Get started with Hybrid Cloud

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Overview

Hybrid Cloud is what we call the integration of CaseWare Cloud products with CaseWare Working Papers. In this ‘hybrid' environment, users can benefit from the familiarity of their desktop accounting software while including the advancements and accessibility that Cloud brings. Setting up the Hybrid Cloud environment for your organization will help with the eventual transition to a purely Cloud-based solution.

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About Cloud integration

Integrating Working Papers with Cloud expands the functionality of Working Papers to include Cloud specific features and apps. This integrated environment allows you to easily store and manage your engagement files, improve collaboration between staff and clients and track the progress of your engagement from Working Papers by utilizing Cloud functionality.

Collaboration:

- Share documents with clients and colleagues
- Request information from clients by integrating Working Papers with the Queries app (note that Queries may have a different product name in your region)

Engagement management:

- Publish engagement files from Working Papers to Cloud entities
- Create sync copies from published Cloud files and work on them in Working Papers
- Back up previous engagement files and store them on Cloud for archival purposes
- Perform tests on a file's working trial balance and generate detailed reports with the AnalyticsAI app

Engagement tracking:

- Synchronize metadata, such as engagement properties, deliverables and their due dates between the engagement file and a Cloud entity.
- Populate dashboards with synchronized metadata to visualize the progress of your engagement

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Migrate data to Cloud

To get started with Hybrid Cloud, you'll need to migrate your organization's existing data to Cloud. The data you can migrate includes staff and contact lists, trial balance or general ledger data, entities (client workspaces) and Working Papers engagement files.

Prerequisites:

- Your organization must have Working Papers with SmartSync technology. If you do not have SmartSync, contact your local distributor for more information.
- Your organization must have a CaseWare Cloud site. If you do not have a Cloud site, you can request an invite.
- You must have an internet browser that supports TLS 1.2 or later. For more information, see Disabling access to CaseWare Cloud for older and unsupported browsers.

Recommendations

- Organizations with large data sets should migrate their data using the Migration Manager.
- Organizations with smaller data sets should perform the migration directly in Cloud.
- If you need to migrate data from a third-party accounting software package, use the Cloud Import Utility to transfer the data directly to Cloud.

Migrate large data sets using the Migration Manager

The Migration Manager is an administrative tool that helps you simply and securely migrate large quantities of data to Cloud. Organizations who want to use the Migration Manager must contact CaseWare Support with the following information:

- Intended migration date(s)
- Size of active client data
- Size of inactive client data
- Number of files to migrate (current and prior year)
- Number of users

Additionally, your organization must confirm that they will not attempt to migrate files that have been associated with a different organization.

Prerequisites:

- Your organization must be using Working Papers 2019 or later.
- You must install the Migration Manager on the computer or server containing the data to migrate.
- An administrator must operate the Migration Manager on behalf of the organization (administrative privileges are required).
- You must connect the Migration Manager to your Cloud site to access all migration options. On the main menu, click **Log In** and enter your Cloud site URL and administrator credentials. You do not need to include the web protocol (*http://* or *https://*) in the URL.

Recommendations:

- Validate the health of your files prior to migration. See Validate engagement files for more information.
- Where possible, ensure that the engagement properties in your files contain as much information as possible to assist in the auto-map process. See Upload entities to Cloud for more information.

- Compress all parent files prior to migration to reduce migration times. Ensure you include all subfolders during compression.
- Back up all parent files prior to migration. The original files on your server will be migrated to Cloud.
- Run only one instance of the Migration Manager at a time. Multiple instances will not speed up the processing time and can negatively impact Cloud performance.
- Restart self-hosted SmartSync Servers after a migration to clear the engagement file list. If you migrate your data in stages, restart the server after each stage.

Estimate the migration time

To help you schedule your migration for minimal disruption, see the following migration time estimates. Note that these estimates were created using a controlled environment. Actual migration time may differ.

Number of files	Compressed file size	Contains custom metadata	Upload size	Time
7915	54 MB	Yes	425 GB	39 Hours
1549	211 MB	No	325 GB	24 Hours
1451	211 MB	No	305 GB	20 Hours
3000	211 MB	No	630 GB	43.5 Hours
1000	211 MB	No	210 GB	13 Hours

To reduce migration time, we suggest that you complete the following actions:

- Compress all parent files, including subfolders
- Delete unnecessary sync copies
- Clear synchronization information for archived files
- Upload entities and staff in advance of the file migration

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Depending on the quantity and size of the files you are migrating, you may need to complete the migration over a period of several weekends. For information on segmenting the process, see Migrate engagement files to Cloud.

Validate engagement files

We suggest that you validate your organization's engagement files to determine if they are ready for migration to Cloud. Some common issues that will prevent validation of a file include:

- The file is corrupt
- The file is a sync copy rather than a parent file
- The file's name includes unicode characters
- The file's version is older than Working Papers 2011
- The compressed file does not include subfolders

If possible, ensure that you resolve these issues prior to validation. If any of these issues are discovered after a validation attempt, resolve them and try the validation again.

To validate your engagement files for migration:

1. Launch the **Migration Manager**.
2. On the main menu, click **Validate Files**.
3. Click the folder icon and browse for the folder containing the files that you want to validate. Click **Select Folder**.
4. Click **VALIDATE**.

The results of the validation process display in the validation report. For more detailed information, view the automated log file by clicking the link provided. Click **CLOSE** to return to the main menu.

Upload entities to Cloud

Entities are workspaces that store all the relevant information for a particular client, including business and contact information, documents and engagement files. You can upload a list of entities to Cloud using a .csv file. When preparing the .csv file, ensure that:

- Each entity contains at minimum an entity name and number
- Each row represents one client entity
- Each column represents a property (e.g. client name, operating name, website)
- Multiple tags are placed between quotes and separated with commas

For example:

Entity name	Location	Entity number	Start date	Fiscal year end	Tags
Chockablock Industries	Toronto	4829	09 Jul 2012	December	"Retail, Partnership"
Superior Furniture	Toronto	5937	22 Aug 2010	December	Retail

We suggest that you include as many properties as possible to ease the process of mapping your engagement files to the correct entities later on in the migration.

To upload entities from a .csv file:

1. Launch the **Migration Manager**.
2. On the main menu, click **Upload Entities**.
3. The Import Entities dialog displays in Cloud. Select the applicable import options.
4. Click **Import from CSV** and browse for your .csv file, or copy and paste the content from your .csv file into the text box. Click **Next**.
5. The entities from your .csv file display in a table. Assign the applicable heading for the data in each column. Note that columns with the Ignore heading will not be uploaded.
6. Click **Import**.

The entities are uploaded to Cloud. You can view all of the entities in your Cloud site by clicking **Entities** on the Cloud menu. Close the Import Entities dialog to return to the main menu.

Upload staff to Cloud

You can upload a list of your staff members from a .csv file, shared data store (.cwc file) or data store export file to get them started with their own Cloud account. Note that each staff member added to Cloud will receive a registration email from *donotreply@casewarecloud.com*. We suggest whitelisting this email address to prevent your spam filters from blocking the email.

If you are preparing a .csv file, ensure that:

- Each staff member has at minimum a first name, last name and unique email address
- Each row represents one staff member
- Each column represents a property (e.g. first name, last name, email)
- Multiple staff groups are separated with tildes (~)

For example:

Last name	First name	Email address	Initials	Title	Phone number	Group
Barnett	Betsy	betsy.barnett@peakstreak.com	BB	Senior	416-555-5117 Ext: 128	G1
Henry	Isabel	isabel.henry@peakstreak.com	IH	Supervisor	416-555-5117 Ext: 176	G1~G2
Holt	Ben	ben.holt@peakstreak.com	BH	Senior	416-555-	G2

Last name	First name	Email address	Initials	Title	Phone number	Group
					2115	
Nguyen	Nicholas	nicholas.nguyen@peakstreak.com	NN	Senior	416-555-2115	G2

To upload staff from a .csv file:

1. Launch the **Migration Manager**.
2. On the main menu, click **Upload Staff**.
3. Next to the CSV file upload option, click **UPLOAD**.
4. The Staff app displays in Cloud. Click **New | Import | Staff**.
5. The Import Staff dialog displays. Click **Import from CSV** and browse for your .csv file, or copy and paste the content from your .csv file into the text box. Click **Next**.
6. The list of staff from your .csv file display in a table. Assign the applicable heading for the data in each column. Note that columns with the Ignore heading will not be uploaded.
7. Click **Import**.

The staff list is uploaded to Cloud. You can view all of the staff in your Cloud site by clicking **Staff** on the Cloud menu. Close the Import Staff dialog to return to the main menu.

To upload staff from a shared data store:

1. Launch the **Migration Manager**.
2. On the main menu, click **Upload Staff**.
3. Click the file icon and browse for the folder containing the connection (.cwc) file. Select the file and click **Open**.
4. Click **UPLOAD**.
5. A login dialog displays requesting administrator credentials for the shared data store. Enter the credentials and click **OK** to begin the upload.

The staff list is uploaded to Cloud and the upload results display. For more detailed information, view the automated log file by clicking the link provided. Click **CLOSE** to return to the main menu.

To upload staff and groups from a data store export file:

1. Launch the **Migration Manager**.
2. On the main menu, click **Upload Staff**.
3. Next to the DSAT upload option, click **UPLOAD**.
4. The Working Papers Security Import dialog displays in Cloud. Click **Select Files** and browse for your export file, or drag and drop the file into the dialog.
5. The Import Staff and Groups dialog displays with a list of your staff, staff groups and roles. Click **Import**.

The staff list is uploaded to Cloud and the roles display in the Working Papers Security list. You can view all of the staff and groups in your Cloud site by clicking **Staff** and **Groups** on the Cloud menu. Close the Import Staff and Groups dialog to return to the main menu.

Migrate engagement files to Cloud

Migrate your engagement files to Cloud in order to take advantage of Cloud's file management and engagement tracking tools. Prior to migration, you'll need to create a mapping file that assigns each engagement file to its applicable Cloud entity.

To create a mapping file:

1. Launch the **Migration Manager**.
2. On the main menu, click **Map Files**.
3. Click the folder icon and browse for the folder containing the files that you want to map. Click **Select Folder**.
4. Click **AUTOMAP** to assign files to entities based on their engagement properties.

5. A list of each file and their proposed entities displays. If there are any unmapped or incorrectly mapped files, select the box next to the file name and click **MAP**. Select the applicable entity, then click **Apply**. Repeat this process until all engagement files are mapped to an entity.

Note: Clicking **MAP ALL** will map all remaining unmapped files to a specified entity. Mapped files will not be changed.

A mapping file named *CWCloudMigrationMng.csv* is created in the folder containing the mapped files. If you intend to migrate files in stages, refer to this mapping file for the applicable range to migrate. Click **CLOSE** to return to the main menu.

After creating your mapping file, you can begin migrating your engagement files to Cloud. We strongly recommend backing up all files prior to the migration, as the original copies will be automatically deleted afterwards.

To migrate engagement files:

1. Launch the **Migration Manager**.
2. On the main menu, click **Migrate Files**.
3. Click the document icon and browse for your mapping file (*CWCloudMigrationMng.csv*). Select the file and click **Open**.
4. If you only want to migrate a range of files (e.g. files 1-50) rather than all files at once, specify the first and last numbers of the range in the applicable fields.
5. Click **MIGRATE**.

The files are migrated to Cloud and the migration results display. For more detailed information, view the automated log file by clicking the link provided. Click **CLOSE** to return to the main menu.

Migrate small data sets using Cloud

You can set up much of your Cloud environment by migrating existing engagement data or manually creating new data directly from the Cloud interface. This migration method is recommended for smaller or new data sets.

Upload entities to Cloud

Entities are workspaces that store all the relevant information for a particular client, including business and contact information, documents and engagement files. You can upload a list of entities to Cloud using a .csv file.

- To upload entities from a .csv file, see Create client entities from a client list.
- To create entities manually in Cloud, see Create a single client entity.

You can view all of the entities in your Cloud site by clicking **Entities** on the Cloud menu.

Upload staff to Cloud

You can upload a list of your staff members from a .csv file or data store export file to get them started with their very own Cloud account. Note that each staff member added to Cloud will receive a registration email from *donotreply@casewarecloud.com*. We suggest whitelisting this email address to prevent your spam filters from blocking the email.

- To upload staff from a .csv file, see Import staff members or contacts from a list.
- To upload staff and groups from a data store export file, see How to import security configuration settings from Working Papers.
- To add staff manually in Cloud, see Create an account for staff or contacts.

You can view all of the staff and groups in your Cloud site by clicking **Staff** and **Groups** on the Cloud menu.

Migrate engagement files to Cloud

Migrate your engagement files to Cloud to take advantage of Cloud's file management and engagement tracking tools. You can upload your prior year files directly from the Cloud interface and publish your active files to Cloud from Working Papers. After the migration, each file on Cloud functions as the parent in a synchronization hierarchy.

- To upload prior year files from the Cloud interface, see Upload files to an entity.
- To publish active files to Cloud from Working Papers, see Manage the parent file.

If the migration process is interrupted at any time, it will automatically resume after re-establishing a connection.

Migrate third-party data using the Cloud Import Utility

The Cloud Import Utility is a standalone application that enables you to migrate engagement data from a variety of third-party software packages to Cloud. The utility's interface and operation mirrors the import functionality of Working Papers, but instead consolidates the data into an output file that you can upload to Cloud.

- For a list of supported third-party software packages, see Supported third-party desktop accounting software.
- To download the Cloud Import Utility and migrate data, see Import data from a desktop accounting software.

Repeat the migration process for each additional software package you'd like to migrate data from.

Integrate Working Papers with Cloud

Integrating Working Papers with Cloud is the final step to set up Hybrid Cloud. First, you'll need to integrate Working Papers with your organization's Cloud site, which creates the connection between the two platforms. Afterwards, you can further integrate with individual Cloud apps such as AnalyticsAI and Queries to expand the functionality of your hybrid environment.

Prerequisites:

- Your organization must have Working Papers with SmartSync technology. If you do not have SmartSync, contact your local distributor for more information.
- Your organization must have a CaseWare Cloud site. If you do not have a Cloud site, you can request an invite.
- You must have an internet browser that supports TLS 1.2 or later. For more information, see Disabling access to CaseWare Cloud for older and unsupported browsers.

Integrate Working Papers with a Cloud site

When you integrate Working Papers with a Cloud site, you gain access to Cloud's collaboration, file management and engagement tracking tools. You can also access your organization's data and engagement files from any location with an internet connection, making it easier to work offsite.

To integrate Working Papers with a Cloud site:

1. Ensure you close your current engagement file (**File | Close**).
2. On the ribbon, click **File | Options | CaseWare Cloud**.
3. Select **Integrate with CaseWare Cloud**.
4. In the table, click the **Server** field and enter the URL of your organization's Cloud site. You do not need to include the web protocol (*http://* or *https://*). Click **OK**.
5. On the login screen, enter your credentials and click **Sign In**.

Your copy of Working Papers is integrated with the Cloud site. You can integrate with additional Cloud sites by repeating this process, but only one Cloud site can be active at a time. Any files you've migrated to Cloud are now accessible in Working Papers by clicking **File | Open | SmartSync Server**.

Designate the default Cloud site for terminal server users

For organizations where the staff access Working Papers from a terminal server, administrators should designate a default Cloud site in the terminal server's registry. Adding this registry value ensures that closing the remote session does not clear the Cloud site URL and staff can easily reconnect during their next session.

To designate a default Cloud site on a terminal server:

1. Connect to the terminal server and open **Registry Editor**.
2. Navigate to the registry key *HKEY_CURRENT_USER\SOFTWARE\CaseWare International\Working Papers\20xx.00\Core*.
3. Right-click the **Server** key and click **Modify...**.

4. In the **Value** data field, enter the URL of your Cloud site. You do not need to include the web protocol (*http://* or *https://*). Click **OK**.

The default Cloud site is set for connections to the terminal server. Staff can connect to the integrated Cloud site by entering their login credentials.

Integrate Working Papers with AnalyticsAI

AnalyticsAI is a risk-based transaction analysis tool that auditors can use to scan transaction sets and find exceptions that might warrant further investigation. It reduces the time spent in transaction analysis by automatically performing multiple tests on the entire transaction set. With AnalyticsAI integration, firms can improve their audit process by creating AnalyticsAI engagement files directly from Working Papers, uploading trial balance data, and incorporating reports based on specific tests back into Working Papers.

Prerequisites:

- Your organization must be using Working Papers 2020 or later.
- Your organization must have a license for the AnalyticsAI app. If you do not have a license, contact your local distributor for more information.
- Working Papers must be integrated with a Cloud site.

Recommendations:

- Store your engagement files on Cloud by publishing them to a Cloud entity. Published files are accessible from any location where you can log in to your Cloud account and can be immediately linked to an AnalyticsAI file.

Integrate an engagement file with a Cloud entity

In Cloud, each client's data — such as engagement properties, address and contact information — is stored in their own entity. When you create a new engagement file in Working Papers, you can integrate it with the applicable entity to automatically populate the file with information stored on Cloud. To utilize the AnalyticsAI app in your engagement file, you must complete this entity integration process (unless you've already published the file to Cloud).

To integrate an engagement file with a Cloud entity:

1. In Working Papers, open the engagement file that you want to integrate with a Cloud entity.

2. On the ribbon, click **Engagement | Engagement Properties**.
3. On the Name/Address tab, click the **Cloud Entity** field. Enter the name of the entity or click the drop-down menu and select **New** to create a new entity.
4. Client data from the Cloud entity populates the engagement's properties automatically. Click **OK**.

The engagement file is integrated with the Cloud entity. If you need to modify the engagement properties, select **Automatically sync engagement properties with the Cloud Entity** and make your changes in either the dialog or the Cloud entity.

Link the engagement to an AnalyticsAI file

After integrating your engagement file, you'll need to link it to a new or existing AnalyticsAI file before uploading your trial balance data.

To link to an AnalyticsAI file:

1. On the ribbon, click **Cloud**. In the AnalyticsAI group, click **Open**.
2. The AnalyticsAI Setup dialog displays. If applicable, select the AnalyticsAI product that you want to use.
3. Select **Create New** to create a new AnalyticsAI file, or **Select Existing** to select an existing AnalyticsAI file from the drop-down menu. Click **OK**.

The engagement is linked to the AnalyticsAI file and the Cloud pane displays.

Notes:

- You can unlink an engagement from an AnalyticsAI file by clicking **Unlink** on the ribbon.
- If you permanently delete a linked AnalyticsAI file from the Cloud Recycle Bin, attempting to open it in the associated engagement file will result in an "Invalid engagement" error. Unlink the engagement file to clear the error, then create a new AnalyticsAI file.

Upload trial balance data to AnalyticsAI

When you link an engagement to an AnalyticsAI file, you can upload the engagement's trial balance data to begin performing tests. Prior to the upload, ensure that each account in the trial balance is assigned a map or group number. Note that you cannot upload trial balance data from consolidated engagement files.

To upload trial balance data to AnalyticsAI:

1. On the ribbon, click **Cloud | Upload**.
2. In the prompt to upload the trial balance, click **Yes**.
3. If the mapping structure between the file and AnalyticsAI doesn't match, a prompt displays to provide an optional mapping file (.ini) to map the accounts. Click **Yes** to apply a mapping file, **No** to continue without a mapping file, or **Cancel** to abort the upload process.
4. If the upload will produce unassigned accounts, a prompt displays to confirm that you will need to manually map the accounts. Click **Yes** to continue.

The trial balance data is uploaded to AnalyticsAI. You can view the uploaded data from the Data page of the Cloud pane and map any unmapped accounts by clicking **Assign Accounts**.

Generate test results in AnalyticsAI

AnalyticsAI automatically generates a default set of test results which you can refine as required using a variety of different tests and configuration settings.

- To upload transactions to AnalyticsAI, see Import the client's transactions from a CSV or Excel file.
- To generate test results, see AnalyticsAI test results.
- To refine the test results, see AnalyticsAI configuration.

When you've generated the required test results, you can download them as a report to incorporate into your engagement file. The report can be downloaded as a CSV, CSV ASCII or PDF file type.

To download test results as a report:

1. In the Cloud pane, click **Documents | 2-2 Risk Analysis (Transaction Risk)**.
2. The test results display. At the top-right corner of the Cloud pane, click the **Download** icon.
3. Select a file type for the report (CSV, CSV ASCII, PDF).
4. In the File Download dialog, click **Add** to download the report to the Document Manager.
5. The New Document Link dialog displays. Confirm the report settings and click **OK**.

The test results are downloaded as a report and added to your engagement file. You can move, modify or delete the report as required.

Integrate Working Papers with Queries

Queries is a collaboration tool that enables you to communicate and share documents with your clients in a single, secure environment. With Queries integration, you can easily manage the workflow of an engagement with automatic status tracking, drag and drop documents between Queries and Working Papers and align client queries with the engagement's status. Note that Queries may have a different product name in your region (e.g. PBC Requests).

Prerequisites:

- Your organization must be using Working Papers 2019 or later.
- Your organization must have a license for the Queries app. If you do not have a license, contact your local distributor for more information.
- Working Papers must be integrated with a Cloud site.

Recommendations:

- Store your engagement files on Cloud by publishing them to a Cloud entity. Published files are accessible from any location where you can log in to your Cloud account and can be immediately linked to a Queries file.

Integrate an engagement file with a Cloud entity

In Cloud, each client's data — such as engagement properties, address and contact information — is stored in their own entity. When you create a new engagement file in Working Papers, you can integrate it with the applicable entity to automatically populate the file with information stored on Cloud. To utilize the Queries app in your engagement file, you must complete this entity integration process (unless you've already published the file to Cloud).

To integrate an engagement file with a Cloud entity:

1. In Working Papers, open the engagement file that you want to integrate with a Cloud entity.
2. On the ribbon, click **Engagement | Engagement Properties**.

3. On the Name/Address tab, click the **Cloud Entity** field. Enter the name of the entity or click the drop-down menu and select **New** to create a new entity.
4. Client data from the Cloud entity populates the engagement's properties automatically. Click **OK**.

The engagement file is integrated with the Cloud entity. If you need to modify the engagement properties, select **Automatically sync engagement properties with the Cloud Entity** and make your changes in either the dialog or the Cloud entity.

Link the engagement to a Queries file

After integrating your engagement file, you'll need to link it to a new or existing Queries file before sending queries to your clients. You can create the link from the Queries Setup dialog that displays automatically after integrating an engagement with an entity. If you close this dialog, you can access it again from the ribbon.

To link to an Queries file:

1. On the ribbon, click **Cloud**. In the Queries group, click **Open**.
2. The Queries Setup dialog displays. If applicable, select the Queries product that you want to use.
3. Select **Create New** to create a new Queries file, or **Select Existing** to select an existing Queries file from the drop-down menu. Click **OK**.

The engagement is linked to the Queries file and the Cloud pane displays. Note that new Queries files include default content. We suggest that you complete the Optimizer document to add or remove content based on the nature of your engagement.

Notes:

- You can unlink an engagement from a Queries file by clicking **Unlink** on the ribbon.
- If you permanently delete a linked Queries file from the Cloud Recycle Bin, attempting to open it in the associated engagement file will result in an "Invalid engagement" error. Unlink the engagement file to clear the error, then create a new Queries file.

Create a query

A query is an interactive smart document that consists of the following components:

- **Questions:** The requests to which the client must respond.
- **Question sets:** Groups of related questions.
- **Response types:** The method in which the client submits their response.
- **Instructions:** Guidance on how the client can respond to the query.

Create a query in your Queries file to request information from your client.

To create a query:

1. In the Queries file, navigate to the **Documents** page. Click **Add | Query**.
2. Select a query type from the available templates and enter a name for the query.
3. Click **Create Query**.

A new query is created in the Queries file. You can also share documents with your client by adding them to the query. Note that if you add an automatic document to a query, it is automatically converted to a PDF.

To add a document to a query:

1. In Working Papers, open the Queries file and navigate to the query where you want to add the document.
2. In the Document Manager, select the document that you want to add.
3. Drag the document from the Document Manager into the query.

The document is added to the query. When you're ready to send the request to your client, click **Send**. A notification is delivered to the client by email with a link to the query's details. The client can upload their own documents and comment on the query if required.

Complete a query

As the client responds to your queries, you can **Accept** or **Decline** their responses. Accepted documents can be dragged from a query directly into the Document Manager of Working

Papers. If you are a content author, you can use an Author ID to automate this process by directly linking the query document to a placeholder in the Document Manager.

To link a query document to the Document Manager:

1. In the Queries app, add an Author ID to the applicable document.
2. In Working Papers, create a placeholder document in the Document Manager.
3. Right-click the placeholder and select **Properties**.
4. In the Document Properties dialog, click the **Template** tab.
5. In the Queries Author ID field, enter the corresponding Author ID from the Queries file. Click **OK**.

The query document is linked to the placeholder. When you receive an update to the document in the query, you can transfer that update to the placeholder by clicking **Cloud | Receive** on the Working Papers ribbon.

After you've accepted all the query responses, you can complete the query by clicking **Complete** at the top of the Cloud pane. Completed queries will automatically progress the status of engagement tracker in Cloud.