



Client Data System® Vista Compatibility

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Introduction

This document explains the compatibility of Client Data System® (CDS) v6.1 with Windows® Vista® and provides installation information as well as a list of the CDS modules that have been tested on Vista.

Before Installing CDS v6.1 on Windows Vista

Turn off the User Account Control (UAC) before installing CDS. Note that users will need administrative rights to perform this action.

1. From the Windows Desktop, select **Start > Control Panel > User Accounts** and then click the **Turn User Account Control on or off** hyperlink.
2. Clear the **Use User Account Control (UAC) to help protect your computer** option and then select the **OK** button.
3. Restart the computer to apply these changes.

Notes for Standard Vista Users

1. A Standard User with UAC turned On is able to log in to CDS after entering the Administrator User Name and Password.
2. A Standard User with UAC turned Off is not able to log in to CDS; however, if CDS is installed on the root (e.g., C:\ outside the Program Files folder), the user can log in to CDS.

CDS Modules Tested on Vista

The following CDS v6.1 modules have been tested on Vista:

- Base System
- Activity
- Policy
- Investment Tracking
- Outlook Sync and Post
- MobileMerge

The following CDS v6.1 modules have not been tested on Vista:

- Pending Case Management
- Group Benefits

Known Issues

- Linked image files (e.g., jpg, bmp) do not open from the SmartPad. However, embedded images do open.
- The Reindex Internal Table functionality does not work for all tables.

Known Limitations

There is a file locking bug in Vista that might prevent the user from logging in to CDS if both the Server and Workstation are running Vista. In such a case, the user will not be able to log in to CDS on the workstation running Vista. Other workstations running Windows XP will work correctly.

Information on the bug and Hotfix is provided below:

- Hotfix: <http://support.microsoft.com/kb/935366>
- Forum: <http://forums.microsoft.com/MSDN/ShowPost.aspx?PostID=1259708&SiteID=1>
- More information: <http://fox.wikis.com/wc.dll?Wiki~WindowsVistaFileLockingBug~VFP>