Before you install ProSeries® software for network use

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

Important: Before you begin installing 2008 ProSeries software, be sure to read pages 1 through 8 of the ProSeries 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:

1. Start your Internet browser, then go to http://www.proseries.com.
2. From the ProSeries.com home page, select **Support.**
3. Type a word, phrase, or question in the **Search the Knowledge Base** field, then select **Search**.

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

Summary of the network installation process

Following is a summary of how to prepare your networked system and then install ProSeries 2008 software for network use. Note that certain details vary from system to system.

Tip: For more detailed information, refer to the applicable sections of this guide.

Prepare to install the network version of the ProSeries program

Take the following steps before you begin the ProSeries installation procedure.

Tip: 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 2008 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 **ProNet08**.
5. Decide which computer will be the ProSeries Admin workstation.
6. Make sure a drive is mapped to the **ProSeries** folder on the server or serving computer, and make sure the ProSeries Admin workstation has the appropriate rights and permissions.
7. Go to each computer that will serve as a ProSeries User workstation, then make sure a drive is mapped to the **ProSeries** folder on the server or serving computer, and make sure each ProSeries User workstation has the appropriate rights and permissions.

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

From the computer that will be the ProSeries Admin workstation:

1. Insert the ProSeries CD into the appropriate drive to start the ProSeries 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)**.

   Tip: If you installed last year's ProSeries software for Stand Alone use on the same computer, a dialog box asks you to confirm that you want to install this year's ProSeries software for Network use.
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 **ProWin08** 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 **ProNet08** folder within the **ProSeries** folder that you created on the server or serving computer. For example, select **T:\ProSeries\ProNet08**.
4. In the **Tax Year 2008 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 User workstation

From each ProSeries 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.
3. In the **Choose Destination Location** dialog box, accept **C:\ProWin08** as the recommended location for the **Local Folder**, or select a different local drive for the **ProWin08** folder.

Computer system requirements

Page 3 of the ProSeries Quick Reference Guide lists the computer system requirements for ProSeries 2008. The following table lists additional system requirements for network operation. For more information about how system requirements can affect the operation of the ProSeries 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 2000 client files Dedicated File/Application server, 3.0 GHz CPU or faster or a Multi-Core processor if more than 2000 client files	1.0 GHz CPU as a dedicated File/Application server or host on a peer-to-peer network **Note:** If the File Server is also a workstation, use the applicable recommended requirement (i.e., 2.0 GHz or 3.0 GHz)
File Server memory	1 GB RAM or more More memory normally results in improved performance	512 MB RAM 1 GB RAM if the File Server is also a workstation
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.	At least 850 MB More space may be required if you install many products or prepare a large number of returns.
File Server operating system	If less than 2000 client files, one of the following: • Windows XP Professional edition, (service pack 3 or later) • Windows Vista Business or Ultimate edition (service pack 1 or later) If more than 2000 client files, one of the following: • Windows 2003 Server (service pack 2 or later) • Windows 2008 Server	Windows XP Home edition, (service pack 3 or later) **Note:** ProSeries software for the 2008 tax year shouldn't be installed on a computer with a Windows 2000, Windows NT, Windows 98, Windows ME, or Novell Netware operating system.
Workstation computer	2.0 GHz or faster if less than 2000 client files 3.0 GHz or faster or Multi-Core processor if more than 2000 client files	800 MHz if less than 2000 client files 1 GHz if more than 2000 client files
Workstation memory	1 GB RAM or more **Note:** Add 1 GB RAM for each additional 2000 client files.	512 MB RAM **Note:** For Vista, we recommend at least 1 GB RAM.
Workstation hard disk space	2 GB or more	1.2 GB
Workstation operating system	Windows XP Professional edition, (service pack 3 or later) Windows Vista Business edition, (service pack 1 or later)	Windows XP Home or Media edition, (service pack 3 or later) Windows Vista Home Basic, Home Premium, or Ultimate edition, (service pack 1 or later)
Workstation screen resolution	1024 x 768 or higher	1024 x 768 or higher

Network Component	Recommendation	Minimum Requirement
Network infrastructure	100 Mbps optimized connection environment (Network Interface Cards, Cat V cabling, switches, and routers) A WAN is recommended for customers with multiple locations and more than 2000 client files.	54 Mbps optimized connection environment including wireless environments (Network Interface Cards, Cat V cabling, switches, and routers)
Internet Browser	Microsoft Internet Explorer 6.0 **Note:** Internet Explorer 6.0 is installed if Internet Explorer 6.0 or later isn't already installed.	
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 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 2000 client files High-speed Internet connection, such as T-1, DSL, or cable modem if more than 2000 client files

Factors for deciding how to install and use ProSeries software

Important: If you are going to install ProSeries 2008 software for network use, we strongly recommend that you purchase ProSeries/Network Version (if you haven't already) before you begin the software installation process. If you haven't purchased ProSeries/Network Version, the ProSeries software won't be licensed for network use, and you won't be able to print or e-file returns until your product licensing information includes a Network License.

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

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

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

To use ProSeries software this way...	Install the program this way...
Each preparer maintains an independent set of clients	Go to each computer and install ProSeries software for stand-alone use.
Preparers share clients and regularly review returns for other preparers	**1.** Go to the computer that you choose to be the ProSeries Admin workstation, then install ProSeries software for network use. You'll (a) install ProSeries network components to a shared folder, and (b) install and set up the ProSeries program on that computer's hard drive. **2.** Go to each computer that will serve as a User workstation that runs the ProSeries program and accesses the ProSeries network components from the shared folder, then install and set up the ProSeries program.

To use ProSeries software this way...	Install the program this way...
Preparers work in the office sharing and reviewing returns. Some preparers use laptop or notebook computers to begin and prepare returns at client sites.	1. Go to the computer that you choose to be the ProSeries Admin workstation, then install ProSeries software for network use. You'll (a) install ProSeries network components to a shared folder, and (b) install and set up the ProSeries program on that computer's hard drive. 2. Go to each computer that will serve as a User workstation that runs the ProSeries program and accesses the ProSeries network components from the shared folder, then install and set up the ProSeries program. 3. Go to each laptop or notebook computer, then install and set up ProSeries 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 Software License Agreement), install ProSeries software for stand-alone use on the hard drive of that laptop or notebook computer.

Important: If you install ProSeries 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 software for network use:

This feature...	Offers this advantage with network use...
Internet connection	Only the ProSeries Admin workstation (which is the computer from which you install ProSeries software) needs an Internet connection.
Client file locking	The ProSeries 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 Admin workstation.
ProSeries options and features	Users can set up most ProSeries options and features on their workstations. **Note:** Some ProSeries 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 workstations in the network.

Prepare your networked computer system

Before you can install ProSeries 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).
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 Admin workstation	The computer from which ProSeries software is installed to the server or serving computer. You can designate any computer to be the ProSeries Admin workstation (including the network administrator's computer), but once you choose a ProSeries Admin workstation, it should remain the ProSeries Admin workstation throughout the tax season.
ProSeries User workstation	A computer that runs the ProSeries program and accesses the ProSeries network components from the shared folder.
Shared folder	The folder that is set up by the Network Administrator to be shared in the network system. The ProSeries shared folder is the location where ProSeries network components and client files reside. (Note: "Folder" and "directory" are synonyms.)
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 Admin workstation.

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 ProSeries, 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 Admin workstation. Use the following information to help you decide.

- **Internet access.** The computer that you select to be the ProSeries Admin workstation should have an Internet connection because product updating via the Internet must be done at the ProSeries 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 software from the ProSeries Admin workstation to the server's hard drive. With this type of system, the ProSeries Admin workstation and the server are two different computers. The ProSeries Admin workstation can be used as a workstation, but the server is **not** used as a workstation.
  - **Peer-to-peer network.** You install ProSeries software on the ProSeries Admin workstation's hard drive. With this type of system, the ProSeries 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 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, Client Analyzer New Query Notifications, Database Maintenance, and HomeBase Tune-up.

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

Step 2 - Create a shared folder named ProSeries

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

- Create a folder on the drive to which you will be installing ProSeries 2008 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 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. For best results, use **ProSeries** as the name of the shared folder within which you will install the shared network components for the ProSeries software. This will be the shared folder that all workstations will access when running the ProSeries program. If you install the network version of ProSeries 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 2007 shared network components to a folder within a shared folder that had a name other than **ProSeries**, you can install ProSeries 2008 shared network components to another folder within that shared folder. For example, if you installed ProSeries 2007 shared network components to **ProNet07** within a shared folder named **Netshare**, you can install ProSeries 2008 shared network components to **ProNet08** 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 2008 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 that 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 shared network components, 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 (rather than UNC), and that the drive with the ProSeries 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 network user and have all computers mapped to the same drive letter, you don't have to change anything. Install ProSeries software as you did in prior years.

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 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 software for the first time, you can install ProSeries 2008 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 program integrates properly with software such as ProSeries\Practice Manager and ProSeries\Fixed Asset Manager only if the ProSeries software is installed to mapped drives.

Step 4 - Review Workstation operating system access rights

You will install ProSeries files to a **ProNet08** folder in a shared folder. There will also be a **ProPDF** folder (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 shared network components.
- **Windows-based servers.** If you're using 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 access rights, refer to your network vendor's documentation.

Install and set up ProSeries software from the Admin workstation

Installing and setting up ProSeries 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 software so multiple computers (also known as workstations) can use the program in a networked environment, you install the software from the first ProSeries CD that you receive (or via the Internet from ProSeries.com). Each ProSeries CD contains the latest version of every ProSeries tax product that is currently available.

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

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

Before you install ProSeries software for the 2008 tax year, note the following information:

- **Release Notes.** Read the printed Release Notes and any other material that accompanied the ProSeries CD.

  THE RELEASE NOTES MAY CONTAIN, AMONG OTHER THINGS, ADDITIONAL LICENSING TERMS THAT GOVERN THE USE OF THE PROSERIES SOFTWARE AND RELATED SERVICES.

- **Packing slip.** The packing slip that accompanied the ProSeries CD contains your Customer Number and ZIP code, which is information that 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/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 software for network use from the ProSeries Admin workstation:

Step 1: Install to this computer (ADMIN workstation)

1. Go to the ProSeries Admin workstation.
2. Close all open applications and turn off any virus-protection utilities.
3. **If you're installing from a ProSeries CD**, insert the ProSeries CD into the appropriate drive. Don't remove the CD from the drive until the installation process is complete.

   If you're installing from an .EXE file that you downloaded from ProSeries.com, start Windows Explorer, go to C:\Temp, then double-click the .EXE file.
4. In the **ProSeries Installation** dialog box, click **Install ProSeries Software**.

   If the **ProSeries 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 CD), then click **OK**.

c. When the **ProSeries 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 2008 software. (For more information, see "Computer system requirements" on page 3.)

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 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 program.

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

- Select **I accept the terms of the license agreement** if you agree to accept all the terms of the ProSeries 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 License Agreement, then click **Cancel** and exit the installation program.

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

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

Select **Network** here if it isn't already selected.

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, 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.

12 Note the following:

- **Local Folder (this computer).** This field shows **C:\ProWin08** or ***x*:\ProWin08** (where ***x*** represents the drive where last year's ProSeries program was installed, not Drive X).
- **Network Folder (shared data).** This field shows a location similar to **C:\ProSeries\ProNet08**, **C:\Netshare\ProNet08**, ***x*:\ProSeries\ProNet08,** or ***x*:\Netshare\ProNet08** (where ***x*** represents a drive, but not necessarily Drive X), or it might be blank.

If you accept the recommended folders, click **Next** and proceed to Step 15 .

If you don't accept the recommended folders:

- **Local Folder.** Follow the instructions in Step 13 if you want to change the entry in the **Local Folder** field.
- **Network Folder.** Follow the instructions in Step 14 if you want to change the entry in the **Network Folder** field.

13 **Local Folder.** To install the ProSeries 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 **Local Folder (this computer)** field to open the **Choose Folder** dialog box.

Next, take the following steps:

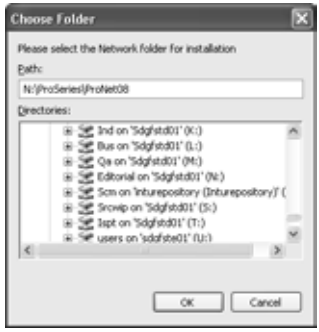
a. Select the local drive where you want to install the ProSeries program.

b. Go to the **Path** field, type "ProWin08" after the drive that you selected, then click **OK**.

c. If you are prompted to create the ProWin08 folder, click **Yes**.

d. When you return to the **Choose Destination Location** dialog box, continue with Step 14 .

14 **Network Folder.** To install the ProSeries shared network components to a location other than the location 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:

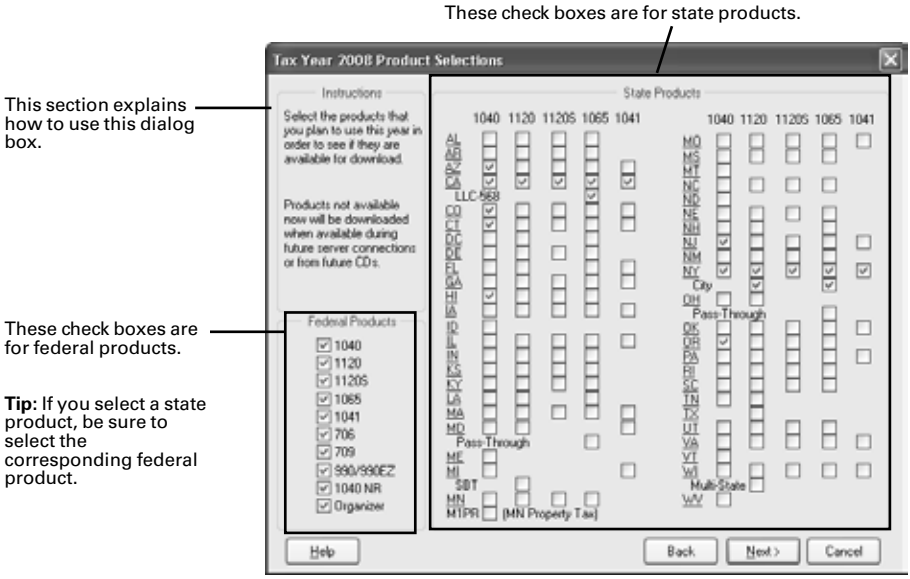
a. Select the drive where you want to install the ProSeries shared network components.

b. Go to the **Path** field, then type "ProSeries\ProNet08" after the drive you selected, then click **OK**.

c. If you are prompted to create the ProSeries or ProNet08 folder on the drive that you've selected, click **Yes**.

d. When you return to the **Choose Destination Location** dialog box, click **Next**. Continue with Step 15 .

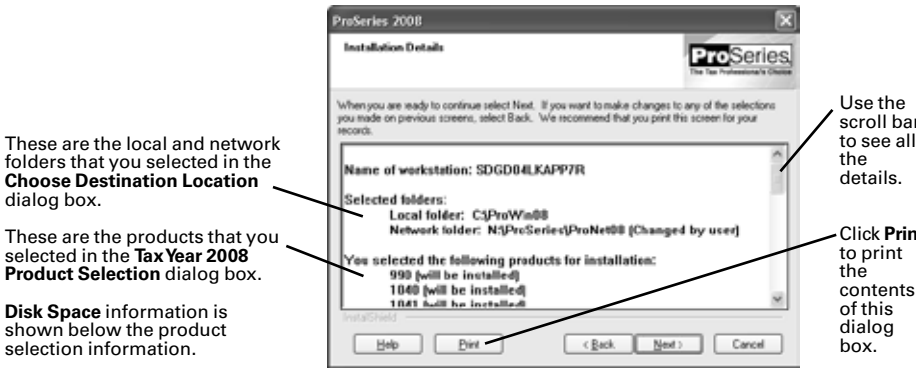
15 In the **Tax Year 2008 Product Selections** dialog box, select all the products that you expect to use for the 2008 tax year, then click **Next**. (If you used a ProSeries program for the 2007 tax year, the products that were installed last year may already be selected.)



Tip: Every ProSeries tax product for 2008 is shown in this dialog box, including products that may not be available yet. Select all ProSeries tax products that you intend to use this tax season. You can install additional products later, as described in "Keeping your ProSeries 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.

16 If any of the products you selected aren't on the ProSeries 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**.

17 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 contents 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 ProSeries CD.

Important: Click **Print** so you can refer to this information if you 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**.

18 **Products installed.** Wait while the installation program installs all available ProSeries 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.

19 **Copy CD to network.** Wait while the contents of the ProSeries CD are copied to the network folder. A dialog box and progress bar keep you informed.

20 **Additional components.** Wait while additional components, such as any necessary fonts, Internet Client software, the **ProSeries User's Guide**, search engine software, a PDF print driver, and ProSeries Product Licensing components are installed. Dialog boxes and progress bars keep you informed.

21 **Internet Explorer.** If Microsoft Internet Explorer 6.0 or later isn't installed on your computer, the installation program installs Internet Explorer 6.0 before continuing. ProSeries software requires portions of Internet Explorer 6.0 or later to run properly.

22 **Restart Windows message.** Restart the computer if you are prompted to do so. When the installation program resumes, proceed to the next section, "Step 2: Complete Licensing (Connected Customer)".

If the installation program doesn't resume after you restart the computer, start the ProSeries program by double-clicking the **ProSeries 2008** shortcut icon on the Windows desktop.

The Connected Customer Wizard will begin automatically. Go to "Set up the ProSeries program from the Admin workstation" on page 14.

Step 2: Complete Licensing (Connected Customer)

23 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**.

24 **If the installation program is able to launch the Connected Customer Wizard:** The Connected Customer Wizard begins for the ProSeries Admin workstation. Proceed to the next section, "Set up the ProSeries program from the Admin workstation" now.

If the installation program isn't able to launch the Connected Customer Wizard: You return to the **ProSeries Installation** dialog box. Click **Exit** to return to the Windows desktop, then start the ProSeries program by double-clicking the **ProSeries 2008** shortcut icon.

The Connected Customer Wizard will begin. Continue with the next section, "Set up the ProSeries program from the Admin workstation."

Set up the ProSeries program from the Admin workstation

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

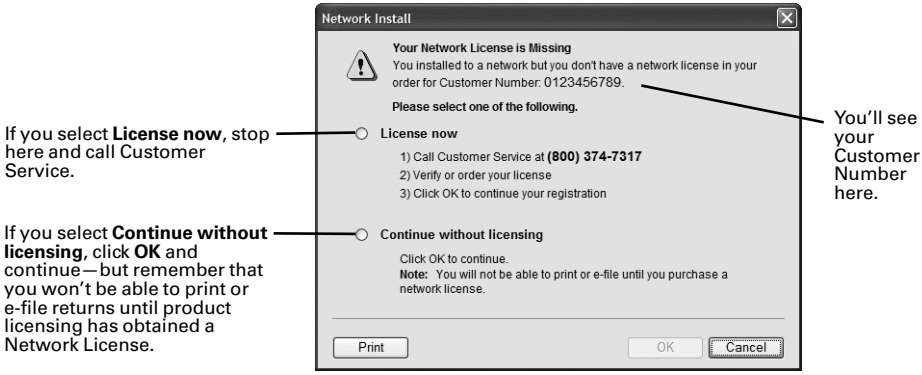
Tip: The ProSeries Quick Reference Guide contains more information about several of the features that are discussed next.

25 Connected Customer Wizard. The Connected Customer Wizard connects to an Intuit ProSeries 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 CD, the wizard downloads and installs those products and product updates.

26 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**.

27 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**.

28 Prior Year Settings Transferred dialog box. If the program transferred last year's ProSeries preferences and settings, the **Prior Year Settings Transferred** dialog box appears. If you see this 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 30 .

29 Offering electronic filing? If the program wasn't able to transfer last year's ProSeries 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.

30 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 Quick Reference Guide.

31 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.

32 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 ProSeries 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 is an example of the **Workstation Install Instructions** dialog box.

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

33 **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 2008 client files using the relevant data in their ProSeries 2007 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 2007 client files" on page 21 of the ProSeries Quick Reference Guide.

Install ProSeries software on each User workstation

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

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

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

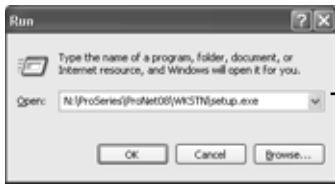
1 Log on to the user workstation, then close any open applications and turn off any virus-protection utilities.

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 started on the ProSeries Admin workstation.

That path will probably be ***x*:\ProSeries\ProNet08\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 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\ProNet08\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 10 of this guide.

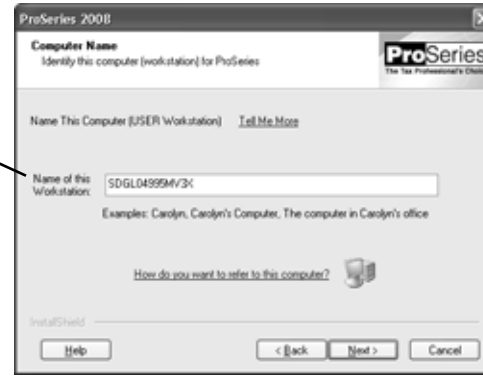
7 In the **Software License Agreement** dialog box, read the ProSeries License Agreement, then select **I accept the terms of the license agreement** and click **Next**, or select **I do not accept the terms of the license agreement** and click **Cancel**. For more information, see Step 7 on page 10 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, that name won't be used by Windows or any other software.

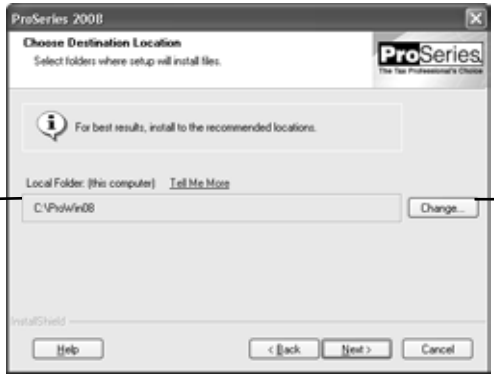
Be sure to enter a unique name for each ProSeries User workstation to avoid having duplicate workstation names.



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

Local Folder (this computer). The **Local Folder (this computer)** field shows **C:\ProWin08** or ***x*:\ProWin08** (where ***x*** represents the local drive where last year's ProSeries program was installed, not Drive X).

If you accept the location shown in the **Local Folder** field, click **Next** and go to Step 11 .



If you want to select a different local location, click the **Change** button, then see Step 10 for instructions.

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 program to a local drive on the User workstation other than the drive that's shown in the **Local Folder (this computer)** field, click the **Browse** button to the right of the **Local Folder (this computer)** field to open the **Choose Folder** dialog box, then take the following steps:

a. Select the local drive where you want to install the ProSeries program.

b. Go to the **Path** field, type the folder name "ProWin08" after the drive you selected, then click **OK**.

c. If you are prompted to create the ProWin08 folder on the drive that you've selected, click **Yes**.

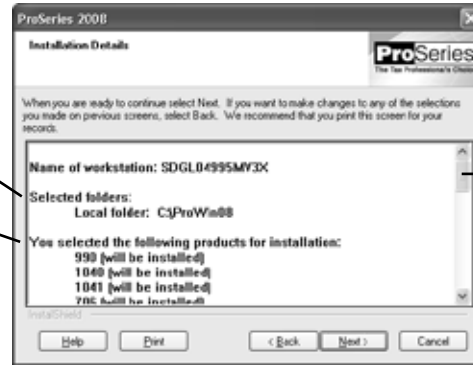
d. When you return to the **Choose Destination Location** dialog box, continue with Step 11 .

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.

This is the local folder that was selected in the **Choose Destination Location** dialog box.

These are the products that were selected in the **Tax Year 2008 Product Selection** dialog box during Step 1 of the installation procedure from the Admin workstation.

Disk Space information is shown below the product selection information.



Use the scroll bar to see all the details.

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 tax products that were selected from the ProSeries Admin workstation during Step 1 of the installation procedure, 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, search engine software, a PDF print driver, and ProSeries Product Licensing components are installed. Dialog boxes and progress bars keep you informed.

14 **Internet Explorer.** If Microsoft Internet Explorer 6.0 or later isn't installed on your computer, the installation program installs Internet Explorer 6.0 before continuing. ProSeries software requires portions of Internet Explorer 6.0 or later to run properly.

15 **Restart Windows message.** Restart the computer if you are prompted to do so. When the installation program resumes, go to Step 18 on page 19.

If the installation program doesn't resume after you restart the computer, start the ProSeries program by double-clicking the **ProSeries 2008** shortcut icon on the Windows desktop. Go to Step 18 on page 19.

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

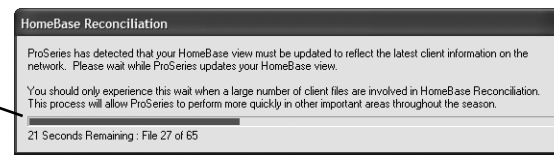
17 If the **Launch ProSeries** option was selected: The ProSeries program starts on the user workstation. Go to Step 18 now.

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

If the Launch ProSeries option wasn't selected: You return to the **ProSeries Installation** dialog box. Click **Exit** to return to the Windows desktop, then start the ProSeries program by double-clicking the **ProSeries 2008** shortcut icon. Continue with Step 18 .

18 The **HomeBase Reconciliation** dialog box appears if the ProSeries 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.

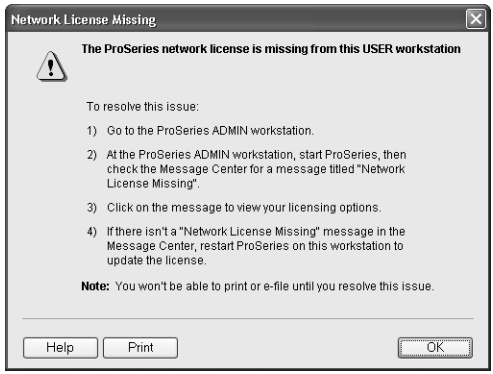


Important: The amount of time it takes for the program to update the HomeBase database on a User workstation depends on the number of client files that have been transferred, created, and/or edited since the last time the program started on that User workstation.

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" in the ProSeries Quick Reference Guide.

20 **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.



Important: You can't print or e-file returns until your ProSeries software is properly licensed and the product licensing information for your firm includes a Network License.

21 **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 2008 client files using the relevant data in their ProSeries 2007 client files. The amount of 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 2007 client files" in the ProSeries Quick Reference Guide.

22 **Important:** Repeat Step 1 through Step 21 in "Install ProSeries software on each User workstation"workstation" (beginning on page 16) for each computer that will be used as a ProSeries user workstation.

Troubleshooting suggestions

Admin workstation

If you have difficulty installing or starting the ProSeries software from the ProSeries 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	**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 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	**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 CD with a soft cloth, then try to install the ProSeries software again.
You can't install the ProSeries software from the computer you've chosen to be the ProSeries Admin workstation	If you haven't installed the ProSeries software and there's another computer on the network that can function as the ProSeries Admin workstation, go to that computer and try to install the ProSeries software from the ProSeries CD.
The ProSeries program doesn't start when it should	**1.** Restart the computer. **2.** Make sure no other applications are running. **3.** Double-click the **ProSeries 2008** icon on the Windows desktop.
You still are unable to install or start the ProSeries 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 Technical Support at 800-434-6818. To save time, gather as much information as possible, and have your network administrator available.

User Workstations

If you have difficulty installing the ProSeries 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	**1.** Click the **Browse** button in the Run dialog box. **2.** Navigate to the \ProSeries\ProNet08\WKSTN\ 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.
The installation program didn't start when you clicked **OK** in the **Run** dialog box	**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.
You aren't able to start the installation program from the **Run** dialog box	**1.** Start Windows Explorer. **2.** Find the ProSeries folder in the shared folder. **3.** Select the ProNet08 folder, then select the WKSTN folder. **4.** Double-click the SETUP.EXE file.
You are unable to find the WKSTN folder, and the drive where the ProSeries software is installed is mapped	**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 to open it. **4.** Double-click the ProNet08 folder, then locate the WKSTN folder.
You are unable to find the WKSTN folder, and the drive where the ProSeries software is installed isn't mapped	**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 software. **5.** Double-click the ProNet08 folder, then locate the \WKSTN folder.
The installation program didn't start when you double-clicked the SETUP.EXE file	**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.
You see an error message or can't resolve a problem	Call ProSeries Technical Support at 800-434-6818. To save time, gather as much information as possible, and have your network administrator available.

Keeping your ProSeries products up-to-date

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

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

Task Scheduler

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

1. **Go to the ProSeries Admin workstation and start the ProSeries 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 tax product or updates an existing ProSeries tax product in the shared folder, that new product or product update becomes available to all the workstations on which the ProSeries program is installed for network use. However, if ProSeries 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
- Click the **Help** button on the toolbar, select **User's Guide** in the Help Center, then go to chapter 5, "Task Scheduler."

ProSeries Update menu

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

1. Go to the ProSeries Admin workstation and start the ProSeries 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 2008 Product Selections** dialog box before you select **Next** in that dialog box.

Important: When the product updating procedure installs a new ProSeries tax product or updates an existing ProSeries tax product in the shared folder, that new product or product update becomes available to all the user workstations on which the ProSeries 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
- Click the **Help** button on the toolbar, select **User's Guide** in the Help Center, then go to chapter 2, "Updating ProSeries Tax Products."

ProSeries CDs

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

Important: You receive additional ProSeries CDs (after the initial ProSeries CD that you receive) only if you request and purchase the ProSeries CD Ensemble. The products and product updates on a ProSeries CD are the same products and product updates that are available for download days or weeks before you receive the ProSeries CD.

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

1. Go to the ProSeries Admin workstation and make sure the ProSeries program isn't running.
2. Insert the ProSeries CD into the appropriate drive of the ProSeries 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 the ProSeries program was installed for network use and make sure the ProSeries 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\ProNet08\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 started on the ProSeries 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 program is installed for network use.

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

- Use the Search Help feature on the Help toolbar and in the Help Center, or
- Click the **Help** button on the toolbar, select **User's Guide** in the Help Center, then go to chapter 2, "Updating ProSeries Tax Products."

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