

Acclipse Document Manager: Administrator Training – Part Two

Course Objective

Acclipse Document Manager enables you to systemise your practice by providing easy access to client details, documents, and emails; it also provides you with a central, searchable database of company policies, procedures, checklists, and templates. This course is the second part of the Administration training and covers working with Categories, Documents and Document Templates, Tracking Documents, Team Member Management, Content and Reporting.

Course Duration

Allow 1 Hour

Categories

- Viewing Categories
- Adding a New Category
- Editing an Existing Category
- Changing the Display Order
- Password Access
- Hiding or Un-Hiding
- Deleting a Category
- Administrative Categories

Documents

- Document Types
- Adding a New Document Type
- Creating a Default Layout (Document Template)
- Editing an Existing Document Type
- Deleting a Document Type
- Re-ordering the Document Type List

Document Templates

- Adding a New Document Template
- Editing an Existing Document Template
- Assigning a Template to a Document Type
- Deleting a Template
- Changing the Template's Status to Deleted
- Permanently Deleting a Template

Managing Documents

- Editing a Document's Properties
- Editing a Document
- Opening a Document
- Deleting Documents
- Display Order
- Displaying Full Document Description
- Assigning Categories
- Adding a Document to Additional Categories
- Viewing Documents within a Category

Adding Documents

- Creating a New Document
- Copying across an Existing Document
- Linking to a Website
- Importing a Folder of Documents

Adding Merge Functionality to Documents

- Acclipse Document Manager Merge Fields Toolbar
- Inserting Client Fields from the Contact Database
- Inserting a Document Reference Number
- Inserting a Body Start and a Body End
- Linking Documents (Procedures)

Team Member Management

- Team Members
- Adding a Team Member
- Team Roles
- Team Member Documents
- In-Out Board Reasons

Merging documents

- Understanding the Create Document Process
- Understanding the Mail Merge Documents Process
- Customising your own Templates for Acclipse Document Management

Content

- Downloading Content Updates
- Processing Content Updates
- Viewing via Status and Document Types

Reporting

- Running Document Usage Reports
- Viewing Document Usage

Please Note: If you have Acclipse PDF Manager and/or Acclipse Email Manager these will also be covered in the training sessions.