

## **Advanced IT Considerations for Installations**

### **General:**

The initial file that is downloaded is a compressed (ZIP) file and may be "saved" anywhere you wish. When this file "unzips" it will create an installation folder. The default is "DSDSetupYY" with "YY" being the reporting year. However, you may change the name if you wish. This folder will contain everything needed to install the IRS Reporter. The install process will start automatically after "unzipping" and will prompt you for where you want the IRS Reporter to be placed.

**Important note:** For installations with multiple licenses (multi-user systems), the DSDSetup folder should be located on a shared network folder (mapped drive is easier but not necessary) that is accessible to all the workstations where the Reporter will be installed. This allows the install to automatically tailor the workstation with the correct path and other pertinent information. It's usually easiest to place it where the Network component of the IRS Reporter will be located.

The Reporter requires that it be located in a folder or sub-directory named IRXyy and will create the folder if it doesn't exist. The Network and Workstation components both have the same IRXyy folder name requirement. The Network component also requires and will create several additional sub-folders within the IRXyy folder (the Workstation requires only a "TEMP" folder which it will create). These sub-folders cannot be moved or located elsewhere.

### **Typical Network/Workstation Installation (Single or Multi User): (You may use "Remote Access" to install)**

The IRS Reporter is designed to have the data and most of the IRS Reporter's system related files reside on a shared network drive or folder. The software (program) and help files **MUST** reside on (be installed on) the workstation(s). We recommend this configuration even for single user systems because it affords better protection for the data and makes updates to the IRS Reporter software easier.

**Note:** Beginning with the 2008 System, the IRS Reporter for all tax years will be installed in two separate folders – IRSReporterNW for the Network Component and IRSReporterWS for the Workstation Component. This will facilitate keeping track of the Reporter's location for historical, updates, and support purposes.

The workstation software **MUST** be installed on each workstation (up to the number you have licensed) from which it will be used. **THIS IS NOT OPTIONAL!** You cannot install the entire package on a network drive or server and expect it to work from any other workstation - it won't.

**Important!** The Network installation **MUST** be done from one of the workstations that will be using the system, and **not from a server**. You should install the "Network Component" first and then the "Workstation Component". Either order works, but network first is preferred. Both should be installed on and from the same workstation. This allows the installation software to keep track of where all the pieces are located and to build the path information required for the functioning of the Reporter and for the installation of additional workstations. The process is easier if you map the shared network drive/folder to a drive letter on each local machine. However, you may use the full network path (i.e. \\servername\sharedfoldername\).

If you have a multi-user IRS Reporter System, the easiest way to install additional workstations after the first is as follows.

From each additional workstation:

1. Navigate to the "DSDSetupYY" folder (or whatever you named it) created in the first "unzip" step above.
2. "Run" or "execute" (double-click) the DSDInstl.exe application located in the above folder.
3. Accept the DSD licensing agreement, then select "Workstation Component"

You may also copy the **contents** of the DSDSetup folder (not the folder itself) to a CD which creates an "auto run" CD that can be used to install each additional workstation (up to the limit of your licenses). However, this option will require that you manually tailor the path information for each workstation. If you use this option, make sure you only install the Network component once.

## **Single user installation on one local PC (Not recommended)**

This is essentially the same installation as the network installation above except both the Workstation and Network components are installed on the same machine so that all data and software resides on a single local machine. In general, the software will install itself with the defaults appropriate for most installations. The only options available to you are where to place the workstation and data components. The default is C:\IRSReporterNW\IRXyy for the data and C:\IRSReporterWS\IRXyy for the workstation. However, if company policy or standards require a different location, you may place either component anywhere you wish, for instance, C:\Program Files\IRXyy and C:\ApplicationData\IRXyy for the workstation and network components respectively. Just select the path when prompted.

## **Performance and the IRXPath.cfg file**

You have control over the location of the help files and the placement of temporary files used for sorting, indexing, etc. These locations may be changed from within the Reporter, but, if you have multiple workstations, you may want to set up one IRXPath.cfg file located in the \IRXyy folder on the network. The workstations will automatically pick up the changes the next time the IRS Reporter is started on each machine. The defaults keep both temp and help files in the IRXyy folder on the local workstation (data, of course, is always on the network). The help files must reside on the local machine (a Microsoft requirement, not ours), but may be in any location you desire on that machine. It's sometimes desirable to have the temp files located with the data on the network (for security purposes, for instance), but this comes with a performance penalty – both for the user and for the network.

The IRXPath.cfg file is located in the IRXyy folder on the workstation and can be edited with Notepad or can be modified from within the IRS Reporter using the “Path” option from the “Files” menu. There are 3 entries in this file. Here are a couple of examples:

```
DataPath=\\servername\sharename\IRX08\  
HelpPath=Default  
TEMP=Default
```

```
DataPath=R:\Reporter\IRX08\ ‘A mapped network location  
HelpPath=c:\windows\help\ ‘If you have a standard location  
TEMP=c:\irx08\temp ‘This is the actual default
```

These path values were established during the installation based on choices you made at that time and should be changed with caution. You may change the location of the Help (HelpPath=), but, if you do, you must copy the Help files from their current location to the new one. Temp files (TEMP=) may be changed to any location you want for holding temporary files. The "DataPath=" parm should not normally need to be changed. It is designed primarily for use with the Network component and can create severe problems if modified or used incorrectly.

As mentioned above, there can be significant impact on your network if the temp directory is located on a network drive since most utility and reporting functions require sorting and indexing of the data files. There are a substantial number of intermediate files created and, if on the network, the data must travel each way two or more times. It makes more sense to create (and delete) those files on the workstation which minimizes network traffic.

The TEMP= parm has three possible values:

- 1) "Default" uses the IRS Reporter's default temp directory of IRXyy\temp on the workstation.
- 2) "System" which looks in the system environment parms on the local PC to see if an IRSTEMP, TEMP, or TMP parm has been set to point to a local temp directory and uses that if it's there. Otherwise, it reverts to "Default".
- 3) An actual path such as "C:\IRXyy\Temp", "C:\TEMP", or "C:\Windows\Temp". The first is a good choice and is the default.

The HelpPath= parm must be either “Default” (the IRXyy folder on the workstation) or have a valid path to the actual location of the help files. If you modify this parm, you must copy the help files from the IRXyy folder to this location. Just keep in mind that Microsoft now requires (beginning with Vista) that the help files reside on the local workstation for “security” reasons.

## Security

The IRS Reporter has internal security that controls users and functions. However, it cannot control external security (access to the data and other files via non-Reporter avenues). You can control that access by setting permissions as you would any other application. Just be aware that various types of Reporter users require different kinds of access and all require fairly high level access. The Reporter Administrator (a Reporter internal function, not a network or IT administrator) will usually have "full control" in the IRXyy and all sub-directories. The "normal" user doesn't quite need full control, but needs everything else: Modify, Read & Execute, List Folder Contents, Read, Write. In other words, the average user will: execute the program; modify, create and delete files. The following tables will give some idea as to what levels are required in each folder for each of the Reporter's 3 user types, if you want to go to this level. These tables assume the Reporter Administrator does NOT perform the installation. If the Administrator does the install, then Full Control is necessary in the IRXyy folder and all sub-folders.

Please note: DSD normally issues several updates during the year. These updates are critical to the functioning of the IRS Reporter. If they are applied by the user of the software (the normal situation), the user must be a "Power User" on the local machine.

### **Security Levels On the Network Share:**

	<u>Administrator</u>	<u>User</u>	<u>Browser</u>
IRXyy	M, R, W	R, E	R
Archive	R, W	R, W	None
IRXDAT	M	M	R
IRXTCC	M	M	R
Forms	R	R	R
Formats	R, W	M	R
Profiles	R, W	R, W	R, W
Temp	M	M	M

Note: The network administrator (or installer) may have to perform some IRS Reporter functions for any user who does not have Full Control.

### **Security Levels On the Workstation:**

	<u>Administrator</u>	<u>User</u>	<u>Browser</u>
IRXyy	R, E	R, E	R, E
Temp	M	M	M