.
 - Close EZ-Compliance Admin Center.
2. Uninstall EZ-Compliance Admin Center on using the utility "Add/Remove Programs" (named "Programs and Features" in later version of Windows) from the Control Panel.

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