

Caseware Working Papers

How to register, install and download

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1. Introduction

Below you will be given all the steps needed to achieve a successful installation of your latest CaseWare Working Papers and the Templates that you use. Here we will outline the minimum requirements and other useful information to help you establish what it is you need to consider when installing CaseWare Working Papers successfully.

1.1. How to video - Installing 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.



2. System Requirements

2.1. Workstations

2.1.1. Operating Systems

2.1.1.1. Microsoft Windows 10 64-bit (x64)/ Windows 11 64-bit

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.

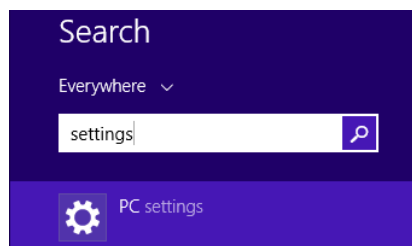
Note:

- 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.

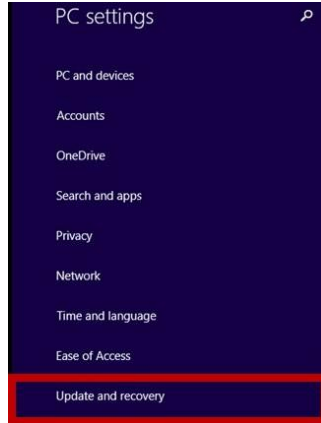
2.1.1.2. Microsoft Windows 8.1 64-bit (x64)

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.

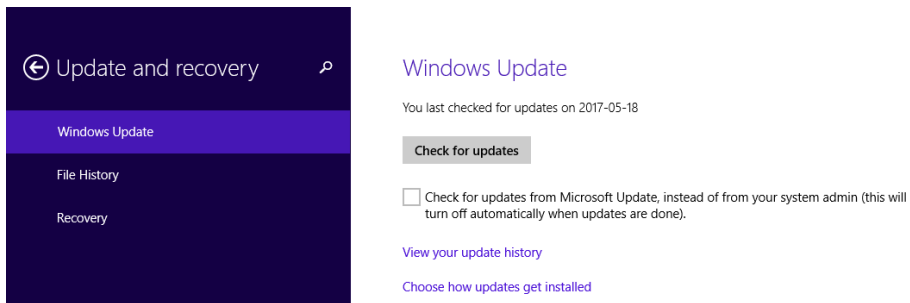
Step 1 – Press the Windows button on your keyboard, type in the word “Settings”. On the right-hand side, you will see a set of results display. Kindly click on the “PC Settings” option.



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 for Windows 8 users, click [here](#) to go to the Microsoft website to see if your Operating System is up to date

Note: Microsoft Windows 7 Professional Service Pack 1 or higher is no longer supported

2.1.2. Below is an indication of the disk space you need for the installation

Windows Update

- x64-based (64-bit): 1050 MB

Hardware

- 1 GHz 64-bit (x64) processor; 2 GHz recommended for improved performance
- 4 GB of RAM; 8-16 GB recommended for improved performance
- Solid-state drive (SSD) recommended for optimal performance
- Minimum 1 GB free disk space recommended for installation
- Internet connection required during installation

Note: Additional disk 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.

Additional Components

- Microsoft Office 2010 or later, or Microsoft Office 365 (Desktop version, Cloud is not supported)

- Internet browser that supports TLS 1.2 or later (see [Disabling access to CaseWare Cloud for older and unsupported browsers](#) for more information)
- Adobe Acrobat Reader 10.0 or later.

Note: CaseWare Connector is compatible with both Office 32-bit and 64-bit, however a 64-bit Operating System is required.

Security and Permissions

- Installation requires local administrative rights on your workstation. 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 faster. The following extensions are associated with Working Papers and can be excluded from virus scans: *.dbf, *.cdx, *.fpt, *.cvw, *.ac, and *.ac_
- If you are running Working Papers behind a firewall or proxy, ensure that you whitelist the following servers:
 - Amplitude Web Server
 - <https://elicense.caseware.com>
 - <https://elicense2.caseware.com>

2.2. SQL Server Requirements for SQL Data Store

The Data Store Administration Tool can use a Microsoft SQL back-end to store data. Working Papers (using a SQL Data Store) is compatible with the following SQL products:

- Microsoft SQL Server 2019 / Express
- Microsoft SQL Server 2017 / Express
- Microsoft SQL Server 2016 / Express
- Microsoft SQL Server 2014 / Express
- Microsoft SQL Server 2012 / Express

2.3. File server/networks

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

Operating Systems

- Microsoft Windows Server 2022

- Microsoft Windows Server 2019
- Microsoft Windows Server 2016
- Microsoft Windows Server 2012 R2
- Microsoft Windows Server 2012
- Microsoft CIFS compatible networks like SAMBA on Linux

Note:

- For Windows Server 2012, you must set TLS 1.2 as the default protocol. Follow the instructions provided by [Microsoft to download the necessary update](#), then apply the "Easy fix" solution.
- Contact the CaseWare Africa Support or Consulting team before implementing a CIFS compatible network solution.

Hardware

- Per file server/network operating system recommendations

2.4. Citrix/Terminal Servers

Operating System

- Microsoft Windows Server 2022 with Citrix/Terminal Services
- Microsoft Windows Server 2019 with Citrix/Terminal Services
- Microsoft Windows Server 2016 with Citrix/Terminal Services
- Microsoft Windows Server 2012 R2 with Citrix/Terminal Services
- Microsoft Windows Server 2012 with Citrix/Terminal Services

Hardware

The server hardware configuration should be scaled for the number of user sessions. We suggest the following specifications for optimal performance:

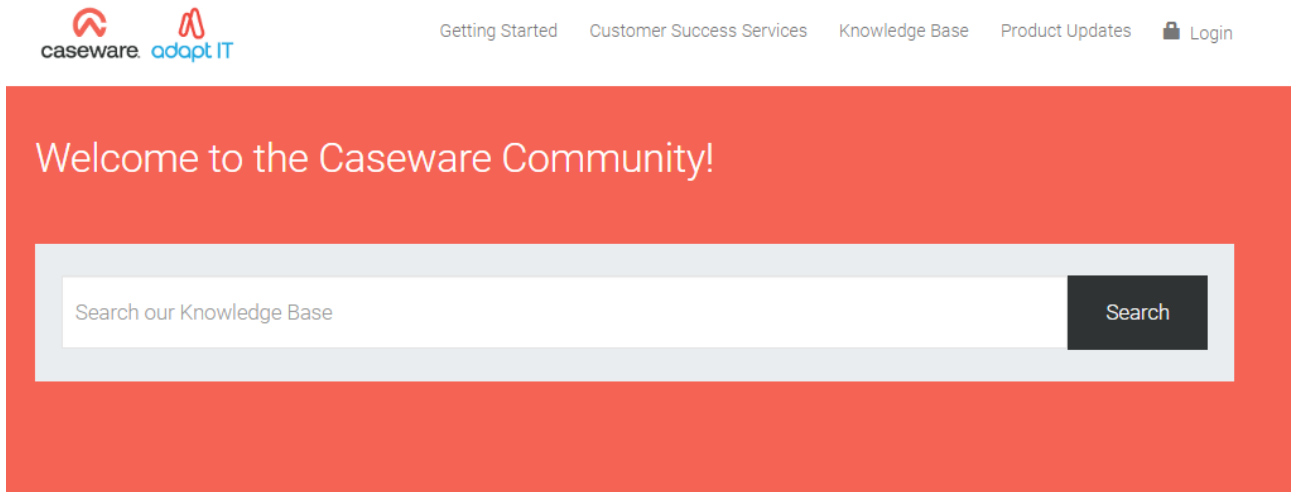
- 1 CPU core per user session
- 8GB RAM per user session
- 80GB disk space per user session

Note: Working Papers files should be stored on the Terminal/Citrix Server or connected to it via a high-speed network connection.

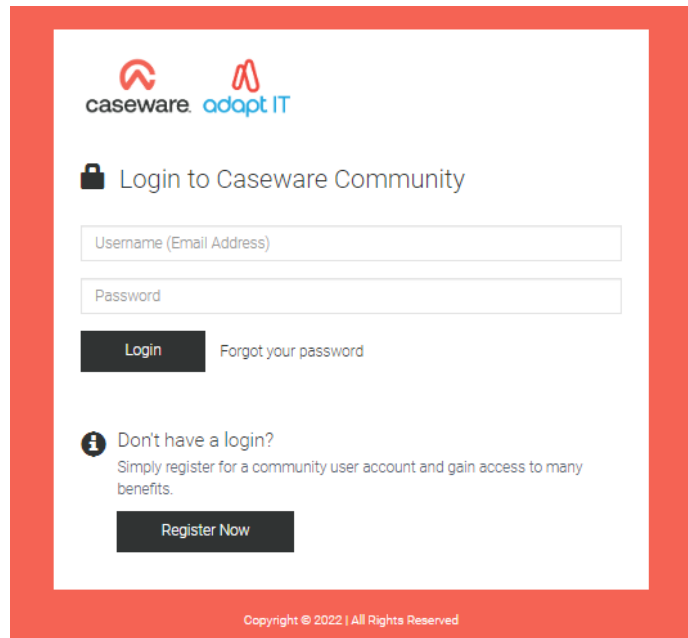
3. Accessing your software from the CaseWare Africa Success Community

Step 1: To access your “My Software” page (Where your software download is, including your codes).

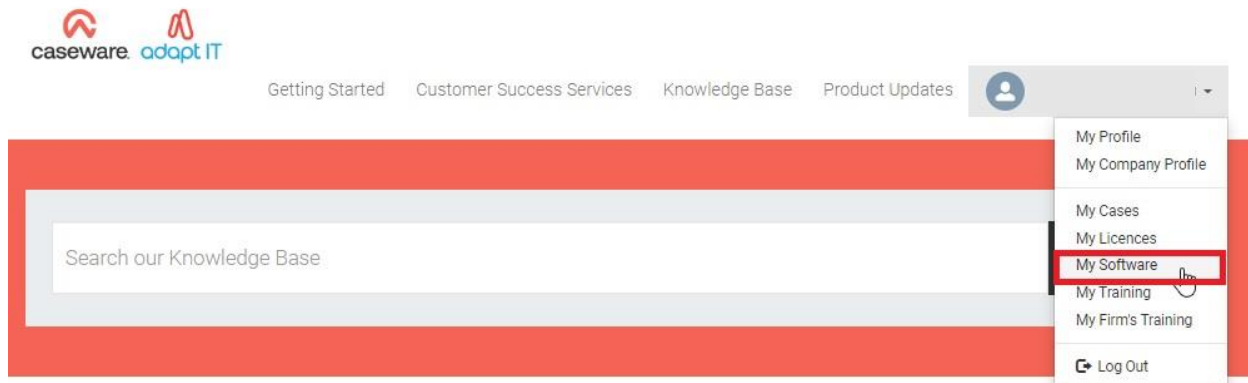
Open the URL: <http://success.casewarefrica.com/> and then click on “login” top right.



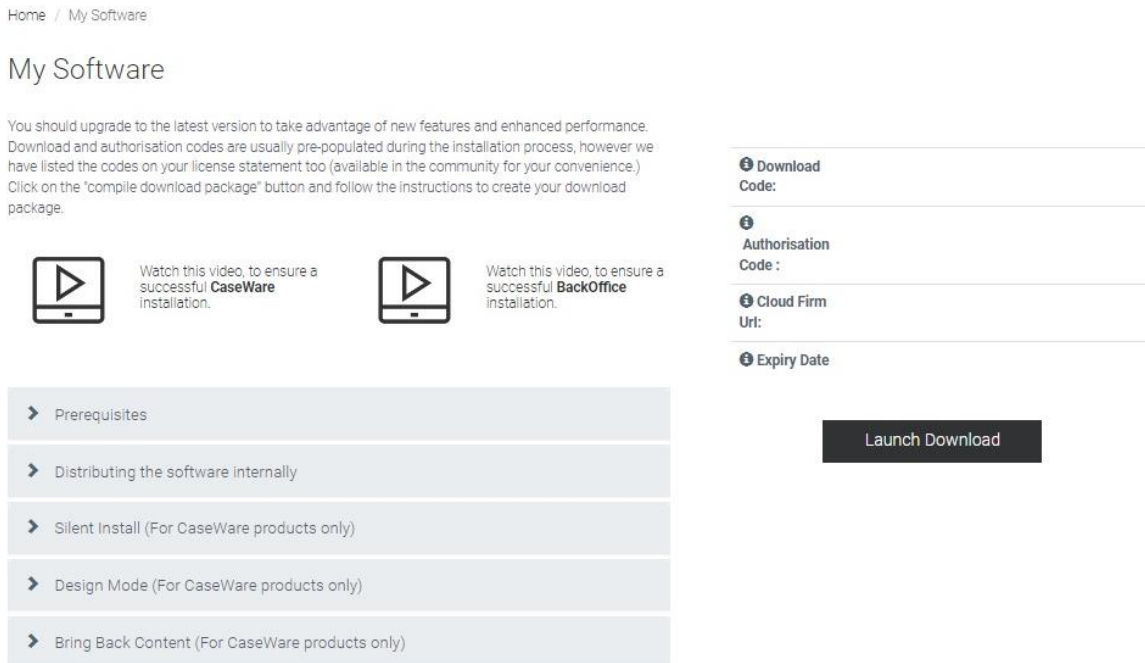
Step 2: Fill in your username and password (If you don’t have an account yet, click on “Register now”. You or your champion would need to log into the community and go to the “My Software” section.



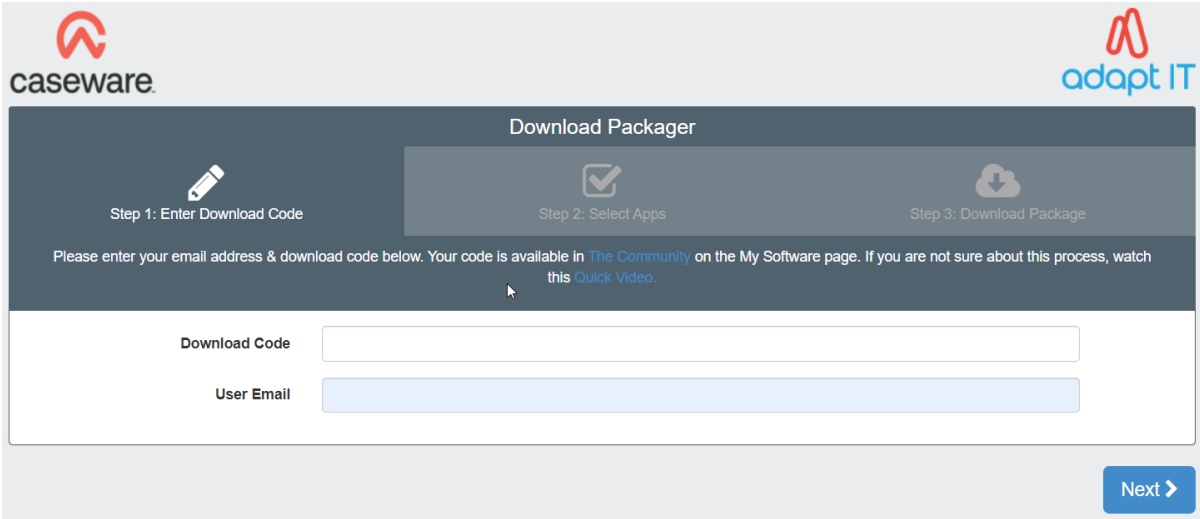
Step 3: Once logged in click on the dropdown menu top-right and select the “My Software” option.



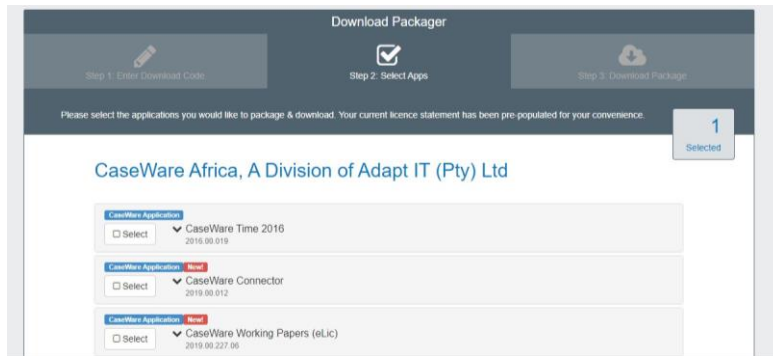
Step 4: This will bring you to the “My Software” page. Here all the information is listed that you will need to install CaseWare Working Papers and the templates your firm uses. Click on the “Launch Download” button to begin the download.



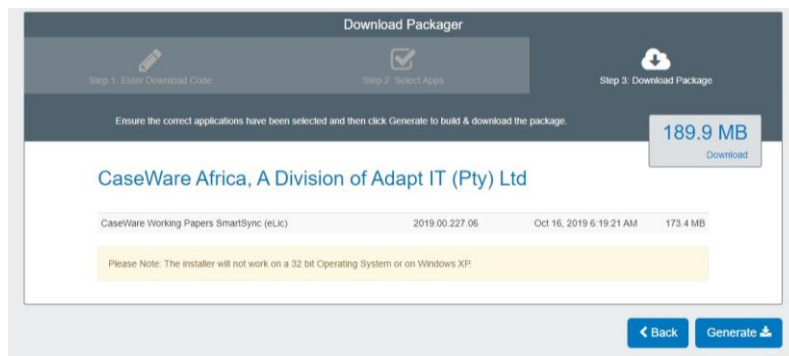
Step 5: This will take you to the Download Packager screen. Type in your own personal email address. Then



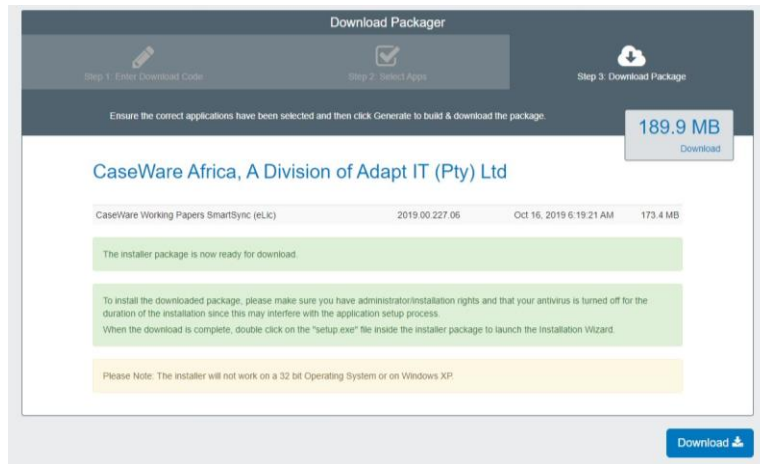
Step 6: Select the CaseWare Working Papers option and the templates that apply to you. Then click on the “next” button.



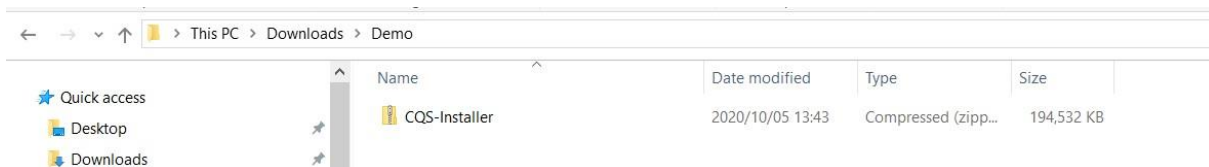
Step 7: You will be able to “Generate” your download package, by clicking on the “Generate button”. Depending on your Internet speed, this might take a while.



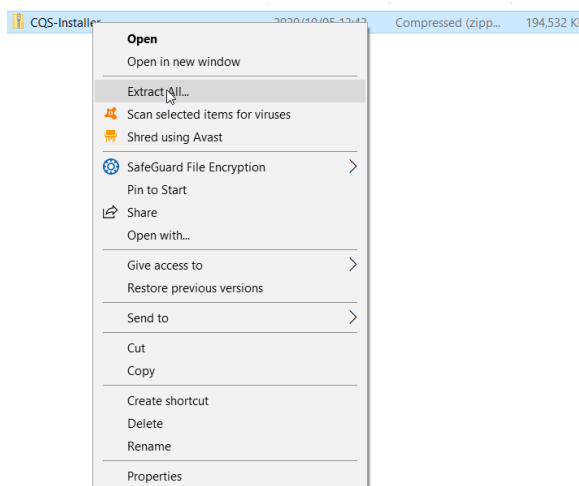
Step 8: Once your package is generated, click on the “Download” button.



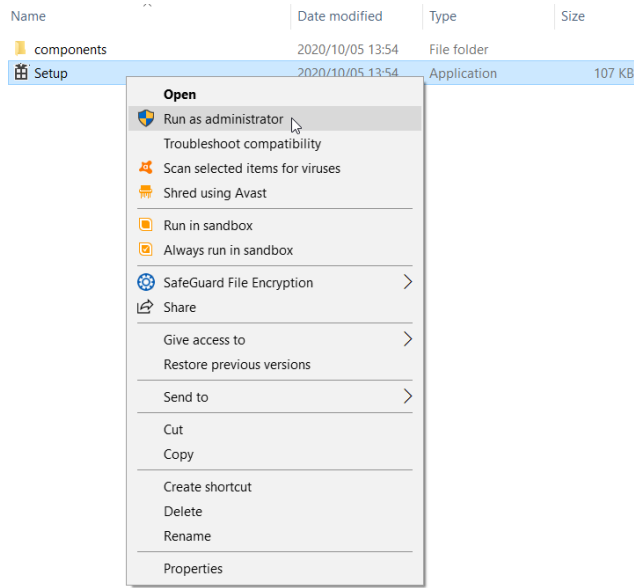
Step 9: Save the CaseWare Working Papers Setup file on your PC, server or network. Should this be for multiple users the location of the file needs to be accessible as this is the place, they will consult to initiate the installation process.



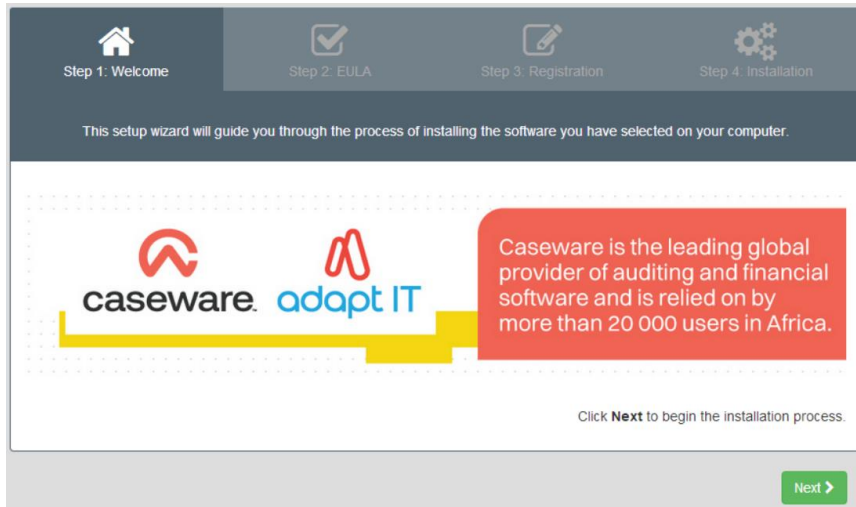
Step 10: Right click on the install packager you just downloaded and extract all the files. This is done by right clicking on the file and selecting the Extract All option.



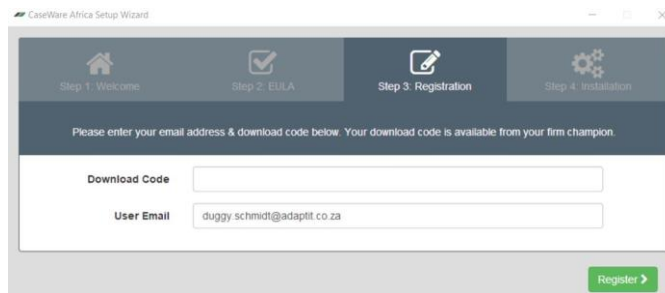
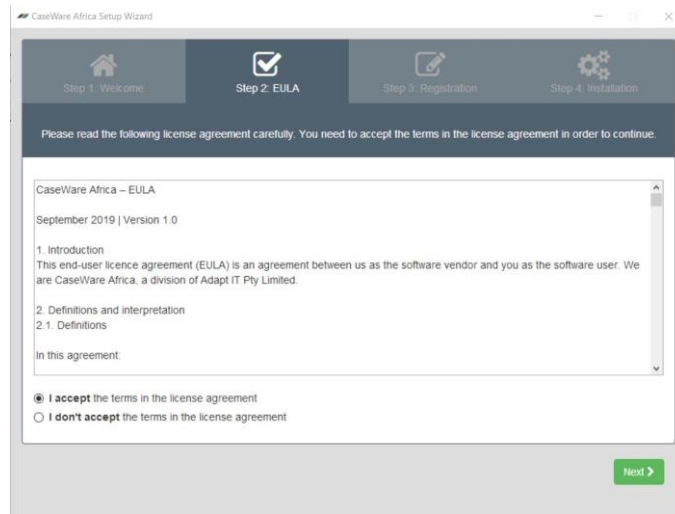
Step 11: Open the unzipped folder and right click on the “Setup” file and select the “Run as administrator” option. This will initiate the “CaseWare Working Papers Setup Wizard”.



Step 12: The welcome screen appears. Click on the “Next” button to proceed.

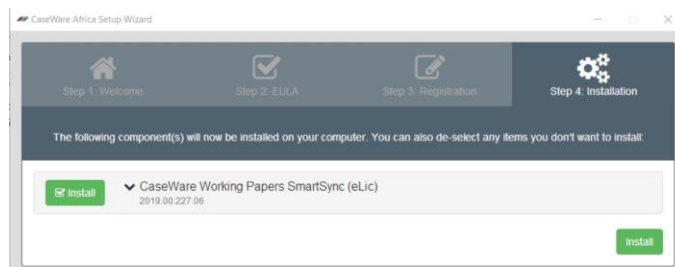


Step 13: Accept the terms and conditions and click on the “Next” button to proceed.

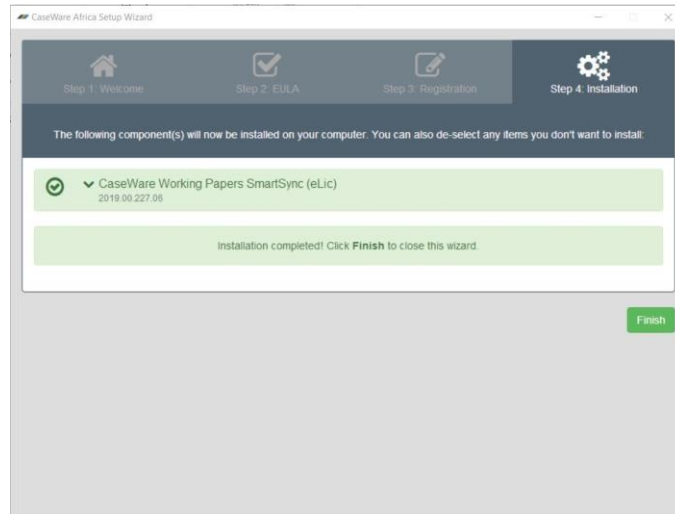


Step 14: The registration dialogue appears. Type in your email address. Notice that the “Register” button only appears once a valid email address is supplied. The download code will filled in automatically.

Step 15: Ensure that all your products and templates are selected. Then click on “Install”.



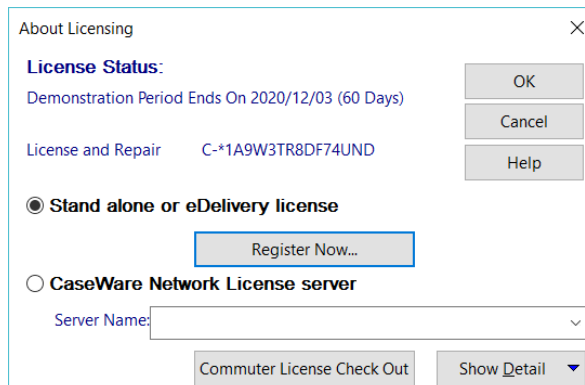
Step 16: Your installation is almost complete. Once the files are installed, you register your software to complete the entire installation process.



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.

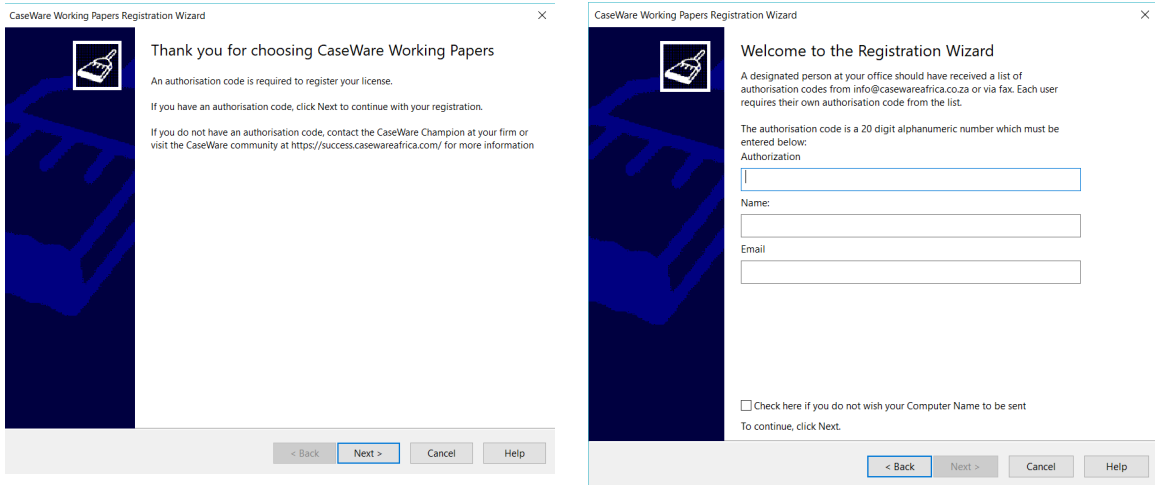


Step 18: The “About Licensing” dialogue box will appear. Select the “Stand Alone Licensing” option and click on “Register now”. This will initiate the “CaseWare Working Papers Registration” Wizard.



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

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.

Contact Us

Main Contact Details

Adapt IT Reception +27 10 494 0000

Help Desk Direct Extension

E-mail CaseWare Support casewareafrika.support@adaptit.com

Other Important Details

Register at casewareafrika.info@adaptit.com for easy access to frequently asked questions, upgrades, downloads and technical documentation.

Email us at info@casewareafrika.co.za regarding:

- Feedback
- Ideas on service or products
- Product information
- Account or license information
- Any other queries

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