



**CMS SYSTEMS SOLUTIONS**  
CASEWARE AUTHORISED DISTRIBUTOR

# Setup Procedure

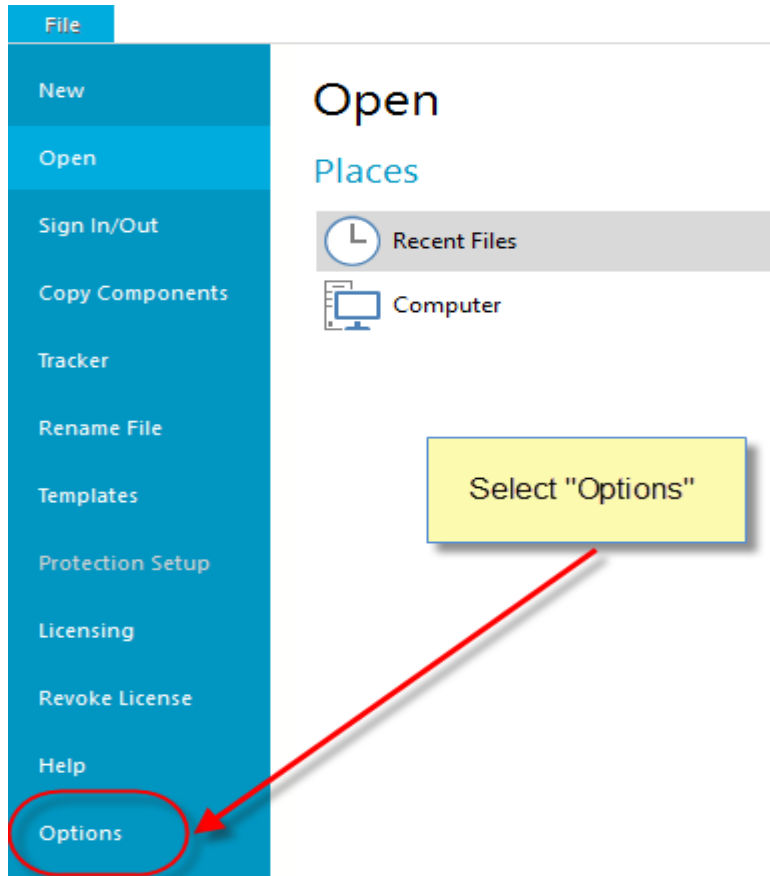


VERSION 6.00

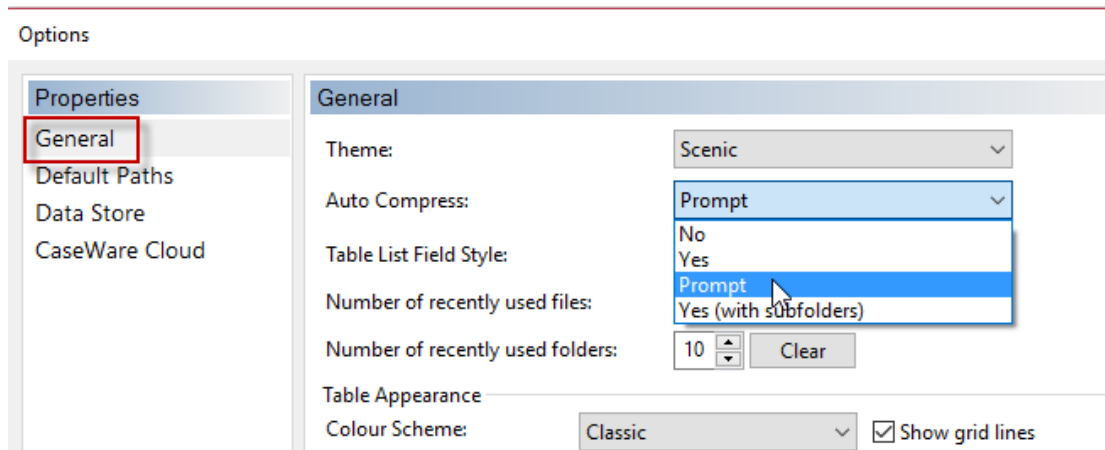
**PROCEDURE SUMMARY**

1. Follow the procedure for downloading CaseWare Working Papers ..... 3
2. Follow the procedure for installing CaseWare Working Papers ..... 3
3. Open CaseWare Working Papers and choose “Options” ..... 3
4. Select Templates. .... 5

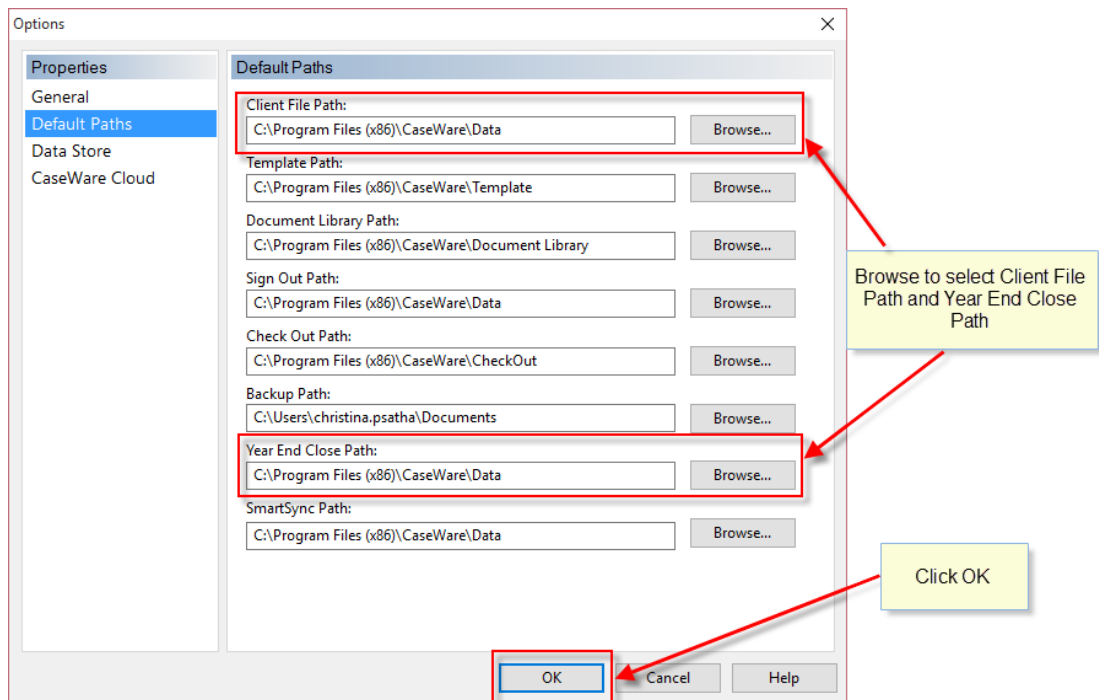
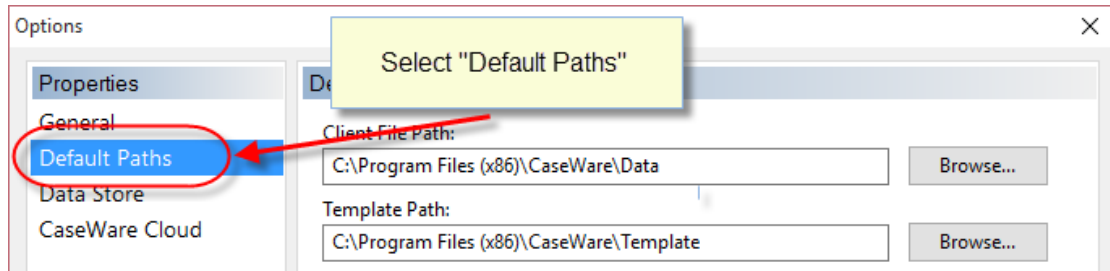
1. Follow the [Procedure for downloading CaseWare Working Papers](#)
2. Follow the [Procedure for installing CaseWare Working Papers](#)
3. Open CaseWare Working Papers and choose "Options"



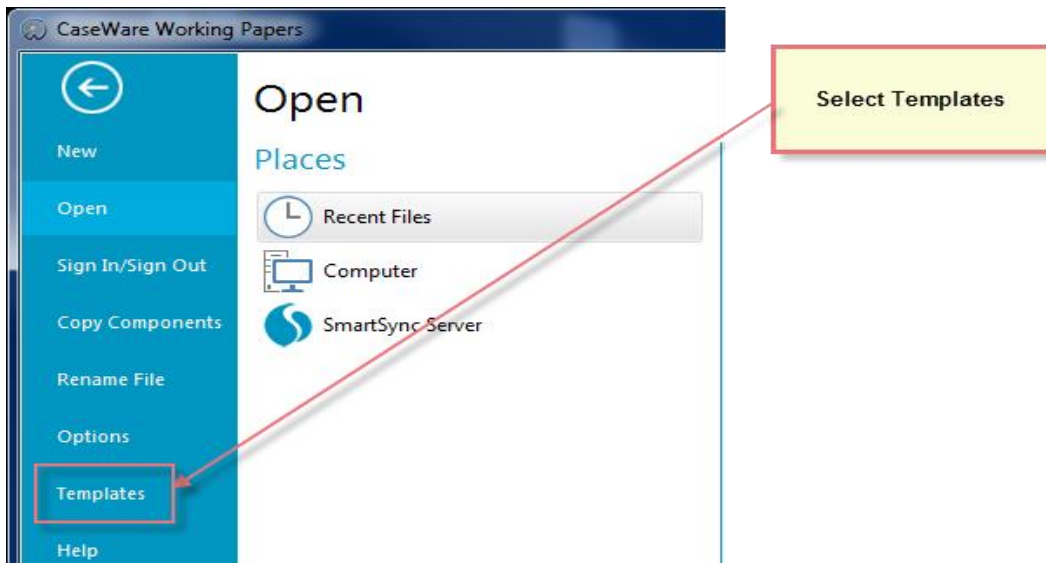
- a. In General / Auto Compress select Prompt in order to have the option to compress files



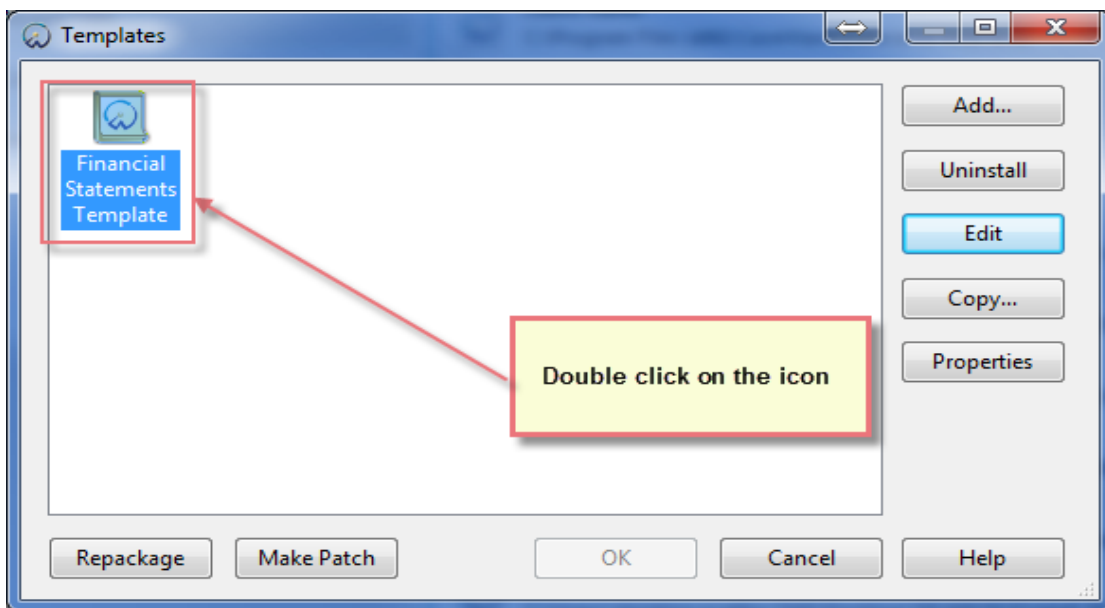
- b. Select Default Paths. Browse to select the correct Client file path and Year End Close Path. Click OK.



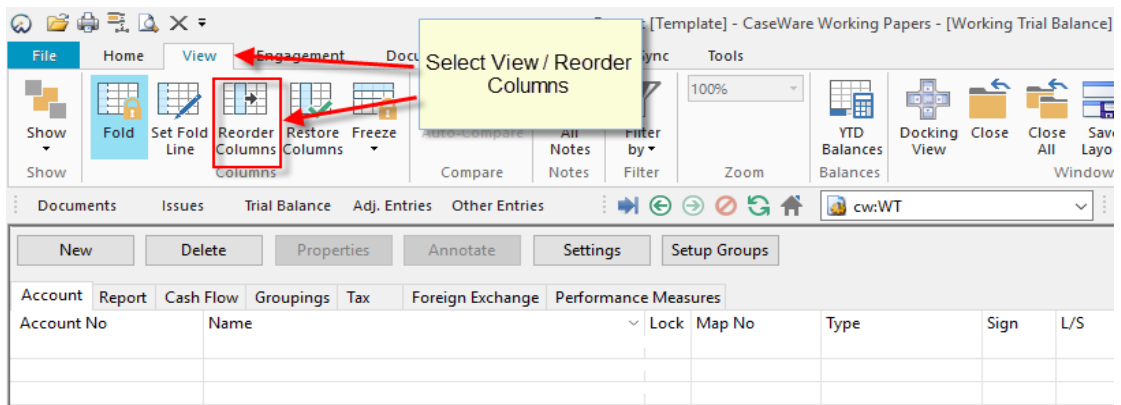
#### 4. Select Templates.



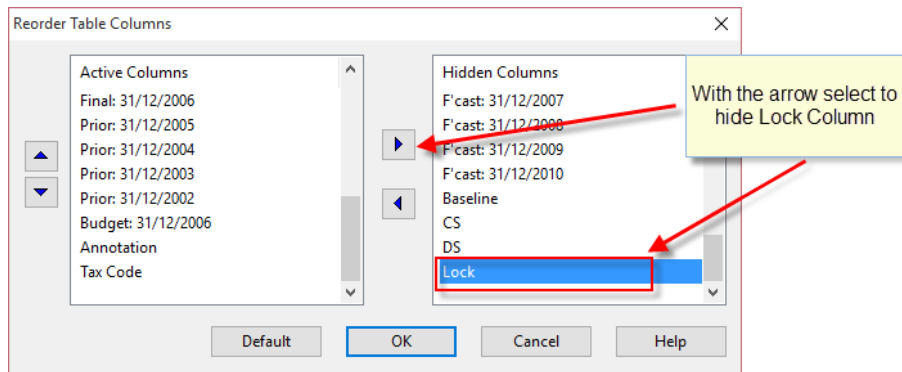
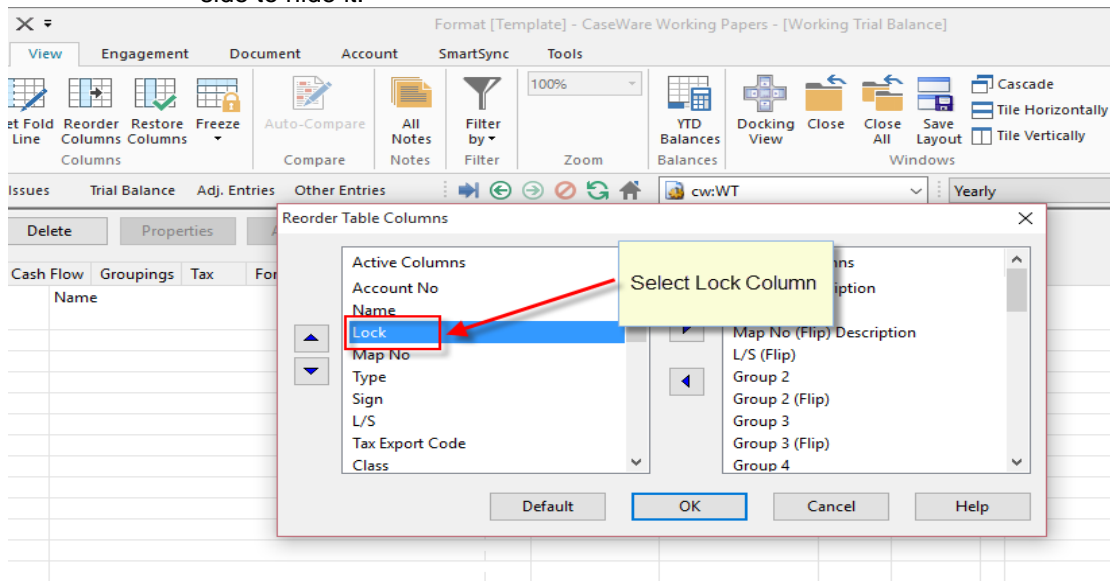
a. Select to open Financial Statements Template



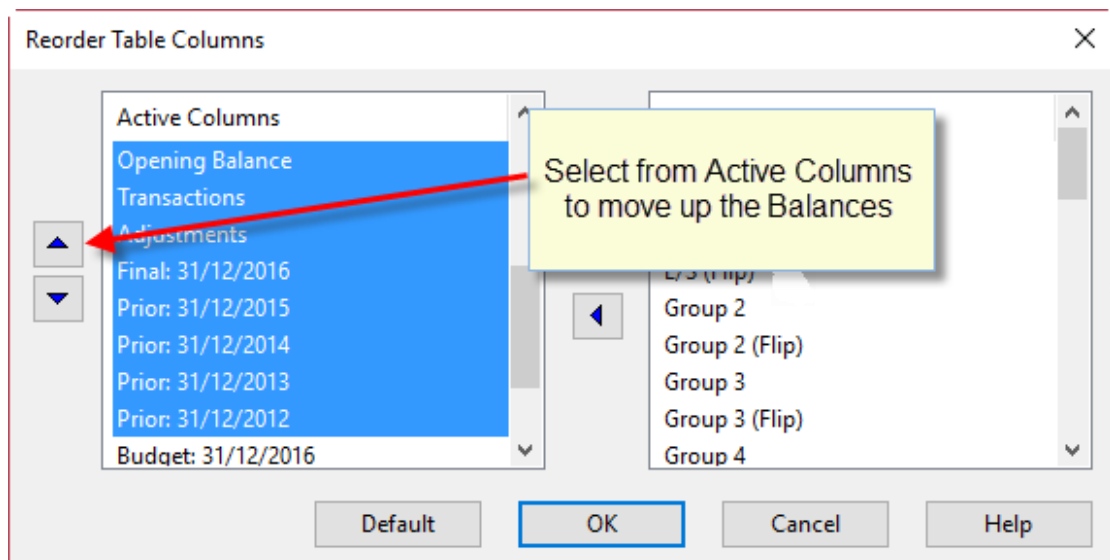
b. In Trial balance Select View/Reorder Columns

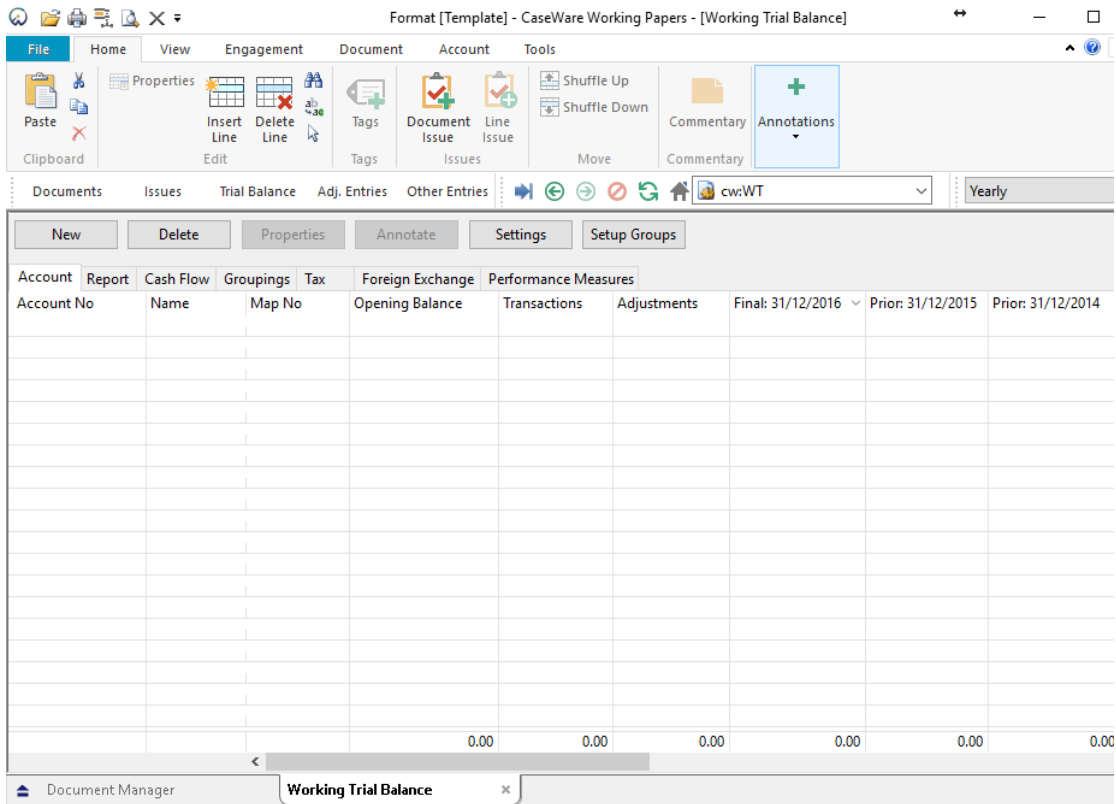
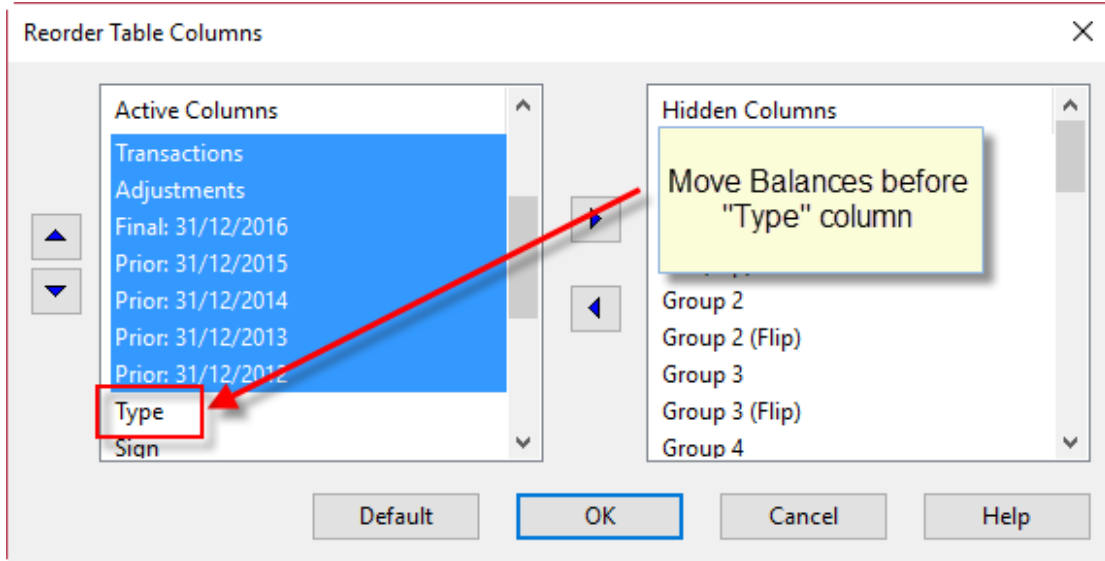


- c. Select Lock column from the left side and with the arrow move it to the right side to hide it.



- d. Select to move “Balances” columns before “Type” column to be easier to identify them in Trial balance





CaseWare Working Papers setup is now completed.