CMS SYSTEMS SOLUTIONS
CaseWare Authorised Distributor

RECOMMENDED PROCEDURE

Updating CaseWare Tax Forms Template to latest Working Papers Version
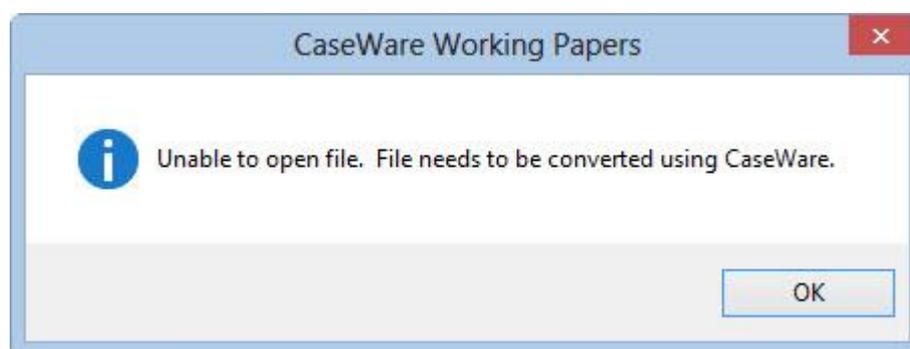
VERSION 4.00

PROCEDURE SUMMARY

1. **Identifying requirement to convert CaseWare Tax Forms template**

   a. Open CaseWare Tax Forms from the icon on your desktop

   b. The first time you open CaseWare Tax Forms after installing the latest CaseWare Working Papers, you will get the following message.

   c. To be able to use CaseWare Tax Forms it is therefore required that you convert CaseWare Tax Form files to the latest CaseWare Working Papers version.

      If you have multiple CaseWare Tax Forms users, you will need to convert each individual Tax Forms Local installation as well as the Central Database, which of course only has to be converted once.

   d. The procedure for the conversion of the Tax Forms files is defined below.

CONVERTING CASEWARE TAX FORMS LOCAL DATABASES

2. Procedure to convert workstations with CaseWare Tax Forms installed.

    a. Launch CaseWare Working Papers.

   **b.** In *File Open* window, select Computer and click Browse to Open Existing File window
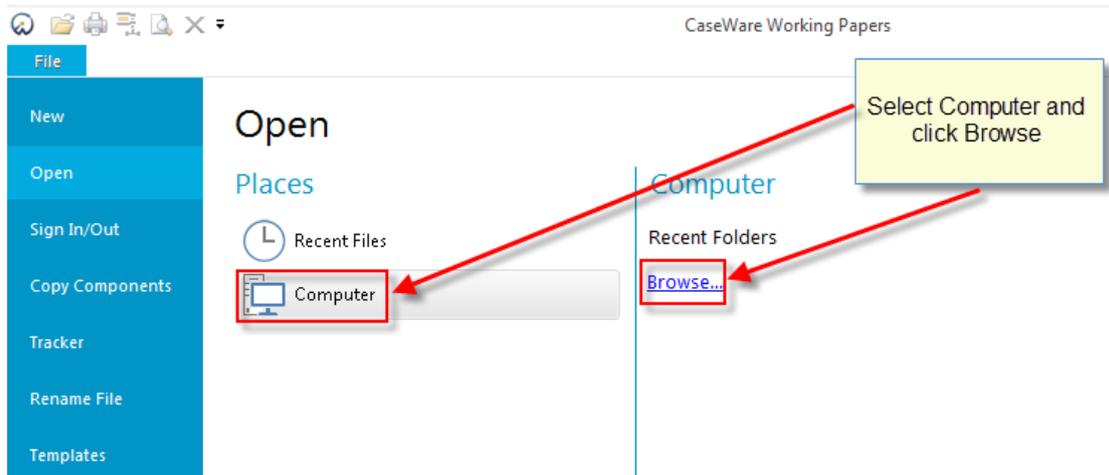
    c. In *Open Existing File* dialogue browse to find the Local Tax Forms folder.
This is usually located in the C:\ Program Files or Program files (x86)\ CaseWare\ Data\Tax Forms.
Select the Tax Forms file to open it.
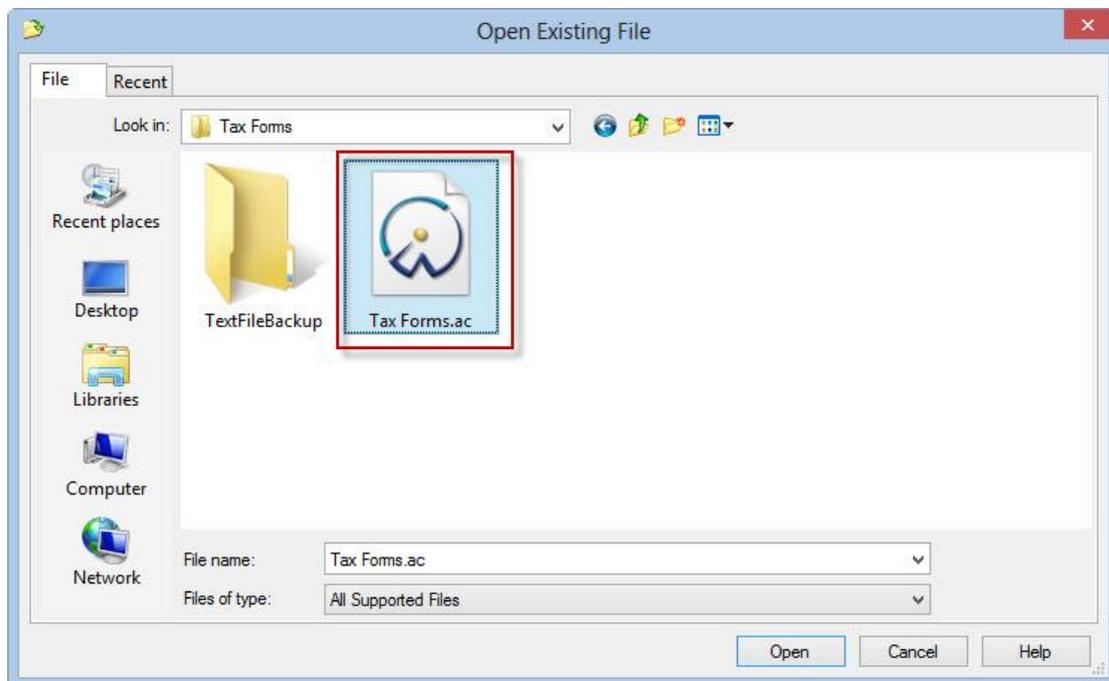
d. This is a previous version CaseWare Working Papers file being opened in CaseWare Working Papers latest version, therefore you will be asked to convert it.

NOTE : It is recommended that you select the option "Make Backup Copy in:" and browse for the folder you would like to backup the file. This will ensure that a backup copy of the file prior to conversion is made.
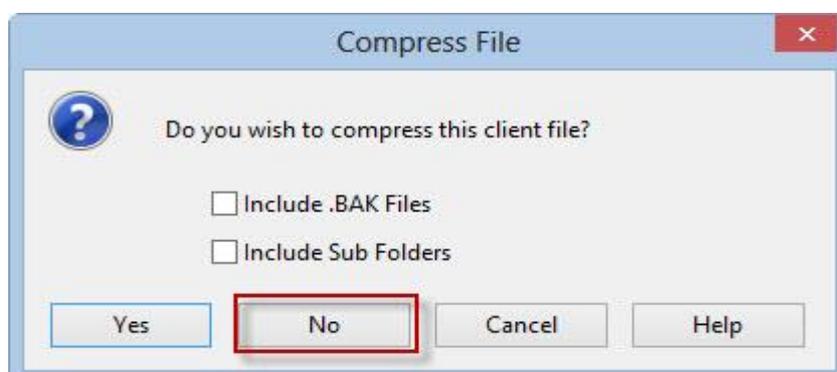
Click ok to convert the file.
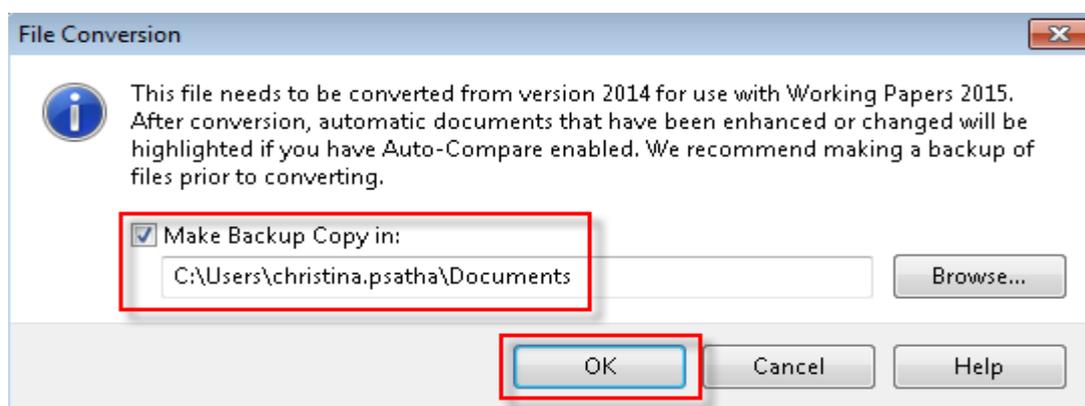
e. When the conversion and backup processes have completed, the file opens which means the conversion has completed successfully.
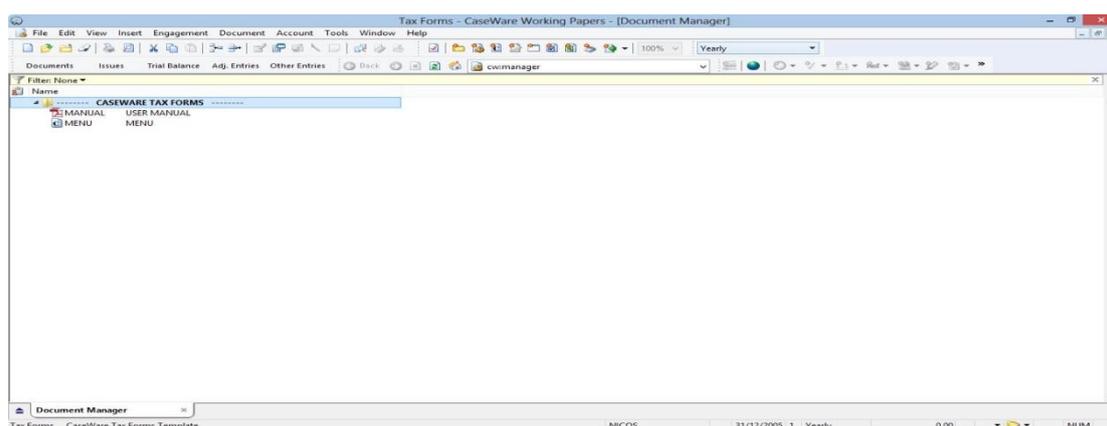
f. Close the file without compressing it.
NOTE : To ensure this is not compressed on close if the *Compress File* dialogue appears, select No.

3. Repeat the process in step 2 for all workstations that have CaseWare Tax Forms installed.

CONVERTING CASEWARE TAX FORMS CENTRAL DATABASE

4. Procedure to convert CaseWare Tax Forms Central Database file.

    a. Identifying requirement to convert CaseWare Tax Forms Central Database

If you open CaseWare Tax Forms from a client workstation that has been converted to latest CaseWare Working Papers whilst the Central Database has not yet been converted, you will see the following warning in the Tax Forms MAIN MENU


In any CaseWare Tax Forms installation there is only one Central database, which is shared by all Tax Forms users.

Unlike local installations which all have to be converted individually, the Central database only requires to be converted once for all users

    b. In the *File Open* … window, select Computer and click Browse to Open Existing File window.
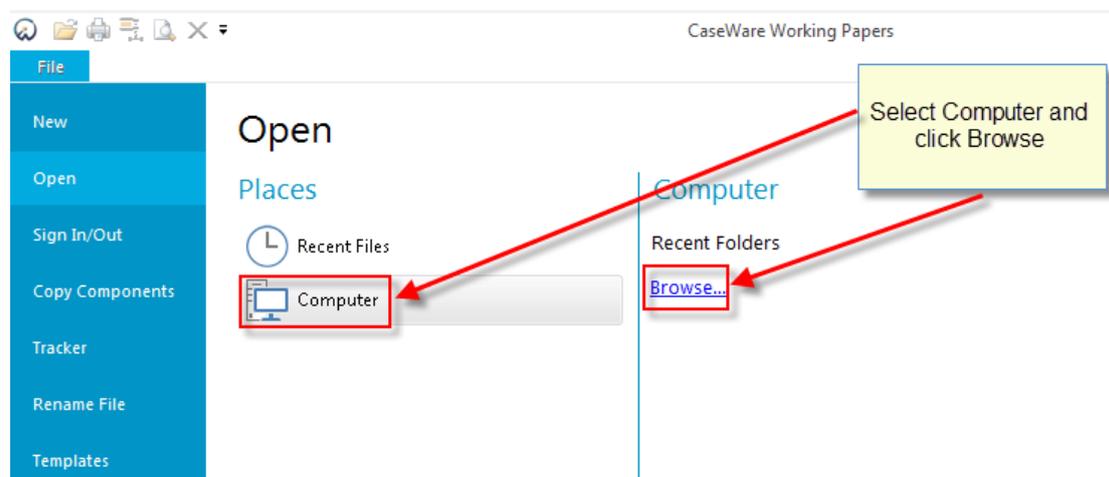
c. In the **Open Existing File** dialogue browse to find the CaseWare Tax Forms Central Database and select the file Tax Forms Central file to open it.
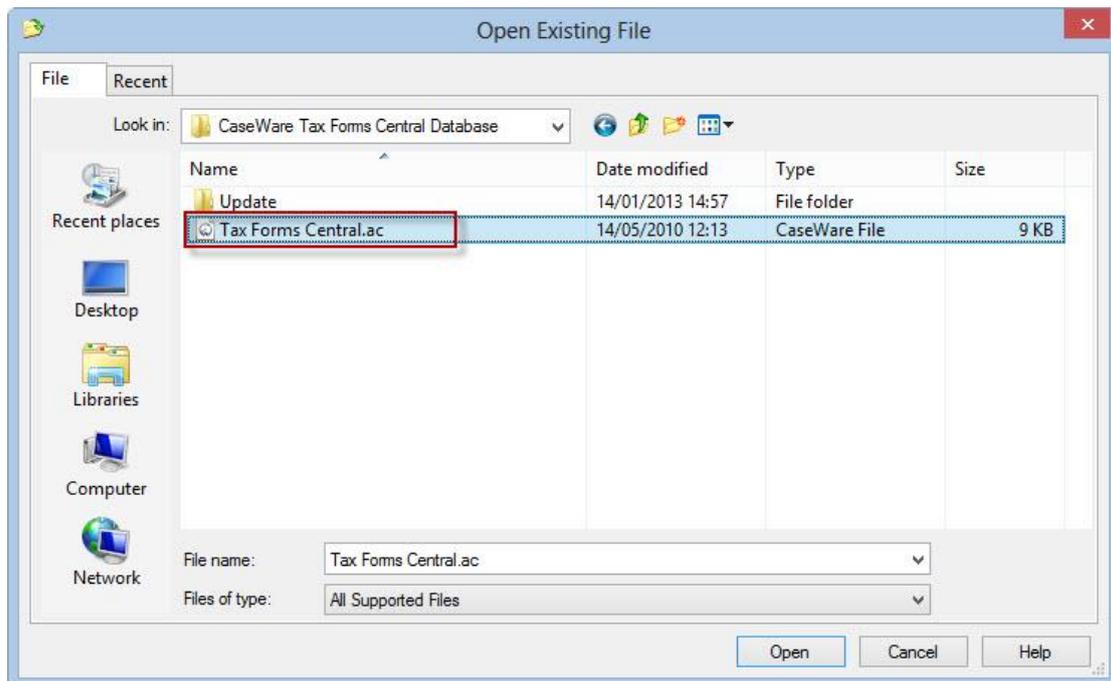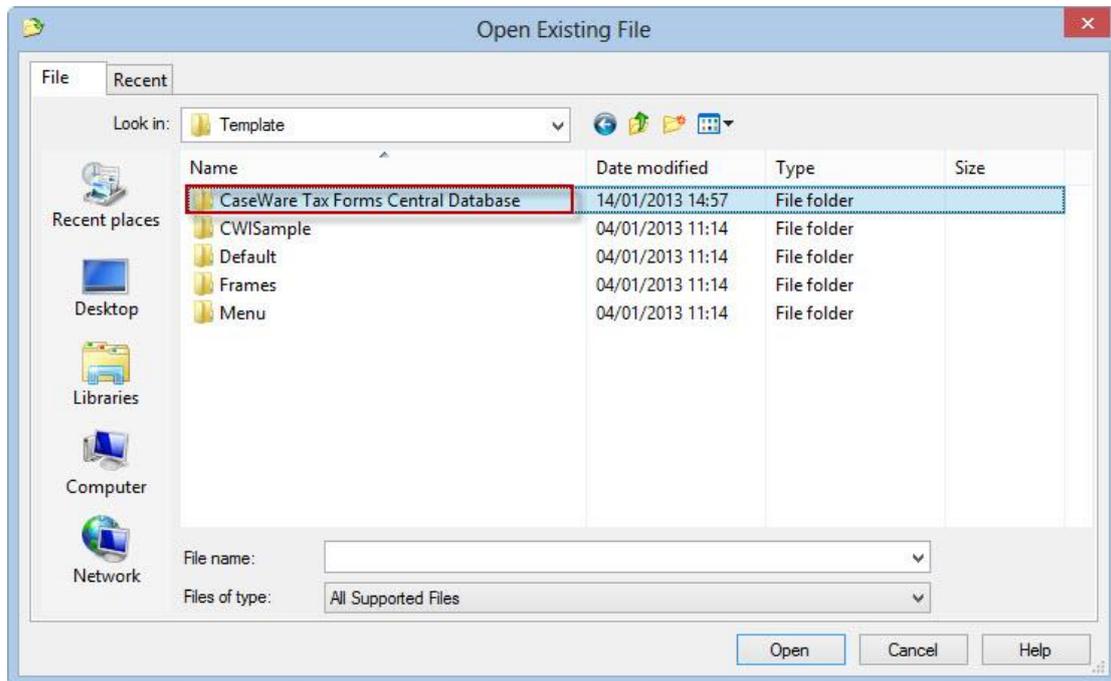
d. This is a previous version of CaseWare Working Papers file being opened in CaseWare Working Papers latest version, therefore you will be asked to convert it.

NOTE : It is recommended that you select the option "Make Backup Copy in:" and browse for the folder you would like to backup the file. This will ensure that a backup copy of the file prior to conversion is made.

Click ok to convert the file.
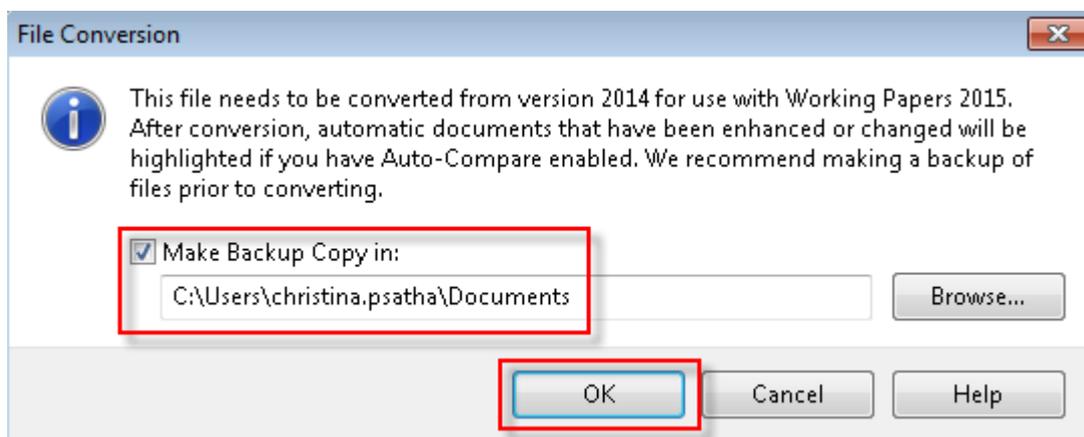
e. When the conversion and backup processes have completed, the file opens which means the conversion has completed successfully. As this is protected, you will be asked to Log In.
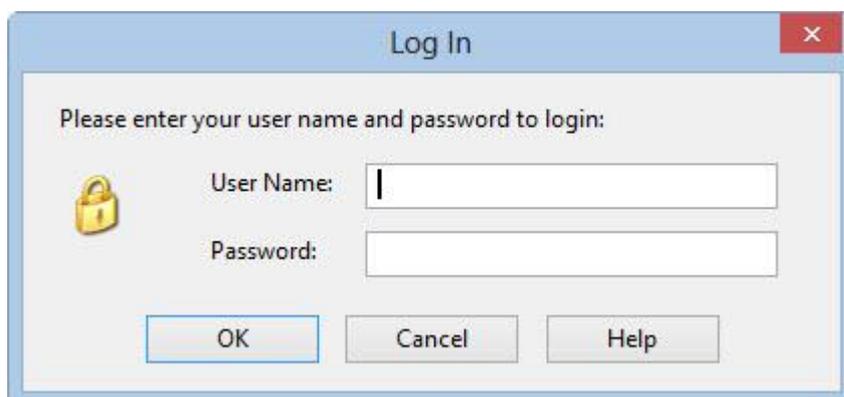
f. It is not necessary to log in, so just click Cancel to proceed.

g. Close the file without compressing it.
NOTE : To ensure this is not compressed on close if the **Compress File** dialogue appears, select No.

The process is now complete and CaseWare Tax Forms can be used in latest CaseWare Working Papers.