



**FISCAL YEAR 2017-18  
PRINCIPAL APPORTIONMENT  
DATA COLLECTION AND TAX SOFTWARE  
VERSION 17.00**

## **INSTALLATION GUIDE**

**October 2017**

**California Department of Education  
School Fiscal Services Division  
1430 N Street  
Sacramento, CA 95814**

# Table of Contents

---

<b>Introduction</b> .....	<b>1</b>
System Requirements.....	1
Document Conventions.....	1
<b>Software Installation</b> .....	<b>3</b>
Downloading and Installing the Software from the Internet.....	3
Downloading from Internet Explorer.....	3
Installing the Software.....	3
Setting Compatibility Mode.....	9

# Table of Figures

---

Figure 1: InstallShield Wizard Window.....	4
Figure 2: Windows Installer Window.....	4
Figure 3: Welcome Window.....	5
Figure 4: Customer Information Window.....	5
Figure 5: Destination Folder Program Window.....	6
Figure 6: Database Folder Program Window.....	6
Figure 7: Install Program Window.....	7
Figure 8: Installation Progress Window.....	7
Figure 9: Installation Completed Successfully Window.....	8
Figure 10: Compatibility Mode Window.....	9

# 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/fq/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:

# Introduction

## 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:  
*Figure 1: Diagram of the data process.*

## 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

# Software Installation

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 <http://www.cde.ca.gov/fg/sf/>.

**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 PADDC 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.

# Software Installation

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

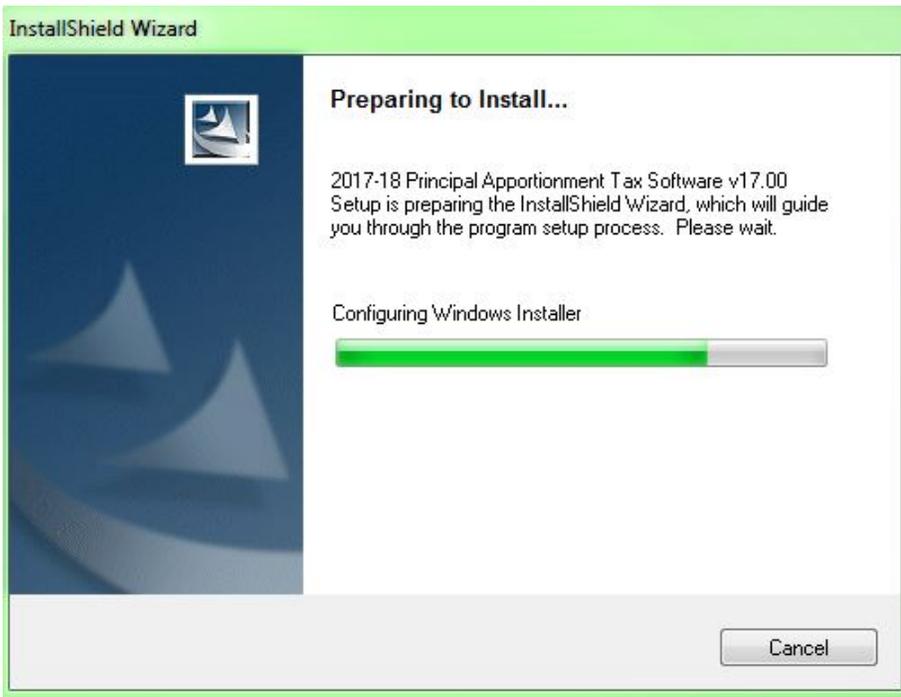


Figure 1: InstallShield Wizard Window

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

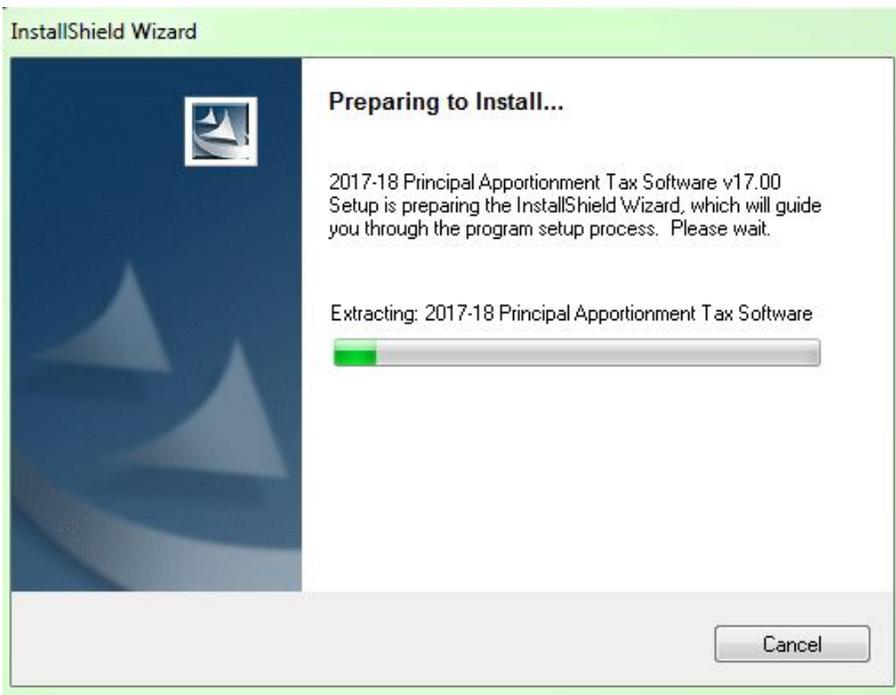


Figure 2: Windows Installer Window

# Software Installation

4. The Welcome window displays (Figure 3).



Figure 3: Welcome Window

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

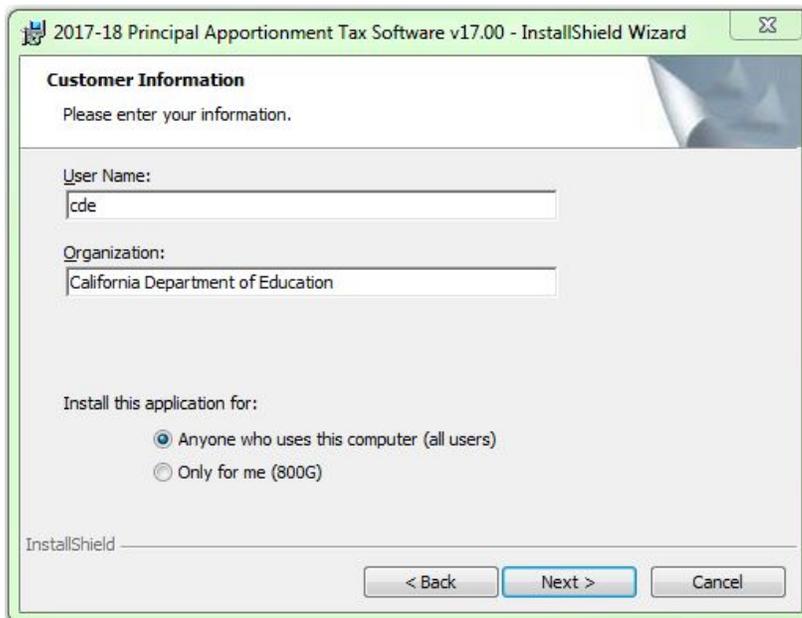


Figure 4: Customer Information Window

# Software Installation

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

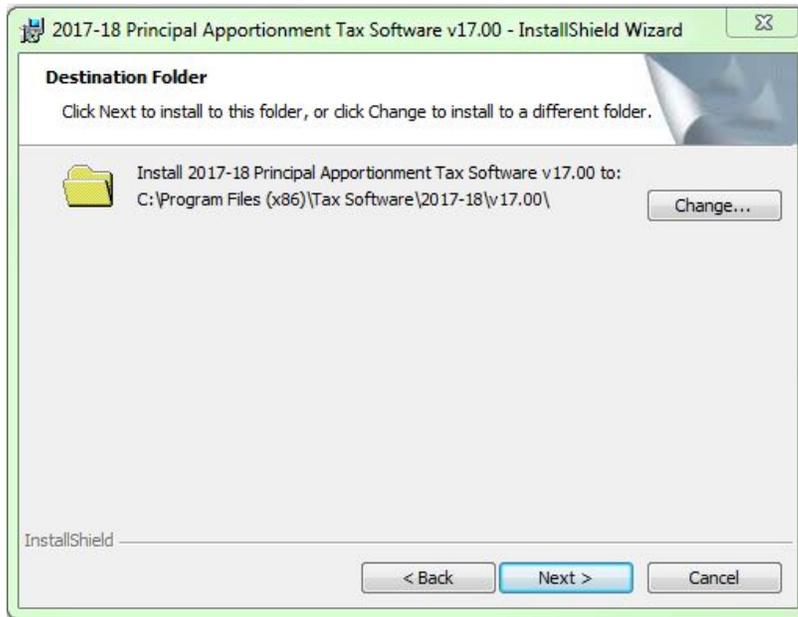


Figure 5: Destination Folder Program Window

**Note:** Accept the default location for the Destination Folder.

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

**Note:** Accept the default location for the Database Folder.

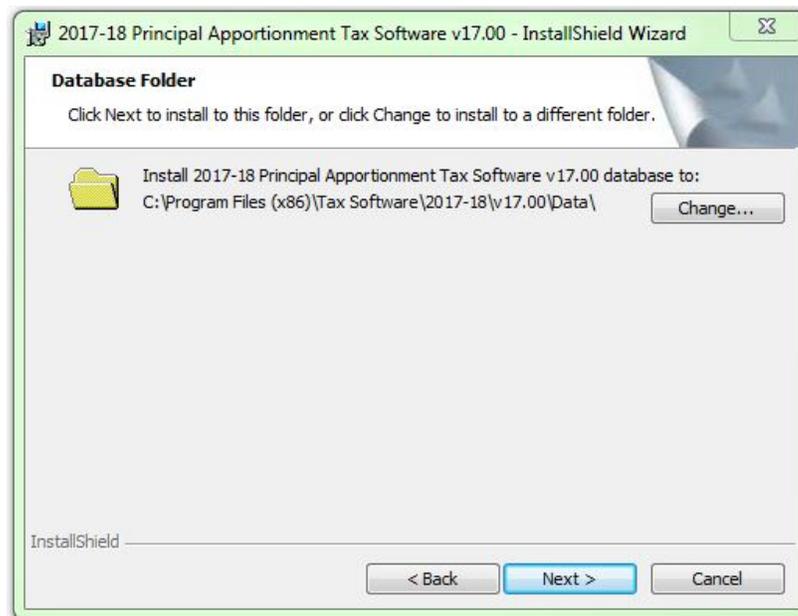


Figure 6: Database Folder Program Window

# Software Installation

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



Figure 7: Install Program Window

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



Figure 8: Installation Progress Window

## Software Installation

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

The dialog box shows that the software installed successfully.

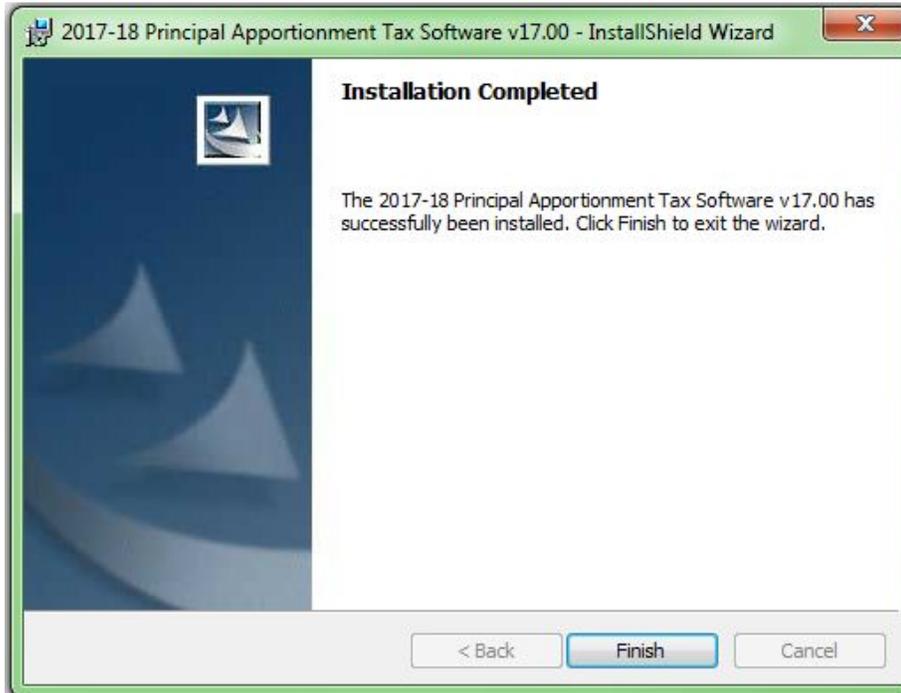


Figure 9: Installation Completed Successfully Window

11. Click **Finish**.

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

# Software Installation

## 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.

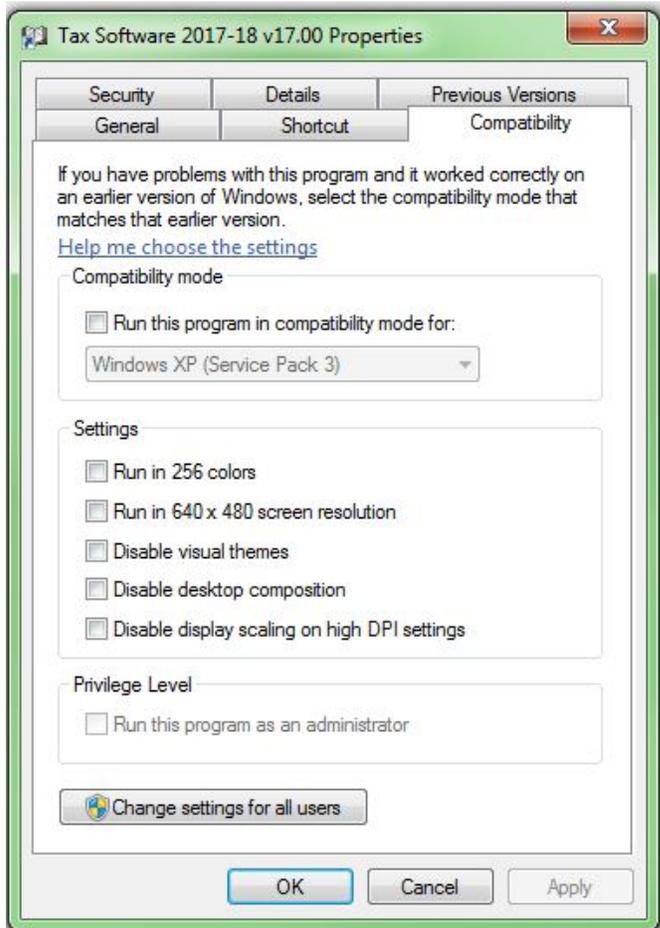


Figure 10: Compatibility Mode Window