# Transitioning from a Document Management System
## Quick Reference Guide

## Document Management has the power to transform your practice into a cloud-based digital office.

FYI's Document Management software is purpose-built for accountants, with a unique blend of collaboration tools and a powerful automation engine we aim to halve the time you spend on managing your documents.

✓ **Key differences between document management systems and FYI**

✓ **New ways to work with documents**

✓ **Tips when locating and working with documents**

✓ **Best practice filing structure for consistent document filing**

Manage your documents without the guess work and admin time. FYI offers an intuitive way for you to work with documents, with greater control, consistency and visibility.

Enabling practices to use the power of metadata to slice and dice their information in ways that are meaningful to them, in seconds.

Beyond this it also allows for full document integrity and version control, automated email filing and digital document approvals.



### FYI was born in the cloud with enterprise-grade security
Your documents are protected with the highest level of security and can be accessed safely from anywhere.



### Flexible, consistent filing
Flexible job, client and group-based filing making documents easy to file and manage. With powerful filtering for instant access and visibility to critical client information.

Accountants spend 60% of their time managing documents and client communication. FYI gives you time back, automating and streamlining the way you work:

▶ Automatically file emails, signed documents and more
▶ Instantly access the latest version of documents, from anywhere
▶ Reduce compliance risk with consistent filing and visibility
▶ Collaborate easily with your team on documents
▶ Spend less time searching, more time on client work

# FYI reimagines document management, enhancing productivity with accessibility and automation

## Improve how you work as a team with a consistent, cloud-based system that makes filing, finding, and collaborating faster and easier.

Making the move from your current document management system to FYI unlocks streamlined workflows, secure access from anywhere, and fewer manual steps. Below is a side-by-side comparison to help you understand how the new way supports your team.

| Document Management System "Old Way" | Document Management with FYI "New Way" |
|---|---|
| **Finding clients using code**, being the unique identifier these can be hard to remember and use | **Find clients using name, group, or code**, whatever is easiest for your team |
| **Filing to jobs requires creating extra categories**, adding complexity and inconsistency to filing | **Built-in job-based filing**, no setup needed, making it quick, dynamic and consistent |
| **Documents are stored in on-premise server**, often making it difficult to access when not in the office | **Secure, cloud-based storage**, so you can access documents and information from anywhere, anytime. |
| **Drag and drop or cut/paste files,** which can lead to misplaced or duplicated documents | **Controlled filing updates** (individually or in bulk) keep documents organised and secure |
| **No built-in workflows** for sharing or approving documents | **Built-in workflows** make it easy to send docs for approval before going to clients |
| **Collaboration often in external applications**, losing context and audit trail information | **Built-in productivity tools** allowing you to collaborate via comments or tasks with visibility and context |
| **Limited integrations available**, typically integrating with practice management from the same software provider can cause disconnected workflows | **Open API connecting with industry leading applications**, providing seamless workflows reducing rekeying and duplication of effort for the team |

> FYI has been a huge boon for our practice...we are able to work from home thanks to your software.
>
> ALISTAIR SCANLON,
> PARTNER
> SCANLON RICHARDSON ACCOUNTING

> FYI as a standalone product is incredibly strong. And because it is more cabinet and tag based rather than a nested structure, it becomes a lot easier to find, discover and search for documents.
>
> BARRY TANG
> BUSINESS MANAGER
> COUNT NORTH SYDNEY

# Working smarter in FYI

## Adopting a new document management platform is a chance to refine how your team works.

Below are some helpful insights and best practices to make the most of your move to FYI and start working in a smarter, more efficient way.

### Locate Documents

FYI provides flexible, filterable list views that can be customised and saved for quick access to information.

**1** Use **columns** and **filters** to quickly sort, search, and find what you need.

**2** Use **Custom Views** to easily navigate to grouped documents that are meaningful to you. Note: Custom Views can be created by users with permissions.

**3** Use the **group-based view** to search across entire client groups — no need to remember which entity something was filed under.

### Tips & Tricks

**1** **Cabinet Explorer**, available on the left-hand side of the screen, allows you to select a cabinet and then explore via year allowing you to quickly and easily change the years to search for documents.

**2** If you are having trouble locating a document in FYI and know where it was in your historical document system, document **Reference** numbers are retained in FYI, you can locate those documents easily searching by reference number.

**3** If documents need further refinement after your onboarding migration, use the Bulk Update function to refile to the correct cabinet and categories quickly.

**For more on working with documents, check out our best practice guide.**
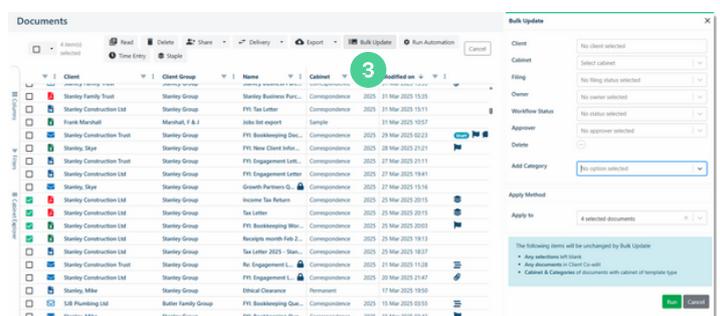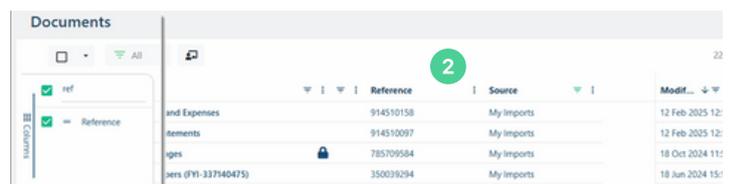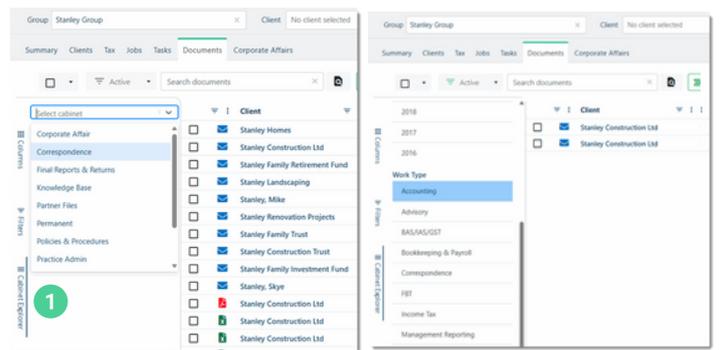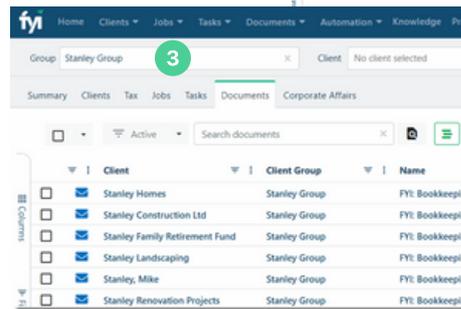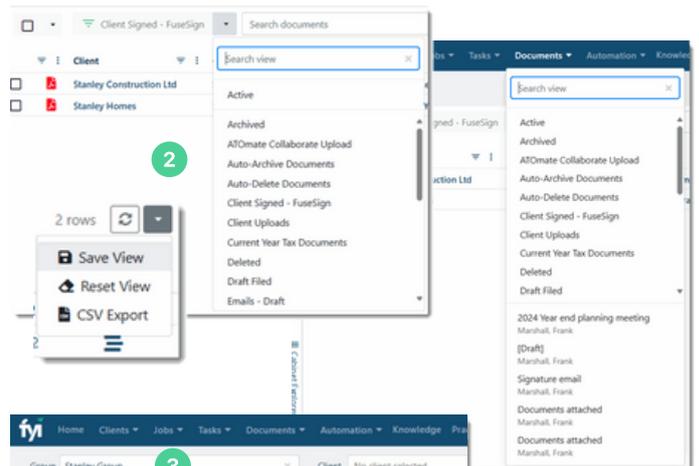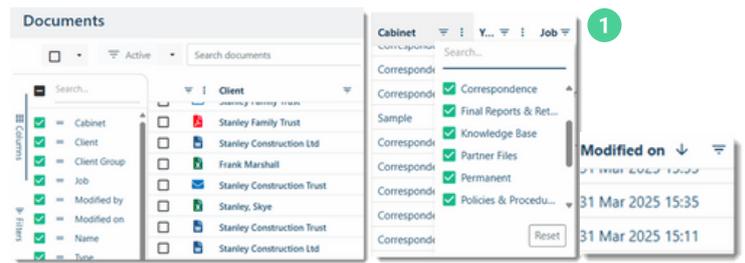
## Best Practice Filing

The following outlines FYI's best practice filing structure for documents, these are available by default in FYI.
Note: This structure is customisable and may not reflect your final filing configurations.

### Cabinets

The below are FYI's best practice cabinets and categories. The categories highlighted are mandatory.
Note: These cabinets and categories are available by default and may not reflect your final filing configurations.

| Cabinet Name | Category 1 | Category 2 | Category 3 | Cabinet Type | User Group Security |
|---|---|---|---|---|---|
| Corporate Affairs | Year | | Jobs | Client | Standard Users |
| Correspondence | Year | Work Type | Jobs | Client | Standard Users |
| Final Reports & Returns | Year | Work Type | Jobs | Client | Standard Users |
| Partner Files | Year | | Jobs | Client | Admin Users |
| Permanent | Year | | | Client | Standard Users |
| Workpapers | Year | Work Type | Jobs | Client | Standard Users |
| Policies & Procedures | Year | | | Knowledge | Standard Users |
| Practice Admin | Year | Practice Admin Type | | Knowledge | Admin Users |
| Training | Team | | | Knowledge | Standard Users |

For more information on Cabinets, Categories and Options when filing documents in FYI check out our **helpful resource**.

**To learn more about FYI, visit fyi.app. For more information on getting started with FYI, visit the FYI Help Centre.**

# Best Practice Filing cont.

The following outlines FYI's best practice filing structure for documents, these are available by default in FYI.
Note: This structure is customisable and may not reflect your final filing configurations.

## Categories

The below are FYI's best practice categories and options.
Note: These categories and options are available by default and may not reflect your final filing configurations.

### Category: Year

| Option 1 | Option 2 | Option 3 | Option 4 | Option 5 | Option 6 | Option 7 | Option 8 | Option 9 |
|----------|----------|----------|----------|----------|----------|----------|----------|-----------|
| 2025 | 2024 | 2023 | 2022 | 2021 | 2020 | 2019 | 2018 | Permanent |

### Category: Work Type

| Option 1 | Option 2 | Option 3 | Option 4 | Option 5 | Option 6 | Option 7 | Option 8 |
|----------|----------|----------|----------|----------|----------|----------|----------|
| Accounting & Tax | Advisory | Audit | BAS/IAS/GST | Bookkeeping & Payroll | Cashflow & Budgeting | Management Reporting | Tax Planning |

### Category: Practice Admin

| Option 1 | Option 2 | Option 3 | Option 4 | Option 5 | Option 6 |
|----------|----------|----------|----------|----------|----------|
| Internal Accounting | IT | Legal | Marketing | Planning | People & Performance |

### Category: Team

| Option 1 | Option 2 | Option 3 | Option 4 | Option 5 |
|----------|----------|----------|----------|----------|
| Administration | Audit | Business Advisory | Taxation | Superannuation |

For more on best practice filing, including naming conventions, check out our
**best practice resource**.

**To learn more about FYI, visit fyi.app. For more information on getting started with FYI, visit the FYI Help Centre.**

## Best Practice Filing cont.

Below is an example of FYI's best practice filing structure for documents shown in the Drawer.



**DOCUMENT TYPE**
Indicates the document type selected.

**DOCUMENT NAME**
This identifies the document internally and is the name that displays in document lists in FYI.

**CLIENT**
The Client record the document is filed to, this is a mandatory field. You can change the Client by typing over the existing client and selecting the new Client.

**CABINET**
The Cabinet the document is filed to, this is a mandatory field. When the Client and Cabinet have been selected, further defaults and options display.

**CATEGORIES**
The filing Category/Categories for the document. The Category options that are available are filtered according to the Cabinet selected. Some Categories may be mandatory and must be completed to file the document.

**OPTIONS**
Within each category is a list of options i.e. the values that a user can select from. The Category selected controls the Options that can be selected and the order in which these display in the drawer.

**1 Job Filing**
When a document is created or filed to a Cabinet that has **Jobs** enabled, the Jobs field is included as an additional filing category in the filing section in the Drawer. This displays all jobs for the selected client. By default, inactive jobs are not included in the selections. You can show these by clicking Show inactive jobs in the drawer.

**2 Tags and Keywords**
If the selected Cabinet has been enabled for this feature, you can create or select Tags and/or enter one or more Keywords to use as additional categorisation, to use when searching for the document.

For more on using the Document Drawer, check out our **Help Centre**.

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