UPDATING THE CS PROFESSIONAL SUITE ACCOUNTING PRODUCTS VIA CS CONNECT: Version Management Guide

Introduction

CS Connect™ provides users of the CS Professional Suite® Accounting Products with a convenient way to obtain software updates and user bulletins via standard Internet connection or via modem. Each installed version of the Creative Solutions Accounting™ (CSA) software enables you to open CS Connect to download and apply program updates whenever they are available.

If your firm uses multiple installations of the program in a networked environment, it is very important to keep the program versions synchronized. Client data can be shared only among users who are running the **same** version of the software. After client data has been opened and updated within a newer version of the software, it can no longer be opened from a prior version.

Because we may provide updates to the CSA software several times throughout the year and make those updates available via CS Connect, your firm may find it challenging to keep multiple installations of the software properly synchronized. This guide is intended for those using Staff-level (user-specific) security features in CSA to assist them in managing updates more efficiently for multiple installations, both in the office and in the field. (For details about user-specific security in CSA, search on **Security** from the index of the CSA help browser and click **Setting up user-specific security access in CSA.**)

This guide outlines a set of best practices and procedures for making version management tasks easier for your firm. There are two environments to consider when you need to synchronize multiple versions of the software for the CSA users within your firm, and both are covered in detail in the sections that follow:

▪ Network, desktop, and laptop installations in the office

▪ Laptop installations in the field

Notes

▪ Thomson Reuters issues software update notices via email. To receive these notices, you must have an email account and sign up for our **Email Subscription** service from the My Account section of our website at CS.ThomsonReuters.com. (Note that you must create a web account to sign up for email subscriptions.)

▪ Email subscribers receive email notifications only about CSA products for which they are currently licensed. These emails provide information about which CS Professional Suite® Accounting Products have been updated, enabling you to retrieve updates for the product that you have installed.

▪ Each CSA software update is accompanied by a user bulletin that describes the changes and/or enhancements included in that update. After downloading an update, you can choose to open and review the user bulletin prior to applying the update.

▪ CSA enables you to retrieve and apply updates from CS Connect when it is most convenient for you. For example, if your firm is licensed for Trial Balance CS™ and Engagement CS,™ you may want to retrieve only the updates that apply to those products. If there are currently updates available for Payroll CS™ only, you can **delay** downloading and applying those updates until the next Engagement CS update becomes available.

▪ CS Connect enables you to apply updates at a time that is most convenient for your firm and when all users have exited the CSA software. It is important that all users exit CSA before program updates can be applied successfully. In the CSA Connect dialog, click the **Apply updates later** option and set a time in the future for updates to be applied. You can close the CSADelay dialog when the countdown begins.

In the office — network, desktop, and laptop installations of the CSA software

The office environment often requires a network installation of the CSA programs plus laptop installations for staff that need to access client data when not connected to the network. The network and laptop versions must be synchronized so that the client data can be accessed from both environments. Using the methods described in this guide, your firm should always plan to apply program updates **first to the network installation and then to the laptop installations** for individual users.

Updating a network installation of CSA

The network installation of CSA can be updated by any desktop user with access to the Internet and with the relevant security privilege.

We recommend that you provide a small number of staff with the security privilege **Retrieve available updates** — which enables them to download CSA program updates via CS Connect at a time that is most convenient for the whole team. To set up this privilege: (1) Open CSA and choose Setup / System Configuration / Administration; (2) click the Groups tab in the Administration dialog, select the Group you wish to change and then click the Group Privileges button; (3) on the General tab of the Group Privileges dialog, mark the Retrieve Available Updates checkbox – be sure to unmark this checkbox for **all** other groups.

Any staff member with the security privilege to retrieve (download) available updates via CSA Connect may do so as soon as updates become available. Once an update has been downloaded, it can be **applied** by any staff member with access to the CSA software.

Running the desktop setup utility

If an update requires a **desktop setup**, that requirement is specified in the user bulletin that accompanies the update. Users would be prompted to run the desktop setup the first time they open the program after the update has been applied to the network installation.

Pushing updates from the network to laptop installations

As soon as one or more program updates have been downloaded and applied to a network installation of CSA, those updates can be made available to a laptop installation of CSA using any one of the following methods.

Using the backup and restore commands

1. Open the version of CSA to which the update was already applied.

2. Choose File / Backup, and select Updates from the F4 drop-down list. Double-click CSA Software Updates to select it and click the Backup button to save the update files to the designated backup location.

3. Open CSA on the laptop computer to which you want to restore the updates.

4. Choose File / Restore, select Updates from the F4 drop-down list, and specify the location where the backup files have been saved.

5. Upon opening the program, you are automatically prompted to apply the CS Connect update.

Using a login script

CSA updates downloaded via CS Connect to the firm's network installation of CSA are automatically saved to the *h:*\Wincsi\CSA\Updates folder on the network (where *h:* represents the network drive where the CSA program files are installed). The login script should copy the available updates to each laptop's *d*:\Laptop\Wincsi\CSA\Updates folder as soon as the laptop is connected to the network (where *d:* represents the laptop drive where the CSA program files are installed). When the laptop installation of CSA is opened, the laptop user is prompted to apply the available updates.

Using the laptop setup utility

A laptop user currently connected to the firm's network can use the laptop setup utility to apply any CSA updates that have already been downloaded and applied to the network installation of CSA. From the laptop computer, choose Start / Run and enter *d:*\Wincsi\CSA\Laptop\Setup.exe (where *d* represents the laptop drive where the CSA program files are installed).

Note: A disadvantage of using this method is that, because the software update file is present only on the network and not on the laptop itself, staff working in the field cannot back up the update to provide to other staff working in the field.

In the field — laptop installations of the CSA software

As mentioned above, it is critical that all laptop versions and networked versions of the CSA software be synchronized so that the client data can be accessed successfully by each computer. **Only those program updates that have already been applied to the firm's network installation should be applied to laptop installations.**

When working in a field environment, staff members using the laptop installation of CSA do not typically have access to their own firm's network but may still need to update their CSA software. Any staff member who has already applied the most recent program updates can pass those updates to other staff members (via email, for example) using the backup-and-restore procedure described above.

It's a best practice to provide a backup of program updates from the network along with client data when working in the field. This ensures that all CSA users are on the same version of the program and prevents version conflicts between the staff in the field.

Procedures for implementing best practices

Scenario 1

Firm ABC is licensed to use both Trial Balance CS and Engagement CS, and their CSA software is installed on the firm's network. The firm's IT administrator is in charge of downloading and applying all software updates. None of the firm's staff members work in the field, but they each have desktop installations of the program to maintain. Only the firm's partners have the program installed on their home computers. They have had problems in the past when one of the partners updated the program on his home computer to a newer version than was available on the firm's network. After that partner opened his desktop computer in the office and then restored client data from home, no one else in the firm was able to access that client's data. To correct the situation, the IT administrator was forced to get everyone out of the program so he could apply the available updates.

To implement best practices, this firm should do the following:

1. Set up a new group within CSA called **DownloadUpdates** and select only the **Retrieve available updates** privilege for that group.

2. Assign only the IT administrator and his designee as members of the DownloadUpdates group.

3. Direct both the IT administrator and his or her designee to subscribe to the Email Subscription service for CSA so they will receive all email notifications whenever any new CSA software updates become available for download via CS Connect.

4. Direct the IT administrator or his designee to download CSA program updates only when he or she is actually ready to apply the updates on the firm's network. After downloading and applying updates on the network installation of CSA, he or she should use the File / Backup command to save a backup of the updates to a specified location on the network.

5. The partners should routinely backup the CS Connect updates at the same time that they backup the client data (e.g., on a flash drive to take home or into an email message to send to themselves at home) and then restore and apply the CSA program updates on their home computers.

Scenario 2

Firm XYZ is licensed to use both Trial Balance CS and Engagement CS, and their CSA software is installed on the firm's network. The firm's IT administrator is in charge of downloading and applying the CSA program updates via CS Connect. The firm has two teams (each with four staff members) that work out of the office on a regular basis and use laptop installations of CSA. A few of the staff members must work in the field for longer periods than others before returning to the office, and they have run into issues in the past when they have been unable to open and use the client data provided to them because they do not have the latest CSA program updates installed on their laptops. There have also been times when the network installation of CSA is unable to receive client data from staff in the field because the data has been opened in a newer version of the software.

A best practice for this firm would be to provide only the IT administrator and the staff-in-charge for the engagement with the ability to retrieve available updates for CSA.

1. Set up a new group within CSA called **DownloadUpdates** and select only the **Retrieve available updates** privilege for that group.

2. Assign only the IT administrator as members of the DownloadUpdates group.

3. Direct the IT administrator to subscribe to the Email Subscription service for CSA so they will receive all email notifications whenever any new CSA software updates become available for download via CS Connect.

4. Direct the IT administrator or his designee to download CSA program updates only when he or she is actually ready to apply the updates on the firm's network. After downloading and applying updates on the network installation of CSA, he or she should use the File / Backup command to save a backup of the updates to a specified location on the network.

5. The IT administrator should prepare a login script that copies the latest CSA program updates from the network (*h:*\Wincsi\CSA\Updates) to each team member's laptop (c:\Laptop\Wincsi\CSA\Updates) as soon as the laptop is connected to the network. The backup file can also be attached to email messages sent to staff in the field if they are unable to make it back to the office before needing to send or receive client data to/from other staff who have already applied the update.

6. If a staff member in the field has received and applied the program updates, he or she can provide a backup of the updates to pass along to other staff members if the field.

Additional information

There are other circumstances when a CSA user who opens the program is able to retrieve and apply updates — for example, in the following situations:

▪ **The CSA software is installed without licensing, or the licenses have expired.** The user who opens CSA is prompted to retrieve licenses via CS Connect. This process will download the available licenses along with all available program updates. The licenses and updates will then be applied.

▪ **The software has been reinstalled (via CD) to its original (prior) version.** A user who attempts to open the program at this point will see a message indicating that the system files cannot be opened because they have been updated to a later version and will then be prompted to download and apply the program updates via CS Connect.

In either of the situations described above, it would be possible to download and apply an update that was never previously applied. Any **new** updates that are applied need to be applied to all computers where CSA is installed and that share client data with one another using one of the methods described above.

Note: If you are continuously prompted to run desktop setup when you move between the laptop and network installation of CSA, there is most likely a version conflict between the two installations. Choose Help / About in CSA to check the version of the software and determine which installation needs to be updated via CS Connect, then follow the information outlined in this document to update your software.