



CMS SYSTEMS SOLUTIONS
CASEWARE AUTHORISED DISTRIBUTOR

RECOMMENDED PROCEDURE



Updating Audit International Template (FOR FIRM AUTHOR ONLY)

VERSION 2.00

PROCEDURE SUMMARY

1. **Download the correct file from CMS Systems Solutions web site. Decision is to be made by the Firm Author only. 3**
2. **Backup the Template before applying any of the options above..... 6**
3. **If you have chosen to use the Update patch (Option 1, Step 1), run the update patch on the Firm Author's computer. Process will take several minutes. 8**
4. **After the update is complete re-open the template and ensure all firm customisations are still included in the Template. 10**
5. **After the Firm Author verifies that all customisations are included, the updated template needs to be repackaged and distributed to all other users in the firm.. 11**
6. **Distribute output file to all users. The template should be installed on all remaining computers using Audit International Template. Do not re-install on Firm-author's computer. 12**

1. Download the correct file from CMS Systems Solutions web site. Decision is to be made by the Firm Author only.

Go to Client Support Area on www.cms-ss.com. Carefully read the instructions listed and make sure you download the correct file. Please consult the Firm Author at the office before you apply your choice.

NOTE: You will only need one of the two options.

- **First option:**

If the Firm Author has performed any customisations that they wish to keep, please contact us to get the latest Update Patch file, named "**AIT Update patch - CY 16.00294A**". This will allow you update the Master Template and at the same time keep any firm customisations.

Template customisations that will require the update patch to be downloaded may include:

- Firm Risks and Controls Library in Template
- Creation of Firm's own Engagement Profiles (additional to the default six profiles)
- Additions of procedures in Work Programs
- Changes in Document Tags in Master Template.
- Any kind of changes in the Audit Documents
- Creation of own Risk Tables, Audit Programs, Control Matrixes based on Master Documents
- Changes in General Settings
- Any combination of the above

- **Second option:**

If the Firm Author has not performed any of the customisations mentioned above, please select the Template file, named "**Audit International - CY v2014.09.05**". This will allow you install the latest version of the Audit Template.

NOTE: ANY CUSTOMISATIONS WILL BE OVERWRITTEN UNDER THIS OPTION. MAKE SURE YOU CONSULT WITH THE FIRM AUTHOR BEFORE INSTALLING THIS FILE!

To download the correct files:

- a. Enter CMS Systems solutions web page, at www.cms-ss.com



- b. Login to the page, using your email address and the password. Then click **“Log In”**



- c. Once logged into the support area, select **CaseWare Audit International**

Product	Latest Version	Date Updated
CaseWare Working Papers	2014.00.106	18/11/2014 09:10
CaseWare Financial Statements	V2014.09.02	20/10/2014 11:18
CaseWare Audit International	v16.00 - 2014.09.06	18/11/2014 09:00
Capital Statements <i>New!</i>	V2013.06.01	10/02/2014 15:08
Tax Forms <i>New!</i>	V20150119002	19/01/2014 13:00
Connector <i>New!</i>	v2014.00.035	23/10/2014 11:43

- d. In the following screen, click on the highlighted line to download the required file, based on the instructions in **Step 1**

> Audit International Downloads

Version: v16.00 - 2014.09.06





CaseWare Audit International version 16.00 is now available for download.

PLEASE READ the important instructions included in each download before you proceed with the installation!

Always consult with the Firm Author before proceeding with any installation.

You may contact us by telephone at **22817503** or email us at support@cms-ss.com if you require any assistance.

Columns:

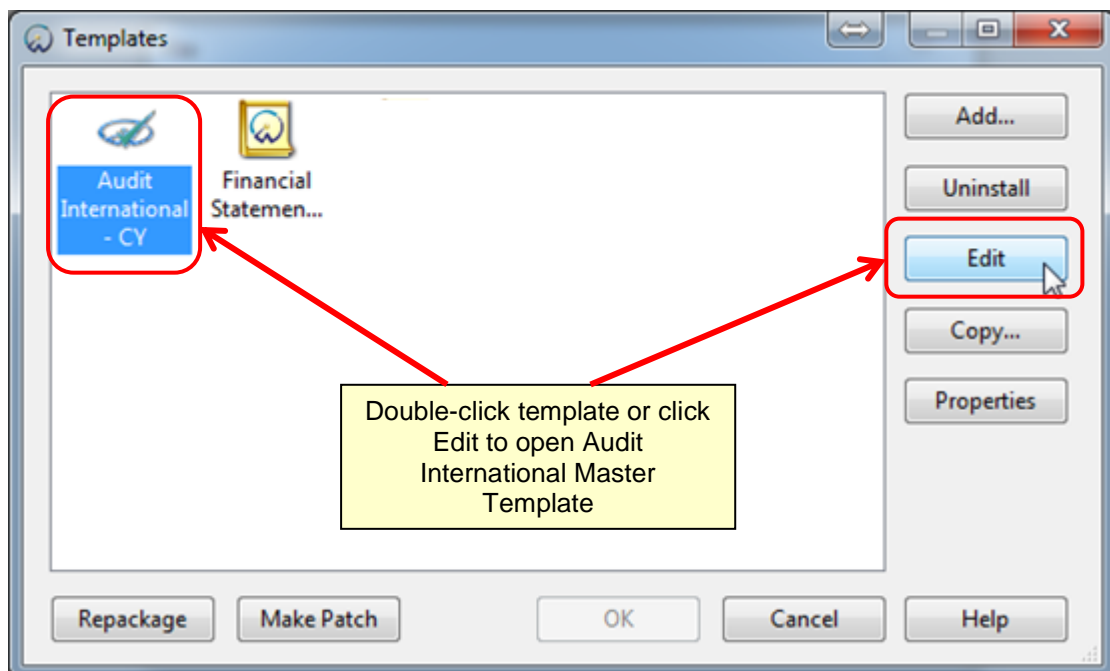
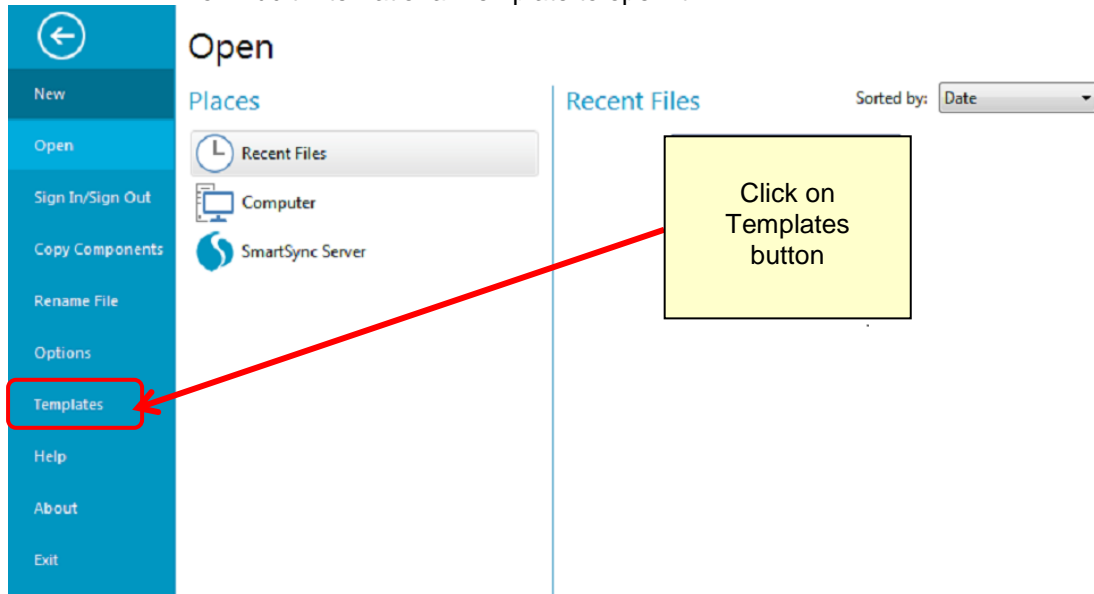
#	Title	Version	Description
CaseWare Audit International Files			
	Audit International - CY v2014.09.06	v2014.09.06	Audit International - CY v2014.09.06
	CAIT patch 1- cannot update client files to v16.00 - 20141114		Use this patch if you have a problem updating a client file to version 16.00. Please read instructions inside before installation.
	CAIT patch 2 - Dashboard missing from client files 20141114		Use this patch if new client files have been disabled. Please read instructions inside before installation.
	Audit 16.00 - What's new		Audit 16.00 - What's new

Download the Template by clicking on the first line

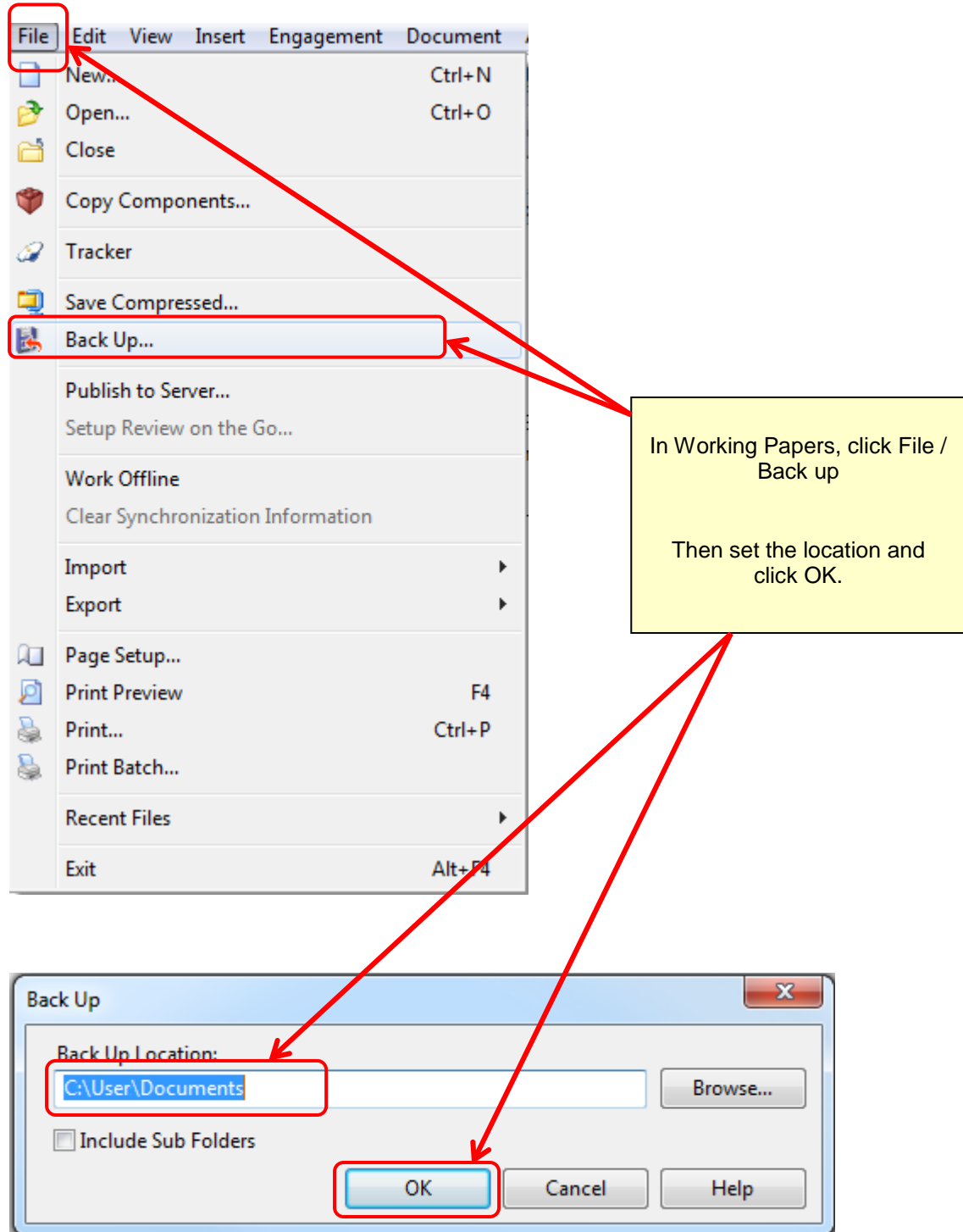
Download the PDF document containing the most recent changes in the Template

2. Backup the Template before applying any of the options above.

- a. Open Caseware Working Papers and click on Templates. Then double-click on Audit International Template to open it.

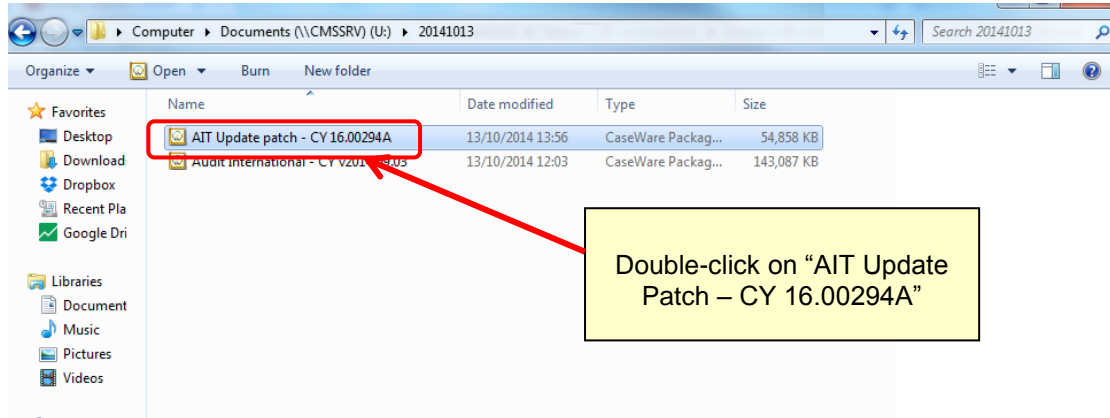


b. Create backup of Template. Click on File / Back up.

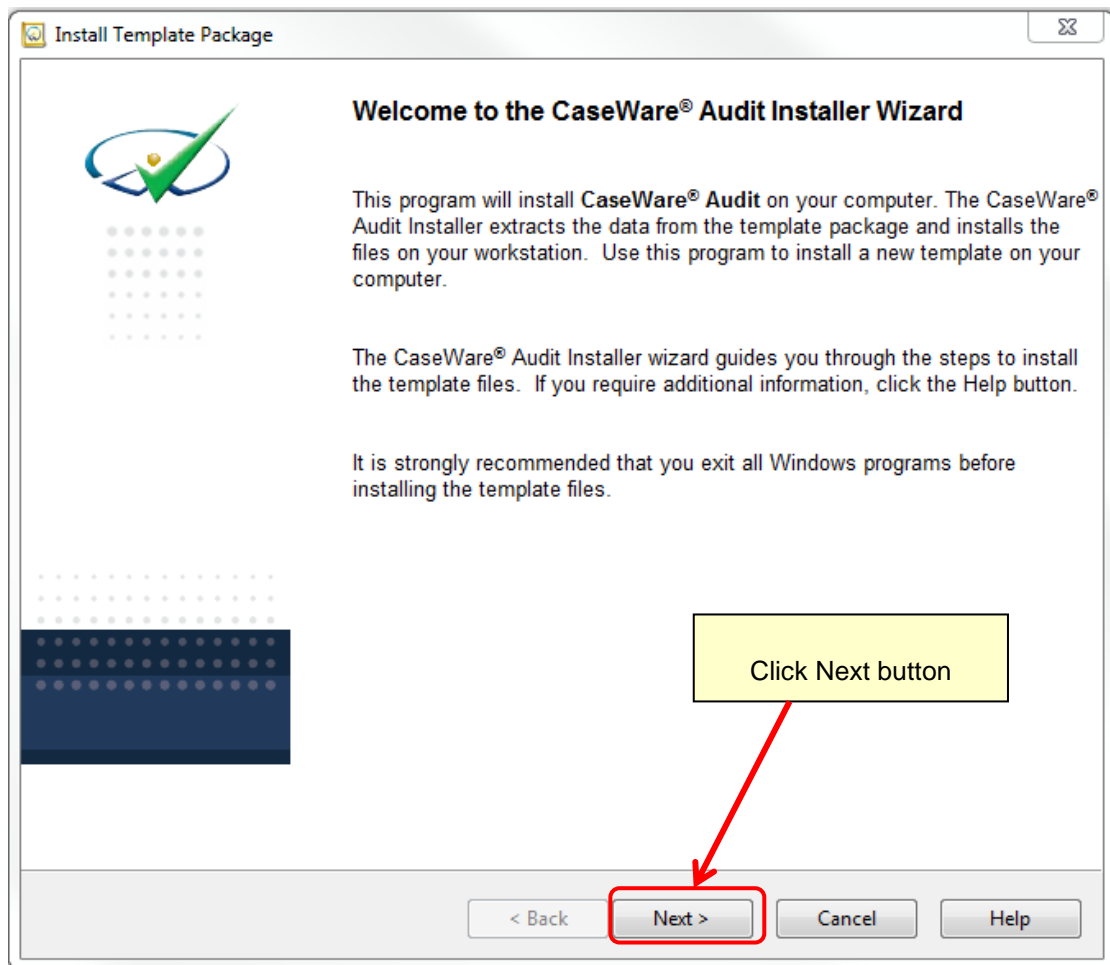


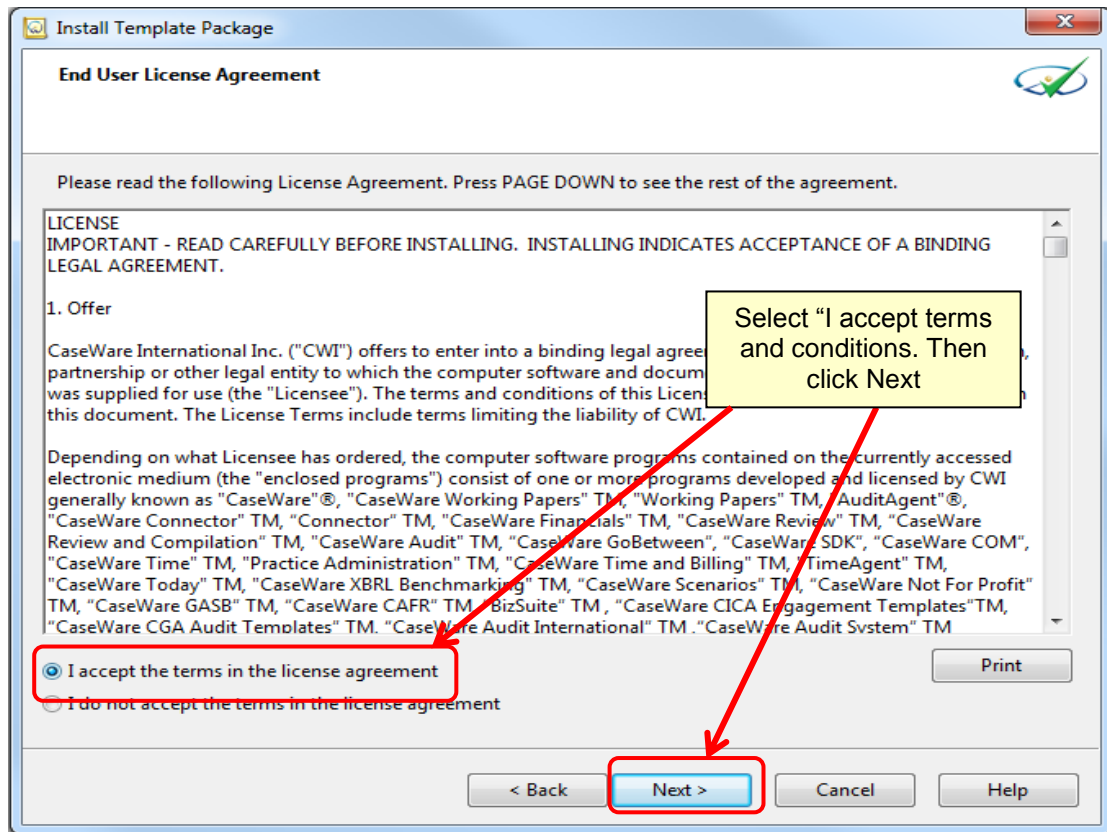
3. If you have chosen to use the Update patch (Option 1, Step 1), run the update patch on the Firm Author’s computer. Process will take several minutes.

a. Find the downloaded patch

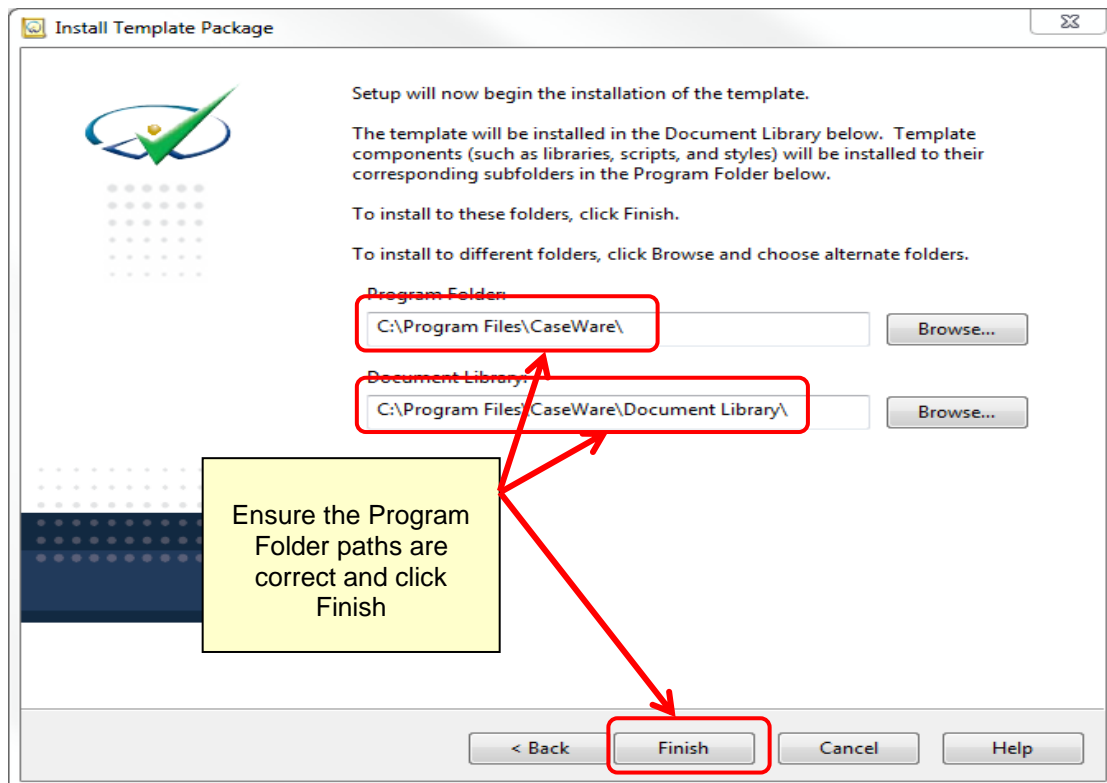


b. In the window that appears, follow the instructions.

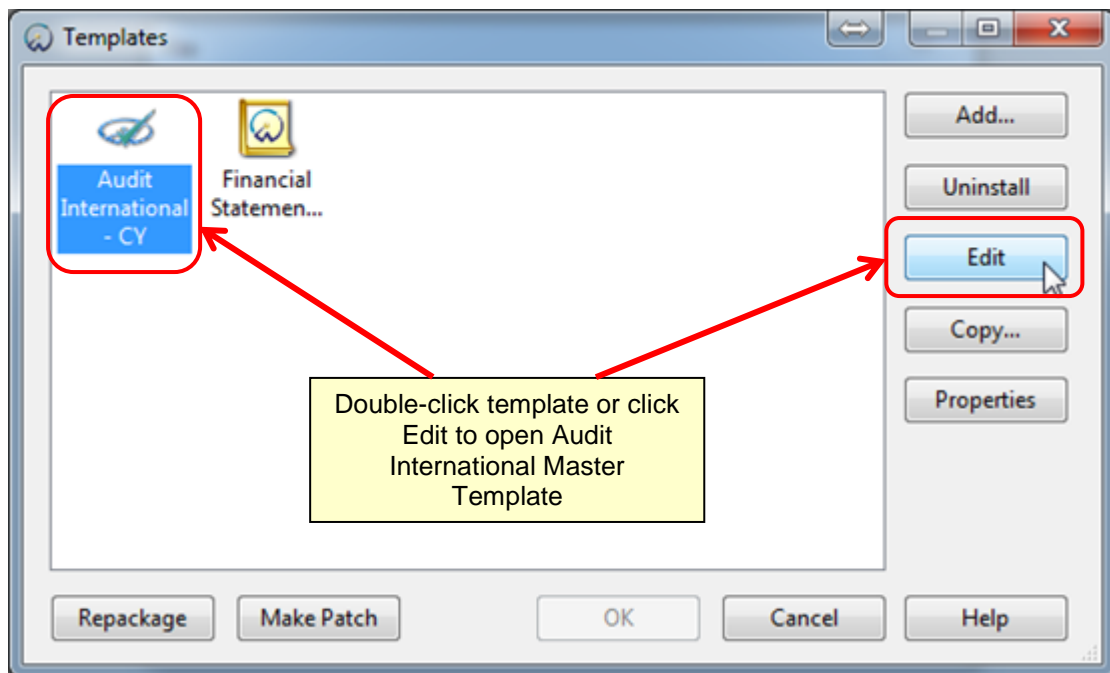
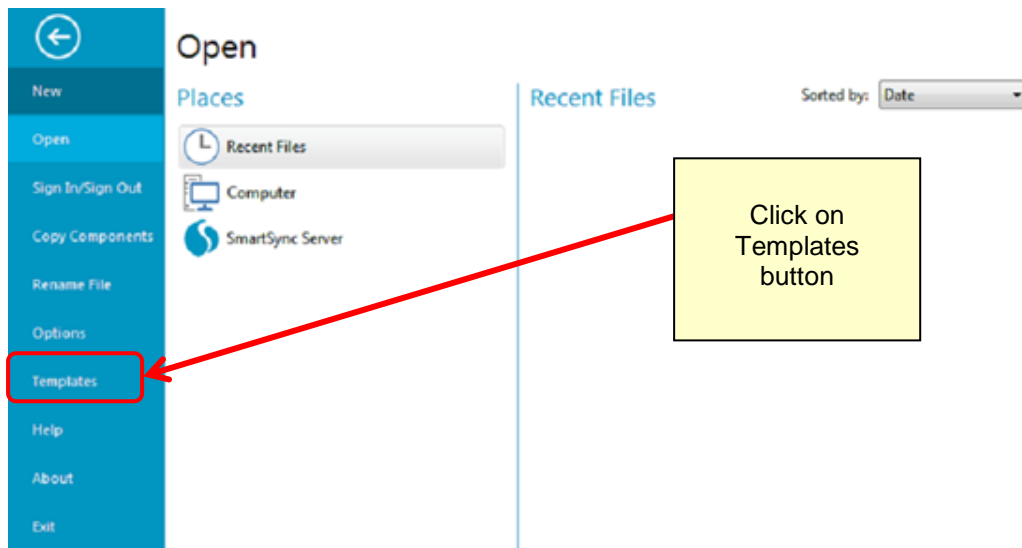




Ensure the Program Folder paths are the correct ones and click Finish. This will take several minutes to complete.



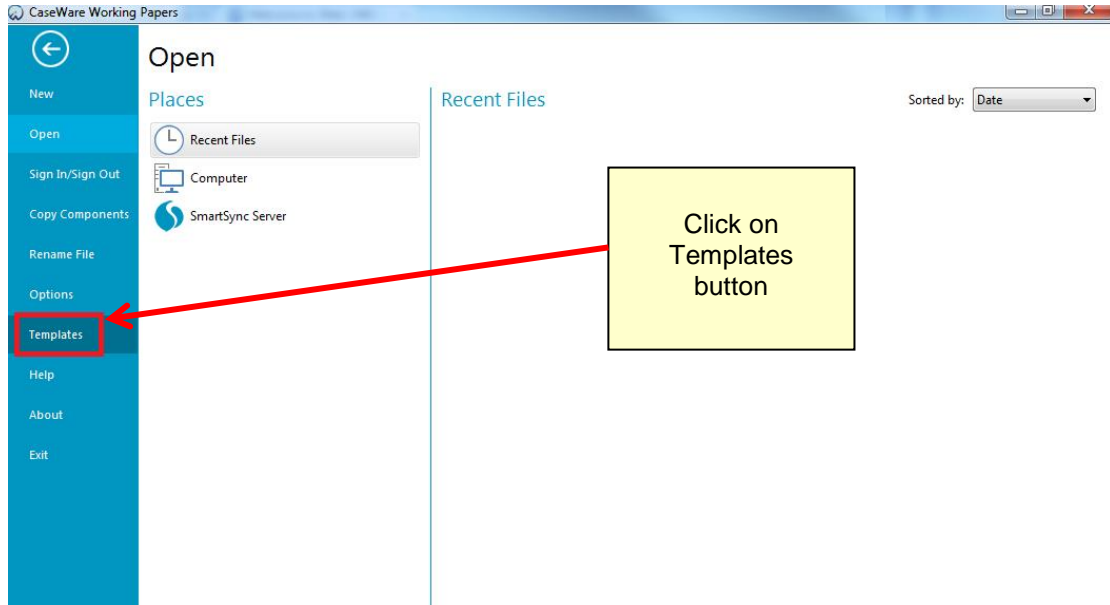
4. After the update is complete re-open the template and ensure all firm customisations are still included in the Template.



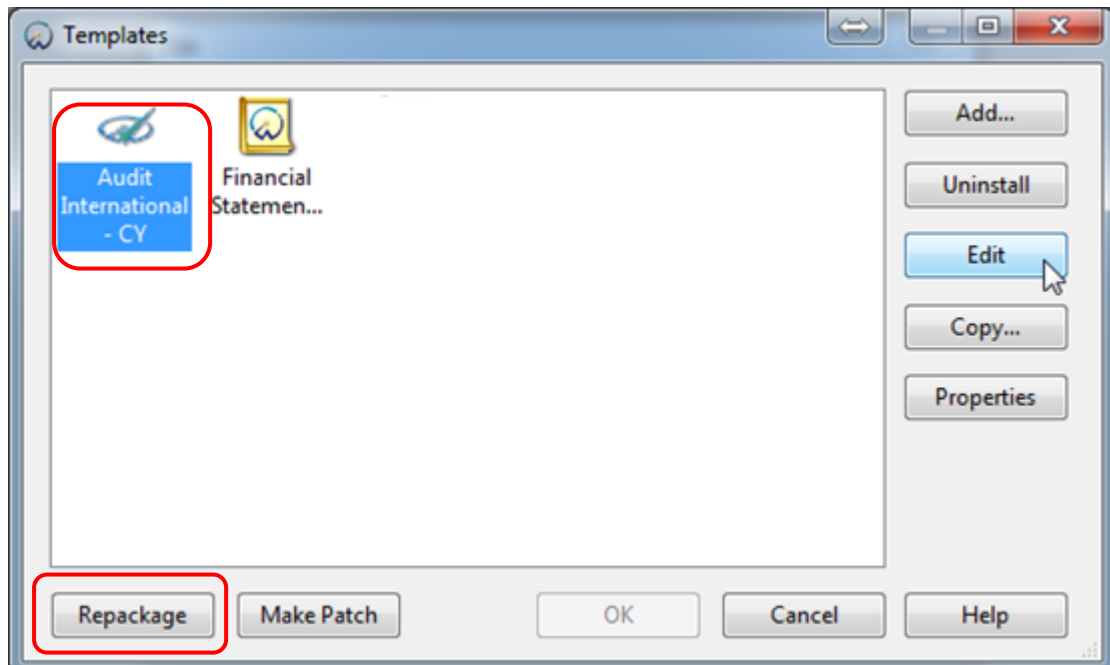
Go through the Template and ensure all customisations performed by the firm are intact.

5. After the Firm Author verifies that all customisations are included, the updated template needs to be repackaged and distributed to all other users in the firm.

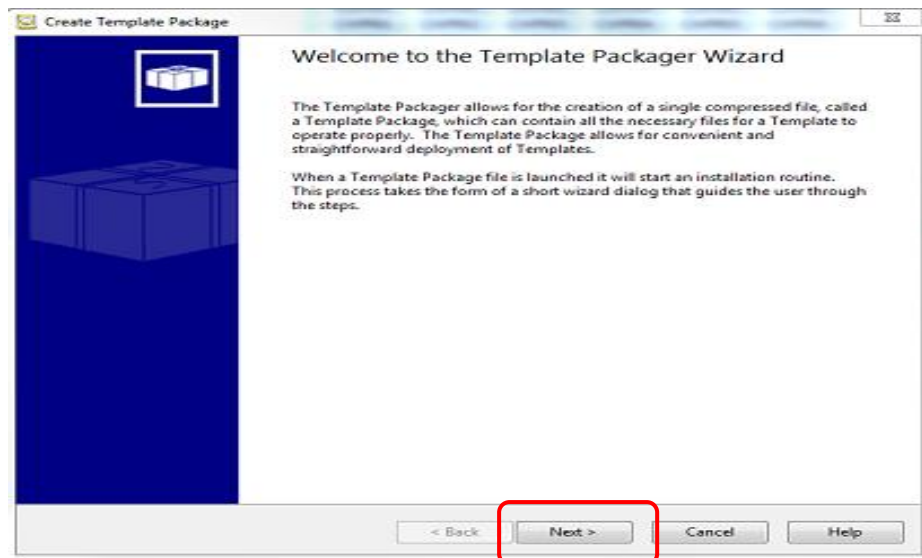
- a. Open CaseWare Working Papers and click on **Tools** and select the **Templates** option:



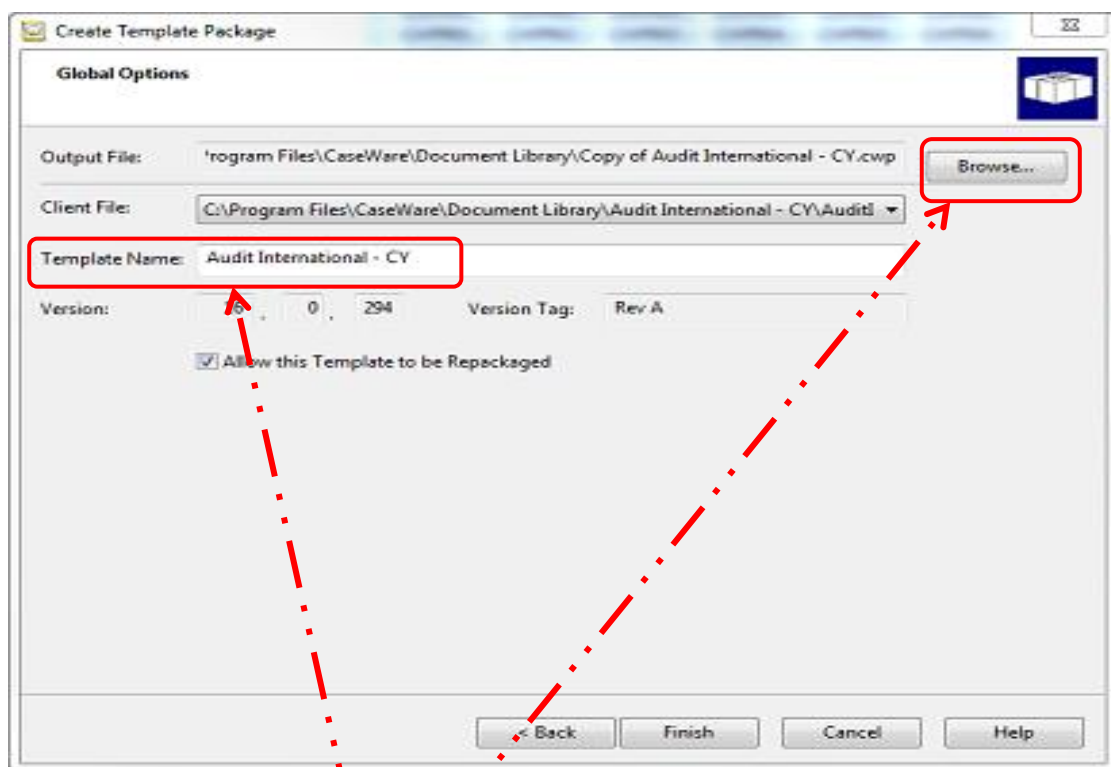
Click once on Audit International template and then click Repackage



Click Next and proceed to the next step



- b. You may change the location and name of the output file by clicking on Browse



IMPORTANT NOTE: Changing the Template name is NOT allowed. Change the Output File name instead if you have to.

Click Finish to have your updated template repackaged.

6. Distribute output file to all users. The template should be installed on all remaining computers using Audit International Template. **Do not re-install on Firm-author's computer.**