
PPC'S SMART PRACTICE AIDS®

Installation with the database on the Client and Server

- General Installation Information 2
- Advanced Software Deployment..... 2
 - Client / Server installation..... 3
 - Installation with the database on client and server..... 3
 - Setting up a shared database..... 4
 - Using SQL Server Express to set up a shared database 4
 - Installing SQL Server Express to an alternate drive 12
 - Shared databases using an edition of SQL Server other than Express 13
 - Creating an administrative installation point for deploying the application..... 14
 - Without setting up a local database 14
 - Including setting up a local database..... 18
 - Download only (Web installer option) 23
- APPENDIX A – Deploying the application to the end user 28
- APPENDIX B – Upgrades 30
- APPENDIX C – Resources 31

Note: The content of this guide was originally produced by PPC's SMART Practice Aids® and has been modified for Workpapers CS™ users who integrate with PPC's SMART Practice Aids when performing audit engagements in the field.

General Installation Information

Important! Administrator rights for the computer you are 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.

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.

- Windows Installer 4.5
 - .NET 4.0
 - SQL Server 2008 R2 Express SP2
 - 64-Bit Shell Extension - for 64-bit systems only
 - PPC Data Management Viewer
-

Note: Installing SMART Practice Aids - Risk Assessment is required if you want to use SMART Practice Aids - Internal Control or Field Work.

To configure Windows Firewall for use with the SMART Practice Aids database, see the information in [Appendix A](#).

Advanced Software Deployment

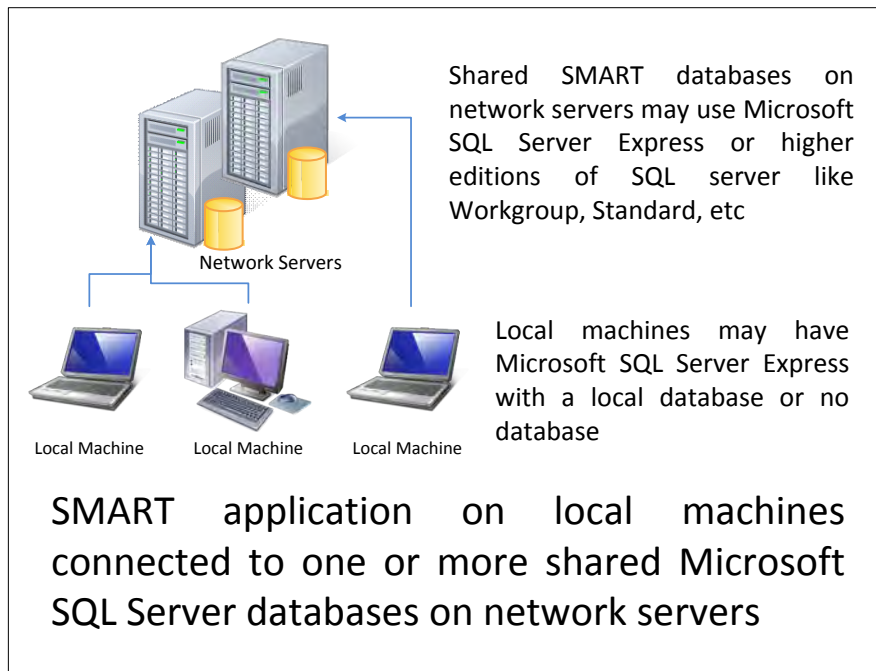
Before starting an advanced software deployment, be sure you have read and understand the instructions for a basic software deployment.

Using the advanced software deployment, an administrator can perform the following tasks:

- Setup a shared database on a network server.
 - Configure the application installation to pre-populate the list of available database servers.
 - Configure the default database server the user will connect to when the application starts up.
-

Note: This install is recommended for **experienced** Network Administrators only.

Client / Server installation



Installation with the database on client and server

This scenario results in users having both a local database and one or more shared databases.

1. Setup Shared databases (TOCTARGPPC05 SQL instance) on the servers. (See [Setting up a Shared Database.](#))
2. Run the SMART Practice Aids Administrative Installation (for each product/module) directly from the setup.exe—using a command line and selecting both the database and the application under the Custom Setup Type option. (See [Creating an Administrative Installation Point for Deploying the Application, Including Setting Up a Local Database](#) to connect to shared databases and set up a local database.)
3. Deploy to each workstation. (See [Appendix A - Deploying the Application to the End User.](#))

Note: If SMART Practice Aids is already installed on end users' machines prior to setting up a shared database on a network server, those users will need to point to the shared database from the SMART Practice Aids menu: **Tools > Options > Point to a Different Database.**

Setting up a shared database

Installing a shared database to a server on the network allows you to share information more efficiently by using one or more common network databases. Install the SMART Practice Aids database on one or more network servers, and (optionally) on the individual workstations.

A shared database can be set up from either the SMART Practice Aids – Risk Assessment, Disclosure, Compilation and Review, or Audit Essential installation. The database setup only needs to be run from one of these products.

Note: If a shared database is created after SMART Practice Aids is installed on the end user's machine, each user will need to point to the shared database from the SMART Practice Aids menu **Tools > Options > Point to a Different Database**. If a shared database is created prior to installing SMART Practice Aids on a workstation, the administrative installation point can be configured to contain the location of the shared databases. (See the [Creating an Administrative Installation Point for Deploying the Application](#).) Users must be running a compatible version of the application to connect to the shared database.

Tip: The best practice is to run the database installation on the server that you want it installed on.

Using SQL Server Express to set up a shared database

Important notes regarding network server installations that use SQL Server Express:

A database in Microsoft SQL 2008 R2 Express or later version can contain a maximum of 10 GB of data, but this capacity may not be sufficient if a single database is used by lots of people. It is strongly recommended that you monitor the size of any shared database and that—by using the Backup and Delete functions—you proactively manage the number of engagements stored, or use multiple databases and procedurally distribute the engagements among the multiple databases.

Example:

- Server 1 has a database installed for Clients A-M.
- Server 2 has a database installed for Clients N-Z.

You can have only **one** instance of the SMART Practice Aids database on a server.

To ensure optimal performance of the database, we strongly recommended that you keep the number of engagements in the database to a minimum – our typical recommendation is no more than 500. (When using a SQL Server Express instance, SMART Practice Aids will warn you every time you open the application if there are more than 500 engagements in the database.) However, you may be able to work with more engagements in the database depending on the nature of the engagements, the number of concurrent users of the database, and the maintenance plan employed by your firm.

We also strongly recommended that you establish maintenance and recovery plans for the database. You can use the new PPC Data Management Viewer tool to perform common maintenance and recovery tasks more easily, such as creating database backups, maintaining indexes and deleting unused content. This tool is installed with SMART Practice Aids, under the Tools folder. See the “Maintenance Schedules” section of the PPC Data Management Viewer help documentation for additional information.

Note: SQL Server Express does **not** automatically warn you when you reach the maximum database capacity.

To install SQL Server Express on a network server perform the following steps:

1. Complete the [Download Only option for the PPC Web Installation Wizard](#), or insert the SMART DVD into the drive.

Record/print the download location from the final screen dialog of the PPC Web Installation Wizard. You will need this path in the next step.

The installation files are downloaded to "<My Documents>\Downloads\Thomson\TTA\RG." The installation files for each product are saved to a separate subfolder. For example, the SMART Practice Aids – Risk Assessment installation files are saved to "C:\Documents and Settings\<user ID>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010."

If you are installing from the DVD, the installation files for each product are separate subfolders off the root of the DVD. For example, the SMART Practice Aids – Disclosure installation files are located at "<Disc Drive Letter>:\SPDE."

2. Browse to the MSI file and double-click it to run it.

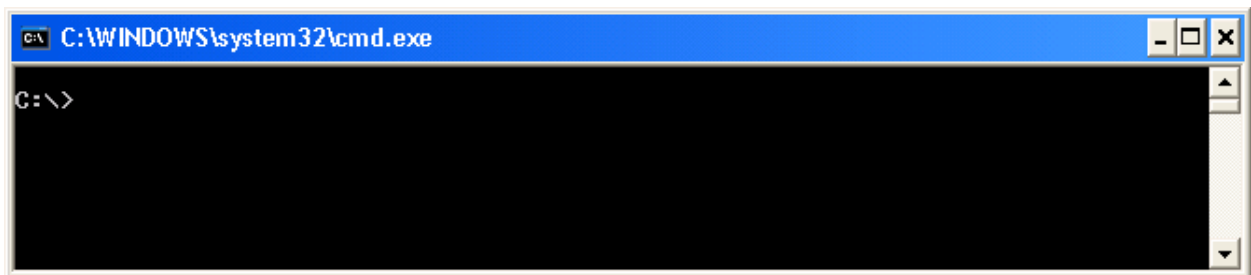
For example, if the installation was downloaded from the Web, browse to:

```
"C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010"
```

If you are installing from the DVD, browse to:

```
<disc drive letter>:\SPRE
```

3. Run the Command Prompt: **Start>Run>CMD**, which opens the following window:



4. At the command prompt, type the path to setup.exe, located in the product folder you opened in step 2. Be sure to include double quotation marks at the beginning and end of the path to setup.exe.

For example:

```
C:\>"C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010\setup.exe"
```

Tip: You can also drag setup.exe and drop it on the command prompt window instead of typing the full path to setup.exe.

5. Then type the **/s** command line parameter and the path to the shared downloads folder. Be sure to include double quotation marks at the beginning and end of the path to the shared downloads folder. Installation files that are shared between products are downloaded to the shared downloads folder. The path to the shared downloads folder is:

```
C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\Shared
```

Your command should now resemble:

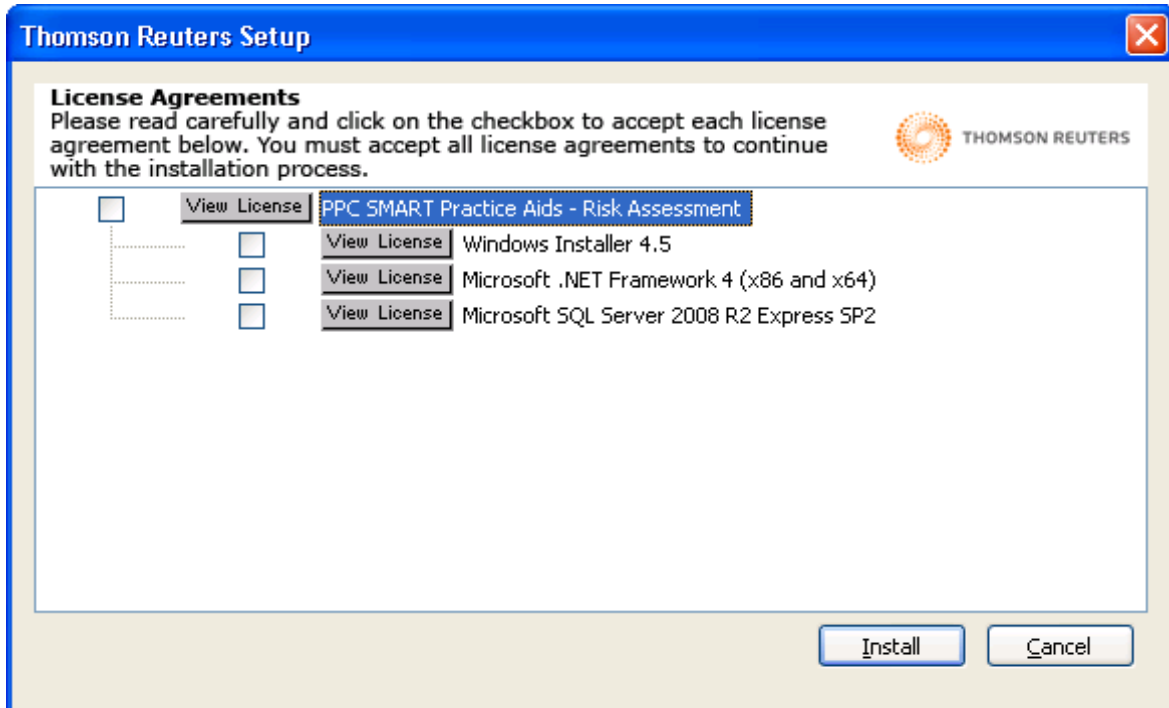
```
C:\>"C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010\setup.exe" /s:"C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\Shared"
```

Tip: After typing "/s:" at the command prompt, you can drag the shared folder and drop it into the command prompt window instead of typing the full path to the shared folder.

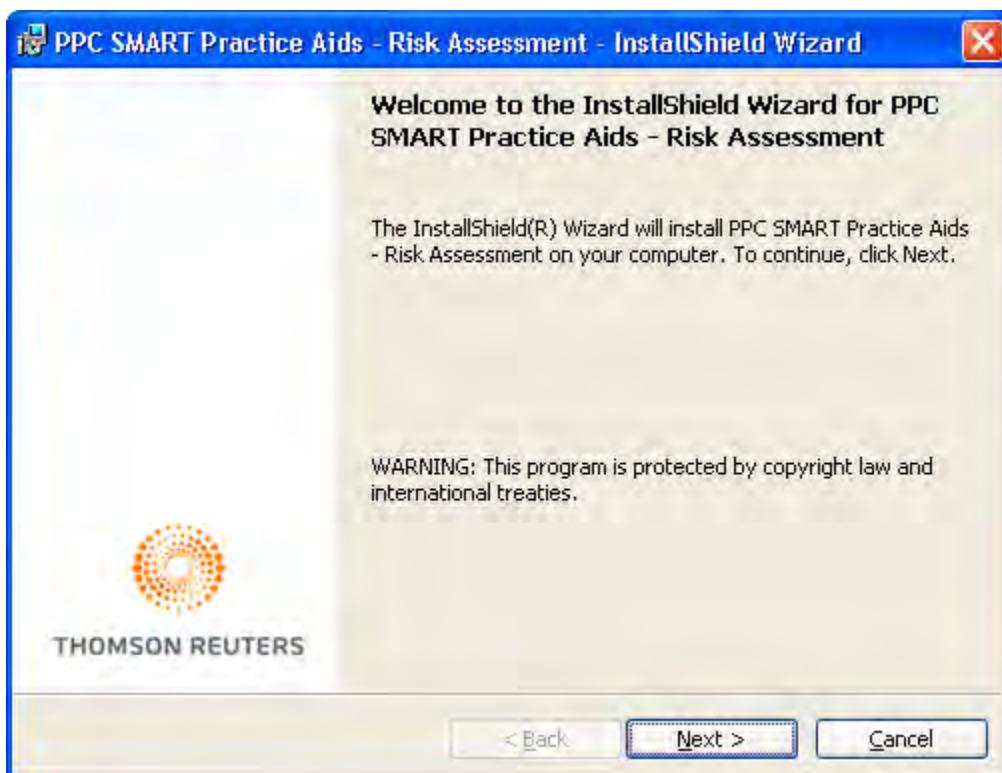
Note: When installing from the DVD the /s parameter is **not** needed.

6. Press **Enter** to run this set of instructions.

7. The *License Agreements* screen dialog for the SMART Practice Aids – Risk Assessment installation opens, showing all of the prerequisites that also have license agreements. **The box next to each item must be marked to indicate the license agreement has been read and accepted.**

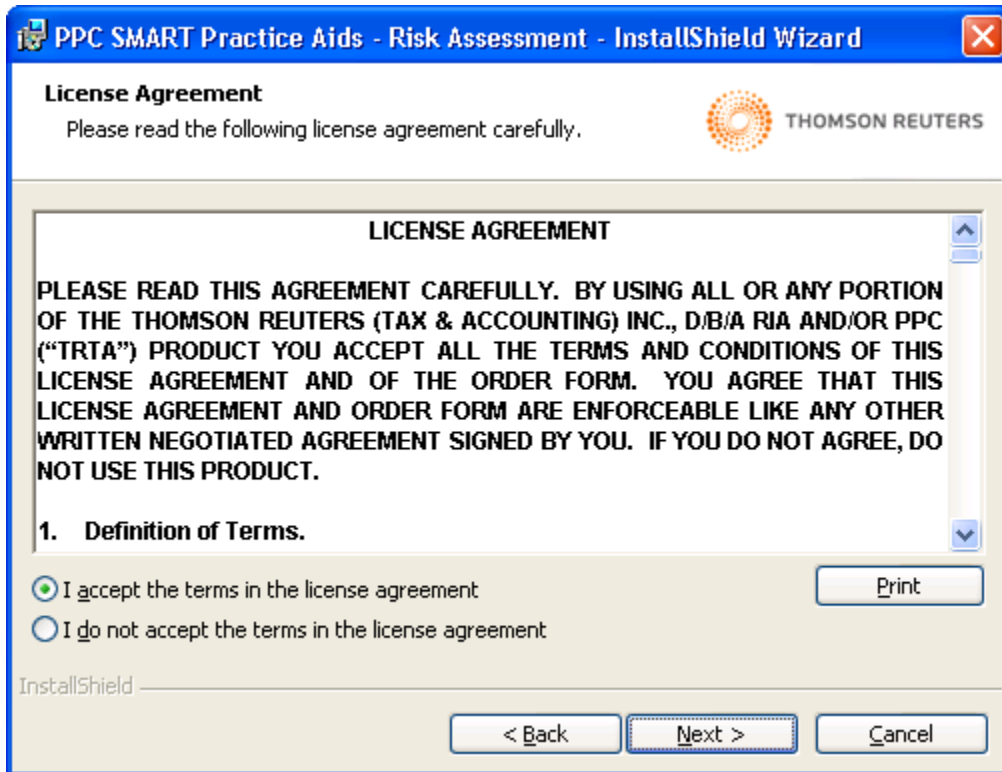


8. Click **Install**. After all of the prerequisites have been installed, the *Welcome* screen dialog for the application installation wizard opens:



9. Click **Next**.

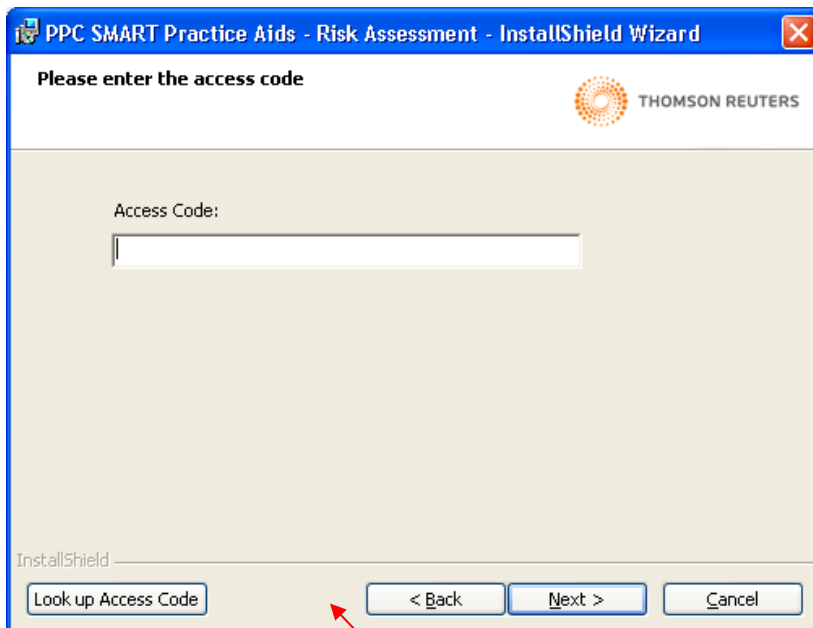
The *License Agreement* screen dialog opens:



10. Accept the License Agreement and click **Next**.

Note: To print the license agreement, click **Print**.

11. On the *Product Access Code* screen dialog, type your access code and click **Next**.

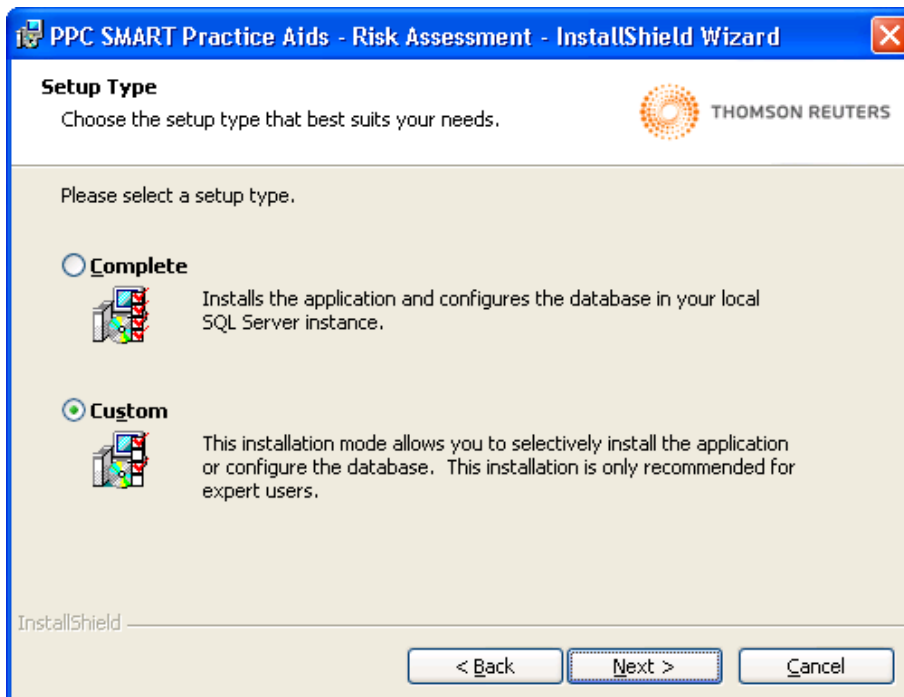


For help in finding your product access code, click **Look up Access Code**.

Note: If the installation was launched from a Web download, the product access code will be on the *Finish* screen dialog of the Web installer. If, on the other hand, the installation was launched from a DVD install you will find the product access code on your invoice.

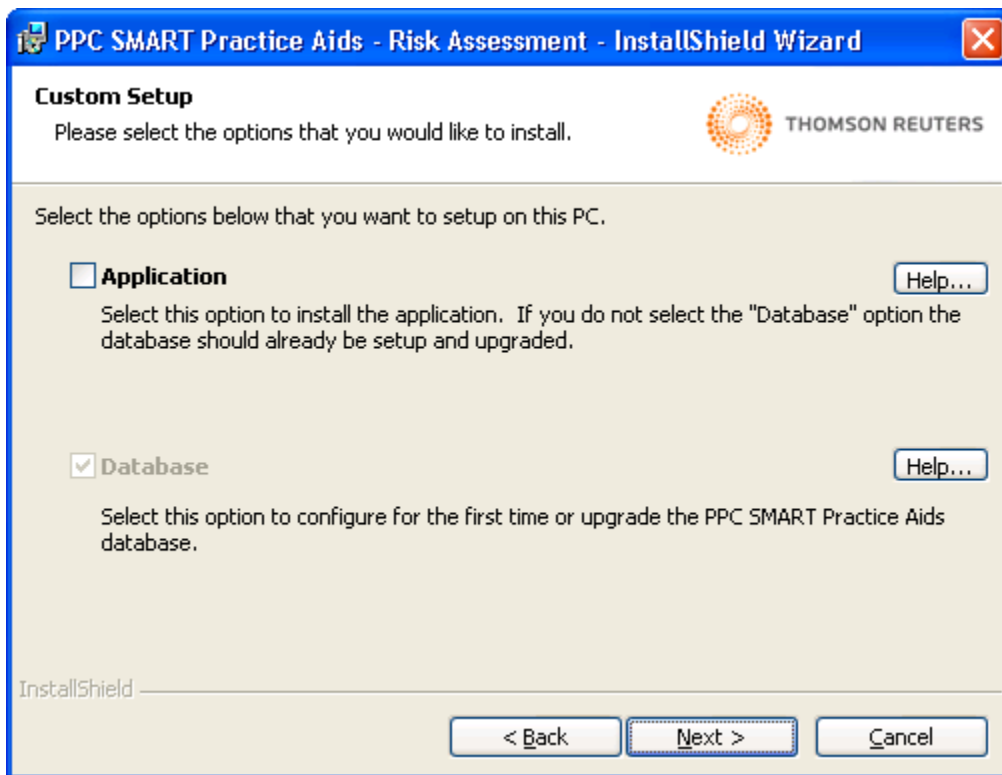
12. Click **Next**.

The *Setup Type* screen dialog opens:

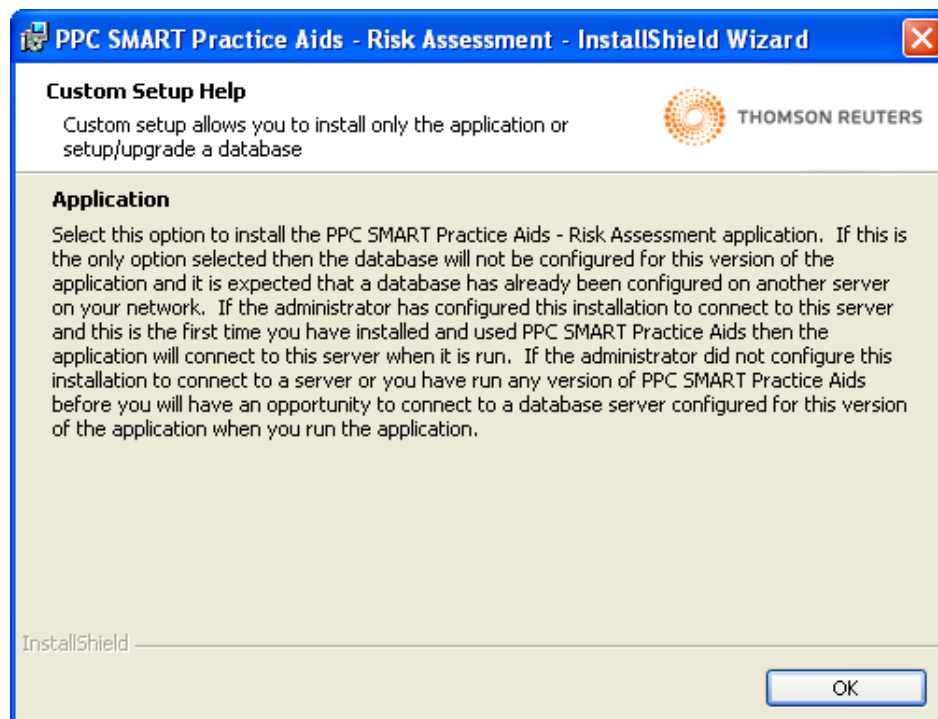


13. Select **Custom** and click **Next**.

Having selected **Custom**, you would see the *Custom Setup* screen dialog, from which you can select **Application** and/or **Database** installation. (Clear the check box next to **Application** to install just the database.)

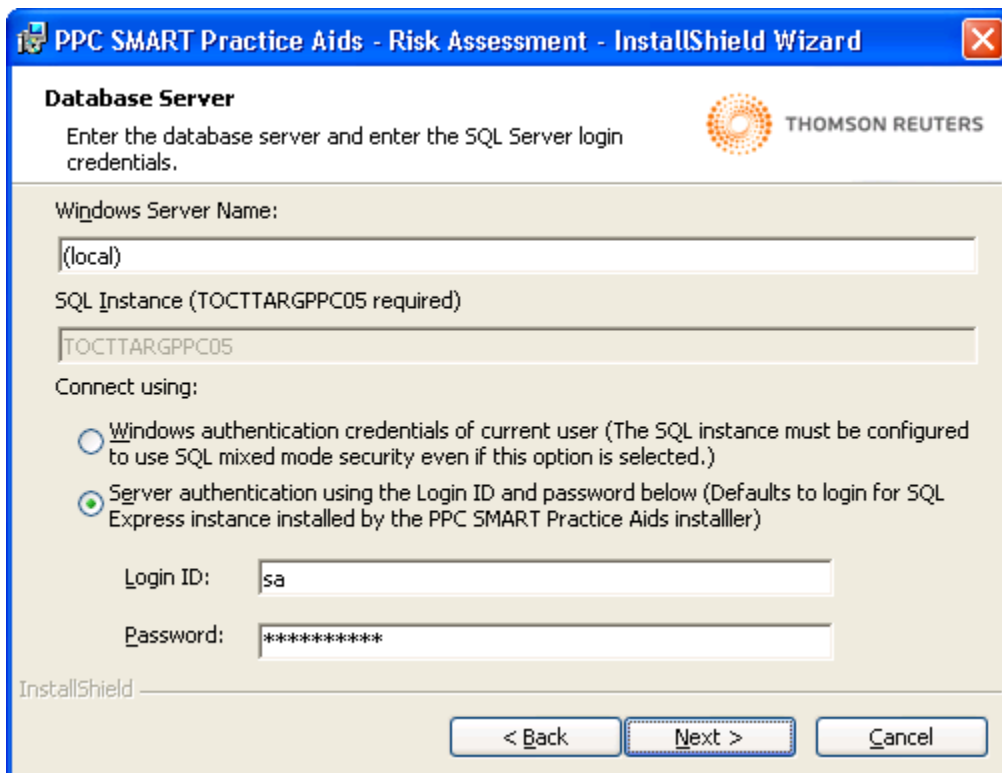


Notice that several screens provide a *Help* feature to give you a better understanding of your options. For example, if you click **Help** next to *Application*, you will see the following explanation:



14. Click **Next** at the bottom of the *Custom Setup Help* screen dialog.

The *Database Server* screen dialog opens, giving you the opportunity to enter the Windows server where the TOCTTARGPPC05 instance is installed and the credentials for this SQL instance.



Database Server

Enter the database server and enter the SQL Server login credentials.

Windows Server Name:
(local)

SQL Instance (TOCTTARGPPC05 required)
TOCTTARGPPC05

Connect using:

- Windows authentication credentials of current user (The SQL instance must be configured to use SQL mixed mode security even if this option is selected.)
- Server authentication using the Login ID and password below (Defaults to login for SQL Express instance installed by the PPC SMART Practice Aids installer)

Login ID: sa

Password: *****

InstallShield

< Back Next > Cancel

The default Windows Server Name is “(local)” and you can change it. If you are running this installation on the Windows Server the SQL instance is installed on (recommended), you do not need to change the Windows Server Name.

The SQL instance name is displayed for informational purposes only and cannot be changed.

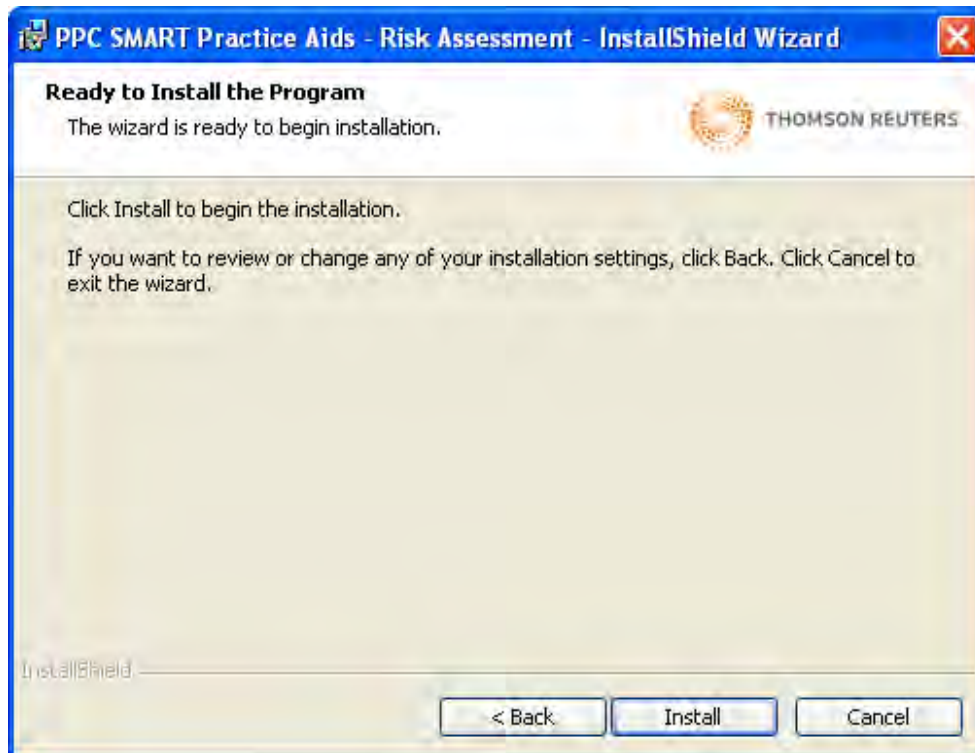
The administrator can use the “**Connect using**” options to specify the login type for the SQL database:

- “Windows authentication...” uses the credentials of the current user.
- “Server authentication using the existing Login ID and password...” is the default and uses the credentials of the SQL Server Express instance for the PPC SMART Practice Aids installer.

Note: By default, the Login ID and password were set up for the SQL Server Express instance installed by the SPA installation. If users have set up their own SQL instance, they will need to change these values. These options are used only to connect to the SQL instance during the installation. The user running the installation can use either mode to connect to the specified SQL instance to configure the database for SPA. However, for the SMART Practice Aids application to connect to the database, the SQL instance must have been setup to use SQL *mixed mode security*.

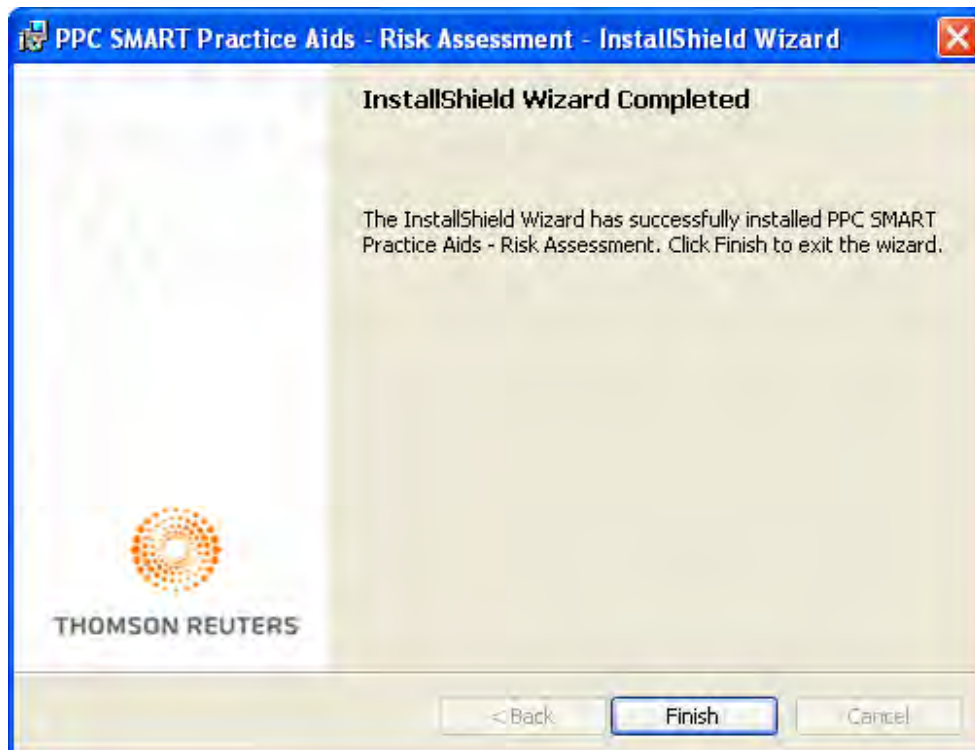
15. Click **Next**.

The *Ready to Install the Program* screen dialog opens:



16. Click **Install** to setup/upgrade the database.

The last screen dialog in the InstallShield Wizard opens:



17. Click **Finish** to end the installation process. You now have a SQL Server Express instance installed on the server that you can use with PPC's SMART Practice Aids application.

Note: Instruct users who already have SMART Practice Aids installed (providing the location of the database) to point to the shared database from the SMART Practice Aids menu: **Tools > Options > Point to Different Database**. Alternatively, during the installation of SMART Practice Aids, you can use the Administrative Install option to configure the shared database.

Installing SQL Server Express to an alternate drive

By default, SQL Server Express will be installed to the local Program Files drive. If, for some reason, you are unable to install to the Program Files drive, you can configure SQL Server Express to be installed to a different drive by following these steps:

Note: The following instructions apply to SQL Server 2008 Express and above. These instructions will not work with earlier versions of SQL Server Express and may not work with other editions of SQL Server.

Run the SQL Express installation file that is downloaded with the application or found on the DVD. We recommend that instead of just running the installation from Windows Explorer, that you run it from a command line with the following parameters. Running the installation from the command line with these parameters will set the defaults for you and run the installation without user interaction.

For a 64-bit Windows OS run SQLEXPRESS_x64_ENU.exe.

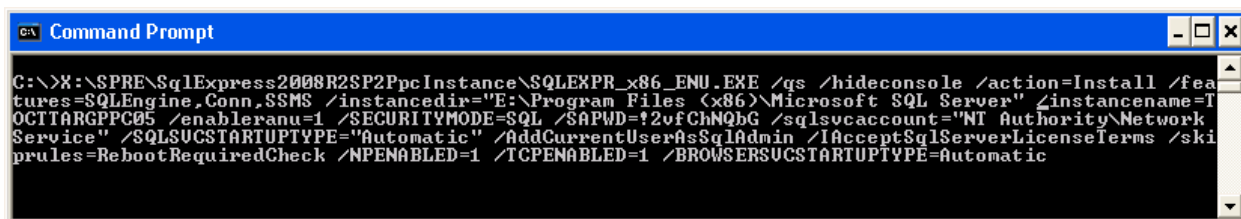
For a 32-bit Windows OS run SQLEXPRESS_x86_ENU.exe. The 32-bit installer may also be run on a 64-bit Windows OS if the 32-bit version is preferred. The following instructions will use the 32-bit SQL Express installation. The 64-bit SQL Express installer can be substituted anywhere the 32-bit installer is used and be sure the target installation folder is for 64-bit applications.

Note: Running the installation with these command line parameters signifies your acceptance of the Microsoft SQL Server Express license agreements.

First Time Installation

```
<path to SQLEXPRESS_x86_ENU.exe> SQLEXPRESS_x86_ENU.exe /qs /hideconsole /action=Install /features=SQLEngine,Conn,SSMS /instancedir="<path to installation folder>" /instancename=TOCTTARGPPC05 /enableranu=1 /SECURITYMODE=SQL /SAPWD=!2vfChNQbG /sqlsvccount="NT Authority\Network Service" /SQLSVCSTARTUPTYPE="Automatic" /AddCurrentUserAsSqlAdmin /IAcceptSqlServerLicenseTerms /skiprules=RebootRequiredCheck /NPENABLED=1 /TCPENABLED=1 /BROWSERSVCSTARTUPTYPE=Automatic
```

For example, if your DVD drive letter is X:, and you are using the DVD, your command line might look like the example below:



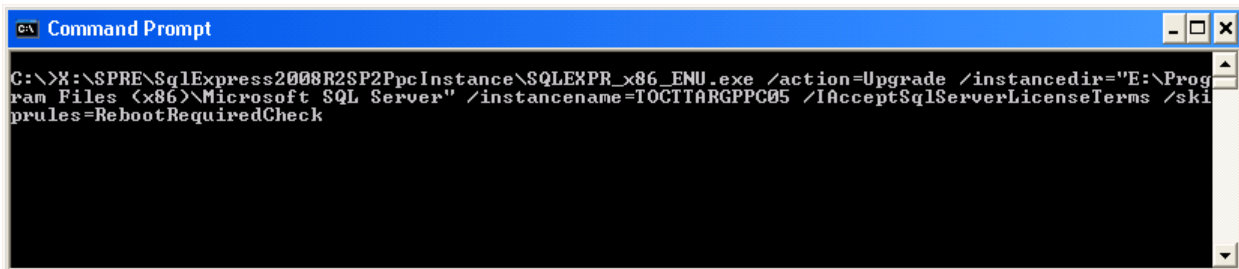
```
Command Prompt
C:\>X:\SPRE\SqlExpress2008R2SP2PpcInstance\SQLEXPRESS_x86_ENU.EXE /qs /hideconsole /action=Install /features=SQLEngine,Conn,SSMS /instancedir="E:\Program Files (x86)\Microsoft SQL Server" /instancename=TOCTTARGPPC05 /enableranu=1 /SECURITYMODE=SQL /SAPWD=!2vfChNQbG /sqlsvccount="NT Authority\Network Service" /SQLSVCSTARTUPTYPE="Automatic" /AddCurrentUserAsSqlAdmin /IAcceptSqlServerLicenseTerms /skiprules=RebootRequiredCheck /NPENABLED=1 /TCPENABLED=1 /BROWSERSVCSTARTUPTYPE=Automatic
```

Note: If you need to allow remote installations and the server on which you installed SQL Server Express has a firewall enabled, such as Windows firewall, you will need to allow network traffic to pass. See [Appendix A](#) for more details.

Upgrade Installation

```
<path to SQLEXPRESS_x86_ENU.exe>\SQLEXPRESS_x86_ENU.exe /action=Upgrade /instancedir="<path to installation folder>" /instancename=TOCTTARGPPC05 /IacceptSqlServerLicenseTerms /skiplrules=RebootRequiredCheck
```

For example, if your DVD drive letter is X:, and you are using the DVD, your command line might look like the example below:



```
Command Prompt
C:\>X:\SPRE\SqlExpress2008R2SP2PpcInstance\SQLEXPRESS_x86_ENU.exe /action=Upgrade /instancedir="E:\Program Files (x86)\Microsoft SQL Server" /instancename=TOCTTARGPPC05 /IacceptSqlServerLicenseTerms /skiplrules=RebootRequiredCheck
```

Other things to keep in mind when upgrading SQL Express.

- When upgrading SQL Express the installer only allows upgrading from x86 to x86 or from x64 to x64. Please be sure to use the appropriate SQL Express installer when performing the upgrade.
- The upgrade installation does not change the location of the SMART Practice Aid databases. If you want to move the databases you will have to do this manually.

Shared databases using an edition of SQL Server other than Express

1. Install a new instance of SQL Server 2008 R2. The new instance must have the following attributes:
 - The instance name must be TOCTTARGPPC05.
 - The instance must use SQL mixed mode security.
2. Once the new SQL Server instance is installed, the SPA database needs to be configured.

On the same server where the new SQL instance was installed, download the Smart Practice Aids – Risk Assessment, Disclosure, Compilation and Review or Audit Essential installation. [See [Download Only \(Web Installer Option\)](#).]

Tip: You can copy a downloaded installation from any machine to run it locally.

3. Browse to the MSI file and double-click it to run it.

For example, if the installation was downloaded from the web, browse to:

```
"C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010\SPRApplication"
```

If you are installing from the DVD, browse to:

```
<disc drive letter>:\SPRE\SPRApplication
```

Note: If the application is already installed when running the MSI file directly, you may receive an error message about another version of the product already being installed. [Appendix A – Upgrades](#) has more detailed information about running the installation when this occurs.

- Continue with step 9 from [Setting up a shared database using SQL Server Express](#).

Note: Instruct users who already have SMART Practice Aids installed (providing the location of the database) to point to the shared database via the SMART Practice Aids menu: **Tools > Options > Point to Different Database**. Alternatively, you can use the Administrative Install option to configure the application to point to the shared database.

Creating an administrative installation point for deploying the application

Without setting up a local database

Note: When using this process, network administrators must deploy .Net 4.0 to the end users' machines. If these prerequisites are not installed, the SMART Practice Aids will not work.

To install a SMART Practice Aids product to a workstation without a local SQL Server Express instance and database, repeat these steps for each of the SMART Practice Aids products:

- Complete the [Download Only option for the PPC Web Installation Wizard](#), or insert the SMART DVD into the drive.

Record/print the download location from the final screen dialog of the PPC Web Installation Wizard. You will need this path in the next step.

The installation files are downloaded to "<My Documents>\Downloads\Thomson\TTA\RG." The installation files for each product are saved to a separate subfolder. For example, the SMART Practice Aids – Risk Assessment installation files are saved to "C:\Documents and Settings\<user ID>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010."

If you are installing from the DVD, the installation files for each product are separate subfolders off the root of the DVD. For example, the SMART Practice Aids – Disclosure installation files are located at "<Disc Drive Letter>\SPDE."

- Browse to the MSI file.

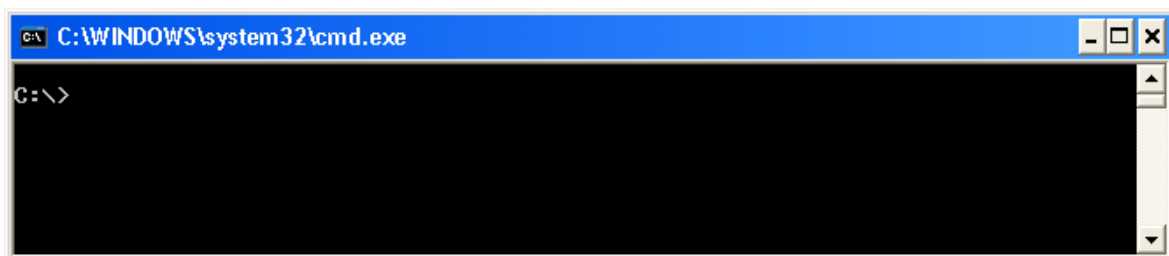
For example, if the installation was downloaded from the web, browse to:

"C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010\SPRApplication"

If you are installing from the DVD, browse to:

<disc drive letter>\SPRE\SPRApplication

- Run the Command Prompt: **Start>Run>CMD**, which opens the following window.



- At the command prompt, type the following:

msiexec /a

- Then type a space and the path to MSI file located in the product folder you opened in step 2. Be sure to include double quotation marks at the beginning and end of the path to the MSI file.

For example:

```
"C:\Documents and Settings\\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010\SPRApplication\PPC SMART Practice Aids - Risk Assessment.msi"
```

Tip: You can also drag MSI file and drop it into the command prompt window instead of typing the full path to the MSI file.

- At this point, the command prompt should look similar to this example:

```
C:\>msiexec /a "C:\Documents and Settings\\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010\SPRApplication\PPC SMART Practice Aids - Risk Assessment.msi"
```

- Press **Enter** to run this set of instructions.
- Click **Next** on the *Welcome* screen dialog for the application installation wizard.
- Accept the license agreement and click **Next**.
- Type the Access Code for the product you want and click **Next**.
- Change the Destination Location if the default is not the installation path you want on the end users' machines and click **Next**.

The *Database Setup* screen dialog opens:

Database Setup
Setup the database and default database connection.

Setup Local Database Help...
Select this option to configure for the first time or upgrade the PPC SMART Practice Aids database on the end user's local database.

Set Available Windows Server(s) Help...
Enter the Windows server names with a TOCTTAR.GPPC05 SQL instance available to the PPC SMART Practice Aids (separate multiple servers by commas)

ServerName1

Set Default Windows Server Help...
Set the default database connection from one of the servers above.

ServerName1

InstallShield

< Back Next > Cancel

- Uncheck the first option (**Setup Local Database**).

13. Check the second option [**Set Available Windows Server(s)**], and replace “(local)” with the name of the server on which the SMART Practice Aids database resides. (See [Setting Up a Shared Database](#).)
14. Check the third option (**Set Default Windows Server**) and also type the server name as the default Windows server.

Note: Setting up the default is good only for a new installation. If a user already has other servers installed and has defined a default, this installation will not overwrite their default but will add the server to their list, as needed.

15. Click **Next**.

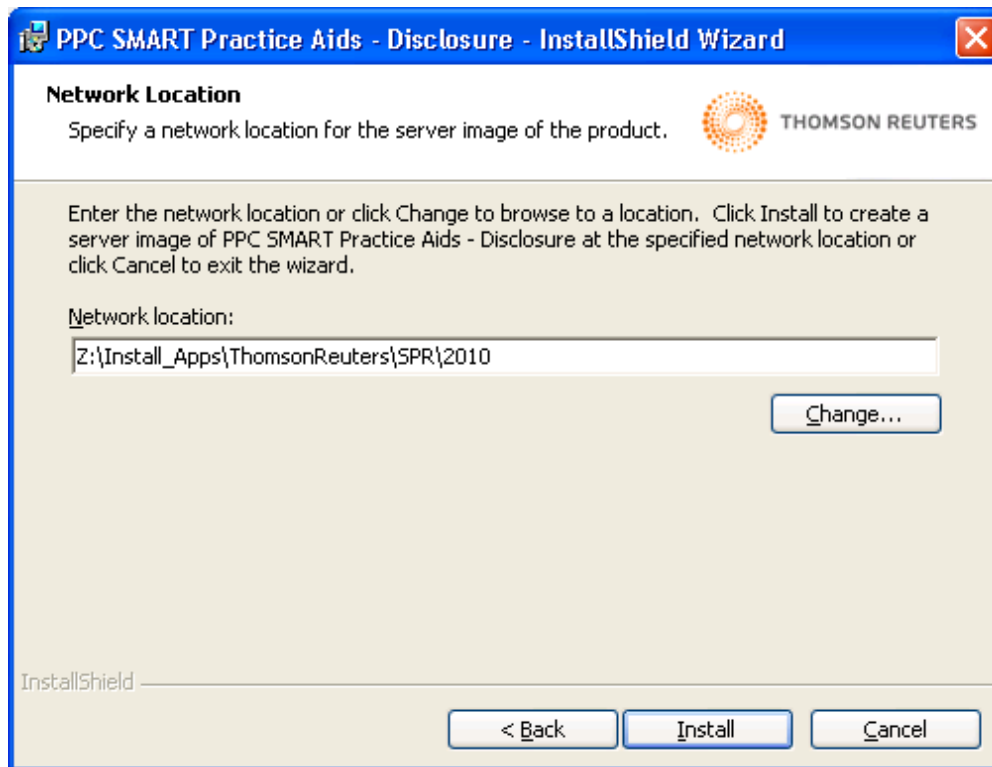
If SMART Practice Aids – Disclosure is being installed, the *Firm Library Database Setup* screen dialog will open. For other products, proceed to step 16.

Firms have the option to use a separate database for their firm library of disclosure notes, or they can utilize the same (engagement) database. Installation is the same process, however, if you want to install a separate database for the firm library on a different server. (See [Setting Up a Shared Database](#).)

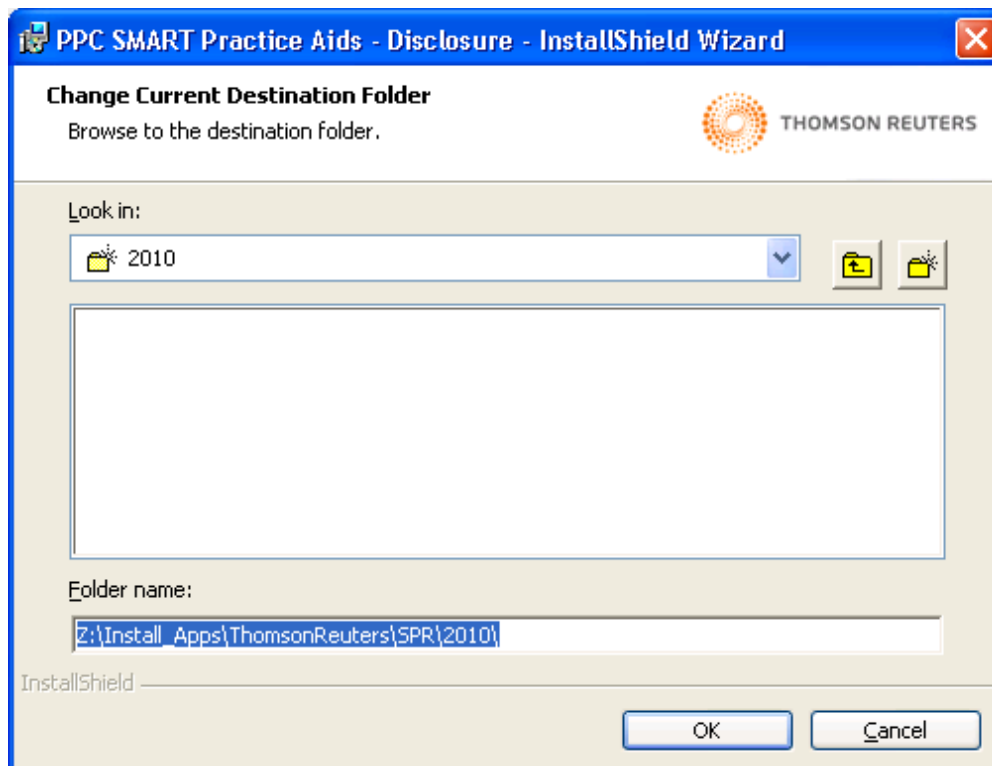
The screenshot shows a dialog box titled "PPC SMART Practice Aids - Disclosure - InstallShield Wizard". The main heading is "Firm Library Database Setup" with the Thomson Reuters logo. Below the heading, it says "Setup the default database connection for the Firm Library." The text explains that the Firm Library data can be stored in the same database as the PPC SMART Practice Aids engagements or a separate database. There are two options, both unchecked: "Set Available Firm Library Windows Server(s)" and "Set Default Firm Library Windows Server". Each option has a "Help..." button and a text input field labeled "ServerName1". The "Set Default Firm Library Windows Server" option is highlighted with a dashed border. At the bottom, there are "Back", "Next >", and "Cancel" buttons.

Leave both options unchecked to use the same databases established for engagement data on the previous screen.(Unchecked, servers are listed, but they are grayed out on this screen.) To configure the user's SMART Practice Aids application to use a separate database for Firm Library, check the options and designate the appropriate server.

- Click **Next** to open the *Network Location* screen dialog to identify the destination folder for the administrative installation.



- Click the **Change** button to go to the *Change Current Destination Folder* screen dialog:



- In the **Folder Name** field, type the location on the network where you want the administrative installation point stored.

19. Click **OK**.
20. Click **Install** to install the SMART Practice Aids product.
21. Click **Finish** to close the installation wizard.

The administrative installation point can now be used to deploy SMART Practice Aids to the end users' workstations. [See [Deploying the Application Only \(No Local Database\)](#) for details.]

Including setting up a local database

To create an administrative installation point (AIP) and configure the workstation installation to connect to shared databases and setup a local database, perform the following steps:

1. Complete the [Download Only option for the PPC Web Installation Wizard](#), or insert the SMART DVD into the drive.

Record/ print the download location on the final screen dialog of the PPC Web Installation Wizard. You will need this path in the next step.

The installation files are downloaded to "<My Documents>\Downloads\Thomson\TTA\RG." The installation files for each product are saved to a separate subfolder. For example, the SMART Practice Aids – Risk Assessment installation files are saved to "C:\Documents and Settings\<user ID>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010."

If you are installing from the DVD, the installation files for each product are separate subfolders off the root of the DVD. For example, the SMART Practice Aids – Disclosure installation files are located at "<Disc Drive Letter>:\SPDE."

2. Browse to the product installation folder.

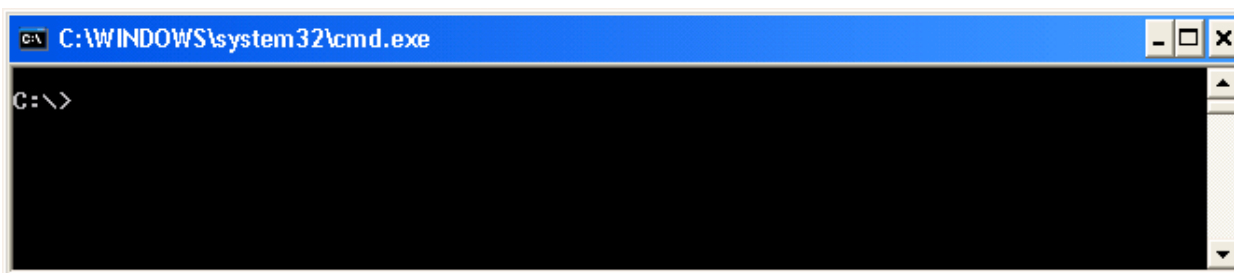
For example, if the installation was downloaded from the web, browse to:

"C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010"

If you are installing from the DVD, browse to:

<disc drive letter>:\SPRE

3. Run the Command Prompt: **Start>Run>CMD**, which opens the following window.



4. At the command prompt, type the path to setup.exe, located in the product folder you opened in step 2. Be sure to include double quotation marks at the beginning and end of the path to setup.exe.

For example:

C:\>"C:\Documents and Settings\<user name>\My Documents\Downloads\Thomson\TTA\RG\SPRE\2010\setup.exe"

Tip: You can also drag setup.exe and drop it into the command prompt window instead of typing the full path to setup.exe.

5. Then type the **/s** command line parameter and the path to the shared downloads folder. Be sure to include double quotation marks at the beginning and end of the path to the shared downloads folder. Installation files that are shared between products are downloaded to the shared downloads folder. The path to the shared downloads folder is:

C:\Documents and Settings\

Your command should now resemble:

```
C:\>"C:\Documents and Settings\
```

Tip: After typing " /s:" at the command prompt, you can drag the shared folder and drop it into the command prompt window instead of typing the full path to the shared folder.

Note: When installing from the DVD, the /s parameter is **not** needed.

6. Add **/a:**" to run the bootstrapper in administrative mode.

Your command should be similar to this:

```
C:\>"C:\Documents and Settings\
```

7. Then add **/aip:<path to Administrative Installation Point>** to set the AIP base path, that is, the path to the folder where the administrative installation point is to be stored.

Your command should be similar to this:

```
C:\>"C:\Documents and Settings\
```

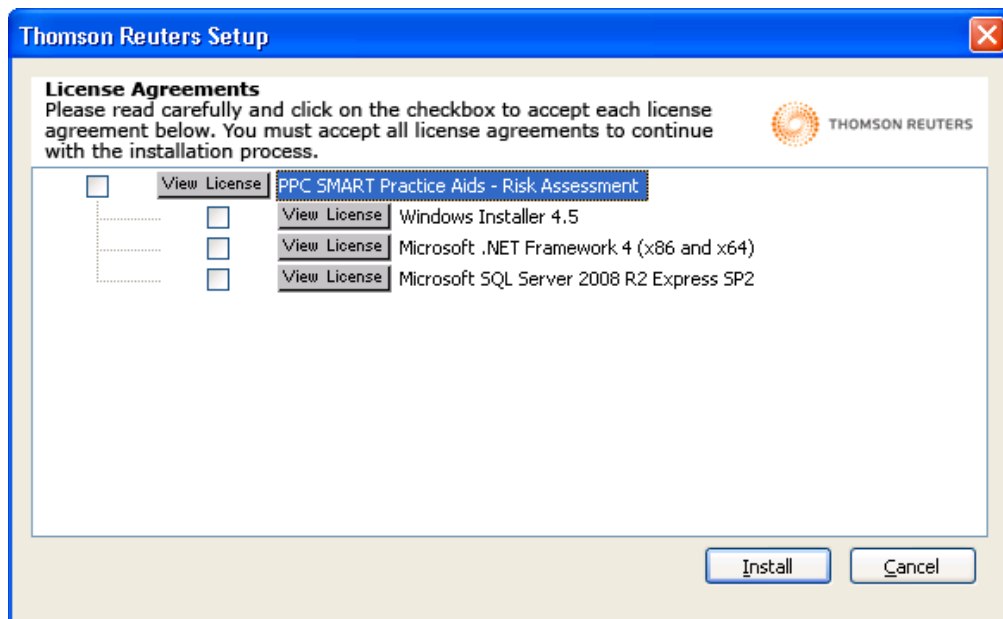
8. Add **/save**, which gives you the option to save settings passed on the command line. This is necessary to save the shared download path to the INI file for later use. When running an administrative installation (/a), this will also set AdminPackage=true in the INI file saved to the /aip path.

Your command should be similar to this:

```
C:\>"C:\Documents and Settings\
```

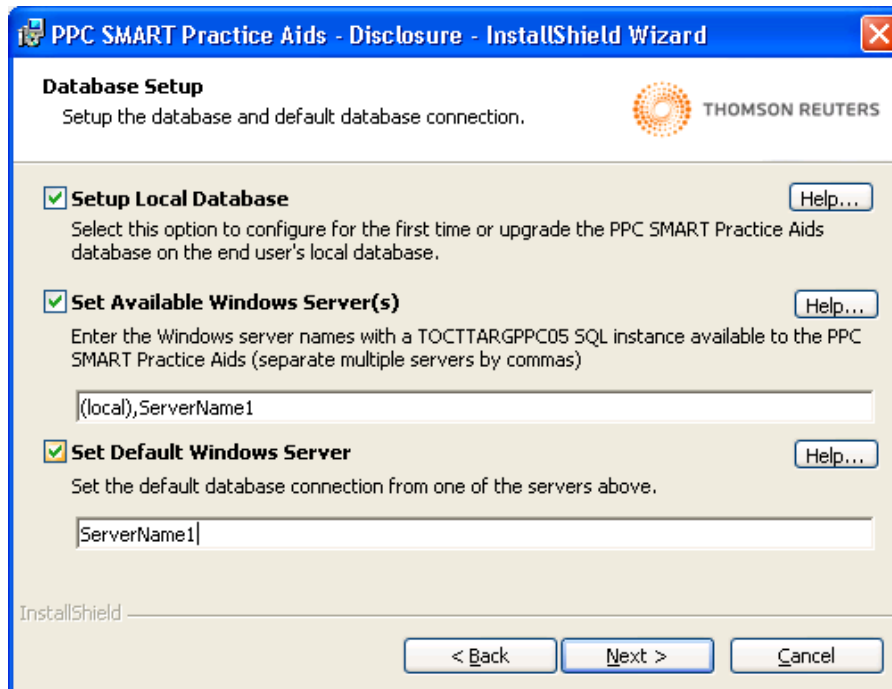
9. Press Enter to run this set of instructions.

10. On the *License Agreements* screen dialog, accept the licenses for all products/prerequisites (based on the machine the products are installed on).



11. Click the **Install** button.
12. Click **Next** on the *Install Shield Wizard Welcome* screen dialog.
13. Click **Next** on the *Welcome* screen dialog for the application installation wizard.
14. Accept the license agreement and click **Next**.
15. Type the Access Code for the product you want and click **Next**.
16. Change the Destination Location if the default is not the installation path you want on the end user's machines and click **Next**.

The *Database Setup* screen dialog opens:



17. Leave the first option checked: **Setup Local Database**.
18. Check the second option (**Set Available Windows Server(s)**), and add the name of the server on which the SMART Practice Aids database resides. (See [Setting Up a Shared Database](#).)

The server names should be separated by commas. For example:

(local),ServerName1

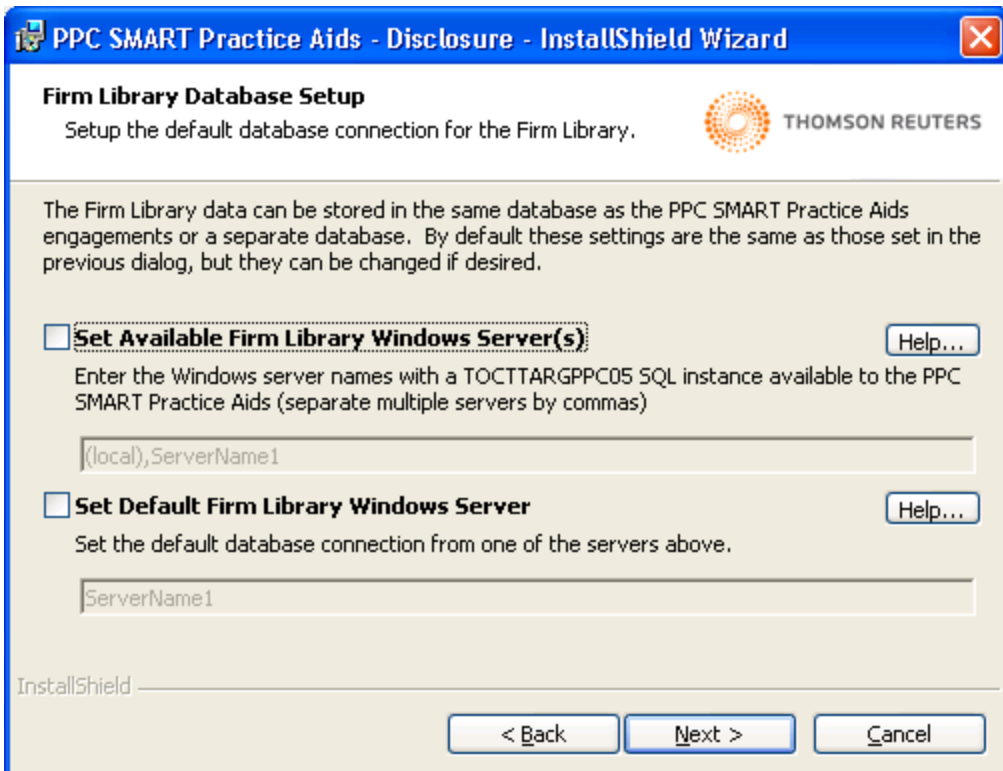
19. Check the third option (**Set Default Windows Server**) and also type the server name as the default Windows server.

Note: Setting up the default is good only for a brand new installation. If a user already has other servers installed and has defined a default, this installation will not overwrite their default, but will add the server to their list as needed.

20. Click **Next**.

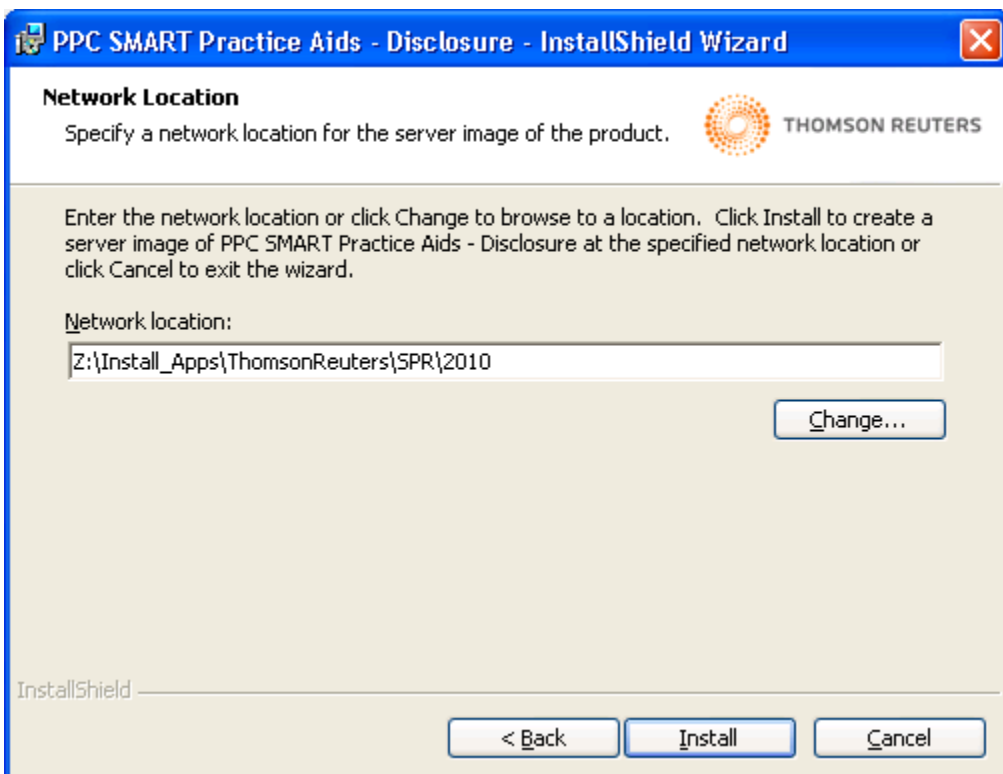
If SMART Practice Aids – Disclosure is being installed, the *Firm Library Database Setup* screen dialog will open. For other products, proceed to step **21**.

Firms have the option to use a separate database for their firm library of disclosure notes, or they can utilize the same (engagement) database. Installation is the same process. However, if you want to install a separate database for the firm library on a different server, see [Setting Up a Shared Database](#).

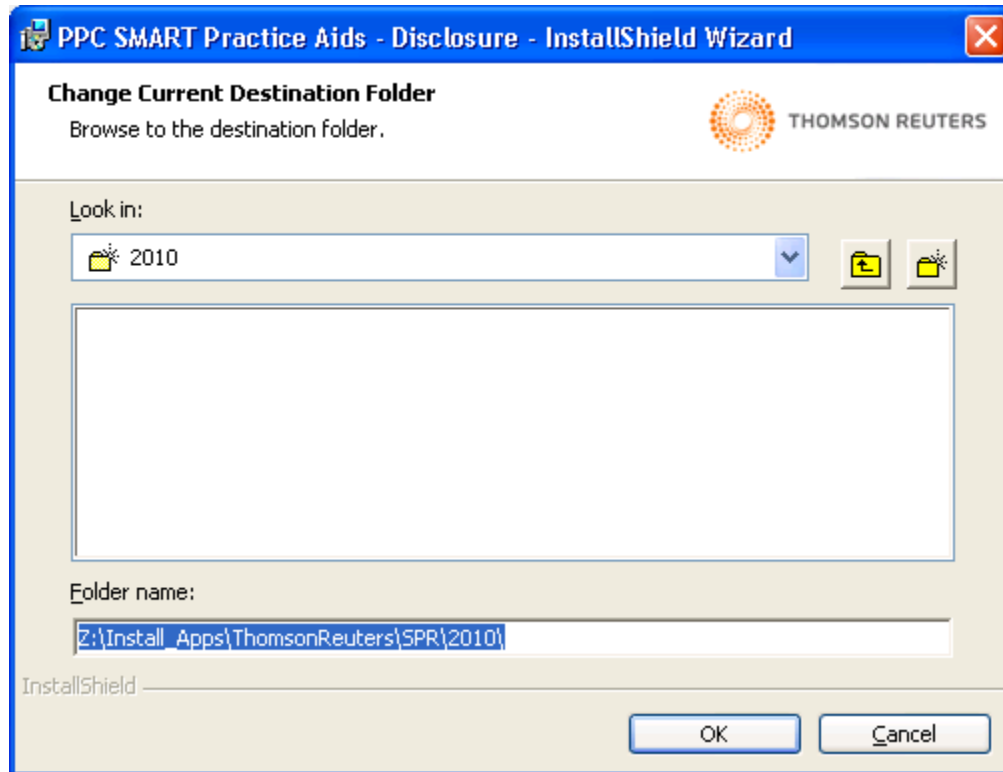


Leave both options unchecked to use the same databases established for engagement data on the previous screen. (Unchecked, servers are listed, but they are grayed out on this screen.) To configure the user's SMART Practice Aids application to use a separate database for Firm Library, check the options and designate the appropriate server.

21. Click **Next** to open the *Network Location* screen dialog to identify the destination folder for the administrative installation.



22. Click the **Change** button to go to the *Change Current Destination Folder* screen dialog:



23. In the **Folder Name** field, type the location on the network where you want the administrative installation point stored.

24. Click **OK**.

25. Click **Install** to install the SMART Practice Aids product.

26. Click **Finish** to close the installation wizard.

The administrative installation point can now be used to deploy SMART Practice Aids to the end users' workstations. (See [Appendix A - Deploying the Application to the End User.](#))

Download only (Web installer option)

Intended for advanced users, the **Download Only** option downloads the installation files for SMART Practice Aids to your computer for use with more advanced installation options.

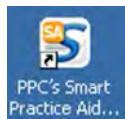
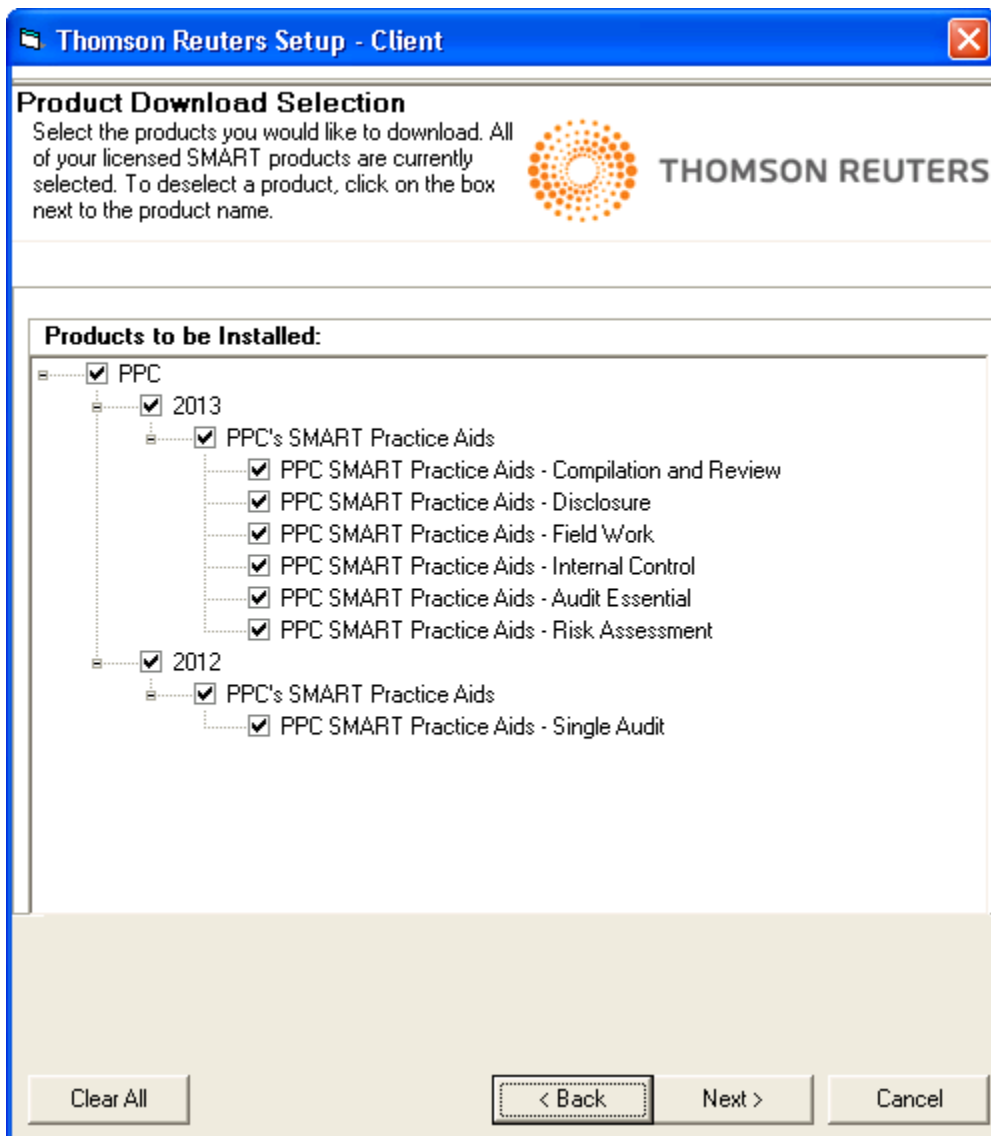
For a Downloads Only installation, perform the following steps:

1. Close all open programs, including any virus detection programs.
2. Start the [PPC Web Installation Wizard](#).
3. The *Welcome to the Product Install Wizard* screen dialog will prompt you to select an installation type (Install to Local Machine, Administrative Install, or Download Only). Your Checkpoint account number (if applicable) defaults in the appropriate field.

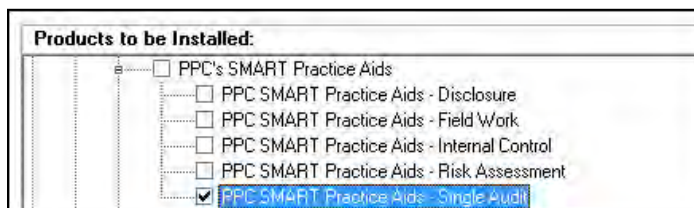


The **Download Only** option is intended for advanced users who want to configure the application installations for SMART Practice Aids. It saves the installation files to the default download location so an administrative user can configure an advanced installation of the database, administrative installation point, and/or workstation installs.

4. Click **Next** to display the *Product Download Selection* screen dialog.



PPC's SMART Practice Aids® – Single Audit. An additional database (named *SPS*) is available for storing your single audit engagements:



This comprehensive technology application walks you through the entire *Single Audit* process. You will be able to use this automated solution to reduce errors and to comply with increased complexity, more frequently changing rules, and an increased number of major programs in existing single audits.

Only SMART Practice Aids products will be listed on the *Product Selection* screen dialog because they are the only products currently available for Download Only.

5. Select the products you want to download.
6. Click **Next** to display the *Product Install Locations* screen dialog.

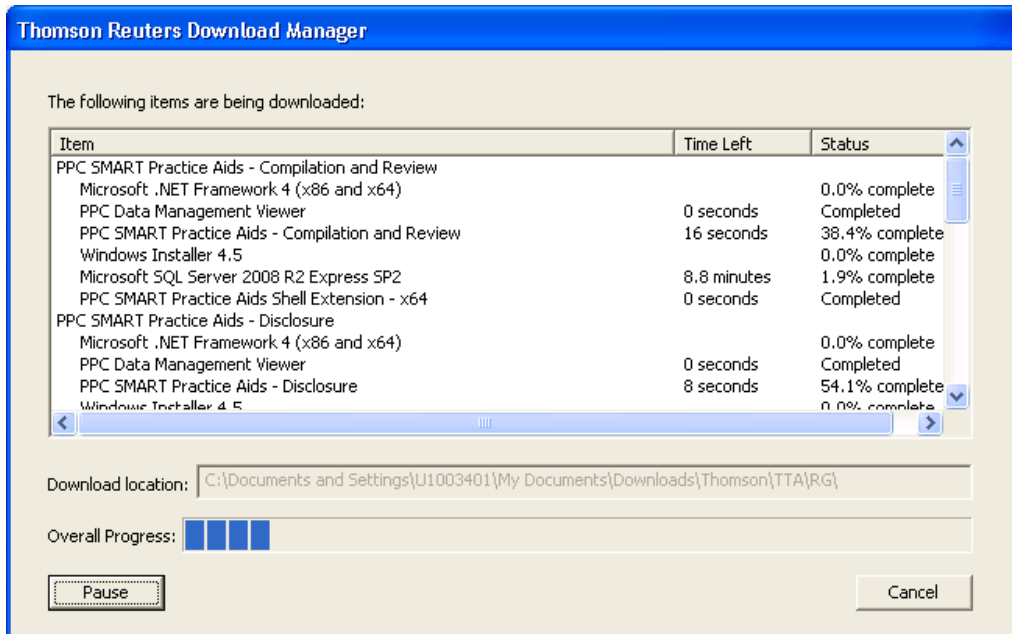
The screenshot shows a Windows-style dialog box titled "Thomson Reuters Setup". The main heading is "Product Install Locations" with a sub-instruction: "Confirm the installation paths below and select next when ready to install." The Thomson Reuters logo is in the top right. The dialog contains several sections, each with a text input field and a "Browse..." button:

- Administrative Install Location:** The input field is empty.
- Checkpoint Tools Template Folder:** The input field contains "C:\Program Files\Common Files\PPC\Templates".
- Smart Practice Aids Install Locations:** The input field contains "C:\Program Files\PPC\Smart Practice Aids".
- Smart Practice Aids - Single Audit Install Location:** The input field contains "C:\Program Files\PPC\Smart Practice Aids - Single Audit".
- Installation Download Location:** The input field contains "C:\Documents and Settings\U1003401\My Documents\Downloads\Thomson\TTA\RG\".

A **Hint:** section states: "ProSystem fx® Engagement users, change the location as needed for your installation of ProSystem fx® Engagement. For more information, refer to the installation instructions." At the bottom, a message reads: "Message: Another PPC SMART Practice Aids module has already been installed. All PPC SMART Practice Aids modules must be installed to the same folder, therefore this path cannot be changed." Navigation buttons include "< Back", "Next >", and "Cancel".

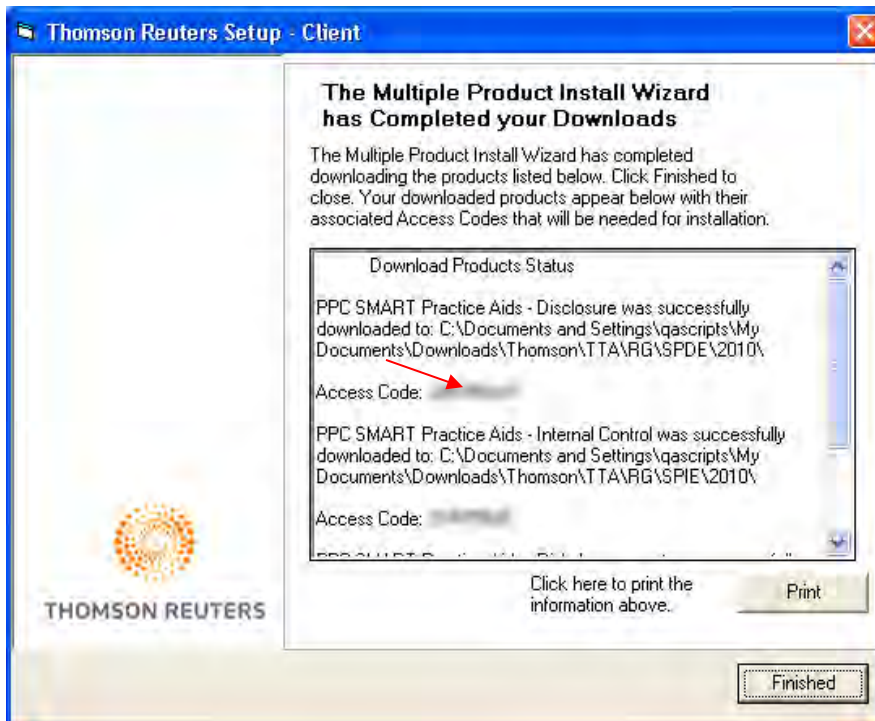
7. Use the default Installation Download Location or change it to your desired download location.

8. Click **Next** to start the download.



The Thomson Reuters Download Manager shows you the progress of the downloads.

9. When all products have finished downloading, the *Download Products Status* screen dialog will be displayed:



Notice above that the *Download Products Status* screen dialog displays the paths to the downloaded products and also displays the access code for each product.

IMPORTANT! You will need to enter these access codes later to complete the Client/Server installation. Write them down now or click **Print** to capture all of the access codes!

10. Select the **Print** option to print the download status information.

11. Select **Finished** to complete the download process.

Default path for product downloads:

C:\Documents and Settings\\My Documents\Downloads\Thomson\TTA\RG

Subfolders will be created under the download location for each product selected.

APPENDIX A – Deploying the application to the end user

Now that you have set up your administrative installation points using the following options, you are ready to deploy the application to the end user machines.

- [Without setting up a local database](#)
- [Including setting up a local database](#)

Important! As the network administrator, you must ensure that all prerequisites are installed on the end user machine! All prerequisites are available on the DVD and in the download location when doing a Web installation and choosing the “Administrative Install” or “Download Only” options.

Note: The bootstrapper (setup.exe) will automatically install all prerequisites. (At this time, you cannot use the bootstrapper to selectively install prerequisites.)

In either of the scenarios below, you will have the option to push the installation out by using Active Directory/Group Policy, SMS, batch scripting, etc., or provide instructions to your end users to run or pull the installation themselves. The option you use to deploy SMART Practice Aids will depend on your environment and the prerequisites that need to be installed. Prerequisites need to be installed if the application is installed for the first time or the prerequisites have been added or updated.

Option 1: Use a start-up or logon script that can be delivered through an Active Directory group policy OR other deployment tools such as Microsoft System Center: This option will typically be used when prerequisites need to be installed on the end user’s PC.

- Installs all pre-requisites as well as the application.
- Can be installed from either a 64-bit or 32-bit deployment server.
- Once configured, the script executes when the machine is started or at user logon to install the pre-requisites as well as the application.
- Using a logon script requires users to have admin rights to their local machines.

Tip: A [sample script](#) is available on the support site.

Option 2: Install only the application MSI file through an Active Directory group policy: This option can be used when all prerequisites are already installed on the end-user's PC and only the application needs to be installed. If you are deploying the application without setting up a local database you may also use this option if Windows Installer 3.1 (or greater) and .NET 4.0 (OR greater) are already installed on the end-user's PC

- Installs only the application (assumption is all pre-requisites are installed).
- Can be configured to execute at user logon or re-boot.
- Does not require users to have admin rights to their local machines.

Option 3: You can instruct your end users to install directly from the administrative installation point (AIP).

- Installs all pre-requisites as well as the application.
- Using a logon script requires users to have admin rights to their local machines.

Instructions

1. Browse to the network administrative install point
 - a) Run the bootstrapper (setup.exe) directly if available (Internal Control and Field Work do not have bootstrappers)
 - b) If a bootstrapper (setup.exe) is not available double-click the MSI files to run the installation.
2. Click **Next** on the Install Shield Wizard *Welcome* screen dialog.
3. Accept the license agreement and click **Next**.
4. Click **Next** on the *Access Code* screen dialog. The access code will be pre-populated when running from an administrative installation point.
5. On the *Setup Type* screen dialog, leave the default value **Complete** and click **Next**.
6. Click **Next** on the *Destination Folder* screen dialog.
7. Click **Install** on the *Ready to Install the Program* screen dialog.
8. Click **Finish** on the *Install Shield Wizard Completed* screen dialog.

Tip: If you would like your users to run the installation without any user interaction, you can create a shortcut with the following command line parameters. When your end users launch the installation from the shortcut, they will see the progress of the installation, but they will not have to respond to anything.

- Bootstrapper (setup.exe) Sample Command Line:
- "**<path to AIP folder>\setup.exe**" /accept /qp:b /qa:b
- MSI Sample Command Line:

msiexec /i "<path to AIP folder>\SPRApplication\PPC SMART Practice Aids - Risk Assessment.msi" /qb

Note: If the application is already installed when running the MSI file directly, you may receive an error message about another version of the product already being installed. [Appendix B – Upgrades](#) has more detailed information about installing the application when this occurs.

When installing updates to the client workstation, either:

- Create a new administrative installation point for the product updates. (You do not have to uninstall the product on the client workstation.) RECOMMENDED: Mark the updates as *upgrades of existing deployments* in the Active Directory Group Policy settings.
- OR -
- Use an updated administrative installation point on a network share. (Product upgrades may require access to the original product installation source. Therefore, if you have updated the original administrative installation point, you may first need to uninstall the product on the client workstation before deploying.)

APPENDIX B – Upgrades

If an installation is an MSI file and it is a **minor** upgrade to a version users already have installed, they must specify certain command line parameters if they are running the MSI file directly. If an MSI is a **major** upgrade, however, then they can run the MSI directly without any command line parameters. This is not an issue when running setup.exe or when running the installations from the Web or DVD multi-product installers.

The command line for installing a minor upgrade is as follows:

```
msiexec.exe /i "<path to MSI file>" REINSTALL="ALL" REINSTALLMODE="voums"
```

Example:

```
msiexec.exe /i "D:\SPRE\SPRApplication\PPC SMART Practice Aids - Risk Assessment.msi"  
REINSTALL="ALL" REINSTALLMODE="voums"
```

Tip: A shortcut can be created with this command line so you don't have to repeatedly enter this command line to upgrade multiple machines. This is also helpful when instructing your end user to install the application since all they need to do is run the shortcut.

There is no hard rule about when an installation will be a minor upgrade versus a major upgrade. If a user runs the MSI directly without the command line options above and it is a minor upgrade, they will get the following error message:



This same error message will be displayed if the version they are trying to install is older than the version already installed if the differences between the two versions are considered minor by Windows Installer definition.

Conveying minor upgrades to the user can be confusing because they apply only to certain versions of the application. If a user has an even older version, then the installation will be a major upgrade. In other words, the installation will function as a minor or major upgrade, depending on the version of the software that is currently installed on the end user's machine.

APPENDIX C – Resources

See [PPC's SMART Practice Aids support](#) webpage.

