

iTax Install Instructions



Notes:

- Contact BAS for access to the installer via the FTP site.
- This process will require **full administrative rights** to complete the install properly.
- Verify you have a current backup of your tax database.
- If installing the host machine, verify you have a copy of your Data folder located in the iTax directory on the previous host machine.
- The shared data folder and update repository require full control setup in the security tab by right clicking and editing the properties of these folders.

Select the applicable scenario:

- A. Install of iTax on host machine (tax database will be on this workstation)
 - Refer to page 2 for step by step instructions.
- B. Install of iTax on non-host machine (tax database will be on another workstation or on a server)
 - Refer to page 3 for step by step instructions.

A. Follow the below instructions if the tax database will be hosted locally on this workstation:

1. Copy the installer from the FTP site to the local workstation.
2. Once the installer is local, run the installer and then click the Next button.
3. The Choose Components Screen will now be displayed. Under the type of install, select *Server Mode*.
 - A. For existing users, uncheck the *FoxLock Data (New Install)* component.
4. Click the Next button.
5. The Choose Install Location screen will appear. The BAS recommended path will be displayed in the Destination Folder. Click the Next button and the installation will begin.

Note: This process may take several minutes.
6. When the installation is complete, click the Finish button.
7. Open SQL Server Management Studios via Start menu → All Programs → Microsoft SQL Server → SQL Server Management Studio.
 - A. In the Authentication dropdown, select SQL Server Authentication and enter in the following login and password:
Login = sa Password = 5csGPRVwh8LT

Check the *Remember password* box then Click Connect.
8. Restore the backup from the old server.

Refer to the last page of this document for detailed instructions.
9. The iTax_data_connection.udl will now be displayed allowing you to point to the tax database. If it is not displayed, you can locate the file within the iTax directory specified in step #5.
 - A. Enter the SQL Server name in the *Data Source* field.
 - B. Select *Use a specific user name and password:* and enter in the following username and password.
Username = iTax Password = H4VrMyk9F2
 - C. Check the *Allow saving password* checkbox .
10. The installation process is now complete and you will need to set your Update Repository and FoxLock paths following the setup instructions located on page 4.

B. If the tax database is hosted on another workstation or on a server, please follow the instructions below to complete the install:

1. Copy the installer from the FTP site to the local workstation.
2. Once the installer is local, run the installer and then click the Next button.
3. The Choose Components Screen will now be displayed, choose *Workstation Mode* from the Install Type dropdown.
4. Click the Next button.
5. The Choose Install Location screen will appear. The BAS recommended path will be automatically displayed in the Destination Folder field. Click the Next button. The installation will now begin.
6. When the installation is complete, click the Finish button.
7. The iTax_data_connection. udl will now be displayed allowing you to point to the tax database.
 - A. Enter the SQL Server name in the *Data Source* field.
 - B. Select *Use a specific user name and password:* and enter in the following username and password.

Username = iTax Password = H4VrMyk9F2
 - C. Check the *Allow saving password* checkbox .
 - D. In the *Enter the initial catalog to use field*, select iTax.
 - E. Click *Test Connection*. You should receive a window that states 'Test connection succeeded' and then click OK.
8. The installation process is now complete and you will need to set your Update Repository and FoxLock paths following the setup instructions located on page 4.

To complete the setup for the iTax program, please follow the below instructions:

1. Open the iTax folder which can be found in the path specified in step 5 above.
2. Open the update program by double-clicking on UP2D8.exe within the iTax folder.
3. On the left hand side, choose Configure Settings.
4. Set the Update Repository path to the designated iTax Updates folder.
Note: All workstations must be pointed to the same shared Update Repository path which can often be found on the host machine or server. This shared repository requires full control in the security setup, by right clicking on the folder and going into the properties. If you have a single host workstation, you may keep the update repository path local at the default path.
5. Click Save.
6. You then click Check for Updates on the left hand side.
7. Click the **Check for Updates** button at the bottom of the screen to download the current updates.

Release key – **school20**

8. Now from the icon on your desktop, launch the iTax program.
9. You will receive a popup message which says “Unable to locate data. Would you like to locate now?” Click Yes.
10. You will need to locate the FoxLock.dbc file which will be in the designated Data folder in the iTax directory.
Note: You will want to have all workstations pointed to the same file which can often be found on the host machine or server. If you have a single host workstation you may use the foxlock.dbc file in the local iTax directory.
11. You have now finished.

Restore Database Instructions

Restore the backup from the old server

1. Save the backup from the old server onto the new host machine.
2. Right click on the database folder and select restore database.
3. In the *To database* field enter itax.
4. Click on the radial button next to *From device*, then click on the “...” button. Click the add. button and browse to the location of the backup you saved onto the new host machine, click OK.
5. In the window below, click on the box under Restore next to the file name of the backup you just selected.
6. Click Ok on the bottom of the Restore Database window.
7. Expand the database folder.
8. Locate the itax folder and expand that folder.
9. Expand the Security folder within the iTax folder, then expand the Users folder.
10. Right click on the iTax user and select delete.
11. Scroll down until you see another security folder and expand, then right click on the Logins folder and select *New Login*.
12. Set the Login Name to iTax then select SQL Server Authentication and use H4VrMyk9F2 as the password, Click OK.
13. Expand the Logins folder and double click on the iTax user, opening up the Login Properties Window.
14. Select User Mapping in the top left portion of the window.
15. Select the iTax database from the Users mapped to this login window:
16. In the bottom window, Database role membership for: select db_owner.
17. Click OK on the bottom of the window.