This Information Roadmap describes the information available for ▮▮▮▮▮▮▮ and shows where you can locate it.

	Description and Location	▮▮▮™	▮▮▮™	▮▮▮™	▮▮ Desktop™	▮▮ s API Server	▮▮ Tracking™
HELP SYSTEM	An instant reference for field descriptions and procedures. Accessible from the taskbar.	Help system	Help system	Help system	Help system		Help system
CONTEXT SENSITIVE HELP	Directs the help system to information on the current page. Accessible from the system.				Help system		
USER MANUAL	An in-depth guide to system practices and procedures. Electronic copy accessible from the system.	CD + Book	CD + Book	CD + Book		CD	CD + Book
INSTALLATION GUIDE	Detailed instructions for installing the software on your system.	CD + Book	CD + Book	CD + Book	CD + Book	CD	See back of card
WHAT'S NEW	Changes from the previous version of the system. PDF copy accessible from the system.	CD + Book	CD + Book	CD + Book			
GETTING STARTED	A basic reference guide to introduce the system. PDF copy accessible from the system.	CD + Book					
RELEASE NOTES	Any notices, fixes, changes or updates to the system.	CD + Book	CD + Book	CD + Book	CD + Book		CD + Book
DATA DICTIONARY	A systematic reference to the file structure of the user database.	CD	CD				CD
DEVELOPER HELP	An advanced look at the code structure. For developers.				CD		

Legend

Help system   Printed book   Electronic document located in product directory, Documentation folder

Follow these instructions to upgrade your ▮▮▮▮▮▮▮ application with the ▮▮▮▮▮▮▮▮▮▮ module.

> **Important:** **If you are installing the ▮▮▮▮▮▮▮ software for the first time, follow the instructions in the First Time ▮▮▮▮▮▮▮▮▮▮▮ Application section of the ▮▮▮▮▮▮▮▮ User Guide.**

1. To install the current version of the ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮), insert the CD-ROM and double-click on **setup.exe**.

2. Log on to the ▮▮▮▮▮▮▮ system as a database owner (i.e., DBO ID). From the Express Options main menu, select **Corporate > Update License**.

3. On the Enter License Key dialog box, complete the **Company Number** and **License Key** (using the ▮▮▮▮▮▮▮▮▮ ing key). Click **OK.** From the Activate ▮▮▮▮▮▮ dialog box, click **Next**.

4. From the Common Stock Attributes dialog box, create an initial class of stock. Complete each field. *The Total Authorized Shares number must be at least as many as are allocated to the stock option plans.* Click **Save**.

5. Create and apply Alias and Affiliate Designations to each shareholder. Select **Optionee > Add or Modify an Optionee**. From the Optionee Data dialog box, select each shareholder and complete the **Additional Info tab**.

6. Create legend(s) to apply to certificates. Select ▮▮▮▮▮▮▮ > **Legends.** Click the **New** button to create a new legend.

7. Define when and where the corporation is qualified to do business. Select **Corporate > System Parameters > Company Profile**. From the Company Profile dialog box, click the **Share Tracking tab** and type corporation information.

8. Create classes and series of stock for issuance. Select this sequence to begin: **Share Tracking > Capitalization Authorization**. From the Capital Authorization tab, select and complete each tab.

9. Account for existing exercises, dispositions, and stock options in the database by performing the following steps:
   - Select ▮▮▮▮▮▮▮ > **Exercise / Convert Security > Existing Exercise Option Search** to view existing exercises that require a certificate. For each exercise record, select an exercise and click the **Issue Certificate** button to create the certificate.
   - Select ▮▮▮▮▮▮▮ > **Existing Option Disposition Search** to associate existing dispositions with certificates. Select a disposition record and click **Next** to continue.
   - Select ▮▮▮▮▮▮▮ > **Capital Authorization > Stock Options tab**. For each option plan, click the **Amendments** button to create an amendment.

10. You have now completed the installation upgrade!