



FREQUENTLY ASKED QUESTIONS

CaseWare Cloud and IDEA CloudShare



1. What is CaseWare Cloud?

CaseWare Cloud is a web service for managing your organization and workflows. Its features and apps combine to provide a convenient and centralized solution for the management of both your organization and your engagements.

2. Where is CaseWare Cloud located?

CaseWare Cloud currently operates on the computing resources provided by the Amazon Web Services (AWS) infrastructure in Australia, Ireland, and the United States.

3. What is IDEA CloudShare?

IDEA CloudShare gives you access to your firm's entities and associated projects and files in CaseWare Cloud. With IDEA CloudShare, you can upload your project files to the cloud to share your work with other team members or download files from the cloud to your local IDEA projects or local library. You must be a registered CaseWare Cloud user to use IDEA CloudShare.

4. What is MyCaseWare?

MyCaseWare is the CaseWare Account Management System. It is a portal that allows CaseWare Cloud administrators to configure their firm's CaseWare Cloud environment which is required for IDEA CloudShare to work.

5. Who is a CaseWare Cloud Administrator?

Each customer who purchases an IDEA Standard license will need one person to be the CaseWare Cloud Administrator. During setup of your IDEA Standard license, your IDEA Partner will send this person an email invitation to set up their MyCaseWare account and their firm's CaseWare Cloud environment.

Each customer needs to set up their own cloud firm so that all IDEA users within the firm can use the IDEA CloudShare feature.

6. How do I get access to CaseWare Cloud as an administrator?

As a CaseWare Cloud Administrator, you will receive a MyCaseWare email invitation from your local IDEA Partner. Through the MyCaseWare Portal, you can create your firm on CaseWare Cloud.

7. How do I get access to CaseWare Cloud as a user?

Your firm's CaseWare Cloud Administrator(s) will send you an email invitation to set up a password for your CaseWare Cloud account.

8. How do I know that I am registered for CaseWare Cloud?

All registered users will receive an email invite to complete their CaseWare Cloud registration. Additionally, your firm's CaseWare Cloud Administrator(s) will be able to view your registration details on CaseWare Cloud.



9. How do I find my firm's CaseWare Cloud URL as an administrator?

After you configure your firm in MyCaseWare, you will receive an email that contains the CaseWare Cloud URL. Additionally, after configuring your firm's instance on CaseWare Cloud, you can log in to the MyCaseWare Portal, click the 'Licenses' tab to view your CaseWare Cloud URL under the CaseWare Cloud License section. Use this URL to log in to CaseWare Cloud via IDEA CloudShare.

10. How do I find my firm's CaseWare Cloud URL as a user?

Your firm's CaseWare Cloud URL will be included in the email invitation sent to you by your firm's CaseWare Cloud Administrator.

11. What is an entity in CaseWare Cloud?

An entity is a general concept that can represent an organization, department, individual or client. Entities are independent workspaces related to the firm which can be internal or external. They provide a method of constructing organizational divisions within CaseWare Cloud. When a firm first configures Cloud, a single entity representing the firm is created by default. This entity cannot be deleted. Additional entities can then be added.

12. Who has access to my cloud projects in an entity?

By default, all users with access to an entity will have access to all projects under that entity.


13. Can I create entities in IDEA CloudShare?

You cannot create entities in IDEA CloudShare. Entities can only be created using the web interface by a user with Admin rights within CaseWare Cloud directly.

14. How can I distinguish between the Local side and Cloud Side in IDEA CloudShare?


In IDEA CloudShare, the Local pane (left side) represents your local machine and the Cloud pane (right side) represents your file structure in CaseWare Cloud. Additionally, the Cloud pane displays the cloud entity name and gives the option to create new cloud projects.

15. How can I view my files on my firm's CaseWare Cloud website?

Click the collapsible navigation button  (at the top left corner) and then click 'Files' to see your files for the selected entity.

16. As a user, can I add the auditee/client as a contact in CaseWare Cloud?


Yes, an auditee/client can be created or imported through CSV as a contact in CaseWare Cloud.

Click the collapsible navigation button  (at the top left corner) and then click Contacts to add the auditee/client as a Contact.



17. On my firm's CaseWare Cloud website, how can I share an IDEA file with my clients?

To share files, you must have the Owner permission associated with the files you want to share.

Select the file to open up a function window. Click the 'Share' button . From the Share dialog box, select the check boxes associated with the users with whom you want to share the file. You can share files with non-administrators. The user must have viewer permissions (at least) to be able to access the file. To share the file with a user, you need to assign a role to them which can be done using the 'Assign roles to' feature in the Share dialog box itself.

18. How do I notify my auditee/client to upload a file so that I can import it into IDEA?

After you have added your auditee/client as a contact, you can send a file request to them.

Note: To send the File Request to the contact, the contact must be assigned to one of the roles for the selected entity.

19. How much data can I store on CaseWare Cloud?

Under the CaseWare Cloud Fair-Use Policy, you are allowed to store up to 20 GB of data.

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21. Where can I find security certificates for CaseWare Cloud?

The security certificates for CaseWare Cloud can be found here:

- [Cloud security certifications and procedure FAQ*](#)
- [Cloud security compliance**](#)

*www.caseware.com/compliance/cloud-security-certifications-and-procedures-faq

**<https://www.caseware.com/ca/cloud-security-compliance>

To learn more about CaseWare Cloud and
IDEA CloudShare, or for information on how to upgrade,
contact us at ideasupport@caseware.com.



CaseWare IDEA Inc.

1400 St Laurent Blvd., Suite 500, Ottawa, ON K1K 4H4 Canada

1-800-265-4332 | ideasupport@caseware.com | www.idea.caseware.com

About CaseWare IDEA

CaseWare IDEA is an internationally recognized data analytics software company that provides solutions for auditors, finance professionals and compliance officers in the banking, accounting, government, healthcare, utilities, insurance and online retail sectors. A leader in the audit and accounting industries for over 25 years, IDEA® Data Analysis Software equips auditors, accountants and other finance professionals with a toolkit that allows them to perform data analysis quickly for various audit-related tasks: from payroll monitoring to providing assurance.

Caseware solutions are used by over 400,000 users, in 130 countries and in 16 languages. To learn more, visit idea.caseware.com.

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