

Cantax FormMaster

Installation Procedures

Cantax FormMaster 2017 v.5.0

July 2018

Please read **all** of the installation instructions carefully **before** proceeding with the program setup. For network installation, please refer to the "[Network Version Installation](#)" section.

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

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Downloading From the Internet

To download this version of *Cantax FormMaster* from the Internet, proceed as follows:

1. Go to <https://www.cantax.com> and select **Cantax Software** from the **Downloads** drop-down menu.
2. Log on to your "Files Centre" from the "Cantax Downloads" page.
3. In the "Dashboard" page, click the **Files Centre** button in the "Download" section.
4. Click **Cantax FormMaster**.
5. Read and agree to the terms of the License Agreement and click **Continue**.
6. In the "Downloading the Program" section, click the ".exe" link then click the **Save** button to download the program.
7. Follow the instructions on the screen. Once the download has been completed, open the folder in which you saved the file. Double-click the downloaded setup file and follow the instructions.

Installation Instructions

It is strongly recommended that you close any applications you are currently running prior to installing the program.

Where to install Cantax FormMaster 2017 v.5.0

If a previous version of *Cantax FormMaster 2017* is already installed, the installation process will automatically update your program to *Cantax FormMaster 2017 v.5.0*. If no previous version of *Cantax FormMaster 2017* is installed, we recommend that you install *Cantax FormMaster 2017 v.5.0* in the installation program's default folder.

Note: Windows 8.1 and Windows 10 apply a filter named "SmartScreen" which allows you to control the installation of certain programs.

When launching the *Cantax* installation program, the SmartScreen filter may display a warning indicating that the start-up of an unrecognized program has been prevented. This message is issued by Microsoft Windows. The *Cantax FormMaster* installation program is signed using a digital certificate recognized by certification authorities (for more details, contact the Support Centre).

If such a warning displays, click **More info** and then **Run anyways** to continue with the installation.

Local installation

1. Insert the *Cantax* optical disk in your disk drive.
2. The installation program should start automatically. If not, open the Windows File Explorer, then browse to the optical disk and run "Setup.exe."
3. Click **Install Cantax FormMaster** to install the program (optical disk installation only).
4. When prompted, select **Install a local version** and follow the instructions for the remainder of the installation.
5. When prompted, select the destination folder of the application, click the **Browse** button, select the folder where you want to install *Cantax*

FormMaster and click **Next**. If you do not modify the default folder, the program will be installed in that folder.

- When prompted, select the location of the templates, click the **Browse** button, select the parent folder where you want to create the sub-directories required to save the templates and click **Next**. If you do not modify the default folder, that folder will be used.

During the first launch of the program, you will be prompted to retrieve the configuration of a previous version of *Cantax FormMaster* if that version has been detected on the computer.

Activation Key

An activation key is required to install the *Cantax FormMaster* program; simply enter it when prompted. If you are installing the local demo version of *Cantax FormMaster*, it is not necessary to enter an activation key.

To access your activation key, go to <https://www.cantax.com> and select **Cantax Software** from the **Downloads** drop-down menu. Log on to your “Files Centre” from the “Cantax Downloads” page. In the “Dashboard” page, click the **Activation Key(s)** button in the “Download” section.

If you have already installed a previous version of *Cantax FormMaster 2017*, 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.

Before Network Installation

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

The User Account Control (UAC) technology may possibly limit access to the network locations defined in the mapped drive (example: G:\). To bypass this limitation, you can use one of the following suggestions before proceeding with the installation:

- Proceed with the installation of the program using the UNC format (Universal Naming Convention) network locations (example of UNC reader: \\server\folder).
- 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 destination 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*.

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

As for 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.

As a result, 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 enable 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.

For more information on how to use mapped drives, consult the “Use the Mapped Drives to Define the Network Locations” help topic.

Network Version Installation

Note: If the **Network** version of a previous version of *Cantax FormMaster 2017* is already installed, please refer to the “[Updating the Program's Network Version](#)” section.

There are three steps involved in the installation of the *Cantax FormMaster Network* version: preparation for deployment, deployment on the server and installation at each workstation.

Step 1 - Prepare to deploy

To deploy the *Cantax FormMaster 2017* program, you must have write privileges to the network folder you will be deploying the application to. To deploy the program, proceed as follows:

- Log on at any workstation.
- Insert the *Cantax* optical disk in the disk drive.

3. The installation program should start automatically. If not, open the Windows File Explorer, then browse to the optical disk and run "Setup.exe."
4. If you have downloaded the setup file, run the installation program.
5. Follow the instructions on the screen, choosing the appropriate program to install.
6. When prompted for the version selection, select **Network version**.
7. When prompted, select the destination folder of the application, click the **Browse** button, select the folder where you want to install *Cantax FormMaster* and click **Next**. This folder must be read-write accessible for all users.
8. Click **Finish** to deploy the program.

Step 2 - Deploy the program

This step makes *Cantax FormMaster* 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 administrator's credentials in the **Administrative Privilege** dialog box. Click **Next** to continue.
(Entering credentials during installation may be necessary to grant the rights needed to install the required files at local workstations.)
5. When prompted, select the location of the transmission database, click the **Browse** button, select the folder where you want to create the database and click **Next**. If you do not modify the default folder, the program will be installed in that folder.
6. When prompted, select the location of the templates, click the **Browse** button, select the parent folder where you want to create the sub-directories required to save the templates and click **Next**. If you do not modify the default folder, that folder will be used.
7. Click the **Start Cantax FormMaster 2017** option to use the program from the server.

Once the program has been deployed on the server, you will need to customize the various options and settings and define users' rights with regard to customization.

Note: In the event that you have used the previous **Network** version of *Cantax FormMaster*, you can save time allocated to this step by converting shared customized templates and retrieving the network configuration defined from the previous version. For more information on this topic, consult the "[Retrieve last year's configuration of Cantax FormMaster](#)" section.

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

Step 3 - Installing Cantax FormMaster 2017 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 "2017 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.

Procedure for Updating the Network Version of a previous version of Cantax FormMaster 2017 to Cantax FormMaster 2017 v.5.0

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 a previous version of *Cantax FormMaster 2017*, 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, if applicable.
5. Follow the instructions that are displayed on the screen.

Once the update is completed, the program will deploy the file on the administrator's 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, if applicable. The program starts up automatically when the update is completed.

After Installation

Retrieve last year's configuration of Cantax FormMaster

Cantax FormMaster 2017 offers the possibility of retrieving the network configuration and users' customized configurations of a network version of *Cantax FormMaster 2016*. Retrieving the network configuration and the configuration customized by each user, combined with the conversion of the shared customized templates allow the administrator to deploy *Cantax FormMaster* more rapidly. However, to fully benefit from all of the advantages offered by those functionalities, administrators of a **Network** version should comply with the following method:

1. Once deployment of the program on the server is completed, first convert the shared customized templates (client filters, print formats, letters and labels as well as preparer profiles). For information on how to convert the different customized templates, refer to the program's Help.
2. Once the templates are converted, retrieve the network configuration. To retrieve the network configuration of a **Network** version, click the **Retrieve configuration** command available on the **Tools/Administrative Tools** menu. The wizard will guide you through the steps to retrieve the network configuration.
3. Once the program is installed, each user will be able to retrieve the customized configuration during the first launch of the program, if he/she has the necessary rights.

For information on retrieving the configuration, consult the program's Help.

Restarting Windows

Depending on the system configuration, the Install program may prompt the user to restart Windows after installing the program so that the files can be initialized. If the user plans to access *Cantax FormMaster* immediately, Windows must be restarted.

System Requirements

To correctly execute *Cantax FormMaster*, your computer system must have the following:

Processor

Dual Core processor (Quad Core is recommended)

Supported operating systems

- Windows 7 SP1 (32-bit and 64-bit) except for Starter and Home Editions*
End of support: Microsoft will [stop supporting Windows 7](#) in January 2020. Since it is our policy to align our support of operating systems with software vendors, take note that the versions of our software applications that will be released starting in November 2019 will no longer support Windows 7.
- Windows 8.1 (32-bit and 64-bit) except for Basic Edition*
- Windows 10 (32-bit and 64-bit) except for Education and Home Editions*
- Windows Server 2008 R2 SP1
- Windows Server 2012 SP1 and R2
- Windows Server 2016

* For more information on the different Windows Editions, and their respective requirements, consult the Microsoft Web site:

- For Windows 7:
<https://windows.microsoft.com/en-CA/windows7/products/system-requirements>
- For Windows 8.1:
<https://windows.microsoft.com/en-CA/windows-8/system-requirements>
- For Windows 10:
<https://www.microsoft.com/en-ca/windows/windows-10-specifications#sysreqs>

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

Important: While supported, Windows 7 Service Pack 1 does not have SMB 3.0 encryption for data in transit and is not a recommended system requirement for this product. We are strongly recommending that all customers enable the enhanced security measures available in Windows 8 or higher operating system, including SMB 3.0 encryption for data in transit. Since the configuration of SMB 3.0 is explicit, please consult this [Microsoft article to proceed with its configuration](#).

Microsoft .Net Framework

Microsoft .Net Framework v.4.5.2 is required.

Network File Systems

- NTFS
- FAT32
- exFAT

Internet connection

- An Internet connection is required to transmit slips and use electronic services available with *Cantax*.
- The TLS 1.2 protocol must be enabled in the Internet Explorer (10 or 11) browser settings.

How to Reach Us

E-mail

Customer Service:

cservice@wolterskluwer.com

Tax and Technical support:

csupport@wolterskluwer.com

Telephone

1-800-268-4522

Web Site

<https://www.cantax.com>