



PPC INSTALLATION INSTRUCTIONS – LOCAL WORKSTATION

Administrator Rights

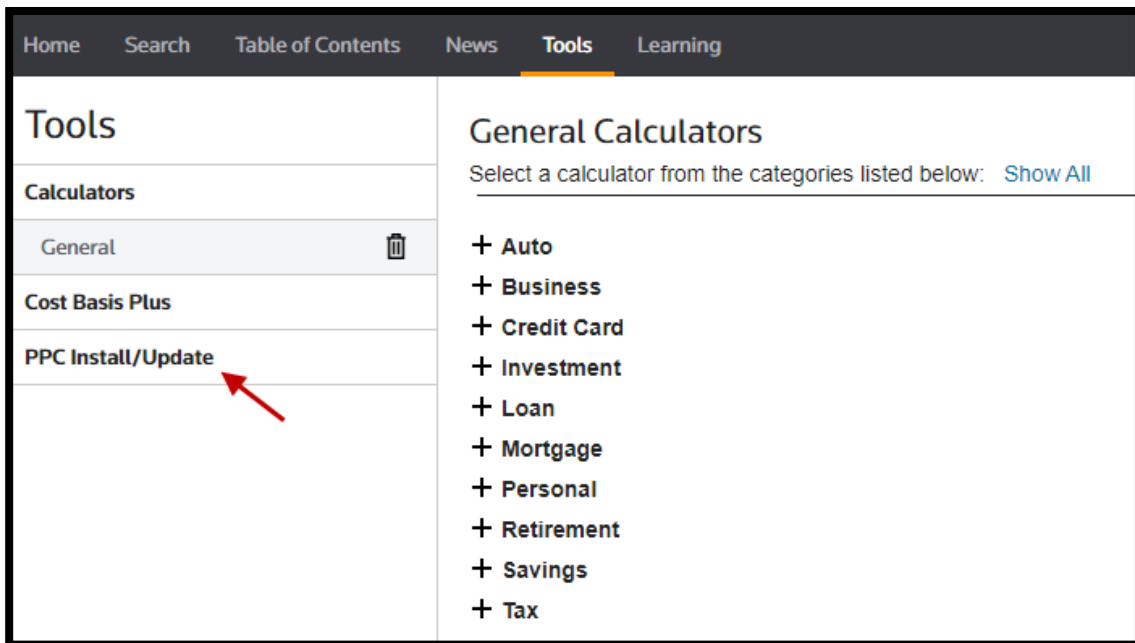
Administrator rights **for the computer you will be installing to** are required for installation.

Before starting the installation process, ensure that the computer you will be installing to meets the [minimum system requirements](#) for the products you intend to install.

LOCAL MACHINE INSTALLATION

Install One Or More Products At A Time From The Internet

1. Close all open programs, including Microsoft Office or any virus detection program.
2. Login to Checkpoint: <http://checkpoint.thomsonreuters.com>
3. From **Tools** tab on Checkpoint, select **PPC Install/Update**



4. Click the **Install/Update** button to display the Installation Instructions dialog screen:

PPC Install/Update

Get the industry standard PPC process and workflow that you trust, powered by tools you already know how to use: Microsoft® Word and Excel.

Checkpoint Tools include:

- PPC's Practice Aids™ - Editable Word and Excel versions of all of the practice aids in the related PPC Guide - about 100+ documents for each title.
- PPC's SMART Practice Aids® - Innovative suite of products designed with the audit and accounting professional's workflow in mind by bringing advanced functionality to your licensed Practice Aid products. Automate significant audit processes using modules for Risk Assessment, Internal Control, Disclosure, IFRS Disclosure, Single Audit and Field Work to optimize auditor judgments, increase audit effectiveness, and increase consistency across audit engagements. Also fully integrated for Compilation and Review engagements.
- PPC's Workpapers™ - Additional workpapers not available in the PPC Guides. The Excel-based templates have advanced diagnostics, dynamically changing content, and more automation.
- PPC's Interactive Disclosure Libraries™ - Excel versions of PPC's popular Disclosure Checklists, linked to Word-based examples for each required disclosure. Hundreds of example disclosures to choose from enable you to find just the right one.
- PPC's Engagement Letter Generator™ - A Word-based application that covers all the common audit, attest, compilation, review, tax, and consulting engagements in a single product. Automated tools help you quickly tailor the letters to your engagement and format them for printing.

Each product works with leading paperless engagement software or with Word and Excel alone, and links to the PPC guidance you already have!

For training on Checkpoint Tools products, [click here](#). Our customer training program offers classes that teach you how to use the software with maximum proficiency and at all levels of expertise. Our training services provide several courses in a variety of delivery methods to help you maximize your software investment.

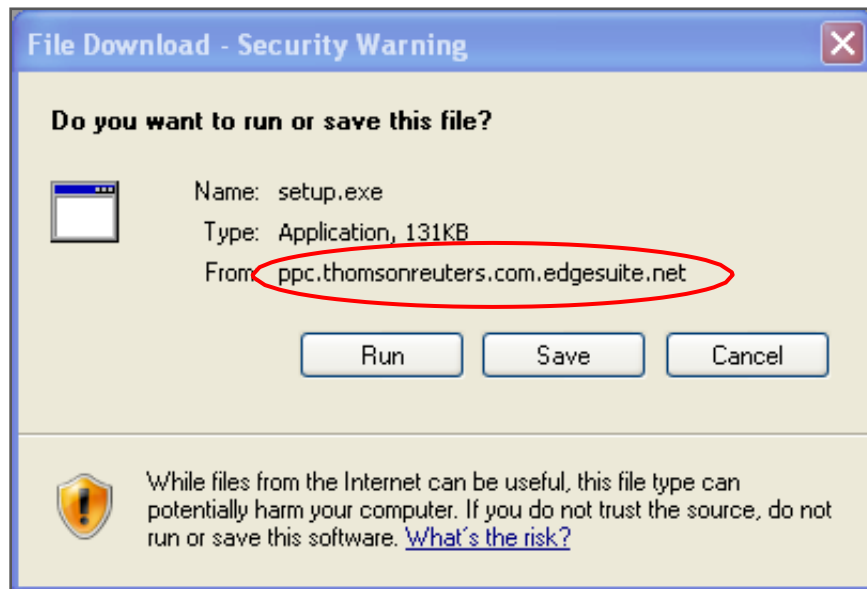
[Learn more](#) OR [Install/Update](#)

During Installation, only your licensed Checkpoint Tools will be listed. To purchase additional Checkpoint Tools, call 1-800-431-9025.
[System Requirements](#) | [Technical Support](#)

5. Click **PRODUCT INSTALLER** on Installation Instructions screen



6. Click **Run/Yes** on the **File Download – Security Warning** dialog screen.



Note: You may need to add **ppc.thomsonreuters.com.edgesuite.net** as a trusted site.

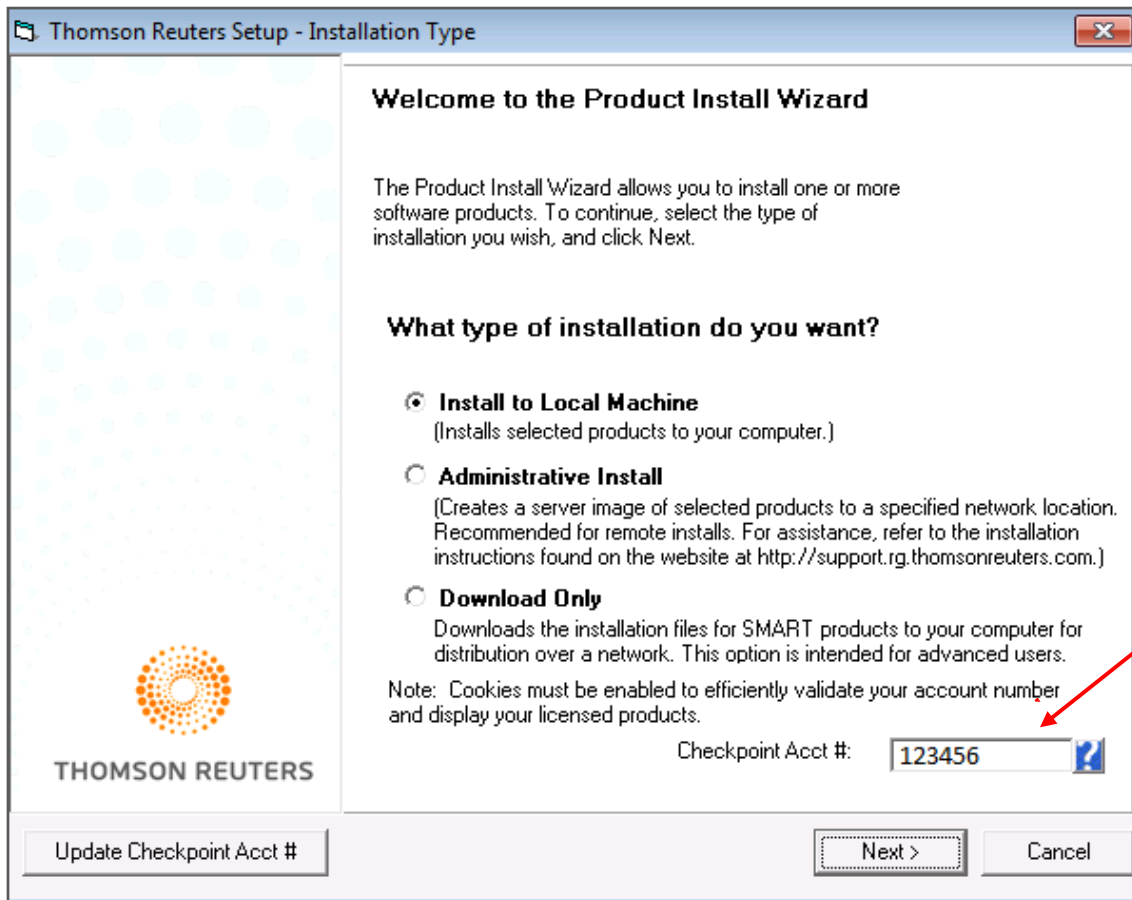
7. Verify that **Thomson Reuters (Tax & Accounting) Services Inc.** appears next to Publisher on the Internet Explorer - Security Warning dialog screen and click **Run**.



- On the **Welcome** screen, your Checkpoint Account Number (Checkpoint Acct #:) is displayed (by default). Make sure this Checkpoint account number matches with Checkpoint User ID in step 5.

If Checkpoint Acct # and Checkpoint User ID does not match you can copy paste checkpoint User ID into Checkpoint Acct #.

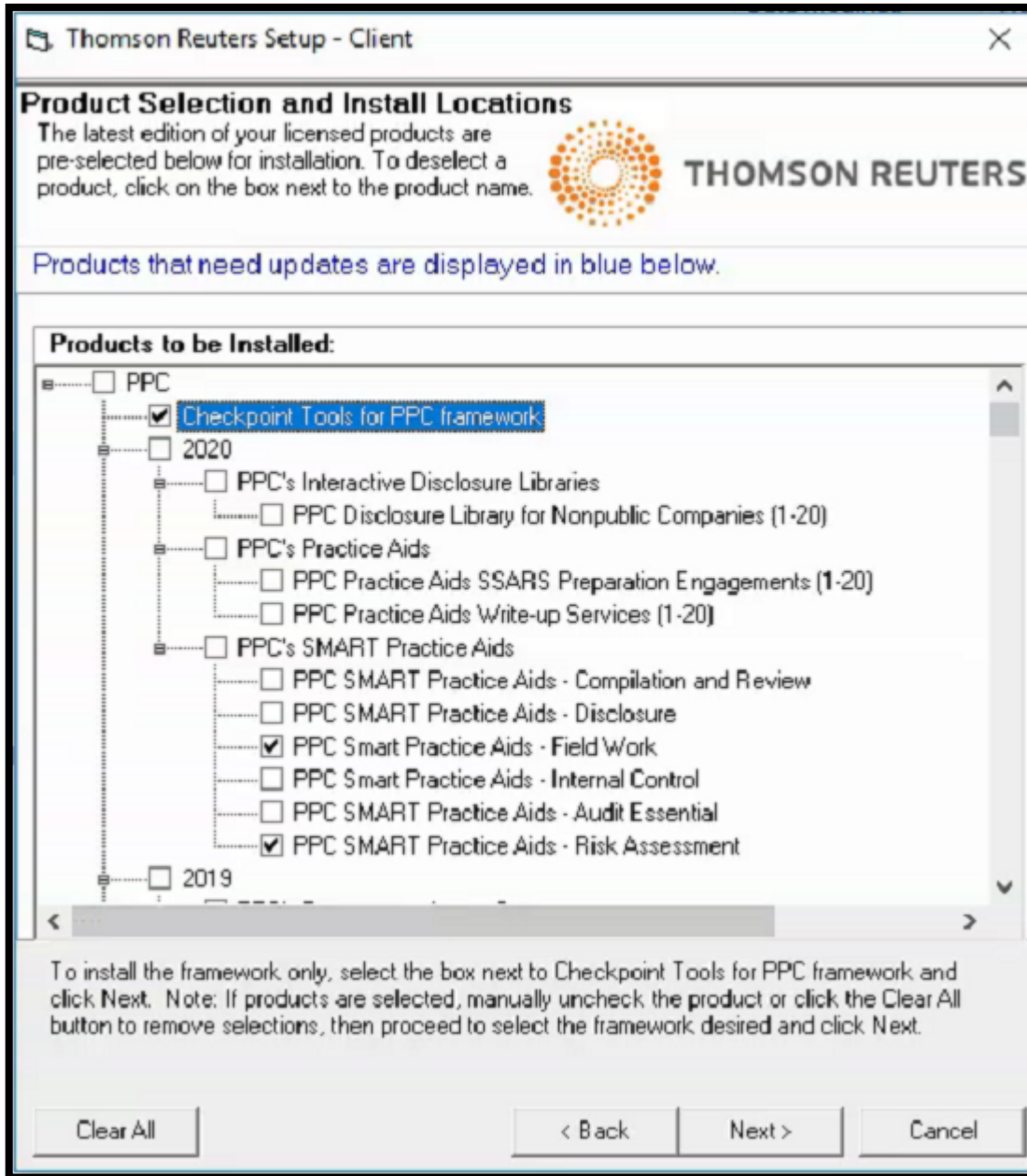
You can also click 'Update Checkpoint Acct #' button on left hand side.



- Select the **Install to Local Machine** installation type. For Administrative Install details, see the separate instructions for [Network Computer Installation](#).

- Click **Next**.

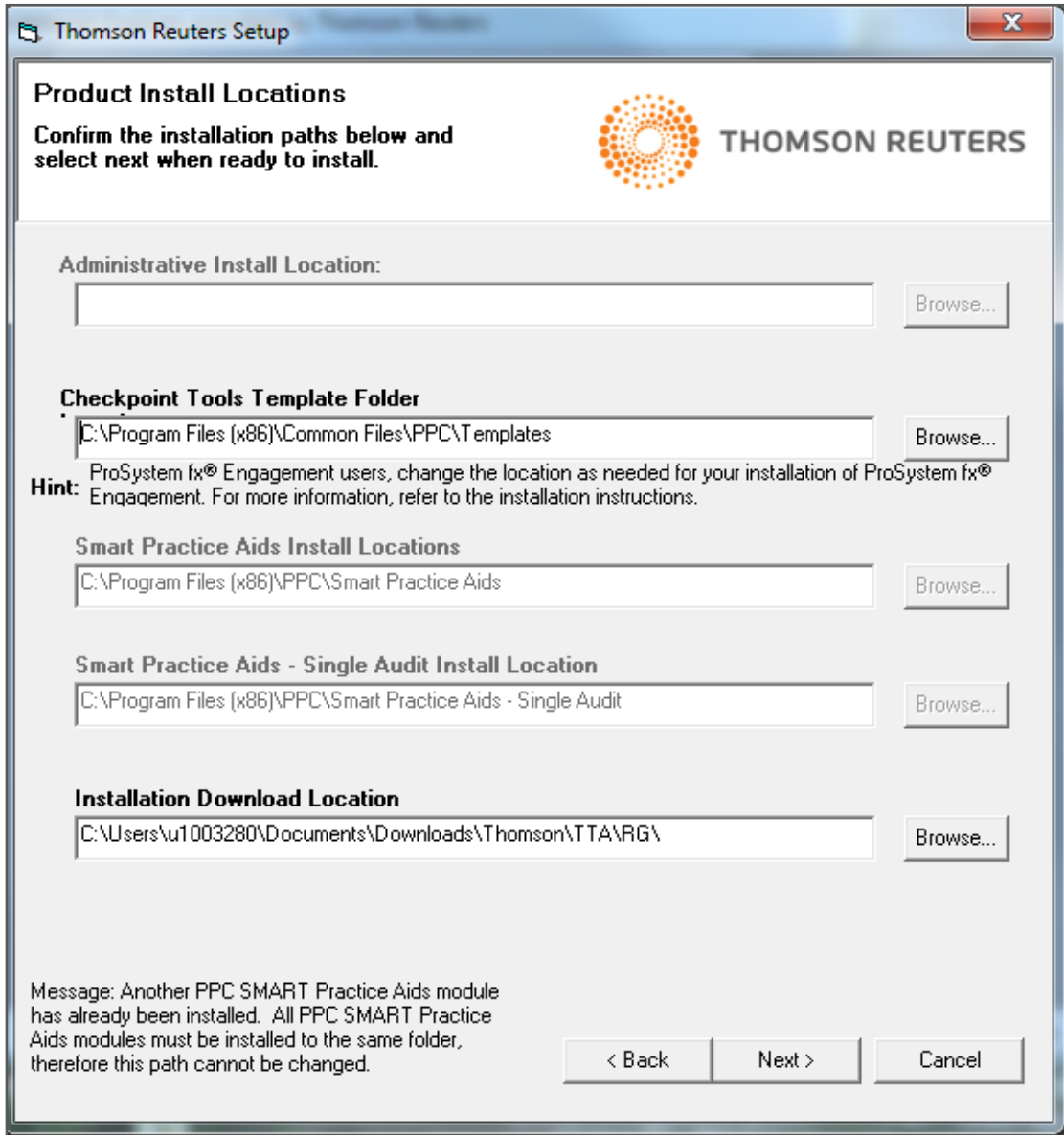
11. You will see the products that your ID number is currently licensed for on the **TTA Setup – Client** screen. (For products that are already installed, the check box will be unchecked.)



12. Check the products you want to install and click **Next**.

Note: You have the option to select one or more products for your installation.

13. Check to see that the applicable install locations are set appropriately.

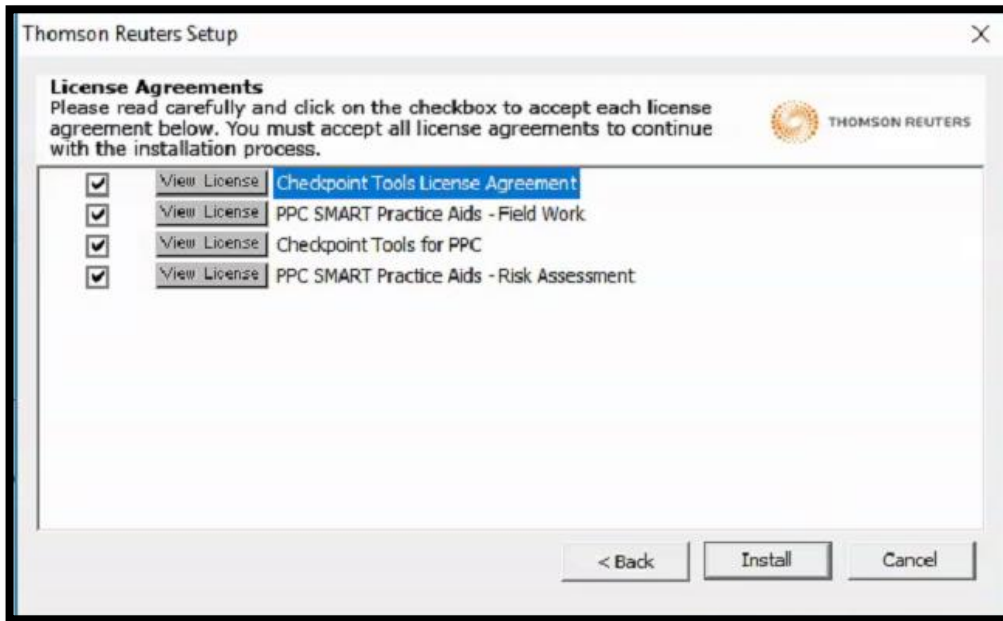


Default locations are provided for Checkpoint tools templates, including SMART Practice Aids. If you need to change the Template Folder Location or the SMART Practice Aids Install location, select the **Browse** button and select a new drive or folder, or type a different path.

Hint: If you are using **ProSystem fx Engagement**, be sure to change the template location for your installation of ProSystem fx Engagement.

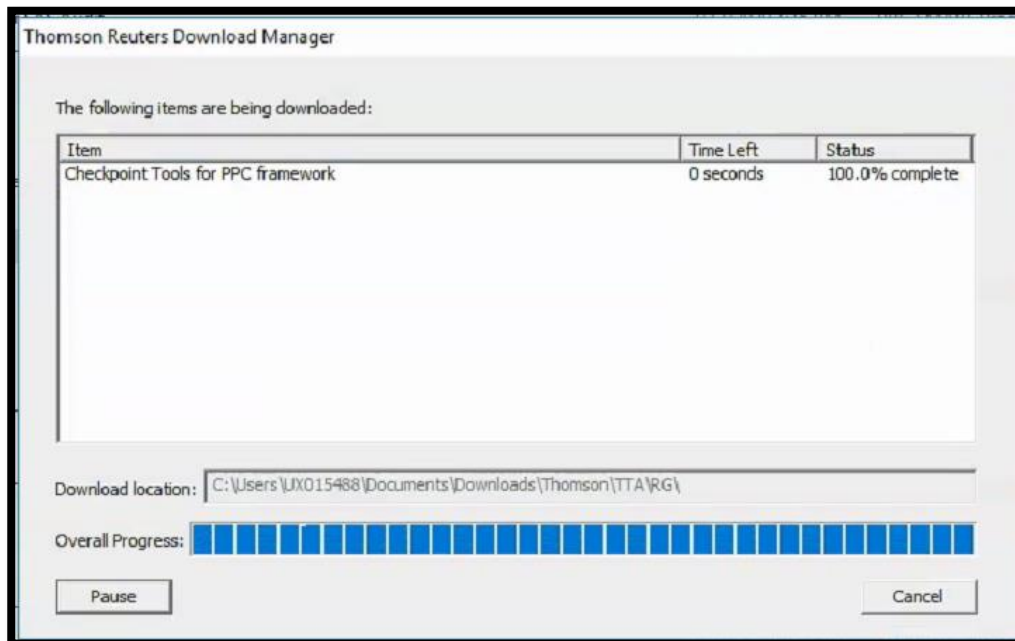
14. After setting your product install location, click **Next**.

15. Read and accept the License Agreements for the selected products by clicking the check box next to each license listed. After you have accepted all license agreements, click the **Install** button to continue the installation of the selected products.



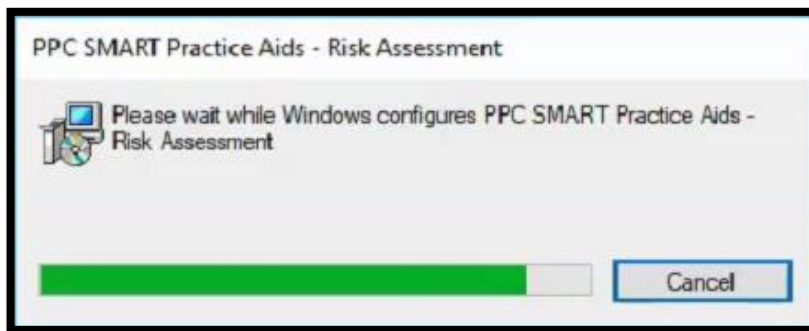
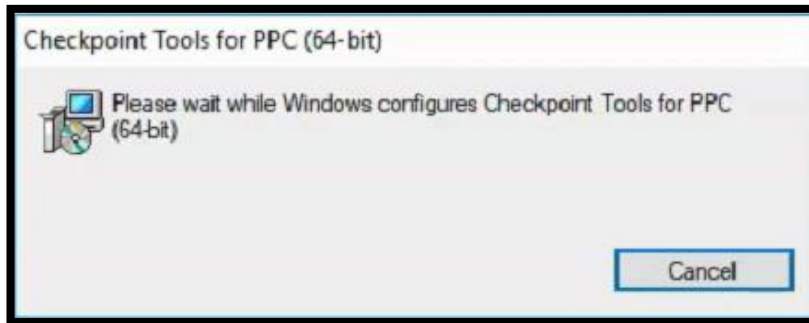
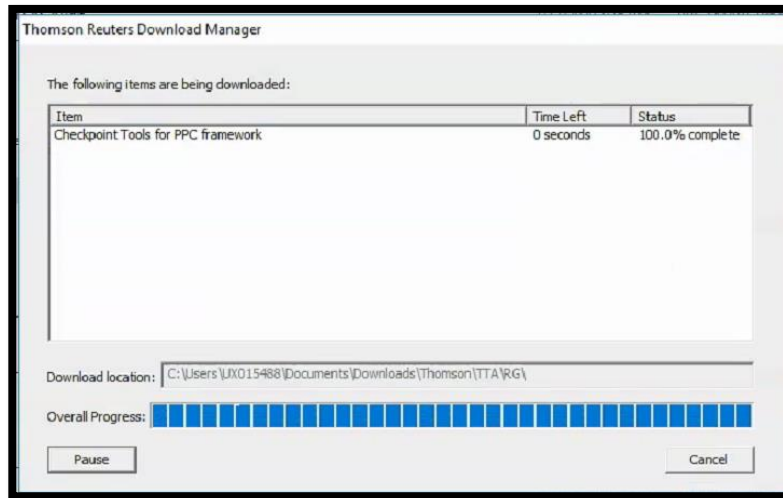
Note: You may be required to accept license agreements for other necessary components (in addition to the Checkpoint Tools License Agreement). Other components appear on this screen only if you do not already have these components installed on your machine from other sources.

16. The **Download Manager** dialog screen displays the downloading progress for each of the selected products and any required components:



Note: This process may take several minutes, depending on network conditions and the number of products you selected.

17. Once downloads are completed successfully, the individual product and component installations will proceed.

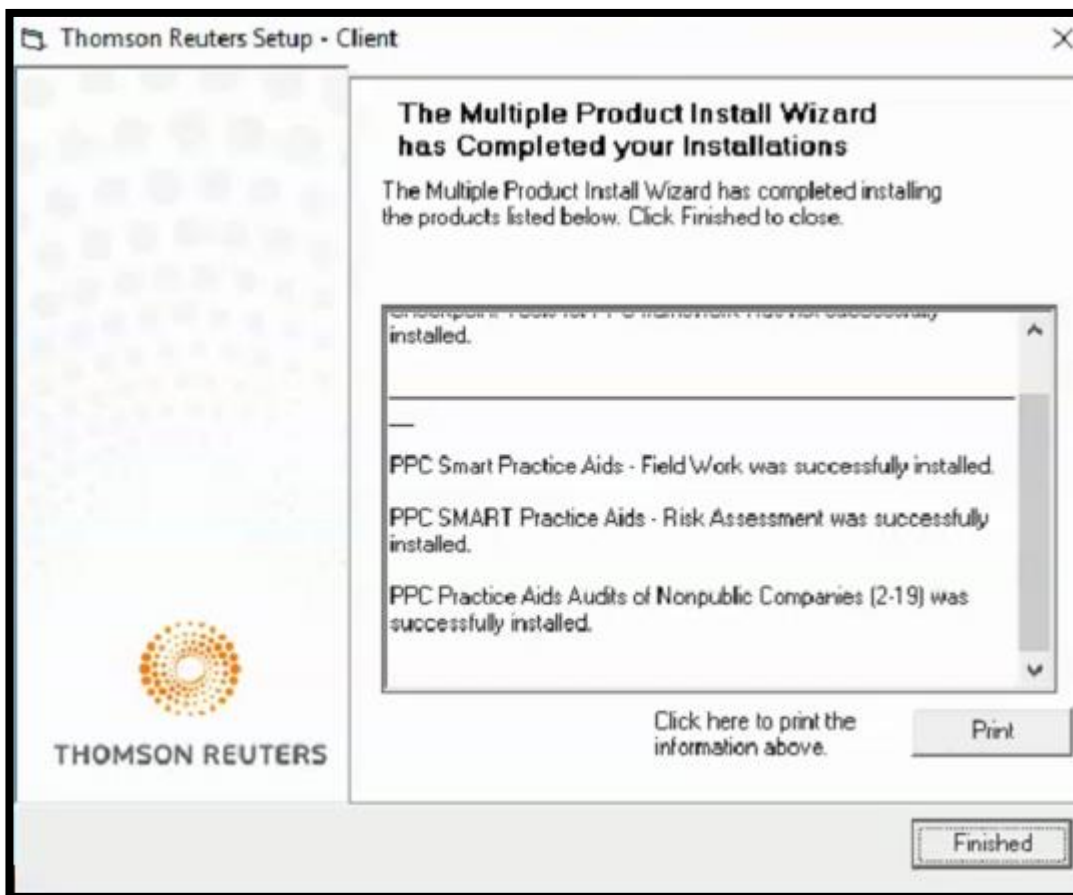


18. Upon completion of the product installations, the following macro security message will remind you that to use Checkpoint Tools for PPC templates, you must set the Microsoft Word/Excel security settings to **Medium** or **Low**.

Click **OK** to acknowledge this message.



19. Once the installation process is complete, you will see a list of the products that were installed:



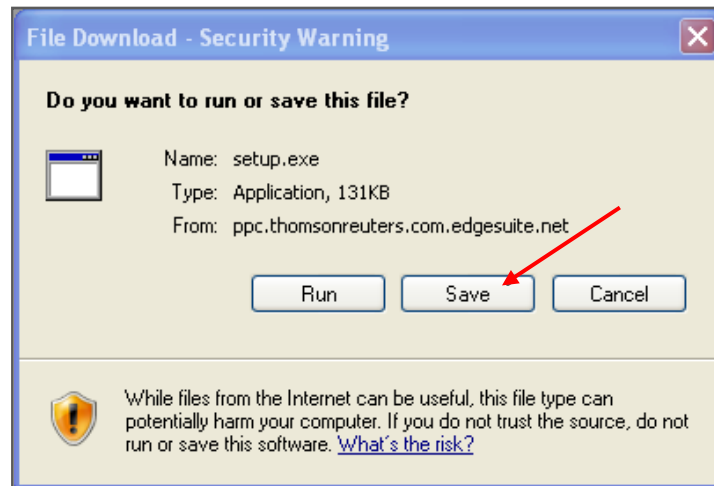
20. Click **Print** if you want to print this information.
21. Click **Finished**.
22. Locate and click **Checkpoint Tools for PPC, PPC SMART Practice Aids** icon on your desktop to open the application:

APPENDIX

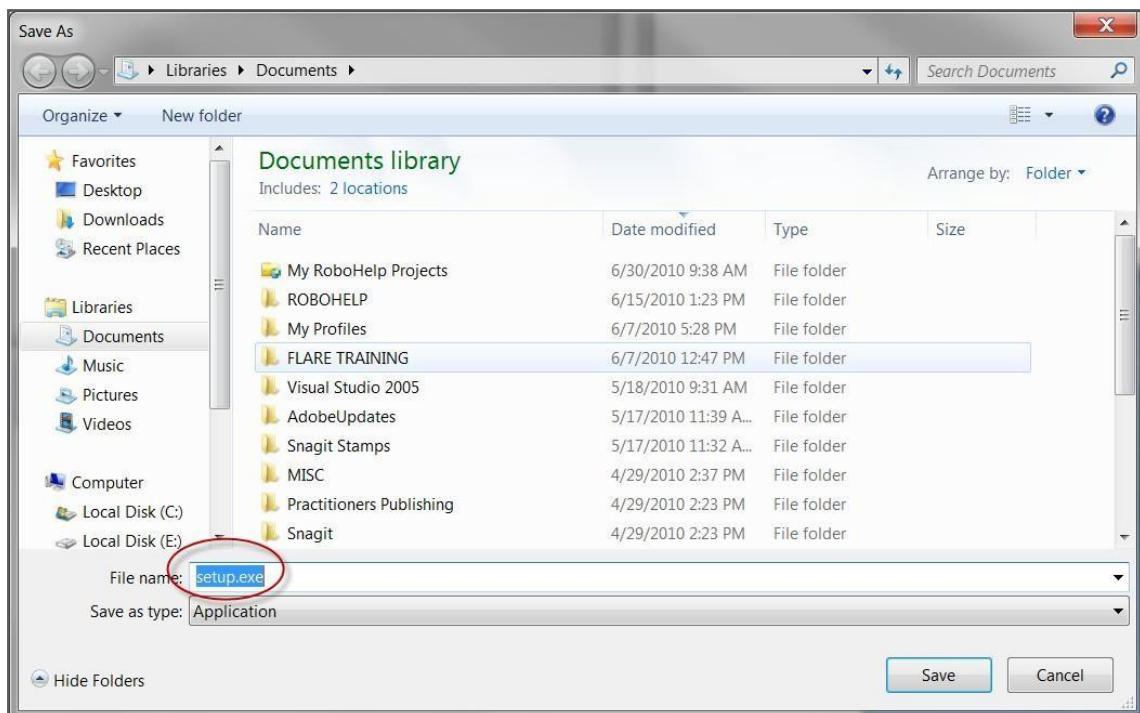
Special Instructions For Internet Installations on Windows 7 (SP1 Recommended)

If you followed the installation instructions on page 2 and you clicked **Run** on the first Security Warning window, you may have received an error message that “you do not have permission to install any products.” By following the supplemental instructions below, you should be able to install your products.

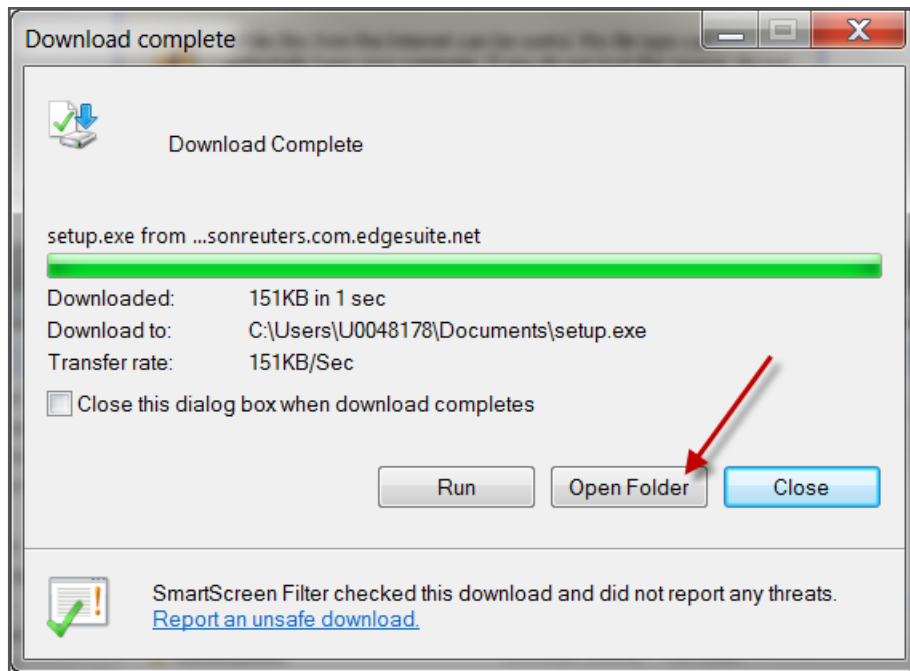
1. Instead of **Run**, click **Save** on the **File Download – Security Warning** dialog screen.



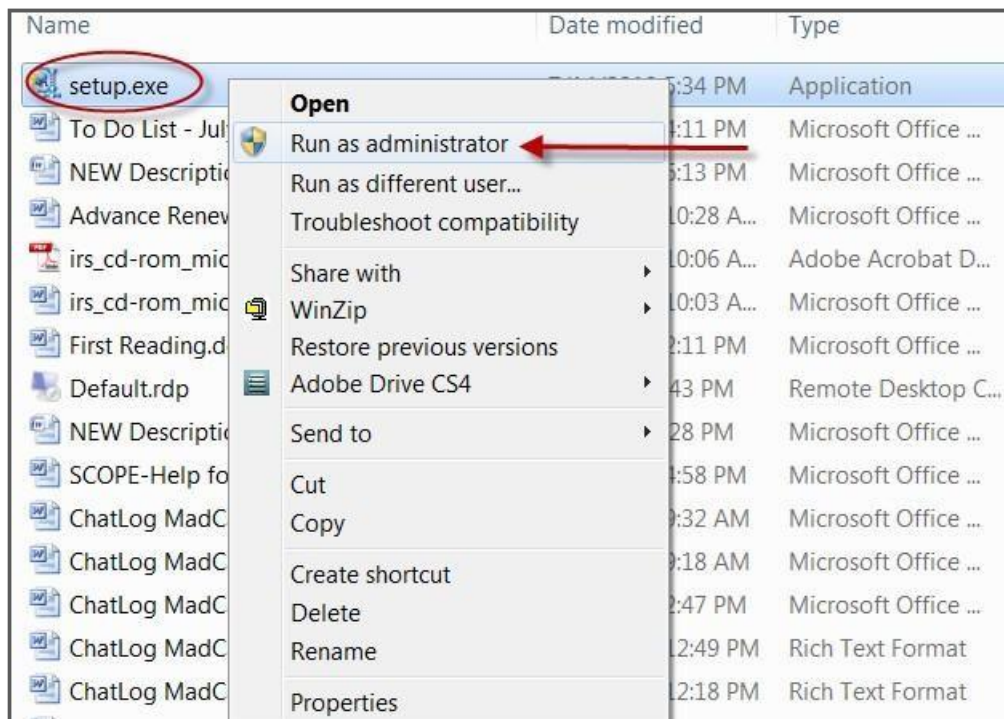
2. Select a location to save the *setup.exe* file and click **Save**.



3. Click **Open Folder**.



4. Right-click **setup.exe** and select **Run as administrator**.



5. Return to **step 8** on page 3 and continue the installation process.