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~~Creating New~~

~~Client Files~~

~~Working Papers:~~

~~Importing Microsoft~~

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help includes both

reference and step-

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information. View our Getting Started Guide, use the main categories below, the Search bar located above, or the Menu located in the top right corner to find the topics most relevant to your needs. CaseWare Working Papers; Engagement

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Option Description;
Role Set . Select a
role set to apply to
the document from
the drop-down
menu.. Prepared
by/Reviewed by.
Select to populate
your initials for the

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role, or manually
enter the initials of
the user that
completed the role.

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Word and Excel
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Select the drop
down menu to
choose how the file
should be opened.
Select to make this

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document a Papers

placeholder. Enter a file name or click Browse to navigate to a file. Click the drop down menu to select a template. Select the drop down menu to choose how the file should be opened.

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Document Refere

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Procedure. On the Home ribbon, click Manual Document Reference. Tip: See alternative methods to performing this step. Complete the fields of the dialog.

>>Quick

Reference. Click

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OK. Alternative
methods to
creating manual
documents. x.

Right click in the
Document Manager
to open the
shortcut menu and
select | New |
Manual Document.

Creating Manual Documents - CaseWare

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Training |

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would like to learn
the basics when
getting started with
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are under
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to cut audit costs
or provide more
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information can
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staff permissions
and facilitates
single sign on.

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guide on the
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Community for the
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