

**Checklist for “Networking TaxWise for Tax-Aide”**  
*Item Numbers refer to those in the January 23, 2009 revision.*

**Part 1 - For All Computers (To make your life easier when networking TaxWise)**

1. Use the identical Windows log-on account name (volunteer) and password on ALL COMPUTERS.
2. Set Computer Workgroup to VOLGROUP; Set Computer Name to T2000xxxx, where x’s are Asset Tag Number
3. Turn Disk Write Caching OFF. *(Required on AARP and IRS Depot Computers this year, except AARP HP 6310)*
4. Windows Firewall: The Windows Firewall Service must be running; but make sure the Windows Firewall itself is turned OFF (Control Panel, Windows Firewall).
5. AVG Firewall: Open User Interface and then Firewall: Disable for initial setup; then enable “Computer in Domain.”
7. Network Connections (Control Panel), Go to Local, Properties, General: Make sure all boxes are checked. Then highlight Internet Protocol, Properties, General and verify IP and DNS addresses are obtained automatically.
9. Control Panel, Folder Options, View: UNCHECK boxes: Auto search, Hide Extensions, & Use Simple File Sharing.
10. Control Panel, Power Options: set to Always On; check box for Password on Resume from Standby. **Restart PC.**

**Part 2 - Connect Computers & Share Printer(s)**

- 1-3. Connect printer to a computer (Print Server) & install printer driver if necessary; print test page; set as default.
4. In Printer Properties, share the printer on the network; give it a short share name.
5. Use the Add Printer wizard to access the shared network printer from all workstations; set as Windows default.

**Part 3 – Setting up TaxWise on the Network**

1. **Set Up Server (Recommend using AARP computer if possible. IRS Depot computers not recommended.)**
  - a. For Depot units: Share C: drive, create new share, TWSRVR\_C, “Everyone” Permissions: Allow full control.
  - b. For units using TrueCrypt, click the TCx1 (or 2) Start icon and answer “Yes” to the server question. The drive will then show the shared hand (click refresh if necessary) *(This is a change; it’s not necessary to share P or S as is done for C, as the TCxn Start procedure shares the drive(s) for you.)*
2. **Set Up Client Workstations (Turn off AVG Firewall during mapping and workstation setup)**
  - a. Right click My Computer; select Tools, Map Network Drive. Select a drive letter (J:) for the server’s share.
  - b. Click Reconnect at Logon, and Browse. Click on TWSRVR\_P, o.k., Finish.
  - c. If the server isn’t shown in Volgroup, first check the Firewall Settings and then disconnect any mapped drives no longer used. *(See also note below and Appendix B).*
  - d. Repeat if S or Q Drives are active.
3. **Install and Configure TaxWise on the Server**
  - a. Install TaxWise from a TaxWise CD; reply “YES” this is a Network Install. Assign workstation 101. **Restart PC.**
  - b. Log on as Admin; from Setup Options, General tab, check Network and Save as Workstation Defaults.
  - c. On the Printer Tab, choose the network printer in all three boxes. Click Finish, and Close TaxWise.
  - d. Right click My Computer, Properties, Advanced, Environment Variables, System Variables: scroll down to a Workstation entry. Make it 101. If not there, set up new variable: name=workstation, value=101. **Restart PC.**
4. **Setup and Configure TaxWise on Client Computers**
  - b. From My Computer, open the mapped network drive TWSRVR\_P(J:); then UTS08, then TWTech. Double click Setup.exe to install TaxWise workstation on the client computer; answer 102 (or different 3-digit number) to Workstation Number question (must not start with a zero).
  - d. If Internet Explorer 7 is installed: From Tools, Internet Options, Security, Local Intranet, Advanced (**Uncheck top box here**, the other 3 will be checked): Type J: (or whatever drive letter you mapped to the server’s share), Click Add, then Close, then OK.

**Restart the computer** to save the TaxWise icon on the desktop.

Launch TaxWise using the “TaxWise 2008 on J Drive” or whatever drive letter you mapped to the server’s share.

**For Troubleshooting:** Make sure each step has been completed; then check Appendices B and D. If there is a problem in mapping, Type \\Servername\Sharename (\\T2000xxxx\twsrvr\_p) into the Folder box rather than Browsing.