

INSTALLATION PROCEDURES



Version 2010 NF v.4.0

September 2011

Single-User Local Installation Instructions

To install the *Cantax FormMaster* 2010 NF program, you must have Administrator privileges. You must also ensure that the workstation's regional settings are set to English (Canada or United-States).

Downloading from the Internet

To download the program from the Internet, proceed as follows:

1. On the "Cantax Downloads" Web page, login under the "Member Identification" section.
2. On the "Files Centre" Web page, select the product you want to download.
3. Read and agree to the terms of the License Agreement by clicking **Accept**.
4. In the "Downloading the Program" section, click the ".exe" link to download the program.
5. Click **Save** in the dialog box to save the file to your computer. Please note: the location where the file is saved does not affect the installation program. The time required to download the file will depend on the speed of your modem and the speed of your Internet connection. Also, note where the file has been saved, as this will make it much easier to locate after downloading.
6. Once the download is completed, open the folder in which you saved the file.
7. Double-click the downloaded setup file.
8. When prompted for the version selection, select **Local version**.
9. Follow the instructions for the remainder of the installation.

Note: Each user will have their own **Options and Settings** and may choose to share **Templates and Client Files**.

Installing from the CD-ROM

1. Insert the *Cantax* CD-ROM in your CD drive.
2. The installation program should start automatically. If not, select **Start**, click **Run**, then browse to the CD-ROM and run "Setup.exe."

3. Follow the on-screen instructions, choosing the appropriate program to install.
4. When prompted for the version selection, select **Install a local version**.
5. Follow the instructions for the remainder of the installation.
6. The *Cantax FormMaster* program will install in a subfolder of the Program Files folder called "CCH\CANTAX FormMaster 2010 NF."

Note: Each user will have their own **Options and Settings** and may choose to share **Templates and Client Files**.

Activation Key

Cantax FormMaster 2010 NF requires an activation key. During the installation, enter the applicable activation key when prompted. The activation key can be found on the letter included with your package.

If a previous version of *Cantax FormMaster* 2010 NF is already installed, you will only need to install *Cantax FormMaster* 2010 NF v.4.0 as an update. If this is the case, the activation key will not be required. However, if you waited for this version to install *Cantax FormMaster*, you will have to enter your activation key in the **Activate Product** dialog box during the installation.

Note: If you downloaded the program from our Web site, the activation key is available in the "Activation Key" section on the download service page of the product. Please keep this key for future reference.

Before Network Installation

Windows Vista and Windows 7: The UAC technology causes a limitation when installing a Network version with regard to mapped drives

If the operating system you are using is Windows Vista or Windows 7, the UAC technology (User Account Control) may possibly limit access to the network locations defined with the mapped drive (example: G:\). To bypass this limitation, you can use one of the following suggestions before proceeding with the installation:

1. Proceed with the installation of the program using the UNC format network locations (example of UNC reader: \\server\folder).
2. Disable the UAC for all workstations from which the **Cantax Network** version will be launched. To find out how to disable the UAC technology, consult the documents provided by Microsoft.

Define the folder for Network installation

A mapped drive or a UNC path can be used to define the destination folder and is required for the network installation of *Cantax FormMaster 2010 NF*.

The transmission database default location, indicated during the installation, is the same format as the one used to define the program's destination folder.

With regard to the default location of the different types of files, including the EFILE database, the format type (mapped or UNC) used for the network installation is independent from the one used by the program.

Thus, if you used a mapped drive format to indicate the destination folder for the network installation, the program will use the same UNC format to specify the default location of the different types of files.

If you want to use the UNC format to indicate the destination folder necessary for the network installation, enter it manually in the appropriate place.

If you want to use the mapped drives to define the network location of those files, once deployment on the server is finished, you must activate the appropriate option from the **Options and Settings** dialog box in the **Advanced** panel of the "Options" section, then define each of the network locations to apply the change. Ensure that all workstations where the **Network** version is to be deployed use the same drive letters to designate the same location, otherwise installation on these workstations will not be completed.

To know more on how to use mapped drives, consult the **Use the Mapped Drives to Define the Network Locations** help topic.

Network Installation Instructions

Note: If the **Network** version of a previous version of the program is already installed, please refer to the "[Updating the Network Version](#)" section.

Prepare to deploy

To deploy the *Cantax FormMaster 2010 NF* program, you must have write privileges to the network folder you will be deploying the application in. To deploy the program, proceed as follows:

1. Log on at any workstation.
2. Insert the *Cantax* CD-ROM in the CD drive.
3. The installation program should start automatically. If not, select **Start**, click **Run**, then browse to the CD-ROM and run "Setup.exe."
4. If you have downloaded the setup file, run the installation program.

5. Follow the on-screen instructions, choosing the appropriate program to install.
6. When prompted for the version selection, select **Network version**.
7. Select the folder to which the program is to be deployed and follow the on-screen instructions. This folder must be read-write accessible to all users.
8. Click **Finish** to deploy the program.

Deploy the program

This step consists in making *Cantax FormMaster 2010 NF* accessible to all users and begins immediately after the deployment preparation step.

1. The license agreement will display. Read it, click **I accept the license agreements**, then click **Next** to continue.
2. Enter your activation key and click **Next**.
3. Enter the requested information in the **Administrator Properties** dialog box and click **Next**.

Note: We recommend that you note this administrator information; it will be required to update the program and make changes to the user **Options and Settings**.

4. If necessary, enter the credentials information in the **Administrative Privilege** dialog box. Click **Next** to continue. (Entering credentials information during installation may be necessary to grant the rights needed to install the required files at local workstations.)
5. The folder where the electronic services database is to be installed is displayed on the screen. Click **Browse** to select a different folder (if necessary) and then click **Next**.
6. Click the **Start CANTAX FormMaster 2010 NF** option to use the program from the server.

Once the deployment on the server is completed, the program must be installed on each workstation.

Installing *Cantax FormMaster 2010 NF* on each workstation

Note: The mapped drive (e.g.: drive H:) used to deploy the program on the server must be the same mapped drive used to install the program on each workstation (e.g.: drive H:).

To extend the program's accessibility, double-click the "2010 NF CANTAX FormMaster.lnk" file from the network location where the program was deployed and follow the prompts to complete the installation. This will install components such as Tax Fonts, shortcuts and other necessary files for the correct operation of the program on the workstation.

Updating the Network Version

To update the version, proceed as follows:

Step 1 - Server update

1. Ensure that there are no users (except for the administrator) connected to the program.
2. In the previous version of *Cantax FormMaster 2010 NF*, select the **Tools/Administrative Tools/Update server** command.
3. Click **OK** in the dialog box displayed on the screen.
4. Enter the administrator's user name and password.
5. Follow the instructions that are displayed on the screen.

Once the update is completed, the program will deploy the file on the administrator workstation and restart automatically.

Step 2 - Update of client workstations

1. The user double-clicks the program shortcut on the desktop or selects it from the **Start** menu.
2. The files necessary to use the program are installed on the workstation following the update.

If applicable, the user must follow the instructions that are displayed on the screen. The program starts up automatically when the update is completed.

Run the Cantax FormMaster 2010 NF Program

To run the program, double-click the 2010 NF *Cantax FormMaster* program shortcut, on your desktop or select the program from the *Cantax* program group located under **Start/Programs/Cantax**.

System Requirements

To correctly execute *Cantax FormMaster 2010 NF*, you must have the following:

Processor

Pentium IV or better (Dual Core processor is recommended)

Supported operating systems

- Windows XP SP3
- Windows Vista SP1 32-bit and 64-bit (except for Starter Edition)
- Windows 7 32-bit and 64-bit (except for Starter Edition)*
- Windows Server 2000 SP4, Windows Server 2003 SP2 R2 32-bit and 64-bit, Windows Server 2008 R1 (32-bit and 64-bit) and R2
- Network File Systems - NTFS, FAT32, Novell 6.5

Note:

* To know more about the different Windows 7 Editions and their respective requirements, consult the Microsoft Web site at: <http://windows.microsoft.com/en-us/windows7/products/system-requirements>.

RAM minimum

1 GB of RAM (2 GB or higher is recommended)

Note: RAM requirements are highly dependent on the operating system used. Please refer to documentation provided with your operating system for minimum and recommended RAM requirements.

Hard drive disk space

The installation requires 50 MB of free disk space on the drive where Windows is installed (by default this drive is C:\) in order to copy temporary files, plus a maximum of 134 MB of free disk space on the drive where the application will be installed.

Monitor

SVGA 800x600 monitor (1024x768 recommended), 65,000 colours

Printer

Laser printer with a minimum of 4 MB of memory (16 MB is recommended) or inkjet printer

Adobe Reader™

Version 9.0 or 10.0 (also entitled Adobe X)

Internet connection

Internet Explorer 6.0, 7.0 or 8.0 with 128-bit security encryption is required to transmit electronically.

Furthermore, an Internet connection is required to use electronic services available with *Cantax FormMaster 2010 NF*.

MMF

CD/DVD media can also be used to transmit MMF.