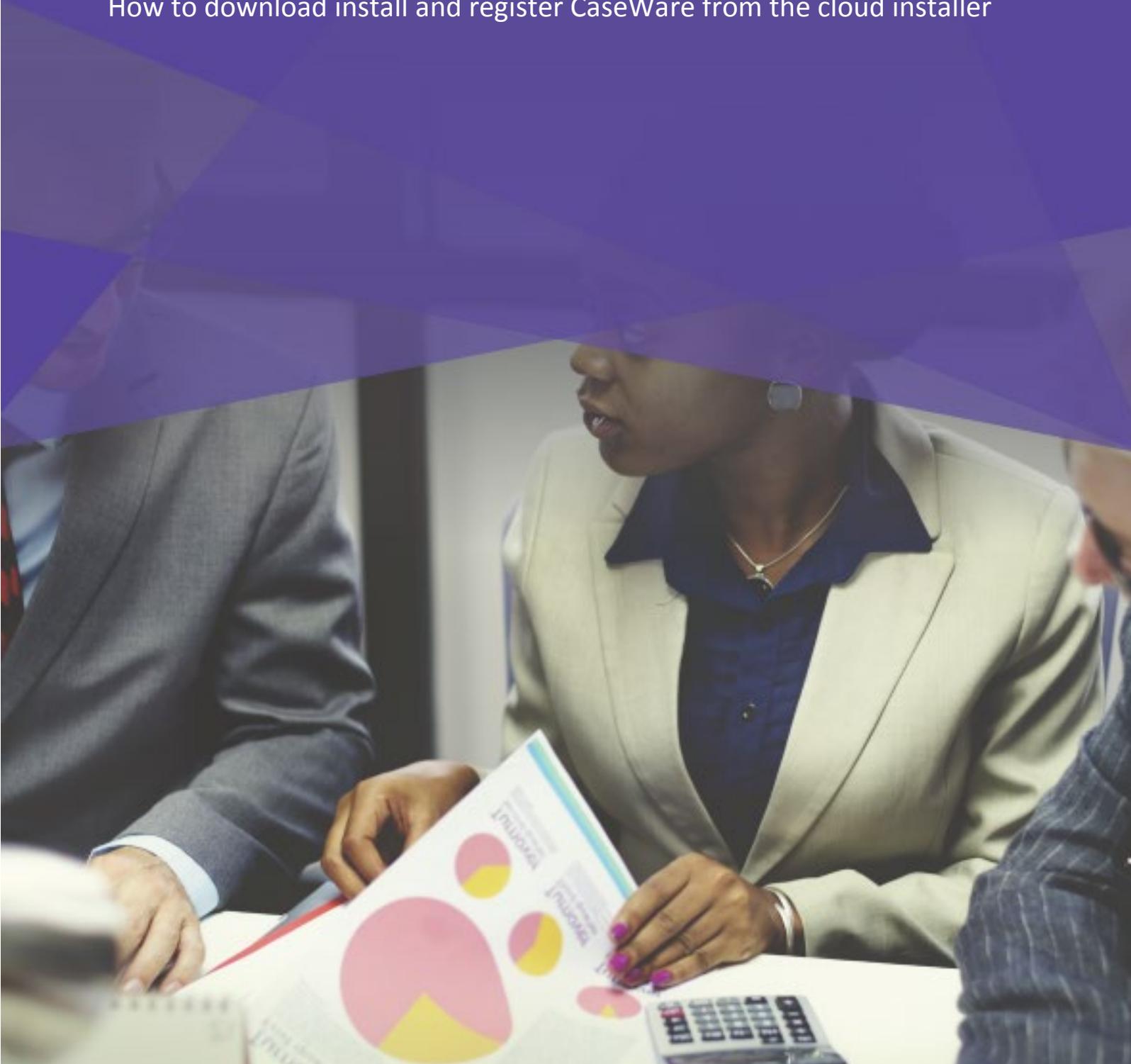




CaseWare Working Papers

How to download install and register CaseWare from the cloud installer



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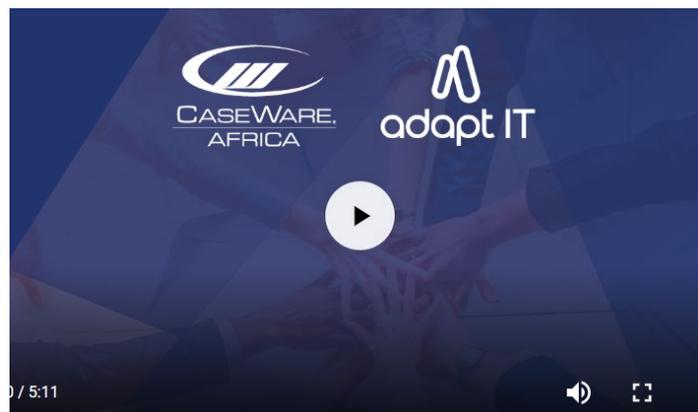
1. Introduction

CaseWare Working Papers' latest release gives you an even higher level of efficiency for all your engagements. We also provide you with an abundance of additional resources to support you and enhance your ability to find the right information quickly and easily.

Use the [CaseWare Africa Success Community](#) to view any of our FAQs, how to articles, user guides and videos to see demonstrations of common procedures in CaseWare Working Papers. This guide serves as your resource companion where we list all the minimum requirements and other useful information to help you establish what it is you need to consider when installing CaseWare Working Papers successfully.

2. Watch this quick video on how to install CaseWare Working Papers

Before you study the below installation guide, we suggest you first watch the short installation video that takes you through the process of downloading, installing and registering CaseWare Working Papers. This video simplifies all the steps needed for a successful installation of CaseWare Working Papers and any of the associated templates.



Click [here](#) to play

3. Prerequisites

We have developed our templates on this updated version of CaseWare Working Papers which is a 64-bit platform to take full advantage of current technologies. This results in continued stability for larger CaseView documents and generally enhanced application performance, as afforded by increased memory in 64-bit architectures.

3.1.1. CaseWare requires a 64-bit Operating System. What do I do if I am on a 32-bit version of windows?

- To be able to run the latest version of CaseWare Working Papers you will need to update your operating system to a 64-bit version.

3.1.2. How do I tell if I am using 32 or 64-bit version of Windows?

Here is a visual representation of what it is you can look for in the Settings section your version of Windows. Detailed instructions for this will be shown further down.



3.1.3. If you are using Windows 7:

- Open Windows Explorer and locate Computer.
- Right-click on Computer and select Properties | Computer Properties will appear.
- Please note that if you are using a 32-bit Operating System, you will not be able to install CaseWare Working Papers.

Note

See [here](#) for important information when sharing files hosted on Windows 7. (Potential file corruption when using Windows 7 or Windows Server 2008 R2 with SMB2)

3.1.4. If you are using Windows 8.1:

- Swipe in from the right edge of the screen, and then tap Search. You can also press the Windows key and type “Settings”. This will display the options on your right-hand side. Click on the Settings option
- Alternatively, if you are using a mouse, point to the lower-right corner of the screen, and then click Search.
- Type System in the search box | click on Settings.
- If you are running a 64-bit version of Windows 8, 64-bit Operating System is displayed in the System type field under the System heading.

3.1.5. If you are using Windows 10:

- Open the Settings app by pressing Windows+I | System | About.
- On the right side, look for the System type entry.
- It will display if you have a 32-bit or 64-bit operating system and if you have a 64-bit capable processor.

4. Minimum requirements needed to install CaseWare Working Papers

4.1.1. Microsoft Windows 10

With Microsoft Windows 10, you would need to ensure that you have CaseWare installed as a minimum requirement. This is because all templates released by CaseWare Africa will only be compatible with 64-bit Operating Systems. If you are unsure, please go to our [Product Updates page on the CaseWare Africa Success Community](#).

Note

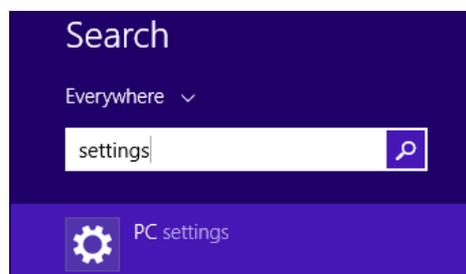
Some firms do not allow Microsoft updates to be done directly from your personal computer as the IT policy determines the use of a Windows Server Update Service (WSUS).

A WSUS is a deployment solution developed by Microsoft enabling administrators of a firm to manage the distribution of updates and hotfixes released for Microsoft products to PCs in a corporate environment. If you have any trouble installing CaseWare or any of the updates, please reach out to your CaseWare champion and or IT administrator.

4.1.2. Microsoft Windows 8.1, with Update

For users that run Microsoft Windows 8, kindly note that you would need to update your Operating System to Windows 8.1. If you are not sure how to do this or how to check if you are on Windows 8.1 already, kindly refer to the below steps.

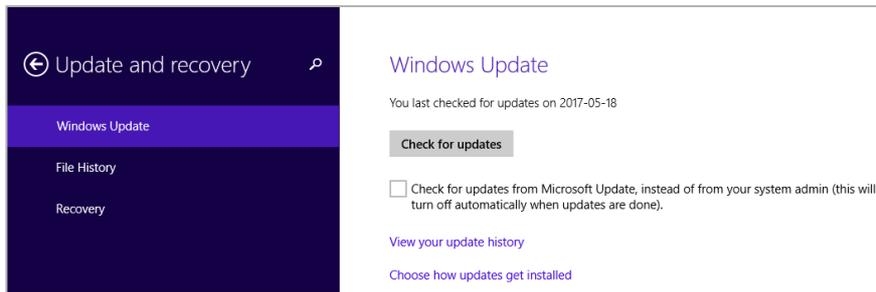
Step 1 – Press the Windows button on your keyboard, type in the word “Settings”. On the right-hand side, you will see a set of results display. Kindly click on the “PC Settings” option.



Step 2 – You will see your setting results display on the left-hand side of your screen. Click on the “Update and recovery” option.



Step 3 – Then click on “Check for updates” and follow the on-screen instructions



Note

Alternatively, click [here](#) to go to the Microsoft website to see if your Operating System is up to date.

4.1.3. Microsoft Windows 7 Professional Service Pack 1 or higher

If your PC runs on Windows 7, please check to see if you have the Microsoft Service Pack 1 (SP 1) installed. Microsoft continuously improves its software and the most notable update to Windows 7 for CaseWare Working Papers is the SP1 update. It includes previously released security, performance, and stability updates for Windows 7. Installing SP1 helps keep Windows 7 up to date and it must be installed for CaseWare Working Papers to function correctly.

To find out more, click [here](#) to access the information listed on the Microsoft website. There are some tutorial videos on YouTube you can also look at. Take note that your PC needs to have sufficient disk space for this Microsoft update. Keep in mind that the disk space mentioned here is in addition to the disk space you would need to install CaseWare Working Papers. Below is an indication of the disk space you need for the installation. Click [here](#) for important information when sharing files hosted on Windows 7.

Installation method	Estimated amount of free disk space required
Windows Update	• x64-based (64-bit): 1050 MB
Downloading SP1 from the Microsoft website	• x64-based (64-bit): 7400 MB
Installing SP1 using an installation DVD	• x64-based (64-bit): 7400 MB

4.1.4. Additional components - Microsoft Office

- Microsoft Internet Explorer 11.0 or higher on most versions of Microsoft Windows, as per the Internet Explorer life cycle.
- Microsoft Office 2007 Service Pack 3, 2010, 2013, 2016, or the desktop version of Microsoft Office 365 (the cloud side is not supported).
- Microsoft Office 2007 Service Pack 3 or greater
- CaseWare Connector also supports the following:
 - Microsoft Office 2016
 - The desktop version of Microsoft Office 365 (the cloud side is not supported)
 - Microsoft Office 2013
 - Microsoft Office 2010
 - Microsoft Office 2007 Service Pack 3 or higher

4.1.5. Additional components - Other

- Adobe Acrobat Reader version 10.0 or higher
- Local administrative rights to the destination machine (I.E. your PC) are required

Note

After 12 January 2016, Microsoft will only be supporting Internet Explorer 11 and higher. Always ensure you have the latest version of Internet Explorer installed.

4.2. Hardware (Personal Computer PC) requirements

CaseWare Working Papers will require up to 1GB of hard drive space for the download and installation yet will require a minimum of 5.5GB total storage. This will be in addition to any space required to update your Windows or Mac operating system. Additional hard drive space is required for templates and engagement files. The size of open client files will vary depending on the features used and the size of documents managed. Working Papers has built-in compression that significantly reduces the size of compressed files.

- Minimum 1GHz 64-bit (x64) processor; 2GHz recommended for improved performance.
- Minimum 2GB of RAM; 8GB recommended for improved performance.
- The Connector program requires 60 MB hard drive space
- The Working Papers programme requires 5GB of hard drive space
- 1024 x 768 minimum screen resolution at normal size (DPI 100%).

Note

A stable Internet connection is required during the installation of CaseWare Working Papers. We recommend an Internet connection such as ADSL or fibre. A 3G/4G or LTE connection is possible but is not always recommended as there could be breaks in the signal and the cost of 3G/4G could be expensive in certain territories. Please be mindful of the download size for those who have a limited Internet bundle.

4.2.1. Security and permissions

- Installation requires local administrative rights on your PC. Please reach out to your CaseWare Champion or IT administrator to ensure you will be able to install CaseWare Working Papers without any hindrances
- The use of CaseWare Working Papers requires read/write access to the program folder and any folders containing client files (this includes CaseWare files stored on servers). Whenever you are not sure about this, please contact to your IT administrator
- CaseWare Working Papers can make use of CaseWare Data Store to allow for central management of staff permissions and facilitates single sign on. Refer to the Data Store installation guide on the CaseWare Africa Success Community for the minimum requirements and steps to implement
- If your virus scanner can exclude files by their extensions, then all Working Papers files should be excluded. The following extensions are associated with Working Papers and can be excluded from virus scans: *.dbf, *.cdx, *.fpt, *.cvw, *.ac, and *.ac_
- If your virus scanner can exclude applications, exclude the following executable files in the Working Papers root installation folder: CWIN32.EXE, CVWIN32.EXE, and CWCS.EXE

4.3. File server/networks

Working Papers Data Store requires Microsoft SQL server running on one of the following supported versions:

- Microsoft® SQL Server® 2016 or SQL Server 2016 Express®.

- Microsoft® SQL Server® 2014 or SQL Server 2014 Express®.
- Microsoft® SQL Server® 2012 or SQL Server 2012 Express®.
- Microsoft® SQL Server® 2008 or SQL Server 2008 Express®.

A file server can be used to store Working Papers client files.

- Operating systems
 - Microsoft Windows Server 2016.
 - Microsoft Windows Server 2012 R2.
 - Microsoft Windows Server 2012.
 - Microsoft Windows Server 2008 R2 with SP1.
- Microsoft CIFS compatible networks like SAMBA on Linux. Please contact CaseWare Support before implementing this type of solution

Note

SP1 is enforced by the installer.

4.4. Call to action | CaseWare Africa sends an email to all CaseWare Champions or firm renewal contacts announcing that CaseWare has a new version

Once a year, CaseWare Africa will communicate to all clients that a new version of CaseWare Working Papers has been released. This email will be sent to you as the CaseWare user, your firm’s CaseWare Champion, Renewal Contact or IT administrator depending on your license agreement. The core function of this email is to introduce CaseWare Working Papers and it contains the link that will route you to the CaseWare Africa Success Community where you will land on the CaseWare Release page.

It will contain all the information you need to install CaseWare Working Papers. Once you are familiar with the process, you will navigate to the “My Software” page where you will find your Download and Authorisation codes as well as the link to download all your software.

Home / Product Updates / CaseWare Working Papers | Release | October 2017 | Version 2017.00.225



CaseWare Working Papers | Release | October 2017 | Version 2017.00.225

Released: 27/10/2017

What's New in CaseWare Working Papers and SmartSync 2017

CaseWare Working Papers 2017 contains new features that will further enhance efficiency and compliance. We have updated our IFRS, IFRS for SME and assurance engagement templates to cater for new and recently amended compliance changes. The updated templates and CaseWare Working Papers 2017 have been built on a 64-bit platform to take full advantage of current technologies.

Please note that this release comes with new IFRS, IFRS for SMEs, Probe MMX, MFMA NT and GRAP templates. You will find links to the template pages below, but please be aware that CaseWare Working Papers 2017 is a prerequisite for your new templates to work. A link to the CaseWare Working Papers 2017 installation guide is also provided under installation instructions.

CaseWare Working Papers 2017

- **Adjusting Journal Entries:** Scrolling in the Adjusting Entries screen is now possible in a locked down file in order to view all line entries.
- **Auto Publish:** To simplify the transition to a new year, a new Auto-Publish feature is available for existing Cloud-integrated files when performing a year-end close (YEC).
- **Mapping and Grouping Search:** Assigning mapping has been simplified with additional search options in both the Unmapped accounts and Mapping numbers sections.
- **Performance:** Importing large trial balances is significantly faster.
- **Recent File List:** New options have been added to the right-click context menu to simplify maintenance of recent files (Remove from the list and Clear unpinned files).

SmartSync

- **Improved Word and Excel conflict management:** the expanded exclusive lock function is enabled, modifications to the opened document are exclusive to the user.
- **Enhanced Prevention of data-loss:** when clearing out child copies, SmartSync child copies now automatically check for and transmit any missed synchronization events before they can be deleted.
- **Enhanced Document management:** SmartSync copies will no longer be deleted when documents are still open. A warning message will now appear when attempts are made to delete a sync copy with open documents.



[Login](#) to access this **download**.

[Install Instructions](#)

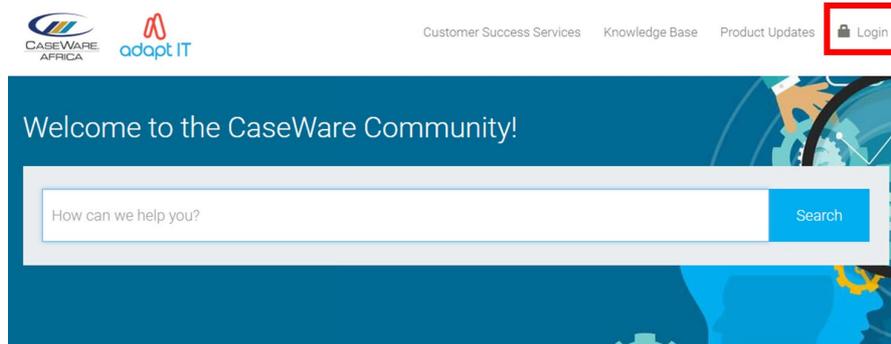
Release Notes

For more detailed information on these and other enhancements to the software, please go through our Release Notes.

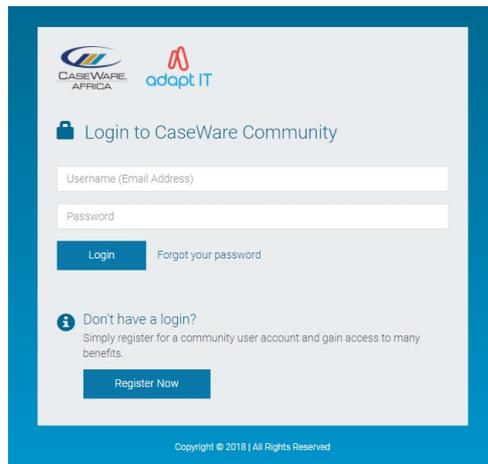
[Download Release Notes](#)

4.5. How to access your installation packager from the CaseWare Africa Success Community's "My Software" section

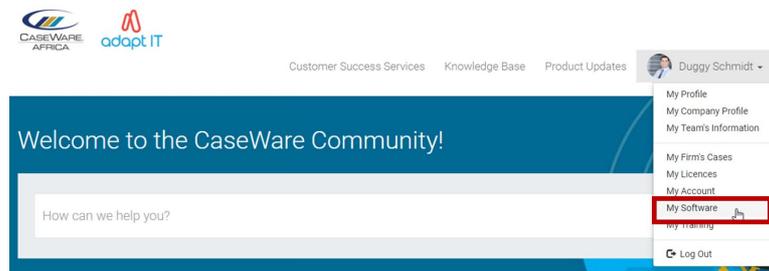
Step 1: To access your "My Software" page (Where your software download is, including your codes). Open the URL: <http://success.casewareafrica.com/> and then click on "login" top right. You or your champion would need to log into the community and go to the "My Software" section. There you will find your firm's Download code, Authorisation code and the link to initiate the installation packager.



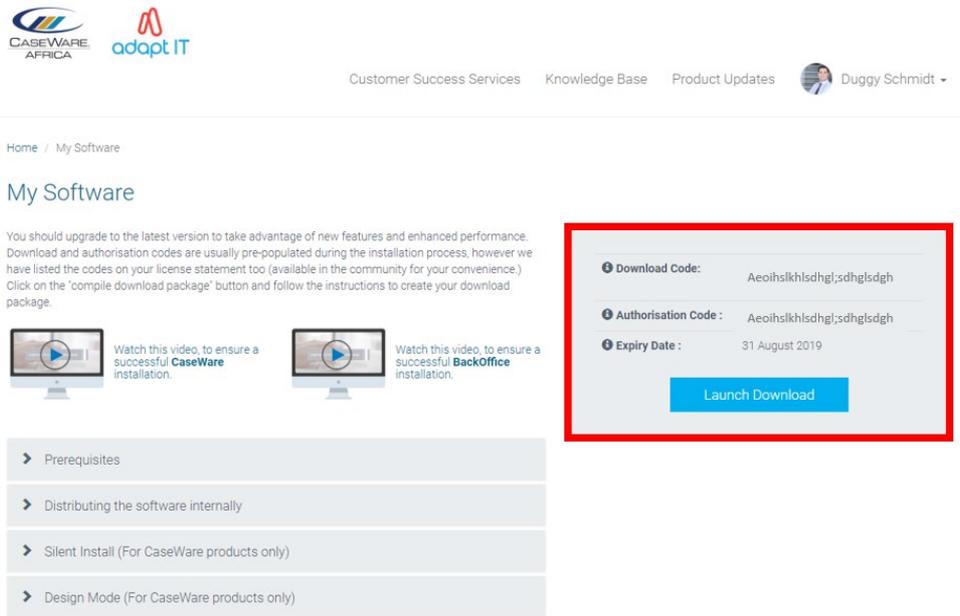
Step 2: Fill in your username and password (If you don't have an account yet, click on "Register now")



Step 3: Once logged in click on the dropdown menu top-right and select the "My Software" option



Step 4: This will bring you to the “My Software” page. Here all the information is listed that you will need to install CaseWare Working Papers and the templates your firm uses. On your right, you will see your download packager button. For your convenience, the Download Code and Authorisation Code is listed.



Note

4.5.1. What you need to know about the installation codes

Throughout the CaseWare Working Papers download, installation and registration process, it is important to keep track of which codes are used when. All codes will be listed under the “My Software” section of the CaseWare Africa Success Community. If for some reason the codes do not populate automatically, you can refer to them here. Simply copy and paste the codes into the relevant fields. Here is a quick and easy outline that simplifies the different terms used to identify the various codes.

4.5.2. Download code

Your Download code is only used when you download your software and in certain places in the installation wizard.

Download Packager

Step 1: Enter Download Code | Step 2: Select Apps | Step 3: Download Package

Please enter your email address & download code below. Your code is available in [The Community](#) on the My Software page. If you are not sure about this process, watch [this Quick Video](#).

Download Code:

User Email:

4.5.3. Authorisation code

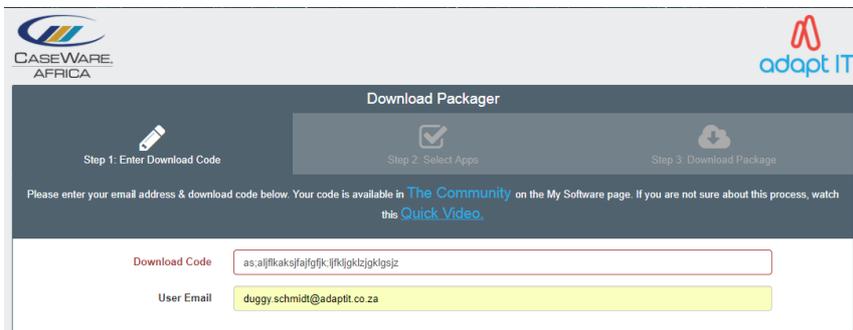
You would need this code after you have downloaded and installed CaseWare. The authorisation code is required at the end of the installation process whereby you now register your instance of CaseWare Working Papers. The purpose of this code is to ensure

that your license is protected and strictly assigned to you and your firm. Keep the checkbox unticked.

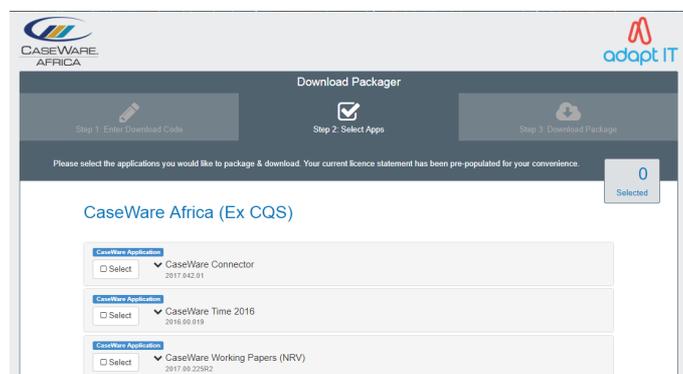


Step 5: Click on the “Launch Download” button to begin the download of your CaseWare Installation Packager.

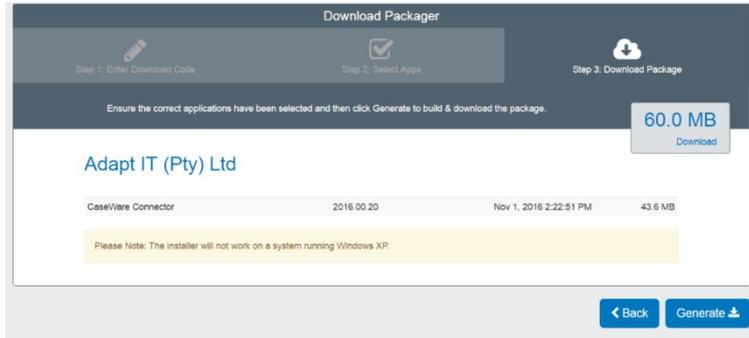
Step 6: This will take you to the Download Packager screen. Type in your own personal email address. Then click next:



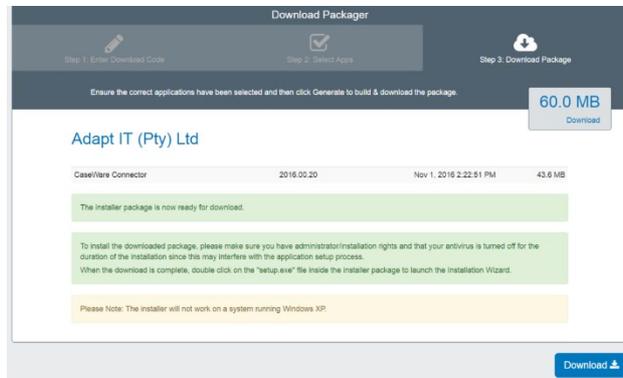
Step 7: Select the CaseWare Working Papers option and the templates that apply to you. Then click on the “next” button.



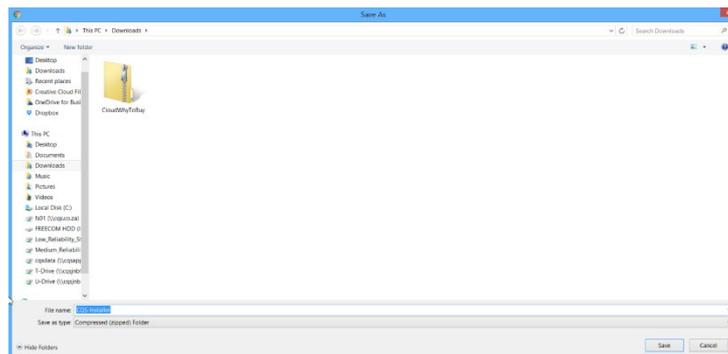
Step 8: You will be able to “Generate” your download package, by clicking on the “Generate button”. Depending on your Internet speed, this might take a while.



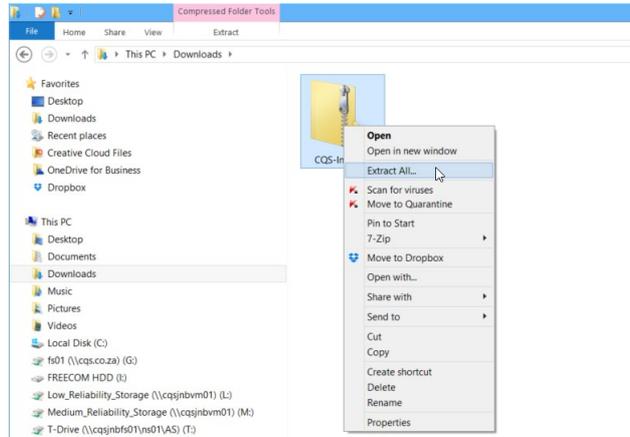
Step 9: Once your package is generated, click on the “Download” button.



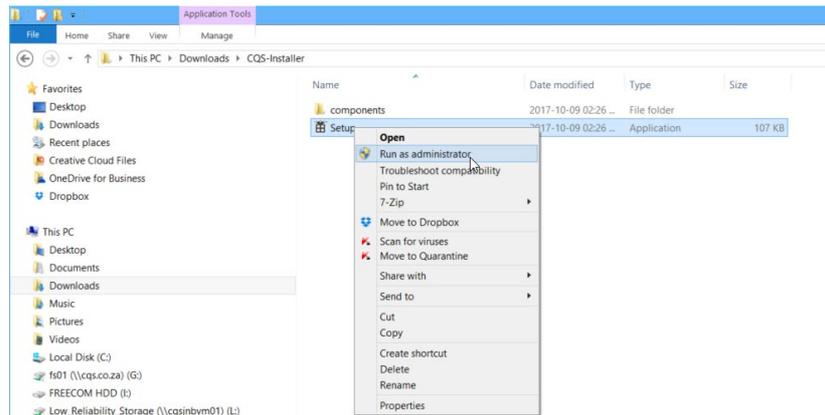
Step 10: Save the CaseWare Working Papers Setup file on your PC, server or network. Should this be for multiple users the location of the file needs to be accessible as this is the place they will consult to initiate the installation process.



Step 11: Right click on the install packager you just downloaded and extract all the files. This is done by right clicking on the file and selecting the Extract All option.



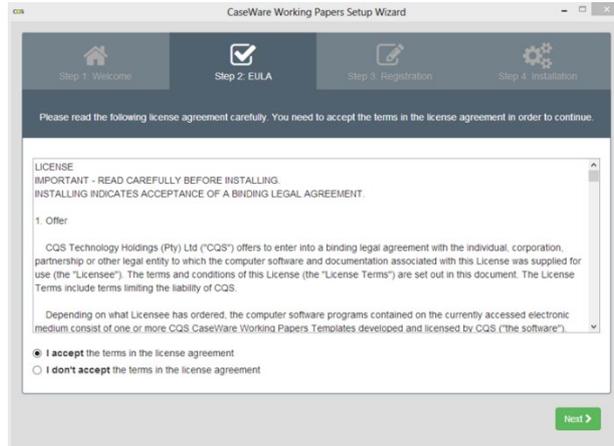
Step 12: Open the unzipped folder and right click on the “Setup” file and select the “Run as administrator” option. This will initiate the “CaseWare Working Papers Setup Wizard”.



Step 13: The welcome screen appears. Click on the “Next” button to proceed.



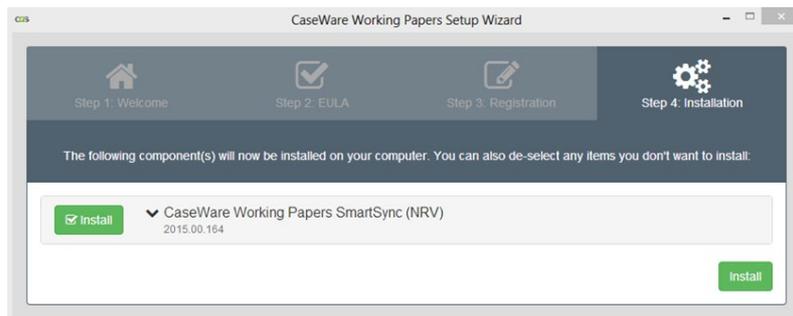
Step 14: Accept the terms and conditions and click on the “Next” button to proceed.



Step 15: The registration dialogue appears. Type in your email address. Notice that the “Next” button only appears once a valid email address is supplied.

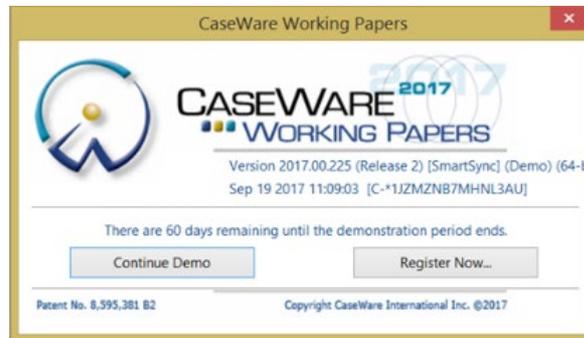


Step 16: Ensure that all your products and templates are selected. Then click on “Install”.



Step 17: Your installation is almost complete. Once the files are installed, you register your software to complete the entire installation process. If CaseWare doesn't automatically open, simply go to your desktop and double click on the CaseWare icon because you need to register your CaseWare to finish the installation process.

When CaseWare opens for the first time after installation you will see the registration dialogue box. Click on the “Register now...” option. Note that this will only apply to users that are installing CaseWare Working Papers for the first time or existing users with expired CaseWare licenses. If you opt to continue demo, it will only be valid for 60 days. It’s is recommended to register immediately.



Step 18: The “About Licensing” dialogue box will appear. Select the “Stand Alone Licensing” option and click on “Register now”. This will initiate the “CaseWare Working Papers Registration” Wizard.

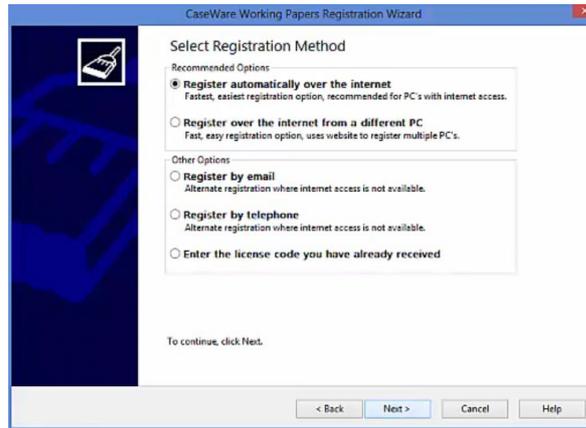


Step 19: Welcome screen. Populate the “Authorisation Code” found in the “My Software” section of the CaseWare Africa Success Community (if not automatically populated):

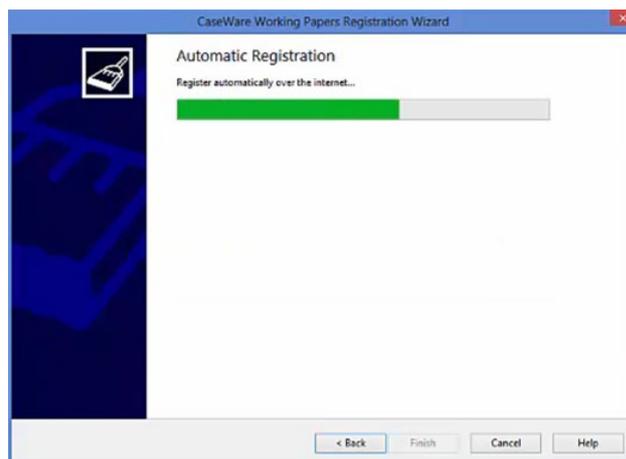
- Type in your name
- Type in your email address
- Click on the “Next” button



Step 20: Select the “Register automatically over the Internet” option and click on “Next”.



Step 21: Once your registration is complete, you can click on Finish. Your software has been successfully installed and or updated.



Note

If the “Register automatically over the Internet” option gives you an error, please contact the Support team to talk you through the manual registration process. This is usually caused by your firm’s firewalls blocking access to the CaseWare eLicence server. You can also try to lose the wizard and go back to the Setup file and try to double click again to go through the Setup Wizard a second time. A bad Internet connection can also be a possible cause.

4.5.4. What you need to know about Site License Management (For firms that run large teams of CaseWare users that use the Silent Install process)

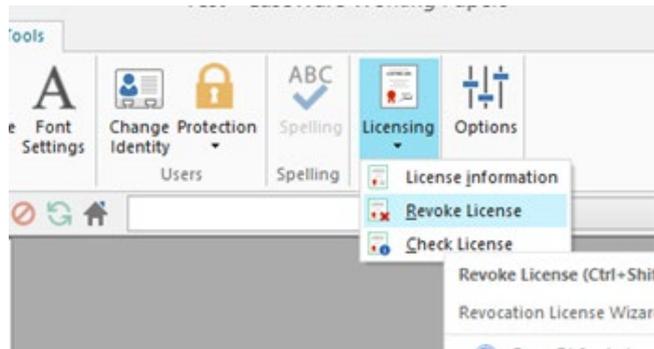
CaseWare uses Site Licenses as opposed to single user authorisation code for firms with multiple CaseWare Working Papers licenses. Site licenses therefore make use of a single Authorisation code for your entire firm. You will not need to have different authorisation codes for each of your firm’s CaseWare user’s.

As a result, this reduces complexity and will make tracking easier as you do not need to track each Authorisation code associated with a specific user's PC. For firms that make use of Site Licences, please refer to the knowledge base article on the CaseWare Africa Success community to carefully take into consideration what it is you need to keep in mind when administering your firm's Site License. [Click here](#) to access the article on the community.

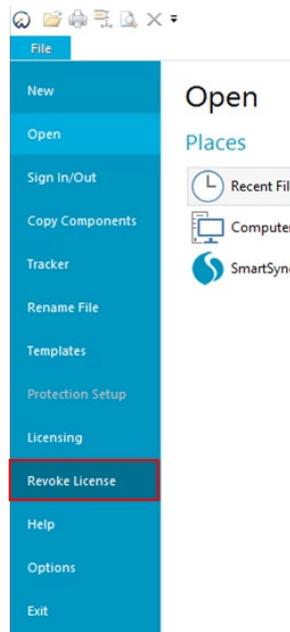
5. License Revocation - What if you need a CaseWare license to a new user or new PC

The License Revocation process has been implemented to allow for CaseWare licenses to be returned to the license server where they can either be reused or cancelled. As firms deal with staff joining or leaving, they also need to be able to transfer those licences to the people that need it.

It is recommended to revoke licenses from any PCs of an existing user that could be affected so that you can transfer it to another user. It is known as the license revocation process. To start, go to the Tools tab, in the Licensing group, click Licensing | Revoke License or press Ctrl+Shift+R to open the License Revocation Wizard.

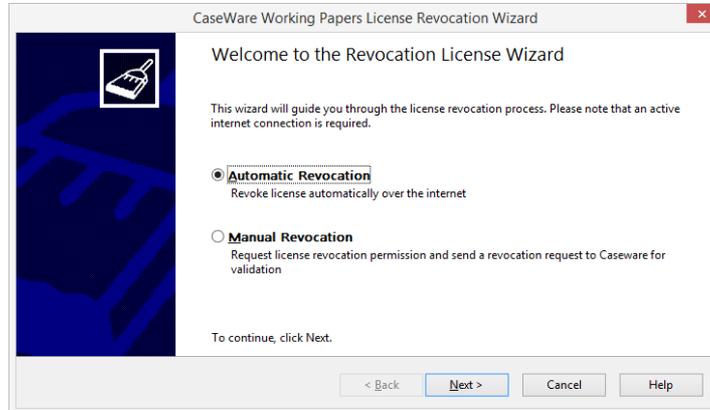


Alternatively, you can find the option under the file view:

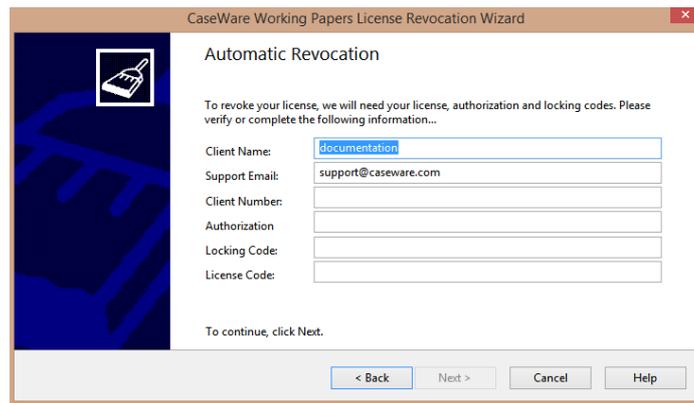


5.1.1. Automated Revocation Process

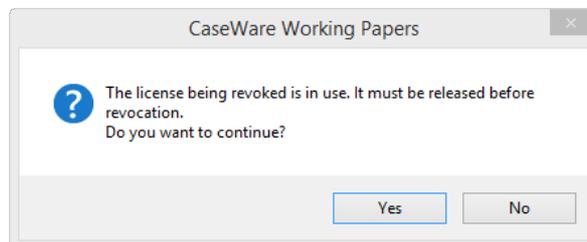
Select the automatic revocation option which is the recommended method of revoking the current license. Click Next to proceed.



Fill in the applicable fields and click Next. For the automatic revocation CaseWare will automatically populate these details, but if you are revoking someone's license you would need to change the locking code.



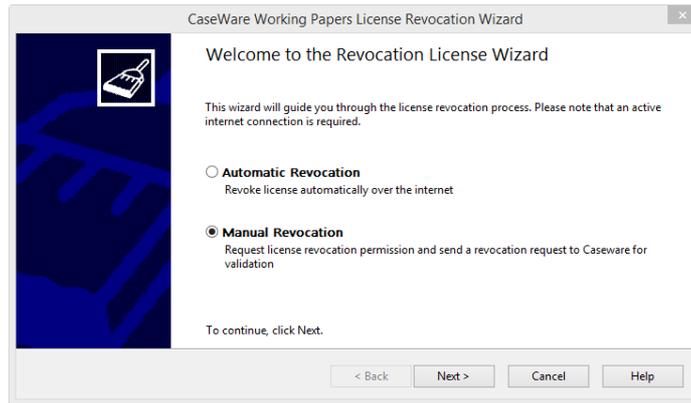
Click "YES" to automatically revoke the license over the Internet.



5.1.2. Manual Revocation Process

The manual revocation process will require a ticket to be issued to revoke the license, this is done via email to your Account Manager.

- Select the manual revocation option and click Next to proceed.



- First step is to acquire revocation permission from CaseWare Support.



- Fill in the applicable fields and click Next to send and acquire a permission ticket from CaseWare support.



- Once you acquire the permission ticket from support, select Revoke License.



- Browse and locate the permission ticket or type the permission string in the field provided.



- Click Next to complete the revocation wizard.

6. Need help? Access the CaseWare community

To ensure we support you effectively, we have developed the CaseWare community to help you find all your CaseWare resources in one place. Here you will find all our product updates, FAQs, how to guides and videos on a wide variety of topics. To access the community, [click here](#). Remember to visit this community frequently because the resources are updated regularly.

Contact Us

Main Contact Details

Adapt IT Reception

+27 10 494 1000

Help Desk Direct Extension

E-mail CaseWare Support

support@casewareafrika.co.za

Other Important Details

Register at <https://success.casewareafrika.com/> for easy access to frequently asked questions, upgrades, downloads and technical documentation.

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[CaseWare Africa – South Africa](#)