

BEST PRACTICE CHECKLIST

Installation, Implementation and Training for PPC's SMART Practice Aids

Thank you for ordering PPC's SMART Practice Aids! The following checklist will help you get started. Please read this entire document before proceeding with installation and product use. Underlined links will direct you to more detailed information. All documentation and up-to-date product support information is available from our Customer Help Center at support.checkpoint.thomsonreuters.com.

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Prior to Installation

- Review the complete [system requirements](#) and ensure that the computers you will be installing to meet the minimum requirements.
- Users performing the installation process must have the Tools products assigned to their Checkpoint user ID in the Checkpoint User Administration System. For information on assigning users, check with the Site Administrator for your firm, or click [here](#) for instructions.
- If you did not receive an email with your Checkpoint user IDs and instructions on how to access Checkpoint, you can submit an online request at support.checkpoint.thomsonreuters.com.
- PPC's SMART Practice Aids and Checkpoint Tools are updated periodically. You must ensure that all users in your firm update, as needed. To assist you, we send an email notification to your firm's Site Administrator whenever a product update is released. To receive the email notification, the Site Administrator must have the Tools products assigned to his or her Checkpoint user ID in the Checkpoint User Administration System.
- When you are ready to begin installation, log in to [Checkpoint](#) and then from the Tools tab, select the PPC Install/Update link. Then click the Install/Update button.

Installing PPC's SMART Practice Aids

You have several options for the installation process and location of the application and the database:

[PPC's SMART Practice Aids End User Installation Guide – Local Machine Only](#)

[Install to Local Machines](#) - This is the easiest option, with the application and data residing on a local machine.

[PPC's SMART Practice Aids Detailed Installation Guide – All Options](#)

- Administrative Install – Recommended for experienced network administrators, this type of installation creates a server image to a specified network location for deployment to multiple machines, with the SMART application and Microsoft SQL 2008 R2 Express local database.
- Shared Database Installation – By installing a shared database to a server on the network, you can share client engagements more efficiently and allow multi-user access to client engagements on a network location instead of to a local machine.
- Install on Terminal Services or on a Citrix server – Recommended only for experienced network administrators managing a Citrix environment.
- Install on Microsoft SQL Workgroup server – Recommended only for experienced network administrators managing a Microsoft SQL Workgroup or higher versions.

[Best Practices for Using Checkpoint Tools and SMART Practice Aids in Virtual Office CS](#)

- Virtual Office CS or Software as a Service (SaaS) – Licensed Virtual Office CS users can access their licensed Checkpoint Tools and PPC's SMART Practice Aids products without having to download and install to a local workstation. For assistance with Virtual Office CS, Software as a Service (SaaS), or Engagement CS, please call **800.968.0600**.

Product Support

If you have any questions about installing PPC's SMART Practice Aids or Checkpoint Tools, please contact Thomson Reuters Technical Support Department at **800.431.9025**, option **4**.

If you have any questions about using PPC's SMART Practice Aids or Checkpoint Tools, please contact Thomson Reuters Product Usage Department at **800.431.9025**, option **3**.

Thank you for your continued use of PPC products from Thomson Reuters.

Customer Help Center

You'll discover the following online documentation for PPC's SMART Practice Aids at support.checkpoint.thomsonreuters.com.

Quick Reference Cards

- [SMART Practice Aids – Risk Assessment – Quick Reference Card](#)
- [SMART Practice Aids – Field Work – Quick Reference Card](#)
- [SMART Practice Aids – Disclosure – Quick Reference Card](#)
- [SMART Practice Aids – Internal Control – Quick Reference Card](#)
- [SMART Practice Aids – Compilation and Review – Quick Reference Card](#)
- [SMART Practice Aids – Audit Essential – Quick Reference Card](#)
- [SMART Practice Aids - Single Audit Suite – Quick Reference Card](#)
- [Checkpoint Tools for PPC – Quick Reference Card](#)

Best Practices for All Users

- [PPC's SMART Practice Aids: Common Questions and Answers](#)
- [PPC's SMART Practice Aids: Best Practices – Back Up, Restore, and Delete Engagements](#)
- [PPC's SMART Practice Aids: Best Practices - Working Remotely](#)
- [News & Updates – What's New Documentation](#)

User Guides

- [SMART Practice Aids User Guide](#)
- [SMART Practice Aids – Single Audit User Guide for Periods ending prior to 12/25/2015](#)
- [Checkpoint Tools for PPC User Guide](#)

Customer Help Center: Engagement Software Users

Best Practices for Thomson Reuters' Engagement Software Users

- [SMART Audit Suite with Workpapers CS](#)
- [SMART Audit Suite with Engagement CS](#)
- [SMART Audit Suite with Advance Flow Quick Reference Card](#)

Best Practices for Virtual Office CS Users

- [Checkpoint Tools and SMART Practice Aids in Virtual Office CS](#)

Best Practices for ProSystem fx Engagement Users

- [Checkpoint Tools for PPC and SMART Practice Aids: Best Practices - ProSystem fx](#)
- [Using SMART Practice Aids – Field Work with ProSystem fx](#)

Best Practices for Caseware Users

- [Checkpoint Tools For PPC & SMART Practice Aids Best Practices with Caseware User Guides](#)

Product Training

Product functionality training for SMART Practice Aids and Checkpoint Tools for PPC is FREE. Take this efficient learning to ensure a more successful implementation for you and your staff.

Learning paths are meant to guide you to the most relevant training for your subscription/product purchases.

- [PPC SMART Practice Aids Learning Path](#)
- [Checkpoint Tools for PPC Learning Path](#)
- [All PPC's SMART Practice Aids Training](#)

Product Training for Engagement CS

Product functionality training is also available for Engagement CS, part of the CS Professional Suite from Thomson Reuters. For efficient learning and to ensure a more successful implementation for you and your staff, register at <http://cs.thomsonreuters.com/training/CourseList.aspx>.

Engagement CS-Integration with PPC and RIA (On Demand Recorded Session)

The objective of this course is to familiarize you with the integration between Engagement CS, PPC, and RIA. Topics include PPC products that integrate with Engagement CS, how to use PPC's Practice Aids as engagement templates, working with the Engagement CS and PPC Add-ins, and using Engagement CS, PPC, and RIA Checkpoint to achieve paperless workflow. No advance preparation is required to take this class. Course Objectives: Inserting PPC Checkpoint Tools workpapers and checklists into your Engagement CS tree, customizing and building audit planning and checklists, and using PPC research hyperlinks to take you directly to additional research materials and content.

Engagement CS Setup Essentials 1 (3 CPE credits)

This class is designed for users who are responsible for planning and setting up engagements in the current year and for readying engagements to roll forward in the next year. The class provides an overview of the engagement processes such as administrative tasks, working in the engagement workspace, working with PPC's Checkpoint Tools and SMART Practice Aids, plus other static and dynamic workpapers. It also includes rolling the engagement forward to the next period. A prerequisite for taking this class is a working knowledge of the Trial Balance CS module. No advance preparation is required to take this class, however. Course Objectives: setting up security with groups and group privileges, creating customized sign-off types, establishing correct engagement properties, integrating with PPC's SMART Practice Aids and Checkpoint Tools, and rolling the engagement forward into the next period.

Custom Training and Consulting for Engagement CS

If you are looking for training or advice tailored specifically for your firm, [Custom Training](#) and [Consulting](#) is also available for Engagement CS. For more information, contact Sales at **800.968.8900**.

Audit Efficiency Training from AuditWatch

AuditWatch is part of the Tax & Accounting business of Thomson Reuters and is a uniquely specialized training and consulting firm dedicated to helping audit professionals provide unparalleled service and value to their clients.

For more information on customized audit training, view our website:

http://www.auditwatch.com/consulting/audit_process.asp

View course offerings for the PPC Core Training Series with SMART Practice Aids:

http://www.auditwatch.com/training/PPC_Core.asp