



Procedure on how to delete local copies and remove files from Cloud



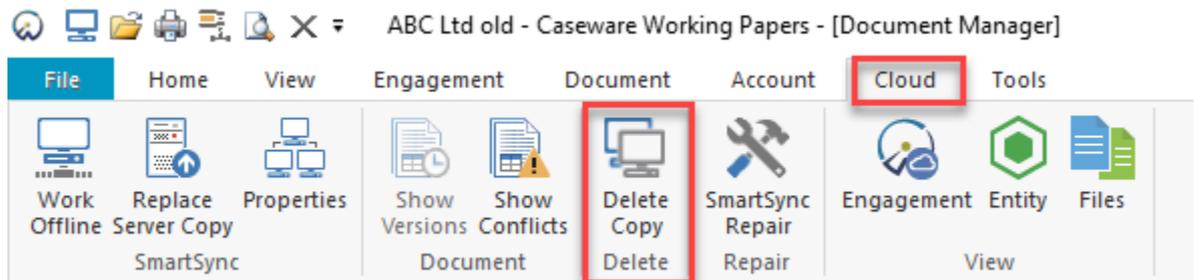
VERSION 1.00

PROCEDURE SUMMARY

1. Open your local SmartSync copy and select to Delete Copy. 3
2. Access Caseware Cloud either via a browser or through a different Working Papers file and select the appropriate entity and click on it to enter the entity's page 3
3. Check if there are any remaining sync copies and if any remain that cannot be manually deleted, you must abandon them. Note that after abandoning a sync copy that file will still remain on the user's PC 3
4. Delete the file from Cloud..... 5

Before removing the file from the Cloud, the first step is to delete all existing SmartSync copies

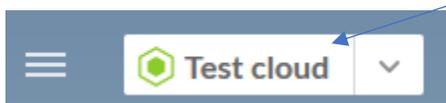
1. Open your local SmartSync copy and select to Delete Copy.
 - a. Select Cloud / Delete Copy



Note: This must be done by each user that has a SmartSync copy

After the SmartSync copies are deleted, we can go to Caseware Cloud (**step 2**) and delete the file (**step 4**). If for whatever reason a copy cannot be deleted, we can manually remove its connection to the parent file by abandoning it (**step 3**)

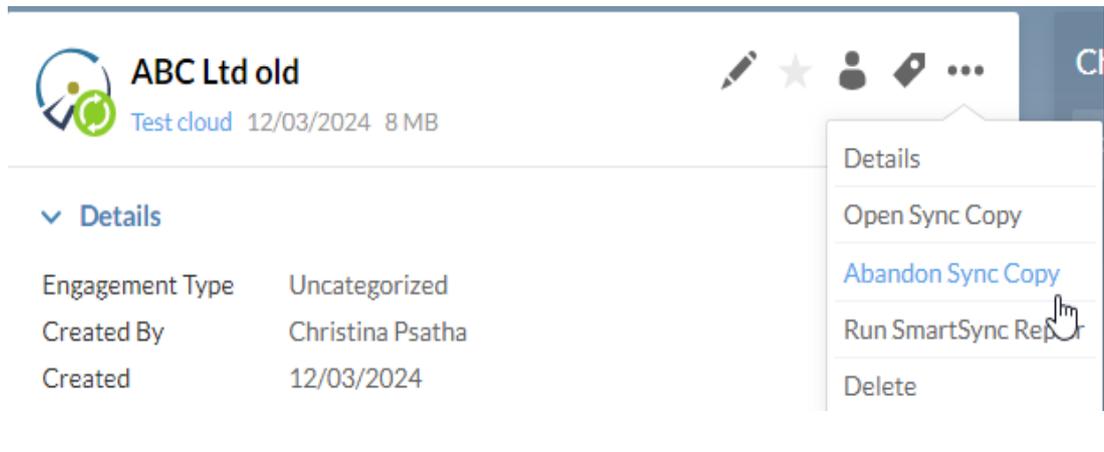
2. Access Caseware Cloud either via a browser or through a different Working Papers file and select the appropriate entity and click on it to enter the entity's page



3. Check if there are any remaining sync copies and if any remain that cannot be manually deleted, you must abandon them. Note that after abandoning a sync copy that file will still remain on the user's PC
 - a. Under Engagements find the file and click somewhere on the right to bring up its menu



- b. A menu window will appear, select to Abandon Sync Copy. Select all remaining sync copies. Click OK



Abandon Sync Copy

- (EUP1PSSS-001167) 12/03/2024 16:19
 - Christina Psatha (KORTAPC) 12/03/2024 11:05
C:\Program Files (x86)\CaseWare\Data\ABC Ltd old\ABC Ltd old

Cancel

OK

- Select Yes on the Warning “Are you sure you want to abandon all sync copies”

Warning

Are you sure you want to abandon all sync copies?

Yes

No

Note: To refresh the page, select another engagement.

4. Delete the file from Cloud.
 - a. Under Engagements find the file and click somewhere on the right to bring up its menu
 - b. From the menu select to delete the file from Cloud. Select Yes

The screenshot shows a file management interface for a file named "ABC Ltd old". The file is categorized as "Testcloud" and was created on "12/03/2024" with a size of "8 MB". The interface includes a "Details" section with the following information:

Engagement Type	Uncategorized
Created By	Christina Psatha
Created	12/03/2024

Below the details is an "Assigned" section, which currently shows "None". A context menu is open on the right side of the file, listing several actions: "Details", "Open Sync Copy", "Clear SmartSync Information", "Run SmartSync Repair", "Delete", "Mark as Unread", "Move to Entity", "Move to Folder", and "Set Retention". The "Delete" option is highlighted with a mouse cursor.

Confirm Delete

 Are you sure you want to move ABC Ltd old to the Recycle Bin?

Yes

No