

Working with Documents

Best Practice Guide



Be more productive when working with documents

Save time creating, editing and reviewing documents. Plus, productivity tools that will take your document management to the next level.

- ✓ **Creating Documents**
- ✓ **Preview, Read or Edit Documents**
- ✓ **Closing the Loop**
- ✓ **Stapling & Linking Actions**
- ✓ **Version Control & Activity**
- ✓ **Importing Documents**
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- ✓ **Tips & Tricks for Quick Access to Documents**

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Creating Documents

Save time creating documents in FYI by:

Using Hot Keys

Hot Keys quickly display the relevant document drawer for you to create your document. If you ever forget the hot key, they're listed next to the document type in the Create New menu (+).

Using Templates

In the Create Document drawer, you have the option to select a Template from a list of your Practice's active templates. This populates the body of your document, includes any merge fields with the relevant data for the client as well displaying the suggested filing defaults for the document.

Alternatively, you can create documents from the Knowledge workspace by selecting the Template you'd like to use and clicking +Create.

Starting in the Client Workspace

If you navigate to the client workspace first and then create a document, FYI will prepopulate the client details for filing.

Copying an Existing Document

You can use the Copy function in the document action tool bar to duplicate existing documents, so you don't have to start from scratch.

Tip: if you're copying a document, it might be worth considering if a Templates should be created in the Knowledge workspace.

Note: The Copy function cannot be used on emails.

[Learn more about creating documents](#)

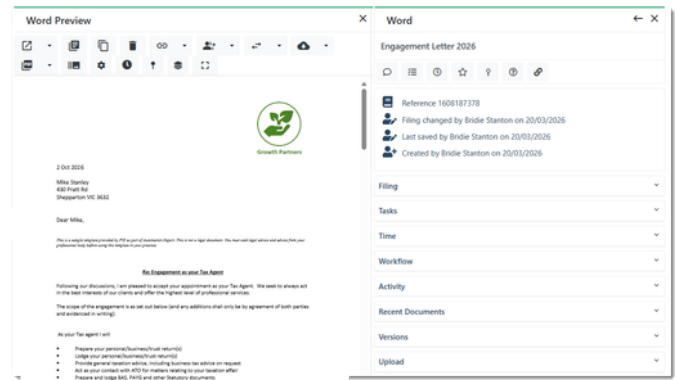
Preview, Read & Edit

These actions allow you to interact with documents in FYI, depending on the level of interaction you need will depend on the action you choose.

Preview

Need to preview a document for quick overview?

Use the Preview pane in the document Drawer, better yet go full screen for maximum efficiency when reviewing the document direct in FYI.

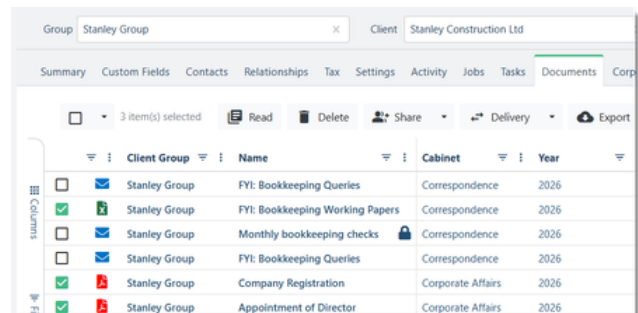


Read

Need to view several documents?

Using Read you can open multiple documents for review in bulk.

Each document opens into their own tab in your browser for review. Simply select the documents, then click 'Read' in your document action toolbar to launch the documents.

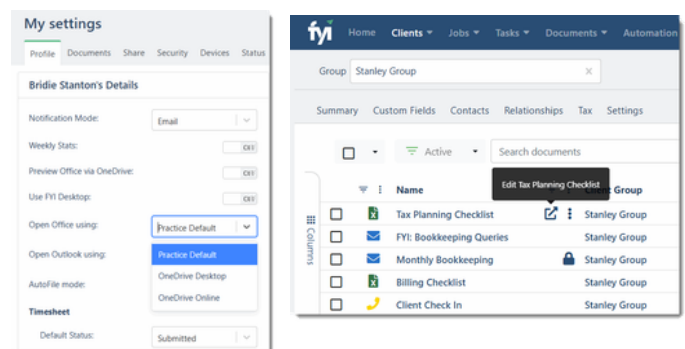


Edit

Need to make changes to a document?

Choose your preferred method for opening office documents in My Settings.

Then when you next select the 'Edit' icon and the document will launch in your preferred method for quick and easy editing.



Closing the Loop

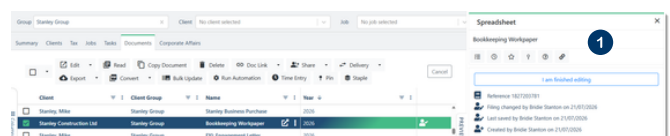
When you have finished editing a document, it's crucial to close the loop so your changes are synced back to FYI and the team can access the most recent version. This ensures no work is lost and document versions are maintained.

1 Do it as you go

Use the FYI Add In for Office to check the document back in.

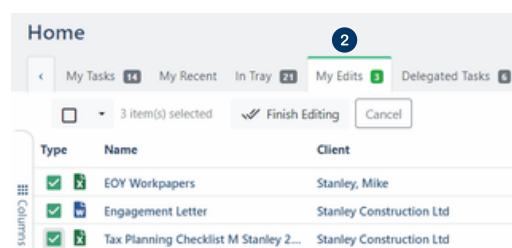
Make sure the document is saved and then select 'I am finished editing' in the FYI drawer. Then simply close the Office application.

Or once you save and close the document select 'I am finished editing' in the document drawer inside of FYI.



2 Do it at the end of the day

Go to My Edits in your Home Workspace to 'Finish Editing' all documents before you log out of FYI at the end of your day. As simple as two clicks.



[Learn more about previewing, opening and editing documents](#)

Stapling & Linking

Sharing documents with the team has never been easier thanks to FYI's Stapling & Linking functions.

Stapling

Staple documents to create a quick view and share the stapled view with team. This is great for grouping source documents, workpapers or collation packs.

- 1 Select the required documents and click Staple in the Document toolbar.
- 2 Click the Staple icon alongside one of the stapled documents to display a view.
- 3 You can share the stapled document view by selecting 'Staple' under the Doc Link option in your action toolbar.

Paste this link into a collation Task for instance, this will take your teammate direct to the stapled view, so they know exactly which documents need to be sent.

Linking

You can link documents to one another using the Doc Link function.

This is handy inside an Excel workpaper, where you can directly link to supporting source documents. This is done from the FYI drawer in Office.

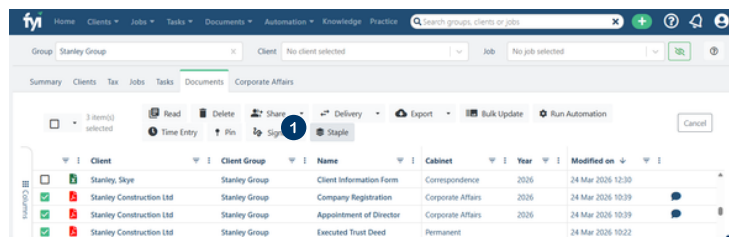
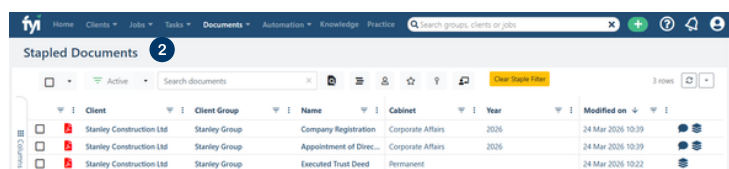
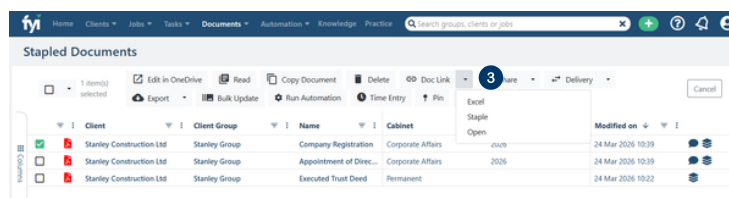
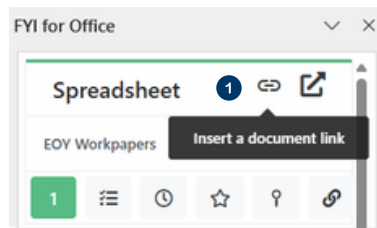
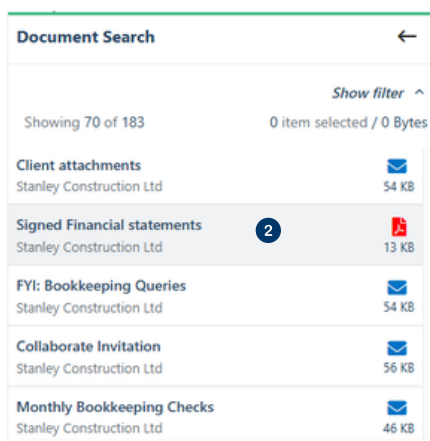
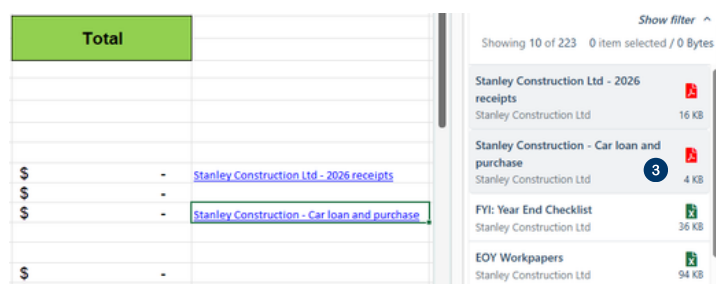
- 1 Simply highlight the cell you want to insert the link to, select the Insert a document link from the FYI drawer.
- 2 This will display the Document Search drawer for you to select your cabinets and categories and locate the relevant documents.

Once located simply click the document to insert a link.

- 3 The other benefit to using this function is the Link is always to the current version of the document, so there's no need to come back into Excel to update your links!

FYI handles this through Version control automatically.

[Learn more about using document actions](#)



Version Control & Activity

FYI maintains full version control of all Word, Excel and PowerPoint documents. Whenever one of these document types is edited, a new version is created in the document drawer.

This gives you full visibility to all versions and allows you to read and/or restore earlier versions of the document if needed.

1 Versions

Open the Versions section in the Document drawer and select the ellipses next to the Version you'd like to view (Read) or restore (Set as current).

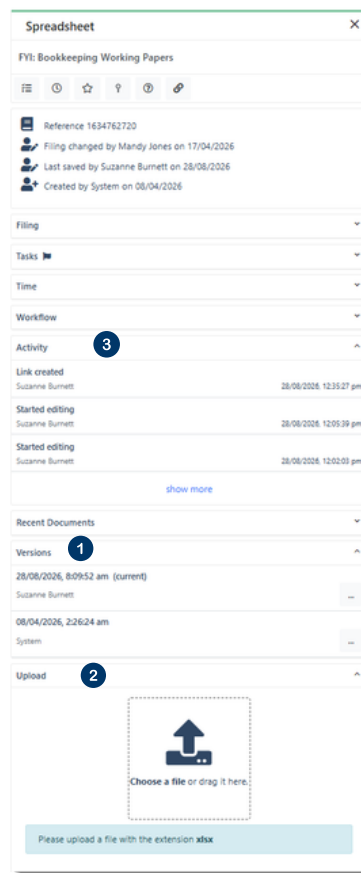
2 Upload

You also have the flexibility to Upload a new Version of the document within the drawer. This means you don't need to save a duplicate of the document within FYI.

Simply drag and drop the document into the Upload section of the drawer to create the new and current Version of the document within FYI.

3 Activity

FYI also maintains a full audit trail on documents so you can always see what's happened across the life of a document in FYI. To do so simply navigate to the Activity section of the drawer.



Importing Documents

There are a few key ways to import documents into FYI. The method you choose will be dependent on the nature of upload.

Drag & Drop

This is the easiest method to import, simply navigate to the Documents list in your Clients workspace and drag and drop your documents into the list.

The Import drawer will display for you to file the documents.

Note: Only 10 documents can be uploaded at a time.

Upload

Use the hotkey 'U' or select Upload from the Create New menu to open the Import drawer.

From here you can either drag and drop your files or click the highlighted section to locate the documents in File Explorer.

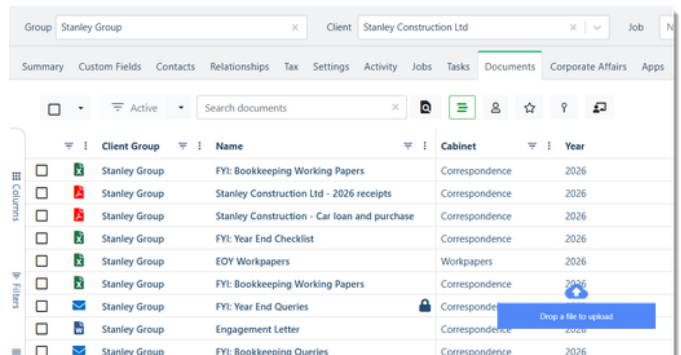
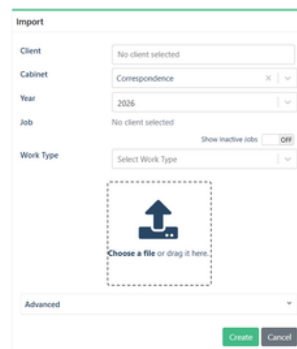
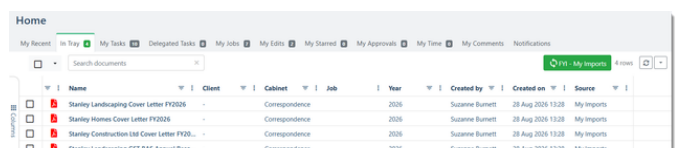
Note: Only 10 documents can be uploaded at a time.

FYI - My Imports

If you have more than 10 documents, or large document types that need to be uploaded, FYI - My Imports folder is the recommended option.

Simply save the documents to your FYI - My Imports Folder in OneDrive then navigate to In Tray in your Home Workspace.

Select the FYI - My Imports sync button and FYI will retrieve the documents from your folder and upload into your In Tray for filing.



[Learn more about working with documents](#)

Collating, Editing and Redacting PDFs

Work with PDFs directly in FYI to create polished, client-ready documents. Combine multiple PDFs into one organised file, then edit without needing to leave FYI.

Collate

Need to combine PDFs into one document?

Create a single, organised PDF from multiple documents while keeping the original files unchanged.

- 1 Select the PDFs you want to combine and click Collate PDFs.
- 2 Arrange the documents in the order you need.
- 3 Review the filing details and click Create.

Edit

These tools allow you to review and make changes to PDFs directly in FYI. Choose **View**, **Annotate**, **Shapes**, **Redact**, **Edit** or **Page** to navigate, mark up or update the document.

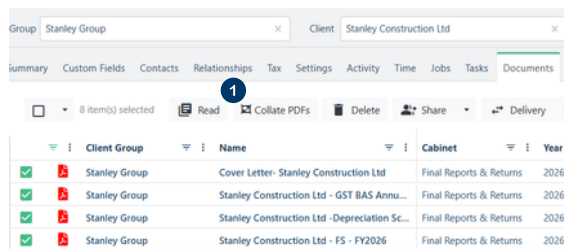
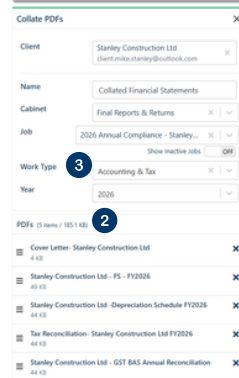
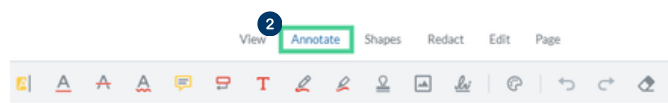
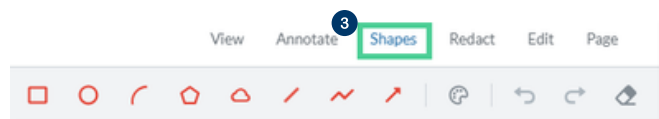
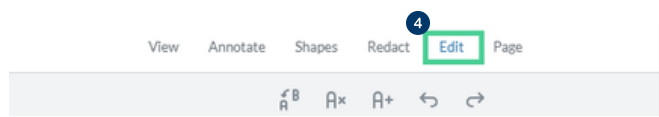
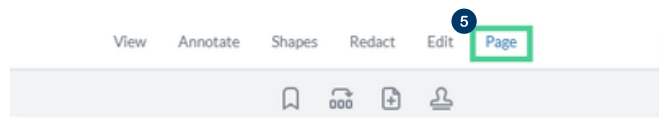
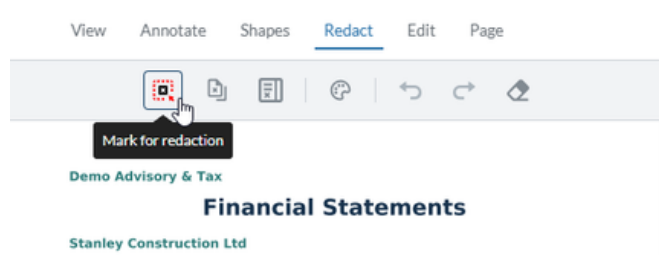
- 1 **View**
Use View to read, search and navigate through the document. Zoom in and out, move between pages and use the side panel to quickly locate the information you need.
- 2 **Annotate**
Use Annotate to review and mark up a PDF without changing the original document content. These tools are useful when reviewing information, identifying areas that need attention, or communicating feedback to others.
- 3 **Shapes**
Use Shapes to visually draw attention to specific information. You can add elements such as rectangles and arrows to highlight figures, sections, or other areas that require attention.
- 4 **Edit**
Edit provides tools for changing the content and structure of a PDF directly in FYI. This makes Edit useful when preparing, reorganising, or finalising a PDF before it is shared or progressed through a workflow.
- 5 **Page**
Use Page to manage the structure and presentation of the PDF. These tools are useful when organising or preparing a PDF before it is finalised or progressed through your workflow.

Redact

Redaction is used to permanently remove sensitive or confidential information from a PDF. Users can select individual pieces of text or search within larger documents to help locate information that needs to be removed. When more substantial content needs to be removed, entire pages can also be redacted.

Note: Once a redaction has been applied, it will permanently remove the selected content from the PDF. This action can't be undone.

[Learn more about editing and redacting PDFs](#)



Tips & Tricks

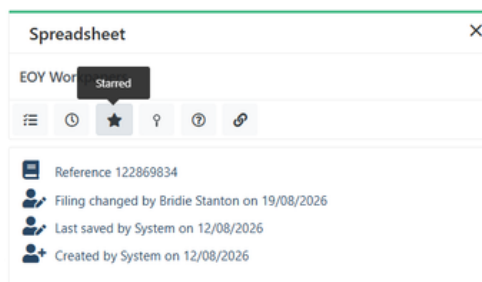
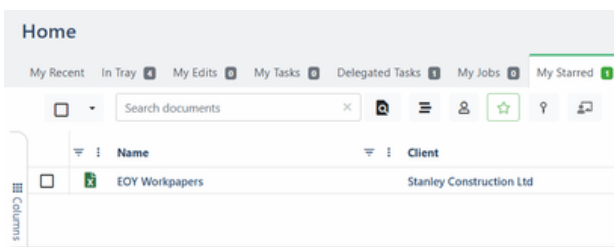
Access documents you need quickly with these handy tips.

Starred Documents

Are there documents you go back to time and again?

Use the 'Star' function in FYI to favourite those documents for quick access.

Simply select the document and click the 'Star' in the document drawer, this will place the document in your Home workspace under My Starred for quick access in future.



My Recent

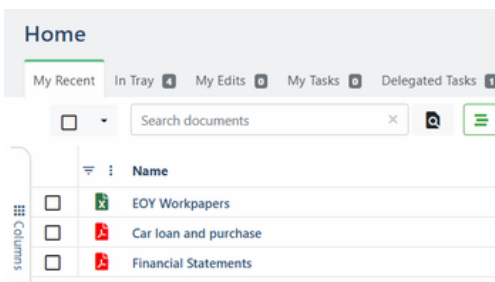
Worked on something recently you need to go back to?

You can navigate back to any documents you have recently worked using your My Recent tab in your Home Workspace.

Alternatively, you can access recent documents from the Document menu option in the main menu.

Select the drop-down next to Documents and scroll down to find your most recently accessed documents.

To be taken directly to a preview of that document, simply click the document in the list from the drop down menu.

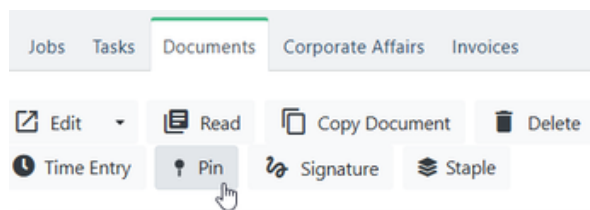


Pinned Documents

Are there documents you want to pin for a client?

Use the 'Pinned Documents' function to access important documents quickly.

Simply select the document and click the 'Pin' in the toolbar. To display pinned documents, select the 'Display pinned documents' to filter only pinned documents.



Store your documents in the cloud and unlock time-saving benefits when creating, editing, reviewing and collaborating on documents with your team.

For more information on Documents, visit the FYI Help Centre at support.fyi.app