

PTP Tax Expense

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**PTP Tax Expense**” link on the Software Downloads webpage
- Select the “**PTP Tax Expense Installation**” link and follow the installation wizard
- After the installation open the program and enter your registration details
- Existing users transfer forward standing data

Detailed guide

Please note: The installation will differ depending on whether PTP Tax Expense has been installed on the workstation before. The following notes have therefore been split into All Users, Existing PTP Tax Expense users and New PTP Tax Expense users as appropriate.



Important note: You must have administrative access rights to install PTP Tax Expense. If you do not have the necessary access rights you will need to seek assistance from your own IT support.

All users

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

PTP Tax Expense is supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **PTP Tax Expense**. Then select the “**PTP Tax Expense Installation**” link.

New PTP Tax Expense users

The Installation Wizard guides you through the process to make it as easy as possible, there are however some points to note. The Installation Wizard will ask you for the destination folder in which to install the program and then a database folder for the database files. We strongly recommend that you install both of these to the default location. (If you are installing the network level software please see the notes below).

Please note: Depending on which files your system already contains, Microsoft Windows may require you to re-boot.

After installing, Please register your software from one workstation.

Existing PTP Tax Expense users

Following on from the All users section above, The new software will install in the same way as the previous updates/service packs. After installing, you **MUST** open PTP Tax Expense, this will update the system. You will only need to install the software on one workstation in a network and the new software will then automatically update each workstation as the user runs PTP Tax Expense. After installing, please register your software from one workstation.

Please note: Each user in a network installation must have administrative access rights on the machine for the installation to complete successfully.

Registration

To start PTP Tax Expense click **Start, All Programs, PTP Software, and PTP Tax Expense** (alternatively you could use the desktop shortcut). If you are a new user a trial version window will be displayed, click **Register Now** and enter the details from your Registration Document. If you are an existing user click the Spanner Icon, select the registration tab and enter the details from your Registration Document.



Important note: It is important that you keep the registration document.

Transferring earlier year's data

Once you have successfully installed and registered your program, you can transfer forward your earlier year's data. To do this, click the **Spanner** icon in the main toolbar, this will display a Roll Over Data to 2009/2010 window. This option will roll over data for **ALL** companies and therefore need only be run once.

Installing on a network: New user (Existing users see above)

Quick guide

- The program needs to be installed on each workstation
- The database files need to be installed to a shared area on the server
- The program needs to be registered on one workstation

Detailed guide

PTP Tax Expense works on both Peer to Peer and dedicated file server networks. Whatever system is in use all users must have permanent **READ** and **WRITE** access to the folder that will contain the data files. When running the Installation Wizard, you will be asked for the destination folder in which to install the program. We recommend that this be left as the default as the program should be on the local drive of each workstation.

You will then be asked for the path to the database folder for the database files. Enter the path to the folder on the server where you wish the database files to be located. We would recommend **F:\PTPData** where F is the drive letter assigned to the server.

If you are running a Peer to Peer network you will need to map a drive letter (F in our example) to **\\Example\C\Program Files\PTP** (assuming the database files have been installed to the default location on the acting server)*. Here, **Example** is the name of the computer on the network acting as a server. The path to the database folder from the client workstations would then be **F:\PTPData**.

The path to the database folder must always end in PTPData as the installation adds the necessary subfolder(s) to this, and it is here that the database files are installed. Once the program has been installed on the master machine, you must follow the instructions in the registration section above.

You will need to install the program on each workstation within a network system however you only need to register the software from one workstation.

***Microsoft Windows VISTA and Windows 7: Please note:** when installing the PTP Tax Expense on to a Vista or Windows 7 machine or peer to peer network (where the server is a Vista or Windows 7 machine) the default program and data locations will be C:\PTP as the program location and C:\PTP\PTPDATA as the data location. This is down to Microsoft's Virtualisation system and increased security surrounding "**Program Files**".