



Working Papers 2023

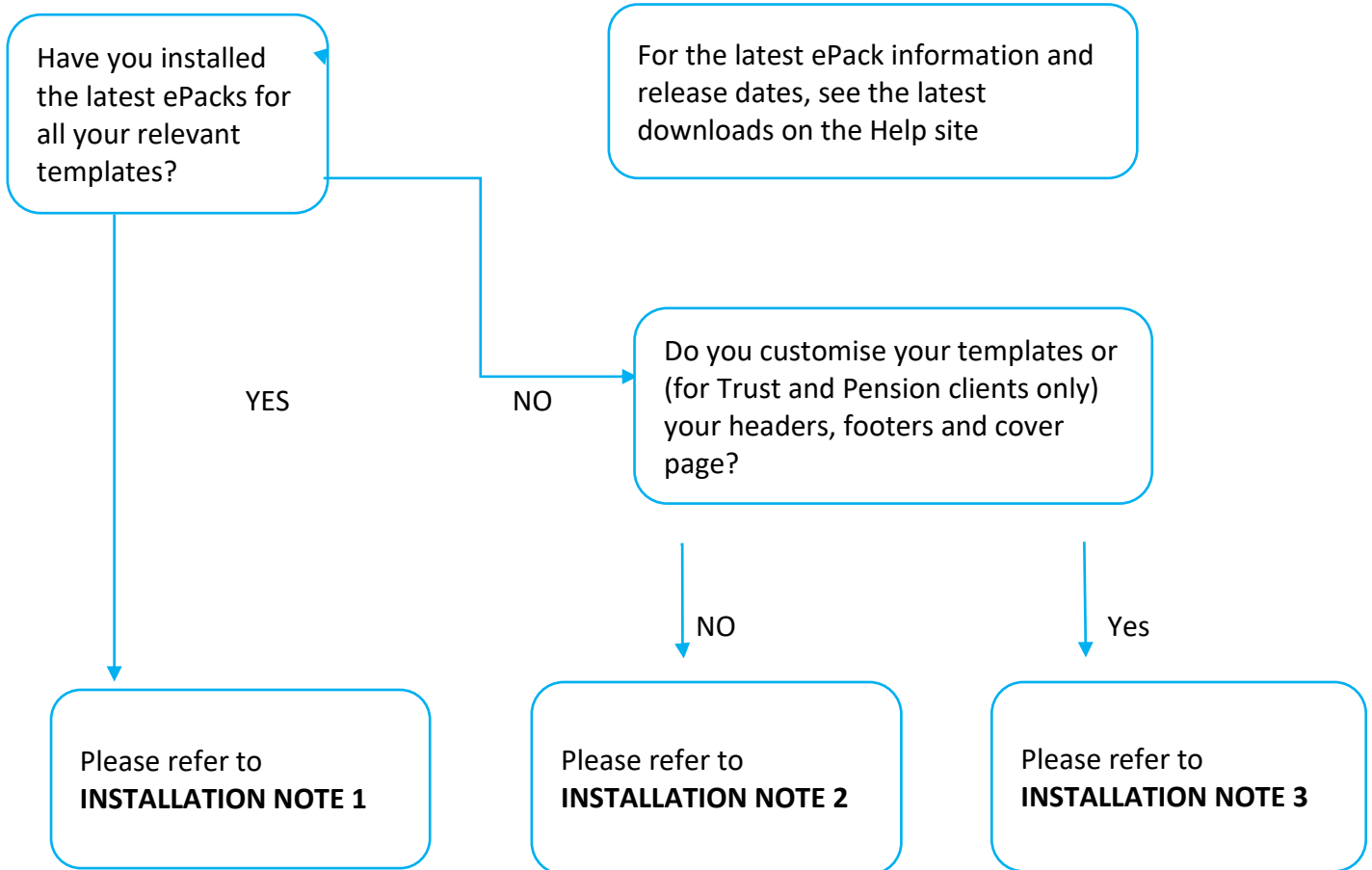
Upgrade Considerations

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The upgrade considerations

Before upgrading to Caseware 2023 please read and consider the following:



Installation note 1

1. Run the program installation on each PC on which Caseware is installed currently.
2. Open and upgrade each of your templates using the new version of Working Papers to update the templates to Caseware version 2023. Caseware Working Papers will prompt to update templates when they are required.

Upgrading templates

1. Open Caseware Working Papers by double clicking on the Caseware program desktop shortcut.
2. Upon opening, select “Templates” from the ribbon on the left-hand side.
3. Open each template in turn (as if they were engagement files), and select ‘OK’ when prompted in the ‘File Conversion’ dialogue (you can, if you wish, automatically save a backup version of the template prior to conversion).

If your firm has a batch file approach to template distribution you will only need to access the network version of the templates. The batch file will then copy the relevant upgraded files to each machine as normal.

After successful installation, users will be prompted to convert client engagements to the new version of Caseware Working Papers. This is a ‘once per file’ upgrade and no data will be lost in this process.

Installation note 2

1. Run the application installation on each PC on which Caseware is installed currently.
2. Run the template installation on each PC on which Caseware is installed currently.

If Caseware is being installed on a machine for the first time and the Accounts and Audit templates are required, please note that the Audit templates and Common Components will need to be installed before the Accounts templates.

After successful installation, users will be prompted to convert client engagements to the new version of Caseware Working Papers. This is a ‘once per file’ upgrade and no data will be lost in this process.

Installation note 3

Installing templates may overwrite your customised settings, so before proceeding, you must take a backup of the following files:

All users:

All relevant template files in the folder ... \Program Files (x86)\CaseWare\Templates

For Pension template users:

In the folder ... \Program Files (x86)\CaseWare\Resources\Knowledge Library\Accounts\...

For Trust template users:

In the folder ... \Program Files (x86)\CaseWare\Resources\Knowledge Library\Trust\...

ZGen-Own cover page.cvw

ZGen-Own footer.cvw

ZGen-Own headers.cvw

In the folder ...Program Files (x86)\CaseWare\Resources\Knowledge Library\Generic\... Trst-FirmSetup.cvw

Procedure

1. Backup files as listed above.
2. Run the application installation on each PC on which Caseware is installed currently.
3. Run the template installation on each PC on which Caseware is installed currently.
4. Restore the files previously backed up to their original locations.

If you customise your own templates, these will need to be upgraded to Caseware Working Papers 2023 using the notes below. After conversion, you will need to use the 'copy components' feature in Caseware to copy in any updates (e.g. new map numbers) from the Caseware UK templates.

Upgrading templates

1. Open Caseware Working Papers by double clicking on the Caseware program desktop shortcut.
2. Upon opening, select "Templates" from the left-hand side ribbon.
3. Open each template in turn (as if they were engagement files), and select 'OK' when prompted in the 'File Conversion' dialogue (you can, if you wish, automatically save a backup version of the template prior to conversion).

If your firm has a batch file approach to template distribution you will only need to access the network version of the templates. The batch file will then copy the relevant upgraded files to each machine as normal.

After successful installation, users will be prompted to convert client engagements to the new version of Caseware Working Papers. This is a 'once per file' upgrade and no data will be lost in this process.

Data store administration tool for Caseware 2023

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 Install bundle. However, if the tool has

already been installed from a previous Install bundle, it is not necessary to re-install it. Full installation and configuration instructions can be found on our Help site.

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>