

Procedure of Copy Components from financial statements template to a new audit international engagement



VERSION 2.00

PROCEDURE SUMMARY

1.	Create the new Audit engagement	3
2.	Create file and copy documents from another template	3

1. Create the new Audit engagement

a. Enter CaseWare Working Papers. From File select New.



2. Create file and copy documents from another template

a. In Create a New File window, put the new file name for the audit international file. Browse in folder to specify the location you will create the new file. Select to create file and copy documents from another template based on Audit International.



Note: Both Audit International Template and Financial statements Template must be installed

b. On creation of the file appears the Engagement Profile Selector. Select the profile to start your Engagement. Click OK.

Engagement Profile	×
Engagement Profile Selector	\checkmark
This wizard assists you in selecting the preliminary engagement profile required to start your engagement:	
✓ OneForm +	
"OneForm+" uses the "OneForm" profile and adds CaseWare's automated risk tracking and report more details	Select Profile
Core	
"Core" profile includes all available features and the Core documents included in the International SME guide.	Click OK.
more details	
Tailor per engagement	
"Tailor per engagement" profile includes all available audit features and all documents included in based on the IFAC SME guide.	the International toolkit
more details	
ок	No Profile Help

c. When the file is created, a window will appear to select a source template from which to copy documents. Select Financial Statements Template. Click Next.

New File with Documents from Another Template	×
Select a template Select a source template from which to copy documents.	
Financial Statements Template	
< Back Next > Cancel	Help

d. Tick the "Documents" box. Click "Deselect All" and then select document 01.10 Financial statements, 01.14 Information store and any other document you wish to include in your file. Make sure the box "Copy documents only (no folders)" is unticked.



e. Click Finish to copy documents.

New File with Documents from A	Another Template	×
	Ready to copy documents	
	From: C:\Program Files (x86)\CaseWare\Template\Financial Statements Template\Format.ac	
	To: C:\Program Files (x86)\CaseWare\Data\Audit Ltd 2020\Audit Ltd 2020.ac	
	To proceed, click Finish.	
	c Pask Finish Cancel Ha	
	< back Finish Cancel He	p

f. On completion a message appears "Documents have been added to top of the Document Manager". Click OK.



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8 Name					
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