# Corporate Tax Analyzer™
# Installation Instructions

## About the CTA Program

The Corporate Tax Analyzer (CTA) runs on Windows XP and all subsequent versions of Windows. It does not have a distributed structure and does not require an internet connection.

You must purchase a license for each computer that will run the program. If Remote Desktop or a similar technique is used to enable multiple computers to access a copy of CTA installed locally on a single computer, you must purchase a license for each computer that will access CTA.

## Data Files

Each CTA analysis is saved in a single file with the ".CT" extension. Files must be explicitly saved, and are saved with the name and in the folder chosen by the user.

A data file in a shared folder can be used concurrently by more than one person; however, only the person who opens the file first is able to save it. Others who subsequently open that file will be notified that the file is "in use"; if they make changes that they wish to save, they have to save the file with a different name or in a different folder. Thus if two people have the same file open at the same time and both make changes, their changes will end up in two different files.

A single instance of CTA can have only one file open at a time. However, multiple instances of CTA can run concurrently on the same computer, so a user can have multiple data files open at once, each in its own instance of CTA.

## Local vs. Network Installation

The program can be installed in two different ways. When installed locally, each computer has its own copy of CTA installed on a local drive. When installed in a networked configuration, one copy of CTA resides in a shared network folder and is run by multiple computers. Instructions for both types of installation follow this section.

Local installation is recommended.

Local installation is recommended because it is easier to install and maintain than the network configuration. An existing network installation can be converted to local by first uninstalling the "Corporate Tax Analyzer" or "Corporate Tax Workstation" from each computer before following the instructions for local installation.

Data files in a shared folder can be opened concurrently by multiple users no matter which way CTA is installed. There are, however, a few advantages to the network installation:

• When CTA is installed locally, you must ensure that it is installed on no more than the number of computers allowed by your license. When installed in a network configuration, CTA itself prevents the number of computers that run it from exceeding the allowed number.

• When a new version of CTA does not change the required system files, all network users can be updated to the new version by running program setup on one computer. If the system files do change, this advantage is lost because the workstation setup must then be run on each computer. A new major version of CTA is typically released once a year, but the system files required by CTA change at irregular intervals every few years.

**Local Installation Instructions (Each computer has its own program)**

These instructions install the Corporate Tax Analyzer program in a folder accessible to one computer. You may install the program on the number of computers allowed by your license.

1. Place the program CD in the drive. Start the Setup program by clicking the **SetupCTA.msi** file on the CD.

2. If the program will be installed on more than one computer, you may want to copy the SetupCTA.msi file from the CD to a shared folder and have each computer run Setup from the shared folder. This may be easier than bringing the CD to each computer.

3. Setup asks you to select the folder in which to install the program. If a previous version is installed, Setup suggests that you install in the same folder, overwriting the previous version. However, you may install the program in any folder. If you enter the name of a folder that doesn't exist, Setup creates it.

4. If the program is being installed on a computer for the first time, Setup asks you to choose (or create) the default folder for storing data files. You may want to save files to a shared network folder if more than one person will work on them, or to ensure that they are regularly backed up. (**Note:** The program allows each computer to change its default data folder and also to save files to any folder, not just the default.)

5. When installation is complete, store the CD in a safe place. You do not need the CD to run the program.

**Network Installation Instructions (Multiple computers use the same program)**

In the networked configuration, multiple computers access the same copy of CTA, which is installed in a shared folder. The system files required by CTA must also be installed in each computer's local Windows folder.

A network installation uses two different setups:

• **Program Setup** on the CD installs the program in the folder of your choice and the required system files in the computer's Windows folder.

• **Workstation Setup** installs only the required system files in the computer's Windows folder.

Creating a network installation is a two-step process: In step 1, you run Program Setup on one computer. In step 2, you run Workstation Setup on the other computers that will run the program.

A license is not required for a computer that runs the program exclusively in Admin Mode. The system administrator may want to install the program and run it in Admin Mode in order to manage the network installation. Admin Mode is discussed toward the end of this document.

**Step 1: Run Program Setup on one computer**

Program setup is used to install the program files in a shared folder that is accessible to all computers that will run CTA.

*Updating an existing network installation*

1. Choose a computer to run Program Setup. (This may be the computer of the administrator who will manage the network installation.) Start Program Setup by clicking the file named **SetupCTA.msi** on the CD.

2. The new version should be installed in the same folder as the previous version, overwriting it.

> If the same computer that installed the previous version is being used to install this version, Setup suggests installing the new version in the same folder as the previous version. Accept this suggestion.

> However, if a different computer is being used to install this version, Setup suggests installing to a local folder on the C: drive. Do not accept this suggestion. Browse to the shared folder where the previous version resides. (If you are unsure which folder contains the previous version, you can inspect the Target property of a shortcut to the previous version of the program.)

3. Click through to complete Setup. No further information is required, as Setup will use the settings from the previous version.

*Creating a new network installation*

1. Choose a computer to run Program Setup. (This may be the computer of the administrator who will manage the network installation.) Start Program Setup by clicking the file named **SetupCTA.msi** on the CD.

2. Setup suggests that you install the program on the computer's local C: drive. **Do not accept this suggestion**. You must install the program in a shared folder that is accessible to all computers that will run the program. If you enter the name of a folder that does not exist, Setup creates the folder. (**Note:** If Setup does not allow you to browse to shared network folders, quit Setup, turn off Windows UAC, reboot, then run Setup again. You can turn UAC back on after the program is installed.)

3. Setup asks if you want to install for a network or single user. Select **Network**. On the next screen, enter the password that appears on the license card that was included with the program CD in the initial fulfillment shipment. If you have misplaced the password please contact Technical Support at 800.424.2938.

4. Setup asks you to choose (or create) the default folder for saving data files. That folder will be the default that new users begin with. You may want to save files to a shared network folder if more than one person will work on them, or to ensure that they are regularly backed up. (**Note:** The program allows each computer to change its default data folder and to save files to any folder, not just the default.)

**Step 2: Run Workstation Setup on the remaining computers**

Workstation setup installs the system files required by CTA in a computer's local Windows folder; it also creates shortcuts to the program on the desktop and on the Windows Start menu. Workstation Setup does not need to be run on the computer that was used to install CTA, since Program Setup installs the system files and shortcuts on that computer.

*Updating an existing network installation*

The required system files did not change between the 2013 version and the 2015 version of the program. Therefore, you do not need to run Workstation Setup on computers that ran the 2013 or 2014 versions of CTA. You do need to run Workstation Setup on computers that ran an earlier version of CTA, or on computers that are new to the network installation. Workstation Setup is named **Setup.exe** and is located in a folder named **Net** under the folder in which CTA is installed.

*Creating a new network installation*

You must run Workstation Setup on all computers that will run the program except the computer that was used to run Program Setup. The Workstation Setup file is named **Setup.exe**. It is located in a folder named **Net** under the folder in which CTA is installed.

## Managing the network installation

*Adding a new workstation to the network installation*

Computers that were part of a previous network installation remain part of an updated installation. This section applies when a computer is added to an existing or new network installation.

The first time the program runs on a computer, it asks you to choose a Workstation ID for the computer. The ID must be unique, so you will not be allowed to choose an ID that is already associated with another computer in the network. Once you choose an ID, the computer becomes a workstation in the network installation.

You will not be allowed to add a new computer to the network installation if doing so would exceed the number of workstations allowed by your license. In this case, you must delete one computer from the list of workstations before you can add a new one. CTA must be started in Admin Mode to delete a Workstation ID from the list.

*Admin Mode*

When CTA runs in Admin Mode, the tax calculations are disabled, but other features useful for managing the network installation are enabled. A computer that runs CTA exclusively in Admin Mode does not use up a license or require a Workstation ID.

There are three ways to start the program in Admin Mode:

• Right-click a shortcut to the program, choose **Properties** from the menu, and append a space and then "**/Admin**" to the Target property after the program name **ctwin.exe**. The shortcut will then always start the program in Admin Mode until you remove "**/Admin**" from the Target property.

• When starting the program from a command line, append a space and then "**/Admin**" after the program name **ctwin.exe**.

• If the computer does not have an assigned Workstation ID, you will be asked to enter one when the program starts. Enter "**Admin**" as the Workstation ID.

The **Delete Workstation** command on the **Tools** menu allows you to remove an unused Workstation ID from the list**.** (Deleting a computer's ID from the list of workstations does not remove the system files installed in its Windows folder. Therefore, the computer could be added back into the list of workstations without rerunning Workstation Setup.)

The **Network Password** command on the **Tools** menu allows you to enter a new password to change the number of licenses allowed in the network installation.

Any options set when the program is in Admin Mode become the initial option settings of new workstations subsequently added to the network installation. Options are located in the **Options**, **Screen Font**, and **Printer Font** selections on the **Tools** menu, and in the **Page Setup** selection on the **File** menu.