

IMPORT SMART PRACTICE AIDS[®] ENGAGEMENT

Checkpoint Engage[™] (Onvio)

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

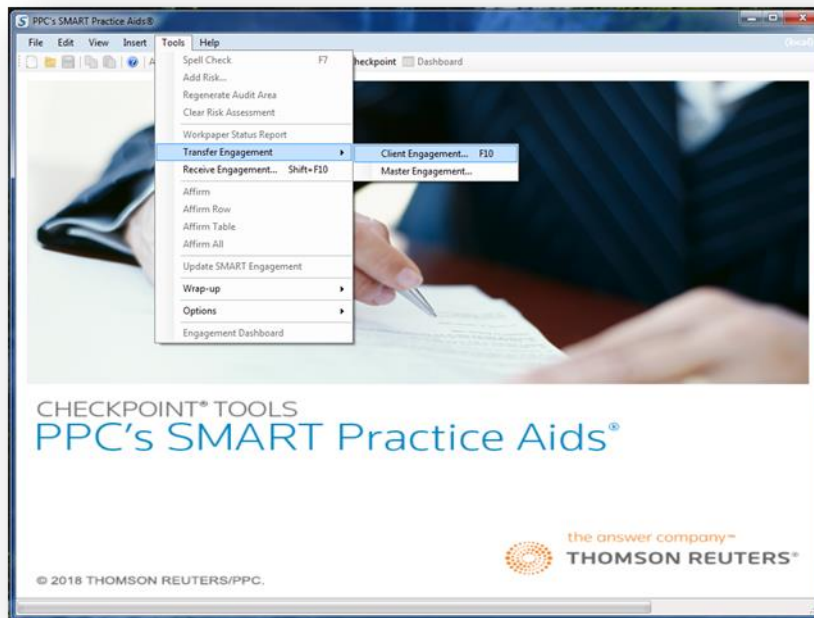
SMART engagement should not be in Finalized status. If so, it will be necessary to reset to in progress, or perform a rollforward in SMART prior to import.

For Further Information...

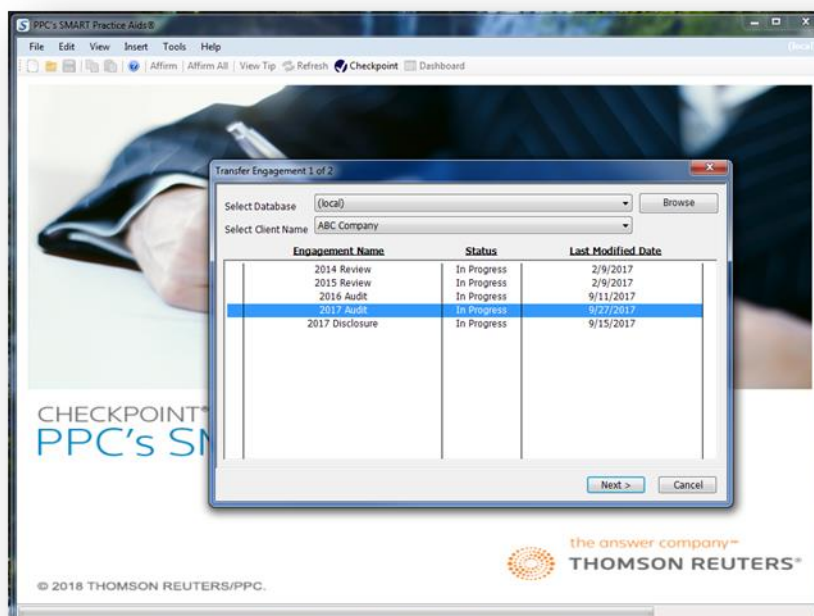
- Checkpoint Engage[™] product support email: checkpointengage.support@thomsonreuters.com
- Documentation available on our Checkpoint Engage[™] Customer Help Center:
<http://support.checkpoint.thomsonreuters.com>

In SMART Practice Aids®

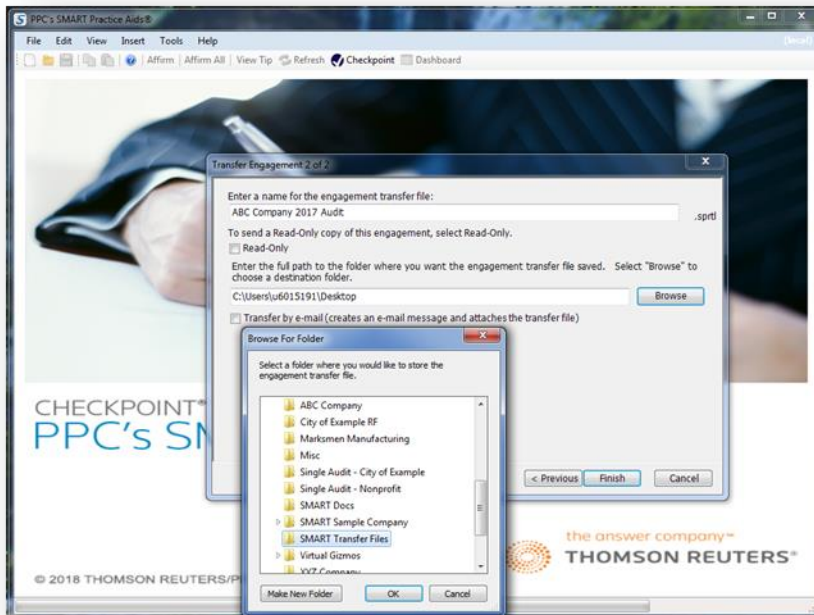
Create a transfer file of the SMART engagement.



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.

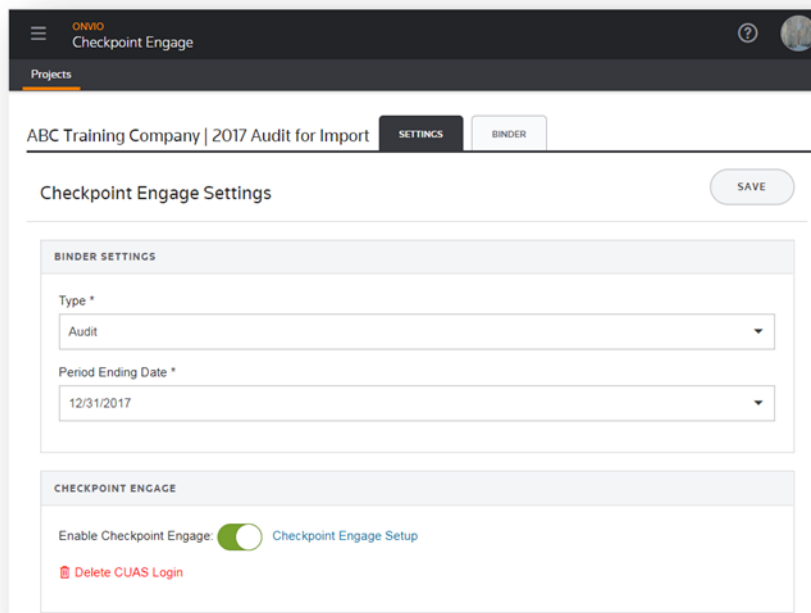


Click Finish

In Checkpoint Engage™

Create a new Project or Select an existing Project.

To enable Checkpoint Engage™ on the engagement, click on Checkpoint Engage Setup from the SETTINGS tab of the Project.



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.

Checkpoint Engage Setup

Set up the engagement

Import an existing engagement from PPC's SMART Practice Aids

CONTINUE

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.)

1 Upload File

2 Import Engagement

Source
Imported from SMART Practice Aids

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.

1 Upload File

2 Import Engagement

Source
Imported from SMART Practice Aids

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.spptl

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.)

1 Upload File

2 Import Engagement

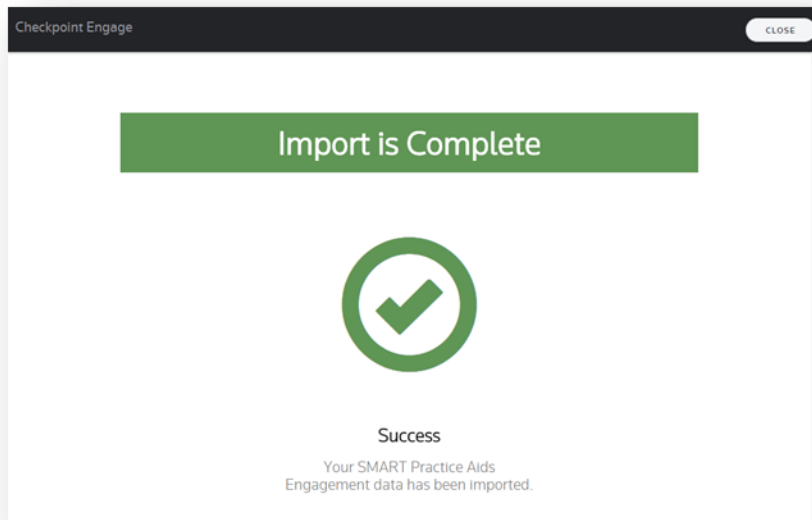
Import may take several minutes.

You can provide an email to be alerted when the import is complete or if there are any issues.

Enter email for update

IMPORT ENGAGEMENT

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.

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.

