iFirm Document Manager Administration Quick Guide

Introduction

These are key tips on administering your Business Fitness content using CCH Document Manager.

Full details are in the 'CCH Document Manager Administrator Guides' found at http://dm-help.cchifirm.com/guides.

Accessing the Administration Module

Use the Administration module in CCH Document Manager to download, customise, add, and manage Business Fitness content for your firm.

To access the Administration module:

- In Outlook, on the CCH toolbar click on **Tools**
- Select **Administration** and enter your password

Share the Password:
Make sure that at least one other person in your firm knows the password so they can manage content if you're absent.

What is the Administration Module?

The Administration module displays the 'back end' of your CCH Document Manager software. It allows you to customise and manage your content and CCH Document Manager settings.

It shows a folder tree on the left side that mirrors the categories and sub-categories that the rest of your team see in the 'front end' user module of CCH Document Manager.

From 'Templates' down are folders that only the administrator can see - these are detailed below.

Folder	Details
Templates	▪ Business templates used to merge reports and letters into (branded with your firm's details) ▪ Document templates used to create procedures and tools
Document Type	A quick way to find what you need to customise (as it lists all procedures and tools according to Document Type)
Status	▪ Published - all items which are 'live' and viewable from the front end ▪ Draft - items your firm has set to draft so they won't be used by your team until they are Published ▪ Deleted - items deleted by your firm Take care not to permanently delete items from here (as sometimes you may need to reinstate an item of content later) ▪ Expired - usually items such as news articles that won't be relevant after a particular date
No Status Assigned	If an item of content is an orphan (i.e. no category or sub-category assigned) it will be located here.
Invoicing & Email	Functions you may use if they are enabled for your firm.

Key Task - Managing Content Updates

Each time we release a content update you will receive the Working Smarter newsletter from Business Fitness. This:

- Alerts you to the new update to download (pull down)
- Lists what procedures have been updated
- Links to the support FAQs online which:
  - Links to the Content Update Log
  - Links to the Master List of Content

If you miss downloading a content update, the next time you do so, the software will download everything since you last downloaded an update - this means that you can't miss an update.

When done regularly, downloading content takes 5-10 minutes.

Key Steps for Managing Content Updates

Step	Action
1	**To download** content, in the Administration module, click on **Content** menu. Click on **Upload / Download Content Updates** (or on the toolbar). When complete, the dialog box will disappear. The updated files sit in your server until you review and apply the updates.
2	**To review** content updates, click **Content**, then **Review and Apply Content Updates** (or on the toolbar). You can accept or reject our newly created documents, our updates and/or our deletions.
3	**If you have customised content**, you may need to meet with your content leader to determine: whether to keep your version; use our version; make your changes to our new version; or make our changes to your customised version.
4	To change an **Action** for an item, click on the down arrow. If changing from Draft to Publish, ensure you remove the protect tick from the original document first.
5	When you have finished reviewing, click **Update**. Note that items that showed: ▪ **Send to Draft** will be in your Draft folder so you can review them before publishing ▪ **Publish** will be in the relevant sub-category and your team will be able to use them ▪ **Delete** will be in the Delete folder - you can reinstate them from here if needed later

iFirm Document Manager Administration Quick Guide

Customising Business Fitness Content

You can customise content to change document details and the actual text. In the Administration module, go to the relevant sub-category, select the item and **double-click** to display the **Document Properties** for that content.

Step	Action
1	Click on the **Details** tab. Here you can change things such as the Name, Description, Keywords, Document Type (Letters, Procedures, etc).
2	Click on the **Section(s)** tab. Here you can assign: ▪ A procedure to a **Role** ▪ An item to another **Sub-Category** (this references the same item from multiple sources)
3	Click on the **Edit Document** button to open the document. Make your text edits then save and close the document.
4	Click on the **Notes** tab. Here you can record changes so when we release updates you can easily see what you need to review and potentially change. Alternatively you can use a spreadsheet. **The important point is to record your changes.**
5	Click **Save & Close**

After editing a document, you will see the following in the **Document Properties** / **Details** tab:

- **Protect** ✓ - leave this ticked as it prevents future content updates from overwriting your customisations
- **Author** - will be set as you
- **History** - a record of the changes (you can use this later to go back to a previous version if needed - see page 4)

Creating New Content (Letter, Procedure, etc)

Step	Action
1	Click on the sub-category on the left side.
2	Right-click in the right side panel and select **New Document**. The New Document window displays defaulting to the **Create New** option.
3	▪ Select the type of document (e.g. Word) ▪ Enter the **Name** and **Description** (take a look at our procedures to guide you if needed) ▪ Add any **Keywords** that are not in the name or description that will help your team find it ▪ Tick **Expires** and enter an expiry date if relevant
4	▪ Select the document **Type** (e.g. Procedures) ▪ In the **Categories** field check the document is assigned to the correct category (it will default to the sub-category you started from) ▪ Assign to a **Role** (if relevant) ▪ Enter **Invoicing** details (if relevant)
5	▪ When entries are complete, click **Finish** ▪ The empty document with relevant template applied opens for you to start working in ▪ Ensure you update the footer
6	Go to **Document Properties** to set the document to **Draft** or **Published**.

Adding Hyperlinks to Procedures

Where relevant in a procedure step, you can add a hyperlink to a tool.

To insert a link in a procedure step, enter the Document Type (e.g. Policy), highlight it and insert the encrypted CCH Document Manager link. For:

- **Word 2007**, click on Word's **Insert** tab, then click on the **Link Document** icon in **CCH Document Manager Merge Fields**
- **Word 2003**, use see the **Link Document** icon on your **CCH Document Manager Merge Fields** toolbar

To insert a web tool link, type **Web**, highlight it, and click (or Ctrl + K) and enter details as normal.

Creating Content from Existing Content

Creating new content from existing Business Fitness content is almost the same as creating new content (see the left side of this page). The key difference is that after you select the sub-category and right-click in the right side panel, you select **Link To** instead of New Document.

To browse to the document you want to link to, click on ... next to the **File Name** field. Locate the document and click **Open**. Complete entries as you would for new content in steps 3-6.

Setting Up a Letter Template

To create a new letter template follow steps 1-3 as you would for new content (on the left side of this page), but you don't need a Description or Keywords. Type is **Other** and you cannot select a sub-category as it defaults to Template. Click **Finish**.

A blank document opens for you to set up letter template:

- Insert a logo in the header (or leave space for pre-printed stationery)
- Add a date - it's a good idea to use a Replace Field here

Use the **CCH Document Manager Merge Fields** menu to add:

- **Client Information** (links from your firm's practice management software)
- **Standard Text Mark** which is where your body text will go (see below) - this is **mandatory** for the document to work correctly
- Your firm sign off

Creating Body Text for a Letter

Create a new document (see the steps for creating new content on the left side of this page) with the Type being **Letters**. The address block, salutation and sign off will 'pull through' from your letter template, so all you need to do is set up the body text. To do this:

- Insert ¶ Body Start from CCH Document Manager Merge Fields toolbar
- Type the letter text and insert ¶ Body End
- Add any replace fields by placing [square] brackets around the words
- To activate, click Replace Fields then click **Cancel**
- Save and close the document

iFirm Document Manager Administration Quick Guide

Creating a Document

The following demonstrates how the content, template and client details come together in practice in the front end.

Step	Action
1	Locate the piece of content (e.g. letter) via the procedure or use the Search Text field.
2	Right-click on the item and click **Create Document**.
3	Select the **client**.
4	Select the **template**. You can select an Outlook reminder if you want.
5	Click **OK**.
6	A new document opens, pulling through the client details, styling from the templates, together with body text from the document. From here you can enter details into the Replace Fields and edit the text as needed.
7	Click on the **Save Into** button on the CCH Document Manager toolbar to go to the client's current folder.
8	**Name** the letter and click **Save**.

Adding a Category (or Sub-Category)

Categories are the groupings of content you can see down the folder tree on the left-hand side in the CCH Document Manager Administration module.

(Steps to add a category or sub-category are the same.)

Step	Action
1	Click on the category you want the new category to fall under.
2	Right-click and select **New Category**.
3	Enter the **Title**.
4	Tick or untick the **Document Types for Display**.
5	Click **Save & Close**.

Edit, Move or Delete a Category (or Sub-Category)

Select the category (or sub-category) and:

To	Action
Edit	Right-click and select **Properties**.
Move	Use the blue arrows on your menu to move the category up / down or left / right.
Delete	Right-click and select **Delete Category**. **Note:** You cannot delete a category if it contains content (you'll need to delete or move the content first).

Setting Up a New Team Member

Click on **Teams** then **Team Members** (or the icon).

To add a team member:

1. Click on the icon and enter the **user name**
2. In the **Logon Details** tab, enter the **windows logon**
3. Save & Close

These are the only details you must add to set up a team member. You can enter the rest of the details when it suits or when details are known (e.g. phone, email, reports to).

To change or add details:
Select the team member, update relevant details, then Save & Close.

Setting Up or Editing Document Types

Click on **Content** / **Document Types** and

- Click on the New Item icon or,
- Edit the details of an existing document type, then assign a default template
- Save & Close

Setting Up Global Applications

You can set up shortcuts to applications (e.g. Microsoft Word, PowerPoint) that your entire team can use.
To do this, your team need to be using the same version (e.g. either Office 2003 or 2007).

Step	Action
1	Click on **Tools** then **Setup Global Applications**
2	Click on the New Application icon
3	Click ... (browse) next to the **Application** field.
4	Find and select the programme (which will be an **.exe** file) in your **Programme Files** Click **Open**.
5	Back in the CCH Document Manager New Application window, enter the **Title** and click **OK**. Team members will now see this in the front end in the **Applications** folder.

iFirm Document Manager Administration Quick Guide

Setting Up Your News Page

You can use this for work and team related items (e.g. New Clients This Month, Social Club).

To add items, select your **News** page category, right-click and select **New Document**, then make your entries.

You can add:

- Documents (e.g. Word or Excel) as you would to any other category (see page 2)
- For items that don't have an attached document, (e.g. a quick news item) select **Create New** - **Simple Document**
- **Expiry Date**

If required, to enable editing of a file by your team, go to **Document Properties** and untick **Read Only**.

Setting Up Your Knowledge Base

It's important for you to have your firm's Knowledge Base set up in CCH Document Manager Document Manager because: it's a central location for your firm's resources; you save on storage and paper; your team can use the CCH Document Manager Search functionality to find what they're after; you can include all your newsletters, articles, etc.

Your Knowledge Base (or Firm Library) is generally setup on your main CCH Document Manager Document Manager menu.

Using Bulk Import

If you have a lot of items to add to a category (maybe newsletters to add to your Knowledge Base), you can use the bulk import function.

Step	Action
1	Click on **File** then **Import**.
2	Click … to browse to the directory you want to link to and click **OK**.
3	▪ Publisher - your firm name ▪ Author - you ▪ Document Type - e.g. Newsletters ▪ Status - defaults to Draft
4	Category - click … to browse for a category. If it doesn't exist you can create it at this point using the **New Category** button.
5	Click **Import Documents**.

Weblinks

Step	Action
1	Click on the **Weblinks** category.
2	Right-click and click **Link To**.
3	Paste or type in the URL of the site to link to (e.g. www.ird.govt.nz).
5	Click **Finish**.

Reporting

Usage Report is the main page you see when you log into the Administration module. This lists who's using content the most and what documents are being used the most.

Click on the **+** next to the document to expand it and see who used it and when. Change the following parameters if needed: how many documents to display, period to display, and tick or untick 'display statistics for all users'.

For other reports available, click on **Reports** and select the relevant report. You can change available parameters. (Document Usage Summary is similar to Usage Report.)

Commonly Used Options

To access, click on **Tools** / **Options**.

The following are some key options in the **General** tab:

- **Default Startup Page** is generally set to News
- **Display 'New' graphic...** determines how long the NEW graphic displays (indicating in the front end that a document is new)
- Turn on and off **Global Applications**

For details of other Options available, go to the 'CCH Document Manager Administration Guide'.

Replace Document

This is what you use to overwrite a piece of content. You may want to replace a document:

- Because you download the updated version regularly (e.g. the Business Fitness Content Update Log), or
- To restore to an earlier version, or
- To use your in-house version

To replace a document:

- Find the document, select it and click **Open**
- Either click **Move Document** (recommended) or Copy Document
- Click **OK**

In the message box 'do you want to replace', click **Yes**

Note: Take care to replace the document with the correct document!

Reverting Back to a Previous Document

If needed, you can revert back to an earlier version:

- Go to **Document Properties** / **History**
- Double-click on the version you want
- Save it to your desktop
- Use the **Replace Document** / **Move Document** function

For Help with Using:

- CCH Document Manager, go to the 'CCH Document Manager Administrator Guide' http://dm-help.cchifirm.com/guides or email ifirmsupport@cch.co.nz

- CCH Business Fitness content, email support@businessfitness.co.nz or phone 0800 10 58 60

iFirm Document Manager Administration Quick Guide

ADVANCED FUNCTIONALITY

Reporting

Usage Report is the main page you see when you log into the Administration module. This lists who's using content the most and what documents are being used the most.

You can click on the **+** next to the document to expand it and see who used it and when. You can change the following parameters for this report: how many documents to display, period to display, and select or deselect 'display statistics for all users'.

For other reports available, click on **Reports** and select the relevant report. You can change available parameters. (Document Usage Summary is similar to Usage Report.)

Using Email Notifier - Content Updates

This is useful when broadcasting content updates or in-house changes to your team. To use:

- Click **Tools** / **Options**, then **Email Notifier**
- You can see when you last used this tool
- You can select the date range for changes you want to show and change the **Email Subject** and detailed **Message**
- To see the changes that the email will list, click **Preview**
- Notice that the emailed list is organised into categories and sub-categories
- Click on the **Recipients** tab to see who will be sent the email
- From here you can select or deselect recipients (for your team members to show, an email address must be set up for that team member - click on to access)
- Click **Send Email** when ready

Creating and Managing Content - Best Practice

- If possible, create tools before creating the procedure (then you can link tools to relevant steps of the procedure as you go)
- Change file names before importing
- Name documents logically (pre-fix them with the subject area, such as ACC, GST, etc)
- Add your firm logo into the header of your document templates - this makes your firm content obvious
- Create new document templates (e.g. presentations)
- Team members with relevant skills can create content (the administrator just needs to import them)

Ease of Use - Best Practice

- Communicate with your team and work out what content they need or where they may be having problems
- Follow up technical issues as soon as possible and get back to your team
- Make sure the User Guide is in your Knowledge Base
- Use your News page and get your team involved
- Get your team involved in training

Maintaining Content - Best Practice

- Review in-house procedures regularly
- Encourage suggestions from your team and manage / review suggestions (see the Business Fitness procedure for this)
- Send content suggestion changes to us - we love getting your input and it may well be relevant to others
- Hold regular content meetings with your content leader
- Have a segment in team meetings to let your team know about key changes
- Keep an eye on usage reports - recognise and reward

Customising Content - Best Practice

- Utilise the notes page on the Document Properties
- You can save a temporary copy then use Replace Document when it's complete (rather than Draft)
- Add your firm name or acronym into keywords
- Add your firm logo to the header
- Hold regular meetings with your content leader following a content update to review your customised content
- To use your own document, use Replace Document to overwrite it and make sure it's protected - this way you'll get an alert when it's updated
- Don't delete it and put in a new one or the system will continue to update your deleted Business Fitness version

Updating Content - Best Practice

- Check out and question draft content
- Let your team know about changes
- Update your Content Update Log and Master List
- Tell your team about special updates and add information from Best Practice newsletters to News page
- Add Content Update and Best Practice newsletters to your Knowledge Base

General Shortcuts

- Right-click does just about everything
- To replace fields type square brackets [word] then click Replace Fields
- Don't put punctuation in replace fields, document name, description or keywords
- F5 is refresh
- Drag and drop to rearrange
- Use up / down arrows to reorder documents / categories
- Use the Document Type area to quickly find tools

Assigning a Procedure to a Role / Team Member

Right-click on a procedure to assign the document to a role or team member. We recommend you do this each time you review a procedure.

iFirm Document Manager Administration Quick Guide

Changing or Setting Up a Role

Changing or setting up a role is the same as setting up any sub-category. Right-click on the **Roles/Team** category:

- **To change**, right-click on the role and select **Properties**, make your changes, then Save & Close
- **To add**, select **New Role**, make your entries, including the Document Types you want viewable from the front (you can select all), then Save & Close

You also can set up a role for an area that someone looks after, such as IT.

Setting Up In-Out Board Reasons

You can set up predefined reasons for your team to use.

- Click on **Teams** then **In-Out Board Reasons**
- Click on the new item icon . In the **Predefined Reason** field enter the reason, complete the **Details** field, then Save & Close

Additional Document Properties

Additional Document Properties you may use are as follows (see the 'New Administrator Key Tips' for others):

- **Invoicing** tab - to record your invoicing text, default amount, and whether the document's enabled to Create Invoice, if your firm's using the Create Invoice functionality
- **Usage** tab - shows who has used the document and when (or you can display who hasn't used the document)

Setting Up Replace Fields

You can enter replace fields defaults that will be used by your team (e.g. the full / correct firm name). This is a great way to make sure your team members use the correct details. (These will be defaults in the front end, not compulsory, so they can be overwritten if needed.)

- Click **Tools** / **Options**, then **Replace Fields**
- Click on the add field default icon
- Click in **Field Name** field and enter the default field
- Click in the **Default Value** field and enter details
- Save & Close

Using the Settings Tab

Click **Tools** / **Options**, then **Settings**. From here you can:

- Control how things display when you use your Contacts or Clients window
- Turn on and off the companies and tax office options.

Using the Additional Information Tab

This is where you can set up information fields for your Contacts option. Your firm may want to do this to start to gather information (perhaps for future marketing).

- Click **Tools** / **Options**, then **Additional Information**
- Click on the add user defined field icon
- Enter the **Description** (e.g. Last Event Attended)
- Select the **Type** of entry allowed from the drop-down list
- Save & Close

Using Document Tracking

This enables your team members to have their documents reviewed and approved before they are sent out.

To set up document tracking statuses:

- Click **Tools** / **Options**, then **Document Tracking**
- Click in the **Status** field and enter the status default (e.g. For Review, For Rework, Approved, Complete)
- Set your default status (e.g. For Review)
- Save & Close

To enable or disable document tracking:

- Click **Tools** / **Options**, then **General**
- Select **Enable Document Tracking**

To manage what displays in the tracking window:

- Go to **Tools**, click on **Document Tracking Management**
- From here you can delete the tracking for completed items and you can clear out this file periodically
- As with the front end, you can see which statuses have been changed in the History for each document

For Help with Using:

- CCH Document Manager, go to the 'CCH Document Manager Administrator Guide' http://dm-help.cchifirm.com/guides or email ifirmsupport@cch.co.nz
- CCH Business Fitness content, email support@businessfitness.co.nz or phone 0800 10 58 60