

**Bloomberg
Tax**

INCOME TAX PLANNERTM
INSTALLATION GUIDE

May 2019

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BEFORE YOU START

IMPORTANT INFORMATION

This guide provides instructions for installing and activating Bloomberg Tax Technology's Income Tax Planner. If you have installed a prior version of Income Tax Planner, it will be uninstalled during setup.

Please close all programs before installing Income Tax Planner.

The following are supported:

- Installation via Remote Desktop
- Installation to a local drive, a mapped network drive, or a UNC path such as \\server\share
- Citrix

SYSTEM REQUIREMENTS

- **Supported OS:**
 - Windows Server 2008 R2 SP1
 - Windows Server 2012 R2
 - Windows Server 2016
 - Windows 7 SP1, 32/64-bit
 - Windows 8, 32/64-bit
 - Windows 8.1, 32/64-bit
 - Windows 10, 32/64-bit
- **RAM:** 2 GB
- **Available disk space:**
 - Standalone: 50 MB
 - Network: Server 45 MB, Workstations 15 MB

DOWNLOADING THE SETUP FILE

Tip. Before you begin this process, add the following email address to your safe senders list so that you will be able to receive the download link email later in this process:
`product_delivery@bnasoftware.com`

1. Using your Internet browser, go to:
advantage.bloombergtaxtech.com/ElectronicFulfillment
Supported browsers for download are Internet Explorer 11, or the latest version of Chrome, Firefox, or Microsoft Edge.
2. Enter your Customer ID and Access Code, then click **Next**. This information was sent to the primary contact on the account.
3. Enter your contact information and click **Next**. An email message containing a link to the software download page will be sent to you.
4. Check your email for a the message from **product_delivery@bnasoftware.com**.

Open the email message and click the link to access the download page.
5. On the software download page, click **Download** and save the **ITPSetup.msi** file to a convenient location.

Once the download is complete you can install the software using either the Single-User Installation Instructions or Network Installation Instructions, below.

SINGLE-USER INSTALLATION

To install and run the program after installation, you must have full administrative rights to the installation folders specified in step 6, below.

Note. You must have already downloaded the program installation file from the Electronic Fulfillment Center.

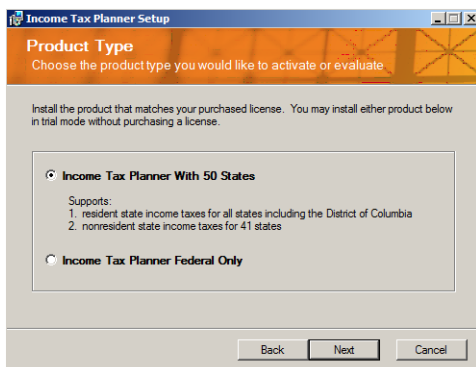
INSTALLING THE PROGRAM

1. Double-click to open the **SetupITP.msi** file that was downloaded from the Electronic Fulfillment Center.
2. On the splash screen and **Welcome** panel, click **Next**.
3. The **License Agreement** opens in a scrolling window. Read through the agreement, click the check box to accept the terms, then click **Next**.

A license is used for each user account activated on each workstation. To purchase additional licenses, call **Bloomberg Tax Technology Sales** at 800.424.2938.

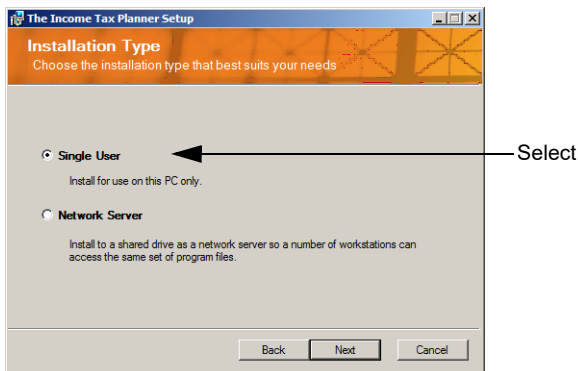
Note. You may review the license agreement any time after installation. On the menu bar click **Help > Contents > BNA Software License Agreement**.

4. On the **Product Type** panel, choose the product that matches your purchased license.

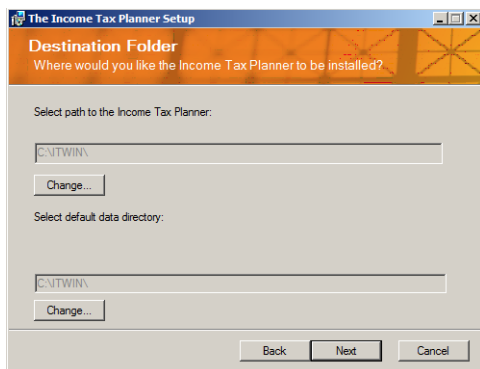


Note. You may install and use either program — with all its features — in trial mode for 30 days without activating a license. See **Using the Program in Trial Mode** on page 22.

5. On the **Installation Type** panel, select **Single User** and click **Next**.



6. On the **Destination Folder** panel, click **Next** to accept the default locations (recommended), or click **Change** to specify a different drive and folder and then click **Next**.



The default location for the program files and data files is C:\ITWIN. You may select a location on a local drive, a mapped network drive, or a UNC path such as \\server\share. However, choosing **C:\Program Files** or **C:\Program Files (x86)** as the location for the program files is not permitted.

Note. To install and run the program after installation, you must have full administrative rights to the specified folders. To install the program to a mapped network share or a UNC path, you must have full domain rights.

7. On the **Ready to Install** panel, note the check box options:

- **Create a desktop shortcut to BNA Income Tax Planner.**
- **Create a desktop shortcut to Default Data Directory.**
- **Run the application after installation.**

To accept the default selections and begin the installation, click **Install** (or, click an option to deselect it, then click **Install**).

8. The **Installing** panel opens, showing the progress of the installation. When the **Completed** panels opens, click **Finish**. Continue to **Activating The Program** on page 18.

NETWORK INSTALLATION

SETTING UP THE SERVER

<<Network Administrators only>>

To install and run the program after installation, you must have full administrative rights to the installation folder on the server (the default location is C:\ITWIN) and to the following folder on the server:

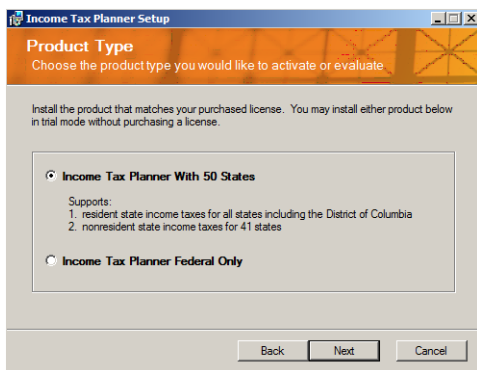
[drive letter]:\Users\[user name]\AppData\Local\Bloomberg
Tax Technology\Income Tax Planner.

The server component is a special “Admin Mode” version of the program that allows you to set options for workstations. Tax calculations are disabled in Admin Mode. Running the program in Admin Mode will not activate a license.

1. On your network file server, double-click to open the **SetupITP.msi** file that was downloaded from the Electronic Fulfillment Center.
2. On the splash screen and **Welcome** panel, click **Next**.
3. The **License Agreement** opens in a scrolling window. Read through the agreement, click the check box to accept the terms, then click **Next**. You must accept the terms of the agreement to install the program.

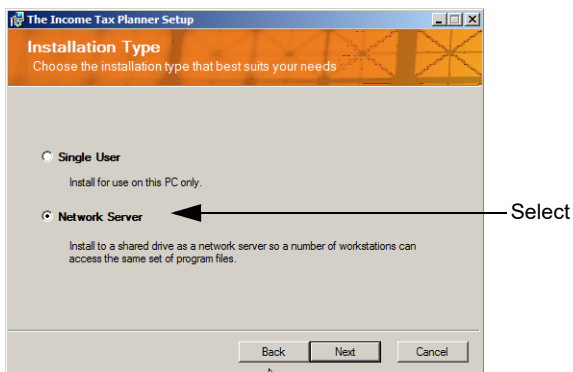
Note. You may review the license agreement any time after installation. On the menu bar click **Help > Contents > BNA Software License Agreement**.

4. On the **Product Type** panel, choose the product that matches your purchased license.

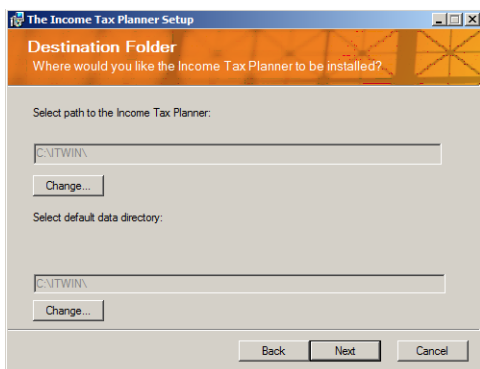


Note. You may install and use either program — with all its features — in trial mode for 30 days without activating a license. See **Using the Program in Trial Mode** on page 22.

5. On the **Installation Type** panel, select **Network Server** and click **Next**.



6. On the **Destination Folder** panel, click **Next** to accept the default locations (recommended), or click **Change** to specify a different drive and folder and then click **Next**.



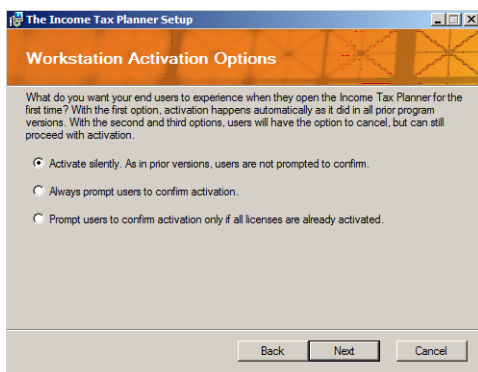
You may select a location on a local drive, a mapped network drive, or a UNC path such as \\server\share. However, choosing **C:\Program Files** or **C:\Program Files (x86)** as the location for the program files is not permitted.

Note. To install the program to a mapped network share or a UNC path, you must have full domain rights.

Whether you accept the default location of C:\ITWIN or specify a different location, the folder you select will be the “share” folder.

Note. To change your default data folder later, open the program in Admin Mode and click **Options > Default Directory**. You will have the opportunity in step 9, below, to create a desktop shortcut to Income Tax Planner Admin Mode.

7. On the **Workstation Activation Options** panel, click the option that indicates what you want your end users to experience when they open Income Tax Planner for the first time, and then click **Next**.



- a. **Activate silently.** Users are not prompted to confirm activation.
- b. **Always prompt users to confirm activation.**
- c. **Prompt users to confirm activation only if all licenses are already activated.**

With options **b** and **c**, users can still proceed with activation but will have the option to cancel.

Note. To change your selection later, open the program in Admin Mode, and click **Options > Network Administrative Options**.

8. The **Administrator Contact Information** panel opens.

The information you provide will be presented to users whenever they are prompted to confirm activation during workstation installation.

If you want your users to know who to contact should they have questions about workstation activation, enter your contact information in the fields provided, then click **Next**.

Note. To change your contact information later, open the program in Admin Mode and click **Options > Network Administrative Options**.

9. On the **Ready to Install** panel, note the check box options:
- **Create a desktop shortcut to BNA Income Tax Planner Admin Mode.**
 - **Create a desktop shortcut to Default Data Directory.**
 - **Run the application in Admin Mode after installation.**

Note. When running the program in Admin Mode, no license is consumed and tax calculations are disabled.

To accept the default selections and begin the installation, click **Install**, or click an option to deselect it, then click **Install**.

Note. After installation, if you want to run the program in Practitioner Mode (tax calculations enabled), thus activating a license for yourself, click **Start > All Programs > Income Tax Planner > Income Tax Planner**, or click **Start > Run**, type ITWIN, and click **OK**.

10. The **Installing** panel opens, showing the progress of the installation. When the **Completed** panels opens, click **Finish**.
11. Proceed to **Activating The Program** on page 18.

SETTING UP WORKSTATIONS

Before installing the program on network workstations, you must install the server component on your network file server. See **Setting Up The Server** on page 10.

Network workstation setup is required. However, for firms currently running a prior program version, you—as a network administrator—may choose to let your end users set up their workstations. Assuming you have installed the server component, then when users open the program at their workstations

they will be prompted to upgrade. After acknowledging the prompt, they must then complete the steps below, beginning at step 3.

To install or run the program on a network workstation, you must have full rights to the installation folder on the server (the default location is C:\ITWIN) and to the following folder on the workstation:

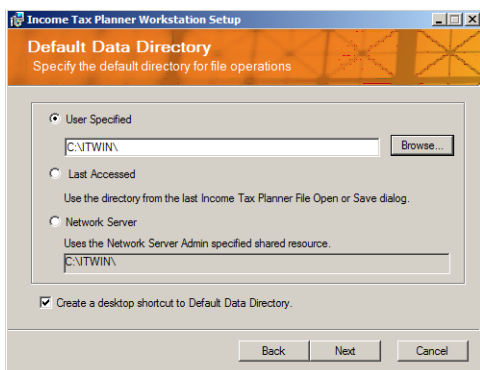
[drive letter]:\Users\[user name]\AppData\Local\Bloomberg Tax Technology\Income Tax Planner.

Note. A license is used for each user account activated on each workstation. To purchase additional licenses, call **Bloomberg Tax Technology Sales** at 800.424.2938.

1. Map a network drive to the share folder you specified in step 6 on page 11.
2. Click **Start > Run**. In the text box, type **F:\ITWIN\NET\Setup.exe** (where **F:\ITWIN** is the network drive and folder where you installed the program). Click **OK**.
3. On the splash screen and **Welcome** panel, click **Next**.
4. The **License Agreement** opens in a scrolling window. Read through the agreement, click the check box to accept the terms, then click **Next**. You must accept the terms of the agreement to install the program.

Note. You can review the license agreement any time after installation. On the menu bar click **Help > Contents > BNA Software License Agreement**.

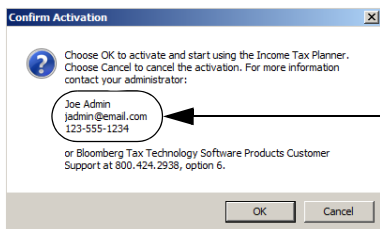
5. If a prior version of the program is detected, the **Products Currently Installed** panel informs you that the Setup program will uninstall the prior version. Click **Next** to continue.
6. The **Default Data Directory** panel opens.



- a. Accept the default data directory, or choose a different default data directory by clicking **Browse**, **Last Accessed**, or **Network Server**.
 - b. A desktop shortcut to your Default Data Directory will be created by default. If you do not want a desktop shortcut created, click to deselect the check box at the bottom of the panel.
 - c. Click **Next**.
7. On the **Ready to Install** panel, note the check box options:
 - **Create a desktop shortcut to BNA Income Tax Planner.**
 - **Run the application after finishing.**

Click **Install** to accept the default selections (or click to deselect one or both of the options, and then click **Install**).
 8. The **Installing** panel shows the progress of the installation. When the **Completed** panels opens, click **Finish**.

If during the network server installation (see step 7 on page 13), the option to “Activate silently” was selected, or the option to “Prompt users to confirm only if all licenses are activated” was selected and a purchased license is available, then the workstation setup is complete, and you are ready to begin using the program. Otherwise, continue to the next step.
 9. The first time you open the program after installation, the **Confirm Activation** panel opens.



If supplied, your network administrator's contact information is shown here

This panel opens because during the network server installation (step 7 on page 13), one of these options was selected:

- Always prompt users to confirm activation
- Prompt users to confirm only if all licenses are activated (and all purchased licenses have been activated)

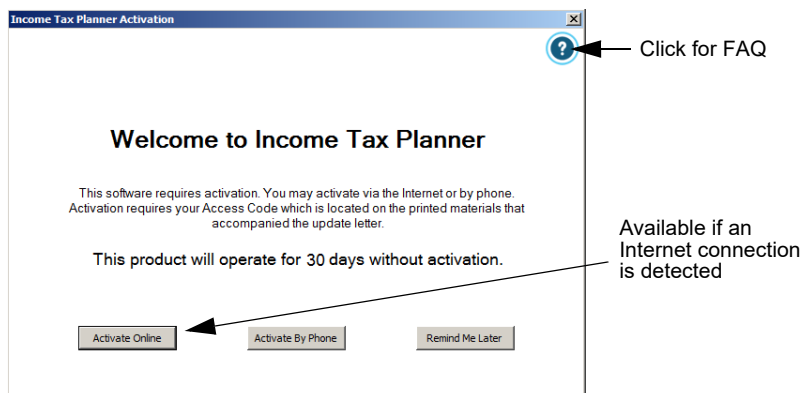
In either case, you can continue to activate a license and begin using the program.

Click **OK** to activate the program. The workstation setup is complete. If you installed the Fifty States program edition, see **Setting Your Default Resident State** on page 24.

ACTIVATING THE PROGRAM

Note. Ensure port 80, the standard HTTP port, is open in your firewall.

The first panel of the **Activation** wizard presents three options.



- **Activate Online** — Click to activate the program online. For further instructions, see **Activating Online** on page 19.
- **Activate by Phone** — Click to Activate the program by phone. For further instructions, see **Activating By Phone** on page 20.
- **Remind Me Later** — Click to use the program in trial mode for 30 days. For further instructions, see **Using the Program in Trial Mode** on page 22.

<<Network Server Installations>> At any time during your trial period, you may activate the program. When your trial period expires, you must activate the program to continue using it. To activate it, browse to the program folder (**ITWIN**), double-click **BLMServerActivationTool.exe**, and follow the prompts. Performing a server activation by running **BLMServerActivationTool.exe** does not consume a seat. If you installed the Fifty States program edition, see **Setting Your Default Resident State** on page 24. Otherwise, the installation of the server component is complete, and you can proceed to **Setting Up Workstations** on page 14.

ACTIVATING ONLINE

1. The **Online Activation** panel opens:

Income Tax Planner Activation

Online Activation

Please enter the 20 character Access Code provided on the printed materials that accompanied the update letter and click Activate.

Can't find your Access Code? Call Bloomberg Tax Technology Software Products Technical Support at 1-800-424-2938, Monday - Friday, 9:00a.m. to 7:00 p.m. EST.

Access Code: A - B - C - D - E

Please enter your e-mail address to receive email notifications about updates to your software.

Email (optional):

Click for FAQ

If a prior program version is detected, the access code will populate automatically for you. Otherwise, enter your access code and, optionally, your e-mail address, and click **Activate**.

Your access code is in the Electronic Fulfillment email you received from Bloomberg Tax Technology. If you cannot find your access code or if you need to purchase additional licenses, call **Bloomberg Tax Technology Customer Support** at 800.424.2938.

2. Click **Finish** on the **Thank You** panel.

Income Tax Planner Activation

Thank You!

Your Income Tax Planner has now been activated.
To continue to the program, click Finish.

To find out more about Bloomberg Tax Technology software products, visit
<http://www.bnasoftware.com>

Click for FAQ

If you installed the Fifty States program edition, see **Setting Your Default Resident State** on page 24. Otherwise, the installation is complete.

<<Network Server Installations>> Proceed to **Setting Up Workstations** on page 14.

ACTIVATING BY PHONE

1. The **Phone Activation** panel opens:

Income Tax Planner Activation

Phone Activation

Step 1: Please enter the 20 character Access Code provided on the printed materials that accompanied the update letter and click Next.

Can't find your Access Code? Call Bloomberg Tax Technology Software Products Technical Support at 1-800-424-2938, Monday - Friday, 9:00a.m. to 7:00 p.m. EST.

Access Code: A B C D E

Back Next Cancel

If a prior program version is detected, the access code will populate automatically for you. Otherwise, enter your access code and click **Activate**.

Your access code is in the Electronic Fulfillment email you received from Bloomberg Tax Technology. If you cannot find your access code or if you need to purchase additional licenses, call **Bloomberg Tax Technology Customer Support** at 800.424.2938.

2. The next panel shows your system information:

Income Tax Planner Activation

Phone Activation

Step 2: Call Bloomberg Tax Technology Software Products Technical Support at 1-800-424-2938, Monday to Friday, 9:00a.m. to 7:00 p.m. EST.

Step 3: Provide the customer support representative with the following when requested:

User Name: John Smith

Computer Name: Desktop PC

Access Code: A B C D E
123A - 123A - 123A - 123A - 123A

Machine ID: A B C D E
ABC1 - ABC1 - ABC1 - ABC1 - ABC1

Back Next Cancel

Follow the instructions on the panel to obtain your activation code, and then click **Next**.

Note. Your activation code is different than your access code.

3. Next, you are prompted for your activation code, which will be provided to you by the Technical Support representative.

Income Tax Planner Activation

Phone Activation

Step 4: Enter the 20 character Activation Code provided by the support representative.

Activation Code: A B C D E

Step 5: Click the Activation button.

Back Activate Cancel

Click for FAQ

Enter your activation code and click **Activate**.

4. Click **Finish** on the **Thank You** panel.

Income Tax Planner Activation

Thank You!

Your Income Tax Planner has now been activated.
To continue to the program, click Finish.

Finish

To find out more about Bloomberg Tax Technology software products, visit
<http://www.bnasoftware.com>

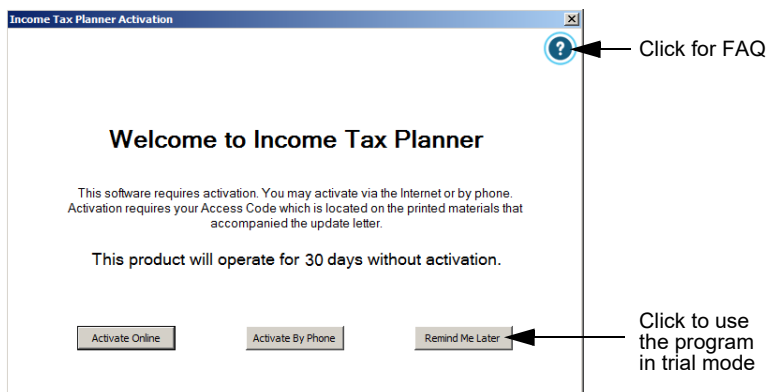
Click for FAQ

If you installed the Fifty States program edition, see **Setting Your Default Resident State** on page 24. Otherwise, the installation is complete.

<<Network Server Installations>> Proceed to **Setting Up Workstations** on page 14.

USING THE PROGRAM IN TRIAL MODE

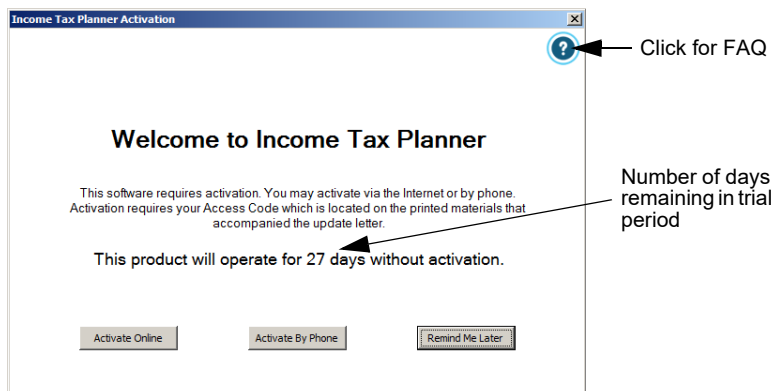
You may use the program — with all its features — in trial mode for 30 days without activating it.



1. Click **Remind Me Later** to begin your 30-day free trial.

<<Network Server Installations>> At any point during or after your trial period, you can activate the program. To activate the program, use the Server Activation tool to launch the Activation wizard again; click Start > Programs > BNA Income Tax Planner > BLM Server Activation Application Tool.

<<Single User Installations>> Upon opening the program, you will be shown the number of days remaining in your trial period:



<<**Single User Installations**>> At any point during your trial period, you can activate the program. See **Activating The Program** on page 18.

2. If you installed the Fifty States program edition, see **Setting Your Default Resident State** on page 24. Otherwise, the installation is complete and you are ready to begin using the program.

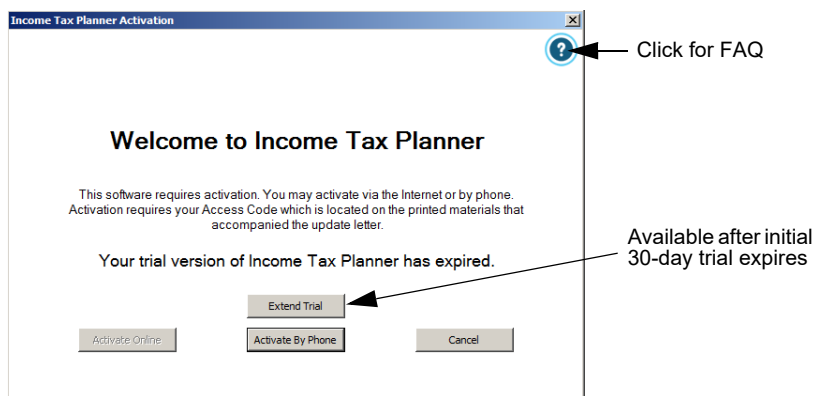
<<**Network Installations**>> Proceed to **Setting Up Workstations** on page 14. You may activate up to 5 client licenses when using the program in trial mode.

EXTENDING YOUR TRIAL PERIOD

<<Single User Installations only>>

At the end of the 30-day trial period, you will have the option to extend your trial period for another 30 days, after which you must activate the program to continue using it. For information on purchasing licenses, call **Bloomberg Tax Technology Sales** at 800.424.2938.

When you start the program after your 30-day trial period has expired, the **Welcome** panel opens and has an additional button that gives you the option to extend your trial period:

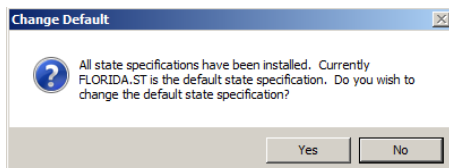


To extend your trial period for another 30 days, click **Extend Trial** and call **Bloomberg Tax Technology Customer Support** at 800.424.2938.

SETTING YOUR DEFAULT RESIDENT STATE

<<Fifty States program edition only>>

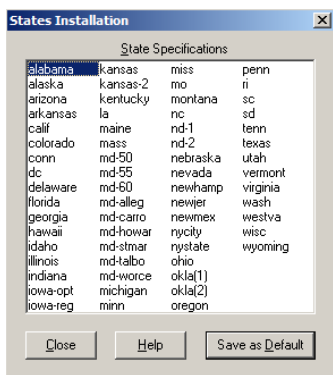
1. Upon opening the program, all state specifications are automatically installed, and you are prompted to select or change the default resident state.



Click **Yes** to specify the default resident state (or click **No** to proceed to the **Main Worksheet**, where you can begin a new analysis).

Note. You can change the default resident state any time; on the menu bar click **Assumptions > Resident State**.

The **States Installation** dialog opens:



2. Click to select a state in the list and click **Save as Default**.
3. A confirmation message opens indicating the selected state. Click **OK** to close the message.
4. A message opens asking if you want to exit States Installation. Click **Yes** to close the message (or, click **No** to select a different default resident state). All federal and state files are now installed.

TROUBLESHOOTING

While trying to install Income Tax Planner on the network server, I get an error message: “License file is missing or damaged. Please contact your network administrator. Error 40.” What should I do?

Follow these steps:

1. Delete any existing it.ini and blm.dat files from the server.
2. Try again to install Income Tax Planner.
3. If the error persists, it is likely due to your anti-virus/anti-malware software. Disable your anti-virus/anti-malware software, then try again to install Income Tax Planner.

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