



CaseWare Working Papers 2023

# SmartSync Setup & User Guide

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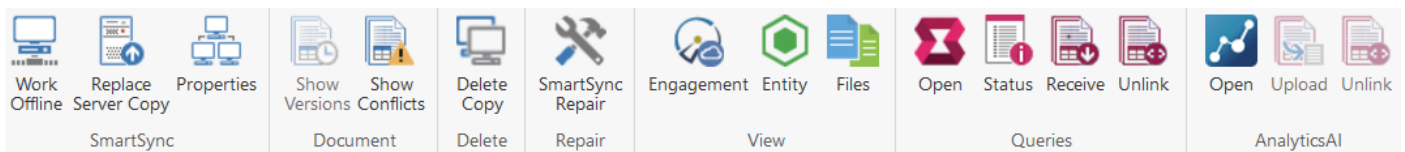
# Introduction

You can host Working Papers SmartSync files on Caseware® Cloud to leverage the benefits of Caseware Cloud and SmartSync Server. In this integrated environment, the top-level parent files are published to Caseware Cloud. Users can then integrate their Working Papers desktop applications with Caseware Cloud to connect and create synchronised copies of these parent files.

This topic discusses how to set up Working Papers with Caseware Cloud and work with SmartSync files hosted on Caseware Cloud. Full guidance on configuration and operating instructions can be found in the online documentation under the ‘help’ option after logging into Caseware Cloud.



Many of the options covered in this guide will be accessible from the Cloud tab of the Caseware toolbar. This will only be accessible on the SmartSync version of Working Papers.



# Integration

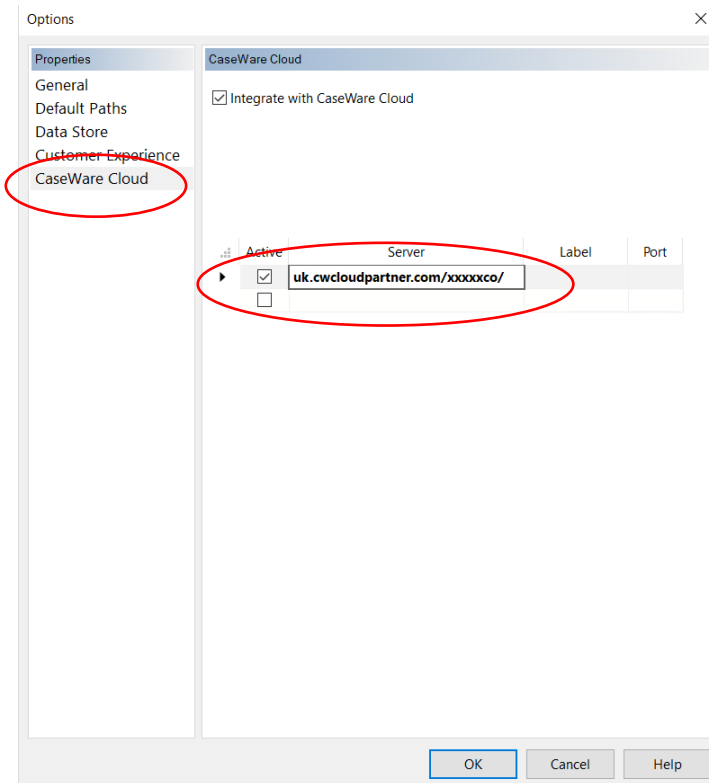
To use Working Papers with Caseware Cloud you must first enable integration with Caseware Cloud from your desktop installation of Working Papers.

## Prerequisites

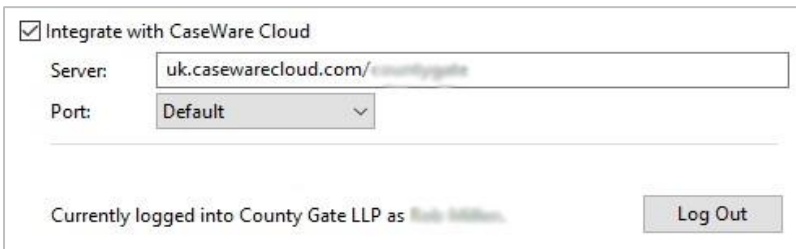
Set up an account on Caseware Cloud and make a note of your firm’s Cloud URL.

## Procedure

- Open a SmartSync version of Caseware Working Papers from your desktop.
- Navigate to ‘Options’ and select ‘Caseware Cloud’.
- Tick the box to ‘Integrate with Caseware Cloud’.
- Enter the organisation specific URL as provided by Caseware Cloud.
- Click ‘OK’.
- Provide user credentials as provided by Caseware Cloud.



Once logged in, a confirmation message will be displayed in the dialogue above:



## Publishing client files to Caseware Cloud

Using the **Publish to Server** feature in Working Papers, you can upload a regular client file onto Caseware Cloud. This file is converted to a SmartSync compatible file and users on the Cloud can create synchronised copies from this file. This file acts as the top-level parent in a synchronised hierarchy.

### Prerequisites

For role assignments, you require one of the following built-in roles (or equivalent):

**Staff:** Editor role on the applicable entity

**Contacts:** N/A

Additionally, your client file must be in a non-sync state. This means that:

1. All existing sync copies are either deleted or abandoned, and
2. The sync log is cleared

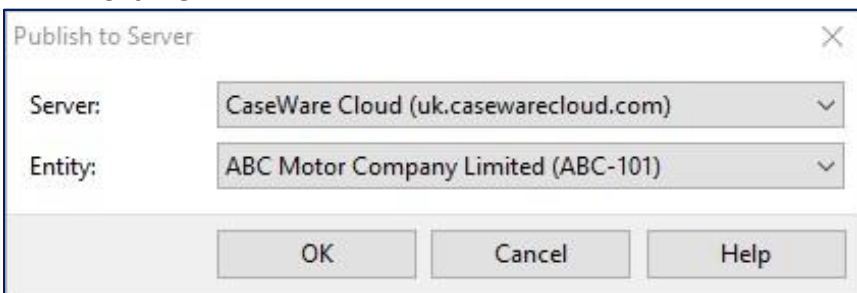
## Procedure

Open the Working Papers application on your desktop

1. Access the publishing dialogue by selecting the 'Publish' button from the 'Cloud' tab:



2. Select the appropriate Server from the drop-down menu.
3. Select the appropriate Entity from the drop-down menu.
4. Click 'OK'.



## Results

After specifying all server and Cloud information, the upload process starts. This process involves the following steps:

1. A copy of the current engagement file is uploaded onto the Caseware Cloud server to act as the top-level parent file in a new sync hierarchy. If applicable, the metadata for this file is extracted by Caseware Cloud and can be viewed from the Files app in the applicable entity on the Cloud.
2. The current file on your machine becomes a synchronised copy of this top-level parent. Your file is now in a sync state with its own `_Sync` folder.

After the publishing process is complete, other users can create synchronised copies from this top-level parent. For more information, see [Creating sync copies from Caseware Cloud](#).

# Creating synchronized copies from Caseware cloud

You can create synchronised copies of client files that are published to Caseware Cloud. The client file must be published to the server in order for you to create synchronised copies from this top-level parent.

There are two methods for performing this operation; opening sync copies using:

1. Working Papers File | Open dialog
2. Working Papers Cloud button & supported internet browsers

## Prerequisites

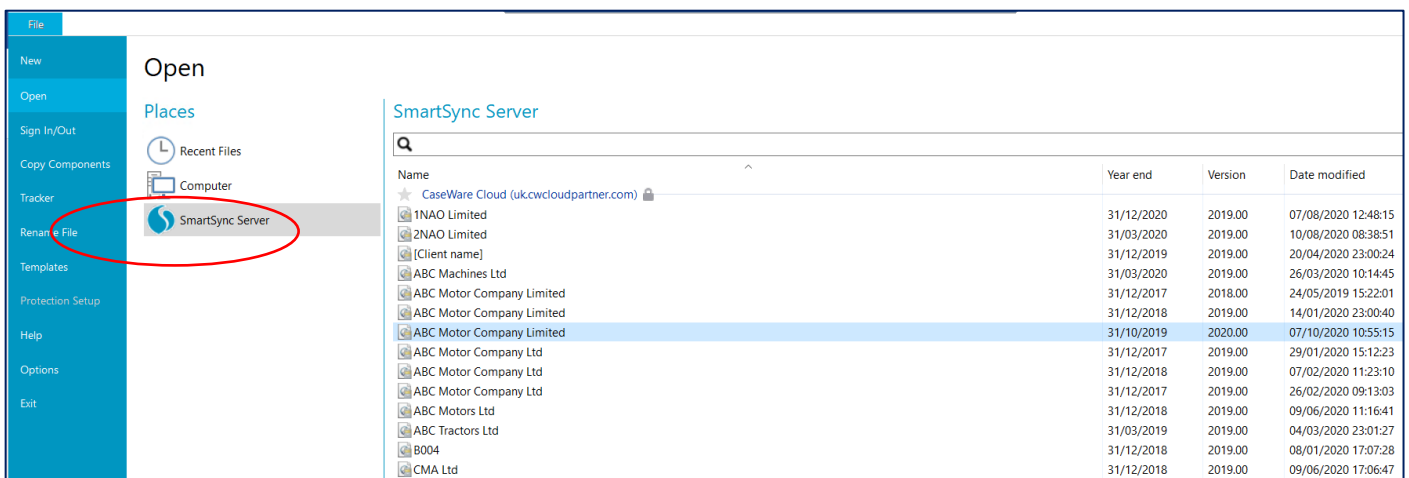
For role assignments, you require the following built-in role (or equivalent):

**Staff:** Viewer role on the Working Papers item

## Procedure (Method 1)

Open Working Papers to perform this operation.

1. Select the 'SmartSync Server' option from the 'Open' menu:

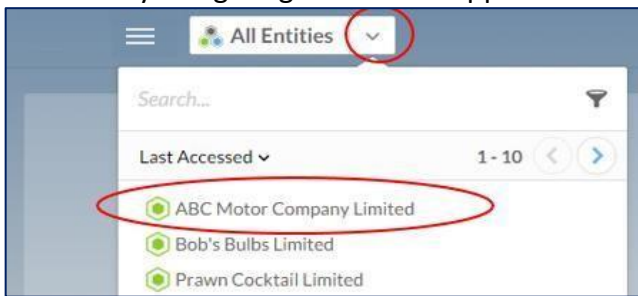


2. Double click on the file you wish to acquire a SmartSync copy of. Use the sorting and search function to help find the engagement file required.

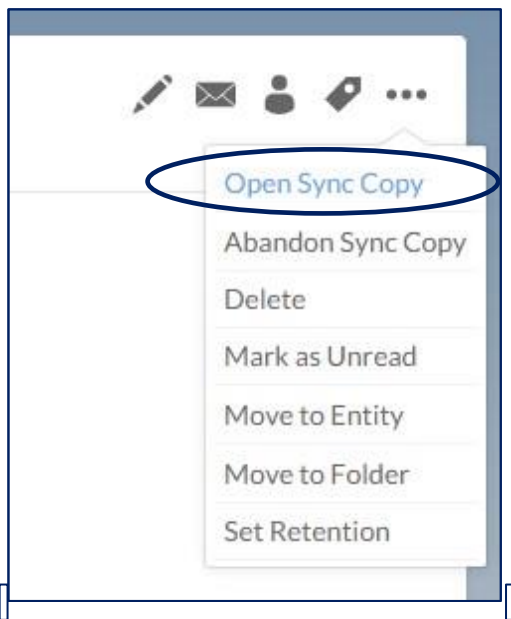
## Procedure (Method 2)

Log on to Caseware Cloud from any supported browser (including using the Cloud button in Caseware):

1. Start by navigating to the Files app and selecting an entity.



2. Select the SmartSync client file to access the file details.
3. Select the button for further options and click 'Open Sync Copy':



4. Allow Cloud to launch your local Working Papers desktop application, if requested.

When using:

- Mozilla Firefox or Microsoft Edge, a pop-up window is opened to perform this command. If pop-ups are blocked, allow pop-ups for the Cloud site.
- In Google Chrome, click Launch Application.
- In Mozilla Firefox, select Caseware Working Papers application and click OK.
- In Microsoft Edge, click Allow.

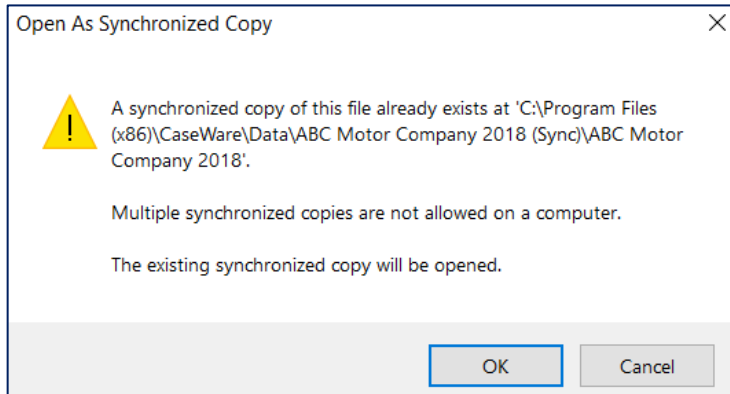
## Results

The selected client file is downloaded and opened in the Working Papers application on your computer. This file is a synchronised copy of the client file you selected.

The sync copy is saved to the SmartSync location defined under **Tools | Options | Default Paths** and automatically opened in Working Papers. You can now work in the sync copy and synchronise changes with the parent file.

## Notes:

If a sync copy of the selected client file already exists on your computer, a message appears indicating you can use the existing copy or create another sync copy:



**Note:** We recommend you use the existing sync copy or delete that sync copy before you create another sync copy from the same parent file.

If the selected client file on Caseware Cloud is a locked-down file or read-only file, a local sync copy is created on your computer, however, any changes to the file will follow lock-down requirements or changes will not synchronise with the parent file unless you have Edit rights to the file.

If you are on a higher version of Working Papers than the selected client file on Caseware Cloud, a message will appear to ask if you want to convert this file to your version of Working Papers. If you select 'Yes', the parent file is then converted to the higher version.

**Important:** After conversion, the parent file will not be accessible to users on lower versions of Working Papers.

# Deleting Synchronized copies from Caseware Cloud

To delete a Working Papers SmartSync file in Caseware Cloud you must first delete any Sync copies in Working Papers and then delete the file from Cloud.

## Prerequisites

For role assignments, you require one of the following built-in roles (or equivalent):

**Staff:** Viewer role on the Working Papers item.

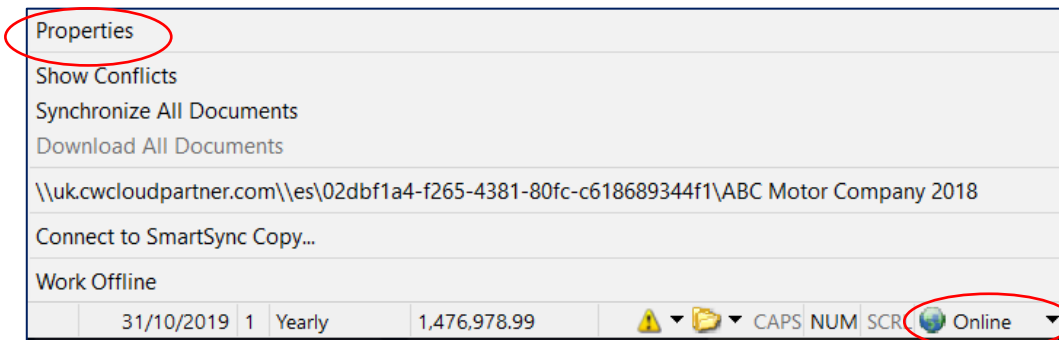


## Procedure

**Note:** It is recommended that you create a local archive of your Working Papers file before deleting the file from the Cloud. The best time to perform this is listed as step 4 in the following guide.

Start by navigating to the Files app and selecting an entity.

1. Open a sync copy of the file as seen in the previous section of this guide.
2. Open the 'Sync Properties':



3. If any Sync copies other than your own exist, contact the other user responsible and ask them to select the 'Delete Copy' button found in the 'Cloud' tab of the toolbar in Working Papers.
4. Ensure at least one local copy is retained (to create one, select **File | Backup** and do not check Include Sync Folders).
5. Now, select the 'Delete Copy' button found in the 'Cloud' tab of the toolbar.
6. Once all local copies have been deleted, browse to the engagement file in the Cloud and select the Delete option found under the further options menu.

**Please note that this option will fail if Sync copies still exist, unless they have been abandoned (see below)**

## Results

The SmartSync copies have been deleted from Cloud.

# Abandoning synchronized copies from Caseware Cloud

Abandoning sync copies separates the file from the parent file and any other sync copies.

## Prerequisites

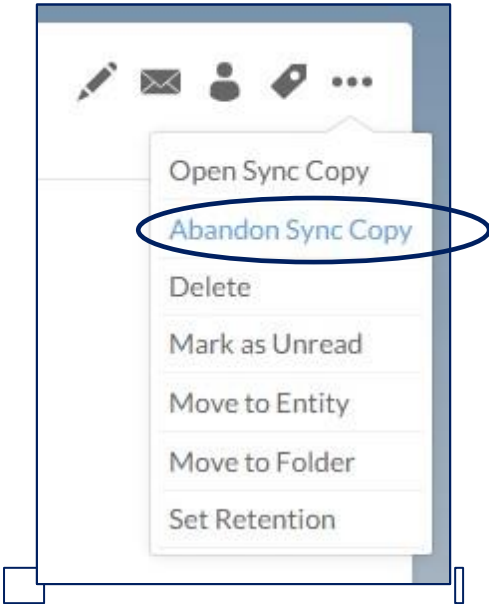
For role assignments, you require one of the following built-in roles (or equivalent):

**Staff:** Viewer role on the Working Papers item.

## Procedure

Start by navigating to the Files app and selecting an entity.

1. Select the engagement file you wish to abandon copies of.
2. From the file details pane, under further options, select 'Abandon Sync Copy':



3. Tick the child copies as appropriate and select OK.

## Results

The file was abandoned from any parent files or other Sync copies. Any additional work completed on abandoned files will not be synchronised to the Cloud or other Sync copies. Similarly, any additional work completed on other Sync copies will not be synchronised across to the abandoned copy.