

# TAXWISE CLONES AND COMPUTER WORKSTATION NUMBERS

## THE ISSUE

The computer on which a TaxWise clone is prepared should be a stand-alone computer without an assigned workstation number. A TaxWise clone prepared on a computer that has an assigned workstation number will not install properly on other computers. This document describes how to detect and remove the workstation number so that a valid clone can be prepared that will install correctly on other computers.

## INTRODUCTION -- WHAT IS A TAXWISE CLONE FILE?

**A TaxWise clone is one or more files (usually on a CD or on a flash disk) that can be used to transfer and install TaxWise from one computer to other computers.** Some clones are quite simple, e.g. Copy all C:\UTSxx files to a CD or flash drive, then run C:\UTSxx\TWTech\setup.exe to install. A slightly more complex clone is to zip all files into a \*.zip file, then use a program such as Chilkatzip.exe to create an executable file that includes the C:\UTSxx\TWTech\setup.exe command. Then the user simply runs the resulting (name is arbitrary) TW05\_Install\_to\_C.exe file to install a clone to another computer with the same setup files, the same defaults, etc. The most elaborate clone system I know of is used by FL2 (or one of the other Florida "states") and includes an elaborate structure to make the clone appropriate for all sites in the "state". In that system, the user selects (changes) values for a few fields in TaxWise using pre-defined locked "pick" lists. Regardless of the complexity, a TaxWise clone is just a way to transfer and install TaxWise with the same defaults, etc to other computers.

Clones are used widely in Tax-Aide. For instance, In Virginia we distribute a training CD with integrated training files, a TaxWise clone file that includes the VA tax module and a preset training EFIN and matching registration code, the files for the VA version of the Qualification Workbook, and various other files to any volunteer (not just new volunteers) for practice and study. We try to make the use of this CD as simple as possible for volunteers. We find that volunteers who have practiced TaxWise use with this CD are much better prepared when they come to the training classes and also during the first week at a tax site.

Another use of clones is in backing up the copy of TaxWise on a stand-alone computer or a server computer if a LAN is used.. A copy of the entire UTSxx directory or a copy of the encrypted file containing the UTSxx files is copied to a flash drive or a CD. Then we have a full backup of the entire TaxWise program that can be installed on a replacement computer if the server computer becomes un-operational.

## **HOW WORKSTATION NUMBERS MAY INTERFERE WITH CREATING A TAXWISE CLONE FILE**

Care must be taken when preparing clones of the TaxWise program for general use. The computer on which the clone is prepared should be a stand-alone computer and not a computer with a workstation number. A workstation number is automatically added if the computer is used on a LAN where only the "server" computer has a copy of TaxWise and all other computers access TaxWise on the "server" computer.

**Before a TaxWise clone is prepared, check the status of the following items should be verified and corrected as necessary:**

(1) Open the C:\UTSxx directory (where xx is a year, e.g.C:\UTS05) and check for all files named SETUP.\* (where \* is any value). Delete all SETUP files except for SETUP.0 (the extension is zero). [If you want, you can copy SETUP.364 (or any other workstation setup file) to SETUP.0 before deleting all except the SETUP.0 files. This will set the defaults the same as for Workstation 364.]

(2) Check to make sure that the computer does not have a workstation number (see instructions below).

(3) Check all desired defaults, then carry out the clone procedure.

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## **HOW TO CHECK THE WORKSTATION NUMBER FOR A COMPUTER**

A stand-alone computer does not have a workstation number set as an environment variable in My Computer. A computer used on a LAN has a workstation number that is set to identify each computer uniquely. The presence of a workstation number fouls up preparation of clones etc. that will be used on stand-alone computers.

**To check (and delete if necessary) the workstation number for any Windows computer:**

- (1) Right-click on "MY COMPUTER".
- (2) Select "Properties"
- (3) Click on the "Advanced" tab
- (4) Click on "Environment Variables"
- (5) In the bottom panel,
  - (a) Scroll down to the bottom of this panel.
  - (b) Look for a line that reads: "WORKSTATION xxx"  
(where xxx is the workstation number).
  - (c) Highlight this line, then press the "Delete" button.
- (6) Click "O.K.", then "O.K." again to exit.

**THIS RESETS THE WORKSTATION NUMBER TO ZERO WHICH IS THE WORKSTATION NUMBER FOR A STAND-ALONE COMPUTER.**

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**MORE TECHNICAL DETAILS ON WORKSTATION NUMBERS AND TAXWISE:**

Finding a situation where TaxWise apparently "misbehaves" on a computer an often be traced to the Workstation number, and if a clone is made on a computer that has at some point in time been used on a network. Then the "cloned" files have some information in them that may not match some windows settings.

The key is where TaxWise stores the "Workstation number".

SETUP.0 is created when TaxWise is first installed, and you go through the very first SETUP process to register the EFIN. If that computer is ever used on a network additional SETUP.nnn files will be created if the computer runs TaxWise from another computer. Server.nnn is the workstation number, and there will be a SETUP.nnn file for every workstation, including the Server.

The workstation number is also "set" in Windows - completely separate from any of the TaxWise files. That Windows setting will stay even if TaxWise is uninstalled and the entire TaxWise folder (C:\UTS05) is deleted. The Workstation number is maintained in the System Environment Variables. To get at the setting:

Right Click on My Computer

Select Properties

Click on the Advanced Tab

Click on Environment Variables

In the lower windows scroll down to find the Workstation entry. It can be deleted, or changed.

It can even be added if it does not exist, but it's better to let TaxWise do that as a part of the Workstation Setup routine.

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