Transitioning from Folder Based

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 and folder based systems**

- ✅ **New ways to work with documents**

- ✅ **Tips when locating and working with documents**

- ✅ **Best practice filing structure for consistent document filing**

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.

Store documents consistently
FYI filing cabinets ensure documents are filed uniformly across the team. With powerful filtering for instant access and visibility to critical client information.

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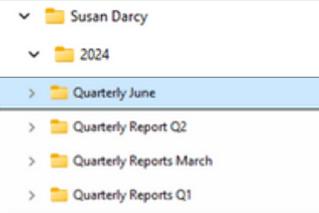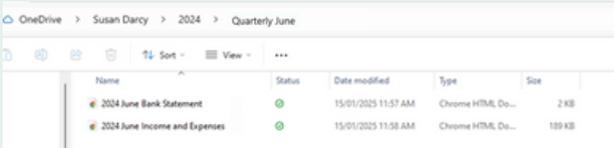
Accountants spend 60% of their time managing documents and client communication. FYI gives you time back, automating and streamlining the way you work:

- ▶ 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

Document management is a system used to capture, track and store electronic documents

Improve how you work as a team with documents - filing, finding, and collaborating efficiently and effectively.

While FYI will look a little different from traditional folder systems, the change brings smoother workflows, better access, and fewer manual steps. Below is a side-by-side comparison to help you understand how the new way supports your team.

Folder Based System "Old Way"	Document Management with FYI "New Way"
Finding documents means drilling into folders (Client > Year > Work Type > Document)	**Find everything in one place** using powerful filters and search at both the Client and Group level
Everyone builds their own folder structure, which often ends up inconsistent or messy	**A consistent firm-wide structure** using Cabinets and Categories to keep everything in order
Filing rules depend on the user, and can easily go off-track	**Standardised categories** make filing simple and aligned across the team
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
A document is stored in just one folder based on a single filing rule	**Documents can be tagged multiple ways** so they're easier to locate later
Emails need to be saved manually into folders	**Seamless email capture** with Office add-ins that file emails and attachments automatically
Need to create new folders for every Job (e.g., BAS Dec 2024)	**Job-based filing is built-in,** with no need for extra folders
Documents live on desktops or internal servers and may be hard to access remotely	**Cloud-based access from anywhere,** on any device, at any time
No built-in workflows for sharing or approving documents	**Built-in workflows** make it easy to send docs for approval before going to clients
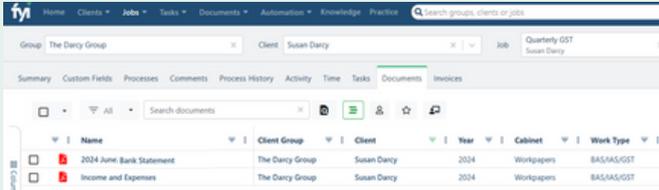
Working smarter in FYI

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 replaces the traditional folder-based drill-down with a flexible, filterable list view.

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. This can feel similar to folder based filing and help you with the transition to FYI.

2 If you are having trouble locating a document in FYI and know where it was in your historical document system, **Source & Source Path** columns retain the filing path of the historical system so you can locate those documents easily.

3 If documents need further refinement after your onboarding migration, use the **Bulk Update** function to refile to the correct cabinet and categories quickly.
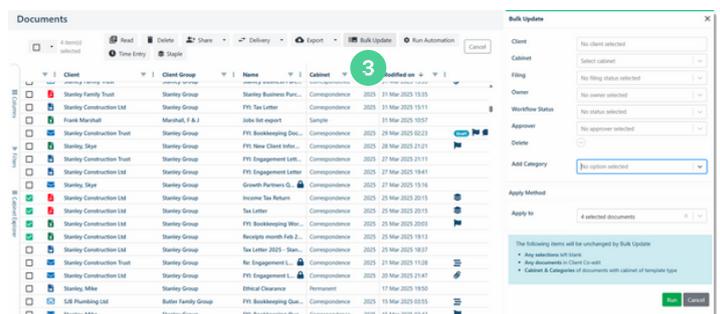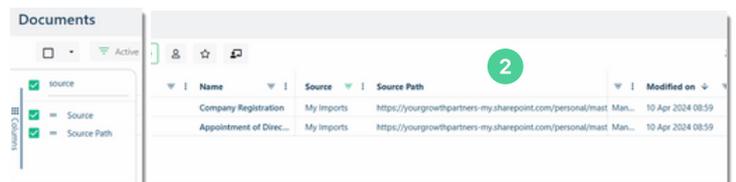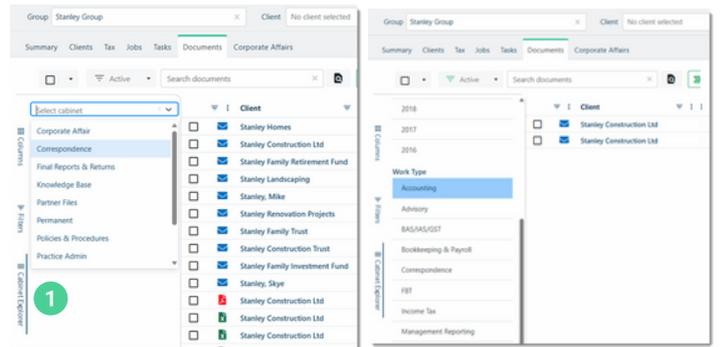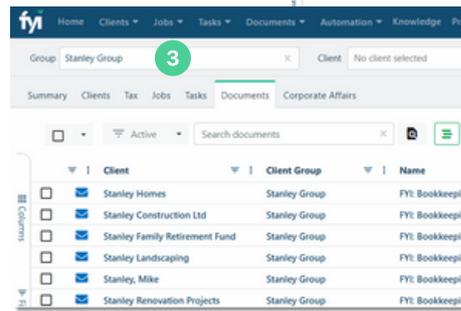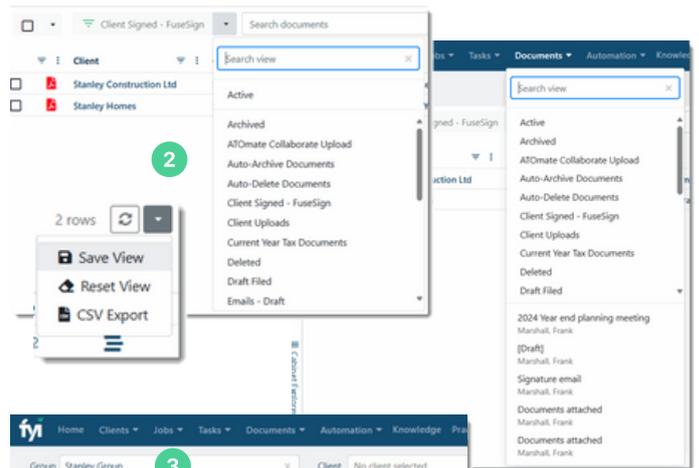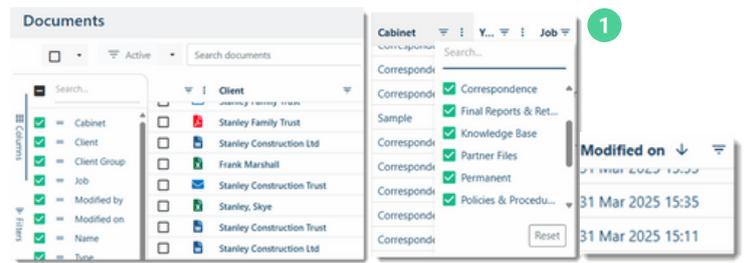
For more on working with documents, check out our [best practice guide](#).

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.
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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.

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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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