

Taxprep Forms

Installation Procedures

Taxprep Forms 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 *Taxprep Forms* 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 **Taxprep Forms**.
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** button to download the program.
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 Taxprep Forms 2017 v.5.0

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

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

Notes

- 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 *Taxprep Forms* 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 the new integration possibilities.

If you do not want the installation of this module to be performed automatically, contact the Support Centre at csupport@wolterskluwer.com.

Local installation

1. Insert the *Taxprep Forms* 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 Forms** to install *Taxprep Forms* (CD-ROM installation only).
3. When prompted, select the destination folder of the application, click the **Browse** button, select the folder where you want to install *Taxprep Forms* and click **Next**. If you do not modify the default folder, the program will be installed in that folder.
4. 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 the templates and click **Next**. If you do not modify the default folder, that folder will be used.
5. When prompted, select the location of the exported data for *Taxprep* slips, click the **Browse** button, select the folder where data 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 *Taxprep Forms* if that version has been detected on the computer.

Activation key

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

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 **Activation Key(s)** button in the "Download" section.

If you have already installed a previous version of *Taxprep Forms* 2017, the activation key will not be required. However, if you waited for this version to install *Taxprep Forms*, 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**.

Before Network Installation

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

The User Account Control (UAC) technology 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:

1. Proceed with the installation of the program using the UNC (Universal Naming Convention) format 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 *Taxprep Forms*.

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 or Advanced Network Version Installation

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

There are three steps involved in the installation of the *Taxprep Forms 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 *Taxprep Forms* 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 Forms** to install the program (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 *Taxprep Forms* 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 *Taxprep Forms* accessible to all users and begins immediately after the deployment preparation step. If the deployment procedure does not launch automatically, click the **Taxprep Forms 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, the program will be installed in that folder.
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 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 Taxprep Forms 2017** option to use the program from the server.

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 *Taxprep Forms*, you can save time allocated to this step by converting shared customized templates and retrieving the network configuration defined from the previous version. For more information on this topic, consult the "[Retrieve last year's configuration of Taxprep Forms](#)" 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 **Taxprep Forms 2017.Ink** 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, if applicable.
5. A shortcut icon will appear on the desktop. The program automatically starts when installation is complete.

Procedure for Updating the Network or Advanced Network Version of a previous version of Taxprep Forms 2017 to Taxprep Forms 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 *Taxprep Forms 2017*, select the **Tools/Administrative Tools/Update server** command.
For the **Advanced Network** version: In a previous version of *Taxprep Forms 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 the **Update** link in the "Taskpad" section.
4. For the **Network** version: Enter the user name and the administrator's 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 on the administrator workstation and restart automatically.

Step 2 - Update of client workstations

1. The user double-clicks the program shortcut on the desktop or selects it from 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

Retrieve last year's configuration of Taxprep Forms

Taxprep Forms 2017 offers the possibility of retrieving the network configuration and users' customized configurations of a local or network version of *Taxprep Forms 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 *Taxprep Forms* more rapidly. However, to fully benefit from all of the advantages offered by those functionalities, administrators of a **Network** version should comply with the following method:

1. Once deployment of the program on the server is completed, first convert the shared customized templates (client filters, print formats, letters and labels as well as preparer profiles). For 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 on 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 the user plans to access *Taxprep Forms* immediately, Windows must be restarted.

System Requirements

To correctly execute *Taxprep Forms*, 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 Editions*
- 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 transmit slips and use the various electronic services provided by *Taxprep Forms*.
- The TLS 1.2 protocol must be enabled in the Internet Explorer (10 or 11) browser settings.

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 *Taxprep Forms*; 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>