

SOFTWARE ASSISTANT

SHARED DATABASE

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 on 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 press *Register / Deregister*. This should update the status and expiry periods,

Registration form 2014

1.

Registration details

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

2.

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

3. Register | De-register

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

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

? Help Configure BDE Close this form



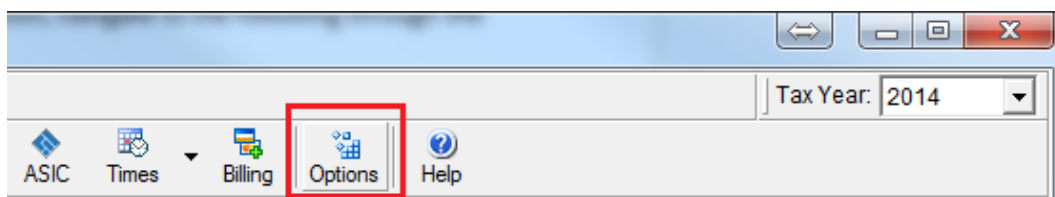
- Any workstation that will be logging to the ATO requires the Cisco VPN client, download the following and install with default settings via the following link:
<https://softassist.com.au/Downloads/CiscoAnyConnect.exe>
- Once Assistant has been installed (on any workstation), navigate to the following 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,
- Once the *Assistant* folder is on the server, on each workstation, navigate to the following through the Windows Start Menu;
Start | All programs | Software Assistant | Register Assistant.

NOTE

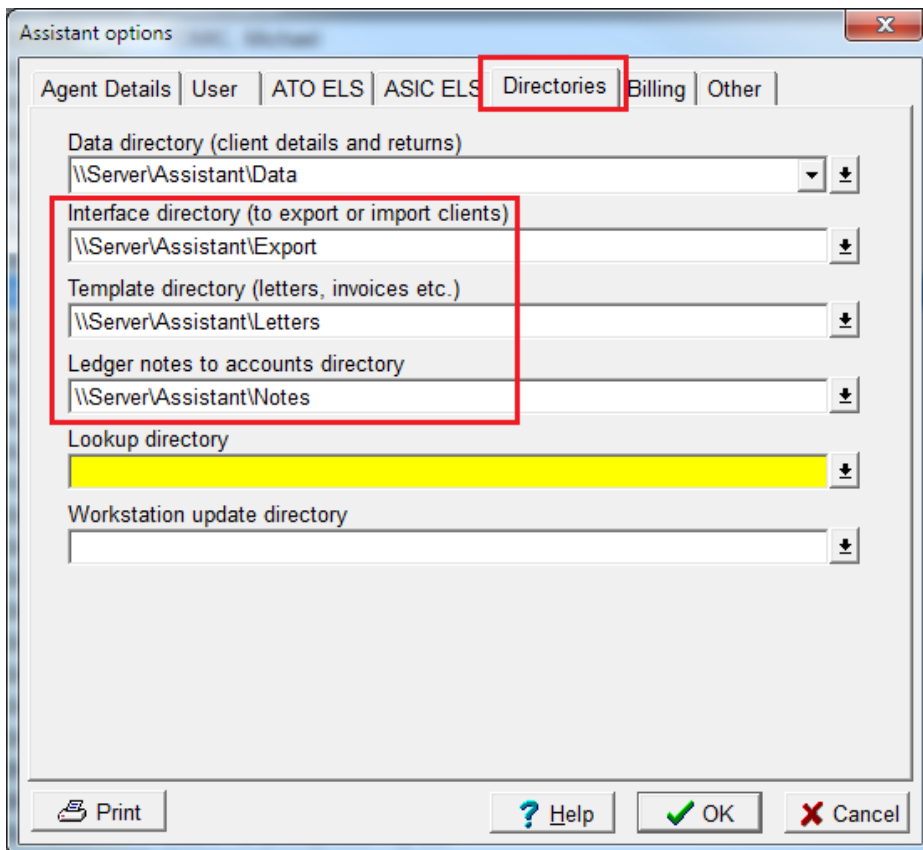
If using Windows 8 or Windows 10 the start menu paths will be different. Consult Microsoft for more information on how to access your Start Menu.

The data directory at the bottom of this form must point to the *Data* folder (located in the *Assistant* folder copied in step 4). Do this on all workstations (e.g. *Z:\Assistant\Data* OR *\\server\Assistant\Data*). You may use a mapped drive, or UNC path as long as they are identical (excluding drive letter) on all machines,

- 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 so, open *Assistant* options as follows:



Open the *Directories* tab and change the **Interface**, **Template** and **Ledger** paths to link to your Server, e.g.



8. 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 press *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. You must install the Cisco Systems VPN client, download the following and install with default settings via the following link, choose **one**:

32bit: <https://softassist.com.au/Downloads/CiscoVPN.exe>

64bit: <https://softassist.com.au/Downloads/CiscoVPN64.exe>

NOTE

You must use the above Cisco VPN rather than Cisco AnyConnect. Cisco AnyConnect will not allow lodgement when more than one user is currently logged onto the Terminal Server.



4. 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.
5. The installation is complete.

Contact us

For further information on configuring a shared database, please contact the Support Desk.

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