

# IMPORT SMART PRACTICE AIDS<sup>®</sup> ENGAGEMENT

## Checkpoint Engage<sup>™</sup> with AdvanceFlow<sup>®</sup>

SMART Practice Aids<sup>®</sup> engagement to be imported should be same edition year and industry title as Checkpoint Engage<sup>™</sup> engagement (ie 2016 Nonpublic).

SMART engagement should not be in Finalized status. If so, it will be necessary to reset to in progress, or perform a rollforward in SMART prior to import.

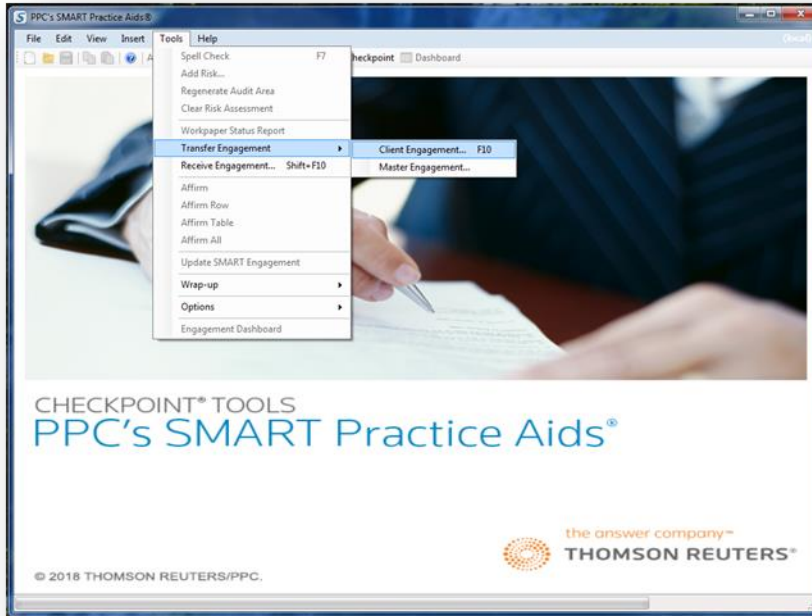
Watch this brief video  of these instructions.

### For Further Information...

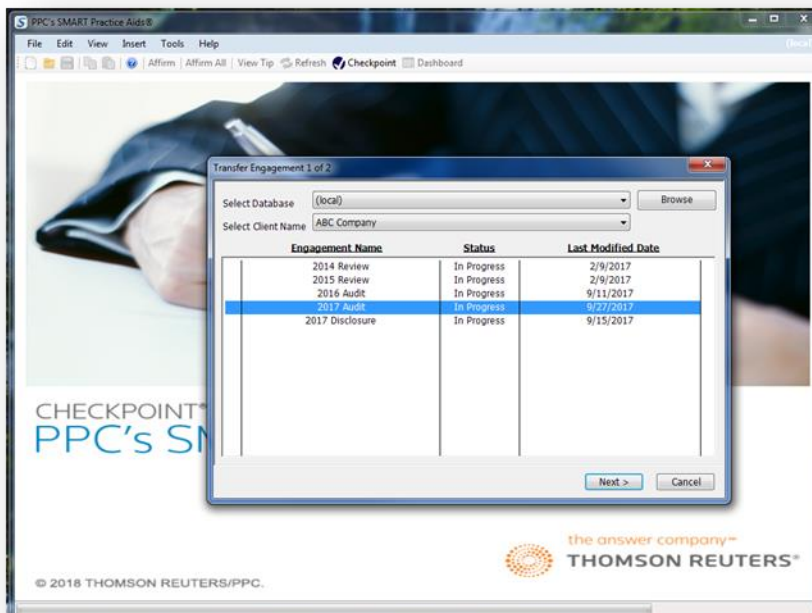
- Checkpoint Engage<sup>™</sup> product support email: [checkpointengage.support@thomsonreuters.com](mailto:checkpointengage.support@thomsonreuters.com)
- Documentation available on our Checkpoint Engage<sup>™</sup> Customer Help Center:  
<http://support.checkpoint.thomsonreuters.com>
- AdvanceFlow<sup>™</sup> product support email: [afsupport@tr.com](mailto:afsupport@tr.com)
- GoFileRoom product support email: [gfrsupport@tr.com](mailto:gfrsupport@tr.com)

# In SMART Practice Aids®

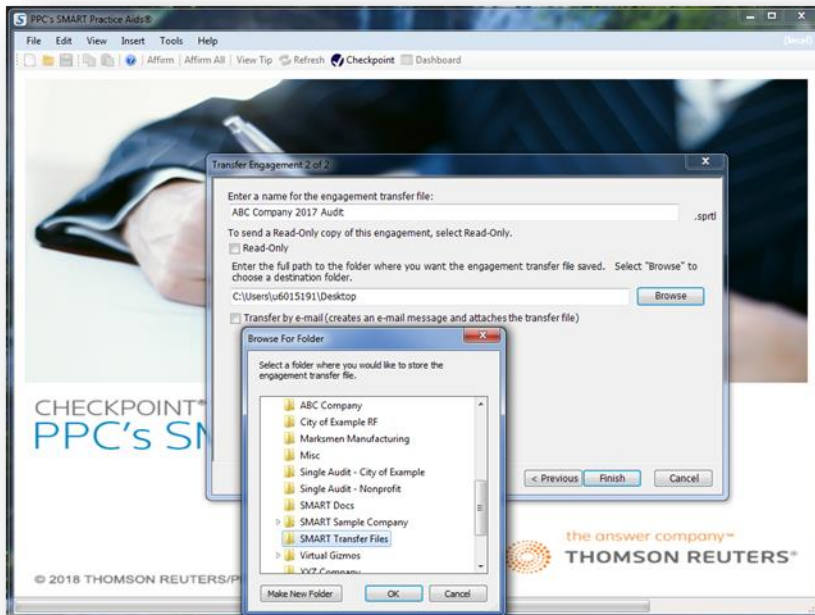
Create a transfer file of the SMART engagement.



Select Tools ⇒ Transfer Engagement



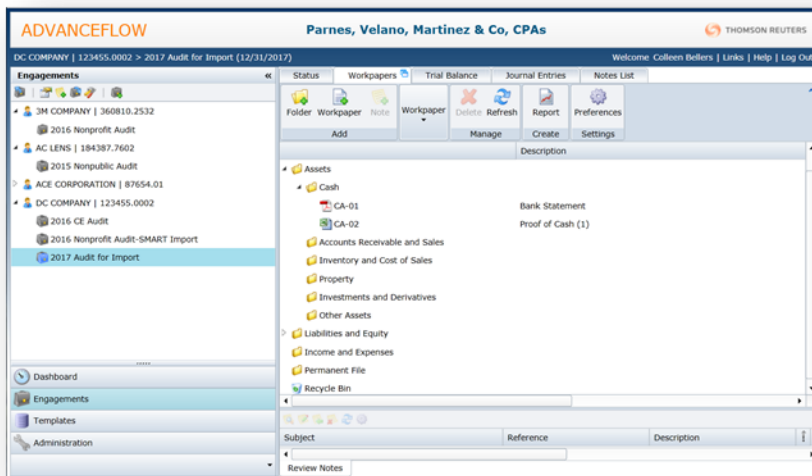
Select engagement to be transferred. It will create a .sprtl file and transfer a live copy and make yours read only. You can transfer to a location, for example a network server, using the Browse button, or check the box to Transfer by email. Click Browse to choose a different folder location if needed or if the path is blank.



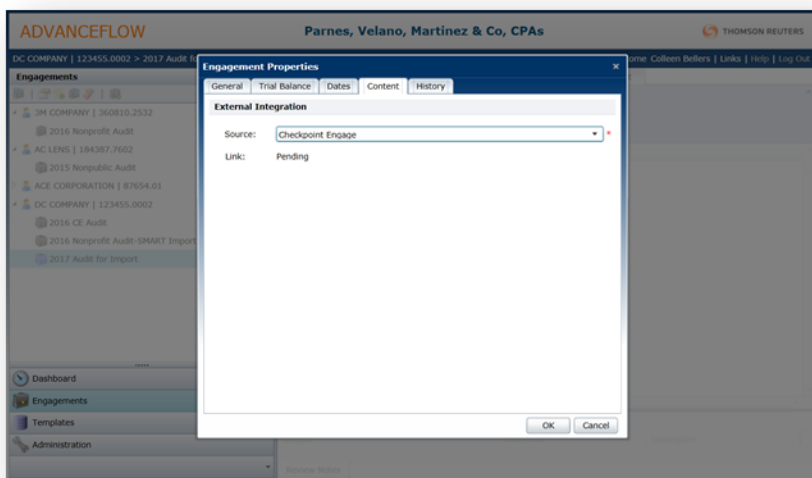
Click Finish

# In AdvanceFlow™

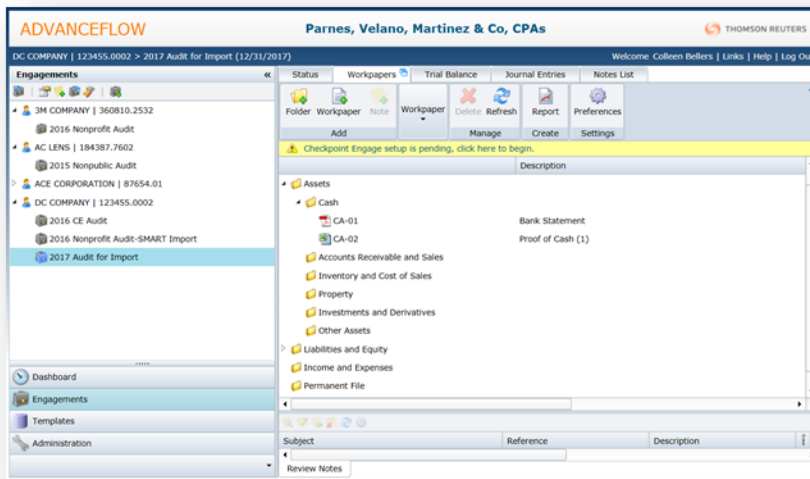
Create a new engagement or Select an existing engagement



To enable Checkpoint Engage™ on the engagement, use AdvanceFlow™ Engagement Properties ⇒ select Content Tab ⇒ select Checkpoint Engage as external integration source.



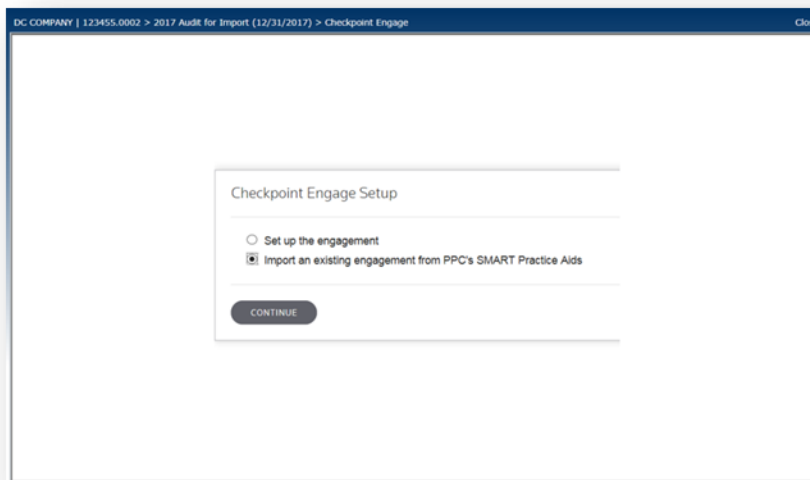
Click yellow banner to create Checkpoint Engage™ engagement.



Checkpoint Engage Setup window appears.

- Set up the engagement – use to create a new engagement and proceed thru the options to select audit areas and answer setup questions for the engagement.
- Import an existing engagement from PPC's SMART Practice Aids – begins the import process.

To import, select import an existing engagement, then continue. You do not need to select the first option to set up the engagement first.



Browse and select transfer file. Note engagement information of source transfer file on left of screen, this should be the same as the Checkpoint Engage engagement.

Click upload. (If you don't see upload button on bottom, window is not large enough, use scroll bar on right to scroll down, or drag corner of window and make larger.)

DC COMPANY | 123455.0002 > 2017 Audit for Import (12/31/2017) > Checkpoint Engage Close

**1** Upload File **2** Import Engagement

Source  
Imported from SMART Practice

Engagement Name  
2017 Audit

Industry  
Audits of Nonpublic Companies (2/17)

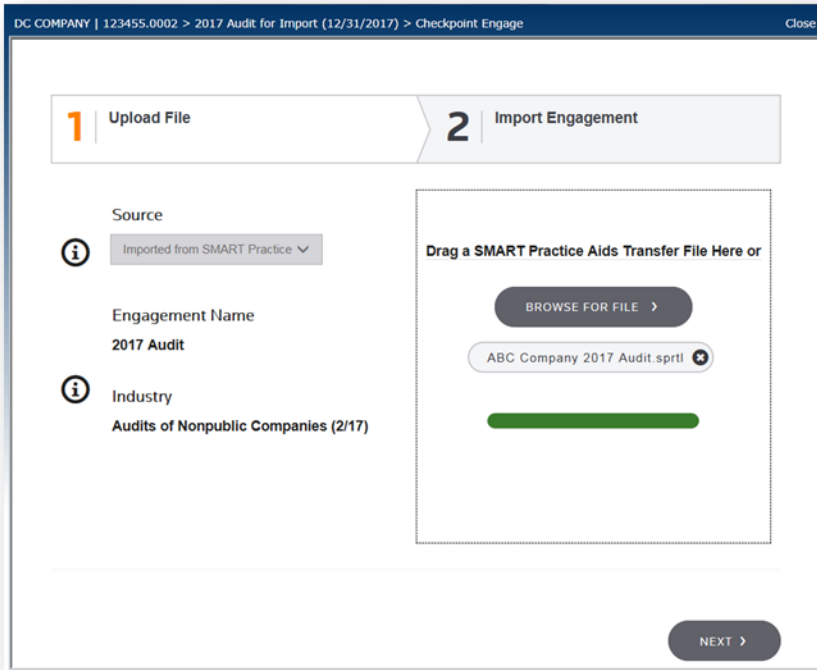
Drag a SMART Practice Aids Transfer File Here or

BROWSE FOR FILE

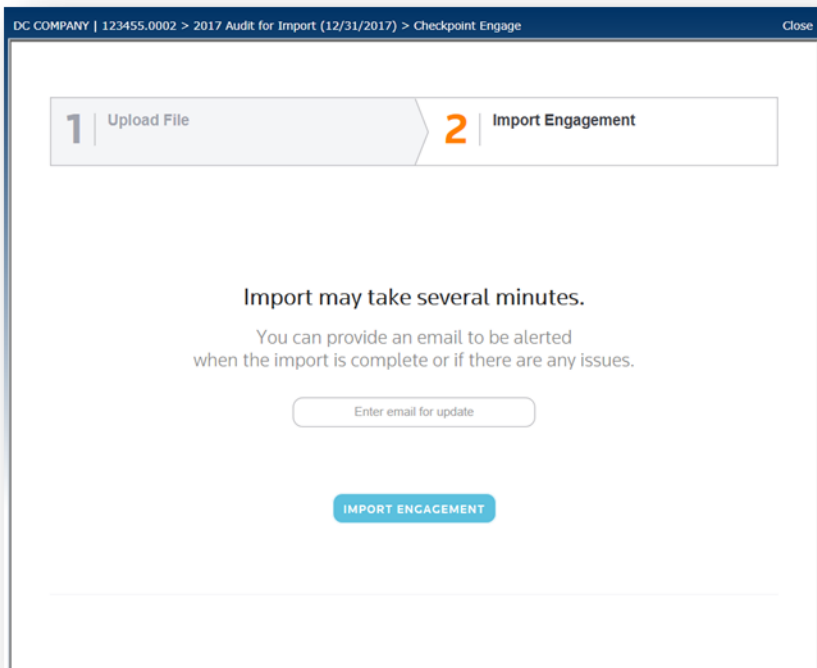
ABC Company 2017 Audit.sprtl

UPLOAD NEXT

When the green progress bar shows complete, click next.

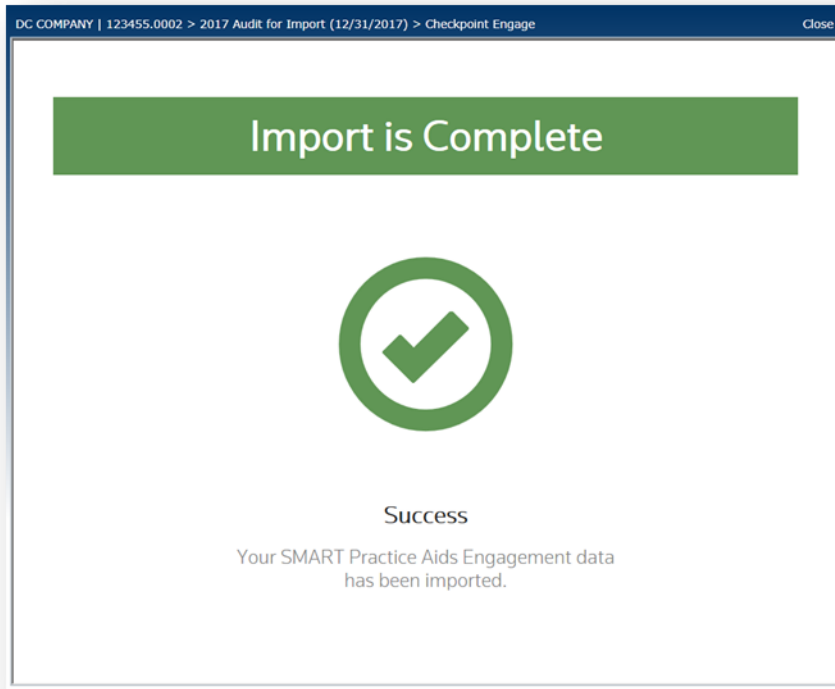


Click import engagement. You can work on other functions during the import process. You can provide an email to be alerted when import is complete. (If you don't see blue button to import engagement, window may not be large enough, scroll down or make the window larger.)



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The message 'import is complete' will appear after a successful import. Close the window.



If the import is not successful, the message 'import did not complete' will appear. The SMART engagement will need to be reviewed by Technical Support to determine the issue.

**Select AdvanceFlow refresh before opening any imported Checkpoint Engage documents.**



After a successful import, Checkpoint Engage folders and documents are available in a new Imported Document folder. Any existing folders and other documents have been retained. New folders can now be created, folders renamed, and documents organized as needed. Delete any unused folders. This organization is for the first year set up only.

