

Life Plan Cash Flow System

Installation Guide

Version 1.0

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Overview

The Life Plan Cash Flow system is software for planning financial information over a set period of time or a lifetime. The system comes in two pieces; the first a complex spread sheet that does all of the calculations, and a front end that allows easy input of the data collected from the user. Once the data has been entered automatically into the spread sheet, the finished spread sheet can be saved locally on the computer for future reference.

This manual shows in detail how to install the system. A user guide is also included with the downloadable setup ZIP file.

This installation guide assumes that you have the latest version of Microsoft Windows (version 7). If not, this manual will differ slightly depending on the version you have installed. There is support available if you need help (see the end of this manual).

Requirements

The Life Plan Cash Flow system has a minimum operating system and version of Microsoft Office to be able to run. There is also a component from Microsoft that also needs to be installed. **You may need Windows administration rights for the installation to be successful. Please speak to your administrator if you do not have these rights.**

The following are the supported versions of Microsoft Windows that the system requires to be able to run:

- Microsoft Windows 7 (SP1+)
- Microsoft Windows Vista (SP2+)
- Microsoft Windows XP (SP3+)

The letters 'SP' inside the above brackets means a Windows Service Pack. Service packs are released by Microsoft for all operating systems to allow the fixing of bugs and security issues in their software. For the system to run, you will need to have at least the version of the service pack specified installed on the computer you are installing the system on. The service packs can be downloaded via the Windows Update application in Windows or via the Google search engine.

The following are the supported versions of Microsoft Office. You may need to only install Microsoft Excel that comes as part of Microsoft Office to run the system. There is a trial on the Internet provided by Microsoft, which can be found by searching 'Microsoft Office trial' into the Google search engine.

- Microsoft Office 2010
- Microsoft Office 2007

Once a supported version of Windows has been installed, and a supported version of Microsoft Office has been installed, you are nearly ready to start the installation process.

Register Account

To be able to download and install the system, you must first register an account. This account will allow you to trial the software for free for 30 days. Once the trial period has expired, you will need

to enter the account details that you provided when registering to continue using the software. The software will be disabled until you have successfully renewed the license.

To register an account and start your trial, please visit the following web page:

<http://www.lifeplancashflow.co.uk/Pages/Trial.aspx>

You will be required to enter the following details into the trial page:

- Title
- Forename
- Surname
- Address Line 1
- City
- Post Code
- Office Phone Number
- Email Address
- Strong Password

You must make sure the email address is valid, or your subscription will not work. Once you have registered an account, you will be redirected to the following web page:

<http://www.lifeplancashflow.co.uk/Pages/Download.aspx>

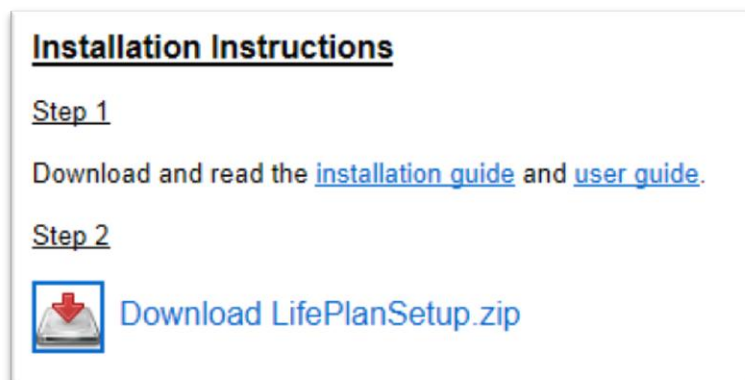
This page contains a brief summary of the steps you must take in order to run the system. These steps are included in detail in this installation guide. If they are not followed, the system will not work.

The next step is to download the setup ZIP (compressed) file.

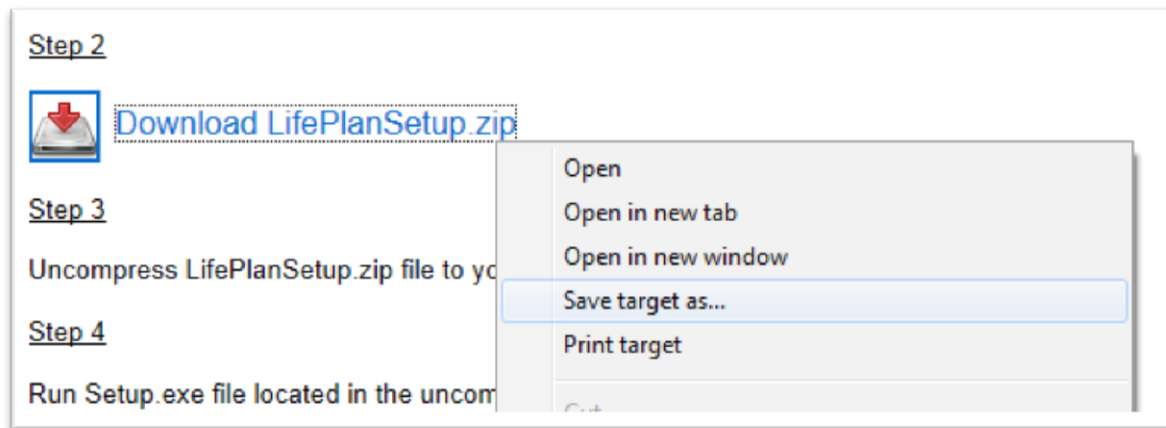
Download Setup ZIP File

Once you have registered an account on the trial web page, you must download the setup ZIP file. A ZIP file is a compressed file that contains one or more files. This is done for reducing the overall size of the setup file, and to group many files into one. This manual assumes that your browser of choice is Microsoft Internet Explorer version 8 or above.

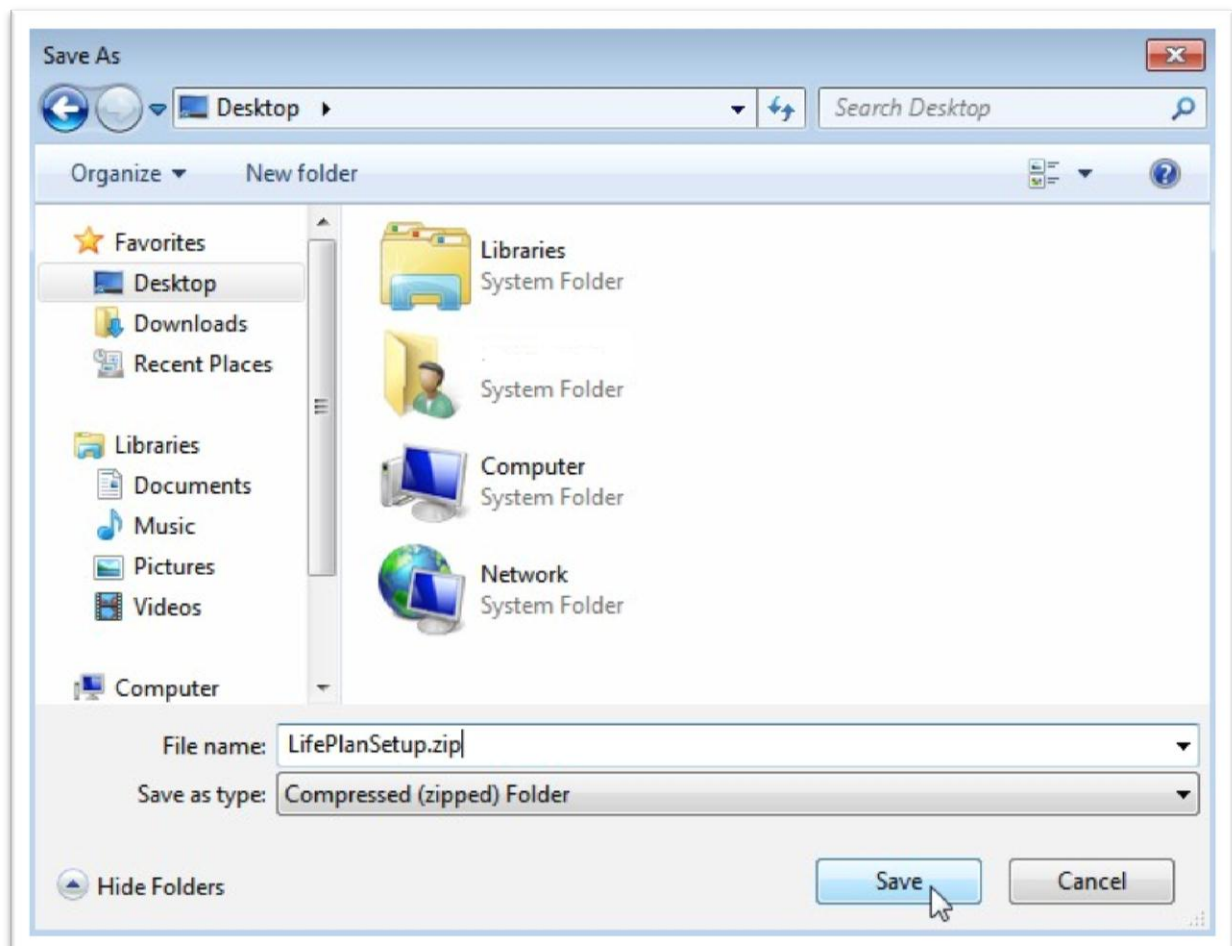
Once you are on the download page, you will see the following text:



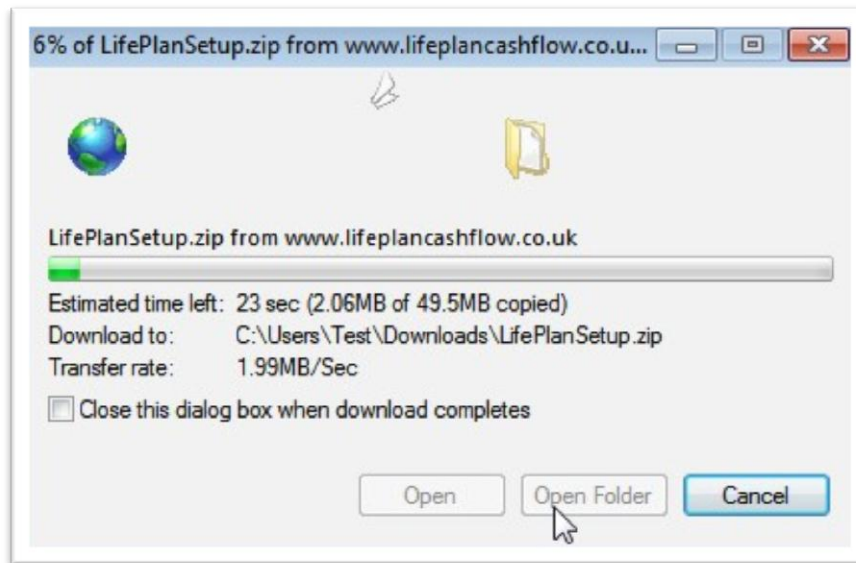
Using your mouse, right click the 'Download LifePlanSetup.zip' link and select 'Save target as'.



You will be presented with a 'Save As' dialog box, where you need to select the destination folder of your Windows Desktop. Please leave the filename as 'LifePlanSetup.zip'.



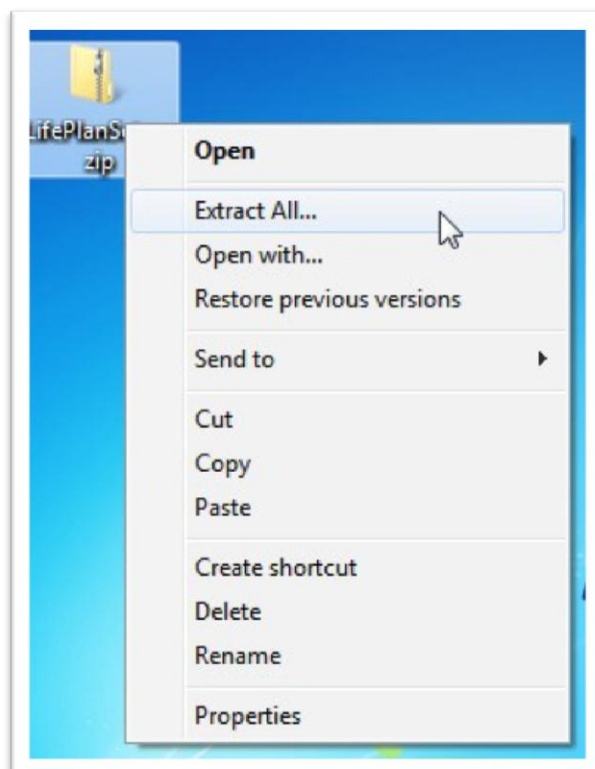
Once you have selected the location and clicked the 'Save' button, Internet Explorer will download the setup ZIP file to your desktop. This may take a while depending on your Internet connection.



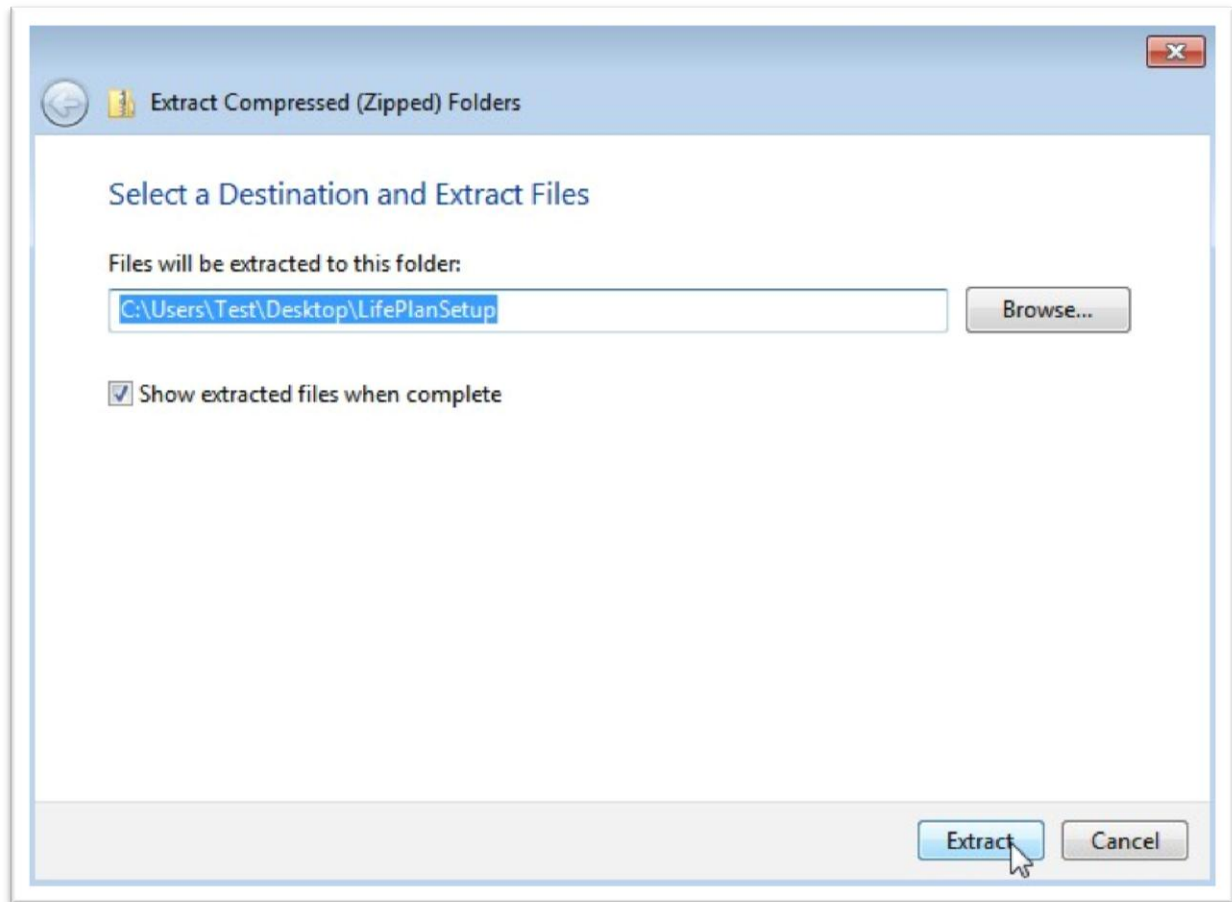
Extracting Setup Files from ZIP File

You will now have the setup ZIP file saved on your desktop. The next step is to uncompress the setup ZIP file into a folder of its own, so you can access the setup files and install the system. Minimize all and any open windows to reveal your desktop. Locate the setup ZIP file that you have just downloaded.

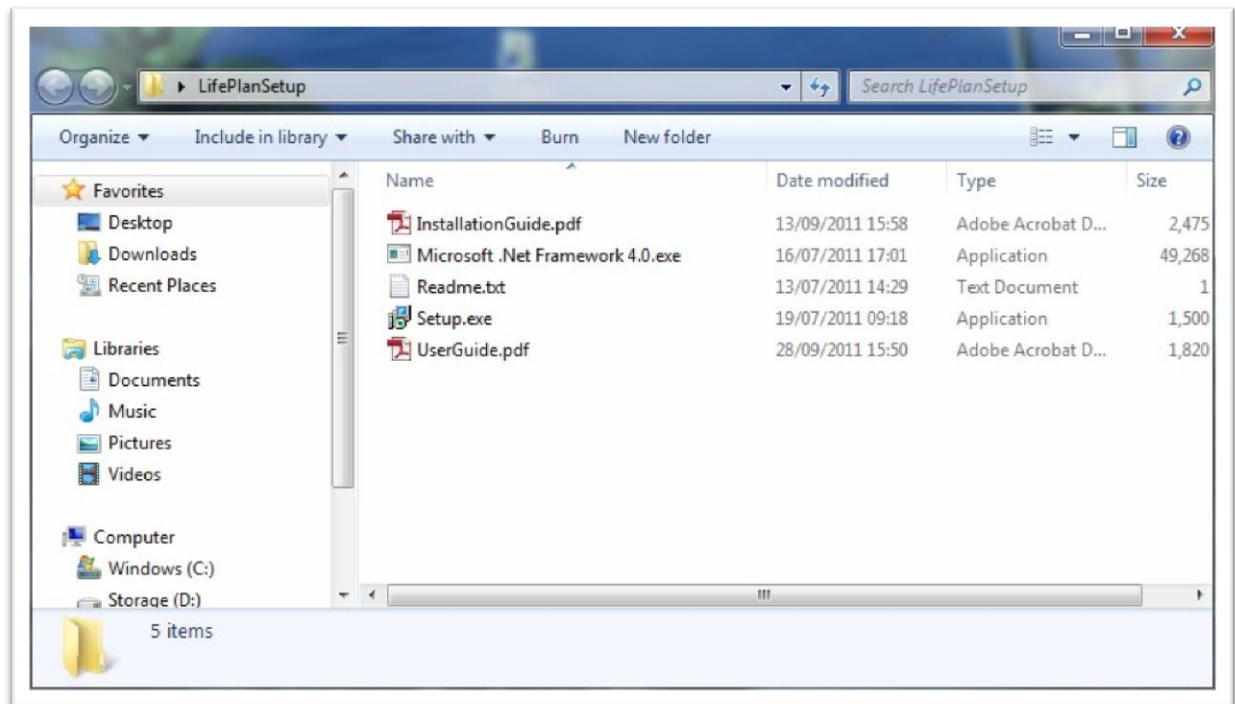
Once you have located the setup ZIP file (LifePlanSetup.zip), right click on the file and choose 'Extract All'.



A new window will appear that allows you to follow a wizard and extract the setup ZIP file to its own folder.



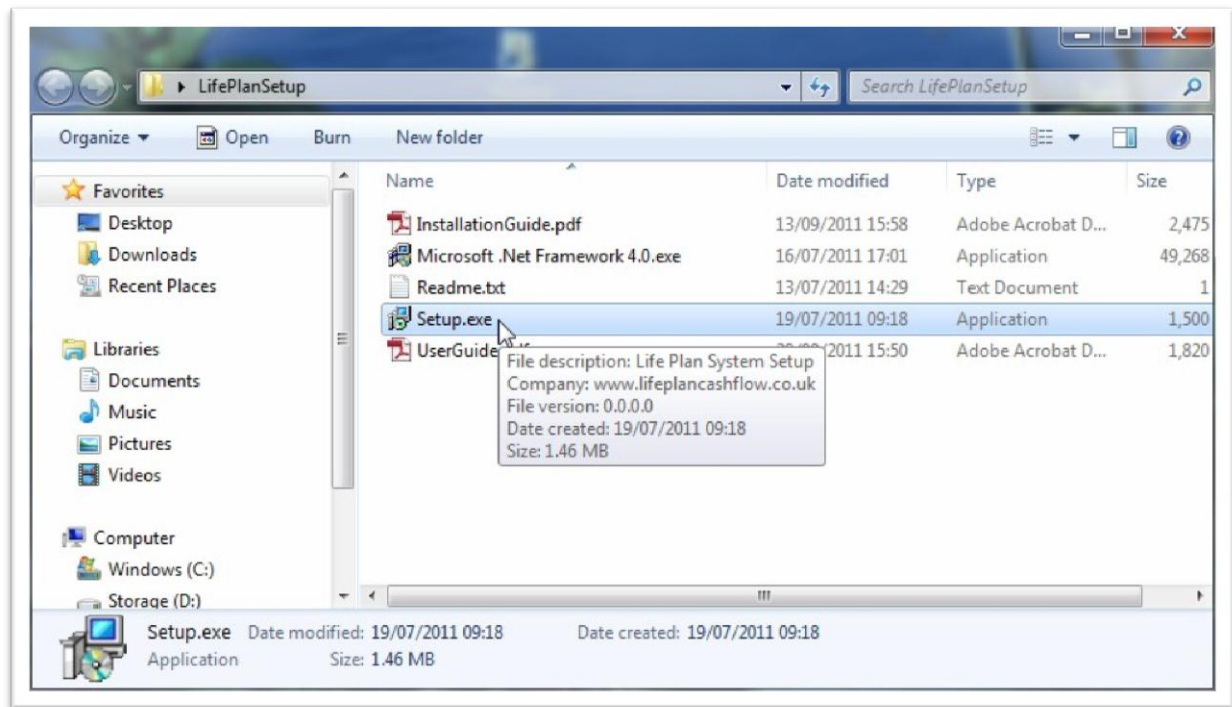
Once the files have been extracted, the new folder will appear called LifePlanSetup. Double Click on it, and your screen should look similar to this:-



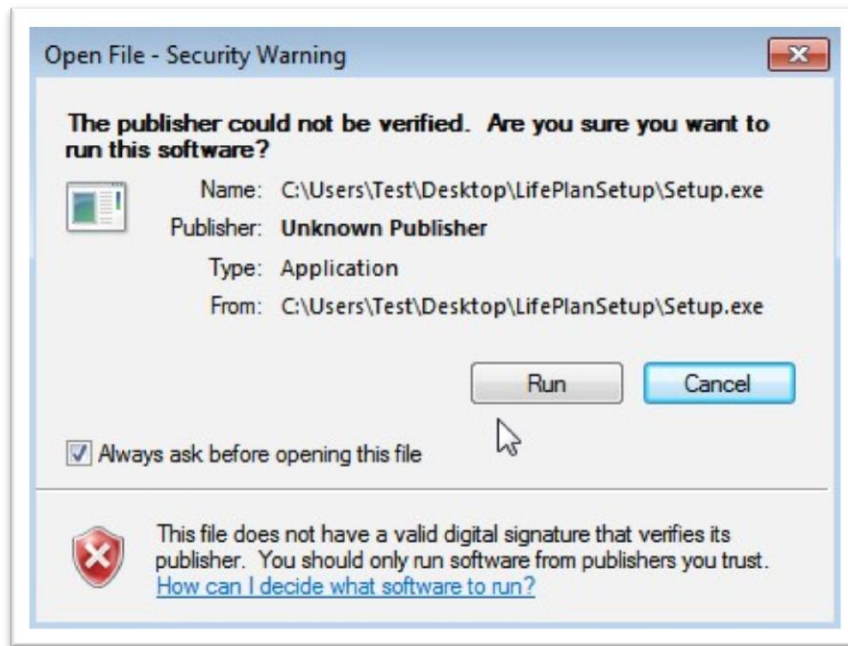
You are now ready to continue the setup process. You may find that you need to install windows updates in order for the system to be installed and work properly if this becomes apparent please follow the "Installing Windows Updates" instruction in the appendix of this report.

Installing Life Plan Cash Flow Software

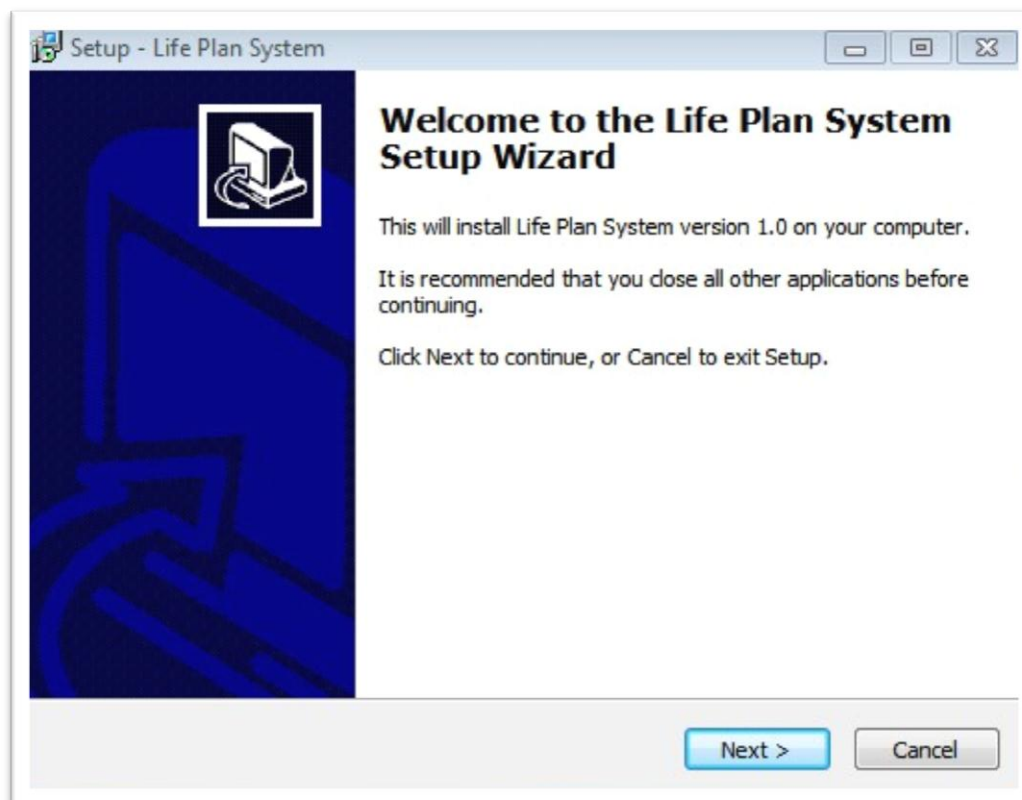
The first stage of the Life Plan Cash Flow software installation is to install the main software. Open the 'LifePlanSetup' folder that is on your desktop. There is a file in there called 'Setup.exe'. This is the main setup file for the system. Double click the 'Setup.exe' file. The installation process will then start. You will again need administrator rights to do this.



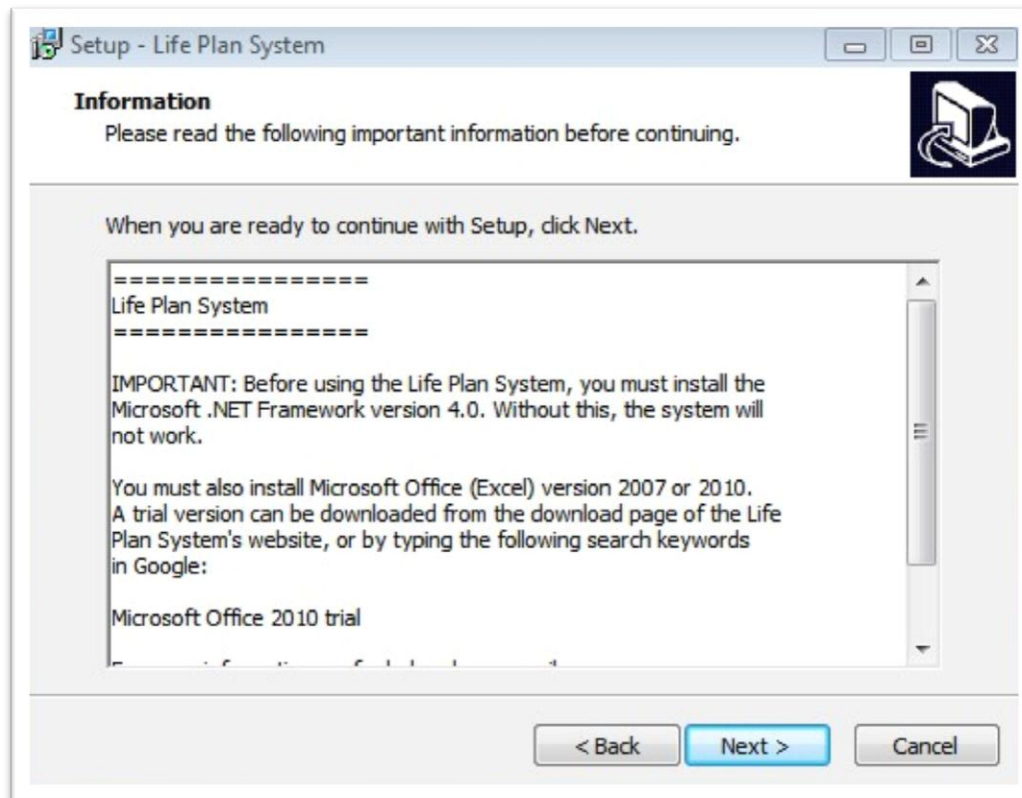
The 'Setup.exe' file will now start. You will be asked whether you would like to run the application. This is a security feature of Windows. Click the 'Run' button. **You may be warned that you do not have the Microsoft .NET Framework 4.0 Client Profile installed. If this is the case, please refer to the appendix of this document for how to install the required component.** If not, please continue with the installation.



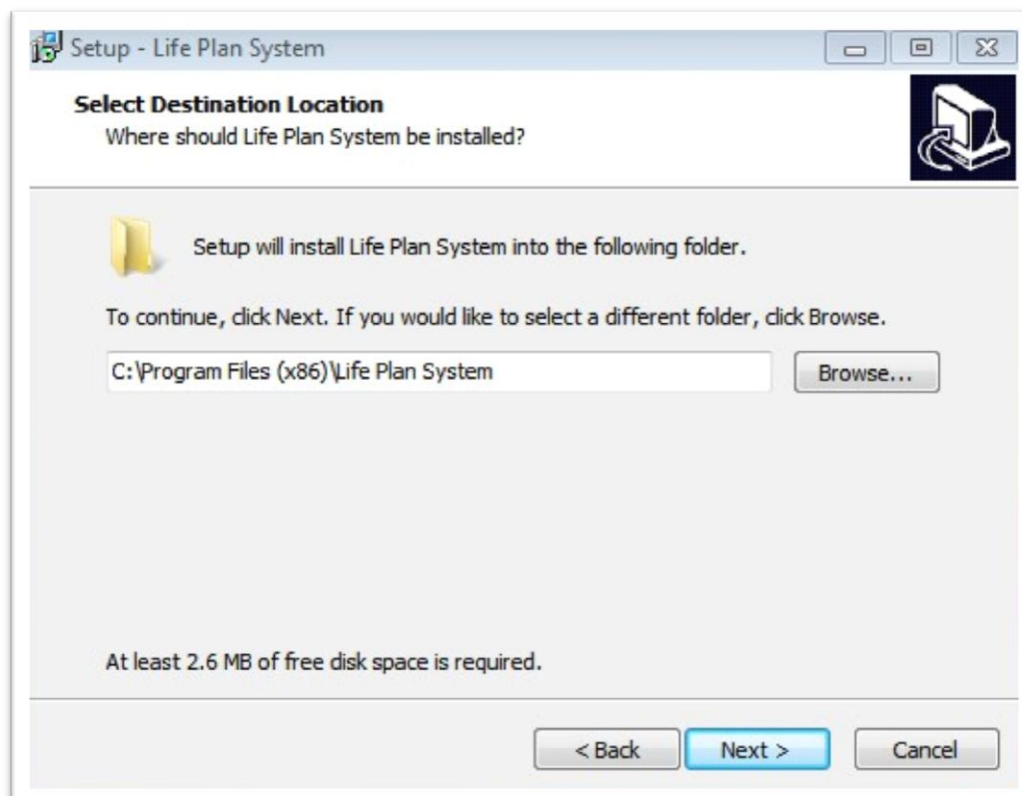
When the setup wizard loads, click the 'Next' button.



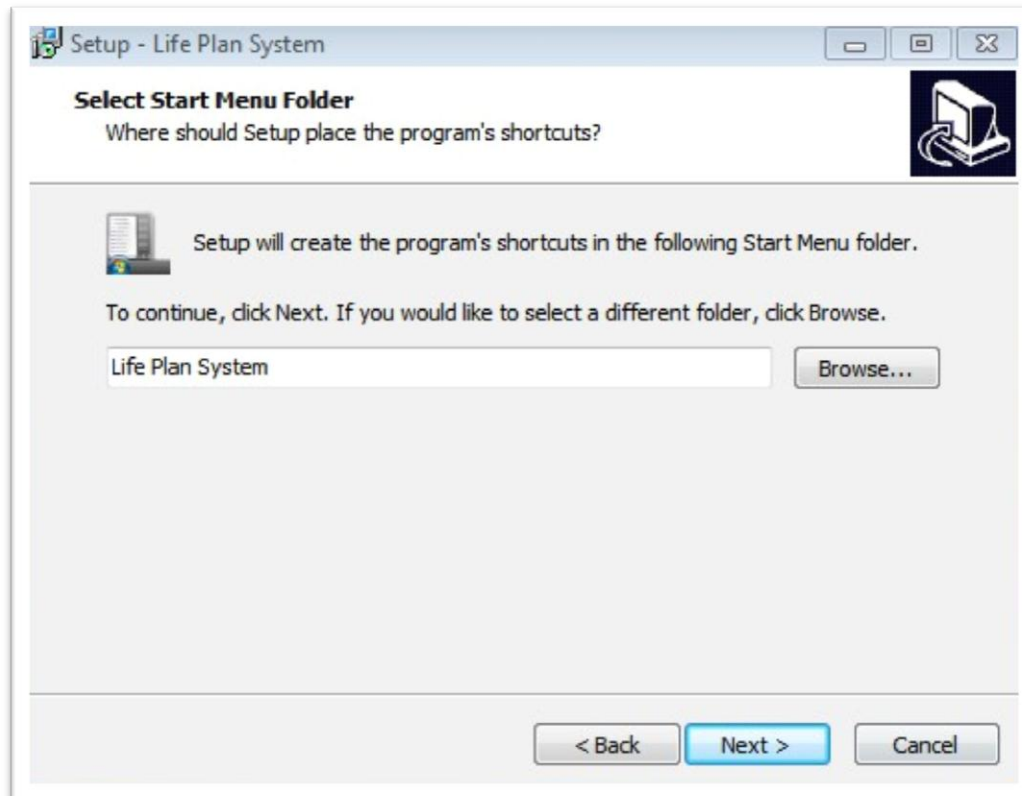
Important information is then displayed. Click 'Next' to acknowledge that you have read it.



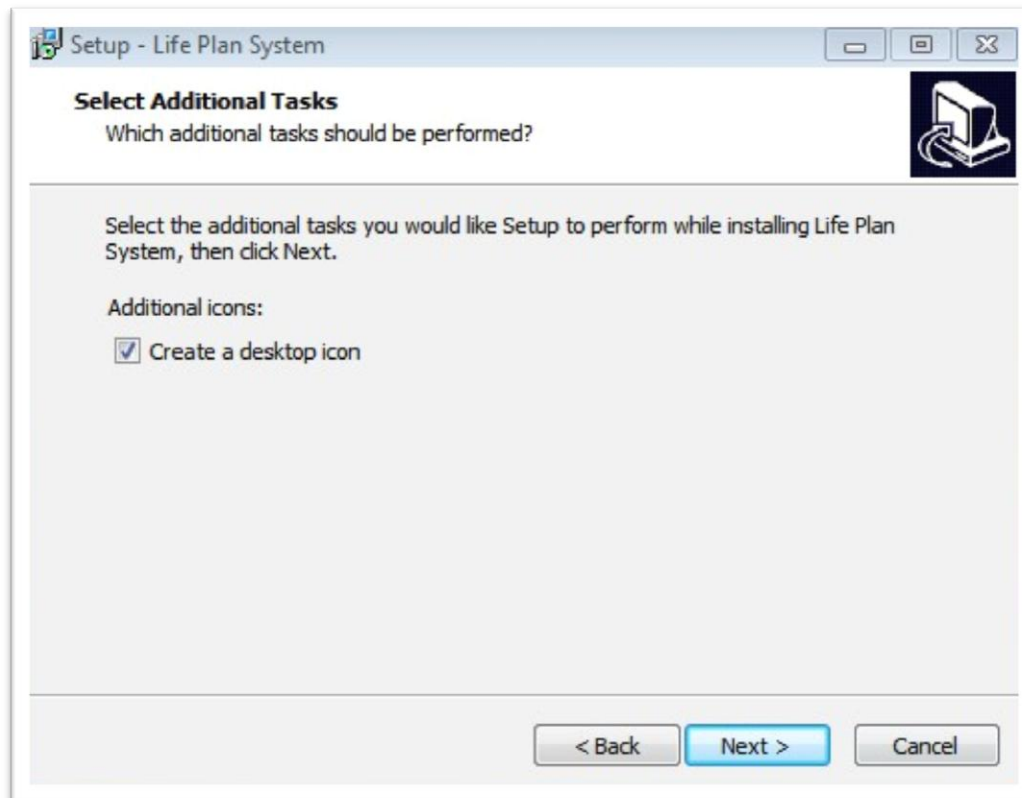
You can install the system anywhere you wish, but it is highly recommended that you do not change the path and accept the default. The folder may look different if installed on a 32bit version of Windows, rather than 64bit.



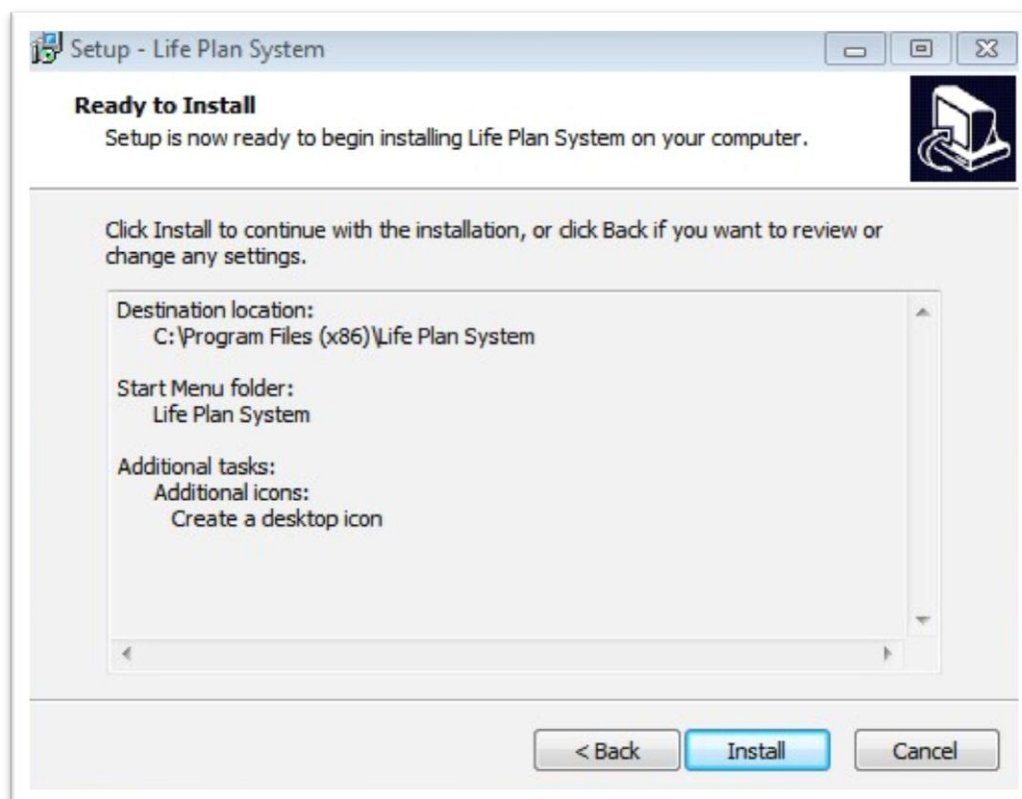
The Life Plan Cash Flow system will install icons into the Windows Start menu. Accept the default and click 'Next'.



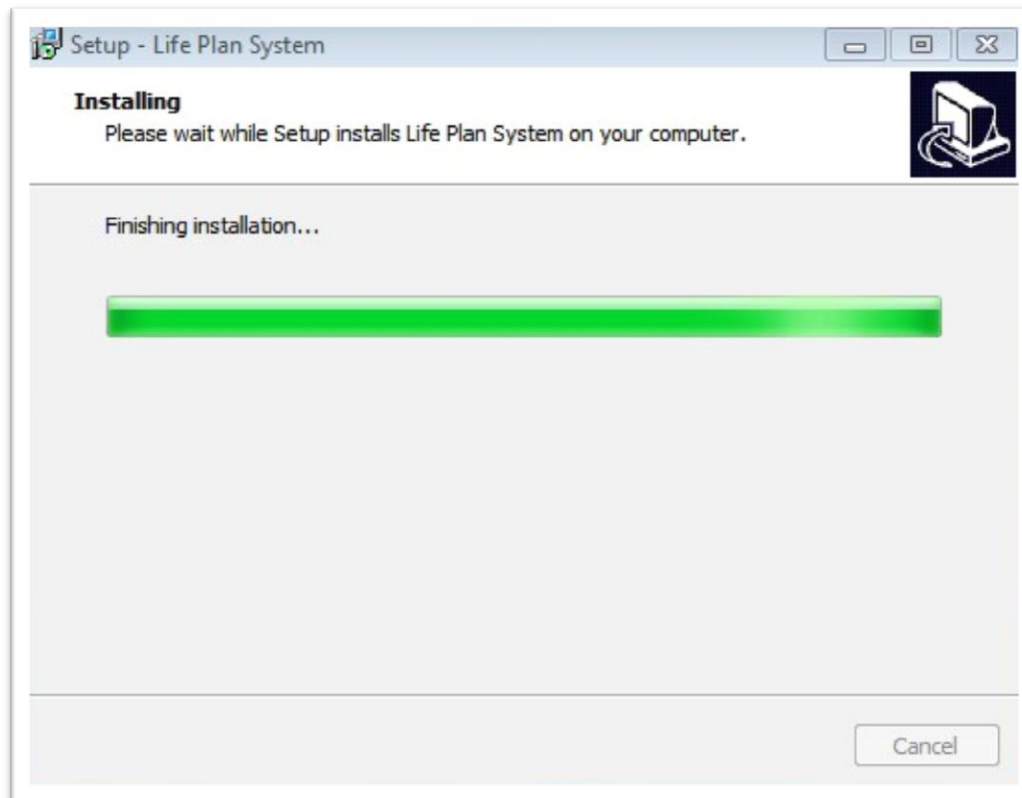
Leave the checkbox to 'Create a desktop icon' checked, so you can easily locate and run the system.



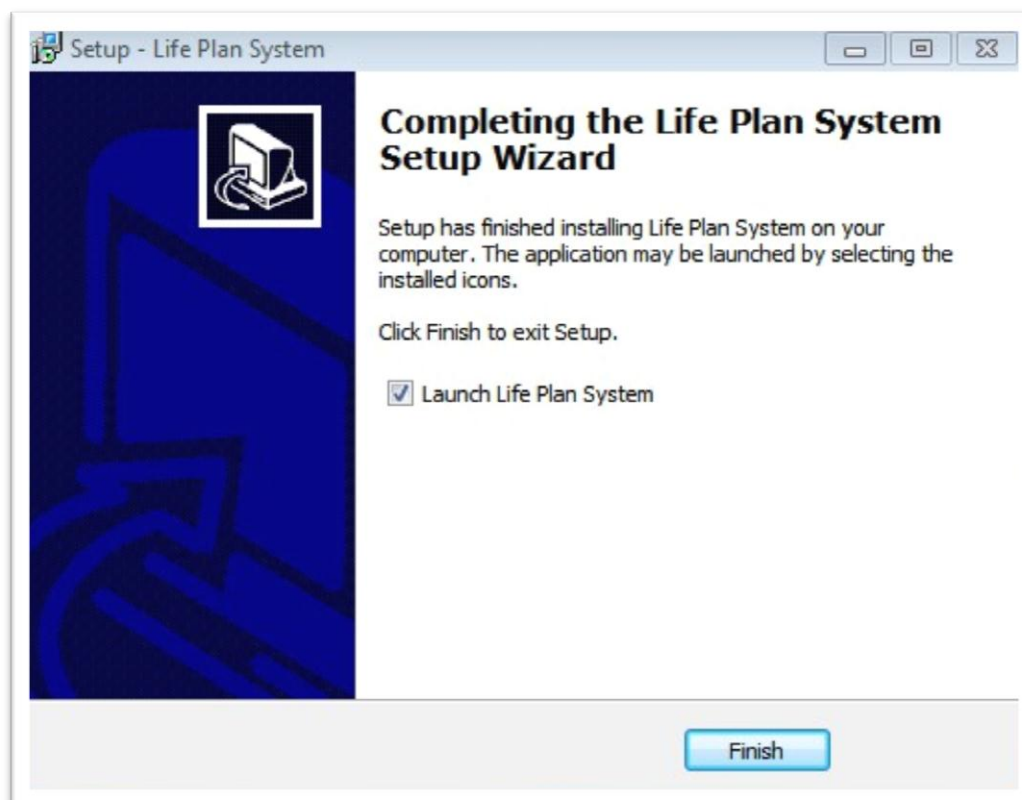
Confirm the 'Ready to Install' page by clicking the 'Install' button.



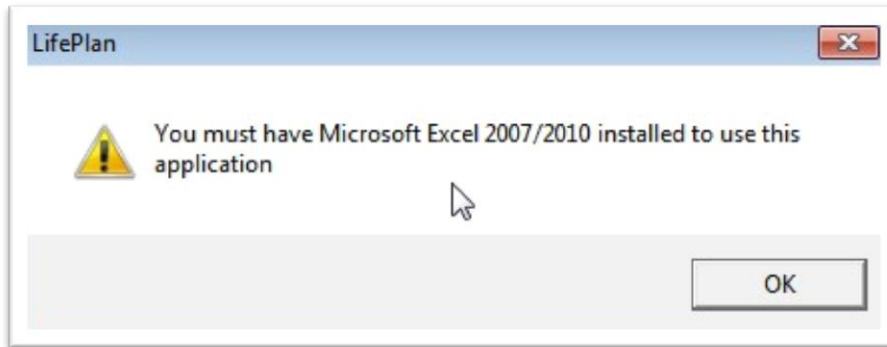
The system will now start to install onto your computer.



Once complete, you can leave the 'Launch Life Plan System' checked, so that once you click 'Finish' it will start the Life Plan Cash Flow system.



If you forgot to install Microsoft Office 2007/2010, an error message will display. You cannot continue and use the system until this has been installed. Please make sure your version of Microsoft Windows and Microsoft Office are registered and activated.



Running Life Plan Cash Flow System

Once the setup has completed, a new icon will be added to your desktop. This icon is the quickest way to run the Life Plan Cash Flow system. Double click this icon to load the system.



User Support

If you need any support for the installation/use of the Life Plan Cash Flow system, please get in touch with the support team by phone or by emailing:

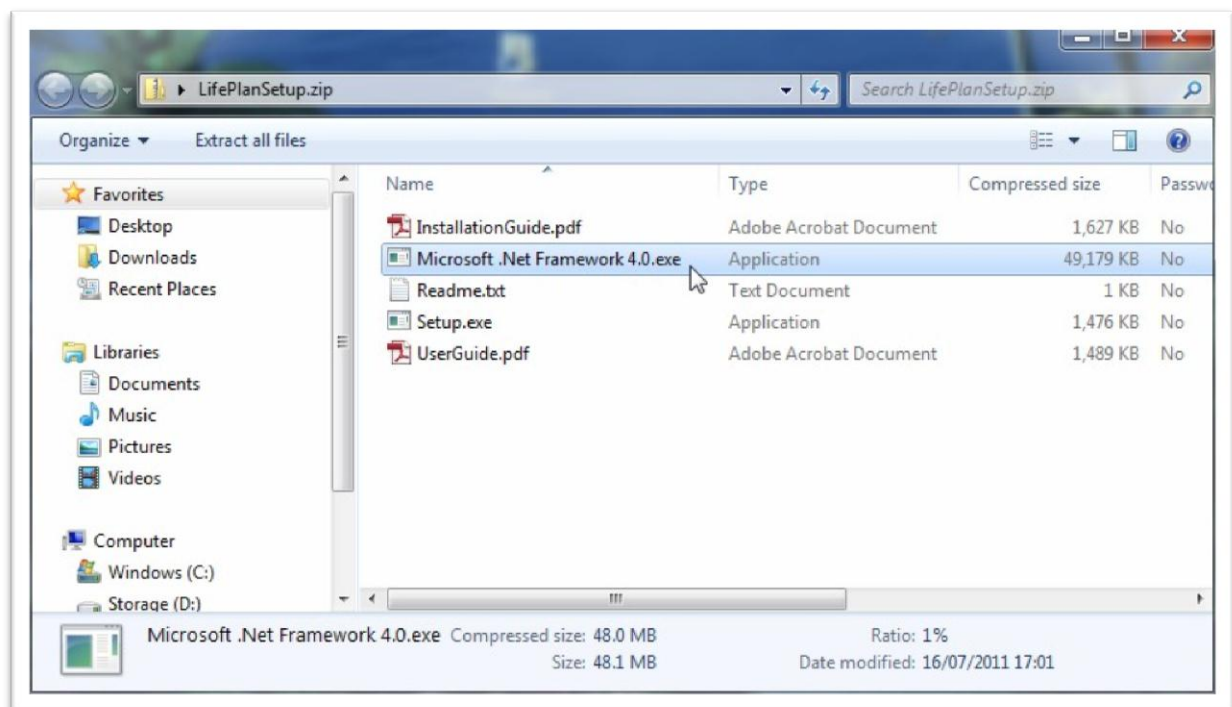
support@lifeplancashflow.co.uk

Appendix

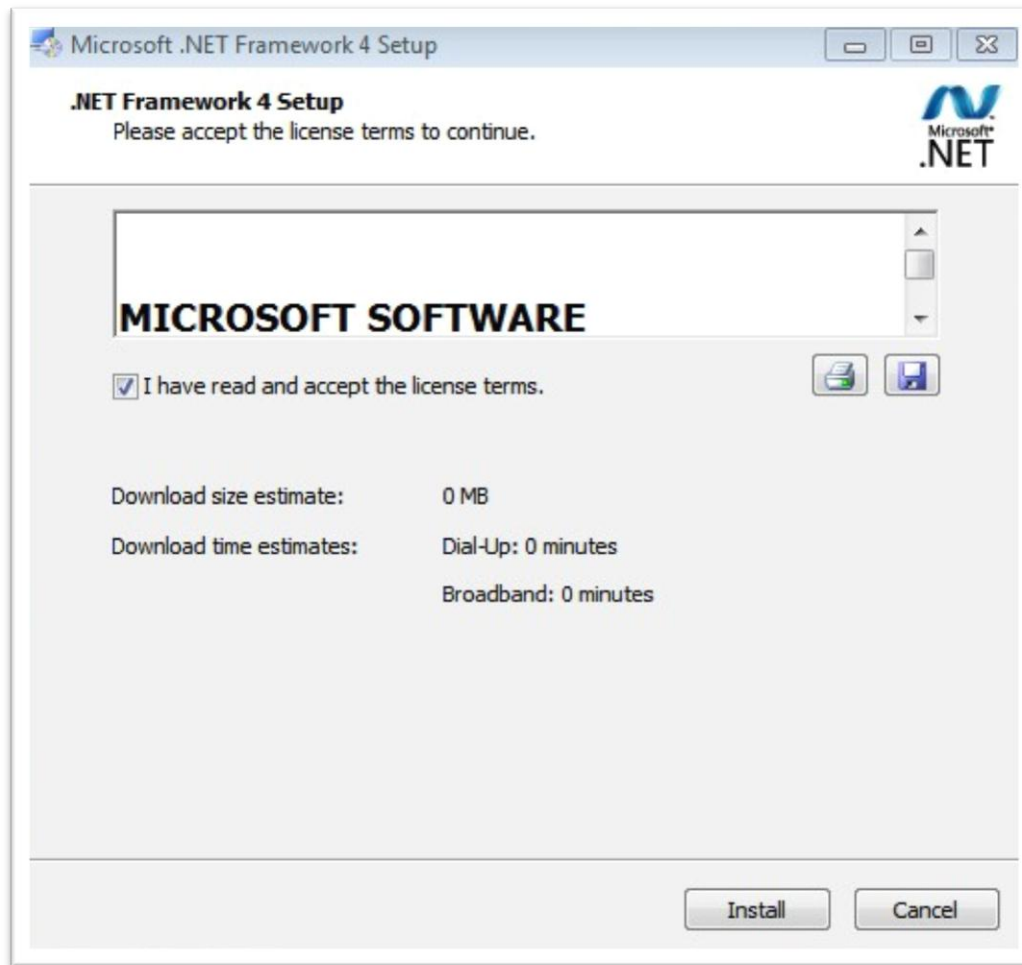
Installing Microsoft .NET Framework

If you have been warned by the setup installation that you do not have the Microsoft .NET Framework installed, then please follow this section and install it. You must install the Microsoft .NET Framework, which is a library of code and tools used by the developers who designed and built the Life Plan Cash Flow system. It is required to be installed on the local machine when running the system. This must not be skipped as the software will not work without it.

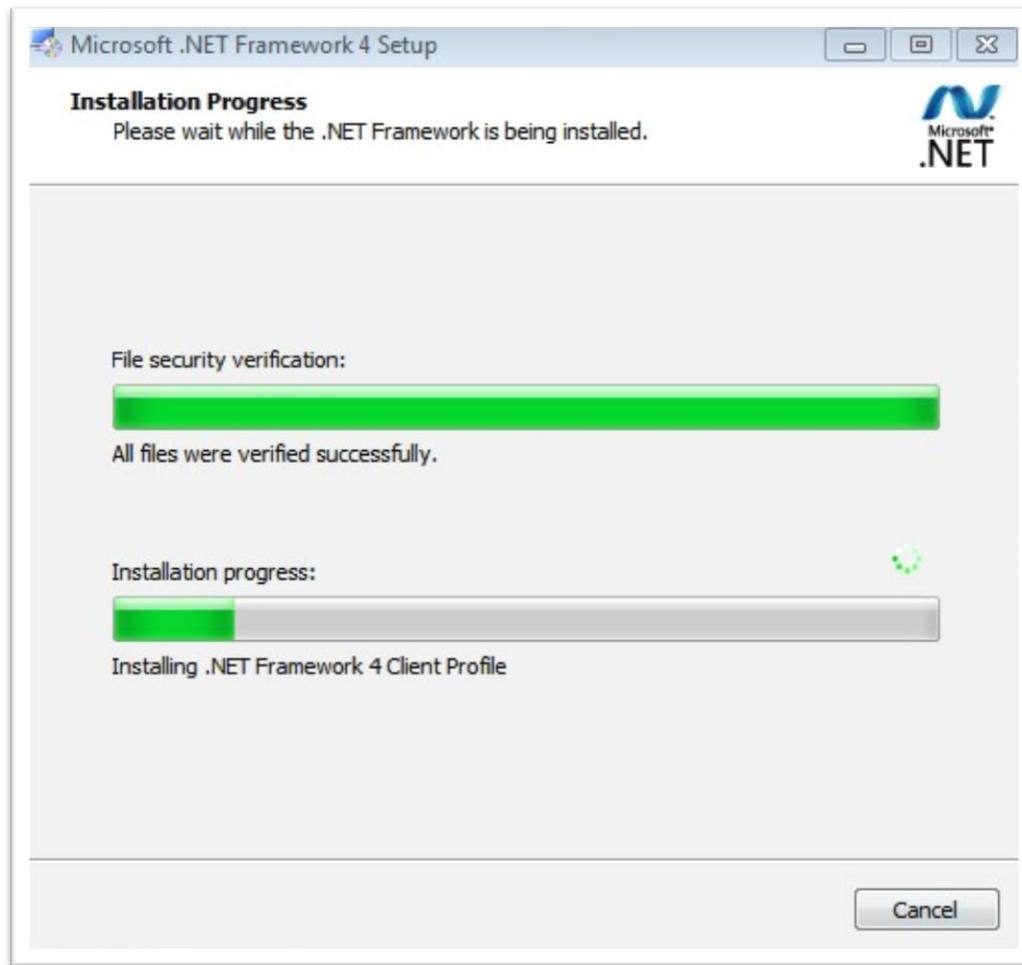
The Microsoft .NET Framework version 4.0 setup file is included in the 'LifePlanSetup' folder that you created earlier. Locate this folder (on your desktop).



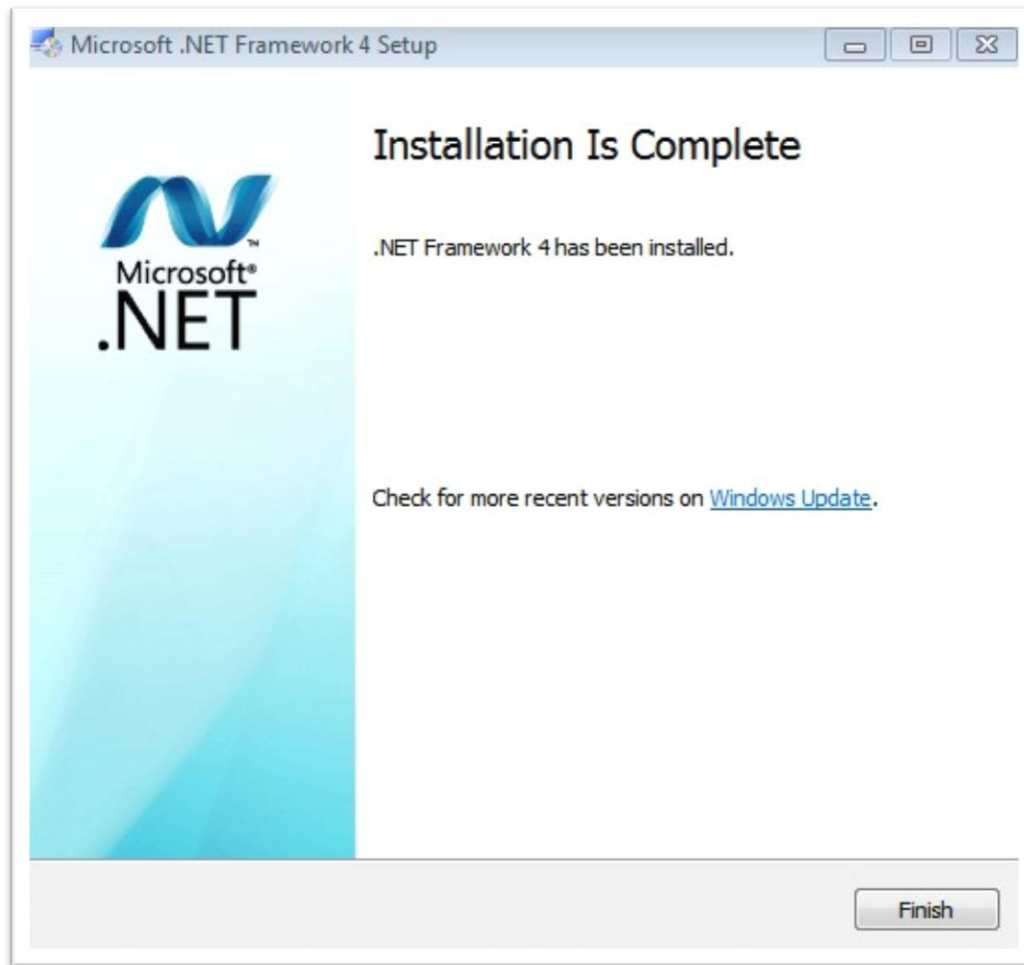
Double click the 'Microsoft .Net Framework 4.0.exe' file. This will start the installation process. You will most likely be asked to give permission for the setup file to make changes to the system. Click the 'Yes' button to continue if Windows does. The installation file will start to uncompress its files that are included and are required.



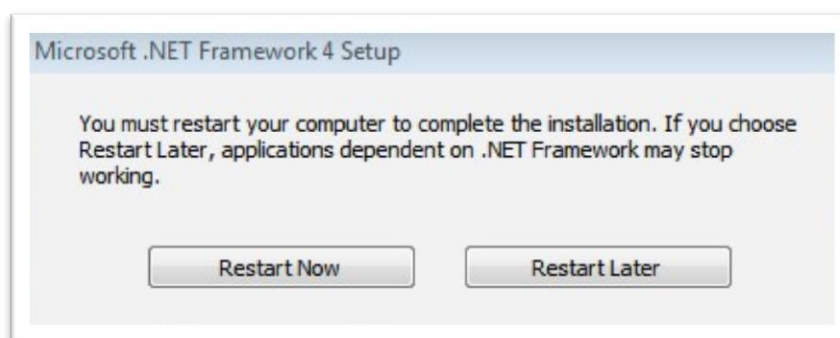
Check the 'I have read and accept the license terms' once you have read the license terms, and YOU ACCEPT THEM.



The setup and installation will continue. Please wait until the setup completes.



Once the installation is complete, you will see the above screen. Click the 'Finish' button to continue. You will now be asked if you would like to reboot the operating system. Please click 'Restart Now'. Make sure you save all of your work before clicking the 'Restart Now' button.



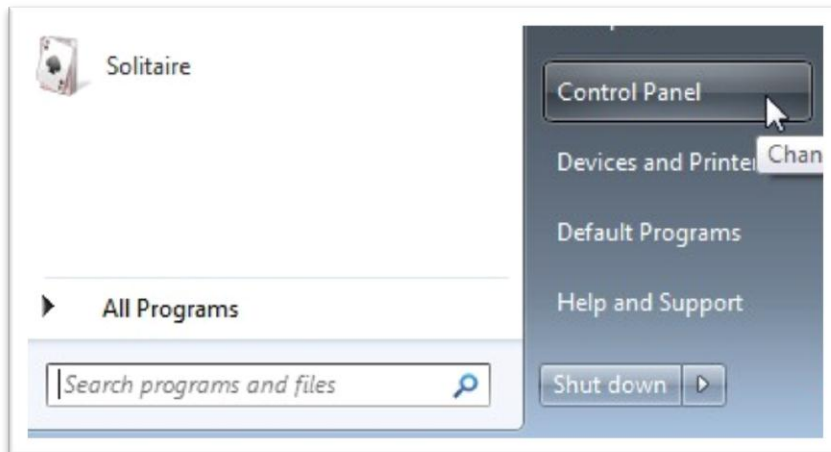
Your operating system will now reboot.

Installing Windows Updates

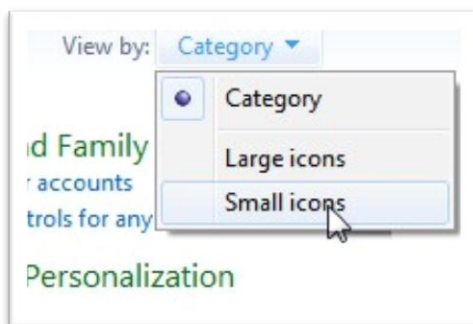
If the system does not work you will need the latest service pack and Windows hotfixes. Please follow the instructions below:-

This step requires administration privileges. Please speak to your administrator/IT department if you do not have these rights.

First click the 'Start Button' in Windows (found at the bottom left of the screen). Then click the 'Control Panel' button on the right hand side of the menu that pops up.



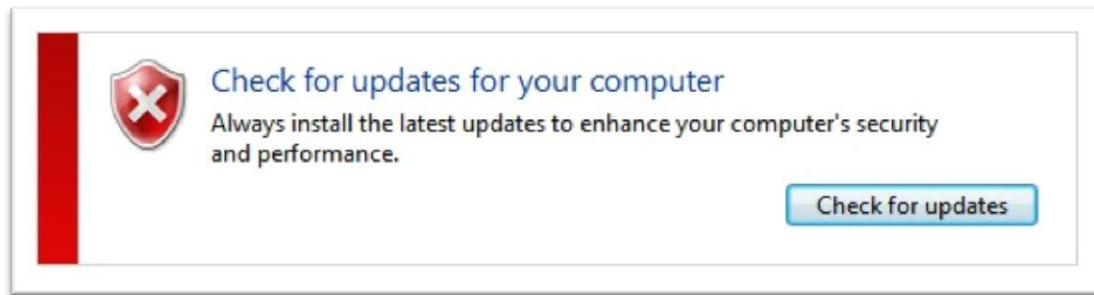
Inside the 'Control Panel' at the top right, please change the 'View by' drop down to 'Small icons'.



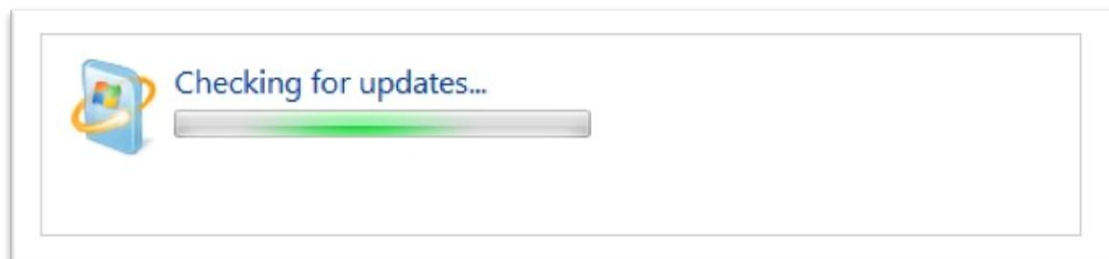
Once the 'Small icons' has been selected, you will see the 'Windows Update' link. Click this link.



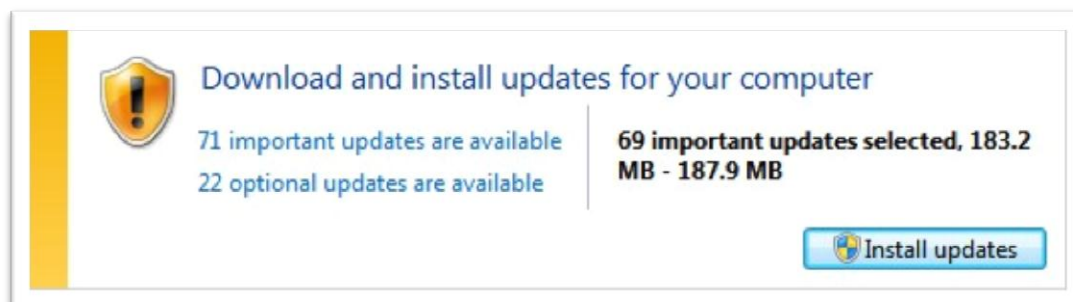
If the operating system is a clean install, you will most likely see the following:



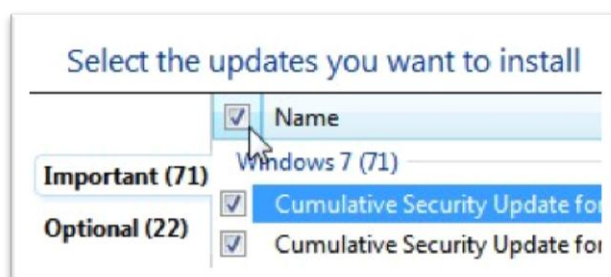
Click the 'Check for updates' button. The operating system will try and find the latest updates for your operating system.



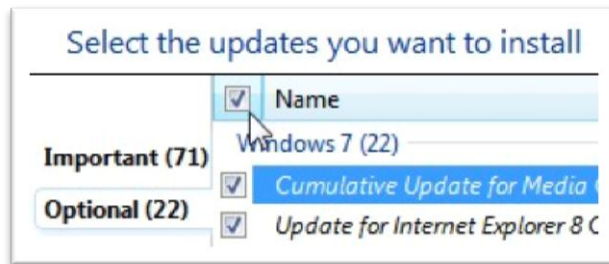
You will be presented with a window like this:



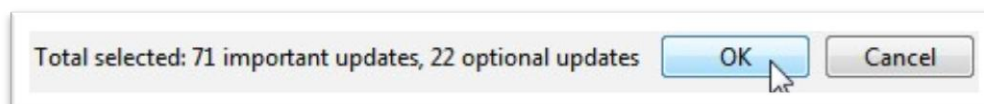
The number of updates will be specific to your system, and the date of when you checked for them. It is a good idea to install all of the Windows updates to your system. If you click the (in this case) '71 important updates are available' link, you will be presented with a new window.



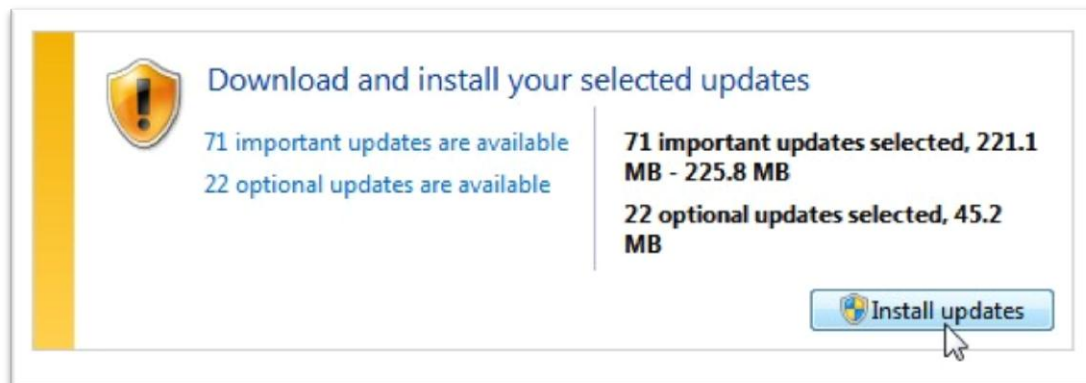
The checkbox at the top of the window needs to be checked (ticked). This will check all of the checkboxes for each Windows update. Once checked, click the 'Optional (22)' link at the top left. Make sure that the checkbox at the top of the Window is again checked.



At the bottom of the window will be two buttons. Click the 'OK' button to start updating your version of Windows.

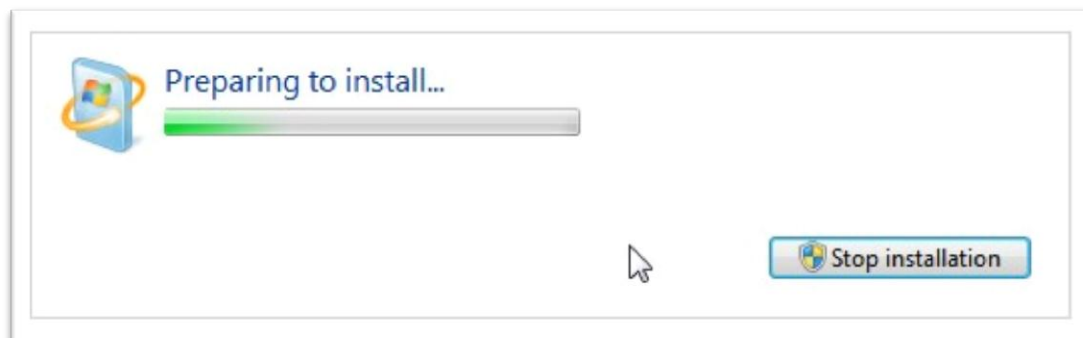


You will be returned to the original screen.

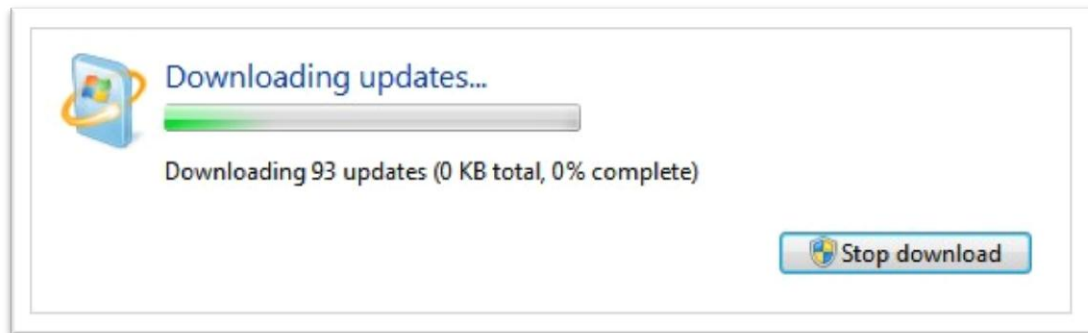


Click 'Install updates' to install all of the Windows updates. You may be presented with windows that ask for you to accept license agreements with Microsoft and others. Accept these license agreements (IF YOU AGREE with them).

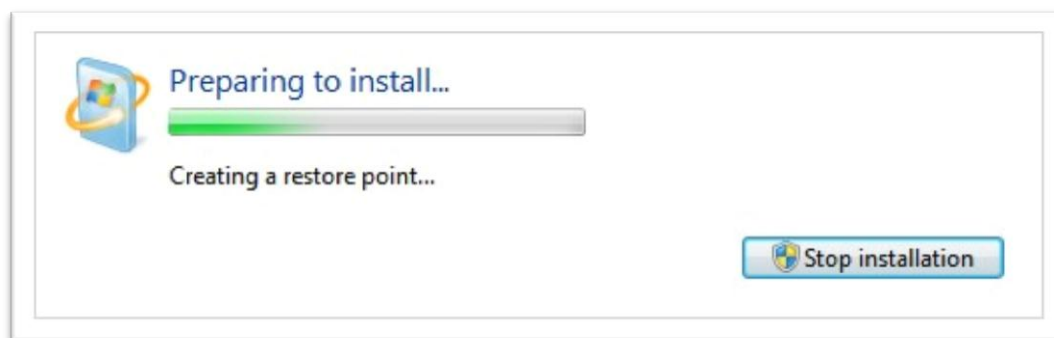
The system will prepare to install all of the Windows updates.



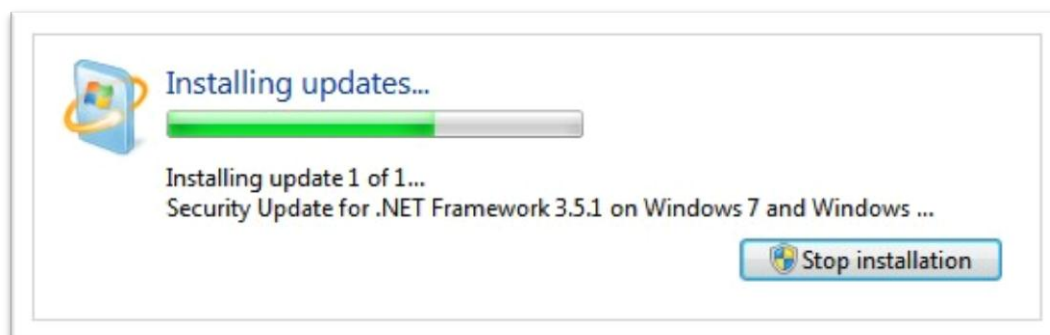
As soon as it is ready, the download starts.



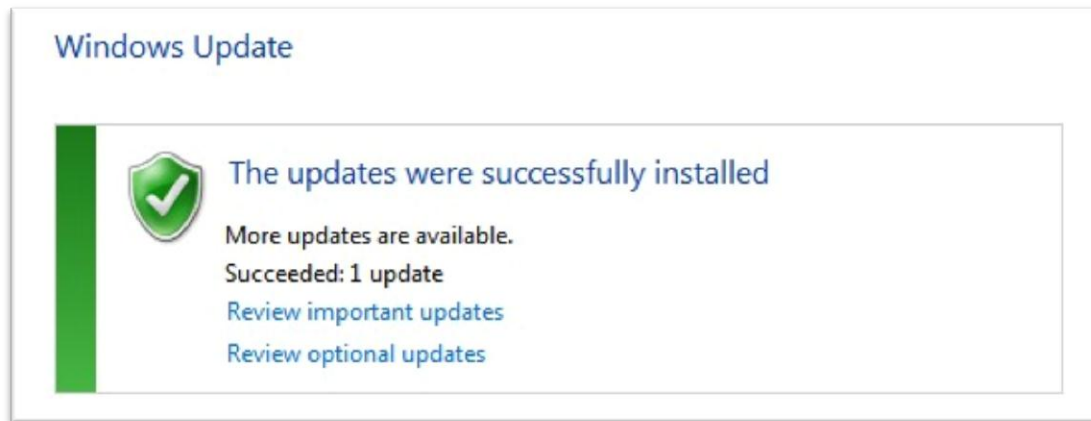
Once all of the updates have been downloaded, the operating system creates a 'restore point', in case the updates fail.



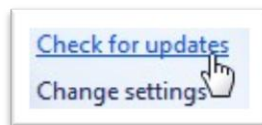
The operating system then installs the Windows updates.



When all of the Windows updates have been installed, you will be presented with the following green tick, saying 'The updates were successfully installed'.



You must now 'Check for updates' again to install any more Windows updates that could not be installed the first time you checked. This may mean checking and installing all Windows updates will take several attempts. You need to make sure you check for more Windows updates, and install them, as some of the updates have more updates to follow.



Click the 'Check for updates' link at the top left of the screen to start the process again. You may need to check and install the updates several times before your system is completely up to date.

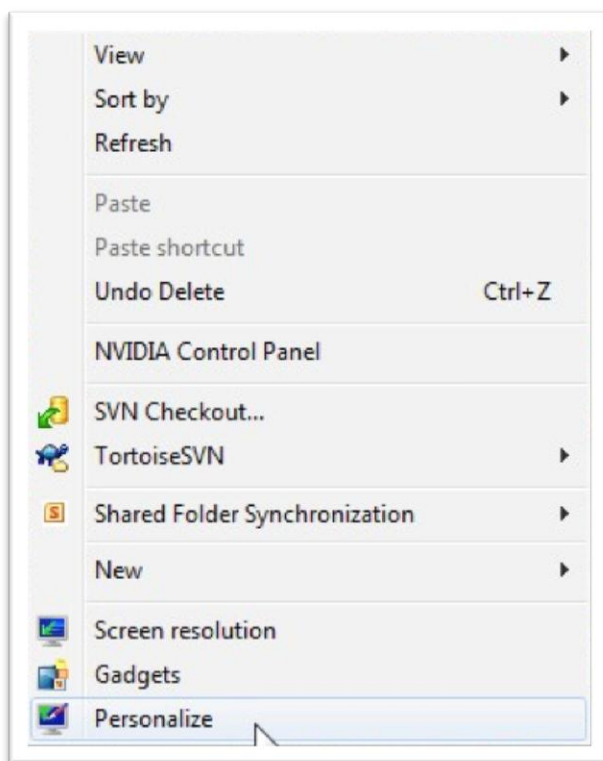
Windows Font Size Incorrect for Life Plan System

If you have customised – or your operating system has been preconfigured – to increase the size of the Windows core fonts, you must make sure that when running the system, you change the font size to “Smaller – 100% (default)”. This is a known issue with the system, and we intend to fix the problem in future releases.

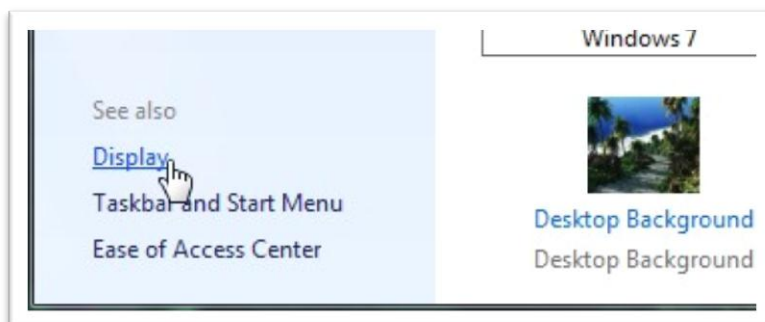
To change your font size back to the correct size for the Life Plan system, please follow these steps:

Note: You will need to log off your account in Windows once the change has been made, and then you can use the Life Plan system correctly once logged back on.

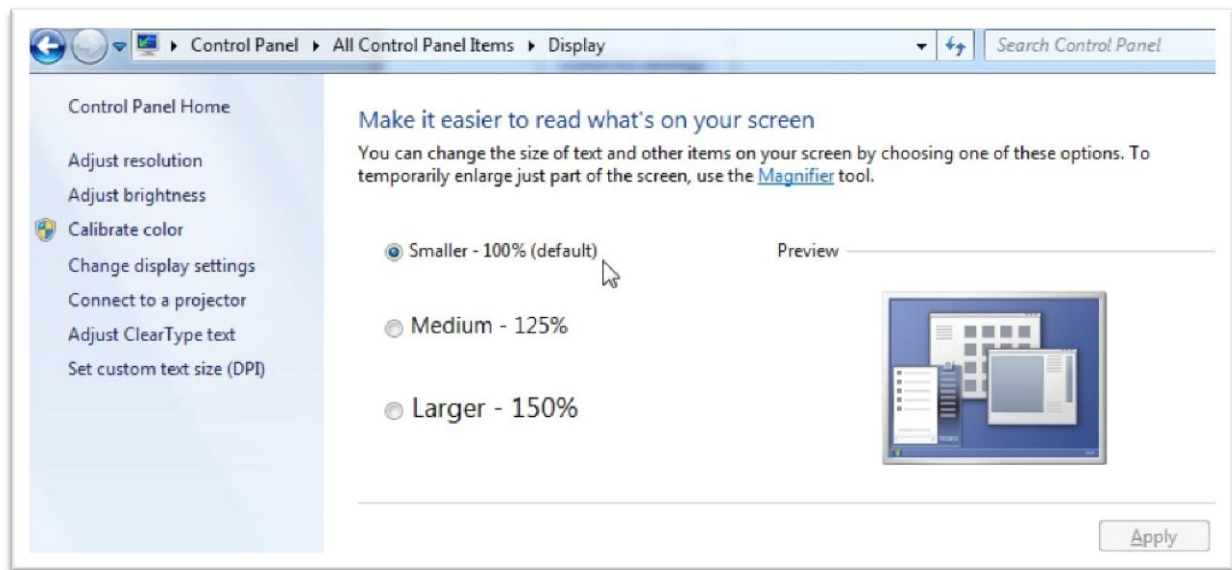
First minimize any open windows, to reveal your desktop. Right click your desktop and select “Personalize”. This will open another window that allows you to open the preferences for the Windows font size.



Once you have clicked “Personalize”, you will be presented with a new window. At the bottom left hand side of the new window, you will see the following text links:



Click the “Display” text link. You will now be presented with the following window:



Select the “Smaller – 100% (default)” radio button, and then click the “Apply” button at the bottom far right. You will be asked to log off your user account, and log back into Windows. Please do this, and when reloaded, run the Life Plan software again. All controls in the forms will now display correctly.