

## Caseware Cloud Instructions:

**Caseware Cloud** is our secure client portal for you to collaborate with your audit team and uploaded requested documents. We take the security of client information very seriously and so have started using Caseware Cloud as we believe it is more secure than sharing documents via email or USB. You can read up on the security details of Caseware Cloud here: <https://www.caseware.com/solutions/cloud/security>

The request of information that we provide is crucial in ensuring your audit is completed in a timely manner and within the agreed fee. We ask that you prioritise the important of filling out the checklist before the start of the audit.

If you are unsure of any request in the checklist, we ask that you clarify the request with your auditor.

If you have any questions about how to use Caseware Cloud, please don't hesitate to contact Kate on [kate@sawarddawson.com.au](mailto:kate@sawarddawson.com.au) or (03) 9894 2500.

## Activating and Creating your Account

1. **Activate** your account. Open the email you received and press activate account. You will then be prompted to create a password. Please make sure that it meets the security requirement of being more than 8 characters.



Saward Dawson

< Back

**Activate Your Account**

Email address

tester@tester.com.au

Choose a password

●●●●●●●●

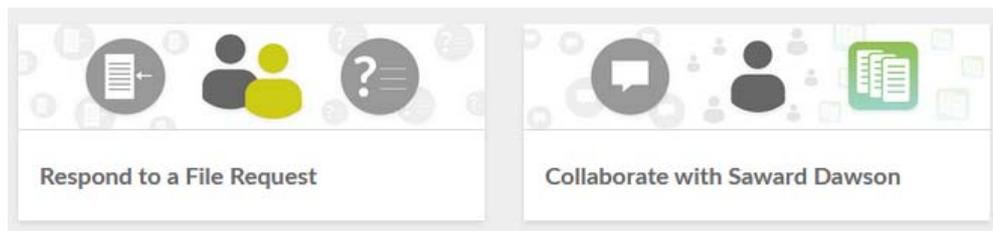
Re-type your chosen password

●●●●●●●●

Minimum 8 characters ?

Activate Your Account

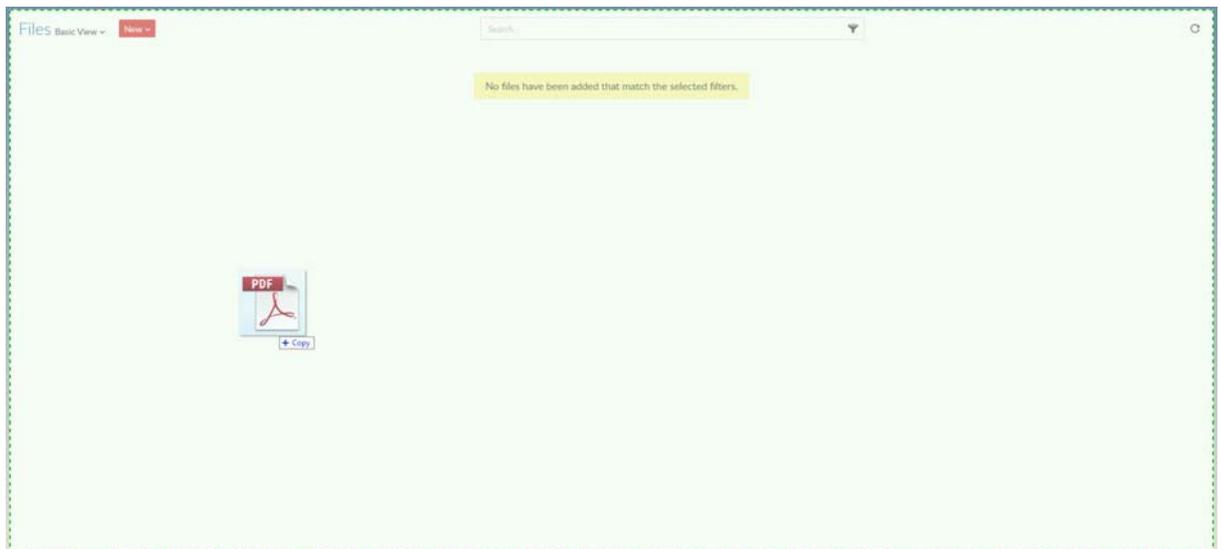
2. Please continue to **sign in** and **read and agree** to the terms of use.
3. Select “**Respond to a File Request**” option and read the overview of what you will be able to do.  
Press back and Select “**Collaborate with Saward Dawson**” option and read the overview of what you will be able to do. Once you have read these you can **close** the pop up.



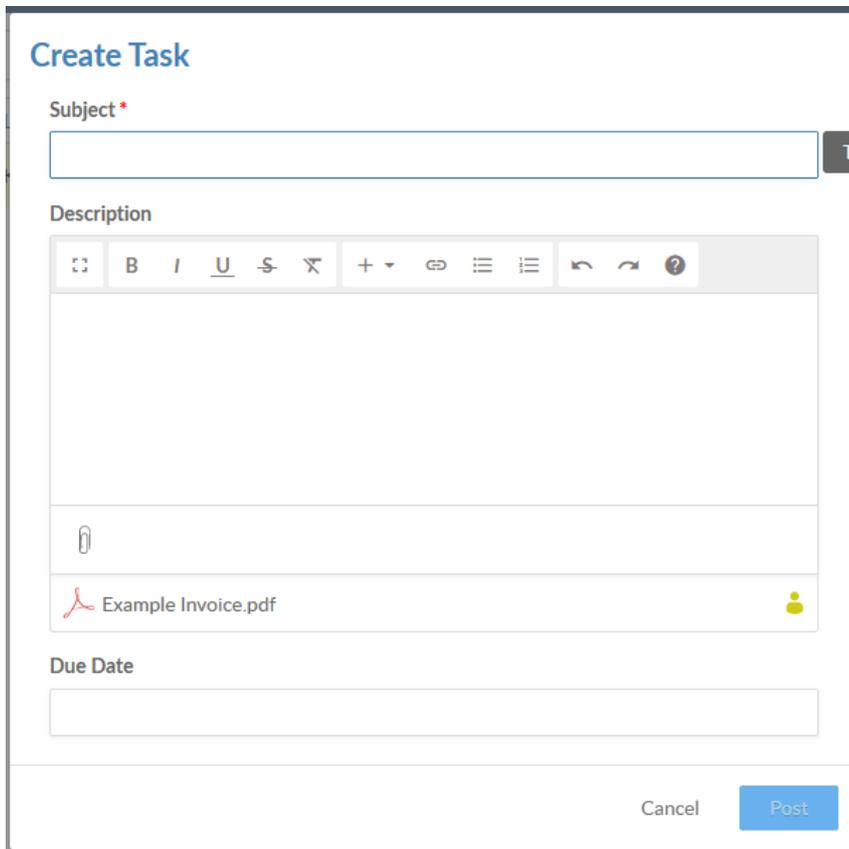
4. You should be directed to the files **homepage** . Go to the top left hand side and select the **menu**. Then select **overview**. This is where you will be able to view your tasks and questions from the auditor.

## Uploading files to the auditor

1. If you need to **upload** a file that the auditor has asked you for, please **drag** and **drop** into the files homepage



- From here you will be able to **download/replace/delete/view** the document as well as **allocate** it to a discussion/task or file request. This can be done through selecting the document and then the  symbol.

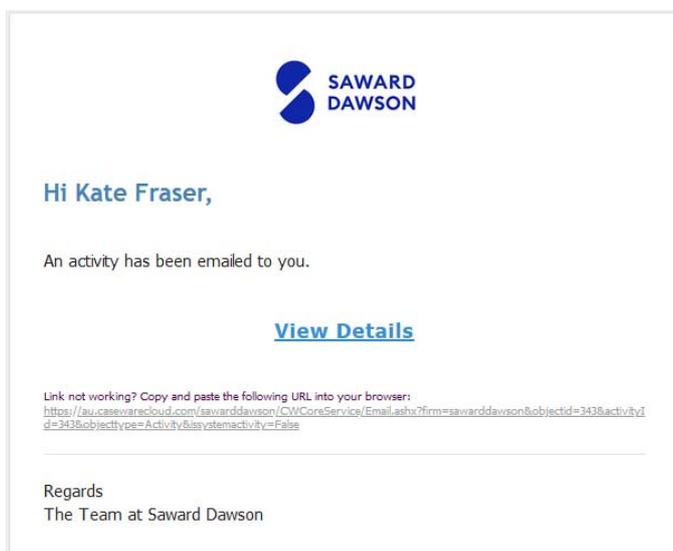


The screenshot shows a 'Create Task' form with the following fields and elements:

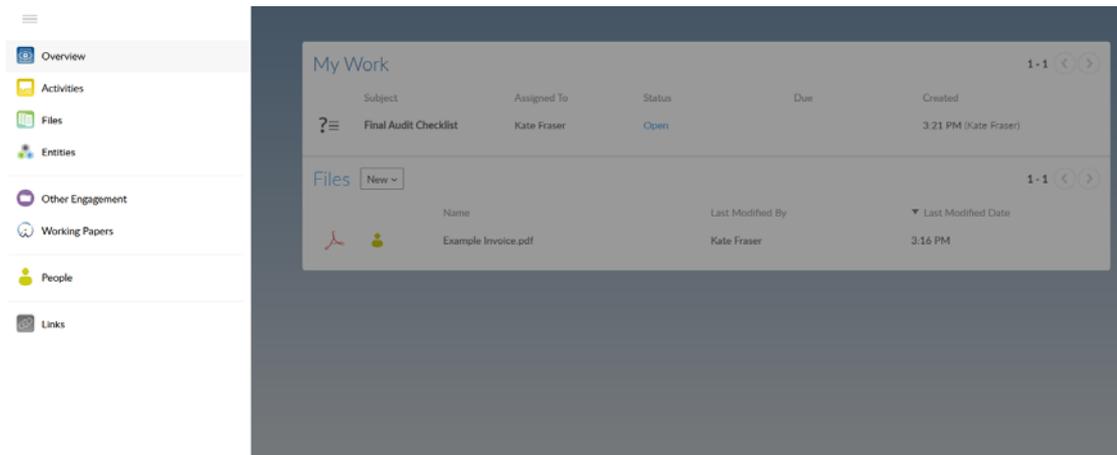
- Subject \***: A text input field.
- Description**: A rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), link (Globe), list (List), list (List), undo (Left Arrow), redo (Right Arrow), and help (Question Mark).
- Attachments**: A section showing a file named 'Example Invoice.pdf' with a red Adobe PDF icon and a user profile icon.
- Due Date**: A text input field.
- Buttons**: 'Cancel' and 'Post' buttons at the bottom right.

## Responding to a checklist

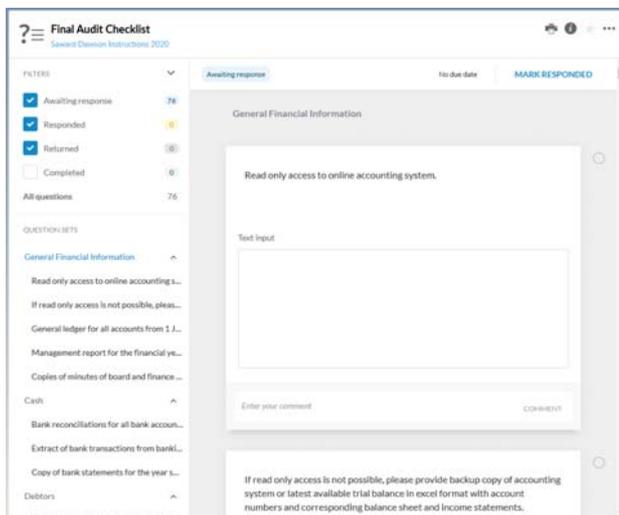
- If you **receive** the request via **email** it will look like this. Please select view details.



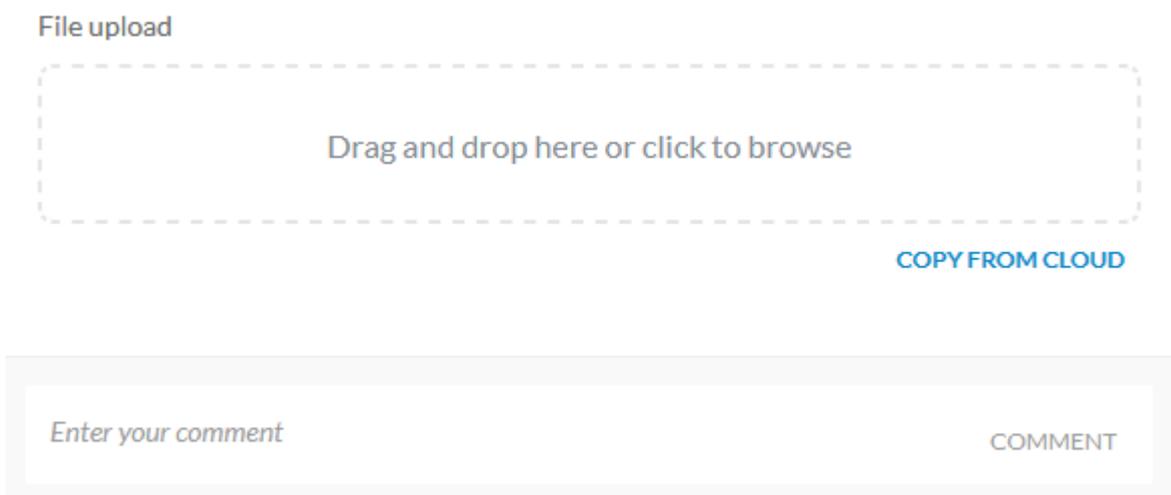
- Alternatively the request will show on **your homepage**. In the overview section under the menu.



- Click on the request. Your request will look like the below, but the lines may differ depending on what documents are required for your audit/review.

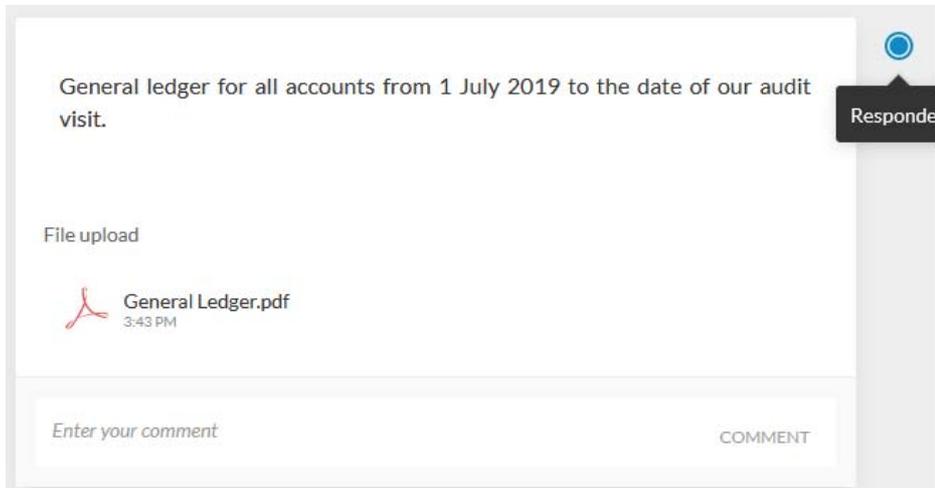


- Please **drag and drop** the requested file. If you have any notes to accompany the document please enter a **comment** in the section allocated.



5. Once your document is uploaded, press the **circle** on the top right of the to show that you have **responded to the request**.

You will note that you cannot tick as responded unless you upload a document. If you are unsure what is required to be uploaded please talk to your auditor, you can contact the team by using the + symbol and creating a discussion.



6. If you have accidentally ticked **Responded** and want to add a different document to a request, please contact your auditor or upload the document to the **Overview** page.
7. Once you have fully **completed** the checklist press the **mark responded** button and an email will automatically be sent to your audit team notifying them that the task is complete. You will notice that if you mark as responded the task will disappear from your Overview screen. You can go back into that query by clicking Activities under the Menu.

