

# AuditAdvanced

(HAT) Charity Template

Engagement File Update

v24.0.01 to v24.0.02

## Further Information on the v24.0.01 to v24.0.02 Update

(please also review the v24.0.00 to v24.0.01 update notes previously released)

### i) Application of updated mapping

There are always likely to be mapping changes from one year to the next when an engagement file is updated.

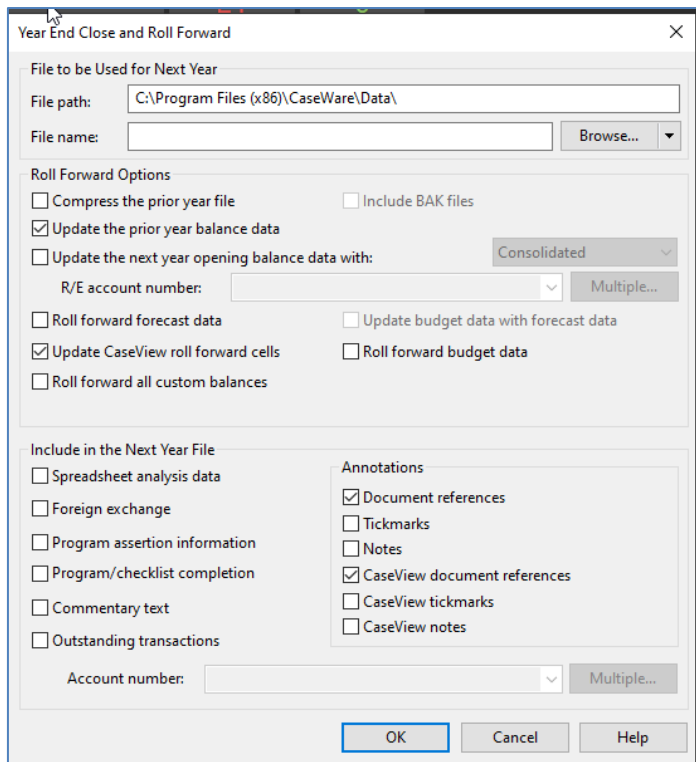
To apply the new mapping to your engagement file please follow the details in our article that can be found on our Help Site [here](#).

### ii) Updating Year End Close settings in WP 2022

The v24.0.02 Charity Template will only run on WP 2022 and above. Sometimes the installation of a new version of Working Papers will cause some previously saved settings to be reset.

Normally, settings for the Year End Close routine will be retained on an individual machine, however these may have been reset with the update to WP 2022 and it is important that this is checked.

Throughout the templates links are provided to other documents within the template and some of these can only be linked through 'Annotations'. Whatever else your personal settings are, it is important that on a roll-forward the 'CaseView document reference' is ticked under the 'Annotations' section, otherwise these links will be removed from the file during the roll-forward process.

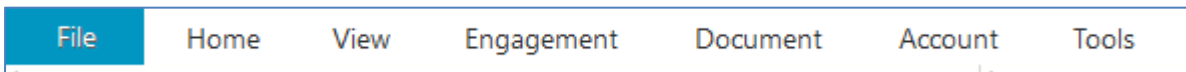


### iii) Amended roll-set

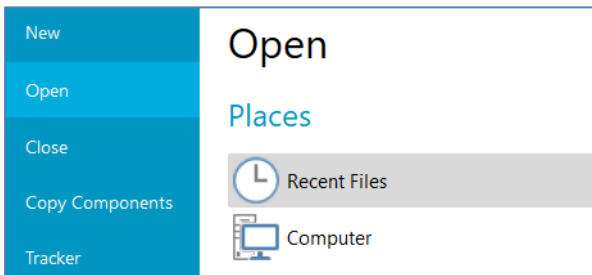
The v24.0.02 Charity Template has amended the role previously called “EQCR Review” to “HOT/EQR Review”.

To effect this change in an updated engagement file you will have to use Copy Components to bring the updated role into the engagement file.

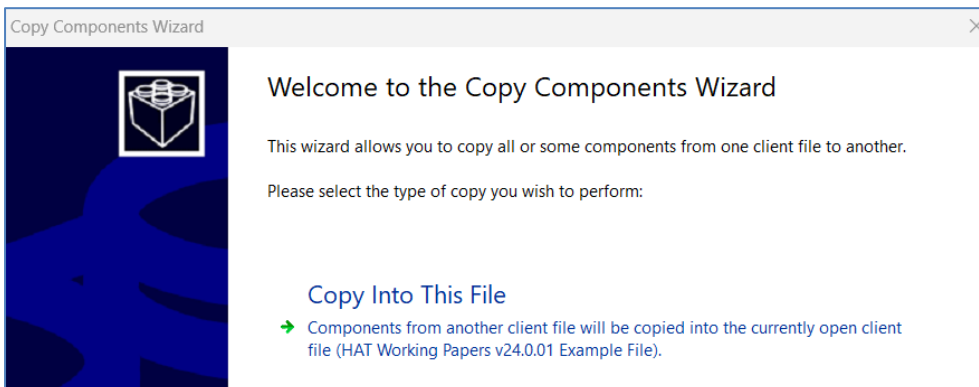
Select ‘File’ from the Caseware menu bar



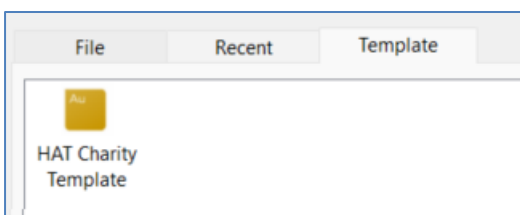
Select ‘Copy Components’



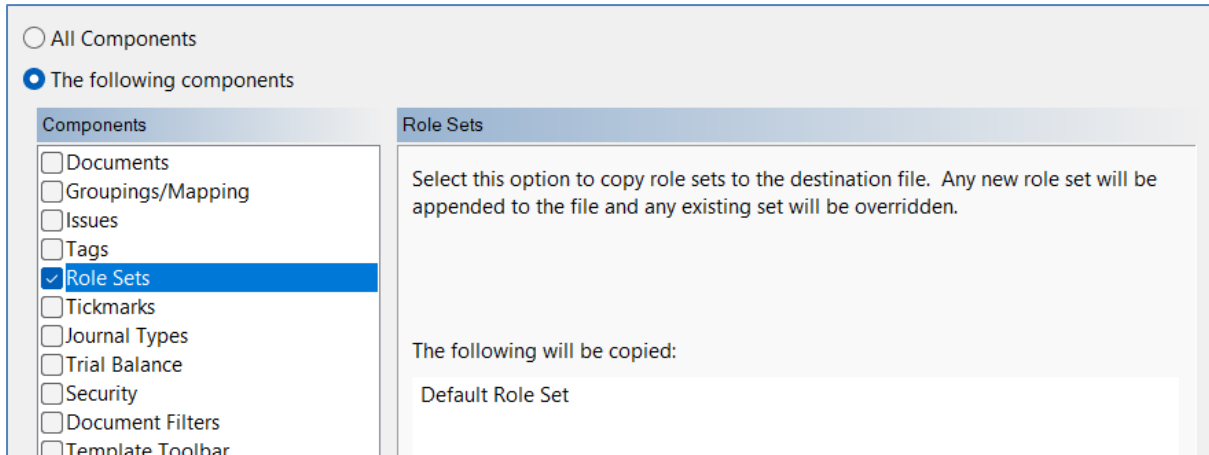
Choose the ‘Copy Into This File’ option from the Copy Components Wizard



Select the ‘HAT Charity Template’ from the ‘Template’ tab in the Select Source screen



Select the Role Sets component in the Copy Components screen



When you finish the wizard you will see the updated Role Set under Tools / Options / Roles

