

Windows Network Server

The Client Explorer helps you manage all your client data files. Users on a network can share the same database so that the index is constantly up-to-date for all to see, and files never disappear in forgotten local folders.

If you run ProFile on a network and intend to share databases or manage client files between different workstations, you must install and configure a ProFile database server on at least one networked computer. The ProFile Server ensures that different machines can share Client Explorer data across the network. **Note:** If your computer is not on a network, you should not use the ProFile Server installer.

The following instructions are intended for network administrators or for ProFile users who are knowledgeable in systems and network configuration.

What can we share on our network?

ProFile is designed for users in a network environment as well as those on stand-alone workstations. On a network you may choose any or all of these options:

- Share the same ProFile program loaded on a network drive,
- Share a single database to manage and query client files stored anywhere on the network,
- Share a server folder for storing all client data files in one location,
- Share common option settings between all or some users,
- Share word processor client templates, and/or
- Share an EFILE reports folder on a network server (for ProFile T1 and TP1 users).

ProFile has many features that are well suited to a network environment. Audit and review features are designed to offer a flexible system for reviewing files prepared by others. Shared data folders indexed in a single database give senior preparers and partners instant access to the files prepared by junior members of the firm.

ProFile database features such as the query filter, reports and data export are also easy to use on a network. As long as client files are stored in shared folders, the index lets a partner search and filter client files from all workstations to produce comprehensive reports.

Of course, it is your choice whether or not you take advantage of network features. If the preparers or planners in your office are individually responsible for certain clients, each user can keep a separate database, store client files on a local hard drive, and configure ProFile options locally.

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Network configuration

Before installing on a network, make sure that your licence agreement covers the number of users who will have access to the software. If you have any questions, please call us at 1.800.452.9970

System requirements:

To use ProFile, we recommend the following:

- 400 MHz CPU for XP, 800 MHz for Vista (Intel, AMD, or other Windows compatible processor) 1 GHz or faster 32-bit or 64-bit processor for Windows 7
- Windows XP, Windows Vista or Windows 7
- 128 MB RAM for XP, 512 MB RAM for Vista, 1 GB RAM (32-bit) or 2 GB RAM (64-bit) for Windows 7
- Monitor and Video card that supports colour and 800x600 resolution for XP, Support for Super VGA graphics for Vista, DirectX 9 graphics device with WDDM 1.0 or higher driver for Windows 7
- CD-ROM drive (if ProFile is ordered on CD)
- Approximately 150 MB for download and 200MB for install
- HP III Laserjet printer or compatible
- Internet Explorer 7.0 or 8.0 for online help features, Internet-based EFILE services. Internet connection (for downloading our software, ordering single returns/plans online, using Internet-based EFILE services).
- When wanting to share databases of returns or plans between users of ProFile, Classic Database requires any kind of Windows network where files can be shared and accessed by different computers. Client Explorer requires a network based on the TCP/IP Network protocol.
- eReview feature requires a MAPI email client (Outlook Express 4.0, Outlook 97, Netscape 4.03, Eudora 3.0, or better)
- .NET 3.5 or higher version

Types of Network installs

Stand-alone install

If you decide to install ProFile at each individual workstation, you can use your server to distribute the installation program and share updates with all users on the network. This is more efficient than sharing the CD and ensures that all users have access to the same version.

Copy GPSetup.exe from the CD (or any ProFile install program from the web) to a shared folder on your network server. Email your team to let them know when a new version is available. Each user can then browse through Network Neighborhood to run GPSetup.exe and install ProFile to his/her workstation.

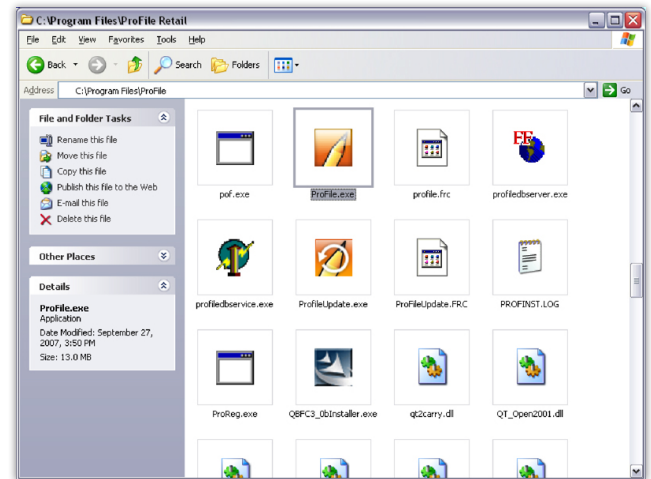
For additional convenience, you can even create a shortcut from each workstation to GPSetup.exe in the shared server folder.

Workstation Install

On a network, you may find it advantageous if all workstations run ProFile from the same .EXE file, installed on a network server. Using this setup, the network administrator can load a new version of ProFile on the server and instantly update the software at all workstations. Note that if you are using windows NT4, 2000 or XP, you will need to be logged in as an administrator in order to complete a workstation install. *(We recommend a workstation install to a maximum of 20 users. A higher amount may slow down your workstations.)* Do not run a workstation install on a laptop computer that uses ProFile while disconnected from the network.

The advantage to this process is the speed of installing updates throughout the season. There are no performance problems since ProFile is loaded into the RAM memory of each workstation that launches the shared .EXE file. Keep in mind however, that for any length of time your server is unavailable, no workstations will be able to run ProFile (unless users install the latest version of ProFile locally).

- 1 Install ProFile in a shared folder on your server (for example, e:\shared\profile).
- 2 In this folder, look for two icons: "Workstation Install" and "ProFile.exe".
- 3 Workstation Install is a shortcut with this target property:
"e:\shared\profile\profile.exe" /register
- 4 To set up ProFile on a workstation, the user needs to browse through Network Neighborhood and double-click this shortcut in the shared network folder. The "/register" parameter updates the Windows™ registry at the workstation, and tells Windows where to find all the module files when the user launches ProFile.exe.
- 5 After launching with the Workstation Install shortcut, configuration is complete. To run ProFile next time, a user will need to double-click the ProFile.exe icon in the server folder. In fact, Workstation Install and the ProFile.exe icon both launch the program; however, the register command associated with Workstation Install makes the launch a bit slower, and is only necessary for the first launch of the software at each workstation. Now each user is running ProFile directly from the server.
- 6 You may want to create a desktop shortcut at each workstation that runs ProFile.exe from the network server. You can do this using standard Windows™ features.



Network Configuration

There are 3 different types of network setups:

- **Server Client Install** (Windows 2000/NT) – This is a network in which a master computer (server) does nothing more than store data and provide services. Returns are not completed on this machine.
- **Peer to Peer** – Peer to Peer networks have no central computer (server). Each computer on the network can share its resources and access resources on another computer

When you set up your network, keep in mind that you will need to use a UNC (Universal Naming Convention) network name common to all users on your network. This resource, developed by Microsoft, allows users to access files over a network. *You may also choose to use a mapped network drive (such as a T: drive).*

What are UNC file names?

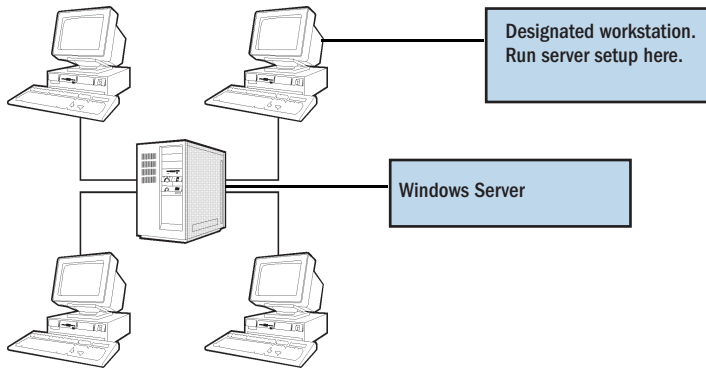
UNC stands for Universal Naming Convention, a system that lets networked computers recognize each other without assigning or substituting drive letters on each local machine. We recommend UNC for users sharing client files or using Client Explorer features on a network.

UNC file names are not only important in the Client Explorer. An options package stores the location (pathways) of your database, templates and shared data folders. When you are configuring options for an options package, always browse for files through Network Neighborhood, even if the target files are on the workstation you are using!

The reason for UNC filenames? Each computer assigns drive letters to drives (C:, D: etc...). Let's say you store a client file on your network drive L:\RETURNS. Another user may want to access that file, but at a different workstation where the network drive has been mapped to G:\RETURNS. The shared database will think the file is on L:\RETURNS and will deny access to the second user (because ProFile cannot locate the file).

The solution is to use UNC file names. All computers have a name (look under the Microsoft Windows™ Start Menu: Settings > Control Panel > Network > Identification.) If your server computer is called SERVER, then the same network drive (identified as L:\Returns or G:\Returns above) would also be known as \\SERVER\RETURNS. Every computer on the network can recognize this path name, no matter what drive letter is configured on each machine.

Client Explorer Server Install - Windows Network

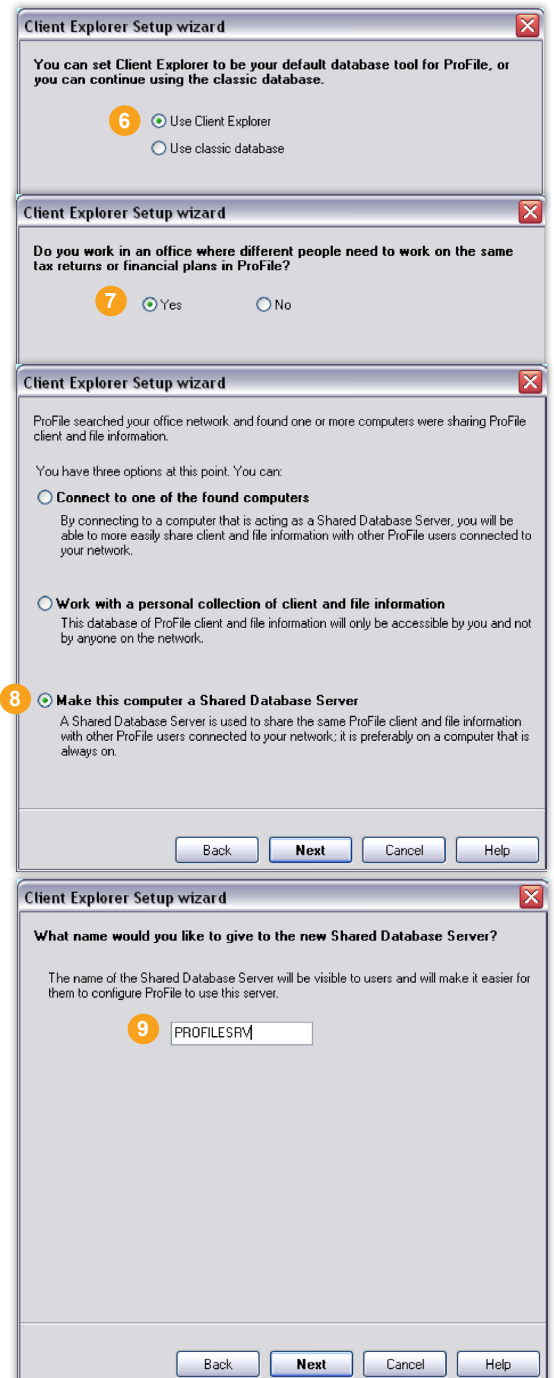


Note: If you want to share databases from more than one computer on the same network, or if you want to install a shared database on a server, you must first install ProFile on the computer(s) that will share a database.

Once you have designated a workstation, install and configure the ProFile Server:

1. Insert your ProFile CD in the CD-ROM drive of the computer, (or double-click the gpsetup.exe download) on the computer where you want to install a shared ProFile Server. Follow the installation prompts to install ProFile.
2. Launch ProFile.
3. Go to Options > Database.
4. Select Use Client Explorer.
5. Click Setup Wizard and click Next.
6. Select Use Client Explorer and click Next.
7. Select Yes and click Next.
8. Select Make this computer a Shared Database Server and click Next.
9. Give the ProFile Server a name and click Next.
 - Give the Database a more descriptive name if you want, especially if you will share multiple databases on your network.
10. Click Finish.

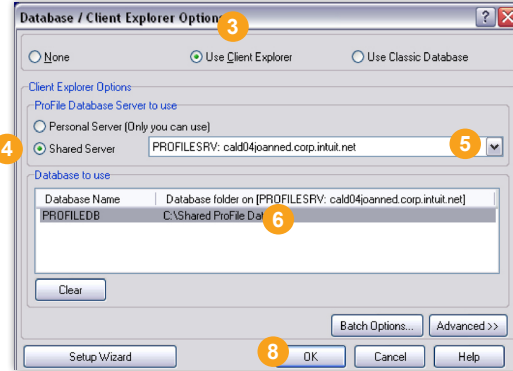
You will now be able to point other workstations to the shared database.



Share database between workstations

To point other workstations to the shared database you have installed:

- 1 Launch ProFile from another workstation (other than the workstation on which the Server is installed).
- 2 Go to Options > Database.
- 3 Select Use Client Explorer.
- 4 Select Shared Server. ProFile will search for databases shared on the network.
- 5 Select a ProFile Server from the drop-down list.
- 6 Highlight the database on the server that you wish to use.
- 7 If your server is properly set up, you should see your database name appearing in the list under the 'Database to use' section. This step will have to be repeated at every workstation where ProFile is installed.
- 8 Click OK to exit the Client Explorer setup.

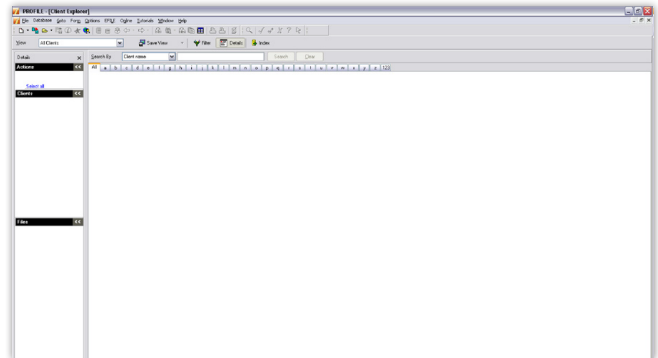


The path shown under 'Database folder' C:\Shared ProfileData is local to the database server machine.

Client Explorer Options

Client Explorer

To view the Client Explorer window, click on OK and select Goto > Client Explorer.



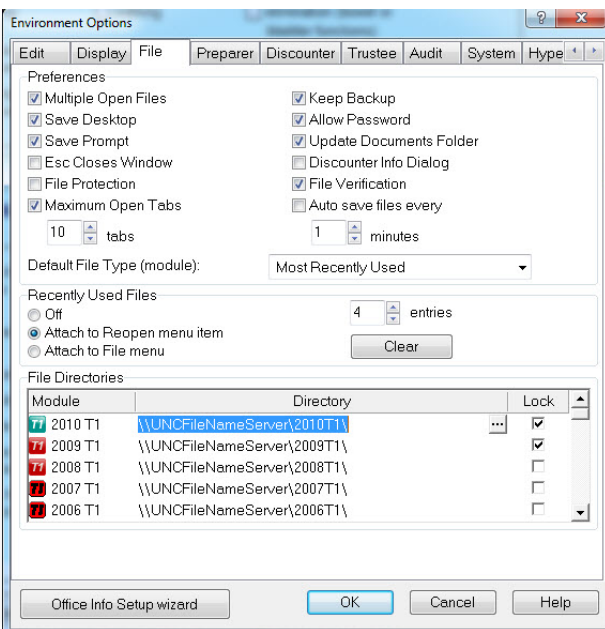
ProFile Client Explorer

The first time you open the Client Explorer, it will not display any client files. If you have existing ProFile or competitor files, you must have ProFile scan your hard drive and create an index of them in the Client Explorer. Indexing should only have to be done on one workstation. Once you have created the index on your primary workstation, all other workstations will display the files.

File Directories

Make sure that the file directory for each module is pointing to the network server:

Select Options > Environment > File.



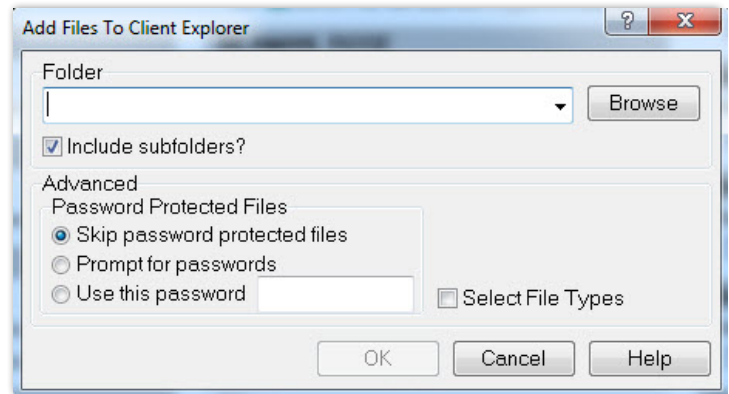
File Directories

The directory that appears under the File Directory section should be a UNC network name (i.e. \\server\share) or a drive mapping that is common to all ProFile users across the network. Otherwise, other users will not be able to access the files via the Client Explorer.

Index Client Explorer

To create an index in the ProFile Client Explorer:

- 1 Click the [Index] button of the ProFile Client Explorer.
- 2 [Browse] to enter the folder location of your files. This should be a UNC file path or the drive letter where all your ProFile data files are stored. Remember: If you are using a drive letter, it should be common to all ProFile users on your network. Otherwise, the Client Explorer will not function properly.
- 3 Click [Ok] to begin indexing your files. A status box will appear on the screen showing you the progress of the indexing process. Once ProFile has created the index, the dialog box will disappear and you will see client names on the tab of the Client Explorer.
- 4 If your client files are stored on more than one computer you will have to repeat the index process for each workstation where data is stored. The ProFile database server will keep a common index of all the files on the network regardless of which computer the files are stored in.



Index Client Explorer

Use ProFile on a Network

Store files in a network directory

ProFile allows you to store client files anywhere on a shared server or shared local hard drive. Since a shared database tracks client files anywhere on the network, your file management is easy, no matter where files are stored.

Hint: Using this same configuration, you can also share a file template for any or all of your ProFile modules. A file template lets you set common information once for all your new client files.

For each ProFile module, you can set a default folder where you store your client files (if you don't set a default, ProFile will select the same folder where you last stored a file of this type).

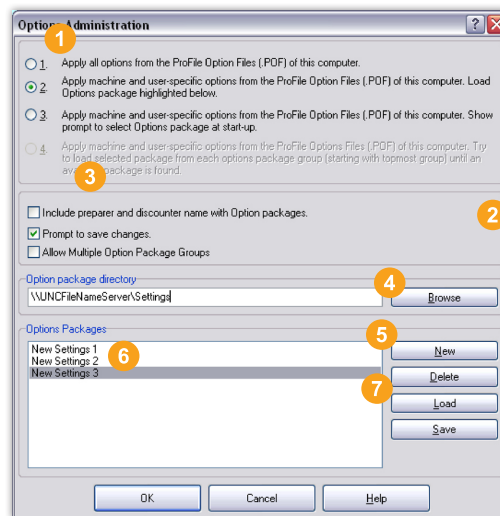
- 1 Go to Options > Environment.
- 2 Select the File tab.
- 3 At the bottom of the dialog box, click the pathway next to a module. This will place a cursor on the screen so that you can edit default location for your files.
- 4 Type the pathway to the shared network folder where you want to store client files. Use the UNC network pathway rather than the letter of a mapped network drive (\\server name\folder name *not* F:\folder name). [We recommend that you use UNC file paths, however, if you have a common reference - i.e. a common mapped network drive, this is acceptable as well.]

You can set this pathway at each workstation, or set it once and save to an options package that everyone loads. When any user saves a new client file, the Save dialog box will default to this network files folder.

Options Administration

ProFile can store your options configuration in the Windows™ registry, or in an options package in the folder that you specify. If you store options in the Windows™ registry, those settings apply only to the workstation where you have configured the options. If you create a ProFile options package, you can easily share settings across a network for all users. Open **Options > Options administration**:

- 1 Choose one of these options to determine how ProFile will store and load your configuration settings.
 - **Select 1** to store your entire options configuration in the machine's registry.
 - **Select 2** to store your configuration in an options package and load that package each time you start ProFile.
 - **Select 3** to store configurations in different options packages and choose which package to use each time you start ProFile. This choice is ideal if several users share a machine and each wants to customize ProFile.
- 2 ProFile handles the identification options separately so you can save these in the Windows™ registry as user-specific settings OR in an options package available for sharing. Under Options > Environment, the identification options are: preparer name, email, preparer initials, partner initials and discounter or trustee information. In the EFILE options, EDI transmitter fields are also stored in the registry or an options package. Select this feature when you want to use the same identification at all workstations in the company.
- 3 Select **Prompt to save changes** if you want ProFile to remind you to save configuration changes into the options package you were using during the session.
- 4 Click [Browse] to search your hard drive for the Settings folder where you will store your options packages. When ProFile creates your new options package, it creates a new folder *inside* the folder you select here. If you are using options packages over a network, make sure you enter the path to this directory using a UNC file name. If you do not want to use the default Settings folder, you will need to create a new folder using Windows™. For example, you may want to create a shared settings folder on a network server. Highlight the folder that will store your options package(s) and click OK.
- 5 Click [New] and type the name of an options package. ProFile will create a folder by this name inside your options package folder.
- 6 Highlight your new options package and click [Save]. ProFile stores the current ProFile configuration from the Windows registry of the workstation into the selected options package.
- 7 If you have more than one options package with different configuration in each, highlight a package and click [Load] to use the settings in that package.



To modify an existing options package, first [Load] that package. Make your configuration changes. Then, return to Options Administration and [Save] the options package. **If you forget to save your latest changes, you will lose them** when ProFile reloads the older options package the next time you start the program.

If you take the time to configure one workstation with all the sharing features, you can then create an options package from the configured workstation. Save your entire configuration into the options package. If you have used UNC file pathways, you can simply load this options package at your remaining workstations to complete network configuration.

ProFile updates may add new configuration options. Your configuration will show the default setting for the new option, even if you use an options package. If an existing option changes (for example, if we modify a CRA print set from Options > Form selection to reflect new filing requirements), version release notes will advise you that the change is one you will need to make in your options package.

Tip: Include your options package folder in your regular back-up routine. If you ever need to restore all your settings, you will save time.