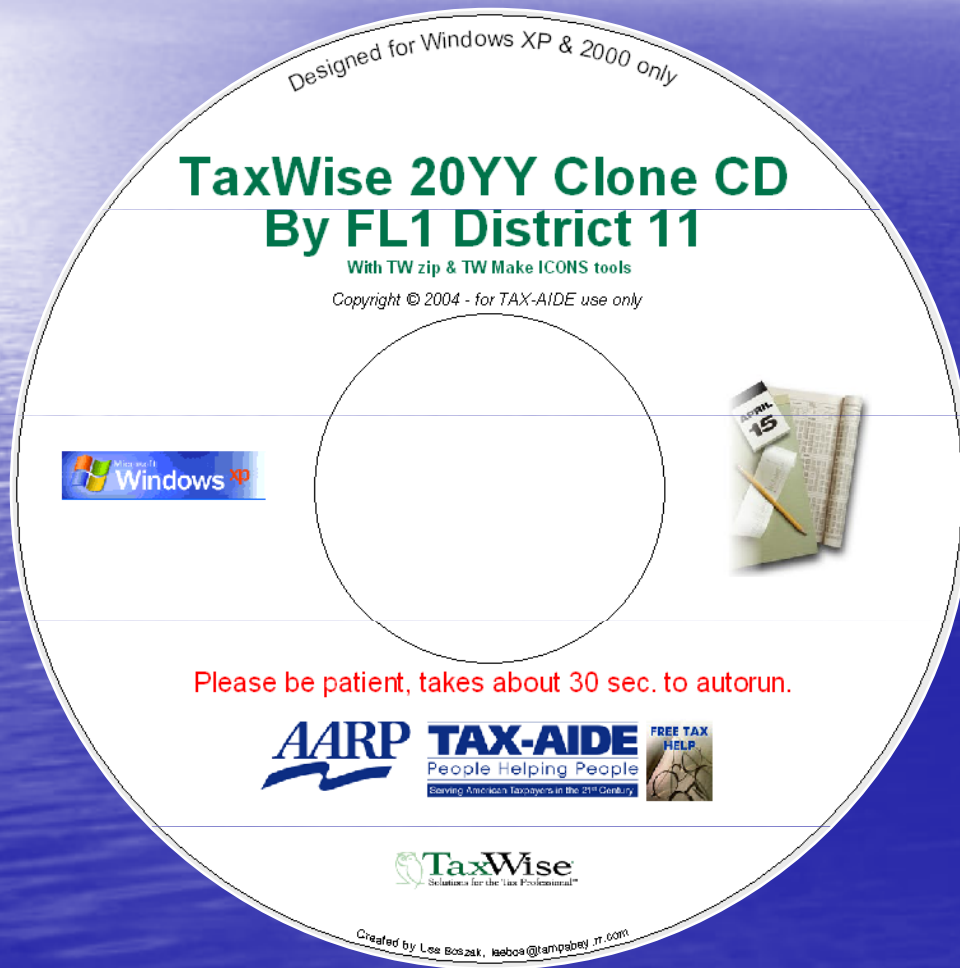




TAX-AIDE
People Helping People
Serving American Taxpayers in the 21st Century



TaxWise 20YY
Clone CD
Version 8
By FL1 Dist. 11

Objectives:

- Facilitate the installation of TaxWise
- Ameliorate problems encountered by errors in individual installations
- Provide TC control of installation process and defaults

Related topic:

Creation and Use of desktop
ICONS (with different setup files)
for computers used at multiple
sites with different EFINs

Why ?

- TaxWise 20YY clone CD by FL1 Dist. 11 is used to load multiple computers with an exact image of TaxWise copied from the host computer. This can save a great deal of time in resetting training computers after a training session or in loading computers for use during the tax season.

The Process: ... major steps

- Install TaxWise on host computer per TaxWise User Guide, Pub 3189, & AARP Tax-Aide Technology Management Guide
- Set up Tax Form Defaults and Print Packets
- Create a TaxWise user for each Site
- Create a desktop ICON for each Site
- Include desktop references and Printer Drivers
- Create ZIP file of TaxWise Folder
- Burn new CLONE CD with created ZIP file(s)
- Run CLONE CD installer on all computers

Benefits:

- Easy to use Windows point & click graphical interface.
- Multiple tax years can be installed from one CD, (prompts for input year).
- Adaptable for use by all districts.
- Mobility -- all computers can be used at all district sites without full re-install
- Includes TW Make ICONS to automate creation of batch files and desktop ICONS/shortcuts for multiple sites.
- Includes TWzip to automate zipping the UTS folder from the host computer.

Limitations:

- TaxWise structure **must** be fully understood to create the initial host computer setup – no short cuts here
- While version 8 can be used for computers on a LAN, TaxWise client/server networking is not fully supported – Coming in Version 10
- A LAN may be used for printing

TW Make ICONS

- When one computer will be used to prepare taxes for multiple EFINs the TaxWise setup may have to be updated and when one computer will be used at multiple sites the TaxWise user has to be selected at each site.
- In the TaxWise program there is a file that keeps track of the last setup and user information; this file is used to start TaxWise with the same EFIN, initial forms, print defaults, and user as when TaxWise was closed.
- This file can be captured (called a snapshot) and associated with a desktop ICON so that when the computer is moved to a different location, clicking on the ICON will reset the "last setup" file in TaxWise to the user associated with the new location. This will eliminate the need for counselors having to manually reset the TaxWise Setup Options for use at a new site.
- TW Make ICONS will do this for you with minimal input.

Expert to novice - Concept

- National provides basic CD to TCSs and describes capability on EXTRANET
- TCS modifies Clone Disk for State
- TC installs host computer with all information – creates District Clone Disk
- TC or trained LCs and EROs can Clone local computers
- Counselor can run Clone Disk at direction of LC/ERO/TC if necessary

For More Information

- Many users of this tool set are members of the Tax-Aide Volunteer Operations Group (T-VOG) Yahoo! group, a collaborative information exchange for AARP Tax-Aide volunteer leaders nationwide.
- For more information about T-VOG and to obtain access to the FL1 District 11 Clone Tools, visit <http://groups.yahoo.com/group/T-VOG/>