



REUTERS/Beawiharta

PPC's SMART Practice Aids

Learn How to Easily Install

July 2013



Agenda

- Objectives
- SMART Practice Aids System Requirements
- SMART Installation Pre-Requisites
- Installation Scenarios
- The PPC Data Management Viewer Tool
- Database Best Practices
- Q&A
- Installation Resources



Today's Objectives

- For new SMART Practice Aids customers, learn the system requirements and installation pre-requisites to help ensure a successful installation in your firm
- Review the installation options and determine the best approach for your firm
- This course is intended for experienced IT personnel responsible for administrative and network installation and support of SMART in your firm

System Requirements - Hardware

- Pentium 4 compatible, 1 GHz or higher CPU (2 GHz or higher strongly recommended)
 - You may experience slow performance when operating on less than a 2 GHz processor, but slow performance can be partially mitigated by closing all other applications.
- 4 GB RAM or higher
- 200 MB hard disk space (1GB for Microsoft SQL Server 2008 R2 Express SP2)
- SVGA monitor - 256 colors minimum and 1024 X 768 resolution or higher
- PPC products are designed for professional production work. Windows Vista and Office 2007 and higher versions require powerful equipment to operate efficiently.

System Requirements - Software

- Windows XP Professional with SP3, Windows Vista with SP2, Windows 7 (SP1 recommended), Windows 8
 - Office 2003 with SP1, Office 2007 with SP2, Office 2010 (32-bit version), Office 2013 (32-bit version)
 - Note: Microsoft plans to retire Office 2003 from extended support on 4/8/2014. Therefore, we recommend upgrading to the latest version of Microsoft Office by 12/31/2013 for Checkpoint Tools PPC framework.
 - Note: Microsoft is planning to retire Windows XP from extended support on 4/8/2014, at which time we will discontinue supporting the use of our products on this operating system. Product releases subsequent to 4/8/2014 may no longer be able to be installed on computers running Windows XP.
- For complete details, please visit Microsoft's web site at <http://support.microsoft.com/lifecycle>.
- The 64-bit version of Office 2010 and 2013 are not supported - Microsoft strongly recommends the use of the 32-bit version of Office
 - Office Student/Teacher and Home & Student, Office Click-to-Run, and Starter, Office 365 Web Apps editions are not supported



THOMSON REUTERS

5

Additional System Requirements - Software

- Server Operating Systems supported include Windows Server 2003 SP1 (SP2 recommended) and Windows Server 2008 SP1 (SP2 recommended), Windows Server 2008 R2 (SP1 recommended), Windows Server 2012
- Microsoft Internet Explorer (7.0 or greater)
- Communications requirements:
 - Direct and reliable connection to the Internet with a national ISP
 - High-speed connection (broadband, DSL, T1, etc.)
- For Office 2003 users, SMART Practice Aids requires the use of the Microsoft Office Compatibility Pack for Word, Excel, and PowerPoint 2007 File Formats
- For environments using Citrix: Citrix XenApp 6.0 or 6.5
- One or more PPC's Practice Aids audit and accounting titles must be properly licensed and installed
- When using a public or private cloud vendor, please review their security practices for isolating your data and applications
- Please see the complete list of system requirements on the Support site at <http://support.checkpoint.thomsonreuters.com>



THOMSON REUTERS

6

SMART Installation Pre-requisites

The following pre-requisites are installed automatically, if not detected by the system, when using the standard installation (setup.exe). For custom installations, ensure that all pre-requisites are installed first.

- .NET 4.0
- SQL Server 2008 Express R2 SP2 (if installing SMART with a local database)
- 64-Bit Shell Extension - for 64-bit systems only
- PPC Data Management Viewer
- Windows Installer 4.5 (required for SQL Server 2008 R2 Express)



THOMSON REUTERS

7

Installation Scenarios

- 1. Installing to an Individual Machine (Typical Installation)**
Single workstation install of both SMART Practice Aids application and local SQL Express database.
 - 2. Basic Software Deployment to Multiple Machines (Administrative Install)**
Administrator provides users an administrative installation point for running setup.exe that installs SMART products and pre-requisites.
 - 3. Client/Server Installation with Database on Client and Server (Advanced)**
Results in users having both a local database and one or more shared network databases.
 - 4. Client/Server Installation with Database only on Server (Advanced)**
SMART Practice Aids products are installed to local workstations with no local database and are configured to use one or more shared network databases.
 - 5. Client/Server Installation with Database Only on Server (Citrix Installation - Advanced)**
SMART Practice Aids products are installed to Terminal Services or Citrix servers with no local database and are configured to use one or more shared network databases.
- Complete instructions for all installation scenarios are provided on the Support website at <http://support.checkpoint.thomsonreuters.com>



THOMSON REUTERS

8

Checkpoint



Basic Installation Options

- Use these options if your firm does not have a dedicated software deployment staff
- Use if you do not have a need to customize the SMART Practice Aids installation beyond basic customizations
- Use for installing to the local PC directly from DVD, or from the Web by access through Checkpoint. Please see [PPC SMART Practice Aids Detailed Installation Guide – All Options](#) for detailed instructions regarding these options.

1. Installing to an Individual Machine (Typical Installation)

This option is recommended for firms that do not have dedicated software deployment staff. This option provides a basic installation experience and is run by the user on the local PC directly from DVD, or from the Web by access through Checkpoint.

- From the workstation, run the SMART Practice Aids installation (for all products/modules you need), selecting the Install to Local Machine option. End users must have administrative rights on their PCs to run the installation.

See [PPC SMART Practice Aids End User Installation Guide – Local Machine Only](#) for detailed instructions on this option.



THOMSON REUTERS

11

2. Basic Software Deployment to Multiple Machines (Administrative Install)

This option is recommended for firms that do not have dedicated software deployment staff, but want a little more control over the installation experience for the end users in the firm.

- This installation option is run directly from the Web or CD installers and provides a basic installation experience that end users can run themselves. The person running the administrative installations has some basic options to customize the installation before sharing the installation with end users in their firm. The end users will run the installation from the shared location. The end users must have administrative rights on their PCs to run the installation.

Please see [PPC SMART Practice Aids Detailed Installation Guide – All Options](#) for detailed instructions.



THOMSON REUTERS

12

Advanced Installation

- Use these options if your firm has a dedicated software deployment staff
- Use if you have a need to customize the SMART Practice Aids installation beyond basic customizations
- Detailed instructions for setting up a shared SMART Practice Aids database on your network are provided
- Use when the end users are not granted administrative privileges on their PCs, which are required to install SMART Practice Aids

Please see [PPC SMART Practice Aids Detailed Installation Guide – All Options](#) for detailed instructions regarding these options.



3. Client/Server Installation with Database on Client and Server (Advanced)

Use this option if you want all users to have available a shared database on the network as well as a database on their own PC. This provides a way to share engagements with all the users in the firm, but also allows users to transfer engagements to their PC to work on the engagements in the field. If a group of users is in the field at one location, one of the users may also share the database on their PC with other users in the field.

Installation overview:

1. Set up Shared databases (TOCTTARGPPC05 SQL instance) on the servers. Refer to [PPC SMART Practice Aids Detailed Installation Guide](#)
2. Run the SMART Practice Aids Administrative Installation (for each product/module) directly from **setup.exe** using a command line and selecting both the **Application** and **Database** options on the Custom Setup dialog.
3. Deploy to each workstation.



4. Client/Server Installation with Database only on Server (Advanced)

Use this option if you only want the end users using shared databases on your network. You would typically only choose this option if you do all your engagement work in the office or you provide a way for users in the field to connect to the shared database remotely (an internet connection would be required).

Installation overview:

1. Set up shared databases (TOCTTARGPPC05 SQL instance) on the servers. (Refer to [PPC SMART Practice Aids Detailed Installation Guide](#)).
2. Run the SMART Practice Aids Administrative Installation (for each product/module) directly from the setup.exe—using a command line and unchecking the **Database** option on the Custom Setup dialog.
3. Deploy to each workstation.

5. Client/Server Installation with Database Only on Server (Citrix Installation - Advanced)

Use this option if your firm uses Terminal Services or Citrix and would like to make SMART Practice Aids available through these services.

Installation Overview:

1. Set up Shared databases (TOCTTARGPPC05 SQL instance) on the servers.
2. Run the SMART Practice Aids Administrative Installation (for each product/module) directly from setup.exe using a command line and selecting the application only under the Custom Setup Type option.
3. Deploy to each Citrix server. (Use either the push or pull method)

PPC Data Management Viewer Tool

- A new tool that is installed with SMART Practice Aids
 - Installed in the SMART Practice Aids Tools subfolder
- Helps you perform common administrative functions in these areas: Administration, Performance, Data Integrity
- **Administration**
 - Centralized Administration – Manage multiple databases (local or remote) from one place
 - Database Information – See database size and related information (e.g., edition, version)
 - Activity Management – View and delete engagement lock and session records
 - Bulk Transfer – Transfer selected engagements to file and/or another database
 - Reporting – Create Excel and HTML-based reporting of data presented in PPC Data Management Viewer
 - Command Line Support – Perform basic backup and index operations from the command line
 - Help Documentation – View PDF-based help documentation

PPC Data Management Viewer Tool

- **Performance**
 - PPC Data Management Advisor – Quickly analyze common maintenance items
 - Index Management – View and easily maintain database indexes
 - Bulk Delete – Delete selected engagements as well as unused books and disclosure content
- **Data Integrity**
 - Database Backups – Quickly create full database backups and see when last backups were performed
 - Consistency Checks – Perform consistency checks to ensure physical integrity of the data files

PPC Data Management Viewer

The screenshot shows the PPC Data Management Viewer application window. The title bar reads 'PPC Data Management Viewer (C:\Program Files\Thomson Reuters\PPC Tools\SpaDmv.exe)'. The application has a menu bar with 'File', 'Data', 'View', 'Reports', and 'Help'. Below the menu bar is a toolbar with icons for 'Engagements', 'Backup', 'Checkboxes', 'Filter', 'Sessions', 'Locks', and 'Refresh'. The main area contains a table with the following columns: 'Name', 'Date', 'Client', 'Type', 'Engagement', 'In-Progress', 'Read Only', and 'Last Modified (UTC)'. The table lists several engagement records, including those for '2011.1.1', '2011.1.2', and '2011.1.3'.

Name	Date	Client	Type	Engagement	In-Progress	Read Only	Last Modified (UTC)
2011.1.1	1/1/2011	2M Co.	Engagement	001	001	001	1/1/2011 2:24 PM
2011.1.2	1/2/2011	Adapt Laboratories	Engagement	001	001	001	1/2/2011 2:58 PM
2011.1.3	1/3/2011	IBM	Engagement	001	001	001	1/3/2011 2:58 PM
2011.1.4	1/4/2011	IBM	Engagement	001	001	001	1/4/2011 2:58 PM
2011.1.5	1/5/2011	IBM	Engagement	001	001	001	1/5/2011 2:58 PM
2011.1.6	1/6/2011	IBM	Engagement	001	001	001	1/6/2011 2:58 PM
2011.1.7	1/7/2011	IBM	Engagement	001	001	001	1/7/2011 2:58 PM
2011.1.8	1/8/2011	IBM	Engagement	001	001	001	1/8/2011 2:58 PM
2011.1.9	1/9/2011	IBM	Engagement	001	001	001	1/9/2011 2:58 PM
2011.1.10	1/10/2011	IBM	Engagement	001	001	001	1/10/2011 2:58 PM
2011.1.11	1/11/2011	IBM	Engagement	001	001	001	1/11/2011 2:58 PM
2011.1.12	1/12/2011	IBM	Engagement	001	001	001	1/12/2011 2:58 PM
2011.1.13	1/13/2011	IBM	Engagement	001	001	001	1/13/2011 2:58 PM
2011.1.14	1/14/2011	IBM	Engagement	001	001	001	1/14/2011 2:58 PM
2011.1.15	1/15/2011	IBM	Engagement	001	001	001	1/15/2011 2:58 PM
2011.1.16	1/16/2011	IBM	Engagement	001	001	001	1/16/2011 2:58 PM
2011.1.17	1/17/2011	IBM	Engagement	001	001	001	1/17/2011 2:58 PM
2011.1.18	1/18/2011	IBM	Engagement	001	001	001	1/18/2011 2:58 PM
2011.1.19	1/19/2011	IBM	Engagement	001	001	001	1/19/2011 2:58 PM
2011.1.20	1/20/2011	IBM	Engagement	001	001	001	1/20/2011 2:58 PM
2011.1.21	1/21/2011	IBM	Engagement	001	001	001	1/21/2011 2:58 PM
2011.1.22	1/22/2011	IBM	Engagement	001	001	001	1/22/2011 2:58 PM
2011.1.23	1/23/2011	IBM	Engagement	001	001	001	1/23/2011 2:58 PM
2011.1.24	1/24/2011	IBM	Engagement	001	001	001	1/24/2011 2:58 PM
2011.1.25	1/25/2011	IBM	Engagement	001	001	001	1/25/2011 2:58 PM
2011.1.26	1/26/2011	IBM	Engagement	001	001	001	1/26/2011 2:58 PM
2011.1.27	1/27/2011	IBM	Engagement	001	001	001	1/27/2011 2:58 PM
2011.1.28	1/28/2011	IBM	Engagement	001	001	001	1/28/2011 2:58 PM
2011.1.29	1/29/2011	IBM	Engagement	001	001	001	1/29/2011 2:58 PM
2011.1.30	1/30/2011	IBM	Engagement	001	001	001	1/30/2011 2:58 PM
2011.1.31	1/31/2011	IBM	Engagement	001	001	001	1/31/2011 2:58 PM

To launch the PPC Data Management Viewer:

1. In Windows Explorer, browse to <Program Files>\CommonFiles\PPC\Tools\SpaDmv.
2. Double-click SpaDmv.exe. This will launch the PPC Data Management Viewer.



THOMSON REUTERS

19

Database Best Practices

Back Up Your Data

- You should back up your data frequently. You can back up engagements individually, by saving them as backup or transfer files. You can also back up the entire database.

Check Data Files Health

- SMART Practice Aids® products store their data in SQL Server. As with any database, the physical data files can become physically corrupt due to any number of environmental circumstances (e.g., a bad disk sector). Check the physical health of your data files regularly to ensure there are no errors.



THOMSON REUTERS

20

Database Best Practices

Manage Database Size

- The size of SMART Practice Aids® book and disclosure content engagements vary, but they are typically many megabytes each. Although SQL Server 2008 Express R2 now supports a 10GB database, keeping unused engagements and content in the database takes up space and can adversely affect the performance of your database.
- Delete product content and engagements that are no longer used to free up space and potentially improve performance (500 engagements maximum recommended for optimal performance). Prior to deleting engagements, back them up individually by transferring them to file or to another compatible database. After deleting engagements, rebuild the database indexes to reduce fragmentation.

Tip: Sort engagements by Last Modified to see which engagements haven't been modified recently. Transfer those engagements out of the database for safekeeping, and then delete them to free up space. The size of the data files (MDF and LDF) will not shrink when you delete data. The space freed by the deleted data is retained by SQL Server and used for future growth. While it is possible to shrink the data files, it is not recommended. For more information, see [Microsoft MSDN](#).



THOMSON REUTERS

21

Database Best Practices

Optimize Indexes

- Ensuring that the indexes in your databases are not fragmented can improve performance, because well ordered indexes require less I/O and memory during query executions. This means faster queries.

Manage User Sessions

- If a user closes the SMART Practice Aids® product abnormally, then the session and lock records for that user may be left in the database. The next time that user (on that machine) uses the product, they will reuse their session and lock. But if they haven't used the product again, then the session record could be left in the database indefinitely. This could prevent others from deleting the engagement or from opening the engagement in multi-user mode. In such cases, you can delete sessions and locks to allow others to access the engagement.



THOMSON REUTERS

22

Database Best Practices

Different System Administrator Account Password

- If you use your own system administrator account password, you can configure the PPC Data Management Viewer tool to use it, by replacing the SpaConnectionPassword value in the application configuration file. The configuration file is named SpaDmv.exe.config, and it is located in the PPC Data Management Viewer tool installation folder.

Account Other Than System Administrator

- Using the system administrator account may not be desirable from a security standpoint.
- You can use a different account by changing the SpaConnectionUser and SpaConnectionPassword entries in the application configuration file (SpaDmv.exe.config in the PPC Data Management Viewer tool installation folder). The recommended option is to use the ETLSPAADMIN account, since it already has permissions to use SMART Practice Aids-related database objects, and to grant these additional permissions.

Q&A

Installation Resources

Where can I get additional help?

<http://support.checkpoint.thomsonreuters.com>

- System requirements
- Installation instructions
- Sample login script template
- FAQs
- Product Training

