



# BEST PRACTICE CHECKLIST FOR INSTALLATION, IMPLEMENTATION, AND TRAINING FOR CHECKPOINT TOOLS FOR PPC

Thank you for ordering **Checkpoint Tools for PPC!** This includes PPC's Practice Aids, PPC's Workpapers, PPC's Interactive Disclosure Checklist and PPC's Engagement Letter Generator.

**If you are using PPC's SMART Practice Aids, please refer to our separate [Best Practice Checklist](#) for that product, instead of this document.**

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 on our Customer Help Center at [support.checkpoint.thomsonreuters.com](http://support.checkpoint.thomsonreuters.com)

## 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 refer to the instructions at [support.checkpoint.thomsonreuters.com](http://support.checkpoint.thomsonreuters.com)
- If you did not receive an e-mail with your Checkpoint user IDs and instructions on how to access Checkpoint, you can submit an online request at [support.checkpoint.thomsonreuters.com](http://support.checkpoint.thomsonreuters.com)
- Checkpoint Tools are updated periodically. You must ensure that all users in your firm update as needed. To assist you, we send an e-mail notification to your firm's Site Administrator whenever a product update is released. To receive the e-mail 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 CHECKPOINT TOOLS FOR PPC:

You have several options for the installation process:

### [Checkpoint Tools for PPC Local Workstation - Installation Instructions](#)

- **Install to Local Machine** - This is the easiest option to install one or more Checkpoint Tools products to a local machine.

### [Checkpoint Tools for PPC - Network Installation Instructions](#)

- **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.
- **Install on Terminal Services or on a Citrix server** - Recommended only for experienced network administrators managing a Citrix environment. This product must be installed directly onto the Terminal Services or Citrix server. Installing remotely to servers is not supported. The Terminal Services server or Citrix server must have Microsoft Office installed.

### [Best Practices for Using Checkpoint Tools in Virtual Office CS:](#)

- **Virtual Office CS or Software as a Service (SaaS)** - Licensed Virtual Office CS users can access their licensed Checkpoint Tools 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.

## CHECK OUT OUR CUSTOMER HELP CENTER

You'll discover the following online documentation for Checkpoint Tools for PPC at [support.checkpoint.thomsonreuters.com](https://support.checkpoint.thomsonreuters.com)

### Quick Reference Cards

- [Checkpoint Tools for PPC – Quick Reference Card](#)

### Best Practices for Engagement CS and Virtual Office CS Users

- [Integrating Checkpoint Tools for PPC with Engagement CS](#)
- [Using Checkpoint Tools in Virtual Office CS](#)

### Best Practices for ProSystem fx Engagement Users

- [Checkpoint Tools for PPC and SMART Practice Aids: Best Practices - ProSystem fx](#)

### Best Practices for Caseware Users

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

### User Guides

- [Checkpoint Tools for PPC Training Manual](#)

## PRODUCT TRAINING FOR CHECKPOINT TOOLS FOR PPC & SMART PRACTICE AIDS

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.

- [Checkpoint Tools for PPC Learning Path](#)
- [PPC SMART Practice Aids 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**.