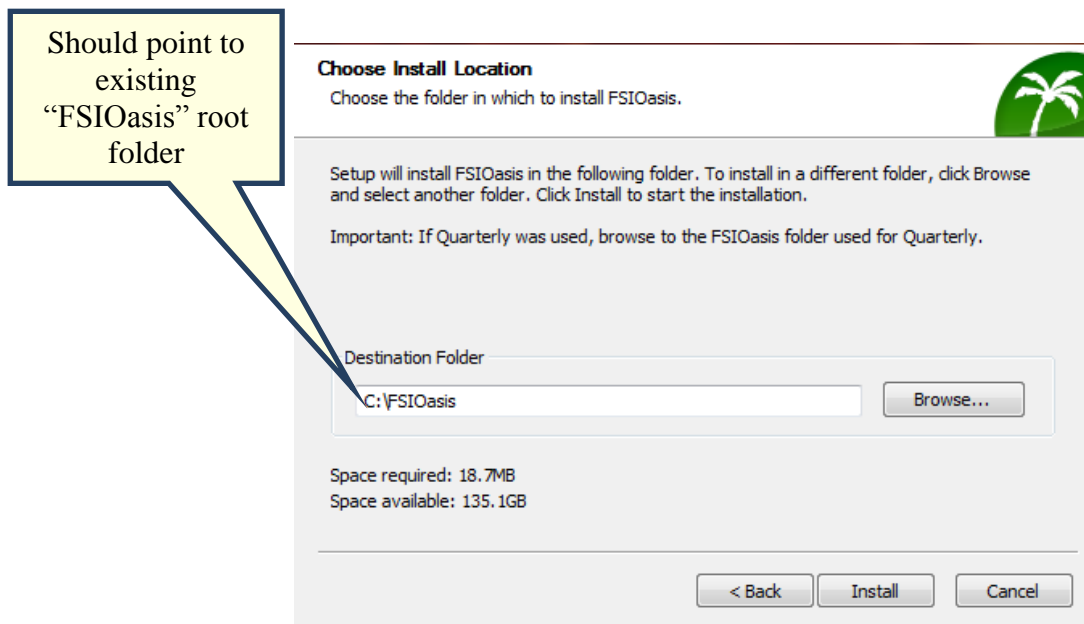


Installation steps:

If you are currently using FSIOasis you need to know its current installation location on your network or PC. The location can be found by doing the following:

Right-click the FSIOasis Icon on your desktop, and select “Properties”. In this window, on the shortcut tab, you will see a dialog box labeled: “Start In” and it will have a path. You can copy this path, as this is the Destination (Installation) folder the program will ask for during installation process.

- Navigate to the download location of the quarterly installation: “q_setup.exe” Windows Explorer and double-click the file “q_setup.exe” to install the software. Follow the steps on the screen. You can install all the available filings you need with one installation, and may repeat this as many times as you need – reinstallations will **NOT** delete any data or customer-settings.



IMPORTANT: If your company uses Citrix, proceed to the section labeled: “Citrix Installation” to continue Citrix setup. After Install is complete, un-check the “Start FSIOasis now” button. This will install the client portion on whatever machine is installing the software, which is not needed for Citrix.

Launching the application:

There is only one root application needed to run any or all the systems for any year. If you have multiple systems installed (Health, Health NY, etc.) when you run FSIOasis you will be prompted to choose which system to access.

- **First Run Setup:** To complete installation, for each system you install, there will be a “First Run” wizard to help get you started. You will first need to enter a new product key for the quarterly version. Your product key will be on the e-mail or on our website at www.fsioasis.com and login and proceed to downloads section. The next screen will give you two options; first option is “Find Prior Year Companies”. This option is used if you used a previous version of FSIOasis and have already entered your company information. FSIOasis will bring forward your company information. You may also add new companies at this stage. The second option is “Enter Company Manually”. This option is used if you are a new client or you have not entered a new company. You will then need to set up your companies for any system that did not have an annual or quarterly version.
- **Install Scheduler (Optional, recommended):** The Scheduler will allow you to run automatic updates and automate scheduled tasks. This will install the Scheduler on the computer that the software is being installed from. Installing the Scheduler is recommended – and please note that the scheduler runs as a process, not as a service. This can be changed inside the application if needed.
- **Share access to other users:** To allow other users to get access to the software, simply have them browse to the “Start FSIOasis” icon inside the “FSIOasis” folder and double-click to get started. This location is the same as the path that you installed the software to. This will walk through a few steps to allow their computer to access the software. Please note that you can have multiple copies of the software open at one time, and as many users as you need.

Citrix Installation

Inside the "Client" folder of the FSIOasis directory will be a client executable that contains the necessary files that FSIOasis needs to run. Citrix requires an executable to be accessed, but, the Client program you see in this directory is a self-extracting zip executable. This is why it is necessary to unpack the contents to a location your user's share, so Citrix can point to that location to run the program.

1.) To unpack the client the command is (using command-line):

"Executable Name" –unpack-client –install-dir="some\path\here"

An example of this would be:

```
FSIOasis-Client_1.7.8.3042.exe –unpack-client –install-dir="Y:\OasisAccess"
```

We recommend the installation directory is not the same as your working directory (Where AS2014 is, for example). This can be an UNC path if applicable (recommended).

2.) Point Citrix to the "FSIOasis.exe" executable inside the installation directory above ("Y:\OasisAccess"). Do **NOT** point Citrix to "Start FSIOasis.exe".

3.) Point Citrix Working Directory to your FSIOasis Installation Directory from Step 1 in the installation instructions (Not the Citrix installation step 1).*

4.) Run your Citrix App to test configuration. After you successfully launch the software, proceed with the normal installation instructions, starting with First Run Setup. Citrix should skip the Scheduler Installation.

*If you run into an error when launching FSIOasis via Citrix, depending on when you receive your error, the software may capture the reason why: If you launch the software and immediately receive an error, check the root "FSIOasis" directory for a file called "error.log" – this will contain detailed information of why the software could not launch. If you can launch the software, but, not get into a specific year / system, go to the appropriate year in windows explorer, and look for "error.log". This will contain detailed information of why the software could not launch a particular module.

Usually these errors are due to a permissions issue on either the "FSIOasis" folder itself, or, an access issue with the new shared location Citrix is launching the program from. All users require read/write/list access where FSIOasis is installed, and Read access where Citrix is launching from.

Terminal Server Installation

Inside the "Client" folder of the FSIOasis directory will be a client executable that contains the necessary files that FSIOasis needs to run. Terminal Server requires an executable to be accessed, but, the Client program you see in this directory is a self-extracting zip executable. This is why it is necessary to unpack the contents to a location your user's share, so Citrix can point to that location to run the program.

1.) To unpack the client the command is (using command-line):

"Executable Name" –unpack-client –install-dir="some\path\here"

An example of this would be:

```
FSIOasis-Client_1.7.8.3042.exe –unpack-client –install-dir="Y:\OasisAccess"
```

We recommend the installation directory is not the same as your working directory (Where AS2014 is, for example). This can be an UNC path if applicable (recommended).

2.) Create a shortcut on the desktop for your user(s) that points to the "FSIOasis.exe" executable inside the installation directory above ("Y:\OasisAccess"). Do **NOT** point the shortcut to "Start FSIOasis.exe".

3.) Point the shortcut's Working Directory to your FSIOasis Installation Directory from Step 1 in the installation instructions (Not the Terminal Server installation step 1).*

4.) Run your shortcut to test configuration. After you successfully launch the software, proceed with the normal installation instructions, starting with First Run Setup.

*If you run into an error when launching FSIOasis via Terminal Server, depending on when you receive your error, the software may capture the reason why: If you launch the software and immediately receive an error, check the root "FSIOasis" directory for a file called "error.log" – this will contain detailed information of why the software could not launch. If you can launch the software, but, not get into a specific year / system, go to the appropriate year in windows explorer, and look for "error.log". This will contain detailed information of why the software could not launch a particular module.

Usually these errors are due to a permissions issue on either the "FSIOasis" folder itself, or, an access issue with the new shared location Terminal Server is launching the program from. All users require read/write/list access where FSIOasis is installed, and Read access where the icon's target is located.

FSIOasis Security

FSIOasis' security module is designed in a granular fashion. This means the security module is extremely flexible in how it can be configured. If your company has a large user base, you might need to separate your access into different groups, with access to different portions of the software and different features. Or, your company might have a few users and everyone but one group needs access to everything. However you wish to configure your security, the product will be able to accommodate it!

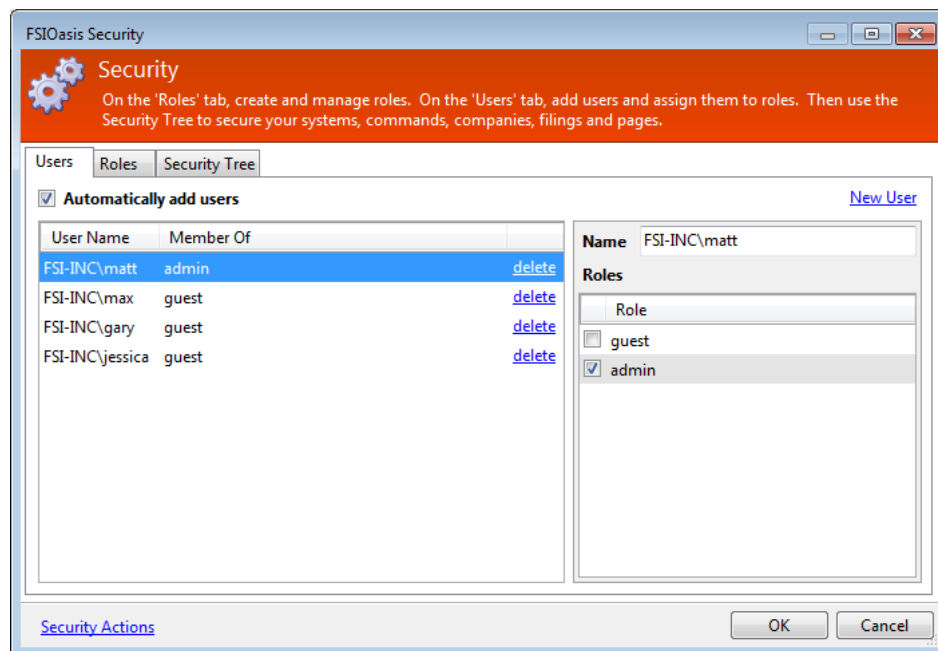
By default, security is disabled within the application, but can be enabled by selecting **Security** -> **Enable Security**. This will require a seed response, which you can obtain from us. This is a precaution to prevent you from locking yourself out of the application accidentally.

General

There are three tabs that control the security: **Security Tree**, **Users** and **Roles**. The Security tree will house all of the settings by system type, company, and then filing period. The settings can be copied from company to company, page to page, or filing to filing.

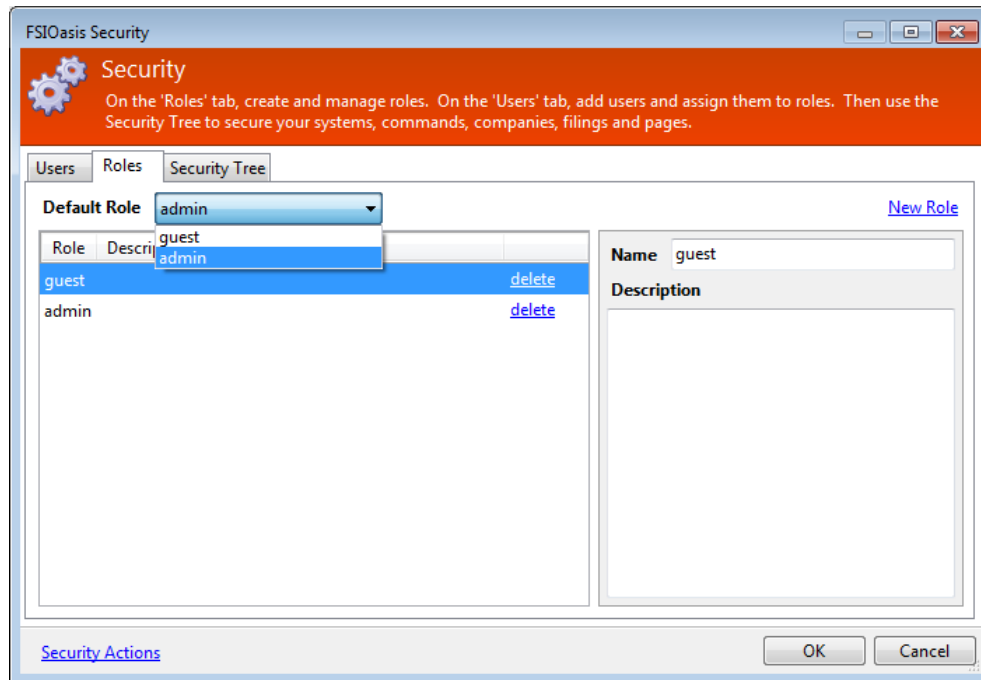
Users

The users tab will allow you to add Users to the Security and assign them to different Roles. Users can be manually added in by typing in their name, or automatically by checking the "Automatically add users". If you are in a domain environment, the domain name is critical in recognizing the user. FSIOasis will automatically read your Windows Credentials for access to the Program, this cannot be changed. Automatically adding users take care of this management for you.



Roles

By default, the roles of admin and guest are in the Roles tab. The roles however, do **NOT** have any permissions set, they need to be configured. There are no limits to how many roles you can have, or what they can be named. There is a default role which users are automatically assigned to if “Automatically Add Users” is checked, and this can be changed to any one of the roles you have made.



IMPORTANT: You can assign a user multiple roles, but, please note that FSIOasis mimics Windows permissions as close as possible. This means if you are assigned to two different groups, and you try to run the E-Filing Wizard, and one group is denied access to run the E-Filing Wizard, you will not be able to.

There is a special circumstance that two roles will not interfere: If you are assigned to two security roles, and one is set to a permission with 'Allow', but, the other role you are assigned to is not given explicit 'deny' access, it will allow you to use that feature. This is by design to help prevent security setup being too complex.

Security Tree

In order to enable access for users that have been assigned a role you will need to click on the Security Tree tab and begin to set your permissions in this area. Once the User and Role have been set up, you can click through the Security Tree and begin to set permissions on all of the options!

Below gives detailed information on all of the securable items within the software, with their hierarchy intact to find their location within the security module.

Security Tree Organization (Far left pane)

FSIOasis

Securable: Security
Flags: Modify or View

System Name (Such as Property or Life)

Securable: Batch Jobs
Flags: Add/Remove Batch Tasks, Run Tasks, View Tasks

Securable: Companies
Flags: Add Companies

Securable: Explore Directories
Flags: Execute (Windows Explorer)

Securable: Live Update
Flags: Execute (launches exe)

Securable: Scheduler
Flags: Add/Remove Tasks, Run Tasks, View Tasks

Securable: System Settings
Flags: Modify or View

Company Name

Securable: Company Settings
Flags: Modify or View

Filing Period

Securable: Backups

Flags: Backup, Restore

Securable: Data Conversion

Flags: Execute

Securable: Data Mapping

Flags: Create, Delete, Execute, List, Modify

Securable: Data Transfer (Prior Year Transfer)

Flags: Execute

Securable: Electronic Filing (E-Filing Wizard)

Flags: Execute

Securable: Print Utility

Flags: Execute

Securable: Verify Wizard

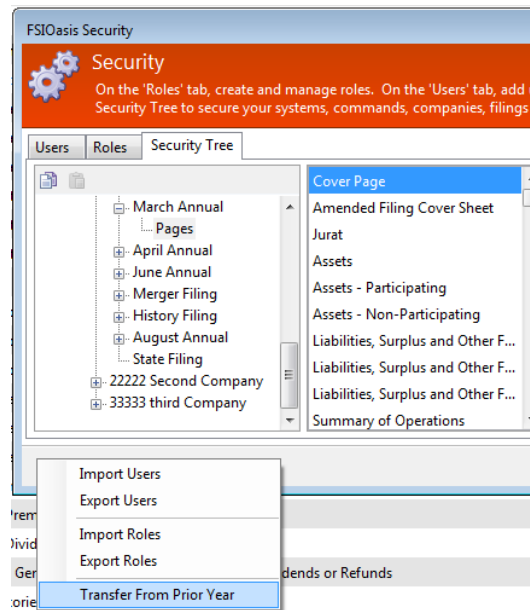
Flags: Execute, Modify Tolerance

Pages

Securable: Export, Lock/Unlock, Manage External Documents, Mark None, Print, Read, and Write.

Security Actions

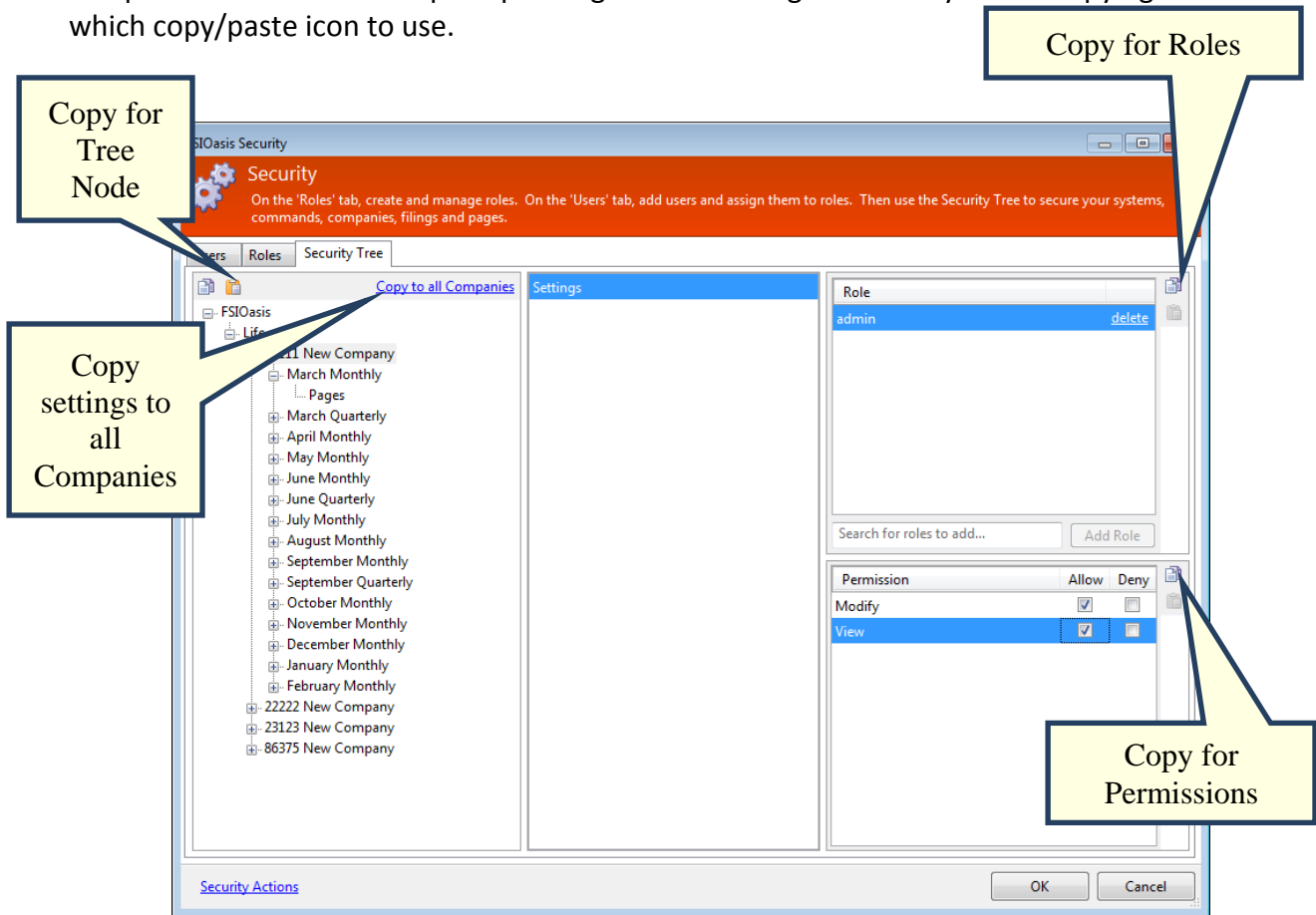
If you use FSI Security, you would want to transfer your security permissions from the previous year. This is not an automatic transfer done during installation or first-run wizard for various reasons. This action has to be done by a security administrator within the product. If you click on “Security Actions”, then “Transfer from Prior Year”, it will start transferring your security settings from the previous years’ filing – this is an undoable action.



A few other actions are for easy user management of bringing in multiple users at one time, and roles as well. You can also export out a list of the users and the roles using the same Security Actions button on the left-hand side of the Security Tree.

Security Tree Functions

The security module allows you to copy security settings across pages, filings and companies for ease of setup. Depending on the setting and level you are copying determines which copy/paste icon to use.



The Copy button is in three different places to accommodate what actions you'd like to copy. The Copy button next to the arrow will do copy actions on the levels available in the "FSIOasis" tree node. This means if you'd like to copy settings for Pages, Filing periods, or Company levels, use this copy button.*

If you'd like to copy Roles, you'd use the Copy button next to the "Roles" box. If you'd like to copy permissions, you'd use the Copy button next to the "Permissions" box.

If you want to copy settings from one company to all of the others at once time, select the company that you want to copy, then click "Copy settings to all Companies" and all of the settings for all filings will be copied to all companies at one time.

*Please note you can copy and paste permissions for like-items. This means you can copy Quarter to Quarter, or March Annual to March Annual, but you cannot mix. March Annual cannot copy into April Annual. If any pages are the same, it will apply, but the bulk will not.

An Example of a Quick Action:

Copying Page Settings from one filing to another: You select the “Pages” node in the left window pane, and then press the “Copy” button on the top-left hand corner of the screen.

Then select a March Annual for a different Company. Select the “Pages” node again, and then select “Paste” (Next to the Copy button). The settings for all the pages are now Copied, roles and permissions included.

The screenshot shows the FSIOasis Security application window. The interface includes a 'Security Tree' on the left, a central pane showing a list of pages, and a right-hand pane for role and permission management. Four callout boxes provide instructions:

- Step 1: Select “Pages”**: Points to the 'Pages' node in the Security Tree.
- Step 2: Click “Copy”**: Points to the 'Copy' button in the top-left corner.
- Step 3: Select “Pages” beneath March Annual in a different company**: Points to the 'Pages' node under the '22222 Second Company' entry in the Security Tree.
- Step 4: Click “Paste”**: Points to the 'Paste' button in the top-left corner.

The right-hand pane shows a list of roles with 'admin' selected. Below it, a table for permissions is visible:

Permission	Allow	Deny
Export	<input type="checkbox"/>	<input type="checkbox"/>
Lock/Unlock	<input type="checkbox"/>	<input type="checkbox"/>
Manage External Documents	<input type="checkbox"/>	<input type="checkbox"/>
Mark None	<input type="checkbox"/>	<input type="checkbox"/>
Print	<input type="checkbox"/>	<input type="checkbox"/>
Read	<input type="checkbox"/>	<input type="checkbox"/>
Write	<input type="checkbox"/>	<input type="checkbox"/>

Please contact us if you need assistance setting up your security. The first time would be the most challenge. After this we carry your setting from year to year and it would be updating only at that point.