


Adding Viewer Only Contacts

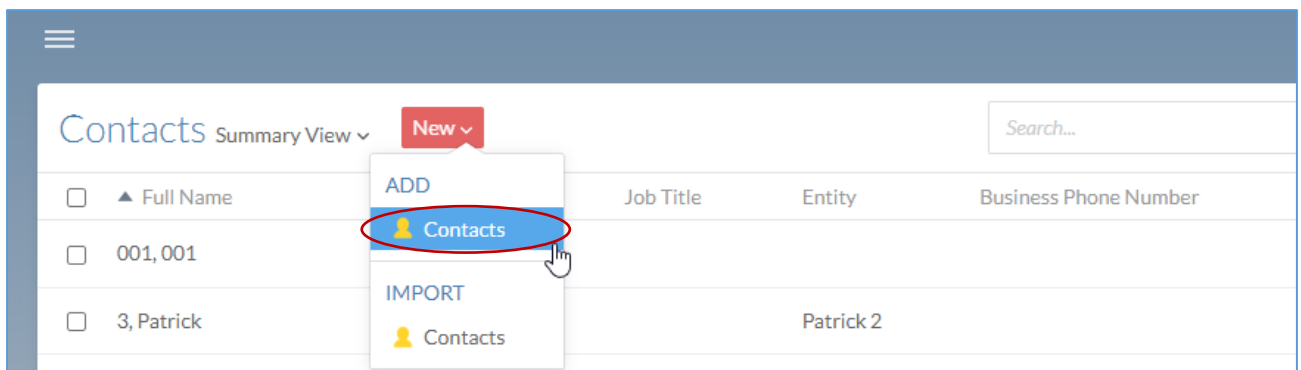
Adding Viewer Only Contacts

The ability to add Viewer only contacts has been enabled across the audit template suite on Caseware Cloud. This is particularly useful when a third party needs to carry out a cold-file review an audit engagement.

Creating a Contact

To create a contact:

1. Ensure that you have the *Staff Admin* role or equivalent rights.
2. From the **Cloud** menu () , select **Contacts**.
3. Select **New** and, under **ADD**, select **Contacts**.





4. Enter the appropriate name and contact information.
5. If you want to set the user's password, select the **Password** pane, select **Set**, and enter the new password. Otherwise, the user will set their password.
6. Select **Save**.

The user is added to your Cloud organization and can be seen in **Contacts**.

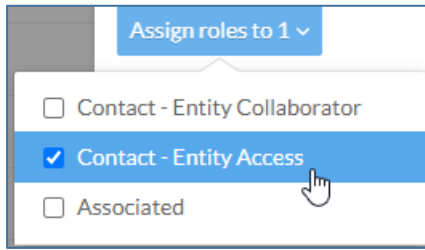
Granting a Contact access to an Entity

To grant a contact access to an entity:

1. Ensure that you have the *Owner* role or the equivalent privileges for the entity.
2. From the **Cloud** menu () , select **Entities**.
3. Select the entity you want to grant access to, then select **Share** () .



4. Search for the contact you want to grant access to, then select **Assign Roles to (#)** and select the check box next to the **Contact - Entity Access** option.



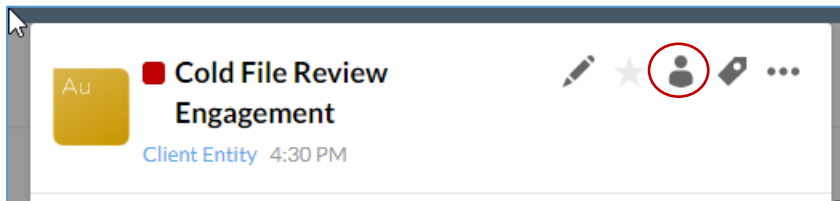
Can access existing content only. When assigned this role, contacts cannot receive file requests or initiate any discussions or communication within the organization.

5. Select **Share**.

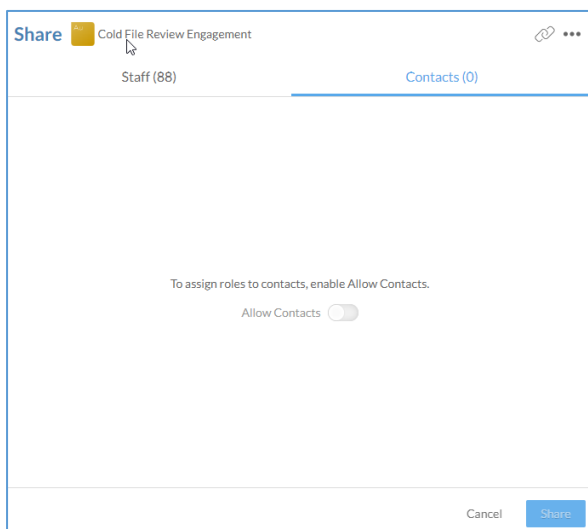
Granting a Contact access to an Engagement in an Entity

To grant access to a specific engagement in an entity:

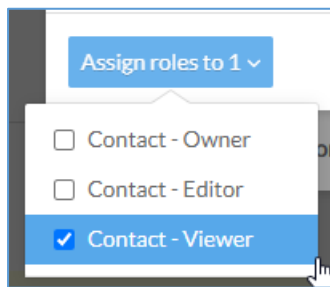
1. Ensure that you have the *Owner* role or equivalent rights to the files.
2. Select the entity that you have added the contact to.
3. Select the engagement that you want to grant access to.



4. Select **Share** (👤).
5. Under the **Contacts** tab, enable **Allow Contacts**.



Select the contact you want to have access to the engagement, then select **Assign Roles to (#)** and select the check box next to the **Contact-Viewer** role.

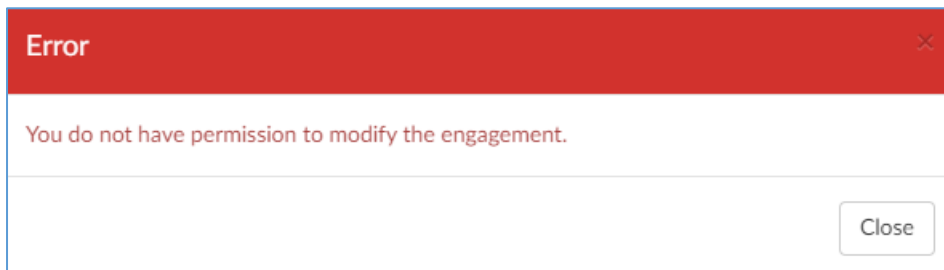


Contacts with this role may view and download content where they have this role.

6. Select **Share**.

The contact will now see the engagement in the list of engagements under the entity they have been assigned to and will now be able to access the file.

Whilst they are in the file they will be able to move around with read-only access. If they accidentally make a change a warning will appear to indicate that they do not have permission to modify the engagement.



Any changes they make will be reverted on refreshing the screen.