

If you have been using Tax Assistant on a standalone computer, your data files will be stored on that computer. When you have a network installed, you will probably want to transfer your data files to the network server. There are several advantages in doing this. If you have several workstations running Tax Assistant, they will all be able to access a common client database and a common pool of Tax Return files. Another major benefit is that your data will be backed up automatically whenever the server disk is backed up. In most networks this is done on a daily basis, thus ensuring that, at worst, one day's work will be lost if a disaster, such as a disk crash, occurs.

In this application note we describe how to transfer your data from a standalone computer on to a network server then configure your computer to access that data. We assume here that you are transferring data from a single workstation on to the server. There are additional considerations if you wish to merge data from more than one workstation on to the server. These will not be dealt with here, although one option is to create separate data folders on the server for each workstation, in which case the procedures described here can be applied to each workstation.

The procedure will be illustrated by an example. We assume a Windows type network where each computer has a name and shared folders have share names. If you are not familiar with this concept you should consult your Windows documentation before continuing. The booklet 'Getting Started' issued with the Windows operating system gives a concise but clear description of how to set up a Windows network.

We will illustrate the procedure by means of an example. We assume that you have a network server called 'SERVER' and its C: drive has the share name 'C', which has full read/write access.

In the following procedure, all steps can be carried out from your network workstation, i.e. the computer on which your Tax Assistant data is currently stored.

Step 1: Create a Tax Assistant data folder on the server

1. Start Windows Explorer and navigate through Network Neighbourhood to select the C folder on SERVER.
2. Use **File | New | Folder** to create a new folder; call it TAXDATA. You have set up a folder on the server with an access path \\SERVER\C\taxdata.

NOTE: the double backslash at the beginning; this identifies SERVER as a computer name. The single backslashes are used to separate the computer name, the share name and the folder name.

Step 2: Copy all Tax Assistant data files on to the server

This step is also carried out in Windows Explorer. Unless you have set up a separate folder on your workstation to hold your Tax Assistant data, the data files will be in the same folder as the program files (The default is 'C:\Taxass' or 'C:\Program Files\Tax Assistant').

1. In this case, select all sub-folders in the Tax Assistant program folder. If you have set up a separate data folder, select all sub-folders in that folder instead.
2. Copy all the selected sub-folders into \\SERVER\C\taxdata. This puts all your Tax Assistant data on to the network server.

NOTE: Unless you are an experienced user of drag-and-drop, do not use that technique to copy the sub-folders and files, since an error could have catastrophic consequences for your data. Windows is very unforgiving to inexperienced drag-and-drop users.

Step 3: Configure the Tax Assistant programs to point to the data in your Tax Assistant data folder

1. Click on the **'Data Folder'** button on the Tax Assistant Desktop to run the Data Folder program. This program enables you to create and update Tax Assistant data folders and configure your Tax Assistant programs to access their data in these data folders.
2. In the text box labelled **'Data Folder'**, enter the full directory path to your data folder. If, at step 2 above, you copied your data into the folder '\\SERVER\C\taxdata' on the network server, enter the following in the Data Folder box: \\SERVER\C\taxdata
NOTE: It is very important that the text in this box is the exact directory path to the data folder on the server.
3. Click on the **'Configure'** button to open the **'Configure Programs'** dialogue box.
4. In the **'Programs'** frame click on the **'Select All'** button to select all your Tax Assistant programs for configuration.
5. In the **'Folder'** frame select the number you want to allocate to that folder. If you are only using a single data folder, leave the folder number set to 1, but if you require multiple data folders you will have to configure the system for each folder, allocating a different number (1-4) to each one.
6. Enter any suitable name for your data folder (e.g. 'Tax Assistant data') in the box labelled **'Name'**. If you want this folder to be the currently selected folder after you have configured the system, tick the box labelled **'Tick this box to make the folder selected above the current folder'**.
7. Click on the **'Configure'** button and confirm that you want to configure the selected Tax Assistant programs.

Having carried out Steps 1-3 above, you should now be able to access your Tax Assistant data on the network server just as though it was on your local computer.

If you have any difficulty with the above procedure, please check carefully that you have followed each Step correctly. If you continue to have a problem, visit our [Ask a Question](#) page and submit your question to our support staff, giving as much detail as possible about the difficulty you are having.