

# Tax-Aide Appointment System

## Installation and Configuration Manual

December 17, 2018

Version 4.03

This appointment system (referred to in this document as TAAS) was developed by AARP Foundation Tax-Aide volunteers from Colorado to replace paper or spreadsheet type systems. It provides a convenient platform for managing appointments for individual sites, coordination of scheduling across multiple sites, or a central scheduling point for many sites. New sites and users can be added by any Appointment Manager and users can be assigned either viewing or scheduling permissions at their own or multiple sites as desired. Sites can optionally allow internet access to taxpayers for scheduling their own appointments or add themselves to a callback list for subsequent scheduling.

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# Introduction

## Overview

The software for the Appointment system is delivered in a zip file containing numerous PHP executable files (.php, .css), image files (.png, .gif, .ico) and supporting documents (.pdf).

This is a web application, not a desktop application. These files must be installed on a web server. The Appointment system has been successfully deployed on Windows, Linux, and MacOS servers.

Access to the Appointment system is via a public-facing web page.

## Prerequisites

TAAS requires these components to work

- MySQL database – version 4.6 or later
- PHP – version 5.0 or later
- An HTTP web server, e.g. IIS or Apache.

If you do not have all these already installed on your server, please refer to Appendix 1.

## Windows or Linux Installation

### Step 1: Create a folder

Create a new folder to hold the Appointment system files. If you are using a website creation system (like Wordpress, Joomla or Drupal), you want the folder to be outside of that environment. It's usually best to add the new directory immediately above your website root folder to keep the access link simple, for example:

`https://mywebsite.net/myappts`

For IIS installations, it's OK to create your folder below the default:

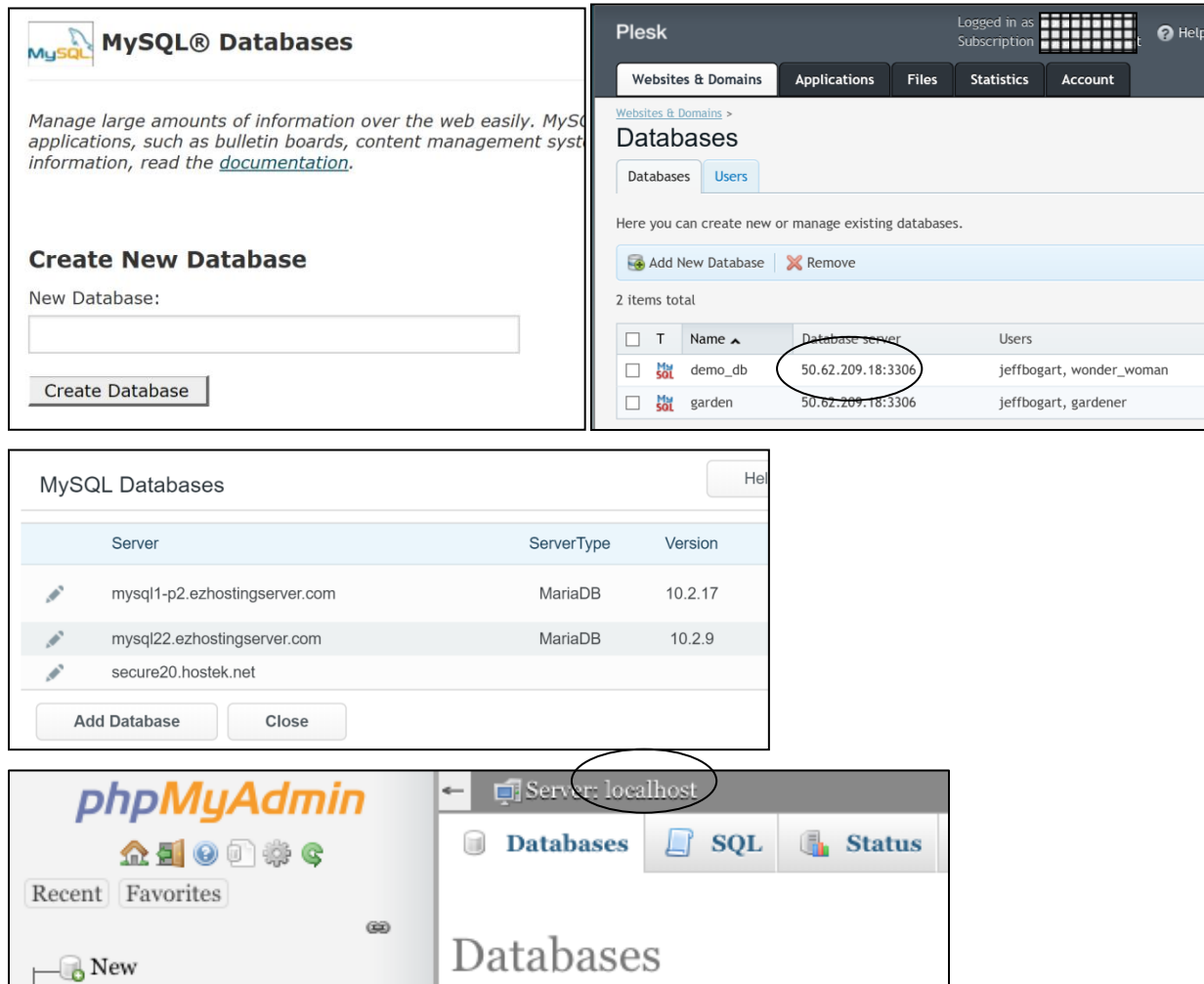
`C:\inetpub\wwwroot`

After you create your folder:

- Enable full permissions to this folder for your web server app and for yourself.
- Unzip and copy the files into the new folder

## Step 2: Create a database

The Appointment System uses a MySQL database interface. Creation of the database varies with the host server, but may look like one of the following:



**Important** - Record the host name of your database (an IP address or "localhost"). You'll need that information later.

### Step 3. Create a database user name and password.

The image displays two screenshots of web interfaces used for creating a database user.

**Left Screenshot: MySQL Users - Add New User**

- Username:** gardener
- Password:** [masked]
- Password (Again):** [masked]
- Strength:** Very Strong (100/100)
- Create User:** [button]
- Add User To Database:**
  - User:** gardener
  - Database:** garden
  - Add:** [button]

**Right Screenshot: Plesk - Adding Database User**

- Database:** Any
- Type:** MySQL
- Database server:** 50.62.209.18:3306 (default for MySQL)
- Database user name:** newusername
- New password:** [masked] (Strength: Strong)
- Confirm password:** [masked]
- Required fields:** [OK] [Cancel]

Be sure your new user has full access privileges to the database, typically the default. If you already have a user name set up for other databases, you could use that same user here of course.

## Step 4: Setup

To initialize the system, invoke index.php from your browser:

<http://localhost/apptsys/index.php>

The page below will display. You will need to enter:

- Database host name (recorded from step 2 above).
- The database name, user name and password.
- Your personal information – name, phone, email, home site name.  
(your initial password will be "admin").

### Information about your database:

Host:  (Could be an IP address if other than "localhost")

Database Name:

Username:

Password:

Time Zone: ☐ Eastern ☐ Central ☒ Mountain ☐ Mountain no DST  
☐ Pacific ☐ Alaska ☐ Hawaii ☐ Hawaii no DST

### Information about you:

First Name:

Last Name:

Email:

Phone:  (7 or 10 digits with optional leading 1)

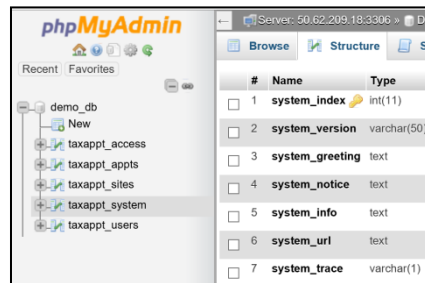
Your Home Site Name:

Your public website URL:  × (Optional)

The setup program will create new subfolders in your appointment folder:

- Images - all .png and .jpg files will be moved to this directory.
- appt\_session\_dir - where global session variables are stored.  
(overrides the PHP system session location setting if it exists)
- appt\_error\_log – a text file where error messages may appear.

The setup program will also create the database tables and their fields:



The screenshot shows the phpMyAdmin interface. On the left, a tree view shows the database 'demo\_db' with several tables: 'taxappt\_access', 'taxappt\_appts', 'taxappt\_sites', 'taxappt\_system', and 'taxappt\_users'. The 'taxappt\_system' table is selected, and its structure is displayed on the right. The table has 7 fields:

#	Name	Type
1	system_index	int(11)
2	system_version	varchar(50)
3	system_greeting	text
4	system_notice	text
5	system_info	text
6	system_url	text
7	system_trace	varchar(1)

In addition to entries in the `taxappt_system` table, there should be one entry in the `taxappt_users` table (you) and two entries in the `taxappt_sites` table (your site and an “Unassigned” site).

The setup program will also create a new PHP file, `opendb.php`. This file uses the information you entered to provide the needed code statements to connect the database to the Appointment system.

If you need to run setup again for some reason, simply delete the `opendb.php` file and it will be re-created. Re-running setup will not change the contents of the database other than to add new tables or table fields during an update process. But it will set your password back to “admin”.

## Step 5: Configuration

If setup runs properly, you will then be presented with the login page:

### Tax-Aide Appointments

We are not accepting reservations at this time.

Appointments at other sites are by phone – see the [AARP Locator web site](#).



WELCOME

#### Sign In

Email:

Password:

☐ Remember me on this PC.

**FORGOT YOUR PASSWORD?**

[Click here](#)


Don't have an ID yet? . . . . .

Sign Up


Sign Up

**AARP reservations are now closed for this year.**

**Please come back when we re-open next January.**




**Make or Change appointments**




**Manage options and permissions**


**Change your information:**




**Password**



**Email**



**Phone**



Sign in with your email and initial password (“admin”). You should change that password as soon as possible.

Then, choose “Manage options and permissions”. It will take you to your home site configuration tab.

## Site and User Administration

You are signed in as Jeff Bogart

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[Manage appointments](#)
[Tools](#)
[Sign out](#)

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**Site being managed:** Apple Valley Senior Center

System Options
Site Options
Schedulers
Taxpayers

Current site name:

Address:

City:  State:  Zip:

Contact:

Appointment phone:  Email:

Website:

Email message: ☐ Send confirmation email if taxpayer has an email.

Site options: ☐ Allow scheduling of reserved slots in Summary View (empty slots are always chosen first)

Internet access: ☐ Allow internet taxpayers to make their own appointment.

Other site access: ☐ Allow other sites to view or schedule your taxpayers.

[SITENAME]

[ADDRESS]

[CITY] [STATE] [ZIP]

[CONTACT]

[PHONE] [EMAIL]

[WEBSITE]

The message can contain any of the shortcodes listed above as well as the following:

[TPNAME] (Taxpayer's name(s))

[DATE] [TIME] (Appointment date & time)

[STATESITE] (State website)

Complete filling out the information and options for your home site. More details about the options are in the *Appointment help.pdf* document, included as one of the TAAS files.



## The Site Options Tab:

As the System Administrator, you have a tab for System Options that others do not. Here, you can customize the Login Greeting and the Login Notice. They both use HTML coding for the messages. To restore the default Login Greeting, simply delete the entire greeting and select *Save changes* (buttons will appear at the bottom of the screen). To remove the Login Notice, delete the notice and it will not appear on the login screen. The notice will have no effect on the ability to use the system but acts only as a deterrent to warn internet clients that the system is not active for their use.

The State Website should point to a web page that is accessible to the public such as lists of what to bring. The [STATESITE] shortcode in appointment confirmation messages will be replaced by what you enter in that field.

The screenshot displays the 'Site and User Administration' interface. At the top, it says 'You are signed in as Jeff Bogart'. Below this is a navigation bar with 'Manage appointments', 'Tools', and 'Sign out'. The main content area has four tabs: 'System Options', 'Site Options' (which is selected), 'Schedulers', and 'Taxpayers'. Under the 'Site Options' tab, the 'Current Version: 4.02' is shown. The 'Login Greeting' section contains a text area with HTML-coded text about AARP Foundation Tax-Aide. To the right of this text area is a list of HTML formatting tips. Below the text area is a 'Login Notice' section with a red background containing text about closed reservations. At the bottom right, there is a 'State Web Site [STATESITE]:' field with the URL 'http://cotaxaide.org' and a 'GO' button.

**Site and User Administration**  
You are signed in as Jeff Bogart

Manage appointments Tools Sign out

**System Options Site Options Schedulers Taxpayers**

**Current Version: 4.02**

**Login Greeting**

AARP Foundation Tax-Aide, an AARP Foundation program, helps low- to moderate-income taxpayers have more discretionary income for everyday essentials, such as food and housing, by assisting with tax services and ensuring they receive applicable tax credits and deductions.

**Login Notice:**

AARP reservations are now closed for this year.  
Please come back when we re-open next January.

**State Web Site [STATESITE]:**  
http://cotaxaide.org GO

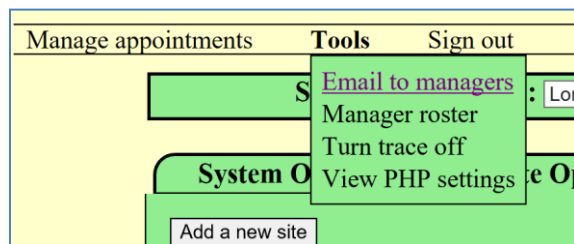
Also, as System Administrator, you have full access to all sites and all users and can change all permissions including adding additional System Administrators (it's a good idea to have a backup). This can be helpful when the Appointment Managers at sites need assistance in configuring their setups.

You also have access to a site called "Unassigned". The purpose of this site is to list users (in the Taxpayer tab) who have login accounts but are not associated with any site. Perhaps a person created a login ID but never made an appointment. You may wish to purge names on this list if they haven't been used for a long time.

That's it! You are now ready to add additional sites and their Appointment Managers, Schedulers and appointment slots for each site. For those tasks, see the *Appointment help.pdf* file included in the TAAS distribution files.

## The Tools Menu:

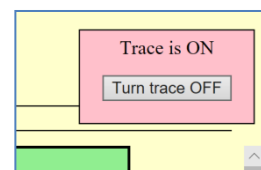
The tools menu is only available to the Administrator.



**Email to managers** opens your email application on your PC and pre-loads the send-to list with all Administrators and Appointment Managers.

**Manager roster** produces a new window listing all Administrators and Appointment Managers in the system with their email address, phone number and home site name. This can be copied and pasted into an excel spreadsheet.

**Turn trace off/on** provides messages in the `appt_error_log` as an aid to troubleshooting. When the trace is active, a red indicator box at the top right of the window indicates this status. Turn the trace off by clicking the button in the red box or the Tools menu choice.



**View PHP settings** provides a new window showing all settings for PHP and its extensions as an aide to troubleshooting. This invokes the `show_phpinfo.php` file, which can also be run directly as a URL, for example:

[https://mywebsite.net/myappts/show\\_phpinfo.php](https://mywebsite.net/myappts/show_phpinfo.php)

## MacOS Installation

### Step 1: Create a folder

Create a new folder to hold the Appointment system files. It's fine to use the default MacOS Apache folder:

`/Users/<username>/Sites`

After you create your folder:

- Enable full permissions to this folder for your web server app and for yourself.
- Unzip and copy the files into the new folder

Then follow Steps 2 through 5 in the Windows Installation section.

## Troubleshooting tips

### Reporting problems

To ask questions or to report problems, please send an email to: [jeff@bogarhome.net](mailto:jeff@bogarhome.net).

### Check the PHP version and extensions

On your server dashboard there will be a place to select the version of PHP that is being used. The icon may be something like:



The application has been tested on several PHP versions and it's best to use the latest (7.2 as of this writing) since the later versions have significant performance improvements.

If, during setup, the database doesn't get created, verify that *mysqli* is included in the extensions.

Current PHP version: **7.2**

PHP Version: 7.2 Set as current Switch To PHP Options

<input type="checkbox"/> apcu	<input type="checkbox"/> igbinary	<input type="checkbox"/> nd_pdo_mysql	<input checked="" type="checkbox"/> posix	<input type="checkbox"/> uploadprogress
<input checked="" type="checkbox"/> bcmath	<input checked="" type="checkbox"/> imagick	<input checked="" type="checkbox"/> oauth	<input type="checkbox"/> propo	<input type="checkbox"/> uuid
<input type="checkbox"/> brotli	<input type="checkbox"/> imap	<input checked="" type="checkbox"/> oci8	<input type="checkbox"/> pspell	<input type="checkbox"/> vips
<input type="checkbox"/> dba	<input type="checkbox"/> inotify	<input checked="" type="checkbox"/> odbc	<input type="checkbox"/> raphf	<input type="checkbox"/> wddx
<input type="checkbox"/> dbase	<input type="checkbox"/> interbase	<input type="checkbox"/> opcache	<input type="checkbox"/> redis	<input type="checkbox"/> xdebug
<input type="checkbox"/> disval	<input type="checkbox"/> intl	<input checked="" type="checkbox"/> pdo	<input checked="" type="checkbox"/> snmp	<input type="checkbox"/> xmlreader
<input type="checkbox"/> dom	<input checked="" type="checkbox"/> ioncube_loader	<input type="checkbox"/> pdo_dblib	<input type="checkbox"/> soap	<input checked="" type="checkbox"/> xmlrpc
<input type="checkbox"/> eio	<input type="checkbox"/> json	<input checked="" type="checkbox"/> pdo_firebird	<input type="checkbox"/> sockets	<input checked="" type="checkbox"/> xmlwriter
<input type="checkbox"/> enchant	<input type="checkbox"/> ldap	<input checked="" type="checkbox"/> pdo_mysql	<input checked="" type="checkbox"/> sqlsrv	<input type="checkbox"/> xsl
<input type="checkbox"/> ffmpeg	<input type="checkbox"/> lz4	<input type="checkbox"/> pdo_oci	<input type="checkbox"/> ssh2	<input type="checkbox"/> yaf
<input type="checkbox"/> fileinfo	<input checked="" type="checkbox"/> mailparse	<input type="checkbox"/> pdo_odbc	<input type="checkbox"/> stats	<input type="checkbox"/> yaml
<input type="checkbox"/> gd	<input checked="" type="checkbox"/> mbstring	<input checked="" type="checkbox"/> pdo_pgsql	<input type="checkbox"/> sysvmsg	<input type="checkbox"/> zip
<input type="checkbox"/> gender	<input type="checkbox"/> memcached	<input checked="" type="checkbox"/> pdo_sqlite	<input checked="" type="checkbox"/> sysvsem	<input type="checkbox"/> zmq
<input type="checkbox"/> geoip	<input type="checkbox"/> mongodb	<input type="checkbox"/> pdo_sqlsrv	<input type="checkbox"/> sysvshm	
<input type="checkbox"/> gmagick	<input type="checkbox"/> mysqli	<input checked="" type="checkbox"/> pgsql	<input type="checkbox"/> tidy	
<input type="checkbox"/> gnupg	<input type="checkbox"/> mysqlind	<input checked="" type="checkbox"/> phalcon3	<input type="checkbox"/> timezonedb	
<input type="checkbox"/> http	<input type="checkbox"/> nd_mysqli	<input type="checkbox"/> phar	<input checked="" type="checkbox"/> trader	

Save Use Defaults

### The Trace tool

From the Tools menu option, you can turn trace on or off.

This produces messages in the *appt\_error\_log* file whenever an action is taken and is helpful when the action does not do what was expected – especially if a real error is logged as a result of that action. If such occurs, please report it so that it can be investigated and repaired. Send the trace file along plus any other information that you think might be helpful.

With trace on, the *appt\_error\_log* can get rather large as time goes on. After using this tool for troubleshooting, it's a good idea to erase the *appt\_error\_log*. It will be recreated when needed.

## Environment settings

The *environment.php* module is designed to set the required PHP options and create the necessary subfolders.

You may gain some insight by running the *show\_phpinfo.php* module as a URL:

[https://mywebsite.net/myappts/show\\_phpinfo.php](https://mywebsite.net/myappts/show_phpinfo.php)

If you have difficulty with the installation or operation and find a setting that is causing problems, please report it. The default settings on servers vary. We'll be glad to help you get set up if you run into trouble.

## Appendix 1 - Prerequisite Components

### Windows Prerequisites

Assuming you want to use IIS as your web server, we highly recommend that you use Microsoft Web Platform Installer. It provides a robust system to install and configure many well-known web components. It works well for installing MySQL and PHP.

<https://www.microsoft.com/web/downloads/platform.aspx>

### MacOS Prerequisites

Apache and PHP come pre-installed on MacOS. There are numerous articles available to assist you with configuring these components.

<https://coolestguidesontheplanet.com/install-apache-mysql-php-on-macos-mojave-10-14/>

<https://www.iodocs.com/installing-apache-php-mysql-mac-os-x-macos-sierra/>

### MySQL

If you're not already using MySQL, we recommend the Community Server edition.

<https://dev.mysql.com/downloads/>

If you install version 8.0 or greater of MySQL, we recommend you choose the Legacy Encryption option to ensure compatibility with third party tools.

### Also Recommended

One of the best free database management tools for MySQL is phpMyAdmin. It is well supported and very powerful for a wide range of DBA tasks.

<https://www.phpmyadmin.net/>

## Appendix 2 – Database Schema

Table	Field	Option	Description
taxappt_system	system_index	1	Only one record in this table
	system_version	(number)	Version number in setup.php file
	system_greeting	(text)	Login page greeting message
	system_notice	(text)	Login page notice (doesn't print if blank)
	system_info		Reserved for future use
	system_url		URL to state web site
	system_trace	T	"T" if trace is active
taxappt_sites	site_index	(number)	Index of the record for the site (1 = Unassigned)
	site_name	(text)	Site name
	site_address	(text)	Address, phone, contact with " " as a delimiter
	site_inet	S R C	Internet scheduling allowed Restrict scheduling to CB list if CB list > avail slots Restrict scheduling to CB list
	site_contact	(text)	Contact person
	site_message	(text)	Email message to be sent when appt is made or changed. Not sent if first 4 characters are "NONE".
	site_addedby	(index)	Index of site that created this site
	site_open	(date)	Date site is open for internet scheduling
	site_closed	(date)	Last date site is open for internet scheduling
	site_schedule		Reserved for future use
	site_help	(URL)	
	site_sumres	"checked"	Allow selection of RESERVED slot from Summary View
taxappt_users	user_index	(number)	Index of the record for this user
	user_name	(text)	Abbreviated name for status history messages
	user_email	(email)	User's email address
	user_phone	(phone)	User's phone number
	user_last	(text)	User's last name
	user_first	(text)	User's first name
	user_home	(index)	Index of user's home site (Appt Mgrs, Schedulers only)
	user_appt_site	(index)	Index of user's last appointment site (Inet scheds only)
	user_options	A M 1-15	Administrator Appointment Manager Bit map value of Scheduler permissions: 1 = view Callback list 2 = add/change Callback list 4 = view Appointment availability (Summary View) 8 = add/change Appointments
	user_lastlogin	(timestamp)	Date and time of last login
	user_sitelist	(indexes)	Indexes of sites to which the user has permissions
taxappt_access	acc_index	(index)	Index of the permission entry in the table
	acc_owner	(index)	Index of the site who has given this permission
	acc_location	(index)	Index of site to whom the owner wishes to give permissions (i.e. who is listed on the Scheduler tab)
	acc_user	(index)	Index of the user to whom the owner gave permissions
	acc_option	M, 1-15	The permission option (see above table)
taxappt_appts	appt_no	(index)	Index of the appointment slot
	appt_date	(date)	Slot date (0000-00-00 is unused, Callback or Deleted)
	appt_time	(time)	Slot time (00:00:00 is unused, Callback or Deleted)
	appt_name	(text)	Client's name
	appt_location	(index)	Index of the site for which the appointment is made

Table	Field	Option	Description
	appt_phone	(phone)	Client's phone number
	appt_need	(text)	Client's need information
	appt_status	(text)	Status history – each event separated by “%%”
	appt_wait	(number)	A number, used for Callback list sorting
	appt_change	(timestamp)	When the appointment was last added or changed
	appt_by	(text)	Full name of the person who made the appointment
	appt_type	D	Deleted record
	appt_tracking		Reserved for future use

### Acknowledgements:

Many thanks to the following who have provided significant assistance in creating this application:

Barry Berlin (CO1)  
 Bill Peterson (KS1)  
 Hans Jahns (ME1)  
 Joanne Barnard (CO1)  
 Joanne Barnard (CO1)  
 Maggie Barrington (CO1)  
 Mark Love (ME1)  
 Steve Anderson (KS1)