

# GETTING STARTED

## with Checkpoint Engage™

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## Using Checkpoint Engage

Thank you for using Thomson Reuters® Checkpoint Engage.

You can rely on our trusted engagement process and risk-based audit program design, using the power and convenience of the cloud. The following information will help you get started. Please read this entire document before proceeding with implementation and product use. Underlined links will direct you to more detailed information. All documentation and up-to-date product support information is available from our Customer Help Center at [support.checkpoint.thomsonreuters.com](http://support.checkpoint.thomsonreuters.com).

### Checkpoint User Administration System

Checkpoint Engage requires the use of Thomson Reuters industry audit content (nonpublic, nonprofit, local government, etc.). Checkpoint Engage users must have the product codes assigned to their Checkpoint® user ID in the Checkpoint User Administration System. For information on assigning users, check with the Site Administrator for your firm, or refer to [CUAS Quick Reference Card](#) for instructions.

If you did not receive an email with your Checkpoint user IDs and instructions on how to access Checkpoint, you can submit an online request at [support.checkpoint.thomsonreuters.com](http://support.checkpoint.thomsonreuters.com).

### Internet Explorer Trusted Site Setting

A trusted site setting for Checkpoint Engage must be added to each workstation. In Internet Explorer, select Tools/Internet Options, click on the Security tab, click Trusted sites, then click the Site button. In the new window, add the following site: [https://\\*.onvio.us](https://*.onvio.us), click the Add button, then close both windows.

### Installing Checkpoint Tools Framework

While Checkpoint Engage is an online audit solution, certain documents such as letters and a few of the practice aids will open in MS Word or Excel with the option to use functionality on the PPC menu in Word and Excel. Use of the PPC menu functionality is optional - each workstation must have the Checkpoint Tools framework installed in order to use it. Users of Checkpoint Tools will already have the framework installed. To install if needed, log in to Checkpoint and then from the Tools area, select the PPC Install/Update link. Then click the Install/Update button.

### Technical Support

For technical assistance with Checkpoint Engage, please email [checkpointengage.support@thomsonreuters.com](mailto:checkpointengage.support@thomsonreuters.com).

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## For AdvanceFlow Users

Thomson Reuters Checkpoint Engage and AdvanceFlow provide a completely integrated cloud-based solution for enterprise audit firms. Checkpoint Engage and AdvanceFlow require separate product license. Please allow several days for processing of a new order to enable Checkpoint Engage on your firm's AdvanceFlow database.

For functionality instructions using Checkpoint Engage™ with AdvanceFlow®, refer to separate documents on our Customer Help Center:

- [Using Checkpoint Engage – Integrated with AdvanceFlow](#)
- [Checkpoint Engage User Guide](#)
- [Checkpoint Engage – SMART Practice Aids Import](#)

### Technical Support

For technical assistance with AdvanceFlow, please email [afsupport@thomsonreuters.com](mailto:afsupport@thomsonreuters.com).

## For Onvio Users

Please allow several days for processing of a new order to enable Checkpoint Engage on your firm's Onvio database. If the order is for a new account setup of Onvio, your Firm Administrator will receive a Welcome email to proceed with the initial registration process.



The Onvio Center setup must be completed in its entirety in order to access Checkpoint Engage. Refer to the below links for Onvio Center setup instructions.

- [Getting Started with Onvio Documentation](#)
- [Checkpoint Engage Functionality: Onvio Center Set-Up Video](#)

For functionality instructions using Checkpoint Engage with Onvio, refer to separate documents on our [Customer Help Center](#).


- [System Requirements for Onvio](#)
- Download the [Onvio Link](#) to edit files locally and synch, and print from local applications


### Technical Support

For technical assistance with Onvio, please email [Onvio.SupportUS@ThomsonReuters.com](mailto:Onvio.SupportUS@ThomsonReuters.com).


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## Frequently Asked Questions

 What happens if we don't have an Internet connection?

 In those situations where you don't have reliable internet access for all clients, we encourage you to keep your SMART Practice Aids desktop version in addition to Checkpoint Engage. This gives you flexibility and allows you to adopt the web-native application without being held back by a few clients that do not provide reliable internet access. Over time, as you gain reliable internet access for these engagements, you can easily convert them to Checkpoint Engage. We will offer a combo discount to license both the current desktop products and the new online products.

 Will all the Checkpoint® Tools products be available online?

 No, existing Checkpoint Tools products are still installed and used locally like today. If you will be completely on the web with Checkpoint Engage, and use all the documents provided in the audit industry engagement titles online in Checkpoint Engage and AdvanceFlow, then you won't need to continue to license the same products on desktop.

If you still need to have desktop access for SMART and Checkpoint® Tools for some engagements, we will offer a combo discount to license both the current desktop products, and the new online products.

Not all of the Checkpoint Tools are used in SMART, so those will continue to be installed and used locally for the foreseeable future. For ex, Practice Aids for Quality Control, Nontraditional Engagements, Reporting on Controls for SOC 1 and SOC 2, etc.