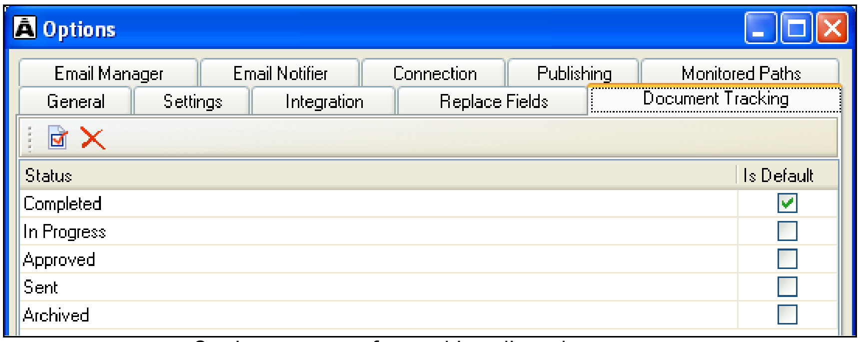
Acclipse Document Manager — Document tracking

Your firm can use document tracking to gain more control over documents that pass between you and clients. Once you set up document tracking, anyone in your firm can track a client document and change its status. This involves creating a list of states to represent your firm's workflow process. The team member then selects the appropriate state whenever they save the document into a client folder. You can keep track of the status of any document saved in a client folder (including Word documents, Excel spreadsheets, and emails).

Set up document tracking

To set up document tracking:

1. Log into the Admin module.
2. Select *Tools* → ***Options***.
3. Select the ***Document Tracking*** tab.
4. Click the *Add document tracking status* icon.
5. Enter a description for the first state of a client document in the field provided.
6. Add as many states as required.
7. Tick one of the states to set it as the default.
8. Select the ***General*** tab.
9. Tick ***Enable document tracking***.
10. Click ***Save & Close***.



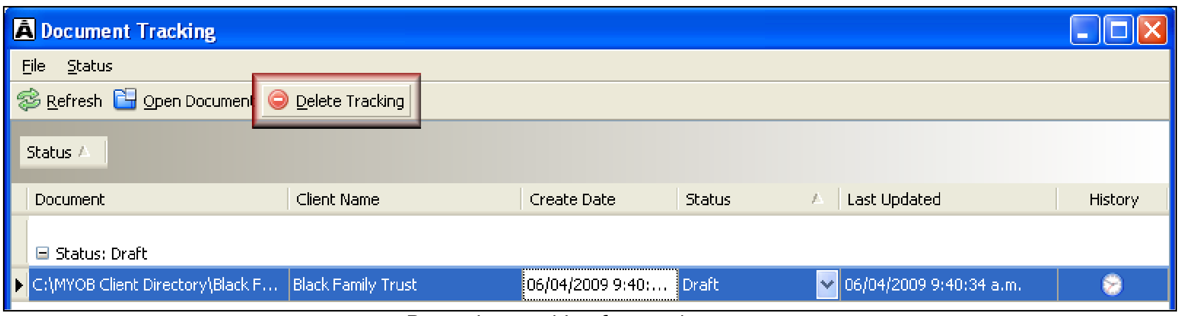
Setting up states for tracking client documents

Remove tracking from a document

If required you can delete a document that has been set up for tracking. To do so:

1. Open the User module.
2. Select *Tools* → ***Document Tracking Management***.
3. Select the row of the document you no longer wish to track.
4. Click ***Delete Tracking***.

NOTE: You can also use this area to open documents and change their tracking status.



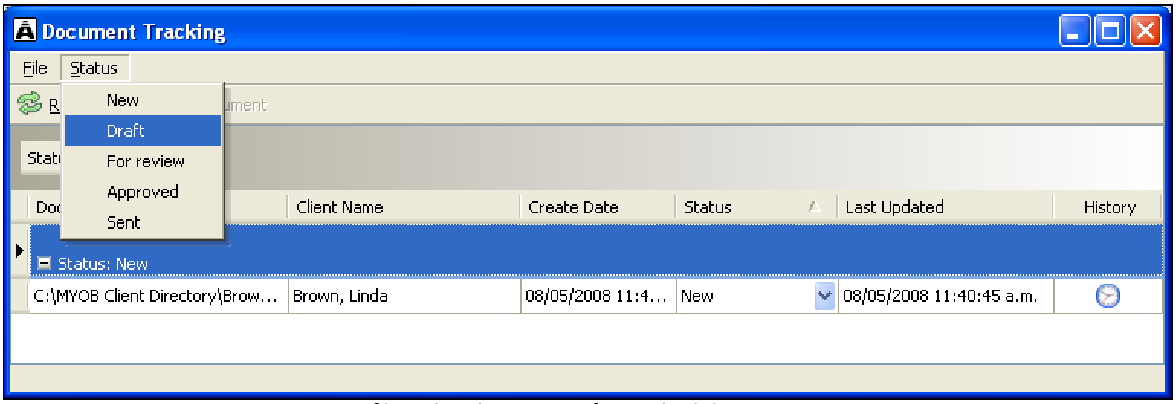
Removing tracking from a document

Track document

To track a document:

1. Open the required document.
2. Click ***Save Into*** on the *Acclipse* toolbar.
3. Select a client on the *Select Client …* window.
4. Click ***OK***.
5. Select a client folder on the *Save As* window to save the document into.
6. Tick ***Track this document*** at the bottom of the window.
7. Click the arrow beside the *Status* field → Select the appropriate status.
8. Click ***Save***.
9. Click ***Tracking*** on the *Acclipse Document Manager* toolbar — The document you have tracked displays in the *Document Tracking* window.
10. Change the document status from here (if required) using EITHER of these methods:
    - Select ***Status*** → Select the required status.
    - Right-click the document → Select the required status.
11. Select ***Refresh*** to refresh the *Document Tracking* window and view any changes team members might just have made.
12. Click the *History* icon for the required tracked document to view a history of its status changes.
13. Open a document from the *Document Tracking* window (if required):
    a. Select the document.
    b. Click ***Open Document***.

NOTE: If a client document can no longer be tracked if it is renamed or deleted.



Changing the status of a tracked document