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## 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 your 2004 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.

If you have additional questions, including questions about specific types of networks, go to [www.proseries.com](http://www.proseries.com), choose “Help & Support,” then choose “Browse Support Articles.”

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## Computer system requirements

Page 3 of the ProSeries Quick Reference Guide lists the computer system requirements for ProSeries 2004. The following table lists additional system requirements for network operation. For more information about how system requirements can affect ProSeries operation, go to [www.proseries.com](http://www.proseries.com).

Component	Recommendation	Minimum Requirement
<b>Additional system requirements for network operation</b>		
Server	Pentium 4, 1.3 GHz CPU or higher as a dedicated File/Application server A higher speed CPU normally results in improved performance.	Pentium 3, 650 MHz (or equivalent AMD processor) as a dedicated File/Application server or host on a peer-to-peer network
Total server memory	256 MB RAM plus 128 MB RAM per workstation on the server*	128 MB RAM plus 128 MB RAM per workstation on the server*
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.	650 MB More space may be required if you install many products or prepare a large number of returns.
Server operating system	One of the following: <ul style="list-style-type: none"><li>• Windows 2000 Server</li><li>• Windows 2000 Advanced Server</li><li>• Windows XP (Professional edition)</li><li>• Windows 2003 Server</li></ul>	One of the following: <ul style="list-style-type: none"><li>• Windows XP (Home edition)</li><li>• Windows NT (version 4.0, service pack 6a or later)</li><li>• Windows 98 (second edition)</li><li>• Novell Netware (version 5.1 or later)</li></ul>
Workstation hard disk space	2 GB	650 MB
Workstation memory	512 MB RAM or more	128 MB RAM

Component	Recommendation	Minimum Requirement
Workstation operating system (on each workstation)	One of the following: <ul style="list-style-type: none"> <li>Windows XP (Professional or Home edition)</li> <li>Windows 2000 (service pack 3 or later)</li> </ul>	One of the following: <ul style="list-style-type: none"> <li>Windows NT (version 4.0, service pack 6a or later)</li> <li>Windows 98 (second edition)</li> </ul>
Network infrastructure	100 MB optimized connection environment (Network Interface Cards, Cat V cabling, and Hubs)	10 MB optimized connection environment (Network Interface Cards, Cat V cabling, and Hubs)

**\* Memory requirements.** Microsoft memory requirements for Windows Server 2000 and Windows Server 2003 are a minimum of 128 MB RAM minimum, although 256 MB RAM is recommended. These memory requirements are just for the server operating system. For each workstation, add a minimum of 64 MB RAM per workstation to these figures. Adding 128 MB RAM per workstation is recommended to improve performance.

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## Decide how you are going to install and use ProSeries

**Important:** In order to install ProSeries software for network use, you must purchase the ProSeries/Network Version product.

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

**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 table below.

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 (from the ProSeries CD) for stand-alone use on that computer's hard drive.
Preparers share clients and regularly review returns for other preparers	<ol style="list-style-type: none"> <li>Go to the computer that you choose to be the ProSeries Admin workstation, then install ProSeries software (from the ProSeries CD) for network use. You'll (a) install ProSeries network components to a shared drive and (b) install and set up the ProSeries program on that computer's hard drive.</li> <li>Go to each computer that will serve as a workstation that (a) runs ProSeries and (b) accesses the ProSeries network components from the shared drive, then install and set up the ProSeries program (from the shared drive, using Windows Explorer) on that computer's hard drive.</li> </ol>

To use ProSeries software this way...	Install the program this way...
<p>Preparers work in the office sharing and reviewing returns.</p> <p>Some preparers use laptop or notebook computers to begin and prepare returns at client sites.</p>	<ol style="list-style-type: none"> <li>1. Go to the computer that you choose to be the ProSeries Admin workstation, then install ProSeries software (from the ProSeries CD) for network use. You'll (a) install ProSeries network components to a shared drive and (b) install and set up the ProSeries program on that computer's hard drive.</li> <li>2. Go to each computer that will serve as a workstation that (a) runs ProSeries and (b) accesses the ProSeries network components from the shared drive, then install and set up the ProSeries program (from the shared drive, using Windows Explorer) on that computer's hard drive.</li> <li>3. Go to each laptop or notebook computer, then install and set up ProSeries software (from the ProSeries CD) for stand-alone use on that computer's hard drive.</li> </ol> <p><b>Note:</b> If you install ProSeries software for stand-alone use on a laptop or notebook computer, be sure to use the <b>Copy/Backup</b> and <b>Restore</b> commands on the <b>Client File Maintenance</b> menu (which is accessed from the <b>File</b> menu) when "moving" client files from the network to the laptop or notebook, or from the laptop or notebook to the network.</p>

**ProSeries Admin workstation.** Any computer (including the network administrator's workstation) can be the ProSeries Admin workstation. However, because all product downloads and updates from the Internet must be done at the ProSeries Admin workstation, the computer that you select should have an Internet connection. For more information about deciding which computer will be the ProSeries Admin workstation, see "Choosing the ProSeries Admin workstation" on page 4.

## 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 (compared to stand-alone use):

This feature...	Offers this advantage with network use...
Internet connection	Only the workstation from which you install ProSeries software (the ProSeries Admin workstation) needs an Internet connection. However, because all product downloads and updates from the Internet must be done at the ProSeries Admin workstation, that computer should have an Internet connection.
Client files	The ProSeries program prevents more than one user from working on an open client file, 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	Each user can set up most ProSeries options and features the way that he or she wants on his or her workstation. Some ProSeries options and features (such as firm/preparer information, global billing options, and standard letters and invoices) are the same for all workstations. If a user changes one of these "global" options or features, the change affects all workstations.

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## Prepare your networked computer system

Before you can install ProSeries software, you must prepare your networked computer system. The specific steps that are 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
Mapped drive	Any drive or shared resource that has a drive letter assigned to it.
Shared drive or folder	The drive or 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, client files, and HomeBase database files reside within the shared drive.
Primary file location	This is the location where all current-year client files are stored.
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.
ProSeries Admin workstation	The computer from which ProSeries software is installed to the 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 must remain the ProSeries Admin workstation throughout the tax season.

**Important:** For more information about shared folders, drive mapping, and access rights, refer to your network vendor's documentation.

## Choosing the ProSeries 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.** Because all product downloads and updates from the Internet must be done at the ProSeries Admin workstation, the computer that you select should have an Internet connection.
- **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.** We recommend that you don't use the server (in a client-server network) as a full-use ProSeries workstation. Doing so can degrade network performance.

## Create a shared folder

We recommend that you create a shared folder on the shared drive where you will be installing ProSeries 2004 network components. To do that:

- 1 Create a folder on the drive where you will be installing ProSeries 2004 network components.
- 2 Name the shared folder. For example, name it “Netshare” or another name that you prefer.
- 3 Make the folder a shared folder.
- 4 Install ProSeries 2004 software from the ProSeries Admin workstation to the shared folder.

**Tip:** The shared folder doesn’t have to be mapped to a network letter as long as all workstations can access the shared folder.

Note the following information about shared folders:

- **Peer-to-Peer network.** If you are running a Peer-to-Peer environment, you can install ProSeries 2004 software to the root of C:\ and share the whole C:\ drive. (Note that if you do this, you give everyone on your network access to all files and folders on your C: drive.)
- **File caching.** If you’re using a shared NTFS drive, take the following steps to turn off file caching for the shared folder:
  - Go to Windows Explorer, right mouse click on the shared folder that you created for the ProSeries software, then choose **Sharing**.
  - 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**.

## Mapped drives

Note the following about mapped drives:

- 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 always have.

**Tip:** When you install ProSeries software this year, network components are installed on the shared folder, and the ProSeries program is installed on each workstation.
- If all of your workstations are mapped to a network shared folder using different drive letters, you don’t have to re-map all of your workstations.
- If you’re an existing ProSeries network user and you’ve added new computers to your network, we recommend setting up these computers the same as the existing workstations on your network.
- If you are a new user installing ProSeries software for the first time, you can install ProSeries 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.

**Important:** If you have additional questions, including questions about specific types of networks, go to [www.proseries.com](http://www.proseries.com), choose “Help & Support,” then choose “Browse Support Articles.”

## Workstation access rights

You will be installing ProSeries files to a PRONET04 directory on a shared drive. There will also be a PROPDF directory (for the PDF version of any client files that you choose to create) on that shared drive.

- **Access.** Each workstation must be able to access the shared drive or shared folder where you will be installing ProSeries software.
- **Windows NT-based servers.** If you're using Windows NT, 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 access rights and your network, refer to your network vendor's documentation.

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## Installing ProSeries software for network use from the ProSeries Admin workstation

**Important:** You install and set up the ProSeries program from the ProSeries Admin workstation first, then you install the ProSeries program on each workstation as explained in "Installing ProSeries software for network use on each workstation" on page 13.

When you install ProSeries software so multiple workstations can use the program in a networked environment, you install the software from the first ProSeries CD that you receive. Each ProSeries CD contains the latest version of each ProSeries tax product that is currently available.

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

**Important:** We strongly recommend that you install Client Organizer from the Head Start CD so you can receive other products via the Internet as soon as possible. For more information, see "Keeping your ProSeries products up-to-date" on page 15.

Before you install ProSeries software for the 2004 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 the following information that you will need:
  - Your Customer Number and ZIP code
  - The install code for ProSeries/Network Version
  - The install code for ProSeries/Practice Manager, if you purchased that program
  - The install code for ProSeries/Fixed Asset Manager, if you purchased that program

**Tip:** The only product licensing information that's printed on the packing slip is your Customer Number and ZIP code.

**Important:** Your network install code is also available in the **Order Status and Downloads** section of My ProSeries.com.

To install ProSeries software for network use from the ProSeries Admin workstation, take the following steps:

- 1 Go to the ProSeries Admin workstation.
- 2 Close all open applications and turn off any virus-protection utilities.
- 3 Insert the ProSeries CD into the appropriate drive.  
Don't remove the CD from the drive until you finish installing products.
- 4 In the **ProSeries Installation** dialog box, click **Tax Preparation**.  
If the **ProSeries Installation** dialog box doesn't appear automatically:
  - a. Go to the Windows taskbar, click **Start**, then choose **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 **Tax Preparation**, 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 2004 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 situation(s) identified in the **System Warning** dialog box. After the computer meets the minimum system requirements for the ProSeries 2004 software, go back to page 7 and start the installation procedure again.
  - Check the box indicating you understand you may not receive technical support for issues that you may encounter while using the ProSeries program, then click **Next** to continue to Step 7.

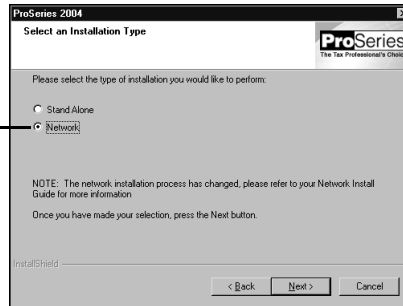
**Important:** We strongly recommend that you click **Cancel** and correct the situation(s) identified in the **System Warning** dialog box.

**Tip:** Go to [www.proseries.com](http://www.proseries.com) for more information about how system requirements can affect ProSeries operation.
- 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 for any reason you find the terms of the ProSeries License Agreement unacceptable, *do not install the software*. Contact Intuit for a refund instead.

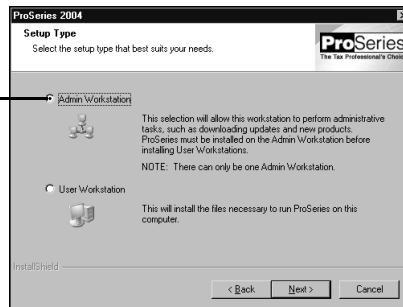
- 8 In the **Select an Installation Type** dialog box, select **Network**, then click **Next**.

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



- 9 In the **Setup Type** dialog box, select **Admin Workstation**, then click **Next**.

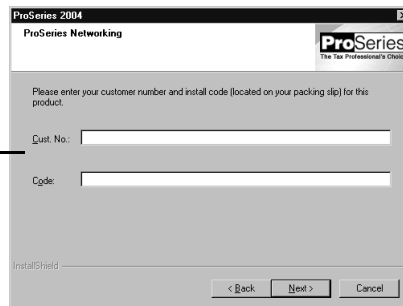
Select **Admin Workstation** to install the ProSeries program on this computer, and to install and set up ProSeries network components on a shared folder.



- 10 In the **ProSeries Networking** dialog box, enter the Customer Number and Network Version install code printed on your packing slip, then click **Next**.

You can find this information on the packing slip that accompanied your ProSeries CD.

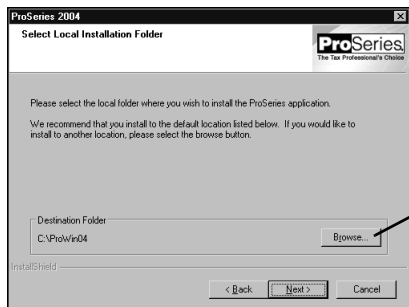
Your network install code is also available in the Order Status and Downloads section of My ProSeries.com.



- 11 In the **Enter a Name for your Workstation** 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**.

- 12 In the **Select Local Installation Folder** dialog box, do one of the following:
- Click **Next** if you want to install the ProSeries program (for the ProSeries Admin workstation) in a \PROWIN04 directory on the local drive that's shown in the dialog box. (That drive will be C: or the drive on which last year's ProSeries was installed.) Proceed to Step 14.

- Click **Browse** if you want to install the ProSeries program (for the ProSeries Admin workstation) on a local drive other than the drive that's shown in the dialog box. Continue with Step 13.

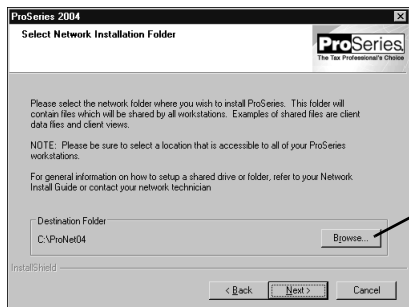


Click here if you want to install the ProSeries program (for the ProSeries Admin workstation) on a local drive other than the drive that's shown.

See Step 13 for additional instructions.

- 13** In the **Select Folder** dialog box, take the following steps:
- Select the drive where you want to install the ProSeries program (for the ProSeries Admin workstation).
  - After selecting the drive, type the folder name **\PROWIN04** in the **Folder name** field so that it appears after the drive you selected, then click **OK**.
  - PROWIN04 directory.** For best results, use PROWIN04 as the name of your 2004 ProSeries directory. Don't install ProSeries software to the root of a drive.
  - If you are prompted to create the PROWIN04 directory on the drive that you've selected, click **Yes**.
  - When you return to the **Select Local Installation Folder** dialog box, click **Next**. Continue with Step 14.

- 14** In the **Select Network Installation Folder** dialog box, click **Browse**.



Click here to identify the location where you want to install the ProSeries network components.

See Step 15 for additional instructions.

Clicking **Browse** opens the **Select Folder** dialog box that you will use to identify the location to which you want to install ProSeries network components. Continue with Step 15.

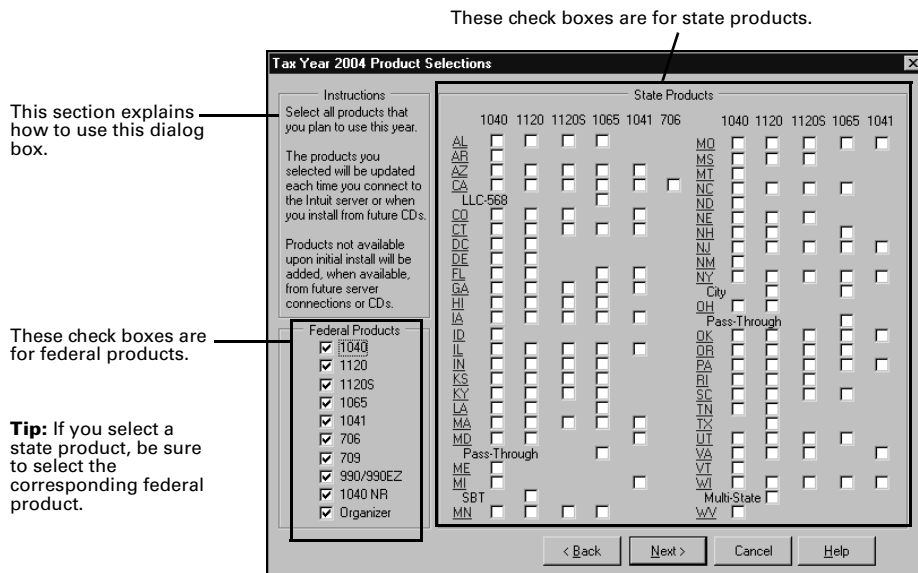
**Important:** If you install ProSeries 2004 software to the root of any drive and share the whole drive in a Peer-to-Peer network environment, you are giving everyone on your network access to all files and folders on that drive.

- 15** In the **Select Folder** dialog box, take the following steps:
- Select the drive where you want to install ProSeries network components.
  - After selecting the drive, type the name **\PRONET04** in the **Folder name** field so that it appears after the drive you selected, then click **OK**.

**ProNet04 directory.** For best results, use PRONET04 as the name of your 2004 ProSeries directory. Don't install ProSeries network components to the root of a drive.

- c. If you are prompted to create the PRONET04 directory on the drive that you've selected, click **Yes**.
- d. When you return to the **Select Network Installation Folder** dialog box, click **Next**. Continue with Step 16.

**16** In the **Tax Year 2004 Product Selections** dialog box, select all the products that you expect to use for the 2004 tax year, then click **Next**. (If you used ProSeries software for the 2003 tax year, the products that were installed last year may already be selected.)



**Tip:** Every ProSeries tax product for 2004 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 15". Any products you select here that you haven't purchased as unlimited will be installed for pay-per-return use.

- 17** If any of the products you selected aren't on the 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**.
- 18** 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**.

**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 products.

- 19** Review the **E-mail Alert Selection on Multiple Computers** dialog box, then click **OK**.
- 20** In the **Disk Space Confirmation** dialog box, review the Required Space and Available Space information, then click **Next**.

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

- 21 Additional components.** Wait while additional components, such as any necessary fonts, Internet Client software, the ProSeries User's Guide, WexTech® AnswerWorks® software, and ProSeries Product Licensing components are installed. Dialog boxes and progress bars keep you informed.

**Tip:** The User's Guide is installed automatically. WexTech AnswerWorks is the search engine that powers the Search Help Content feature.

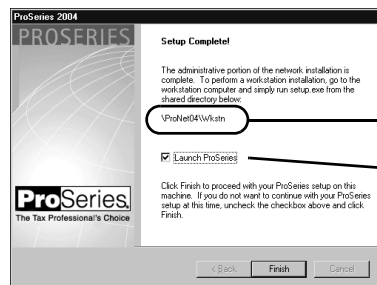
- 22 Internet Explorer.** If Microsoft Internet Explorer 5.5, service pack 2 or later isn't installed on your computer, the installation program installs Internet Explorer 6.0 before continuing. ProSeries software requires portions of Internet Explorer 5.5, service pack 2 or later to run properly.

- 23 Restart Windows message.** Restart the computer if you are prompted to do so.

If the installation program doesn't resume after you restart the computer, start the ProSeries program by double-clicking the **ProSeries 2004** shortcut icon on the Windows desktop. The Connected Customer Wizard will begin automatically. Go to "Setting up the ProSeries program from the ProSeries Admin workstation" on page 12.



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



This is the directory from which you install the ProSeries program on each workstation.

We strongly recommend that you leave the **Launch ProSeries** box checked.

- 25 If the Launch ProSeries option was selected:** The Connected Customer Wizard begins for the ProSeries Admin workstation. The Options Setup Wizard begins for other workstations. Proceed to "Setting up the ProSeries program from the ProSeries Admin workstation" on page 12 now.

**If the Launch ProSeries option wasn't selected:** You return to the **ProSeries Installation** dialog box that's discussed in Step 4 on page 7. Click **Exit** to return to the Windows desktop. Continue with Step 26.

- 26** After you return to the Windows desktop, start the ProSeries program by double-clicking the **ProSeries 2004** shortcut icon. The Connected Customer Wizard will begin.



- 27** Continue with "Setting up the ProSeries program from the ProSeries Admin workstation" on page 12.

## Troubleshooting suggestions

If you have difficulty installing or starting the ProSeries software, 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"><li>1. Go to the <b>Start</b> menu, point to <b>Programs</b>, then <b>Accessories</b>, then <b>System Tools</b>, and then click <b>Disk Cleanup</b>.</li><li>2. Try to install the ProSeries software again.</li><li>3. If there still isn't enough disk space, remove unused programs or data from the hard drive.</li></ol>
A dialog box informs you there was an error	<ol style="list-style-type: none"><li>1. Write down the error message, then restart the computer.</li><li>2. Go to the <b>Start</b> menu, point to <b>Programs</b>, then <b>Accessories</b>, then <b>System Tools</b>, and then click <b>ScanDisk</b>.</li><li>3. After ScanDisk is complete, go to the <b>Start</b> menu, point to <b>Programs</b>, then <b>Accessories</b>, then <b>System Tools</b>, and then click <b>Disk Defragmenter</b>.</li><li>4. After Disk Defragmenter is finished, run your virus-protection software.</li><li>5. Clean the ProSeries CD with a soft cloth, then try to install the ProSeries software again.</li></ol>
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 ProSeries CD.
The ProSeries program doesn't start when it should	<ol style="list-style-type: none"><li>1. Restart the computer.</li><li>2. Make sure no other applications are running.</li><li>3. Double-click the <b>ProSeries 2004</b> icon on the desktop.</li></ol>
You still are unable to install or start the ProSeries program	Start your Internet browser, then go to <a href="http://www.proseries.com">www.proseries.com</a> to search for additional troubleshooting solutions.
You are unable to resolve the problem	Call ProSeries Technical Support. To save time, gather as much information as possible, and have your network administrator available.

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## Setting up the ProSeries program from the ProSeries 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 ProSeries from the ProSeries Admin workstation.

The first time that you start the ProSeries program, the Connected Customer Wizard helps you set up the program if you have a valid Internet connection.

Next, you see either the **Prior Year Settings Transferred** dialog box or the **Welcome to the Options Setup Wizard** dialog box, depending on whether the program was able to transfer the preferences and settings that you used with last year's ProSeries program. These features help you set ProSeries options.

Next, you are asked if you want to transfer last year's client files. The transfer procedure is a simple way to start your clients' ProSeries 2004 client files using the relevant data in their ProSeries 2003 client files.

**Tip:** Current-year client files are stored in the Primary File Location, and the default setting for the Primary File Location is the \04DATA directory within the \PRONET04 directory.

**Important:** See the relevant pages of the ProSeries Quick Reference Guide for information about each of these ProSeries features.

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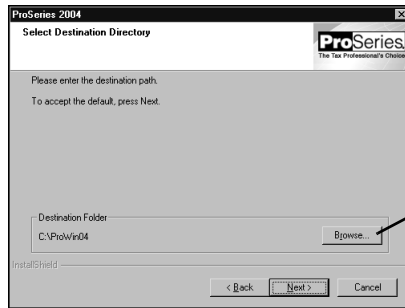
## Installing ProSeries software for network use on each workstation

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.

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

- 1 Log on to the workstation, then start Windows Explorer.
- 2 In Windows Explorer, find the shared drive where the ProSeries network components are installed.
- 3 Find the ProSeries directory on the shared drive.  
**Tip:** The ProSeries directory is \PRONET04 if the recommended name was entered during the installation of ProSeries software from the ProSeries Admin workstation.  
The **Setup Complete** dialog box that appears when you install ProSeries software from the ProSeries Admin workstation identifies the name of the ProSeries directory.
- 4 In the ProSeries directory, find the \WKSTN directory.
- 5 Double-click the SETUP.EXE file in the \WKSTN directory.
- 6 Follow the instructions on the screen.  
**Tip:** There are fewer dialog boxes for a workstation than there are for the ProSeries Admin workstation.
- 7 When prompted, enter a name for the workstation to identify it to users at other workstations.
- 8 When the **Select Destination Directory** dialog box appears, do one of the following:
  - Click **Next** if you want to install the ProSeries program (for the current workstation) in a \PROWIN04 directory on the drive that's shown in the dialog box. (That drive will be C: or the drive on which last year's ProSeries program was installed.)
  - Click **Browse** if you want to install the ProSeries program (for the current workstation) on a local drive other than the drive that's shown in the dialog box.

**Important:** Don't select the location where ProSeries network components are installed.



Click here if you want to install the ProSeries program (for the current workstation) on a local drive other than the drive that's shown.

**Important:** Repeat Step 1 through Step 8 for each computer that will be used as a ProSeries workstation.

## Troubleshooting suggestions

If this situation occurs...	Do this...
You are unable to find the \WKSTN directory, and the drive where the ProSeries software is installed is mapped	<ol style="list-style-type: none"> <li>1. Double-click <b>My Computer</b> on the desktop.</li> <li>2. If the mapped drive has a red X, contact your network administrator for help verifying the network connection.</li> <li>3. Double-click the mapped drive in the <b>My Computer</b> dialog box.</li> <li>4. Double-click the \PRONET04 directory, then locate the \WKSTN directory.</li> </ol>
You are unable to find the \WKSTN directory, and the drive where the ProSeries software is installed isn't mapped	<ol style="list-style-type: none"> <li>1. Double-click <b>Network Neighborhood</b> or <b>My Network Places</b> on the desktop.</li> <li>2. If the server does not show up in a window, contact your network administrator for help verifying the network connection.</li> <li>3. Double-click the server icon.</li> <li>4. Double-click the shared folder where you installed the ProSeries software.</li> <li>5. Double-click the \PRONET04 directory, then locate the \WKSTN directory.</li> </ol>
The installation program didn't start when you double-clicked the SETUP.EXE file	<ol style="list-style-type: none"> <li>1. If the workstation is running any Windows operating system, press <b>Ctrl-Alt-Del</b>.</li> <li>2. Look for SETUP in the <b>Close Program</b> dialog box. If SETUP is listed more than once, highlight one SETUP and select <b>End Task</b>.</li> <li>3. Repeat these steps until only one SETUP is listed in the <b>Close Program</b> dialog box.</li> </ol>
You see an error message or can't resolve a problem	See the troubleshooting suggestions on page 12.

## Installing ProSeries software on a workstation from a ProSeries CD

It's recommended that you install the ProSeries program on each workstation as explained in "Installing ProSeries software for network use on each workstation" on page 13. However, if you are unable to install the ProSeries program on a workstation from Windows Explorer using the SETUP.EXE file, you can install the program from the ProSeries CD.

- 1 Go to the workstation, close all open applications, and turn off any virus-protection utilities.
- 2 Insert the ProSeries CD into the appropriate drive.  
Don't remove the CD from the drive until you finish installing products.
- 3 Follow the instructions on the screen. The installation procedure will be similar to the installation procedure for the ProSeries Admin workstation (see page 7), but note the following exceptions:
  - In the **Setup Type** dialog box, select **Workstation**. (Don't select **Admin Workstation**).
  - In the **Select Network Installation Folder** dialog box, click **Browse**, then locate the shared folder on your network to which ProSeries network components were installed from the ProSeries Admin workstation.

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## Keeping your ProSeries products up-to-date

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

### 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, choose **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 on the shared drive, that new product or product update becomes available to all the workstations on which the ProSeries program is installed for network use.

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

- Use the Search Help feature on the Help toolbar, or
- Click the **User's Guide** button on the toolbar, then go to chapter 5, "Task Scheduler."



## ProSeries Help menu

You can initiate the product-update and product-installation procedures from the ProSeries Help menu.

- 1 Go to the ProSeries Admin workstation and start the ProSeries program.
- 2 Go to the **Help** menu and choose **Update Installed Products/Download New Products**.
- 3 If you want to select additional products for installation, click the **Choose Products to Install** button, then select those products.

**Important:** When the **Update Installed Products/Download New Products** procedure installs a new ProSeries tax product or updates an existing ProSeries tax product on the shared drive, that new product or product update becomes available to all the workstations on which the ProSeries program is installed for network use.

To see more information about the **Update Installed Products/Download New Products** command:

- Use the Search Help feature on the Help toolbar, or
- Click the **User's Guide** button on the toolbar, 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.

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

**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 workstation on which the ProSeries program was previously 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, or
- Click the **User's Guide** button on the toolbar, then go to chapter 2, "Updating ProSeries Tax Products."

