

SOFTWARE ASSISTANT

Network Installation Guide

Tax Assistant allows for a range of server based installation options including Workstation to Server and Terminal Server installation. The following will give you instructions on both installation types.

Workstation-Server Installation

1. The full installation must be completed on all workstations. You **do not** need to install the program onto the server unless it will be used by a staff member. We recommend you download the current version of Tax Assistant. This should be installed on each workstation using default settings. Install the application for **all users** as a **typical** installation when prompted. You may download the current full installation via the [Update Centre](#).
2. Once Tax Assistant is installed, you will need to register each license in the registration form shown on screen. Enter the username and password sent to the email attached to your account. Tick your modules purchased and click **Register | Deregister**. This should update the status and expiry periods.

Registration form 2014

Registration details

User name Username Password ***** Computer:

Module	Serial number	Activation code	Status
<input checked="" type="checkbox"/> Tax Assistant	TE9181FD32C7B37		Not registered
<input checked="" type="checkbox"/> Ledger Assistant	LDEE71FD32C7B4D		Not registered
<input checked="" type="checkbox"/> ASIC Register	A16101FD32C7B48		Not registered
<input checked="" type="checkbox"/> Practice Assistant	P4D391FD32C7B30		Not registered

Please select the modules that you wish to register on this computer then click on the 'Register | Deregister' button.

Register | De-register

Data directory
C:\ProgramData\Software Assistant\Assistant\Data\

Help Configure BDE Close this form

3. Any workstation that will be lodging to the ATO requires an ATO Machine Credential (M2M) to be installed. For assistance with downloading an M2M, please see the ATO guide below: <https://info.authorisationmanager.gov.au/guide-how-to-install-a-machine-credential>
4. Once Assistant has been installed (on any workstation), navigate to the following location: **C:\ProgramData\Software Assistant** and copy the Assistant folder (containing Data, Letters, Export and Notes folders). This needs to be placed on the server in a location of your choice.

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- Once the Assistant folder is on the server, on each workstation, click on the Windows Start Menu and search for 'Register Assistant'. Click **Advanced** on the Registration Form. The data directory field at the bottom of the registration form must point to the Data folder (located in the Assistant folder copied in step 4). Do this on all workstations (eg. Z:\Assistant\Data **OR** [\\server\Assistant\Data](#)). You may use a mapped drive or UNC path just as long as this is exactly identical on all workstations (excluding drive letter).

Workstation 1: Path: X:\ShareDir\Tables Workstation 2: Path: X:\ShareDir\Tables	OK
Workstation 1: (Also the machine with the tables): Path: C:\ShareDir\Tables Workstation 2: Path: X:\ShareDir\Tables	OK
Workstation 1: (Also the machine with the tables): Path: C:\ShareDir\Tables Workstation 2: Path: X:\ShareDir\Tables Workstation 3: Path: R:\ShareDir\Tables	OK
Workstation 1: Path: X:\ShareDir\Tables Workstation 2: Path: X:\Tables (Where X:\Tables is actually X:\ShareDir\Tables, but mapped on the "ShareDir" directory)	Error You must refer to the data directory with the same path string (except drive letter) on each of the workstation.
Workstation 1: (Also the machine with the tables): Path: C:\ProgramData\Software Assistant\Data Workstation 2: Path: \\WS1\ProgramData\Software Assistant\Data (Where \\WS1 refers to workstation 1)	Error Data path needs to be the same. Workstation 1 should change its data path to be identical to Workstation 2.

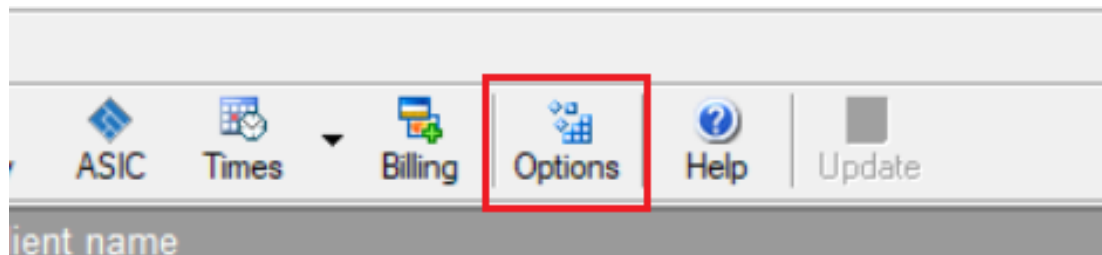
- This should complete the network link between server and workstation. Verify you have an Assistant icon on the desktop and open the program. A simple test would be to create a client and check it is mirrored on all linked workstations.
- This step is optional. You may also share Letters, Notes and Export folders between computers. This will share all letter templates and notes such as invoices, receipts and ledger note templates. To do



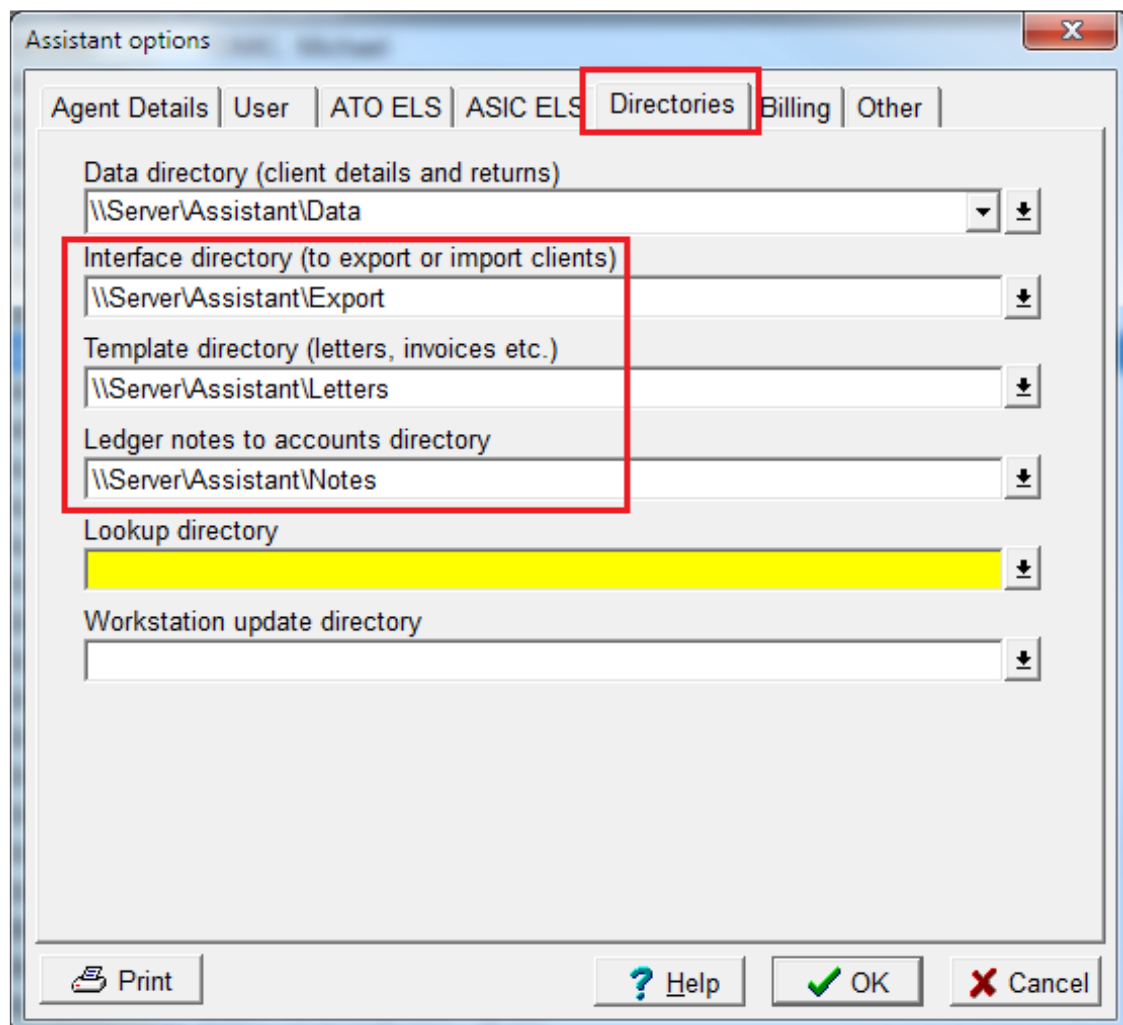
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so, open Assistant Options as follows:



8. Open the Directories tab and change the Interface, Template and Ledger paths to link to your server, eg.



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9. The installation is complete.

Terminal Server Installation

1. The full installation must be completed on the Terminal Server. We recommend you download the current version of Tax Assistant. This should be installed on the Terminal Server using default settings. Install the application for **all users** as a **typical** installation when prompted. You may download the current full installation from the [Update Centre](#).
2. Once Tax Assistant is installed, you will need to register your license in the registration form shown on screen. Enter the username and password sent to the email attached to your account. Tick your modules purchased and click **Register | Deregister**. This should update the status and expiry dates.

Registration form 2014

Registration details

User name: Username Password: ***** Computer:

Module	Serial number	Activation code	Status
<input checked="" type="checkbox"/> Tax Assistant	TE9181FD32C7B37		Not registered
<input checked="" type="checkbox"/> Ledger Assistant	LDEE71FD32C7B4D		Not registered
<input checked="" type="checkbox"/> ASIC Register	A16101FD32C7B48		Not registered
<input checked="" type="checkbox"/> Practice Assistant	P4D391FD32C7B30		Not registered

Please select the modules that you wish to register on this computer then click on the 'Register | Deregister' button.

Register | De-register

Data directory

C:\ProgramData\Software Assistant\Assistant\Data\

Configure BDE

Close this form

Help

3. If you need to copy the Assistant database to the Terminal Server, you must copy your existing Assistant folder (check your data path under the Assistant Options (**Options > Directories > Data directory**) to the Terminal Server. Copy to the following default location on the Terminal Server **C:\ProgramData\Software Assistant**, overwriting all files.