CMS Systems Solutions
CaseWare Authorised Distributor

RECOMMENDED PROCEDURE

Defining Logos in the Financial Statements Template

PROCEDURE SUMMARY

1. Logo section in Information Store Document

Open Information Store (Document 01.14) and select Logos section, where logos are defined and matched to each area

a. Open Information Store (Document 01.14). Scroll down to Logos section. If the section is collapsed (indicated by a **+** sign) click on it to expand it.

⊞ **Logos** ← Press + sign to open Logos

Select Logos for each area

Area	OPTION 1			OPTION 2			OPTION 3		
	Show	Greek Logo	English Logo	Show	Greek Logo	English Logo	Show	Greek Logo	English Logo
Cover page Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Cover page Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Auditor's Report Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Auditor's Report Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Tax Confirmation Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Tax Confirmation Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Engagement Letter Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Engagement Letter Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Bank Letter Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Bank Letter Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO

When expanded you can see the Logos settings:

⊟ **Logos**

Define Logos	**Save Logo Properties**	
No.	LOGO Selection	Alignment
1	Can't Show bitmap.bmp	LEFT

Select Logos for each area

| Area	OPTION 1			OPTION 2			OPTION 3		
	Show	Greek Logo	English Logo	Show	Greek Logo	English Logo	Show	Greek Logo	English Logo
Cover page Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Cover page Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Auditor's Report Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Auditor's Report Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Tax Confirmation Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Tax Confirmation Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Engagement Letter Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Engagement Letter Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Bank Letter Header	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO
Bank Letter Footer	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO	☐	NO LOGO	NO LOGO

2. Defining Logo properties.

In the Define Logos section you can define each logo's properties such as location, size, alignment etc.

a. In *"Define Logos"* double click the logo box to open the **Picture Object** window.
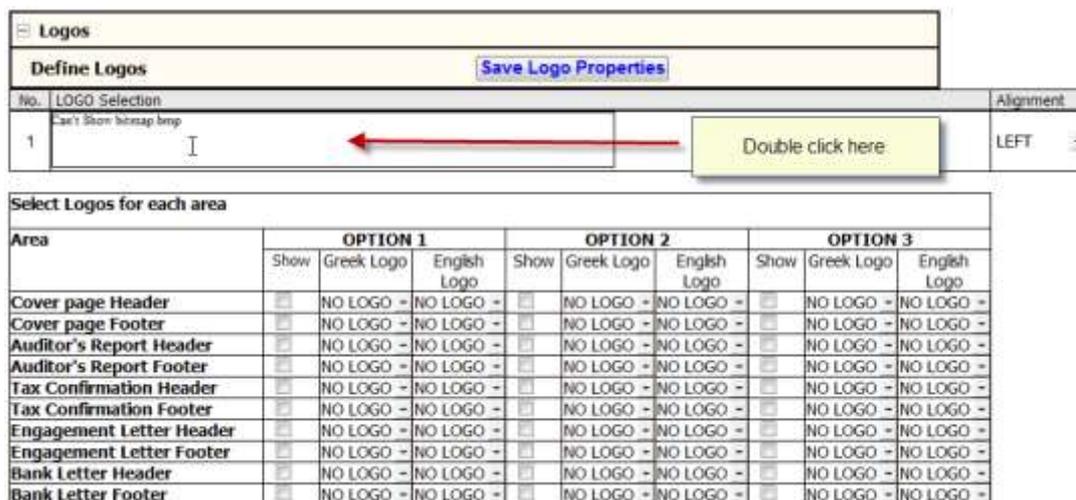
b. In the *"Picture Object"* window click **Browse** to select your logo.
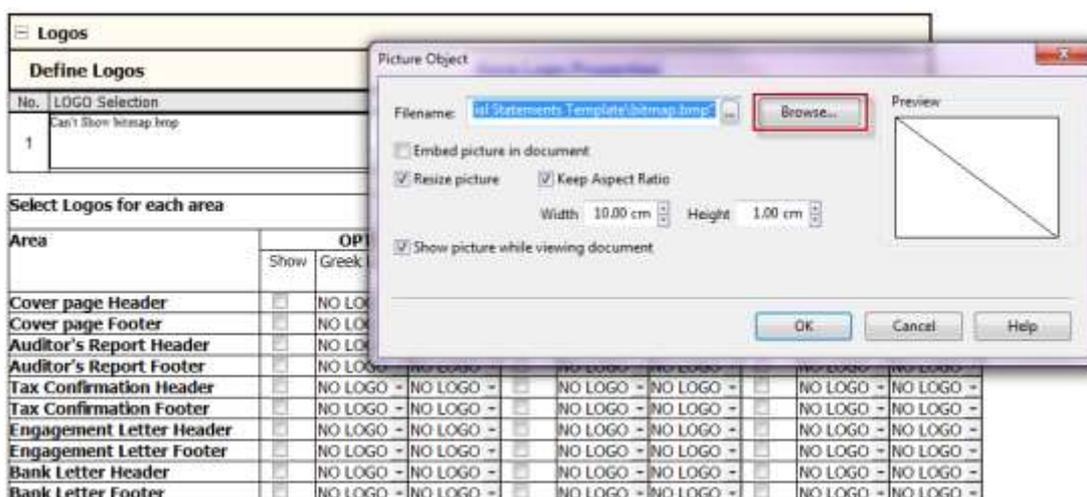
Here you have the following options:

Embed picture in document: Select this option to enable the picture to become part of the CaseView document. By embedding the logo this is always displayed, irrespective of whether the original logo location is available or not.
The alternative is to browse for the logo and select it as a dynamic link. If the picture is not embedded, then if the selected logo is in a folder that is no longer available this is no displayed.

Resize picture: To enlarge or reduce the original size of the picture, click Resize picture. In the Width and Height boxes, type or select the size of the picture. Clear the check box if you want to restore the picture to its original size

Keep Aspect Ratio: When selected, the graphic returns to its original size. Once activated, the ratio of the picture is fixed, meaning that the height changes accordingly when the width changes.

Width: Type or select the width of the picture in the Width box.

Height: Type or select the height of the picture in the Height box
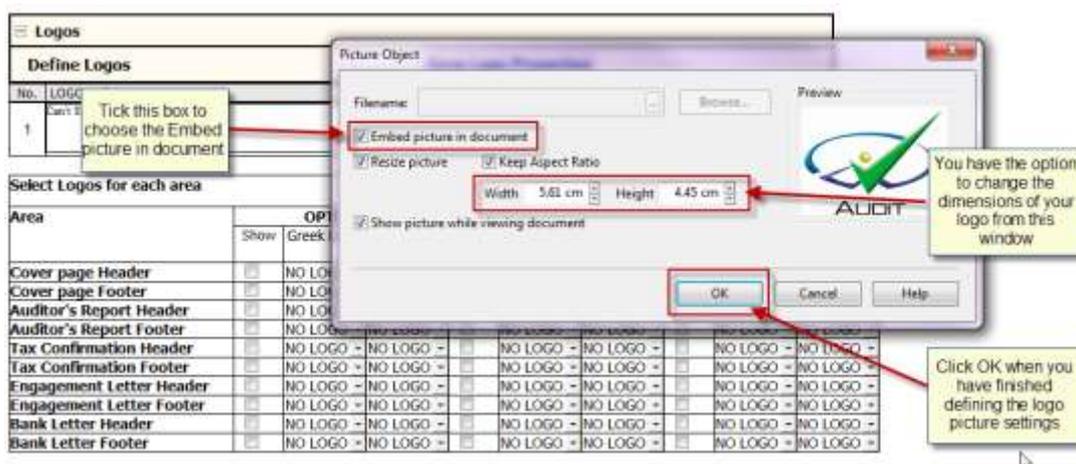
When you have finished defining the picture object settings, click OK to save them.

c. Choose how to align the logo using the **Alignment** options in the left column.
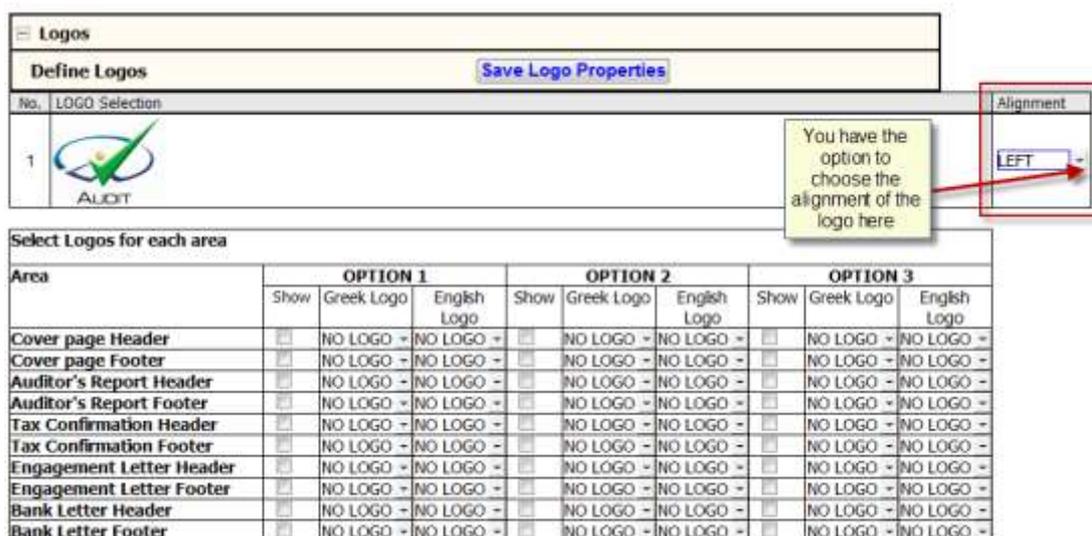
3. **Inserting additional logos**

   You can insert as many logos as required in the Define Logos sections by using the right click menu

   a. If you require more than one logo in your documents you can add lines in **Logo Section** by right clicking on the number and choosing **Insert Row.**

   You can define an unlimited number of logos for use in your client file.

   The right click menu allows you to insert, delete or sort, selected logos.

b. The same logo is copied in the newly inserted line. Follow the same procedure as defined above to define the Logo properties i.e. select the new logo picture, size, position etc.

4. Save Logo Properties

All defined logo properties are saved to the CaseView Database for use in all CaseView documents within the CaseWare file.

a. When you finish defining your logos, click on **Save Logo Properties** to save your settings. This process saves all defined logo properties to the database so that these can be used in other documents.

5. Select Logos for each area of the CaseWare client file

After logos are defined and saved, you can select which logo is to be used for each Header and Footer for all documents that can have logos.

a. Logos can be displayed in the Header and Footer of each of the following areas:

- Cover Page
- Auditor's report
- Tax confirmation
- Engagement Letter
- Bank Letter

b. In the table under **Select Logos for each area** check the box under **Show** to select the documents you want the logo to appear in, either as a Header or Footer.

c. If you selected to show a logo in a specific area, select which logo you want to display from the dropdown list. You can select a different logo for each area (Header or Footer) and for Greek or English.
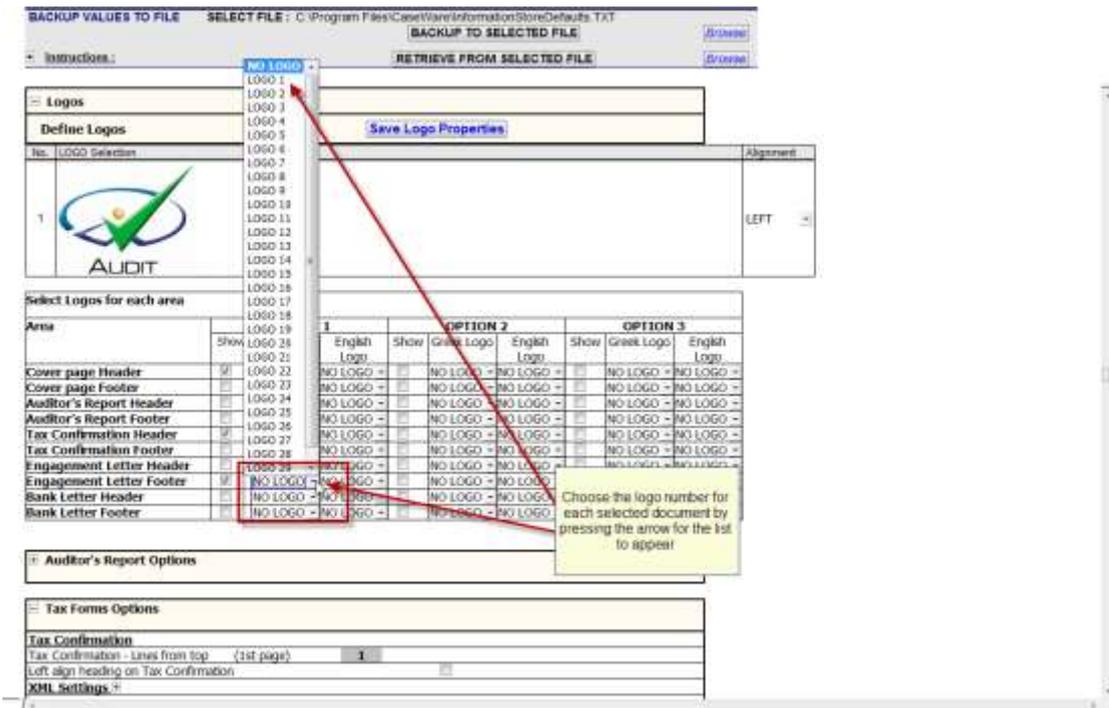
NOTE: *Options 1, 2 and 3 refer to the three different auditors you can have, detailed at the beginning of the Information Store.*

6. Updating Headers and Footers

If the Financial Statements document is from an older version where the Headers and Footers were not correctly defined, use the option to update Header and Footers.

a. If the version of the Information Store is newer than the version of the Financial Statements, then you should also update the Headers of the Financial Statements, under Updates to Documents, as seen below:

This finishes the procedure to add Logos in your Documents.

The logos should now be shown as in the **example** below: