

FISCAL YEAR 2017–18 PRINCIPAL APPORTIONMENT DATA COLLECTION AND TAX SOFTWARE

VERSION 17.00

INSTALLATION GUIDE

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Introduction

This document is the Installation Guide for the California Department of Education (CDE) Principal Apportionment software, and it covers installation of the data collection and tax software packages. Understanding basic Windows functions and procedures, such as clicking, double clicking, right clicking, etc., will assist you in installing and using the software.

This Installation Guide is designed to be common to the Tax Software and the Principal Apportionment Data Collection (PADC) Software. The steps involved with installing the two separate packages are the same, with the exception of the self-extracting executable download and install files. For example, the Tax Software begins with tax2017vxxxx.exe file, and the PADC Software begins with the padc2017vxxxx.exe file.

Note: If you install the PADC Software package, it is not necessary to separately install the Tax Software package. County offices of education should install the PADC Software package. However, because First Principal taxes are due to CDE before the release of the PADC Software, some county offices may choose to install the Tax Software package as well. County auditors should install the Tax software package. School districts and charter schools should install the PADC Software package to submit attendance and other data to their county office of education.

For instructions on using the software packages, please refer to the user guides and/or the reporting instructions which can be found on the CDE Software & Forms Web page at http://www.cde.ca.gov/fg/sf/. Select the appropriate software package and fiscal year.

System Requirements

The installation of the Principal Apportionment Software requires approximately 10–40 MB of hard disk space on a Windows based PC.

Document Conventions

This document uses the following conventions to describe functions and procedures in the software:

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Window Names	The names of windows, screens, and dialogue boxes use title case, such as: Save As window User Information screen
Commands	Commands are operations you must follow in order to perform certain functions in the software. Bold face font is used, such as: Select Print from the File menu Click the OK button
Image Names	Images, or pictures, are described as Figures and use Italic face font, such as: <i>Figure 1: Diagram of the data process.</i>
Important Notes	Notes include important statements regarding steps you may need to take. They are highlighted in gray, with a black border on the top and bottom, such as:
	Note: Important note here

This section describes software installation in Windows from the Internet.

Downloading and Installing the Software from the Internet

The latest versions of the software are available on the CDE Software & Forms Web page at <u>http://www.cde.ca.gov/fg/sf/</u>.

Note: Depending on the browser used, the downloading instructions may be different than described below.

Downloading from Internet Explorer

- 1. Navigate to the CDE Software & Forms Web page at http://www.cde.ca.gov/fg/sf/.
- 2. Select either Tax Collection or Principal Apportionment Data Collection.
- 3. Select the Fiscal Year.
- 4. Click on the tax2017vxxxx.exe or padc2017vxxxx.exe file.

Note: To download the PADC Software click on the appropriate links, then the padc2017vxxxx.exe file, respectively. The various setup windows and dialog boxes will be specific to the software you are installing.

- 5. A dialog box will display asking if you want to run or save the file.
- 6. If you want to run the file, select **Run** and the installation process will begin.
- 7. If you want to save the file, select **Save** to save the file to the default folder or select **Save As** to save the file to a specific folder. (For example, you might save your file to the Desktop so you may quickly find it.)

Note: Be sure you have closed all other applications.

Installing the Software

1. Locate the downloaded file (ex. tax2017vxxxx.exe or padc2017xxxx.exe) and double-click on it to start the installation process.

2. The InstallShield Wizard window displays (Figure 1).

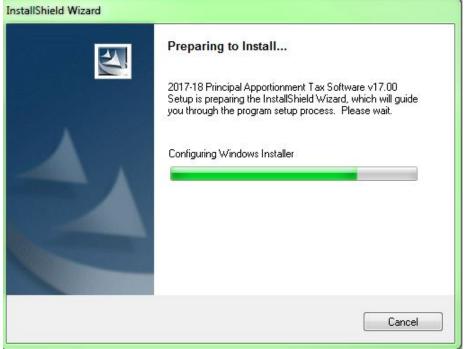


Figure 1: InstallShield Wizard Window

3. The Windows Installer window displays (Figure 2).

InstallShield Wizard	
Z	Preparing to Install
	2017-18 Principal Apportionment Tax Software v17.00 Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.
	Extracting: 2017-18 Principal Apportionment Tax Software
	Cancel

Figure 2: Windows Installer Window

4. The Welcome window displays (Figure 3).

E	Welcome to the 2017-18 Principal Apportionment Tax Software v17.00 installation
	2017-18 Principal Apportionment Tax Software v17.00 Setup is preparing the InstallShield Wizard which will guide you through the program setup process. Please wait.
	Computing space requirements
	< Back Next > Cancel

Figure 3: Welcome Window

5. Click the Next button. The Customer Information window displays (Figure 4).

Customer Information		
Please enter your information.		
User Name:		
cde		
Organization:		
California Department of Education	n	
Install this application for:		
	his computer (all users)	
Anyone who uses the second		
Anyone who uses the second		

Figure 4: Customer Information Window

6. Click the Next button. The Destination Folder Program window displays (Figure 5).

	tion Folder xt to install to this folder, or click Change to install to a different folder.
	Install 2017-18 Principal Apportionment Tax Software v17.00 to: C:\Program Files (x86)\Tax Software\2017-18\v17.00\ Change
stallShield -	

Figure 5: Destination Folder Program Window

Note: Accept the default location for the Destination Folder.

7. Click the **Next** button. The Database Folder Program window displays (Figure 6).

Note: Accept the default location for the Database Folder.

Database Click Nex	e Folder xt to install to this folder, or click Change to install to a different folder.	
	Install 2017-18 Principal Apportionment Tax Software v17.00 database to: C:\Program Files (x86)\Tax Software\2017-18\v17.00\Data\ Change	
stallShield -		

Figure 6: Database Folder Program Window

8. Click the Next button. The Ready to Install the Program window displays (Figure 7).

eady to Install the Program		C d
The wizard is ready to begin inst	allation.	
If you want to review or change exit the wizard.	any of your installation settings, click Back. Click Can	icel to
Current Settings:		
Setup Type:		
Typical		
Destination Folder:		
C:\Program Files (x86)\Tax \$	Software\2017-18\v17.00\	
User Information:		
Name: cde		
Company: California Depart	ment of Education	
IIShield		
	< Back Install C	ancel

Figure 7: Install Program Window

9. Click **Install.** The progress meter displays the installation status (Figure 8).

	2017-18 Principal Apportionment Tax Software v17.00 gram features you selected are being installed.
P	Please wait while the InstallShield Wizard installs 2017-18 Principal Apportionment Tax Software v17.00. This may take several minutes.
	Status:
	Writing system registry values
stallShield -	
	< Back Next > Cancel

Figure 8: Installation Progress Window

10. When the installation is complete, the Installation Completed window displays (Figure 9).

The dialog box shows that	the software installed successfully.
2017-18 Principal Apportio	nment Tax Software v17.00 - InstallShield Wizard
	Installation Completed
	The 2017-18 Principal Apportionment Tax Software v17.00 has successfully been installed. Click Finish to exit the wizard.
	< Back Finish Cancel

Figure 9: Installation Completed Successfully Window

11. Click Finish.

Note: You may be asked to restart your computer. Click **Yes**. After the computer restarts, you can start using the software.

Setting Compatibility Mode

After installing the Principal Apportionment Data Collection Software or Tax Software, right click on the shortcut on your desktop to set the compatibility mode to Windows XP (Service Pack 3) as shown in Figure 10. If you are using Windows XP your system should already be set to Windows XP. However, if you are using Windows 7, Windows 8, or Windows 10 we strongly recommend you run the software in this mode to alleviate errors caused by compatibility issues between Windows 7, Windows 8, or Windows 10, and the software.

Security	Details	Previous Versions
General	Shortcut	Compatibility
n earlier version o atches that earlie lelp me choose	f Windows, select the r version. <u>the settings</u>	nd it worked correctly on compatibility mode that
Compatibility mod	e	
🔲 Run this pro	gram in compatibility m	ode for:
Windows XP (Service Pack 3)	-
Settings		
Run in 256	colors	
Run in 640	480 screen resolution	1
🔲 Disable visu	al themes	
🔲 Disable desl	ctop composition	
🔲 Disable disp	lay scaling on high DF	PI settings
Privilege Level		
- All star	gram as an administrat	tor
â a		
Change sett	ings for all users	

Figure 10: Compatibility Mode Window