



PROFESSIONAL EDUCATION CENTER
USER'S GUIDE ACCOUNTING & FINANCE EDITION

Document version 1.3
Updated April 30, 2009

[SmartPros Ltd.](#) | Skyline Drive | Hawthorne, NY 10532 | info@smartpros.com
ph - 914.345.2620 | fax - 914.345.2603

© 2009 SmartPros Ltd.

TABLE OF CONTENTS

BASIC NAVIGATION	3
GETTING STARTED.....	3
STUDENT ACCOUNT	4
CREATING A STUDENT ACCOUNT	4
LOGGING IN	4
UPDATING YOUR STUDENT ACCOUNT PROFILE.....	4
FORGOTTEN PASSWORDS	5
MY COURSES	6
COURSE FUNCTIONS	7
<i>Courses in Progress</i>	7
<i>Completed Courses</i>	8
<i>Course History</i>	9
<i>External Course Journal</i>	9
<i>Launching Courses</i>	9
PURCHASING AND ENROLLING	10
BUYING A SUBSCRIPTION.....	10
BUYING AN INDIVIDUAL COURSE	11
COURSES & CATALOGS	13
ENROLLING IN AND BROWSING COURSES	13
<i>Catalog View Page</i>	14
PRODUCT LINES AND CATALOGS	14
ADDITIONAL FEATURES	15
PRETEST COURSES	15
CHECK YOUR SYSTEM	15
HELP	15

Basic Navigation

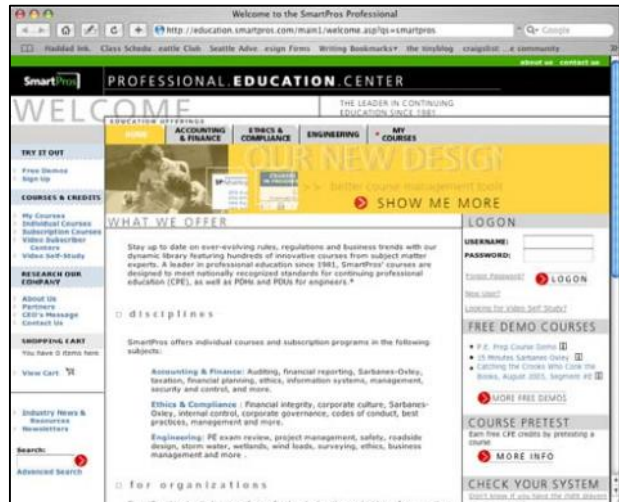
The Home Page

The Home page is your portal to all SmartPros courses and features. From here you can access courses in various disciplines.

You can return to the home page at any time by clicking the Home tab located near the upper left of your browser window.

Browsing Courses by Library

Along the top of the *Home* page you'll find tabs for each of SmartPros' content libraries. We'll focus on the **Accounting and Finance** content library in this user's guide.



Subscriptions

Clicking the **Subscriptions** tab brings you to a list of our course libraries for purchase. Subscriptions grant you access to a related group of courses for a period of one year. They are not available for all products. If the **Subscriptions** tab is not visible, there are no subscriptions available for purchase from your PEC.

My Courses Tab

Once logged in, you can manage your student account as well as current and past SmartPros courses from the **My Courses** tab.

Getting Started

To get started with the *Accounting & Finance* edition of the Professional Education Center (PEC), choose the **Accounting & Finance** tab located at the top of the main screen. Clicking this tab puts the PEC into *Accounting & Finance* mode.



Student Account

Creating a Student Account

To create a student account:

- Click the REGISTER NOW button located on the HOME tab.
- Fill in the requested information on the Profile page.
Note: You must fill in information marked by a red asterisk.

Logging In

You can log in to the PEC:

- At the top right of the *Home* page
- From the *My Courses* Page

Enter your username and password to login to the PEC. Once you've logged in, your name will appear near the top of the screen.



Updating Your Student Account Profile

To edit or update your student account profile once you are logged in:

- Click the **Update Profile** link located under your name at the top of the screen.



From the *Update Profile* page you can edit your:

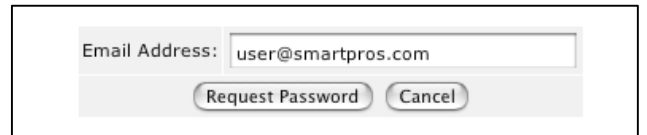
- Name
- Address Information
- Phone Number
- Newsletter Subscriptions
- Fax Number
- Email Address
- Password

Note: Fields marked with a red asterisk must be filled in.

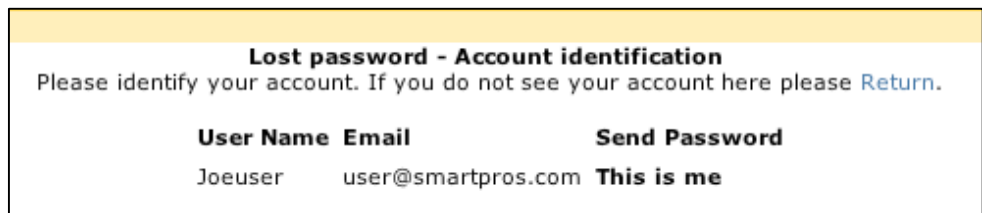
Forgotten Passwords

To retrieve a lost or forgotten password:

- Click on the **Forgot Password?** link from either the *My Courses* page or in the upper right corner of the *Home* page in the Logon box.
- Enter your email address. Make sure to enter the email address that you used when registering with SmartPros.
- You'll be presented with the usernames associated with the requested email address. If the username is yours then click the **This is Me** link. Your password will immediately be emailed to you.



Email Address:



Lost password - Account identification
Please identify your account. If you do not see your account here please [Return](#).

User Name	Email	Send Password
Joeuser	user@smartpros.com	This is me

- If you do not see your username, click the **Return** link. This will bring you back to the enter email page.

My Courses

Manage your student account, as well as current and past SmartPros courses from the **My Courses** tab. The below listed **My Courses** areas are available when you have logged into the PEC.

Course and Credit Summary

Found at the top of the *My Courses* area, the *Course and Credit Summary* is intended to give you a quick summary of your progress in the SmartPros system.

COURSE AND CREDIT SUMMARY	
<input checked="" type="checkbox"/> MY COMPLETED CREDITS PEC Credits: 0 External Credits: 0 Current Credit Total: 0	<input checked="" type="checkbox"/> MY AVAILABLE CREDITS Free Courses: 0 Free Pretest Courses: 10 Registered (Available) Course Credits 0
<input type="checkbox"/> MY SUBSCRIPTIONS Financial Integrity Suite (with FMN) (Expires: 7/15/2005)	<input type="text"/> <input type="button" value="SUBMIT"/>

My Completed Credits

- PEC Credits: indicates the number of courses you have earned through SmartPros Courses.
- External Credit: indicates the number of credits you have entered into the *External Course Journal*.
- Current Credit Total: Indicates the total number of credits earned from both PEC and external sources.

My Available Credits

- Free Pretest Courses: Indicates the number of Free and Pretest credits you have available. Pretest courses are considered candidates for earning free credits and must undergo testing before being made available for credit.

My Subscriptions

Available subscriptions assigned to your account are listed in this section. Once your subscription has expired, your subscription is no longer valid and must be renewed in order to access any courses in your account. Courses in your **Course History** or **Completed Courses** and all certificates will be available after your subscription expires.

Promotional/Billing Codes

If you have been assigned a promotional/billing code, please enter it in this field. If you have not been assigned a code, you may ignore this section.

My Newsletters

Any newsletters you have subscribed to on the *My Profile* page will be listed in this section. Newsletters can be added or deleted by clicking **View Options** in the newsletters section or by clicking **Update Profile** at the top of the screen under your name.

Course Functions

Located below the **Course and Credit Summary**, the tabs across the top middle of **My Courses** (see picture below) navigate the course functions tools. Clicking on the tabs where indicated will take you to each section.



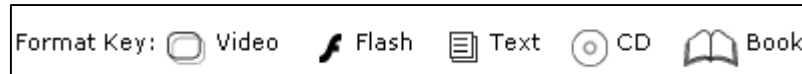
Courses in Progress


The *Courses In Progress* tab gives you access to all courses for which you are currently enrolled. The list of courses will appear immediately below the navigation tabs.

Formats	Catalog Number	Course Title (Subs. Brand)	Expiration Date	Credits	Current Status	
<input type="checkbox"/> <input checked="" type="radio"/>	998034	Partnership Taxation I(ISDN or higher-video)(56k and lower-audio) (SPA)  (8)	5.09.05	1.00	Passed	
(1)	(2)	(3)	(4)	(5)	(6)	(7)





The above columns are defined as:


1. Remove course checkbox: See above for how to remove courses.
2. Formats: Indicate the type of course in your order. Refer to the Format Key below for more information.




3. Catalog number: The catalog number of your course.
4. Course Title: The title of your course.
5. Expiration Date: The date at which the course will expire and can no longer be used. This date is the earlier of either the course's expiration date or your subscription's expiration date (if applicable.)
6. Credits: The number of credits that can be earned by completing this course.
7. Status: The current status of the course.
8. Course detail icon (): Click the Course Detail Icon to view details of the course, such as the author and full description.

Removing Enrolled Courses

COURSES IN PROGRESS		COMPLETED COURSES	COURSE HISTORY	EXTERNAL COURSE JOURNAL	Expiration Date	Current Credits	Status
Formats	Catalog Number	Course Title (Subs. Brand)					
<input checked="" type="checkbox"/>		991004	Travel, Entertainment, Gift, and Car Expenses (SPA)		Jul 15, 2005	6.00	Paid
<input type="checkbox"/>		998646	CPAR GOV/NFP - Vol. 2003 - No. 4 - A - Improving Audit Quality - The First Steps (CPAR)		Jul 15, 2005	2.00	Paid

(Click  to view detail)

 REMOVE CHECKED COURSES


To remove a course you've enrolled in from your student account:

- Check the remove course checkbox
- Click the REMOVE CHECKED COURSES button.

Note: Removing a course from your account is permanent. You may enroll in the course again, but you will be required to start again from the beginning. If you purchased an individual course by credit card (as opposed to purchasing a subscription), you will not be able to remove the course and get a credit, unless you are within the 30-day purchase period.

Completed Courses

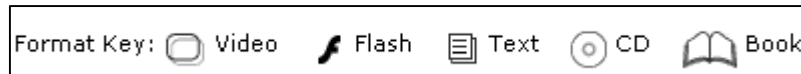
This section lists courses you have successfully completed, as well as the details of each course. If you wish to obtain one, course certificates are available in this section.


Formats	Catalog Number	Course Title (Subs. Brand)			Credits	Status	Completion	Score
<input type="checkbox"/>		999052	Communications Technology Terms and Options (SPA)	 ⁽⁹⁾ (view certificate) ⁽¹⁰⁾	1.00	Passed	Jan 1 2004 12:00AM	100%

(1) (2) (3) (4) (5) (6) (7) (8)

Columns are defined as:

1. Move to history checkbox: Used to move a completed course to the *Course History* section.
2. Formats: Indicate the type of course in your order. Refer to the Format Key below for more information.



3. Catalog number: The catalog number of your course.
4. Course Title: The title of your course.
5. Credits: The number of credits that can be earned by completing this course.
6. Status: The current status of the course.
7. Completion: The date the course was completed.
8. Score: Your final score after completing the final exam for the course.
9. Course detail icon (): Click the Course Detail Icon to view details of the course, such as the author and full description.
10. View Certificate: If you have earned a certificate for your course, you can view it here.

Certificates of Completion

To view a specific certificate of completion for an enrollment:

- Click the *View Certificate* link
- Click the VIEW CERTIFICATE FOR PRINT button.

Moving a Completed Course to Course History

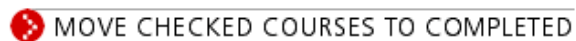
To move a course from *Completed Courses* to *Course History*, select the move to history checkbox and click the MOVE CHECKED COURSES TO HISTORY button.

Course History

The *Course History* tab is meant to archive courses you have already completed, but no longer wish to list in the *Completed Courses* section. For example, you may wish to store courses here for which you have already reported your CPE credit. Courses listed in the *Course History* are otherwise exactly the same as courses listed in the *Completed Courses* Section.

To move courses back to the *Completed Courses* section:

- Check the box to the left of the course title and then click the MOVE CHECKED COURSES TO COMPLETED button.



External Course Journal

The *External Course Journal* tab is intended to keep record of any courses you have passed from sources *outside* the SmartPros system. You may wish to list credits earned from seminars or classroom courses. This section is intended for your reference and convenience only.

To add an entry:

- Click the ADD COURSE TO JOURNAL button.

You may modify or delete any entry by clicking the *modify* link immediately to the right of the title.

Launching Courses

From the *My Courses* page, click on the course title for the course you wish to launch under the *Courses In Progress* tab.

COURSES IN PROGRESS		COMPLETED COURSES	COURSE HISTORY	EXTERNAL COURSE JOURNAL	
Formats	Catalog Number	Course Title (Subs. Brand)		Expiration Date	Credits
<input type="checkbox"/>	<input type="checkbox"/>	991004	Travel, Entertainment, Gift, and Car Expenses (SPA) <input type="checkbox"/>	Jul 15, 2005	6.00
<input type="checkbox"/>	<input type="checkbox"/>	998646	CPAR GOV/NFP - Vol. 2003 - No. 4 - A - Improving Audit Quality - The First Steps (CPAR) <input type="checkbox"/>	Jul 15, 2005	2.00

(Click to view detail)

Logging Out

To Log Out:

Click the LOG OUT button located beneath your name at the top of the screen.



Purchasing and Enrolling

You can purchase courses either individually or through a subscription. Individual courses cost a single fee for a single course. A Subscription allows you to take a group of courses over a period of one year.

Note: You cannot purchase a renewal for a subscription until your existing subscription expires.

Buying a Subscription

Update Courses For Accountants:



FMN Online Subscription

Annual Subscription: \$319 (Our Price | \$329.00 Regular Price)

- FMN Online is the leading financial "update" subscription program in the industry. Used by more than half of the Fortune 500 companies, FMN produces 48 new courses, 4 every month (and has more than 72 archived courses). An annual subscription includes "fast track" outlines, transcripts, quizzes, and the ability to track credits and print completion certificates. All courses qualify for CPE credit under NASBA QAS certification. FMN features top industry experts discussing topics and issues at the forefront of today's finance and accounting profession.

[View Catalog](#) | [Back to Top](#)



To purchase a subscription:

- Select the tab for your discipline of interest
- Click the *Subscription Courses* tab. This tab will not appear if there are no subscriptions available.
- Read through the available Subscriptions (see picture above for example).
- Click the BUY SUBSCRIPTION button.
- Read through the Subscription and License agreement and click the I AGREE button located at the bottom of the page.
- Check your billing information, enter your credit card number and expiration date and click BUY NOW to purchase your subscription.

Buying an Individual Course

To purchase an individual course:

- Access the course catalog by clicking on the *ACCOUNTING & FINANCE* tab.
- Select a course subject area from the list. This will bring you to the catalog for that subject area within your discipline.

Please begin by selecting a course subject area from a subscription catalog below.

Accounting:

(total active courses in parenthesis)

SPAdvantage SmartPros Advantage Courses

- SPA Accounting/Auditing (96)
- SPA Ethics (7)
- SPA Financial Planning (17)
- SPA Information Systems and Computer Applications (3)
- SPA Management (24)
- SPA Taxation (37)

SPA+ SPA+ Plus

- SPA+ Auditing (3)
- SPA+ E-commerce (1)
- SPA+ Financial Reporting (1)
- SPA+ Management (4)
- SPA+ Security & Control (0)

- Click the ENROLL button for the course you wish to purchase. The title and price will be listed individually for confirmation.

SPA Management				Price/
Formats	Catalog Number	Course Title (Subs. Brand)	Credits	Status Action
	991016	Preventive Stress Management (SPA)	5.00	\$79.96 ENROLL
	991017	Managing Change (SPA)	4.00	\$39.98 ENROLL

- To continue with your purchase click PROCEED. This will bring you to your Shopping cart. From here you can either purchase your course or continue shopping.

Promotional Codes

Promotional codes may allow you to "purchase" courses for free. If you have a promotional code, enter it into the promotional code field on the *My Courses* page and click the SUBMIT button. Doing so will provide you with free credits.

Shopping Cart


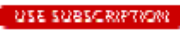

Any items you've added to your purchase cart are listed here. This may include individual courses or subscriptions. This tab will not appear if your cart is empty.

Custom Billing Code

If you have a Custom Billing Code, enter it in the box to the left of the PURCHASE button. If you do not have a billing code, you may ignore this field.

Pay by Subscription or Credits

If you have courses in your shopping cart that are a part of a valid subscription, click the USE SUBSCRIPTION button to "purchase" them. Similarly, if you have available credits, you may apply your credits to the courses purchased here. These options will only be visible if available.

...you can apply these actions to the checked courses above:   

Completing Your Order

To complete your order, click the PURCHASE NOW button.



Courses & Catalogs

Enrolling in and Browsing Courses

You can view available courses by selecting a course library tab located near the top of the page.



By clicking the **Accounting & Finance** tab, you will see the following page:

Please begin by selecting a course subject area from a subscription catalog below.

Accounting:

(total active courses in parenthesis)

SPAdvantage SmartPros Advantage Courses

- SPA Accounting/Auditing (96)
- SPA Ethics (7)
- SPA Financial Planning (17)
- SPA Information Systems and Computer Applications (3)
- SPA Management (24)
- SPA Taxation (37)

SPA+ SPA+ Plus

- SPA+ Auditing (3)
- SPA+ E-commerce (1)
- SPA+ Financial Reporting (1)
- SPA+ Management (4)
- SPA+ Security & Control (0)







Selecting a subject area from this catalog page will bring you to the *view catalog* page for that subject area. (example below)

SPA SmartPros Advantage Courses					
Catalog	Course Title (Subs. Brand)	Credits	Price/	Status	Action
Formats	Number				
	000000 Transactional Efficiency Meets Financial Policy (SPA)	1.00	\$0.00	LAUNCH	
	8004 How to Prevent Sexual Harassment and Hostile Work Environments--Manager Version (SPA)	4.00	\$79.96	ENROLL	
	8005 How to Prevent Sexual Harassment and Hostile Work Environments--Employee Version (SPA)	4.00	\$79.96	ENROLL	

Clicking the ENROLL button will add the course to your Shopping Cart and allow you to enroll in the course.

Catalog View Page






SPA SmartPros Advantage Courses


Formats	Catalog Number	Course Title (Subs. Brand)	Credits	Price/Status	Action
	000000	Transactional Efficiency Meets Financial Policy (SPA)  (7)	1.00	\$0.00	LAUNCH
	8004	How to Prevent Sexual Harassment and Hostile Work Environments--Manager Version (SPA) 	4.00	\$79.96	ENROLL
	8005	How to Prevent Sexual Harassment and Hostile Work Environments--Employee Version (SPA) 	4.00	\$79.96	ENROLL
(1)	(2)	(3)	(4)	(5)	(6)

When you arrive at the *catalog view* page, you'll be presented with a screen similar to the one above.

The columns in the catalog view are :


1. Formats: Indicates the type of goods and media included in the course. Refer to the Format Key below for more information.


Format Key:  Video  Flash  Text  CD  Book


2. Catalog Number: The Catalog number of the course.
3. Course Title: Indicates the title of the course.
4. Credits: Credits that can be earned from this course.
5. Price: The price to enroll in the course.
6. Action: For courses you have not enrolled in, this will be ENROLL. For courses you have already enrolled in or are part of your subscription, it will be a LAUNCH button.
7. Course Detail Icon (): Information and course details. Clicking this icon will provide you with a summary of the course, its cost, author, expiration date and more.


Product Lines and Catalogs

SmartPros Accounting & Finance courses are separated into the following libraries :

 Smart Pros Advantage (SPA and SPA Plus) – Skills-based Text and Multimedia courses designed for all types of managers, accountants and other business people.

 Financial Management Network – "Update" courses released monthly in multimedia format, designed for Finance & Accounting professionals in industry.

 CPA Report – "Update" courses released monthly in Multimedia format designed for Finance & Accounting professionals practicing in public accounting firms.

 CPA Report Government & Not-For-Profit Edition – "Update" courses released quarterly in Multimedia format, designed for Finance and Accounting professionals practicing in the Government and Not -For-Profit arenas.

Additional Features

NOTE: These features are not available for all SmartPros Customers.

Pretest Courses

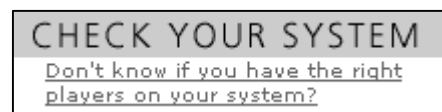
Pretest Courses can be found at the right of the *Home* page.

Before courses have been rated for credit, they exist as "Pretest Courses." Users may enroll in a Pretest course for free in order to evaluate the course and to provide feedback on it. The feedback collected and time taken to complete the course for these pretest users determines the course's credit amount.



Check Your System

Located below the *Course Pretest* box on the home page, *Check Your System* allows you to check your computer to see if you have the necessary media players.



Clicking the **Don't know if you have the right players on your system?** link will bring you to the *System Requirements* section of the *Help* page.

Help

The *Help* section is intended to answer questions you might have while using the SmartPros system.

To access Help:

- Click the HELP button located on the top right of any page.

Navigate *Help* by clicking the help topic categories at the left of the screen.