

Personal Taxprep

Installation Procedures

Personal Taxprep 2017 v.5.0

Please read **all** of the installation instructions carefully **before** proceeding with the program setup.

For network installation, please refer to the "[Network or Advanced Network Version Installation](#)" section.

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Downloading From the Internet

To download this version of *Personal Taxprep* from the Internet, proceed as follows:

1. Go to <https://www.taxprep.com> and click **Downloads**.
2. Log on to your "Files Centre" by completing the "Login" section and click **Log in**.
3. In the "Dashboard" page, click the **Files Centre** button in the "Download" section.
4. Click **Personal Taxprep**.
5. Read and agree to the terms of the License Agreement and click **Continue**.

Note: Please take note of your activation key, as you will need it during the installation.

6. In the "Downloading the Program" section, click the ".exe" link. Then, click the **Save as** button
7. In the **Save As** dialog box, select the folder where you want to download the program.
8. Follow the instructions on the screen. Once the download has been completed, open the folder in which you saved the file. Double-click the downloaded setup file and follow the instructions.

Installation Instructions

It is strongly recommended that you close any applications that are running prior to installing the program.

Where to install Personal Taxprep 2017 v.5.0

If a previous version of *Personal Taxprep* 2017 is already installed, the installation program will automatically update your program to *Personal Taxprep* 2017 v.5.0.

If no previous version of *Personal Taxprep* 2017 is installed, we recommend that you install *Personal Taxprep* 2017 v.5.0 in the installation program's default folder.

Note

- Windows 8.1 and Windows 10 apply a filter named "SmartScreen" which allows you to control the installation of certain programs.

When launching the *Taxprep* installation program, the SmartScreen filter may display a warning indicating that the start-up of an unrecognized program has been prevented. This message is issued by Microsoft Windows. The *Personal Taxprep* installation program is signed using a digital certificate recognized by certification authorities (for more details, contact the Support Centre).

If such a warning displays, click **More info** and then **Run anyways** to continue with the installation.

- In addition, during the installation of your new *Taxprep* version, the additional **Wolters Kluwer Add-On Manager** module for Internet Explorer will be automatically installed so you can take advantage of new integration possibilities. If you do not want the installation of this module to be performed automatically, contact our Support Centre at csupport@wolterskluwer.com.

Local installation

1. Insert the *Personal Taxprep* CD-ROM in the CD drive (the installation program will start automatically), or execute the installation program, if you have downloaded it.

Note: The default display language of the installation program is the same as that of the operating system; if the display language is French, click **English** to continue the installation in English.

2. Click **Install Taxprep** to install *Personal Taxprep* (CD-ROM installation only), and follow the instructions displayed on the screen.
3. When prompted, select the destination folder of the application, click the **Browse** button, select the folder where you want to install *Personal Taxprep* and click **Next**. If you do not modify the default folder, the program will be installed in that folder.
4. When prompted, select the transmission database, select the folder where you want to create the database and click **Next**. If you do not modify the default folder, that folder will be used.
5. When prompted, select the templates, click the **Browse** button, select the parent folder where you want to create the sub-directories required to save the templates and click **Next**. If you do not modify the default folder, that folder will be used.
6. When prompted, select the location of the exported data for *Taxprep* slips, click the **Browse** button, select the folder where data from slips prepared with *Taxprep for Trusts* or *Taxprep Forms* will be exported and subsequently imported into *Personal Taxprep* and click **Next**. If you do not modify the default folder, that folder will be used.

During the first launch of the program, you will be prompted to retrieve the configuration of a previous version of *Personal Taxprep* if version 2016 has been detected on the computer.

Activation key

An activation key is required to install *Personal Taxprep*.

To access your activation key, go to <https://www.taxprep.com> and click **Downloads**. Log on to your "Files Centre" by completing the "Login" section and click **Log in**.

In the "Dashboard" page, click the the **Activation Key(s)** button in the "Download" section.

If you have already installed a previous version of *Personal Taxprep 2017*, the activation key will not be required. However, if you waited for this version to install *Personal Taxprep*, you will have to enter your activation key in the **Activate Product** dialog box during the installation.

User directory

To find out about or modify the directories of client files and templates that you specified during the installation, access the **Tools** menu, select **Options and Settings**, and click **File Locations**.

Location of the database and the transmission files

The prompted default location for the database and transmission files will be My documents\CCH\T1 Taxprep 2017\EFILE. In the event that your firm uses EFILE in a multi-user environment, we suggest that you define a location common to all transmitters for an easier follow up of their transmissions.

Before Network Installation

Windows: The UAC technology causes a limitation when installing a Network version with regard to mapped drives

The UAC technology (User Account Control) may possibly limit access to the network locations defined in the mapped drive (example: G:\). To bypass this limitation, you can use one of the following suggestions before proceeding with the installation:

1. Proceed with the installation of the program using the UNC format (Universal Naming Convention) network locations (example of UNC drive: \\server\folder).
2. Before proceeding with the installation, disable the UAC for all workstations from which the *Taxprep Network* version will be launched. To find out how to disable the UAC, consult the documents provided by Microsoft.

Define the destination folder for Network installation

A mapped drive or a UNC path can be used to define the destination folder that is required for the network installation of *Personal Taxprep*.

The transmission database default location, indicated during the installation, is the same format as the one used to define the program's destination folder.

As for the default location of the different types of files, including the EFILE database, the format type (mapped or UNC) used for the network installation is independent from the one used by the program. As a result, if you used a mapped drive format to indicate the destination folder for the network installation, the program will still use a UNC format to specify the default location of the different types of files.

If you want to use the UNC format, as recommended, to define the destination folder necessary for the network installation, enter the desired destination folder manually when prompted for the deployment location.

If you want to use the mapped drive format to define the network location of those files, once deployment

on the server is finished, you must enable the appropriate option in the **Options and Settings** dialog box, under **Options/Advanced**, then define each of the network locations to apply the change. Ensure that all workstations where the **Network** and **Advanced Network** versions are to be deployed use the same drive letters to designate the same location.

For more information on how to use mapped drives, consult the “Use the Mapped Drives to Define the Network Locations” help topic.

Network Version or Advanced Network Installation

Note: If the **Network** or **Advanced Network** version of a previous version of *Personal Taxprep 2017* was previously installed, consult the section for [updating the Network or the Advanced Network version](#).

There are three steps involved in the installation of the *Personal Taxprep Network* or *Advanced Network* version: preparation for deployment, deployment on the server and installation at each workstation.

Step 1 - Prepare to deploy

This step consists in installing all the necessary *Personal Taxprep* installation files at a location accessible to all users.

To proceed with this step, please continue as follows:

1. Insert the CD-ROM in the CD drive or download the installation file from the *Taxprep* Web site.
2. If you have downloaded the installation file, run the installation program (the program will start automatically from the CD-ROM).
3. Click **Install Taxprep** to install *Personal Taxprep* (if installation is performed from a CD-ROM).
4. Click **Network version** and follow the instructions on the screen.
5. Select the language used during the installation.

Note: The default display language of the installation program is that of the operating system; if the display language is French, click **English** to continue the installation in English.

6. When selecting the destination folder of the application, click the **Browse** button, select the folder where you want to install *Personal Taxprep* and click **Next**. This folder must be read-write accessible to all users.
7. Click **Finish** to deploy the program.

Step 2 - Deploy the program

This step makes *Personal Taxprep* accessible to all users and begins immediately after the deployment preparation step. If the deployment procedure does not

launch automatically, click the **T1 Taxprep 2017.Ink** file.

To proceed with this step, please continue as follows:

1. Select the language that you want to use to deploy the program.
2. The license agreement will display. Read it, click **I accept the license agreements**, then click **Next** to continue.
3. Enter the activation key and click **Next**.
4. Enter the requested information in the **Administrator Properties** dialog box and click **Next**.

Note: We recommend that you note this administrator information; it will be required to update the program and make changes to the user preferences.

5. If necessary, enter the administrator’s credentials in the **Administrative Privilege** dialog box. Click **Next** to continue. (Entering credentials during installation may be necessary to grant the rights needed to install the required files at local workstations.)
6. When prompted, select the location of the transmission database, click the **Browse** button, select the folder where you want to create the database and click **Next**. If you do not modify the default folder, that folder will be used.
7. When prompted, select the location of the templates, click the **Browse** button, select the parent folder where you want to create the sub-directories required to save templates and click **Next**. If you do not modify the default folder, that folder will be used.
8. When prompted, select the location of the exported data for *Taxprep* slips, click the **Browse** button, select the folder where data from slips prepared with *Taxprep for Trusts* or *Taxprep Forms* will be exported and subsequently imported into *Personal Taxprep* and click **Next**. If you do not modify the default folder, that folder will be used.
9. Click the **Start Personal Taxprep 2017** option to use the program from the server. During the first launch of the program, you will be prompted to retrieve the configuration of the previous *Personal Taxprep* version if this version has been detected on the computer.

Once the program has been deployed on the server, you will need to customize the various options and settings and define users’ rights with regard to customization.

Note: In the event that you have used the previous **Network** or **Advanced Network** version of *Personal Taxprep*, you can save time allocated to this step by converting shared customized templates and retrieving the network configuration defined for the previous version. For more information on this topic, consult the “[Retrieve the configuration of last year’s version](#)” section.

Step 3 - Install the program on each workstation

Once the options and settings configuration has been completed and the users’ rights have been defined, you must allow each authorized user to install the required files on his/her workstation.

The workstation program installation takes place as follows:

1. A link to the **T1 Taxprep 2017.lnk** shortcut is sent to the user by the person responsible for the installation. This shortcut is available in the root folder where the server application is deployed.
2. The user clicks the link.
3. The user enters the identification information (for the **Advanced Network** version installation only).
4. Files needed to run the program are installed on the workstation. The user must follow any instructions displayed on the screen at this point, if applicable.
5. A shortcut icon will appear on the desktop. The program automatically starts when installation is complete.

Procedure for Updating the Network Version or the Advanced Network Version of a previous version of Personal Taxprep 2017 to Personal Taxprep 2017 v.5.0

To update the version, proceed as follows:

Step 1 - Server update

1. Ensure that there are no users (except for the administrator) connected to the program.
2. For the **Network** version: In a previous version of *Personal Taxprep 2017*, select **Tools/Administrative Tools/Update server**.
For the **Advanced Network** version: In a previous version of *Personal Taxprep 2017*, go to the **Advanced Network** module.
3. For the **Network** version: Click **OK** in the dialog box displayed on the screen.
For the **Advanced Network** version: Click **Update** under the “Taskpad” section.
4. For the **Network** version: Enter the administrator’s user name and password, if applicable.
For the **Advanced Network** version: Click **OK** in the dialog box displayed on the screen.

5. Follow the instructions that are displayed on the screen.

Once the update is completed, the program will deploy the file to the administrator’s workstation and restart automatically.

Step 2 - Update of client workstations

1. The user double-clicks the program shortcut on the desktop or on the **Start** menu.
2. The files necessary to use the program are installed on the workstation following the update.

The user must follow the instructions that are displayed on the screen, if applicable. The program starts up automatically when the update is completed.

After Installation of Personal Taxprep

Retrieve the configuration of last year’s version

Personal Taxprep 2017 offers the possibility to retrieve the network configuration and users’ customized configurations of a local or network version of *Personal Taxprep 2016*. Retrieving the network configuration and the configuration customized by each user, combined with the conversion of the shared customized templates allow the administrator to deploy *Personal Taxprep* more rapidly. To fully benefit from all of the advantages offered by those functionalities, administrators of a network version should proceed as follows:

1. Once deployment of the program is completed, convert the shared customized templates (client filters, print formats, letters and labels as well as preparer profiles). For more information on how to convert the different customized templates, refer to the program’s Help.
2. Once the templates are converted, retrieve the network configuration. To retrieve the network configuration of a **Network** version, click the **Retrieve Configuration** command available on the **Tools/Administrative Tools** menu (**Network** version) or the taskpad on the **Advanced Network** view (**Advanced Network** version). The wizard will guide you through the steps to retrieve the network configuration.
3. Once the program is installed, each user will be able to retrieve the customized configuration during the first launch of the program, if he/she has the necessary rights.

For more information about retrieving the configuration, consult the program’s Help.

Restarting Windows

Depending on the system configuration, the Install program may prompt the user to restart Windows after installing the program so that the files can be initialized. If you launch the program immediately after the installation, Windows must be restarted.

Taxprep Configuration for the Use of a Proxy Server

If you are using a proxy server to access the Internet, you must configure the settings to connect to this server to enable the electronic transmission of data in *Taxprep*.

To configure the usage settings of a proxy server, proceed as follows:

1. In the **Tools** menu, select **Options and Settings**.
2. Under **Electronic Services**, click **Proxy Server**.
3. In the **Proxy Server** panel, select the check box **Use a proxy server**.
4. Click **Get Settings**. If proxy server settings are detected, they will automatically display in the appropriate fields. Then, go to step 7. Otherwise, you will have to manually enter the information provided by your network administrator by following the steps below.
5. In the "Address of the proxy server" field, enter the proxy IP address.
6. In the "Port" field, enter the number of the port used by the proxy server for Internet connection.
7. If the proxy server is configured to authenticate users who want to access the Internet, enter the name of the user in the "User name" field and enter the related password in the "Password" field.
8. Click **OK** to save the configuration.

Note: In a network version, the administrator can limit the ability of users to modify the configuration settings of a proxy server by locking the **Proxy Server** panel in the **Options and Settings** dialog box.

System Requirements

To correctly execute *Personal Taxprep*, your computer system must have the following:

Processor

Dual Core processor (Quad Core is recommended)

Supported operating systems

- Windows 7 SP1 (32-bit and 64-bit) except for Starter and Home Editions*
End of support: Microsoft will [stop supporting Windows 7](#) in January 2020. Since it is our policy to align our support of operating systems with software vendors, take note that the versions of our software applications that will be released starting in November 2019 will no longer support Windows 7.
- Windows 8.1 (32-bit and 64-bit) except for Basic Edition*
- Windows 10 (32-bit and 64-bit) except for Education and Home Editions*
- Windows Server 2008 R2 SP1

- Windows Server 2012 SP1 and R2
- Windows Server 2016
- Remote Desktop Services in Windows Server 2008 R2 SP1, 2012 SP1, 2012 R2 and 2016
- Citrix XenApp 6.5
- Citrix XenApp 7.11

* For more information on the different Windows Editions, and their respective minimum requirements, consult the Microsoft Web site:

- For Windows 7:
<https://windows.microsoft.com/en-CA/windows7/products/system-requirements>
- For Windows 8.1:
<https://windows.microsoft.com/en-CA/windows-8/system-requirements>
- For Windows 10:
<https://www.microsoft.com/en-ca/windows/windows-10-specifications#sysreqs>

Note: RAM requirements are highly dependent on the operating system used. Please refer to the documentation provided with your operating system for minimum and recommended RAM requirements.

Important: While supported, Windows 7 Service Pack 1 does not have SMB 3.0 encryption for data in transit and is not a recommended system requirement for this product. We are strongly recommending that all customers enable the enhanced security measures available in Windows 8 or higher operating system, including SMB 3.0 encryption for data in transit. Since the configuration of SMB 3.0 is explicit, please consult this [Microsoft article to proceed with its configuration](#).

Microsoft .Net Framework

Microsoft .Net Framework v.4.5.2 is required.

Network File Systems

- NTFS
- FAT32
- exFAT

Internet connection

- An Internet connection is required to use the various electronic services provided by *Personal Taxprep*.
- The TLS 1.2 protocol must be enabled in the Internet Explorer (10 or 11) browser settings.

Browser configuration required to use the TaxprepConnect download service

If you can access the CRA's *Represent a Client* service with your Web browser, your configuration should normally allow you to use **TaxprepConnect**.

The recommended configuration for Internet Explorer (10 or 11) is as follows:

- the defined Internet security level is the default level;
- the TLS 1.2 protocol is used;
- the cookies are enabled; and
- the JavaScript function is enabled.

If the above is not complied with, you might be unable to access the CRA log in services.

The CRA *Represent a Client* service uses persistent cookies. These persistent cookies will not log nominative data.

CCH Scan

Adobe Reader

Version 11.0 and DC

Adobe Acrobat Standard/Pro

Versions 10.0 (also titled X) or 11.0 and DC

Where to Find Help

If you have any questions regarding the program's use, there are several options for getting help. Refer to the *Quick Start Guide* to help you quickly become familiar with the principal features of *Personal Taxprep*; it is available in the **Professional Centre** for quick reference. If you are in the program and need help, press F1 to get help on a specific topic.

How to Reach Us

E-mail

Customer Service:

cservice@wolterskluwer.com

Tax and Technical support:

csupport@wolterskluwer.com

Telephone

1-800-268-4522

Web Site

<https://www.taxprep.com>