
Before you install ProSeries® Express Edition software for network use

The following pages describe system requirements and other information you need to know before installing ProSeries Express Edition software for network use.

Important: Before you begin installing 2006 ProSeries Express Edition software, be sure to read pages 1 through 8 of the ProSeries Express Edition Quick Reference Guide. We also recommend that you review all the information in this guide.

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If you have additional questions about network installation, start your Internet browser, then go to <http://www.proseries.com>. From the ProSeries.com home page, select **Support**, type a word, phrase, or question in the **Search the Knowledge Base** field, then select **Search**.

Tip: If you want help optimizing ProSeries Express Edition software on your network, your Network professional can go to <http://www.proseries.com>, login to My ProSeries, then send an e-mail to Technical Support.

Computer system requirements

ProSeries Express Edition Quick Reference Guide lists the computer system requirements for ProSeries Express Edition 2006.

The following table lists additional system requirements for network operation.

For more information about how system requirements can affect the operation of the ProSeries Express Edition program, go to <http://www.proseries.com/sysreq>.

Network Component	Recommendation	Minimum Requirement
File Server	Dedicated File/Application server, 2.0 GHz CPU or faster if less than 3000 client files Dedicated File/Application server, 2.8 GHz CPU or faster if more than 3000 client files	650 MHz CPU as a dedicated File/Application server or host on a peer-to-peer network if less than 3000 client files 1 GHz CPU as a dedicated File/Application server or host on a peer-to-peer network if more than 3000 client files

Network Component	Recommendation	Minimum Requirement
File Server memory	512 MB RAM or more if less than 3000 client files 1 GB RAM or more if more than 3000 client files	256 MB RAM if less than 3000 client files 512 MB RAM if more than 3000 client files If the File Server is also a workstation, add the workstation memory amount to the File Server memory amount.
File Server hard disk space	2 GB or more The amount of hard disk space required depends on the number of products you install and the number of client returns you prepare.	800 MB + More space may be required if you install many products or prepare a large number of returns.
File Server operating system	One of the following: <ul style="list-style-type: none"> Windows XP (Professional edition) Windows 2003 Server Windows 2000 Server if less than 3000 client files 	One of the following: <ul style="list-style-type: none"> Windows XP (Home edition) Novell Netware (version 5.1, 6 or later) Windows 2000 Server if more than 3000 client files Note: Windows NT isn't supported for the 2006 tax year. Novell Netware won't be supported after the 2006 tax year.
Workstation computer	2.0 GHz or faster if less than 3000 client files 2.8 GHz or faster if more than 3000 client files	500 MHz if less than 3000 client files 1 GHz if more than 3000 client files
Workstation memory	512 MB RAM or more if less than 3000 client files 1 GB RAM or more if more than 3000 client files Note: Add 1 GB RAM for each additional 3000 client files.	256 MB RAM if less than 3000 client files 512 MB RAM if more than 3000 client files Note: Add 512 MB RAM for each additional 3000 client files.
Workstation hard disk space	2 GB or more	1.2 GB
Workstation operating system	Windows XP (Professional or Home edition)	Windows 2000 (service pack 3 or later) Note: Windows NT, 98, and ME aren't supported for the 2006 tax year.
Workstation screen resolution	1024 x 768 or higher	800 x 600
Network infrastructure	100 MB optimized connection environment (Network Interface Cards, Cat V cabling, and Hubs)	100 MB optimized connection environment (Network Interface Cards, Cat V cabling, and Hubs) 54 MB wireless connection environment if less than 3000 client files
Internet Browser	Microsoft Internet Explorer 6.0 or later	Microsoft Internet Explorer 5.5, service pack 2 or later
Internet Service Provider (ISP)	An ISP is required for features that use the Internet, such as electronic filing and the online delivery of products and product updates. ProSeries Express Edition software works with most ISPs. Contact your ISP if you have a specific question.	
Internet connection	High-speed Internet connection, such as T-1, DSL, or cable modem	56.6 K modem if less than 3000 client files High-speed Internet connection, such as T-1, DSL, or cable modem, if more than 3000 client files

Summary of the network installation process

Following is a summary of how to prepare your networked system and then install ProSeries Express Edition 2006 software for network use.

Note that certain details vary from system to system. For more detailed information, refer to the applicable sections of this guide.

Prepare to install the network version of the program

Take the following steps before you begin the ProSeries Express Edition installation procedure. For instructions related to shared folders, mapped drives, rights, and permissions, refer to the documentation for your operating system and/or network software.

- 1 Decide which drive on the server (if you have a client-server network) or the serving computer (if you have a peer-to-peer network) you will install ProSeries Express Edition 2006 shared network components.
- 2 On the drive you chose, create a folder named **ProSeries**.
- 3 Make the **ProSeries** folder a shared folder, and assign it the name "ProSeries."
- 4 Within the **ProSeries** folder, create a folder named **ExpNet06**.
- 5 Decide which computer will be the ProSeries Express Edition Admin workstation. Make sure a drive is mapped to the **ProSeries** folder on the server or serving computer, and make sure the ProSeries Express Edition Admin workstation has the appropriate rights and permissions.
- 6 Go to each computer that will serve as a ProSeries Express Edition User workstation. Make sure a drive is mapped to the **ProSeries** folder on the server or serving computer, and make sure each ProSeries Express Edition User workstation has the appropriate rights and permissions.

Steps 1 and 2: Install and set up ProSeries Express Edition software from the Admin workstation

From the computer that will be the ProSeries Express Edition Admin workstation:

- 1 Insert the ProSeries Express Edition CD into the appropriate drive to start the ProSeries Express Edition installation program, then follow the instructions on the screen.
- 2 In the **Select an Installation Type** dialog box, select **Network** to begin **Step 1: Install to this computer (ADMIN Workstation)**.
- 3 In the **Choose Destination Location** dialog box, accept the recommended locations for the **Local Folder** and **Network Folder** unless:
 - **Local Folder.** You want the **ExpWin06** folder on a local drive other than C:\.
 - **Network Folder.** The suggested location isn't appropriate or the **Network Folder** field is blank. If this is the case, select the **ExpNet06** folder within the **ProSeries** folder that you created on the server or serving computer. For example, select **T:\ProSeries\ExpNet06**.
- 4 In the **Tax Year 2006 Product Selections** dialog box, select all the federal and state products that you expect to use this year.
- 5 During **Step 2: Complete Licensing (Connected Customer)**, enter your Customer Number and ZIP code (which are printed in the **Sold To:** area of your packing slip).
- 6 Print the instructions in the **Step 3: Install USER Workstations** dialog box.

Step 3: Set up each ProSeries Express Edition User workstation

From each ProSeries Express Edition User workstation:

- 1 Click **Start**, select **Run**, enter the path that's identified in the User workstation installation instructions, then click **OK**.
- 2 Follow the instructions on the screen. In the **Choose Destination Location** dialog box, accept **C:\ExpWin06** as the recommended location for the **Local Folder**, or select a different local drive for the **ExpWin06** folder.

Factors for deciding how to install and use ProSeries Express Edition software

Important: If you are going to install ProSeries Express Edition 2006 software for network use, we strongly recommend that you purchase ProSeries Express Edition/Network Version (if you haven't already) before you begin the software installation process. If you don't, the ProSeries Express Edition software won't be licensed for network use, and you won't be able print or e-file returns until your product licensing information includes a Network License.

How you install and use ProSeries Express Edition software depends on several factors, including the number of computers that will be running the ProSeries Express Edition program.

One computer. If you are going to use ProSeries Express Edition software on one computer, install the program for stand-alone use on that computer's hard drive. See "Installing ProSeries Express Edition software for stand-alone use" in the ProSeries Express Edition Quick Reference Guide.

Multiple computers. If you are going to use ProSeries Express Edition software on more than one computer, you have three options for installing and using the program. See the following table.

To use the software this way...	Install the program this way...
Each preparer maintains an independent set of clients	Go to each computer and install ProSeries Express Edition software for stand-alone use.
Preparers share clients and regularly review returns for other preparers	<ol style="list-style-type: none">1. Go to the computer that you choose to be the ProSeries Express Edition Admin workstation, then install ProSeries Express Edition software for network use. You'll (a) install ProSeries Express Edition network components to a shared folder, and (b) install and set up the ProSeries Express Edition program on that computer's hard drive.2. Go to each computer that will serve as a User workstation that runs the ProSeries Express Edition program and accesses the ProSeries Express Edition network components from the shared folder, then install and set up the ProSeries Express Edition program.
Preparers work in the office sharing and reviewing returns. Some preparers use laptop or notebook computers to begin and prepare returns at client sites.	<ol style="list-style-type: none">1. Go to the computer that you choose to be the ProSeries Express Edition Admin workstation, then install ProSeries Express Edition software for network use. You'll (a) install ProSeries Express Edition network components to a shared folder, and (b) install and set up the ProSeries Express Edition program on that computer's hard drive.2. Go to each computer that will serve as a User workstation that runs the ProSeries Express Edition program and accesses the ProSeries Express Edition network components from the shared folder, then install and set up the ProSeries Express Edition program.3. Go to each laptop or notebook computer, then install and set up ProSeries Express Edition software for stand-alone use on that computer's hard drive.

Important: If a preparer is going to prepare returns on a laptop or notebook computer that will be mobile (in a manner permitted by the ProSeries Express Edition Software License Agreement), install the software for stand-alone use on the hard drive of that laptop or notebook computer.

Important: If you install ProSeries Express Edition software for stand-alone use on a laptop or notebook computer, be sure to use the **Copy/Backup** and **Restore** commands when “moving” client files from the network to the laptop or notebook computer, or from the laptop or notebook computer to the network. In HomeBase, first select one or more client files. Next, go to the **File** menu, select **Client File Maintenance**, then select **Copy/Backup** or **Restore**.

Tip: The Access Rights feature can control access to the software and specific features on computers on which ProSeries software is installed for stand-alone use, and/or computers that serve as ProSeries workstations when ProSeries is installed for network use.

Advantages of network installations

The following table lists some of the features that you can take advantage of when you install ProSeries Express Edition software for network use:

This feature...	Offers this advantage with network use...
Internet connection	Only the ProSeries Express Edition Admin workstation (which is the computer from which you install ProSeries Express Edition software) needs an Internet connection.
Client file locking	The ProSeries Express Edition program prevents more than one user from opening a client file at the same time, which helps prevent client data from being overwritten.
Pay-Per-Return	All workstations share one pay-per-return account.
Control/Access	Some features (such as Task Scheduler) can be changed only from the ProSeries Express Edition Admin workstation.
ProSeries Express Edition options and features	Users can set up most ProSeries Express Edition options and features on their workstations. Note: Some ProSeries Express Edition options and features (such as access rights, firm/preparer information, global billing options, standard letters, and standard invoices) are the same for all workstations. If a user changes one of these “global” options or features, the change affects all workstations.
Data entry	Employer and payer data entered on all workstations is entered in the Employer/Payer EIN database, and that data is then available to all workstations.
Electronic filing	The program manages electronic filing factors (such as the assignment of DCNs to returns and extensions) across all ProSeries Express Edition workstations in the network.

Prepare your networked computer system

Before you can install ProSeries Express Edition software, you must prepare your networked computer system. The specific steps appropriate for your system depend on the type of network and the way it’s set up. It’s helpful to know some network-related terms before you start. The table below explains some of the more common terms.

Term	Explanation
Client-server network	A network setup where only one computer (the server) shares resources used by one or more workstations (the clients).

Term	Explanation
Peer-to-peer network	Up to 10 computers that are linked together. One or more systems may share resources.
Mapped drive	Any drive or shared resource that has a drive letter assigned to it.
ProSeries Express Edition Admin workstation	The computer from which ProSeries Express Edition software is installed to the server or serving computer. You can designate any computer to be the ProSeries Express Edition Admin workstation (including the network administrator's computer), but once you choose a ProSeries Express Edition Admin workstation, it must remain the ProSeries Express Edition Admin workstation throughout the tax season.
ProSeries Express Edition User workstation	A computer that runs the ProSeries Express Edition program and accesses the ProSeries Express Edition network components from the shared folder.
Shared folder	The folder that the Network Administrator sets up to be shared in the network system. The ProSeries Express Edition shared folder is the location where ProSeries Express Edition shared network components and client files reside.
Primary file location	This is the location where the program stores all current-year client files. This location can be set only from the ProSeries Express Edition Admin workstation.

Important: For more information about shared folders, drive mapping, and access rights, refer to your network vendor's documentation. If you have additional questions about preparing your networked system for the network version of the ProSeries Express Edition software, go to <http://www.proseries.com>, select **Support**, type a word, phrase, or question in the **Search the Knowledge Base** field, then select **Search**.

Step 1 - Decide which computer will be the Admin workstation

Your first step is deciding which computer will be the ProSeries Express Edition Admin workstation. Use the following information to help you decide.

- **Internet access.** The computer that you select to be the ProSeries Express Edition Admin workstation should have an Internet connection because product updating via the Internet must be done at the ProSeries Express Edition Admin workstation.
- **Type of network.** Determine whether you're using a client-server network or a peer-to-peer network.
 - **Client-server network.** You install ProSeries Express Edition software from the ProSeries Express Edition Admin workstation to the server's hard drive. With this type of system, the ProSeries Express Edition Admin workstation and the server are two different computers. The ProSeries Express Edition Admin workstation can be used as a workstation, but the server is **not** used as a workstation.
 - **Peer-to-peer network.** You install ProSeries Express Edition software on the ProSeries Express Edition Admin workstation's hard drive. With this type of system, the ProSeries Express Edition Admin workstation can be used as a workstation.
- **Performance.** If your network is a client-server network, we recommend that you don't use the server as a ProSeries Express Edition User workstation. Doing so can degrade network performance.
- **Rights.** The Admin workstation is the only computer that has rights to at least some aspects of the following features: Product Updating, Customer Information, Primary File Location, Firm Name and Address, Master Password, Electronic Filing Password, Bank Products Registration Information, Database Maintenance, and HomeBase Tune-up.

Tip: If you need to make a different computer the ProSeries Express Edition Admin workstation during the tax season, contact ProSeries Express Edition Technical Support for assistance.

Step 2 - Create a shared folder

Important: Before you begin the installation process, we recommend that you:

- Create a folder on the drive to which you will be installing ProSeries Express Edition 2006 shared network components, and name that folder **ProSeries**
- Make that new folder a shared folder, and assign it the name “ProSeries”

If you don't take these steps before you begin the installation process (from the Admin workstation), you must make the folder on the drive where you install the ProSeries Express Edition shared network components a shared folder before you install the program on the user workstations.

Tip: For information about how to make a folder a shared folder, see the documentation for your operating system.

Factors to consider

ProSeries folder name. For best results, use **ProSeries** as the name of the shared folder within which you will install the shared network components for the ProSeries Express Edition software. This will be the shared folder that all workstations will access when running the ProSeries Express Edition program. If you install the network version of ProSeries Express Edition in future tax years, you can install the shared network components for that software to the **ProSeries** shared folder.

Netshare and other folder names. If you installed ProSeries Express Edition 2005 (or ProSeries 2005) shared network components to a folder within a shared folder that had a name other than **ProSeries**, you can install ProSeries Express Edition 2006 shared network components to another folder within that shared folder. For example, if you installed ProSeries Express Edition 2005 shared network components to **ExpNet05** within a shared folder named **Netshare**, you can install ProSeries Express Edition 2006 shared network components to **ExpNet06** within the **Netshare** shared folder if you want to maintain the same structure and naming conventions.

Peer-to-peer network. If you are running a peer-to-peer environment, you can install ProSeries Express Edition 2006 shared network components to the C:\ drive and share the whole C:\ drive. However, if you do this, you give everyone on your network access to all files and folders on the C:\ drive. **We recommend you share the \ProSeries folder on the C:\ drive instead.**

File caching. If you're using a shared NTFS drive, take the following steps to turn off file caching for the shared folder:

- 1 Go to Windows Explorer, right mouse click on the shared folder that you created for the ProSeries Express Edition software, then select **Sharing**.
- 2 Click **Caching** in the dialog box, make sure there isn't a check in the “Allow caching of files in this shared folder” box, then click **OK**.

Step 3 - Map drives if appropriate

We recommend that you use mapped drives, and that the drive with the ProSeries Express Edition shared network components be mapped to the same drive letter for all workstations.

Factors to consider

Mapped to same drive letter. If you're an existing ProSeries Express Edition network user and have all computers mapped to the same drive letter, you don't have to change anything. Install ProSeries Express Edition software as you did last year.

Mapped to different drive letters. If all of your workstations are mapped to a network shared folder using different drive letters, you don't have to re-map the workstations.

New computers. If you're an existing ProSeries Express Edition network user and you've added new computers to your network, we recommend that you set them up the same way as the existing workstations on your network.

New user. If you are installing ProSeries Express Edition software for the first time, you can install ProSeries Express Edition 2006 shared network components directly to a shared folder without mapping drives. You can run the workstation installation and setup from all other computers by accessing this shared folder.

UNC instead of mapped drives. UNC stands for "Universal Naming Convention" or "Uniform Naming Convention." UNC uses the following format: \\server-name\shared-folder-path

If you use UNC instead of mapped drives, the shared folder doesn't have to be mapped to a network letter as long as all workstations can access the shared folder. However, if you use UNC instead of mapped drives, you must use UNC exclusively.

Important: Don't use both UNC and mapped drives.

Integration with other software. The ProSeries Express Edition program integrates properly with software (such as ProSeries\Fixed Asset Manager) only if it's installed to mapped drives.

Step 4 - Review Workstation operating system access rights

You will be installing ProSeries Express Edition files to an **ExpNet06** directory in a shared folder. There will also be a **ProPDF** directory (for the PDF version of any client files that you choose to create) in that shared folder.

- **Access.** Each workstation must be able to access the shared folder where you will be installing ProSeries Express Edition 2006 shared network components.
- **Windows-based servers.** If you're using Windows 2000 or Windows XP (Professional), all users need to be a member of the Administrators group.
- **Novell servers.** All users need Read, Write, File Scan, Modify, Erase, Delete, and Create rights (including access control), but they don't need the Supervisor Right.
- **Peer-to-peer networks.** The network shared folder needs to be set to Full Control.

For more information about these factors, refer to your network vendor's documentation.

Install and set up ProSeries Express Edition software from the Admin workstation

Installing and setting up ProSeries Express Edition software for network use involves the following three steps:

- **Step 1: Install to this computer (ADMIN workstation)**
- **Step 2: Complete Licensing (Connected Customer)**
- **Step 3: Install to other network computers (USER workstations)**

Steps 1 and 2 are discussed in this section. Step 3 is discussed on page 16.

When you install ProSeries Express Edition software so multiple computers (i.e., workstations) can use the program in a networked environment, you install the software from the first ProSeries Express Edition CD that you receive. Each ProSeries Express Edition CD contains the latest version of every ProSeries Express Edition tax product that is currently available.

Important: We strongly recommend that you install the program from the first ProSeries Express Edition CD that you receive so you can download ProSeries Express Edition products via the Internet as soon as possible. For more information, see “Keeping your ProSeries Express Edition products up-to-date” on page 23.

Tip: For details about each ProSeries Express Edition CD, see “Software service and delivery information” in the ProSeries Express Edition Quick Reference Guide.

Before you install ProSeries Express Edition software for the 2006 tax year, note the following:

- **Release Notes.** Read the printed Release Notes and any other material that accompanied the ProSeries Express Edition CD.
THE RELEASE NOTES MAY CONTAIN, AMONG OTHER THINGS, ADDITIONAL LICENSING TERMS THAT GOVERN THE USE OF THE SOFTWARE AND RELATED SERVICES.
- **Packing slip.** The packing slip that accompanied the ProSeries Express Edition CD contains your Customer Number and ZIP code, which you will need to complete the product licensing procedure. No other product licensing information is printed on the packing slip.

Important: Your software will be licensed for network use during the product licensing procedure if you’ve purchased ProSeries Express Edition/Network Version. If your product licensing information doesn’t include a Network License, you can enter and save client data, but you can’t print or e-file returns until you update your firm’s product licensing information.

To install ProSeries Express Edition software for network use from the ProSeries Express Edition Admin workstation:

Step 1: Install to this computer (ADMIN workstation)

- 1 Go to the ProSeries Express Edition Admin workstation.
- 2 Close all open applications and turn off any virus-protection utilities.
- 3 Insert the ProSeries Express Edition CD into the appropriate drive.
Don’t remove the CD from the drive until the installation process is complete.
- 4 In the **ProSeries Express Edition Installation** dialog box, click **Install ProSeries Software**.
If the **ProSeries Express Edition Installation** dialog box doesn’t appear automatically:
 - a. Go to the Windows taskbar, click **Start**, then select **Run**.
 - b. In the **Run** dialog box, type `x:\CDSETUP` (where *x* represents the letter of the drive containing the ProSeries Express Edition CD), then click **OK**.
 - c. When the **ProSeries Express Edition Installation** dialog box appears, click **Install ProSeries Software**, then continue to Step 5.
- 5 In the **Welcome** dialog box, click **Next** when you’re ready to continue.
- 6 A **System Warning** dialog box appears if the computer doesn’t meet the minimum system requirements for the ProSeries Express Edition 2006 software. (For more information, see “Computer system requirements” on page 1.)
If the **System Warning** dialog box appears, read the information, then do one of the following:
 - Click **Cancel** to exit the installation program, then correct the identified situation(s). After the computer meets the minimum system requirements, go back to Step 1 and start the installation procedure again.
 - Check the box indicating that you understand you may not receive technical support for issues you may encounter while using the ProSeries Express Edition program, then click **Next** to continue to Step 7.

Important: We strongly recommend that you click **Cancel** and correct the situation(s) identified in the **System Warning** dialog box.

Tip: Go to <http://www.proseries.com> for more information about how system requirements can affect the operation of the ProSeries Express Edition program.

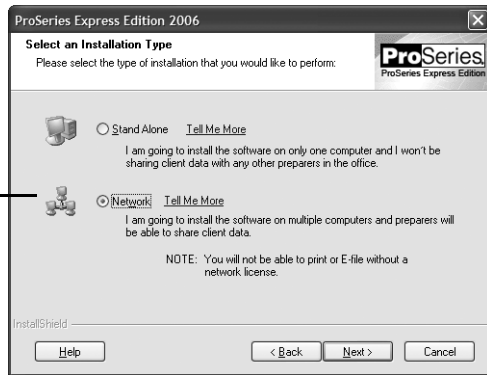
7 In the **Software License Agreement** dialog box, read the ProSeries Express Edition License Agreement to understand the scope of your rights to use ProSeries Express Edition software.

- Select **I accept the terms of the license agreement** if you agree to accept all the terms of the ProSeries Express Edition License Agreement, then click **Next** and continue to Step 8.
- Select **I do not accept the terms of the license agreement** if you don't agree to accept all the terms of the ProSeries Express Edition License Agreement, then click **Cancel** and exit the installation program.

Important: If you find the terms of the ProSeries Express Edition License Agreement unacceptable, *do not install the software*. Contact ProSeries Express Edition Customer Service for a refund instead.

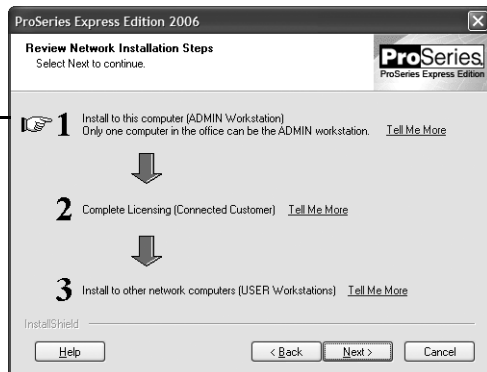
8 In the **Select an Installation Type** dialog box, select **Network**, then click **Next**.

Select **Network** to install ProSeries Express Edition for network use.



9 In the **Review Network Installation Steps** dialog box, review the summary of the three steps required for network installation, then click **Next**.

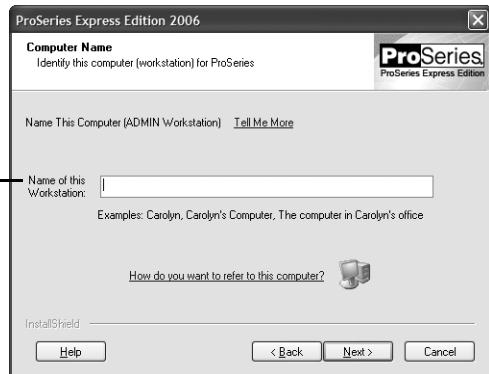
You're at the beginning of Step 1 now.



- 10** In the **Computer Name** dialog box, enter a name for the current workstation (such as “Admin” or the name of the person who typically uses the workstation), then click **Next**.

The name from the Windows **System Properties** dialog box appears here.

If you enter a different name for ProSeries Express Edition, that name won't be used by Windows or any other software.



- 11** In the **Choose Destination Location** dialog box, review the path shown in the **Local Folder** field and the path (if any) shown in the **Network Folder** path. Note the following:
- **Local Folder (this computer)**. This field shows **C:\ExpWin06** or **x:\ExpWin06** (where *x* represents the drive where last year's ProSeries Express Edition program was installed, not Drive X).
 - **Network Folder (shared data)**. This field shows a location similar to **C:\ProSeries\ExpNet06**, **C:\Netshare\ExpNet06**, **x:\ProSeries\ExpNet06**, or **x:\Netshare\ExpNet06** (where *x* represents a drive, but not necessarily Drive X), or it might be blank.

If you accept:

* The location shown in the **Local Folder** field, and

* The location shown in the **Network Folder** field (if a location is shown), then

Click **Next** and go to Step 14.



If you want to select a different local location, click this **Change** button. See Step 12 for instructions.

If you want to enter a network location or select a different network location, click this **Change** button. See Step 13 for instructions.

If you accept the recommended folders, click **Next** and proceed to Step 14.

If you don't accept the recommended folders:

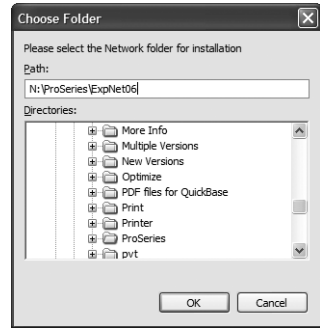
- **Local Folder**. Follow the instructions in Step 12 if you want to change the entry in the **Local Folder** field.
- **Network Folder**. Follow the instructions in Step 13 if you want to change the entry in the **Network Folder** field.

- 12 Local Folder**. To install the ProSeries Express Edition program to a local drive on the Admin workstation other than the drive that's shown in the **Local Folder (this computer)** field, first click the **Change** button to the right of the field to open the **Choose Folder** dialog box.

Next, take the following steps:

- Select the local drive where you want to install the ProSeries Express Edition program.
- Go to the **Path** field, type “ExpWin06” after the drive that you selected, then click **OK**.
- If you are prompted to create the ExpWin06 folder, click **Yes**.
- When you return to the **Choose Destination Location** dialog box, continue with Step 13.

13 Network Folder. To install the ProSeries Express Edition shared network components on a shared network drive other than the drive that’s shown in the **Network Folder (shared data)** field, first click the **Change** button to the right of the **Network Folder (shared data)** field to open the **Choose Folder** dialog box.



Next, take the following steps:

- Select the drive where you want to install the ProSeries Express Edition shared network components.
- Go to the **Path** field, type “ProSeries\ExpNet06” after the drive you selected, then click **OK**.
- If you are prompted to create the ProSeries or ExpNet06 directory on the drive that you’ve selected, click **Yes**.
- When you return to the **Choose Destination Location** dialog box, click **Next**. Continue with Step 14.

14 In the **Tax Year 2006 Product Selections** dialog box, select all the products that you expect to use for the 2006 tax year, then click **Next**. (If you used a ProSeries program for the 2005 tax year, the products that were installed last year may already be selected.)

These check boxes are for state products.

Instructions

Select the products that you plan to use this year in order to see if they are available for download.

Products not available now will be downloaded when available during future server connections or from future CDs.

State Products

	1040	1120	1120S	1065	1041	1040	1120	1120S	1065	1041
AL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LLC-568	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pass-Through	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SBT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M1PR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	(MN Property Tax)									
MO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ND	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NJ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pass-Through	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TX	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Federal Products

<input checked="" type="checkbox"/> 1040
<input checked="" type="checkbox"/> 1120
<input checked="" type="checkbox"/> 1120S
<input checked="" type="checkbox"/> 1065
<input checked="" type="checkbox"/> 1041
<input type="checkbox"/> 706
<input type="checkbox"/> 709
<input type="checkbox"/> 990/990EZ
<input checked="" type="checkbox"/> 1040 NR

Help **Back** **Next >** **Cancel**

This section explains how to use this dialog box.

These check boxes are for federal products.

Tip: If you select a state product, be sure to select the corresponding federal product.

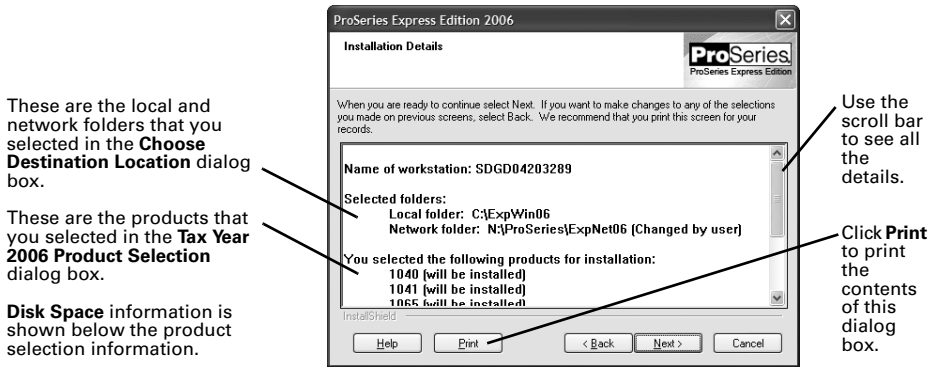
Tip: Every ProSeries Express Edition tax product for 2006 is shown in this dialog box, including products that may not be available yet. Select all ProSeries Express Edition tax products that you intend to use this tax season. You can install additional products later, as described in “Keeping your ProSeries Express Edition products up-to-date” on page 23. Any products you select here that you haven’t purchased as unlimited will be installed for pay-per-return use.

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<http://www.proseries.com>

- 15 If any of the products you selected aren't on the ProSeries Express Edition CD, you'll see the **Installation Note** dialog box. Review the list of products that will be installed later (when they become available), then click **OK**.
- 16 In the **E-mail Alert Registration** dialog box, click **Accept** or **Decline**, then click **Next**.

Tip: E-mail alerts inform you when the products you selected for installation become available or are updated. They also inform you about support issues and present information relevant to your ProSeries Express Edition products.
- 17 Review the **E-mail Alert Selection on Multiple Computers** dialog box, then click **OK**.
- 18 In the **Installation Details** dialog box, review the network installation details. If necessary, use the scroll bar to see information about all the products that are selected for installation, and to see information about required and available disk space.



Note the following about the sections of the **Installation Details** dialog box:

- **Selected folders**—If you entered or changed a location, you'll see "(Changed by user)."
- **Products selected for installation**—The status for each product is "(will be installed)" or "(not yet available)" depending on whether the product is included on the CD.

Important: Click **Print** so you can refer to this information if you need to contact Technical Support in the future.

If you want to change any of the information shown in the **Installation Details** dialog box, click the **Back** button to return to the applicable dialog box.

When you're ready to proceed with the installation procedure, click **Next**.

- 19 **Products installed.** The installation program installs all available ProSeries Express Edition tax products that you selected, then verifies that all applicable files were installed correctly.

Installation Failed dialog box. If you see the **Installation Failed** dialog box, a product was not installed properly. Click **Help** to find a possible solution, then click **Exit** to exit the installation program.
- 20 **Copy CD to network.** Wait while the contents of the ProSeries Express Edition CD are copied to the network folder. A dialog box and progress bar keep you informed.
- 21 **Additional components.** Wait while additional components, such as any necessary fonts, Internet Client software, the ProSeries Express Edition User's Guide, AnswerWorks® search engine software from Vantage Research®, and ProSeries Express Edition Product Licensing components are installed. Dialog boxes and progress bars keep you informed.
- 22 **Internet Explorer.** If Microsoft Internet Explorer 5.5, service pack 2 or later isn't installed on your computer, the installation program installs Internet Explorer 6.0 before continuing.

ProSeries Express Edition software requires portions of Internet Explorer 5.5, service pack 2 or later to run properly.

- 23 Restart Windows message.** Restart the computer if you are prompted to do so. When the installation program resumes, proceed to “Step 2: Complete Licensing (Connected Customer)” on page 14.

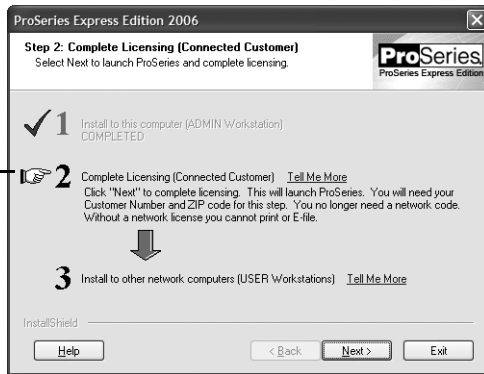
If the installation program doesn't resume after you restart the computer, start the ProSeries Express Edition program by double-clicking the **ProSeries Express Edition 2006** shortcut icon on the Windows desktop. The Connected Customer Wizard will begin automatically. Go to “Set up the ProSeries Express Edition program from the Admin workstation” on page 14.



Step 2: Complete Licensing (Connected Customer)

- 24** In the **Step 2: Complete Licensing (Connected Customer)** dialog box, review the summary of the next steps in the network installation process, then click **Next**.

You're at the beginning of Step 2 now.



- 25** If the installation program is able to launch the Connected Customer Wizard: The Connected Customer Wizard begins for the ProSeries Express Edition Admin workstation. Proceed to the next section, “Set up the ProSeries Express Edition program from the Admin workstation” now.

If the installation program isn't able to launch the Connected Customer Wizard:

You return to the **ProSeries Express Edition Installation** dialog box that's discussed in Step 4 on page 9. Click **Exit** to return to the Windows desktop then start the ProSeries Express Edition program by double-clicking the **ProSeries Express Edition 2006** shortcut icon. The Connected Customer Wizard will begin.

Continue with the next section, “Set up the ProSeries Express Edition program from the Admin workstation.”



Set up the ProSeries Express Edition program from the Admin workstation

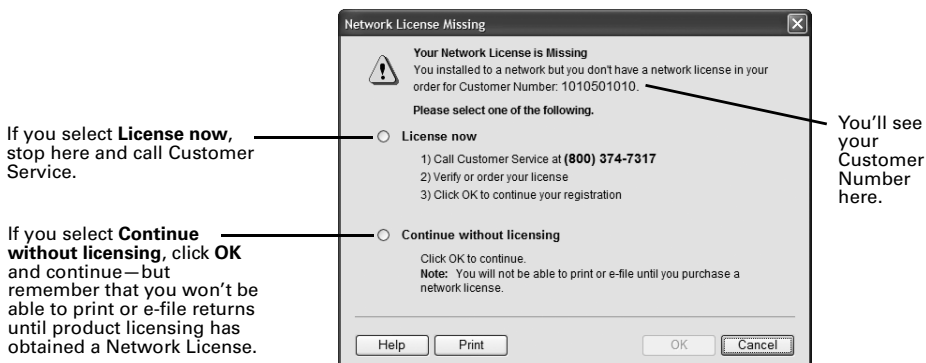
Important: The ProSeries Express Edition program should start from the ProSeries Express Edition Admin workstation the first time. Don't install the program on other workstations until you've set up the program from the ProSeries Express Edition Admin workstation.

- 26 Connected Customer Wizard.** The Connected Customer Wizard connects to an Intuit ProSeries Express Edition server via the Internet, then prompts you for your Customer Number and ZIP code. After you provide that information, the wizard:

- Retrieves your firm information
- Performs product licensing
- Checks the server for relevant products and product updates.

If the server has products or product updates that weren't available from the ProSeries Express Edition CD, the wizard downloads and installs those products and product updates.

27 Network License. If the product licensing information that's downloaded by the Connected Customer Wizard didn't include a Network License, you'll see the **Your Network License is Missing** dialog box.



Select **License now** then call Customer Service at 1-800-374-7317, or select **Continue without licensing** then click **OK**.

28 ProSeries Update. Wait while the ProSeries Update program downloads then installs any applicable products and product updates available via the Internet.

When the results of that process appear in the **ProSeries Update** dialog box, review the status of each product, select **Details** if you want to see more information, select **Print** if you want to print the information, then select **Close**.

29 Prior Year Settings Transferred dialog box. If the program transferred last year's ProSeries Express Edition preferences and settings, the **Prior Year Settings Transferred** dialog box appears. If you see the **Prior Year Settings Transferred** dialog box, review the information, then select **OK**.

The Options Setup Wizard will start if the program transferred electronic filing information from last year. Proceed to Step 31.

30 Offering electronic filing? If the program wasn't able to transfer last year's ProSeries Express Edition preferences and settings, or if it didn't transfer electronic filing information from last year, a dialog box will ask whether you plan to offer electronic filing. If you answer **Yes**, the Options Setup Wizard starts.

31 Options Setup Wizard. The Options Setup Wizard helps you set up certain parts of the program. For more information, see "Using the Options Setup Wizard" on page 17 of the ProSeries Express Edition Quick Reference Guide.

32 Network License. If your product licensing information still doesn't include a Network License, you'll see the **Your Network License is Missing** dialog box again. We strongly recommend that you contact Customer Service at 1-800-374-7317 to resolve the issue before you continue.

33 User workstation installation instructions. Next, you'll see the **Workstation Install Instructions** dialog box that lists the **Step 3: Install USER Workstations** instructions for installing and setting up the program on each user workstation in your network.

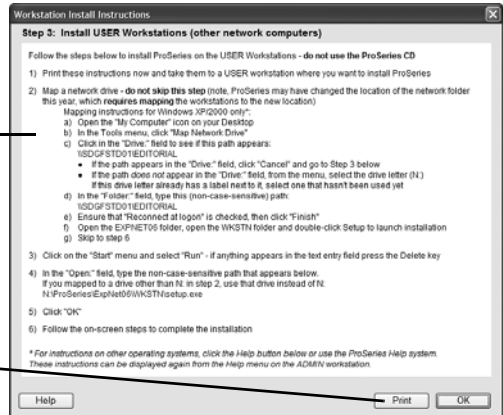
These instructions are specific to your system and are based on the destination location that was in the **Network Folder (shared data)** field in the **Choose Destination Location** dialog box when the installation program ran from the Admin workstation.

Important: We strongly recommend that you click **Print** so you can refer to a printed copy of the instructions in the **Step 3: Install USER Workstation** dialog box while you are installing the software and setting up each user workstation.

The following illustration shows an example of the **Workstation Install Instructions** dialog box.

The instructions you see are specific to your system and are based on the destination location in the **Network Folder (shared data)** field in the **Select Destination Location** dialog box.

Click here to print the instructions.



Tip: There are instructions for:

- A client-server network
- A peer-to-peer network where the ProSeries shared network components were installed to a local drive on a computer that isn't the ProSeries Admin workstation
- A peer-to-peer network where the ProSeries shared network components were installed to a local drive on the ProSeries Admin workstation
- Installations that used UNC instead of mapped drives

34 Transfer last year's client files? Next, you are asked if you want to transfer last year's client files. Select **Yes** or **No**.

Tip: The transfer procedure is a way to start your clients' ProSeries Express Edition 2006 client files using the relevant data in their ProSeries Express Edition 2005 (or ProSeries 2005) client files. The amount of time it takes to transfer client data depends on the computer and the number of client files involved. If you transfer data from client files now, when you subsequently start the program on a user workstation it takes some time for the program to synchronize with that data. For more information, see "Transferring data from ProSeries 2005 client files" on page 23 of the ProSeries Express Edition Quick Reference Guide.

Install ProSeries Express Edition software on each User workstation

After you've finished installing and setting up the program from the ProSeries Express Edition Admin workstation, take the following steps to install the ProSeries Express Edition program on each computer that will be used as a ProSeries Express Edition workstation.

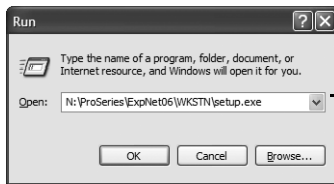
Step 3: Install to other network computers (USER workstations)

To install the ProSeries Express Edition program for network use on a user workstation:

- 1 Log on to the user workstation, then close all open applications and turn off any virus-protection utilities.
- 2 Go to the Windows taskbar, click **Start**, then select **Run**.
- 3 In the **Open** field in the **Run** dialog box, type the path that was shown in the instructions in the **Step 3: Install USER Workstations** dialog box that appeared when ProSeries Express Edition started on the ProSeries Express Edition Admin workstation.

For the ProSeries Express Edition program, that path will probably be `x:\ProSeries\ExpNet06\WKSTN\setup.exe`, where `x` represents a drive on your system, but not necessarily Drive X.

The next illustration shows the **Run** dialog box with an example of a path for the ProSeries Express Edition program that starts with Drive N.



This field is not case sensitive. Letters can be upper-case or lower-case.

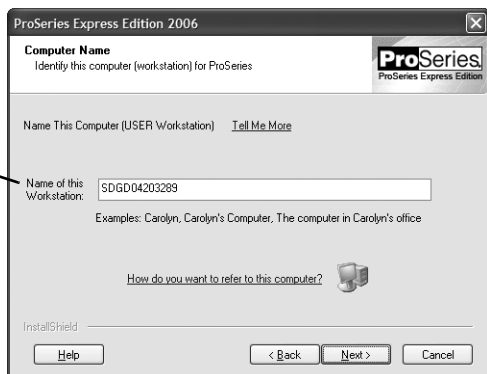
Tip: If the instructions in the **Step 3: Install USER Workstations** dialog box didn't include a path or if you have a problem typing the path in the **Open** field, click the **Browse** button, navigate to the `\ProSeries\ExpNet06\WKSTN\` folder in the **Browse** dialog box, then double-click the `setup.exe` file to enter the path in the **Open** field in the **Run** dialog box.

- 4 Select **OK** in the **Run** dialog box to start the User Workstation installation program.
- 5 In the **Welcome** dialog box, click **Next** when you're ready to continue.
- 6 If a **System Warning** dialog appears, see Step 6 on page 9 of this guide.
- 7 In the **Software License Agreement** dialog box, read the ProSeries Express Edition License Agreement, then select **I accept the terms of the license agreement** and click **Next**, or select **I do not accept the terms of the license agreement** and click **Cancel**. For more information, see Step 7 on page 10 of this guide.
- 8 In the **Computer Name** dialog box, enter a name for the current user workstation (such as the name of the person who typically uses the workstation), then click **Next**.

The name from the Windows **System Properties** dialog box appears here.

If you enter a different name for ProSeries Express Edition, that name won't be used by Windows or any other software.

Be sure to enter a unique name for each ProSeries Express Edition User workstation to avoid having duplicate workstation names.



9 In the **Choose Destination Location** dialog box, review the path shown in the **Local Folder** field. Note the following:

Local Folder. The **Local Folder (this computer)** field shows **C:\ExpWin06** or **x:\ExpWin06** (where *x* represents the local drive where last year's program was installed, not Drive X).



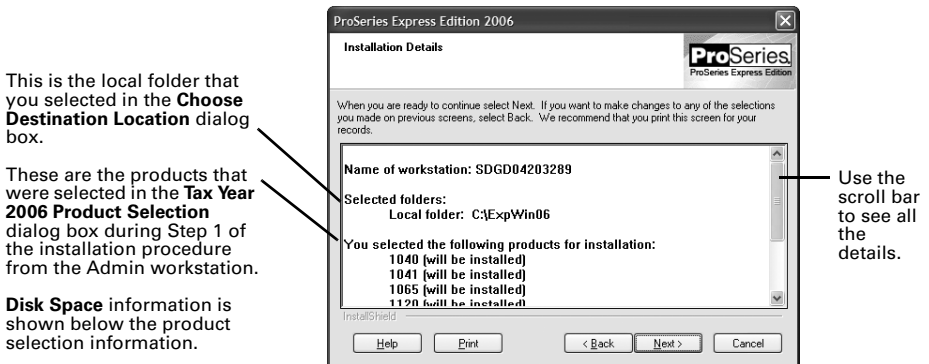
If you accept the recommended local folder, click **Next** and proceed to Step 11.

If you don't accept the recommended local folder, follow the instructions in Step 10.

10 Local Folder. To install the ProSeries Express Edition program on a local drive on the User workstation other than the drive that's shown in the **Local Folder (this computer)** field, click the **Change** button to the right of the **Local Folder (this computer)** field, then take the following steps:

- Select the local drive where you want to install the ProSeries Express Edition program.
- Go to the **Path** field, type the folder name "ExpWin06" after the drive you selected, then click **OK**.
- If you are prompted to create the ExpWin06 directory on the drive that you've selected, click **Yes**.
- When you return to the **Choose Destination Location** dialog box, continue with Step 11.

11 In the **Installation Details** dialog box, review the network installation details. If necessary, use the scroll bar to see information about all the products that are selected for installation, and to see information about required and available disk space.



Important: Click **Print** so you can refer to this information if you contact Technical Support in the future.

If you want to change information shown in the **Installation Details** dialog box, click the **Back** button to return to the applicable dialog box.

When you're ready to proceed with the installation procedure, click **Next**.

- 12** The installation program installs all available ProSeries Express Edition tax products that were selected during Step 1 of the installation procedure from the ProSeries Express Edition Admin workstation, then verifies that all applicable files were installed correctly.

Installation Failed dialog box. If you see the **Installation Failed** dialog box, a product was not installed properly. Click **Help** to find a possible solution, then click **Exit** to exit the installation program.

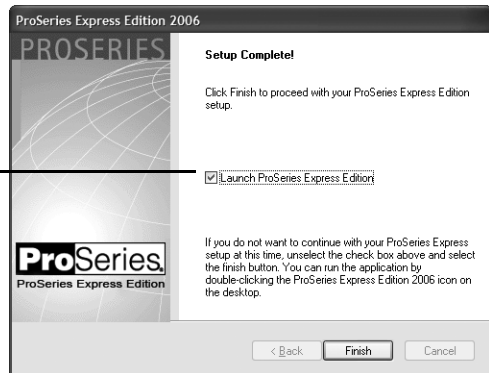
- 13 Additional components.** Wait while additional components, such as any necessary fonts, Internet Client software, AnswerWorks® search engine software from Vantage Research®, and ProSeries Express Edition Product Licensing components are installed. Dialog boxes and progress bars keep you informed.
- 14 Internet Explorer.** If Microsoft Internet Explorer 5.5, service pack 2 or later isn't installed on your computer, the installation program installs Internet Explorer 6.0 before continuing. ProSeries Express Edition software requires portions of Internet Explorer 5.5, service pack 2 or later to run properly.
- 15 Restart Windows message.** Restart the computer if you are prompted to do so. When the installation program resumes, proceed to Step 18 on page 19.

If the installation program doesn't resume after you restart the computer, start the ProSeries Express Edition program by double-clicking the **ProSeries Express Edition 2006** shortcut icon on the Windows desktop. Go to Step 18 on page 19.



- 16 Setup Complete.** In the **Setup Complete** dialog box, click **Finish**.

We recommend that you leave the checkmark in the **Launch ProSeries** check box.



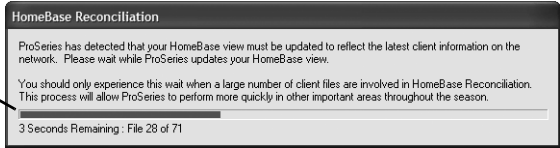
- 17 If the Launch ProSeries option was selected:** The ProSeries Express Edition program starts on the user workstation. Proceed to Step 18 now.

If the Launch ProSeries option wasn't selected: You return to the **ProSeries Express Edition Installation** dialog box that's discussed in Step 4 on page 9. Click **Exit** to return to the Windows desktop, then start the ProSeries Express Edition program by double-clicking the **ProSeries Express Edition 2006** shortcut icon. Continue with Step 18.



- 18 The HomeBase Reconciliation** dialog box appears if the ProSeries Express Edition program detects that the HomeBase database on the User workstation needs to be updated with the latest information in the client files stored with the shared network components.

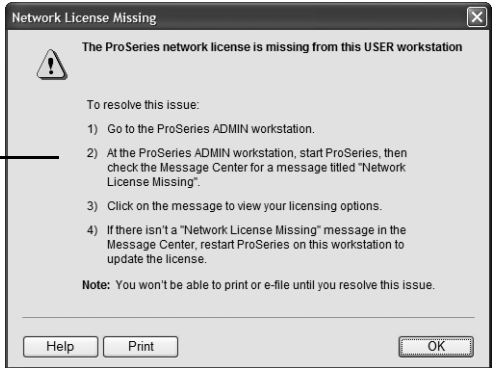
This progress bar keeps you informed about status of the HomeBase Reconciliation operation.



Important: The amount of time it takes for the program to update the HomeBase database on a User workstation depends on the number of client files that have been transferred, created, and/or edited since the last time the program started on that User workstation. When the HomeBase Reconciliation operation concludes, the program clears the **HomeBase Reconciliation** dialog box from the screen.

- 19 Options Setup Wizard.** The Options Setup Wizard starts and helps you set up certain parts of the program. For more information, see “Using the Options Setup Wizard” on page 17 of the ProSeries Express Edition Quick Reference Guide.
- 20** In the **E-mail Alert Registration** dialog box, click **Accept** or **Decline**, depending on whether or not you accept the terms of the E-mail Alerts system, then click **Next**.
- 21** Review the **E-mail Alert Selection on Multiple Computers** dialog box, then click **OK**.
- 22 Network License.** If the product licensing information that was downloaded by the Connected Customer Wizard didn’t include a Network License, you’ll see the **Network License Missing** dialog box shown next. Follow the instructions in this dialog box to resolve the situation.

These instructions explain how to resolve the situation.



Important: You can’t print or e-file returns until the product licensing information for your firm includes a Network License.

- 23 Transfer last year’s client files?** Next, you are asked if you want to transfer last year’s client files. Select **Yes** or **No**.
Tip: The transfer procedure is a way to start your clients’ ProSeries Express Edition 2006 client files using the relevant data in their ProSeries Express Edition 2005 client files. The time it takes to transfer client data depends on the computer and the number of client files involved. For more information, see “Transferring data from ProSeries Express Edition 2005 client files” on page 23 of the ProSeries Express Edition Quick Reference Guide.
- 24 Important:** Repeat Step 1 through Step 23 in “Install ProSeries Express Edition software on each User workstation” (beginning on page 16) for each computer that will be used as a ProSeries Express Edition user workstation.

Troubleshooting suggestions

Admin workstation

If you have difficulty installing or starting the software from the ProSeries Express Edition Admin workstation, see the troubleshooting suggestions in the following table.

If this situation occurs...	Do this...
A dialog box informs you that the computer doesn't have enough disk space	<ol style="list-style-type: none">1. Go to the Start menu, point to Programs, then Accessories, then System Tools, and then select Disk Cleanup.2. Try to install the ProSeries Express Edition software again.3. If there still isn't enough disk space, remove unused programs or data from the hard drive.
A dialog box informs you there was an error during the installation process	<ol style="list-style-type: none">1. Write down the error message, then restart the computer.2. Go to the Start menu, point to Programs, then Accessories, then System Tools, and then click ScanDisk.3. After ScanDisk is complete, go to the Start menu, point to Programs, then Accessories, then System Tools, and then select Disk Defragmenter.4. After Disk Defragmenter is finished, run your virus-protection software.5. Clean the ProSeries Express Edition CD with a soft cloth, then try to install the ProSeries Express Edition software again.
You can't install the ProSeries Express Edition software from the computer you've chosen to be the ProSeries Express Edition Admin workstation	If you haven't installed the ProSeries Express Edition software and there's another computer on the network that can function as the ProSeries Express Edition Admin workstation, go to that computer and try to install the ProSeries Express Edition software from the ProSeries Express Edition CD.
The ProSeries Express Edition program doesn't start when it should	<ol style="list-style-type: none">1. Restart the computer.2. Make sure no other applications are running.3. Double-click the ProSeries Express Edition 2006 icon on the Windows desktop.
You still are unable to install or start the ProSeries Express Edition program	Start your Internet browser, then go to http://www.proseries.com to search for additional troubleshooting solutions.
You are unable to resolve the problem	Call ProSeries Express Edition Technical Support at 800-557-5798. To save time, gather as much information as possible, and have your network administrator available.

User Workstations

If you have difficulty installing the ProSeries Express Edition software on a User workstation, see the troubleshooting suggestions in the following table.

If this situation occurs...	Do this...
The instructions in the Step 3: Install USER Workstations dialog box didn't include a path	<ol style="list-style-type: none">1. Click the Browse button in the Run dialog box.2. Navigate to the <code>\ProSeries\ExpNet06\WKSTN\</code> folder in the Browse dialog box.3. Double-click the setup.exe file to enter the path in the Open field in the Run dialog box.

<p>The installation program didn't start when you clicked OK in the Run dialog box</p>	<ol style="list-style-type: none"> 1. Press Ctrl-Alt-Del. 2. Look for SETUP.EXE in the Close Program dialog box. If SETUP.EXE is listed more than once, highlight one SETUP.EXE and select End Task. 3. Repeat these steps until only one SETUP.EXE is listed in the Close Program dialog box.
<p>You aren't able to start the installation program from the Run dialog box</p>	<ol style="list-style-type: none"> 1. Start Windows Explorer. 2. Find the ProSeries folder in the shared folder. 3. Select the ExpNet06 directory, then select the WKSTN directory. 4. Double-click the SETUP.EXE file.
<p>You are unable to find the WKSTN folder, and the drive where the ProSeries Express Edition software is installed is mapped</p>	<ol style="list-style-type: none"> 1. Double-click My Computer on the desktop. 2. If the mapped drive has a red X, contact your network administrator for help verifying the network connection. 3. Double-click the mapped drive in the My Computer dialog box. 4. Double-click the ExpNet06 folder, then locate the WKSTN folder.
<p>You are unable to find the WKSTN folder, and the drive where the ProSeries Express Edition software is installed isn't mapped</p>	<ol style="list-style-type: none"> 1. Double-click Network Neighborhood or My Network Places on the desktop. 2. If the server does not show up in a window, contact your network administrator for help verifying the network connection. 3. Double-click the server icon. 4. Double-click the shared folder where you installed the ProSeries Express Edition software. 5. Double-click the ExpNet06 folder, then locate the WKSTN folder.
<p>The installation program didn't start when you double-clicked the SETUP.EXE file</p>	<ol style="list-style-type: none"> 1. Press Ctrl-Alt-Del. 2. Look for SETUP.EXE in the Close Program dialog box. If SETUP.EXE is listed more than once, highlight one SETUP.EXE and select End Task. 3. Repeat these steps until only one SETUP.EXE is listed in the Close Program dialog box.
<p>You see an error message or can't resolve a problem</p>	<p>Call ProSeries Express Edition Technical Support at 800-557-5798. To save time, gather as much information as possible, and have your network administrator available.</p>

Keeping your ProSeries Express Edition products up-to-date

You can use the following methods to update ProSeries Express Edition products that were previously installed and to install ProSeries Express Edition products that haven't been installed yet.

Important: Most product updating activities must be performed from the ProSeries Express Edition Admin workstation.

Task Scheduler

The Task Scheduler program can keep your ProSeries Express Edition tax products up to date automatically.

- 1 Go to the ProSeries Express Edition Admin workstation and start the ProSeries Express Edition program.
- 2 Go to the **Tools** menu, select **Options**, then select **Task Scheduler**.
- 3 Make sure the **Download New/Update Existing Products** task is enabled.

Important: When Task Scheduler installs a new ProSeries Express Edition tax product or updates an existing ProSeries Express Edition tax product in the shared folder, that new product or product update becomes available to all the workstations on which the ProSeries Express Edition program is installed for network use. However, if ProSeries Express Edition is running on a user workstation, exit the program then restart it to copy the new products and product updates to the local folder on that user workstation.

To see more information about Task Scheduler after you finish setting up the program:

- Use the Search Help feature on the Help toolbar and in the Help Center, or
- Go to the Help Center, select **User's Guide**, then go to chapter 8, "Using Task Scheduler."

ProSeries Express Edition Update menu

You can initiate the product updating from the ProSeries Express Edition **Update** menu.

- 1 Go to the ProSeries Express Edition Admin workstation and start the ProSeries Express Edition program.
- 2 Go to the **Update** menu and select **Select and Download New Products** or **Update Installed Products**.
- 3 If you selected **Select and Download New Products** and you want to select additional products for installation, select those products in the **Tax Year 2006 Product Selections** dialog box before you select **Next** in that dialog box.

Important: When the product updating procedure installs a new ProSeries Express Edition tax product or updates an existing ProSeries Express Edition tax product in the shared folder, that new product or product update becomes available to all the user workstations on which the ProSeries Express Edition program is installed for network use.

To see more information about the **Select and Download New Products** and **Update Installed Products** commands:

- Use the Search Help feature on the Help toolbar and in the Help Center, or
- Go to the Help Center, select **User's Guide**, then go to chapter 1, "Installing ProSeries Express Edition."

ProSeries Express Edition CDs

You can update installed products and install new products from ProSeries Express Edition CDs that you receive in the future using the installation program on the ProSeries Express Edition CD.

Important: The products and product updates on a ProSeries Express Edition CD are the same products and product updates that are available for download days or weeks before you receive the ProSeries Express Edition CD.

Important: When you update installed products and install new products from ProSeries Express Edition CDs that you receive, you must run the installation program on the ProSeries Express Edition CD from the ProSeries Express Edition Admin workstation **before** you run it from each user workstation on which the ProSeries Express Edition program was previously installed for network use.

- 1 Go to the ProSeries Express Edition Admin workstation and make sure the ProSeries Express Edition program isn't running.
- 2 Insert the ProSeries Express Edition CD into the appropriate drive of the ProSeries Express Edition Admin workstation.
- 3 Follow the installation instructions on the screen.
- 4 If you see the **Updates Available** dialog box, click **Update**.
If you see the **All Products are Up-To-Date** dialog box, click **Exit**.
- 5 Go to a workstation on which ProSeries Express Edition program was installed for network use and make sure the ProSeries Express Edition program isn't running.
- 6 Go to the Windows taskbar, click **Start**, then select **Run**.
- 7 In the **Open** field in the **Run** dialog box, type the path that you typed when you installed the ProSeries program on that user workstation.

That path will probably be `x:\ProSeries\ExpNet06\WKSTN\setup.exe`, where *x* represents a drive on your system, but not necessarily Drive X.

Tip: This is the path that was shown in the instructions in the **Step 3: Install USER Workstations** dialog box that appeared the first time ProSeries Express Edition started on the ProSeries Express Edition Admin workstation.

- 8 Follow the installation instructions on the screen.
- 9 If you see the **Updates Available** dialog box, click **Update**.
If you see the **All Products are Up-To-Date** dialog box, click **Exit**.
- 10 Repeat Step 5 through Step 9 for each additional workstation on which the ProSeries Express Edition program is installed for network use.

To see more information about installing and updating ProSeries Express Edition tax products from ProSeries Express Edition CDs:

- Use the Search Help feature on the Help toolbar and in the Help Center, or
- Go to the Help Center, select **User's Guide**, then go to chapter 1, "Installing ProSeries Express Edition."