practice track online
The Website Solution for Accountants

DOCmanager User Guide

INTRODUCTION

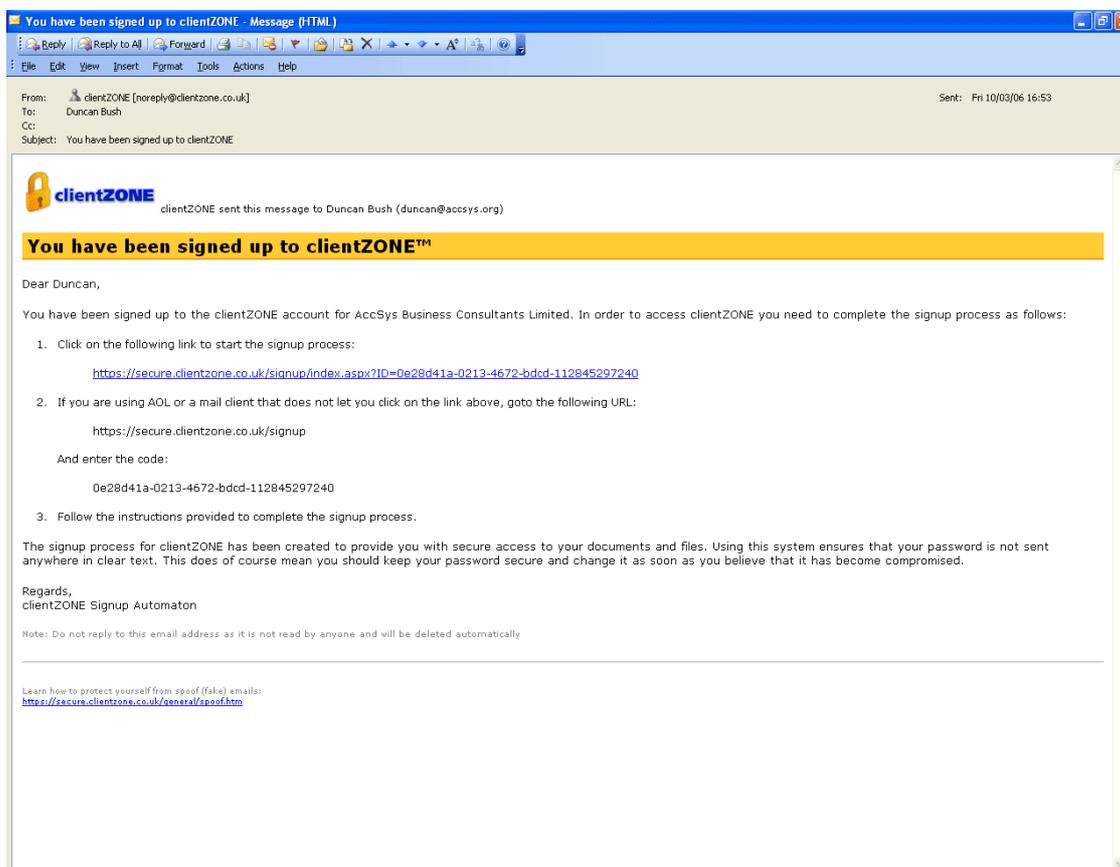This is a quick start guide to help you get started with using DOCmanager.

There is a comprehensive help system contained within the system and this can be accessed by clicking on the help buttons.

Please note that DOCmanager is a component part of our clientZONE system clientZONE provides the secure environment and the ability to administer companies and users. DOCmanager provides the ability to upload and manage documents.

If you have any questions or need any help then please don't hesitate to email support@practicetrackonline.co.uk

INITIALLY LOGGING INTO THE SYSTEM

When you are first registered for DOCmanager you will receive an email like the one below. Follow the instructions given to set-up your login and this will give you access to the system.


You have been signed up to clientZONE - Message (HTML)

File Edit View Insert Format Tools Actions Help

From: clientZONE [noreply@clientzone.co.uk]   Sent: Fri 10/03/06 16:53
To: Duncan Bush
Cc:
Subject: You have been signed up to clientZONE

clientZONE

clientZONE sent this message to Duncan Bush (duncan@accsys.org)

You have been signed up to clientZONE™

Dear Duncan,

You have been signed up to the clientZONE account for AccSys Business Consultants Limited. In order to access clientZONE you need to complete the signup process as follows:

1. Click on the following link to start the signup process:

   https://secure.clientzone.co.uk/signup/index.aspx?ID=0e28d41a-0213-4672-bdcd-112845297240

2. If you are using AOL or a mail client that does not let you click on the link above, goto the following URL:

   https://secure.clientzone.co.uk/signup

   And enter the code:

   0e28d41a-0213-4672-bdcd-112845297240

3. Follow the instructions provided to complete the signup process.

The signup process for clientZONE has been created to provide you with secure access to your documents and files. Using this system ensures that your password is not sent anywhere in clear text. This does of course mean you should keep your password secure and change it as soon as you believe that it has become compromised.

Regards,
clientZONE Signup Automaton

Note: Do not reply to this email address as it is not read by anyone and will be deleted automatically

Learn how to protect yourself from spoof (fake) emails:
https://secure.clientzone.co.uk/general/spoof.htm

This system has been designed to protect the security of your login and your users will go through a similar process when you set-up their accounts.
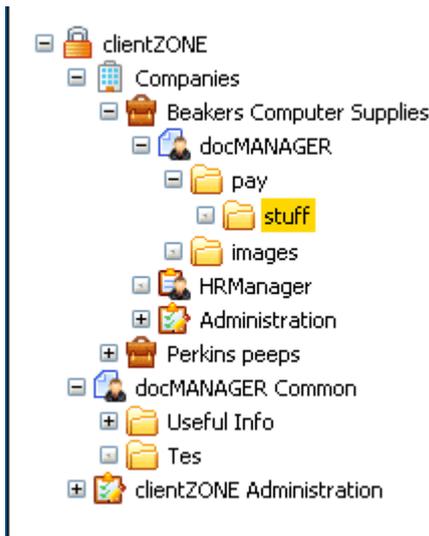
GENERAL NAVIGATION

The workspace is made up of 2 main panels, 2 toolbars and a banner.
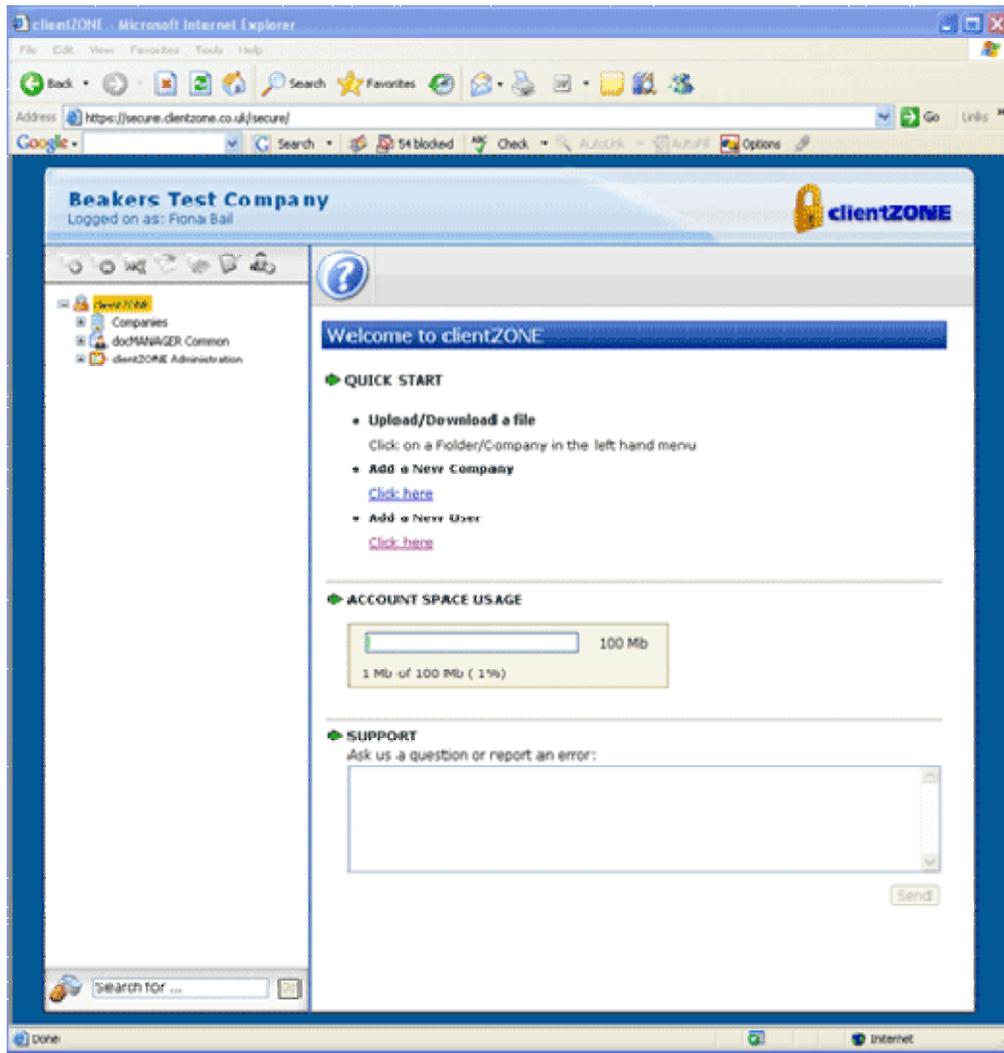
The Banner indicates the company clientZONE is registered to and the user who is logged on.
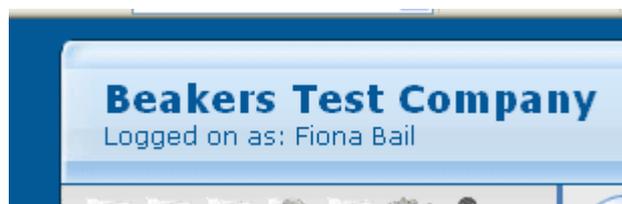
The Left-hand panel contains the menu tree, where all the administration and navigation takes place and at the bottom the search field which enable you to search for information.

The Right-hand panel contains information about where you are on the navigation tree.

	Name	File Size	Created On
☑	A D Broadbent web pages.doc	160 Kb	30 May 2006
☐	A+B.jpg	44 Kb	30 May 2006
☐	banner.psd	172 Kb	30 May 2006
☐	footer.psd	130 Kb	30 May 2006
☐	STANDING ORDER MANDATE.doc	32 Kb	30 May 2006
☐	Website Builder - amendments form.doc	47 Kb	30 May 2006

SETTING UP THE DEFAULT FOLDER STRUCTURE

This is the default folder structure that will be used in each company you create within the system. It is important to get this right when you start to give consistency and to avoid having to edit these later.

1. Click on the clientZONE Administration Node to expand the Menu

2. Expand the Companies Node

3. Click on the Folder Template Node, this will bring up the Company Folder Template page

4. When you access the Folder Template page you will have the default folder already selected and a new tree menu in the right hand panel which shows the folders that you have set up in the Default Template.

5. To add another folder to the Default Template:

    - Select the root of where you want the folder to go
    - Type in the name on the field to the right
    - Press Add Folder button

6. If you want to delete a folder from the Template select it and drag it to the trash can.

7. When you set-up a company you will be given the option as to which folder template you wish to use for that company.

Note: If you make a folder private then only administrators and staff can see that folder. Your clients will not be able to see it unless the default permissions of that user are changed.

Note: You can add individual folders by using the left hand menu – first of all make sure you've clicked on the company you want to add the new folder to.

SETTING UP ADMINISTRATORS AND
STAFF MEMBERS

There are different user groups set-up in clientZONE by default. These user groups allow for different permission rights for those users and they are summarised as follows:

Administrators: This user group has the highest level of access to both the Accountants own folders and the companyies they look after. They define and therefore have rights to upload/download and basically perform any operation in the domain of the firm they belong to. The can also administer any of the company's they have setup; including defining users and groups belonging to each company. The administrators can also define private folders within any company's folders which can be non-visible to the users belonging to the company.

Staff: This group has access in a similar scoping to the Administrators in they have access to storage areas belonging to the companies and are members of staff at the accountants. They have lesser rights than administrators and cannot administer the users and groups. Individual users of this group may be given special privileges if the appropriate permissions are assigned specifically to them bringing them closer to the administrators' access privileges.

Users: This group represents the members of staff belonging to a given company. The group is therefore repeated for each company administered by the accountancy firm. This group is the basic access group for each company and therefore very limited, generally Read Only access permissions are assigned to this group.

To set-up a staff member or administrator:

1. Click on the clientZONE administration node in the tree view to open it

2. Click on users/groups in the tree view

3. Click on user management in the tree view
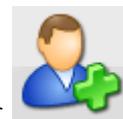
4. Click on the add new user button in the right hand toolbar

5. Fill in the necessary info and select your company from the company fiels

6. Click update

7. You will then be shown a section called user groups – in this section you can add the user to the necessary group (ie staff or administrators)

Edit An Existing User

Details

Email: duncan@accsys.org

First Name: Duncan

Last Name: Bush

Company: totalSOLUTION (demo 2) (This Account) ▼

[Update]

Reset user Password

If this user cannot access their account and has requested that you reset their password, click the button below to send them the Password Reset email. This will allow them to select a new password in a secure mannor.

[Reset Password]

User Groups

Select a group from the list below that this user will belong to:

totalSOLUTION (demo 2) - Users ▼ [Add To Group]

SETTING UP A COMPANY

What is a Company?
A company within clientZONE is generally one of your clients that may want to use the services within clientZONE such as DOCmanager. By setting up individual Companies, you can ensure that one of your customers can't see the rest of your customers, keeping confidential information away from prying eyes.

For example
clientZONE is registered to ABC Accountants who have 10 customers using clientZONE. Each of these customers will have their own separate Company from which they can use their services.

Adding a Company

1. Click on the clientZONE administration node in the tree menu

2. Click on the Companies Node

3. Click on the add company button on the right hand toolbar and you will be taken to the screen below

Create a New Company

Company Name: [   ]

Use Template Folders: [-- Do NOT create default folders -- ▾]

Company Categories
Select any of the categories that apply to this company for grouping and filtering.

Applications
Select the applications that this company will have access to.

[Create Company]

4. Enter the Company name of the new company you are creating, generally you can use your customer's name as only Administrators will be able to see the complete list of companies.

5. Select the Applications that you want this company to have. If you select docMANAGER you will get another option appear for Template Folders.

6. Click Create Company

This will forward you to the Company Administration page where you can edit the company you have just created or add a new company.

The new company will now be visible in the tree view under the companies node

SETTING UP USERS

What is a User?
This group represents the members of staff belonging to a given company. The group is therefore repeated for each company administered by the accountancy firm. This group is the basic access group for each company and therefore very limited, generally Read Only access permissions are assigned to this group.

To add a user to a company:

1. Click on the Companies Node

2. Click on the company that you want to add a user to

3. Select the Administration node within the selected company

4. Finally select User Management. As you can see the right hand toolbar now has the add a user icon enabled. Click on the icon and you will be forwarded to the "Create a User" page.

5. Complete the form and click update. This will send an email to the new user requesting them to sign up.

6. You will then be shown a section called user groups – in this section you can add the user to the necessary group (ie users)

UPLOADING FILES

1. Click on the folder in the left hand tree menu into which you want to upload the file

2. Click on the green upload file button in the right hand menu.

3. Browse to find the file you want to upload from your PC and add a description

4. If you wish to send an email to someone telling them that you've uploaded a file then click on "Show Message" and your will be shown some extra fields, complete these and click upload.

5. If you wish to upload more than 1 file at a time then click on add more files and you can upload as many as you like in a batch.

DOCmanager COMMON

In the tree menu there is a folder called DOCmanager common and within here is a folder called useful info. Documents you upload into this folder will be available to ANYONE who logs into the system. So if you have a resource which you'd like to share amongst your clients then upload it into this folder and they'll all be able to access it.