



CMS SYSTEMS SOLUTIONS
CASEWARE AUTHORISED DISTRIBUTOR

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



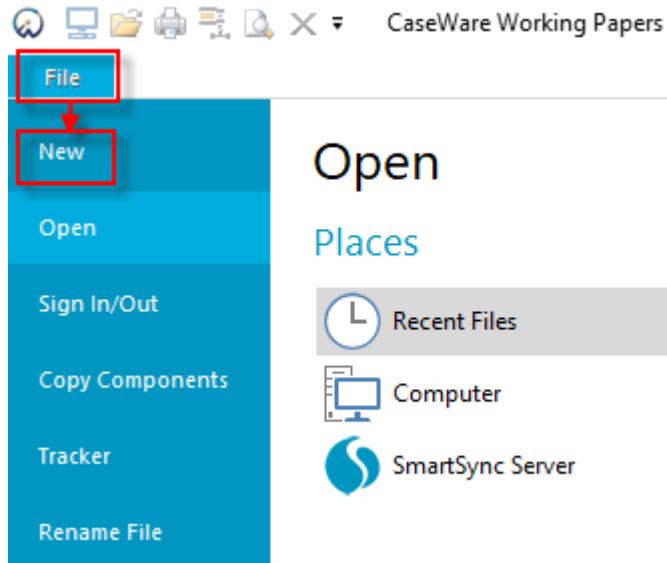
VERSION 1.00

PROCEDURE SUMMARY

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

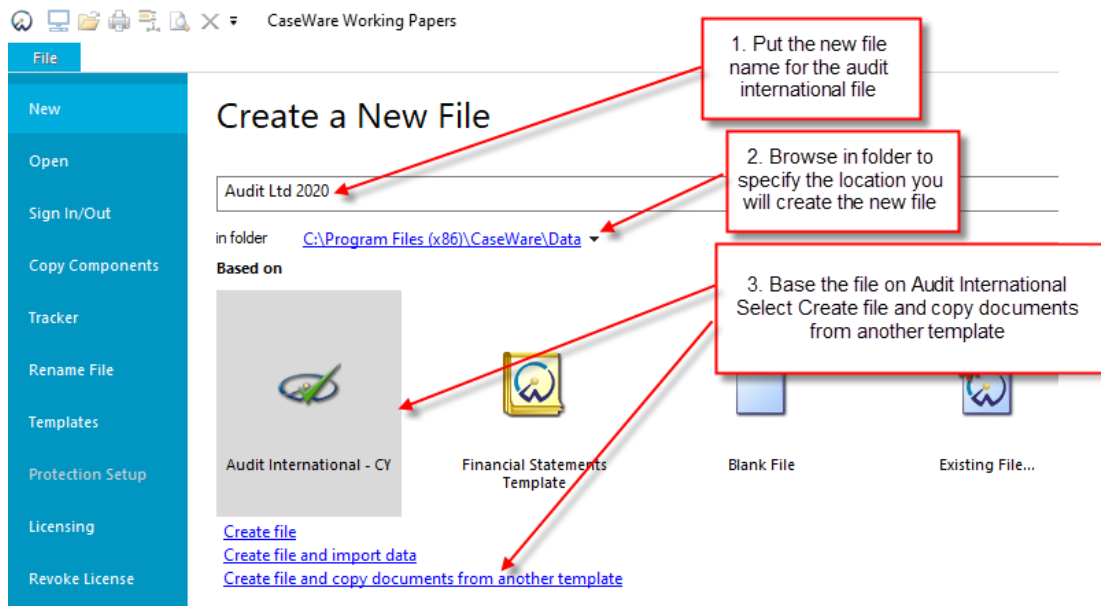
1. Create the new Audit engagement

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



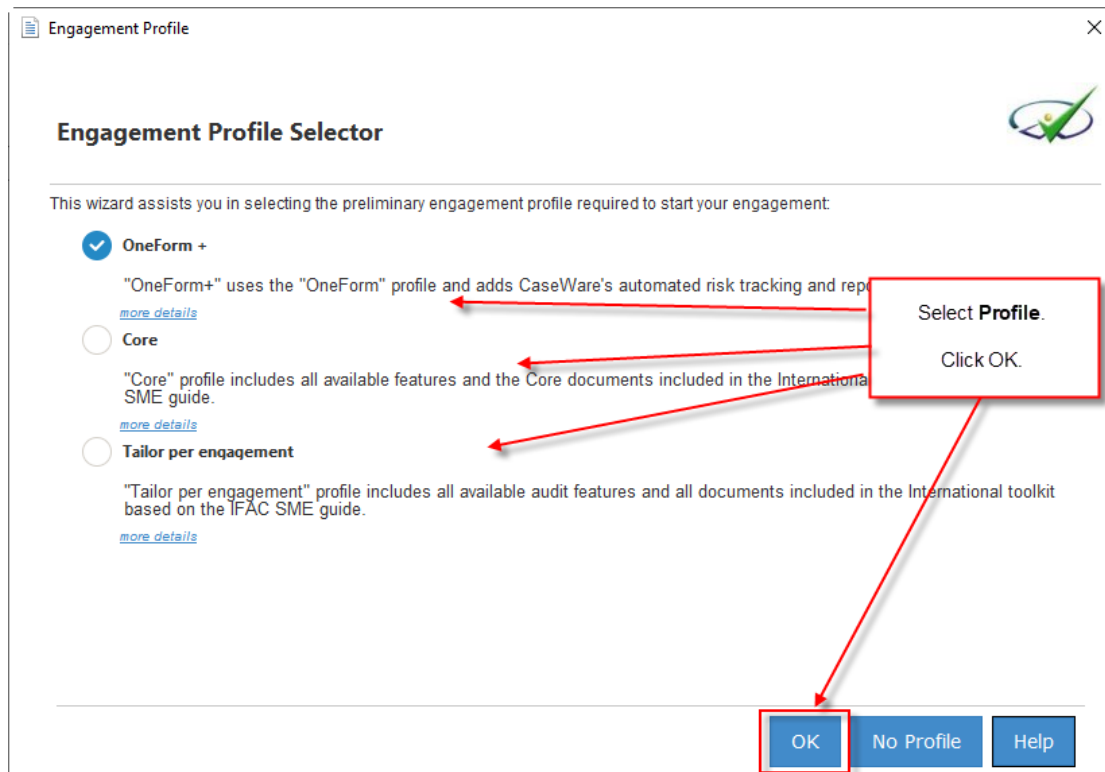
2. Create file and copy documents from another template

- 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.

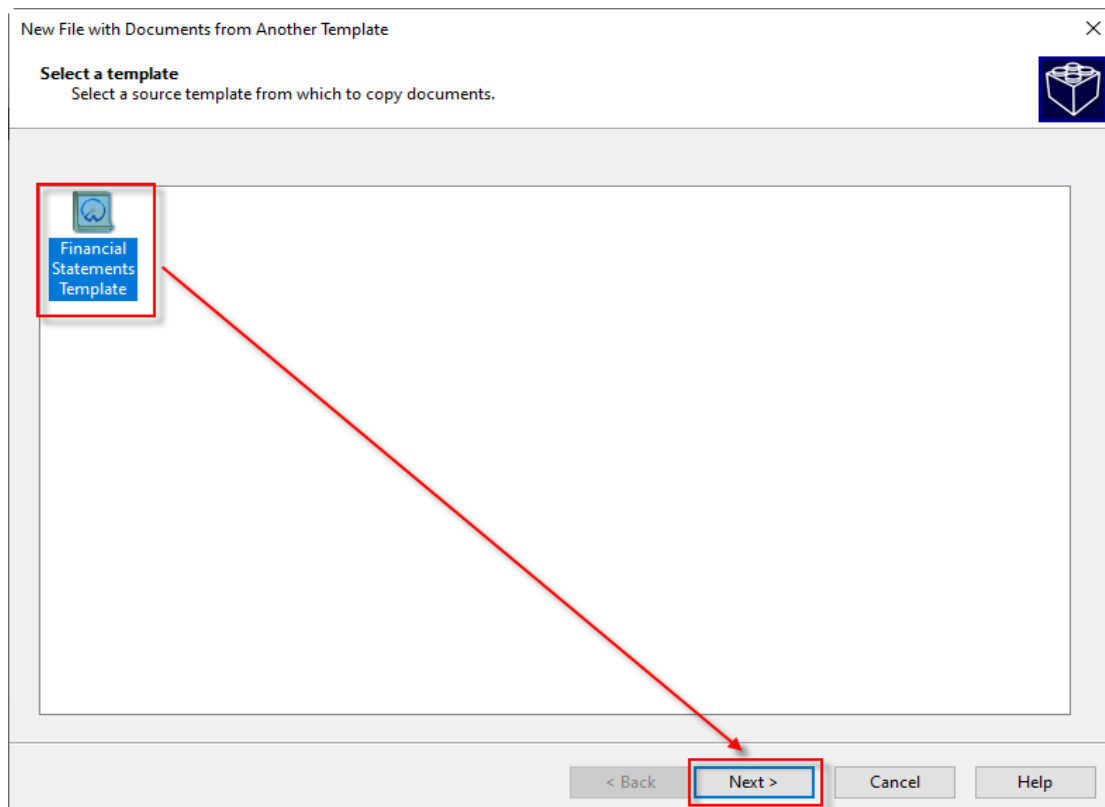


Note: Both Audit International Template and Financial statements Template must be installed

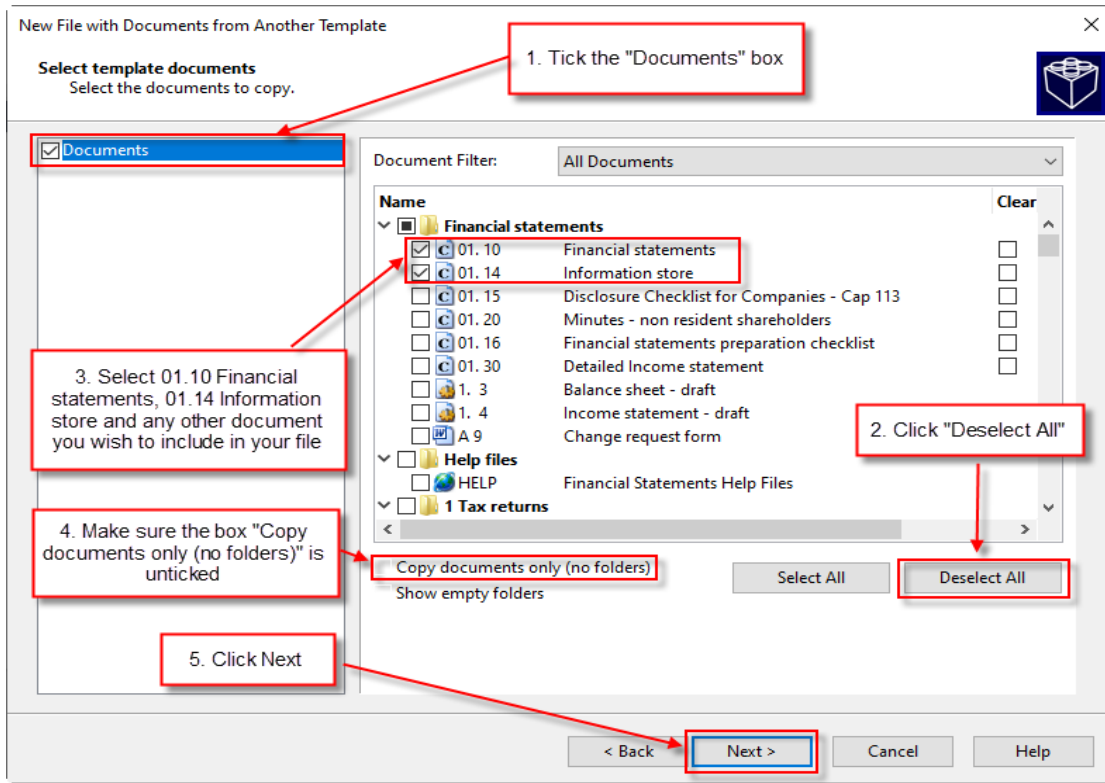
- b. On creation of the file appears the Engagement Profile Selector. Select the profile to start your Engagement. Click OK.



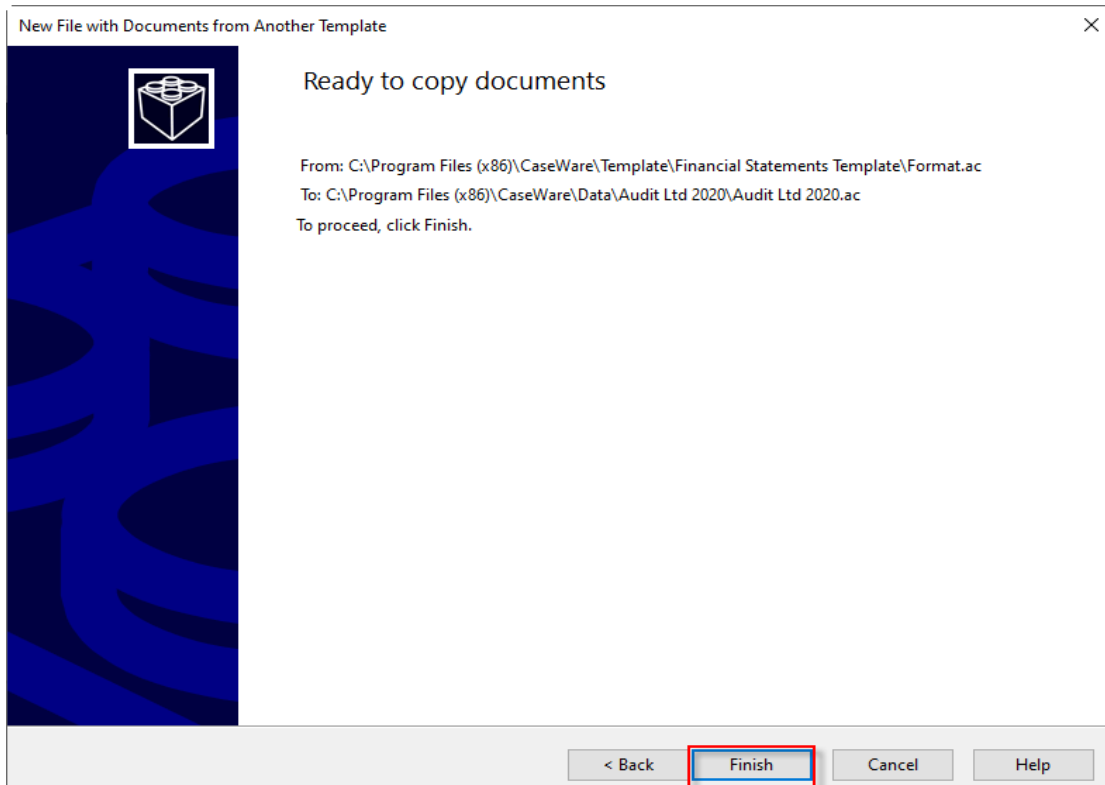
- c. When the file is created a window to select a source template from which to copy documents will appear. Select Financial Statements Template. Click Next.



- 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. Click Next.



- e. Click Finish to copy documents.



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

