



OnPoint PCR

Overview

OnPoint PCR is built on the CaseWare Cloud platform which offers strong competitive advantages to firms, from centralizing client communications to securing your data. Beyond providing the foundation for OnPoint PCR, the cloud platform offers three distinct elements to help drive efficiency, quality and value for firms: collaboration, security and additional cloud applications to drive an end-to-end, comprehensive solution.



Collaboration

Working through CaseWare Cloud, firms gain several competitive advantages related to collaboration:

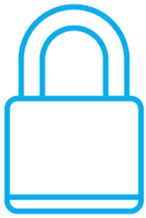
- Real-time dashboards to provide transparency for team members
- A single source of data that eliminates the need to check files in or out – everyone can work together with complete control over document versioning
- Online chat and secure discussions to facilitate team and client communications
- Standardized templates to ensure a consistent approach across the firm
- Tools to facilitate centralized communications with clients around document requests

Capitalize on Cloud collaboration capabilities

Facilitate collective, cooperative processes with a centralized database and client portal.

The screenshot displays the OnPoint PCR interface for a client named XYZ Limited. The interface is organized into several sections:

- General:** Includes fields for Type, Country, Workflow, and Entity number (1008).
- Profile:** Shows Status (Active), Year End Month (May), and Client Since (02/03/2010).
- History:** Displays Client Since (02/03/2010).
- Phone:** Lists Business (212-899-6327) and Business Fax (212-899-6354).
- Contacts:** Features a list of contacts, including Divya Patel with a 'Can Sign In' button.
- Addresses:** Shows Business and Home addresses, including 270 Park Avenue, Suite 8900, New York, NY, USA, 10017.
- Discussions:** Displays a list of discussions, including one about 'October large payment'.
- File Requests:** Shows a table of file requests with columns for Subject, Created, Status, and Due.



Security

Choosing a cloud service provider can be a complex task given the nature of today's security concerns. The number of potential threats - both malicious and benign - and the ever-increasing number of attack vectors can cause even security experts to feel overwhelmed. A robust cloud platform, such as CaseWare Cloud, needs to be secure and protect you from these potential threats. Cybersecurity is a critical mandate for firms of all sizes, and CaseWare has taken significant steps to ensure that CaseWare Cloud conforms to industry standards.

To help provide a holistic approach toward ensuring cybersecurity at your firm, CaseWare has captured 7 basic criteria to assess the strength of any cloud-based platform so that you can make the most informed decision about choosing a cloud service provider.

- Physical Security
- Application Security
- Network Security
- Data Security and Privacy
- Access Controls (logical)
- Availability
- Business Partnership and Trust

For details on how to navigate these seven criteria, visit <https://www.caseware.com/solutions/cloud/security>.

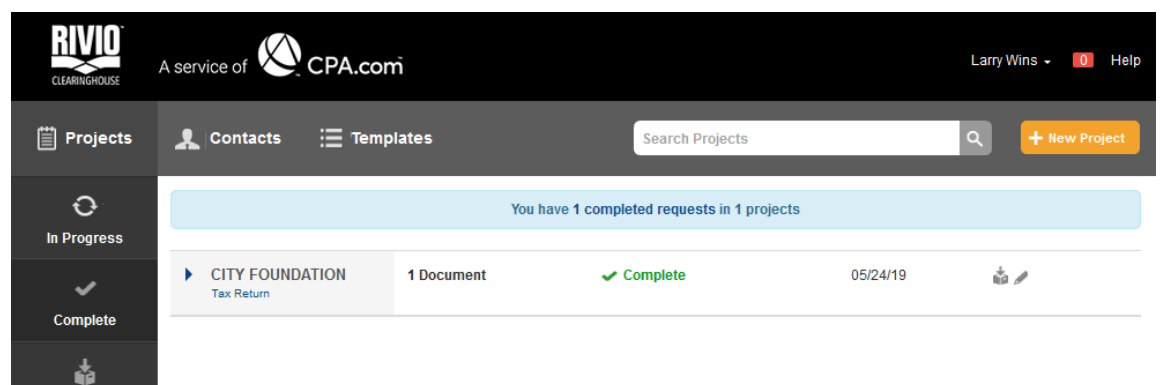


Additional Cloud Applications

Beyond OnPoint PCR, three key cloud applications can help firms with an end-to-end comprehensive solution to their engagements:

RIVIO Clearinghouse

CPA.com, in collaboration with Confirmation, have developed RIVIO Clearinghouse to enable firms to standardize and control their report issuance process. This process also authenticates the firm as a licensed CPA firm qualified to issue such reports, providing both clients and third-party consumers of financial information with peace of mind around the source of the information.

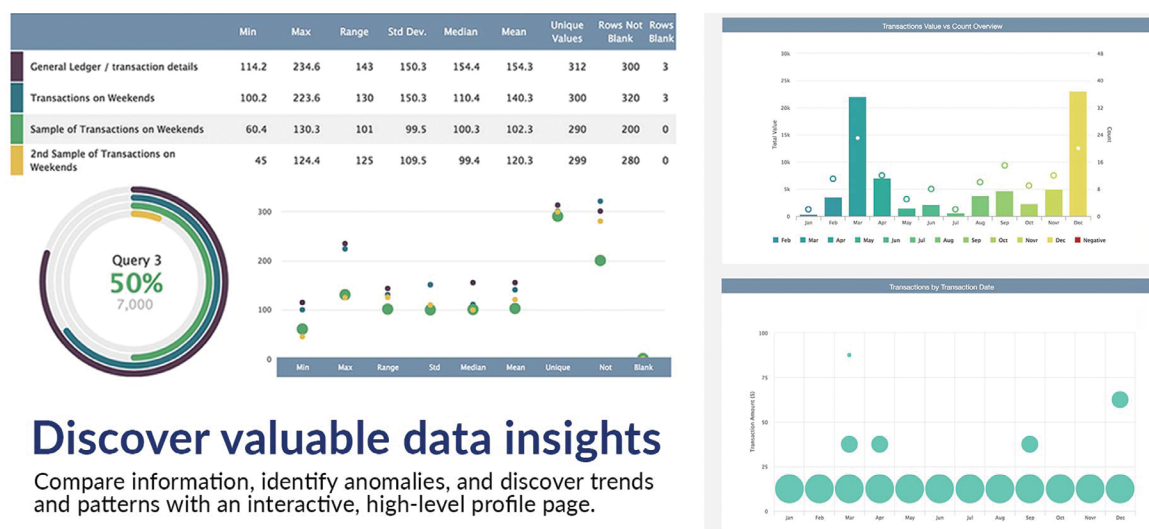


CaseWare Collaborate

Already integrated with OnPoint PCR, the Collaborate app can be used as a standalone product. This means you can facilitate any project that involves gathering documentation from clients, keeping the communication channels clear and centralized through the process. The Collaborate app also integrates with CaseWare Working Papers and other desktop engagement products.

CaseWare Analytics.ai

Analytics.AI is a risk-based transaction analysis tool that auditors can use to scan large transaction sets and find exceptions that might warrant further investigation, and to help plan their audit by indicating areas of higher risk.



Regarding AI

In the current digital business environment, data is continuously collected from various sources. In addition, the information collected involves multiple variables that determine the authenticity of the data. However, conventional auditing processes cannot keep up with this volume of data. For auditors, analyzing this data through regular spreadsheets gets even more challenging since there is always a probability of missing critical anomalies. Auditors across the globe are enhancing their skills by moving towards analytics that support efficient audits.

With Analytics.AI, auditors are empowered to quickly scan large sets of transactions data and find exceptions that might warrant further follow-up. The tool swiftly analyzes transactions by performing multiple routine tests on the whole transaction set automatically. Auditors can quickly investigate abnormalities and take actions to determine risk. This results in the following benefits:

- 100% data analysis
- Accurate risk-based analysis / Better identification of material misstatement risks
- Faster investigation of irregularities within data
- Improved audit quality
- Evidence on-demand