caseware.

Caseware Working Papers 2023

Application Installation Notes

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Installing the Caseware application

If Caseware data is stored on the local C:\ drive, ensure that you have a current backup of your Data directory and that you have read any relevant documentation in the Readme files section of the installation package.

Please note: The following installation instructions relate to stand-alone environments. For information concerning network installations please refer to our Help site – https://help.caseware.co.uk.

If Caseware Working Papers has already been installed, ensure that you install to the same location. The default location is C:\Program Files (x86)\CaseWare\. There is no need to uninstall any previous versions of Caseware Working Papers or templates.

- You MUST be logged onto the computer as an administrator in order to install the application and/or templates.

- The first option is to install the Caseware Application (provided as a separate download).

- After installing the application;

    For new installations, install the template(s) following the instructions below.
    Please note that you will require a password or serial number which will be included in your covering letter.

- Finally, open Caseware Working Papers and enter your user details when requested. This information is required for using the Sign Out function.

Full installation instructions are detailed below. We recommend the following standard approach:

- Caseware Working Papers application must be installed before the templates.

- The default installation locations are followed and maintained for the Caseware application and templates. If a decision is made to alter these default locations, each PC should be configured for Caseware in an identical fashion.

- The default path to the data folder should be set on each PC.

- Ensure that all applications currently running have been closed.

- From the CW 2023 Program Install bundle, select 'Application'.
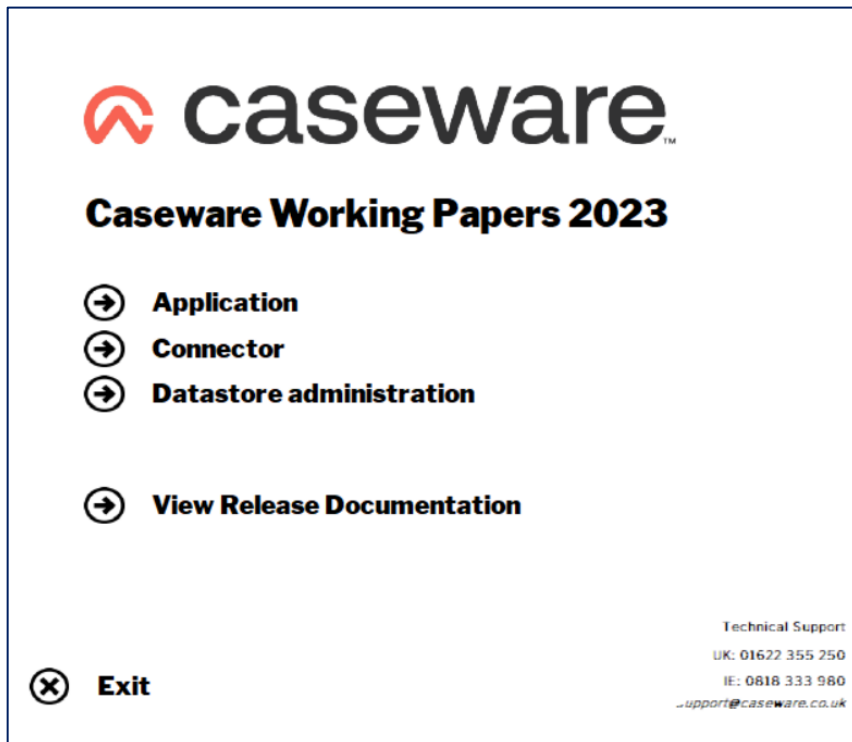
- At the first screen, select 'Next'.
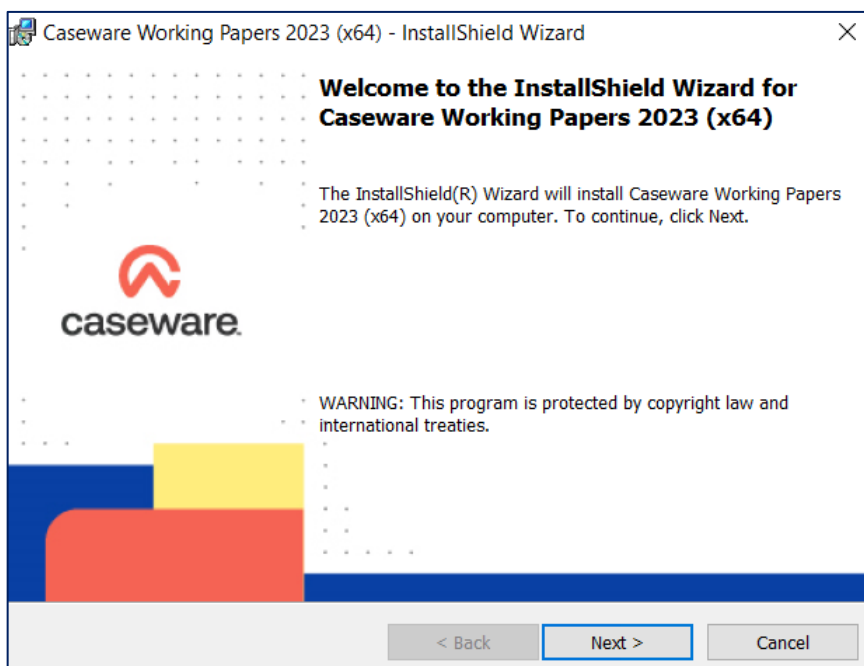
- This will be followed by the Software License Agreement screen.

  You will be required to change the selection to 'I accept the terms in the license agreement' before being able to select 'Next'.
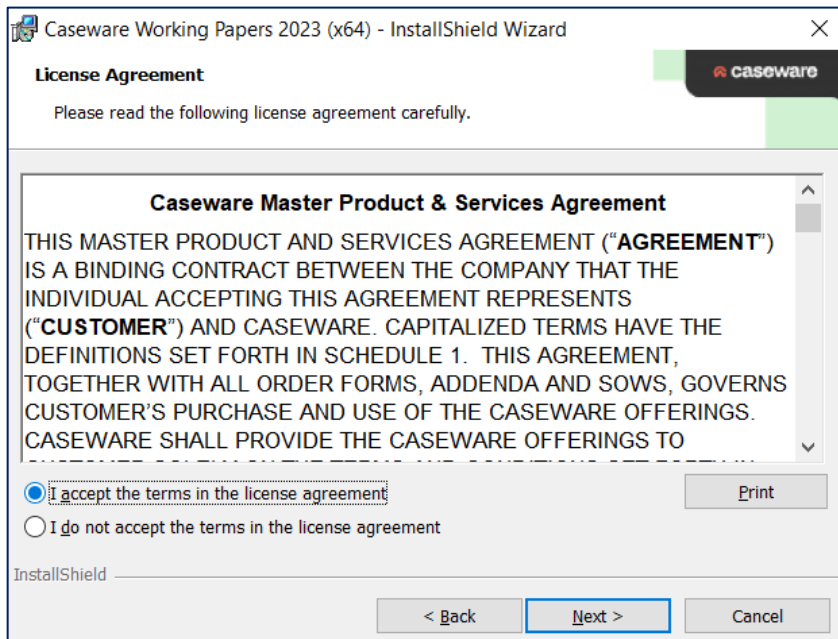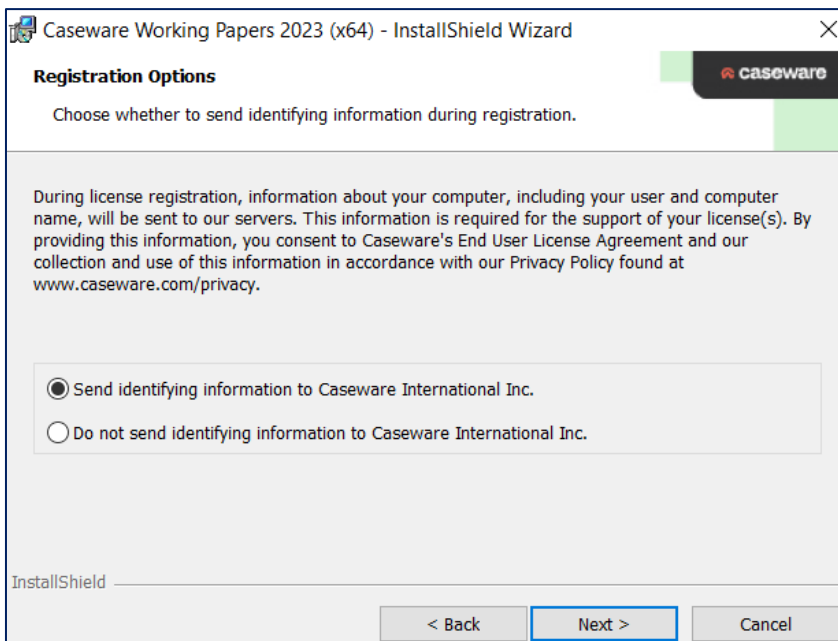
- This is followed by our 'Important Information' screen. Review this and select 'Next' to continue.
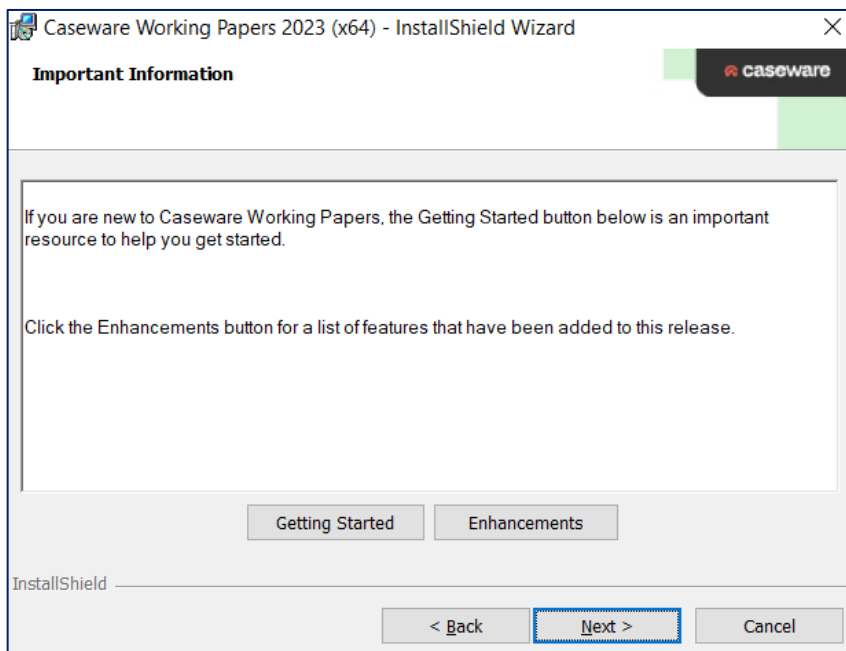
- At the Destination Folder screen, select the directory in which to install Caseware, or select 'Next' to accept the default location of C:\Program Files (x86)\CaseWare\.
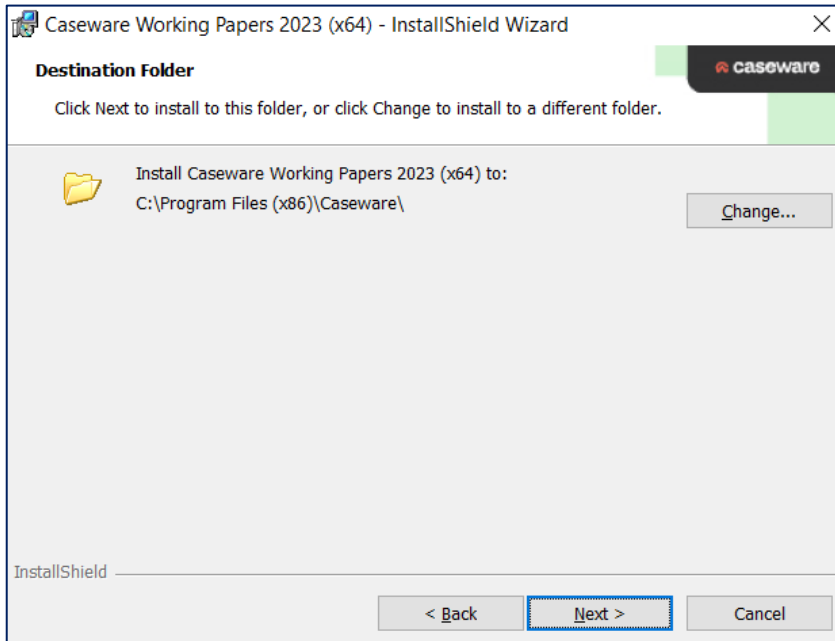
- The following option is **just for Electronic Licence** users:

- Option 1 (This option will identify the computer name on our servers - recommended).
- Option 2 (This option will not identify the computer name to our servers and users will have to give the details to support).

Note: This stage above is for users installing the Electronic version of Working Papers only.

Note: This stage below is for users installing the SmartSync version of Working Papers only.
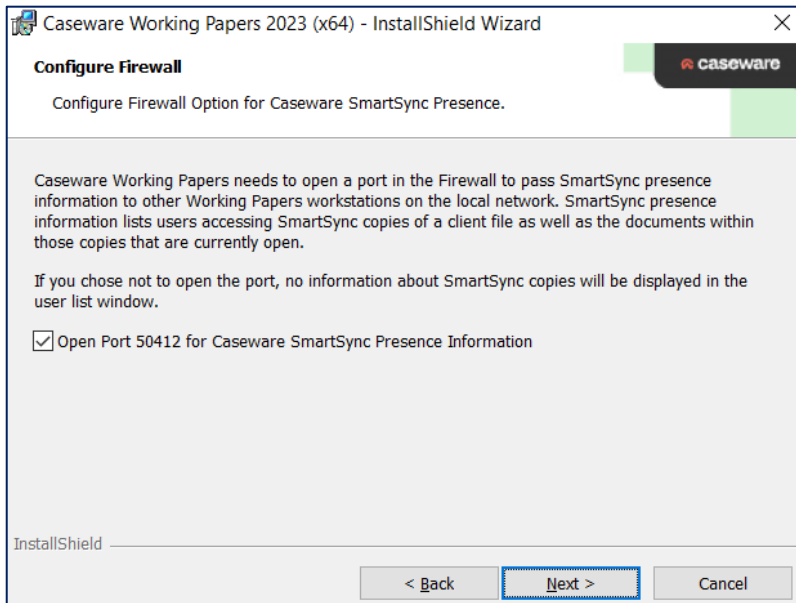
- Ensure the 'Open Port 50412 for Caseware SmartSync Presence Information' checkbox is ticked before selecting 'Next'

- Finally, when you are ready to install the application, select "Install". You can go 'Back' to amend any settings, if required. This will install Caseware Working Papers.
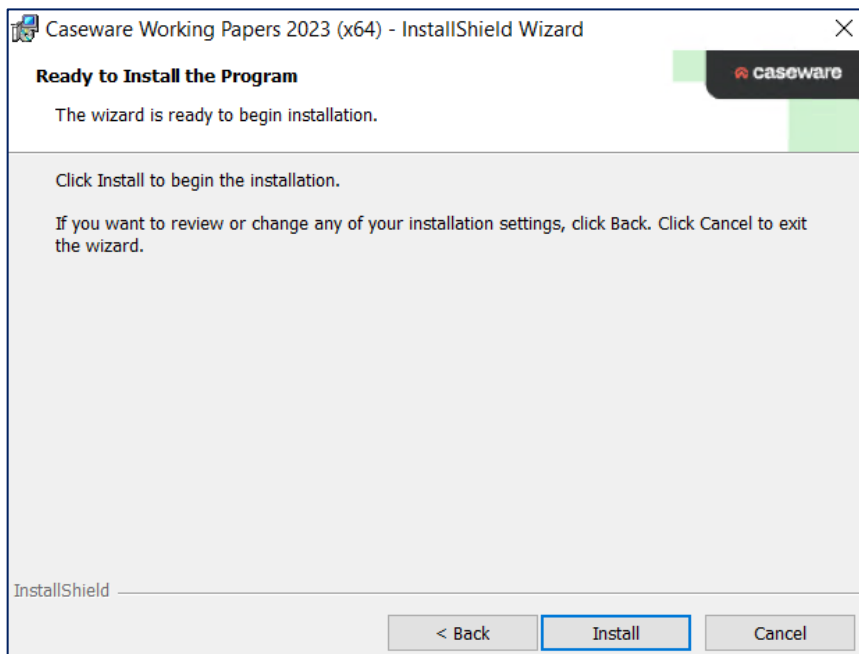
- Once the installation process is completed, click 'Finish' and you will return to the opening menu screen.
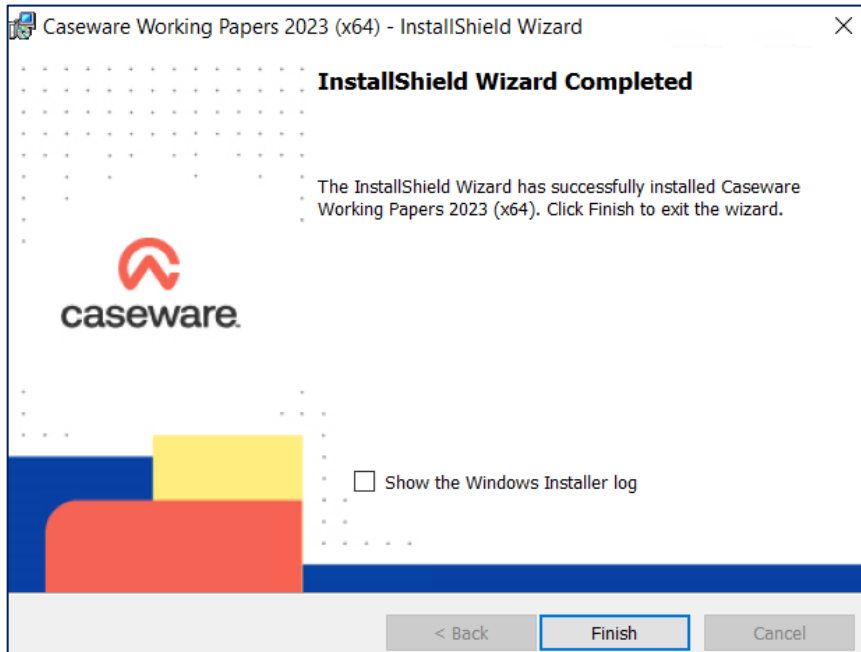
Data store for Caseware

Data such as users and file lists are automatically stored in the local computer the first time that Working Papers is launched. This collection of data is contained in private storage, accessible only to the single user, and is referred to as the Personal Data Store.

Important: Where the storage is private, there is no way to share user lists between computers if this configuration is used. You can import users from the legacy user lists (see Importing Users from Legacy User Lists section) and proceed to use the protection system.

Alternatively, a Data Store can be created and accessed on multiple machines. All users connected to the same Data Store have access to a common set of users, global groups, file list, Tracker settings, and store configuration information.

When using a Data Store, the following features are available:

Integration with Windows Active Directory

Working Papers integrates with Windows Active Directory: it allows for importing of Windows users lists (see the Active Directory Import section). It also allows for authentication of users (e.g. automated verification and logging in of users).

Protection

Protection can be enabled for each client file; however, users connected to a Data Store can be assigned to groups that share the same properties and administrative rights. Groups can be created for specific client files, or global groups can be created for multiple client files.

File Tracking

Working Papers tracks files so they can easily be managed in the Tracker application. When using a Data Store, file information is tracked for each Data Store and can be viewed by all users attached to the same Data Store.

Deciding whether to use a Data Store

Using a Data Store is necessary if one or more of the following hold true:

- You want the protection system on all computers in your firm to have access to a common list of users and global groups.

- You want Tracker on all computers in your firm to have access to a common list of accessed client files.

- You wish to use Global Groups.

- You wish to use the Active Directory features to populate the user list and to enable Windows authentication.

- You wish to use the Security ID feature.

The Data Store is installed and administered as a separate component to Working Papers. For new users, the Data Store Administration Tool can be installed from the Program Install bundle. However, if the tool has already been installed from a previous Program Install bundle, it is not necessary to reinstall it. Full installation and configuration instructions are included in the ReadMe section of the Program Install bundle.

Caseware Help Site

Further information regarding Caseware Working Papers, installation, network installation, customised installation etc. is available on our Help site: https://help.caseware.co.uk