

Retiring Singleview

A discussion on migration considerations for practices moving from Singleview to CCH Document Manager



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About the author....

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Charles personally consulted, installed and implemented the majority of Singleview systems and is deeply familiar with the products' design and functions.

In 2007, Charles left MYOB (as it was) to become a freelance consultant with a specific focus on Electronic Document Management systems for the accountancy profession.

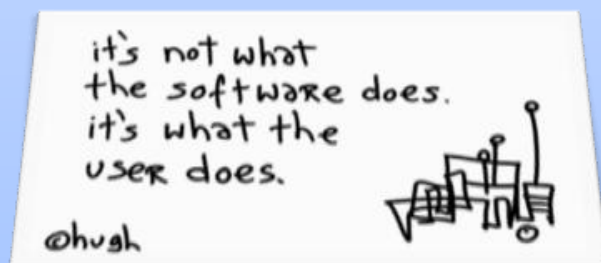
Charles has consulted and trained on CCH Document Manager - developing feedback for CCH on the product, writing training materials and developing best practice for the implementation of the software.

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EXECUTIVE SUMMARY

Despite Singleview having been withdrawn from the market over two years ago, there are more than 100 firms still using the software across the UK and Ireland.

Following the acquisition of MYOB's UK operations by Wolters Kluwer/CCH, the decision was taken to develop a brand new product, built from the ground up, as a part of the 'Central' suite. This decision inevitably produced a significant delay in progress for the Singleview user-base, who have not been provided with any new releases or updates since version 4.40 came out in late 2007.

On the plus side, this 'clean slate' approach gave CCH a chance to review what they have learned with Singleview, and the new product has been designed with those experiences in mind, so you will see significant new features that Singleview users have been requesting for some time.

With the release of Document Manager v1.2 (and with v1.3 scheduled for this spring) CCH are starting to consider migrating Singleview sites across to the new product. While CCH are working on the purely mechanical process of moving data and documents from one system to the other, the process of migration will inevitably make demands on the firm.

1. You will need to change (and possibly upgrade) your server hardware to support the new product. While CCH Document Manager does not necessarily require more powerful servers, its requirements are somewhat different – requiring a slightly different combination of capabilities.
2. You will need to review your scanning hardware. CCH Document's range of supported scanners differs from Singleview's, and you may need to re-organise the way you do things to accommodate this.
3. You will need to re-think the way your electronic filing system is designed. CCH Document Manager has a very different underlying 'ethos' from Singleview's, and this will require a bit of thought to ensure that the new system is used to its best. The change will also require some clear communications to staff, so that they understand what has happened to their documents.
4. You will need to review your document handling procedures. The new software has a different way of doing things, which will have a knock-on effect on your internal processes.
5. You will need to re-train all your staff on the new system. CCH Document Manager is a completely new product, which looks and behaves very differently from Singleview. The common 'CCH Central' way of doing things will certainly help smooth the process, but re-training is essential.

This document describes the key differences between the two systems, and discusses the practical issues that must be considered when planning your migration and finally retiring Singleview.

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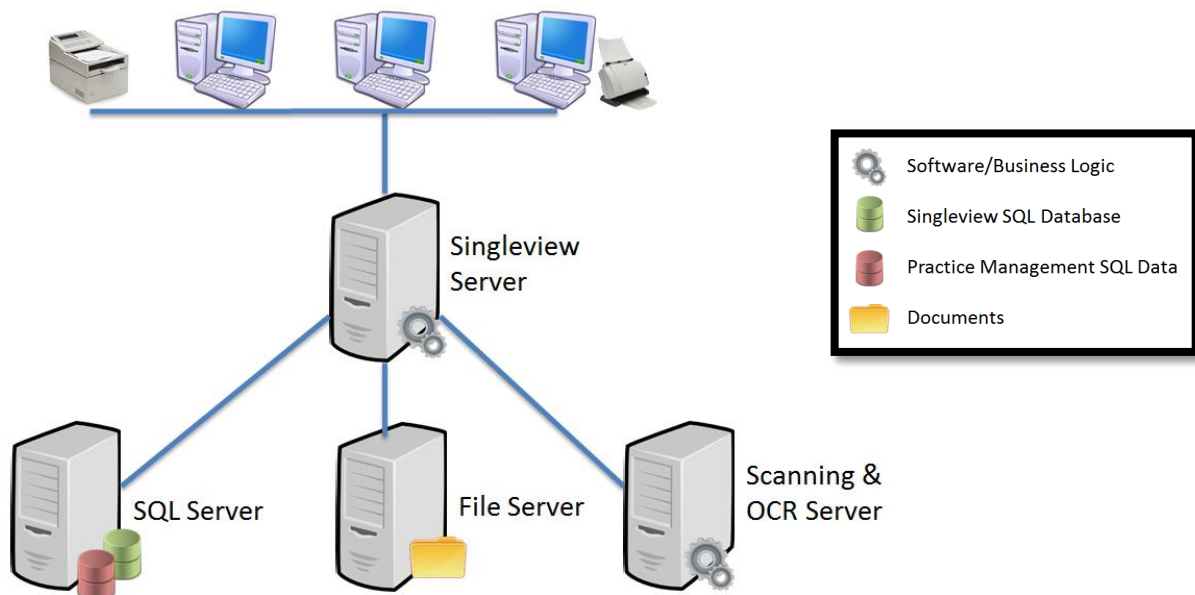
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CORE INFRASTRUCTURE AND HARDWARE

SINGLEVIEW – SERVER TOPOLOGY

Singleview is a browser-based product, so the heart of the system is the 'Singleview intranet Server' – which hosts the Singleview web-pages, along with a set of .NET Web Services that do most of the heavy lifting. All of the desktop PCs and scanners in a firm access Singleview's features by talking to the Singleview server.

Singleview has its own SQL database (called 'SVControl420') which usually lives on the same SQL-Server as the firm's main practice management database (CCH Central, Practice Engine, or whatever). The two databases talk to each other when Singleview needs client information.



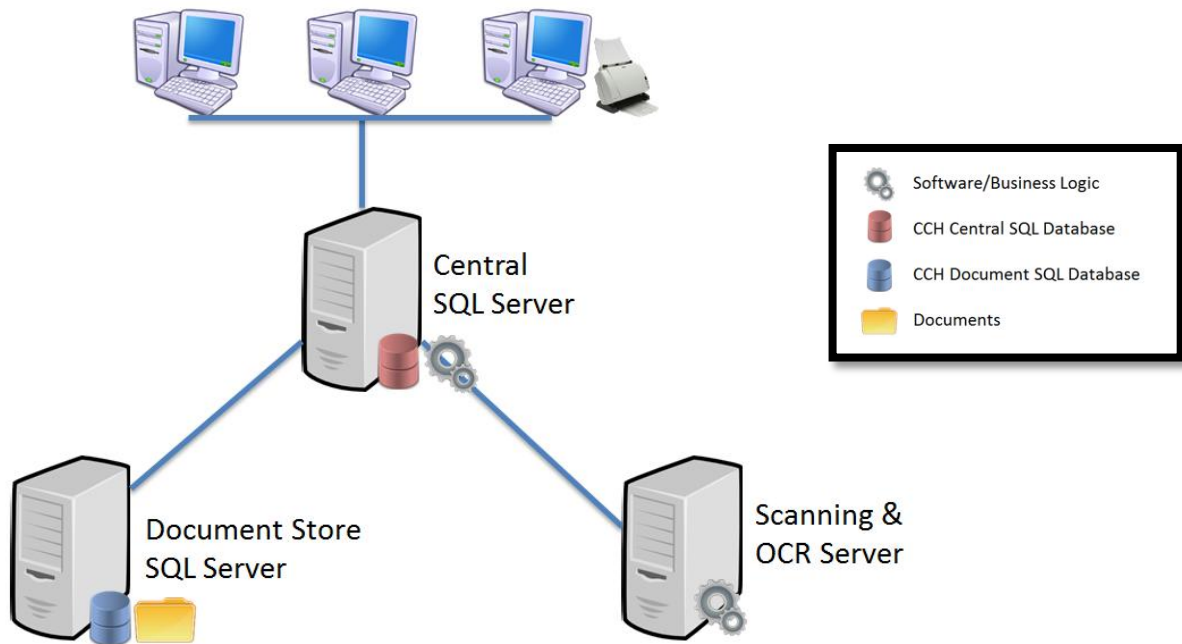
**Singleview installations can vary from site to site – this diagram illustrates the most common topology*

The documents are physically kept in a specially configured folder on the firm's main file & print server. Singleview tracks the documents in its database and is responsible for moving them around and delivering them to users when required. The document store folders are human-readable, so they can be accessed by users in Windows Explorer – even if Singleview is offline.

A dedicated 'Scanning & OCR' server is responsible for processing all scanned images from the various scanners in the practice. It converts the raw images into searchable PDF files and then passes them to Singleview for filing.

CCH DOCUMENT MANAGER – SERVER TOPOLOGY

CCH Document Manager is closely integrated with CCH Central, so most of the key functionality (including the document index data) is all in the main Central SQL database (along with data for CCH Time & Fees, CCH Personal Tax, etc.)



**Installations can vary from site to site – this diagram illustrates the most common topology*

Documents themselves are stored using a second specially-configured SQL database that utilises Microsoft's new *FileStream* technology to manage the documents on a dedicated 'Document Store' server. The document store is entirely (and deliberately) incomprehensible to users who attempt to access it directly – so the only way to retrieve a document is through the CCH Document Manager application.

As with Singleview, scanned images from around the firm are processed by a dedicated server. However the OCR/PDF technology is NOT the same as Singleview's.

RE-ORGANISING YOUR SERVER HARDWARE FOR CCH DOCUMENT MANAGER

While the new system appears to demand one fewer server than a comparable Singleview system, there are differences in the combination of hardware requirements on the different servers that may present some challenges (and may mean that you will need to purchase a new server).

- The existing '**SQL Database Server**' in the Singleview system may be capable of becoming the '**Central SQL Server**' in the new design. Note that you **MUST** upgrade the CCH Central database server to use **SQL Server 2008**. Earlier versions of SQL-Server are not supported. **You should perform a review to ensure that your current server can support the demands of SQL-Server 2008.**

While the existing CCH Central database will grow because of the new document index data, the old Singleview database would be removed from this server once data-migration was complete – releasing disk space. **You may need to ensure that there is enough disk space on this server to temporarily house both sets of document data during the migration.**

- In all likelihood, the **Scanning Server** can be re-used 'as is' (Removing the old Singleview components and installing the new CCH ones). This server only stores scanned images on a temporary basis as it processes them, so does not require very much disk space.
- The possible problem area is the '**Document Store**'. This machine will physically store all of the documents in the new CCH installation. This machine must host an instance of SQL-Server 2008, and it must have a relatively large disk capacity (with high-resilience features such as RAID5) because tens of thousands of documents will be held on it.

You should budget for a new server to take on the 'Document Store' role. This machine needs the processing power and RAM to support SQL-Server 2008, and it needs a significant amount of RAID5 disk capacity.

The issue is not the inherent power of the machines, but that the new software demands a different combination of features. Re-specifying the existing kit to suit the new system will need a degree of planning (and, very likely, a bit of cash!). A practice that is looking to migrate will want to keep its Singleview system up and running while the new system is installed, so this imposes further limits on what can be done to the old servers.

I suspect the practical end result is that most practices will take the low-risk approach, and end up buying TWO new machines to act as the **CCH Central Server** and the **CCH Document Store**. This approach allows for a pretty painless migration with Singleview staying live and operational during most of the process – transitioning to 'read-only' operation as the new system approaches readiness.

ONE POSSIBLE MIGRATION PATH

1. Buy and set up a new 'Document Store' server with SQL-2008 and lots of disk space.
2. Upgrade CCH Central/VPM to the latest version (including SQL-Server 2008) and install the new 'Document Manager' software modules on the existing Central SQL Server. (No impact on hardware and everybody can carry on using Central, VPM and Singleview while this happens).
3. Deploy the new CCH Central client software to the desktops (No impact on Singleview operations) and verify that everything is working. (Security settings in CCH Central can be adjusted to hide the new Document Manager screens from users until you are ready to start training).
4. Complete configuration of the CCH Document Manager system – setting up templates, security structures, new user Home Page screens, etc.
5. CCH perform the data migration of documents from Singleview to the new CCH DM product (all Singleview's documents – currently held on the file server – will be copied to the new 'Document Store Server'). NOTE that Singleview can stay operational during this process, although users must be told NOT to create or edit documents in Singleview any more.
6. Start user training sessions – making sure the new software is operational when they return to their desks.

The final stages of the process can be carried out at any time, once the new system has settled:

1. Uninstall the Singleview components from the OCR & Scanning Server
2. Uninstall the Singleview Email Filer and Scanning Workstation software from desktop PCs
3. Shut-down and decommission the Singleview Server (using it for something else later?)
4. Delete the Singleview database from the SQL Database Server
5. Delete the Singleview documents from the file server (your file server gains a fair bit of space as a bonus)

SUPPORTED ENVIRONMENTS

There are a number of environmental issues affecting both products – In the case of Singleview; these tend to relate to incompatibility with very new environments. In the case of CCH Document Manager, there are problems with older ones.

SINGLEVIEW - 64-BIT SERVERS

Singleview was not written with 64-bit server Operating Systems in mind, and will not install cleanly (Even on older versions of Windows Server such as 2003). Much new server hardware is shipped with 64-bit versions of the software installed by default, so the likelihood of problems if a re-install is needed will only increase. A manual workaround is possible.

SINGLEVIEW - WINDOWS SERVER 2003 R2

The Singleview MMC Management Console will not function on Windows Server 2003 R2 or later (or on Windows Vista or Windows 7) because of changes to the MMC system. No solution has been found.

SINGLEVIEW - WINDOWS SERVER 2008

Singleview does NOT install or function on Windows 2008 Server (32-bit or 64-bit versions). This is caused by significant changes to the IIS Web-Server components of Windows.

A solution has not been identified so far, and no further investigations are taking place.

SINGLEVIEW - MICROSOFT OFFICE 2010

An issue with the Singleview Email Filer exists on Outlook 2010. This is likely related to the introduction of the 'Ribbon' User Interface to Outlook in the 2010 release. No solution has been found.

CCH DOCUMENT MANAGER - SQL SERVER

CCH Document Manager demands the use of SQL-Server 2008 (Any edition, including SQL-Server Express). You can mix editions (Standard Edition for the main database, Express for the document store, for example). Note that the limitations inherent in SQL-Server 2008 Express will place a limit on the number of documents that can be stored, so you may need to plan for the additional SQL-Server licence at some point in the future.

CCH DOCUMENT MANAGER – CITRIX/TERMINAL SERVER

The graphical 'Flow View' feature in CCH Document Manager does not work when using Citrix or Terminal Server. This is related to the graphically intensive nature of the 'Flow View' display.

SCANNER HARDWARE

Singleview's scanner support varies in a number of ways from that included in CCH Document Manager, so you may find that the migration will demand some changes to your scanning hardware and processes.

HP DIGITAL SENDERS

CCH Document Manager does NOT support Hewlett Packard Digital Sender devices. If your Singleview system uses these, then you will need to plan for replacing them with desktop scanners.

In many Singleview sites, Digital Senders were used for a number of different tasks, so you may find that there is still a place for them in the firm, but you will NOT be able to use them to scan directly to CCH.



Because desktop scanners, by definition, require a desktop PC to control and operate them – this may require some reorganisation. While the HP9100C could be located on a small table in a common area or corridor - you will now need to find room for a PC, chair, etc.

DESKTOP SCANNERS

Singleview's 'Scanning Workstation' module was designed to work only with scanners that supported the 'ISIS' interface standard. This is partly a historical legacy, as high-speed business scanners were originally all ISIS-based with SCSI interfaces rather than TWAIN/USB.



CCH Document Manager supports TWAIN, ISIS and WIA. TWAIN scanners are now much faster than they were a few years ago, so the change became practical, particularly as TWAIN scanners are more readily available and often cheaper.

COPIERS AND MFDS

Singleview includes features for defining 'Watched' folders that could be used as destinations for network-enabled scanners (such as most modern photocopiers). This means that copiers can act as secondary scanning devices for Singleview.

As of version 1.2, CCH Document Manager does NOT support this feature, so networked scanners, copiers and MFDs will NOT be supported.

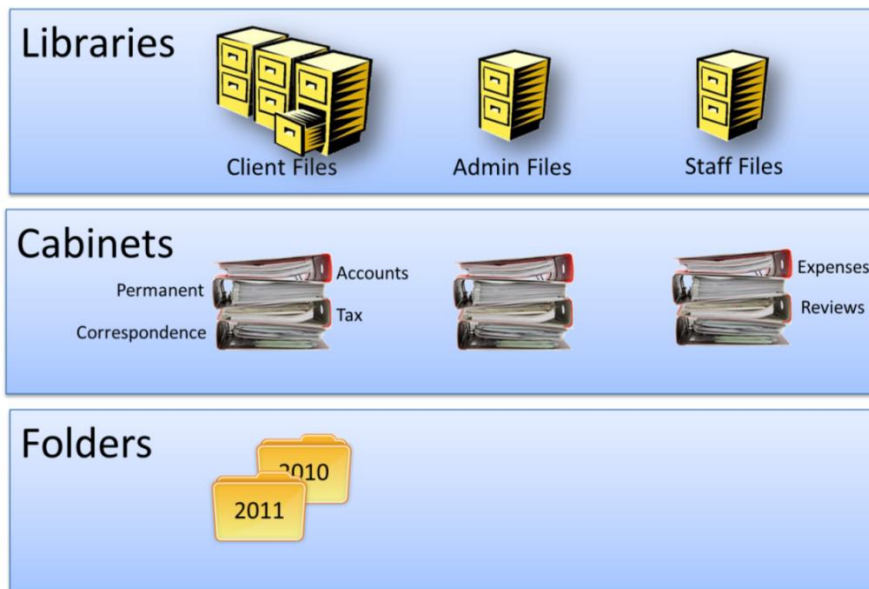
CCH do intend to add this feature, but it remains unclear what the timescale for this might be.

THE CORE DOCUMENT SYSTEM

SINGLEVIEW – FILING STRUCTURE

The top-level of organisation in Singleview is the Library. Singleview allows up to twenty-six libraries – although most firms use three or four. Any library can be designated as linked to PM data (contextual) or stand-alone (non-contextual). It is common practice to designate separate libraries for distinct file sets such as insolvency, corporate finance, or financial services work.

Singleview Libraries are organised into 'Cabinets' (equivalent to a single suspension-file in a manual system) and Cabinets can be sub-divided into folders (typically, folders are used to represent years within a file).



Singleview Cabinets are defined to suit the preferences of the practice (typically matching the filing conventions already in use within the firm). If the practice always used blue folders for tax papers, then Singleview would let you create a cabinet called 'Blue Tax File'.

Cabinets can be associated with data from the practice management system (so that the 'Blue Tax File' cabinet only appeared if the client had a 'Personal Tax' assignment within practice management, for example). You can also create assignment-independent cabinets for 'Correspondence', 'Permanent', etc.

A typical set of cabinets might, therefore be...

- **Correspondence**
- **Permanent File**
- **Tax Working Papers (only if a personal tax client)**
- **Accounts Working Papers (only if an accounts client)**

While Singleview does have a document database, it also has a physical folder structure on your file-server that forms a critical part of the design of the system.

When you define a Singleview Cabinet for storing (for example) Tax Working Papers, the Cabinet definition includes an algorithm that checks if the client has a Personal Tax assignment and then calculates a network UNC path that will be uniquely associated with the cabinet that the user sees.

So... A '**Tax Working Papers**' cabinet for client '**A123**' might map to a physical network path like this:

\\SERVER\SVDocuments\Clients\A123\Tax\2010-11

Singleview then closely ties the on-screen 'Cabinet' to that physical location. (If the UNC is changed for some reason, or is moved to a different server – then Singleview loses track of the documents. Similarly, if the client code changes, Singleview loses track of EVERYTHING associated with that client).

When carrying out searches within Singleview, the physical location of the document in a particular folder is vital to help Singleview backtrack to locate the appropriate database record once the search engine has done its job.

This close association with specific locations on the network server means that Singleview cannot easily re-assign a document to a new client or different folder (from Tax Working Papers to Correspondence, for example) because that would require that the document be physically moved to a new folder at a new UNC path – and there could be thousands of documents.

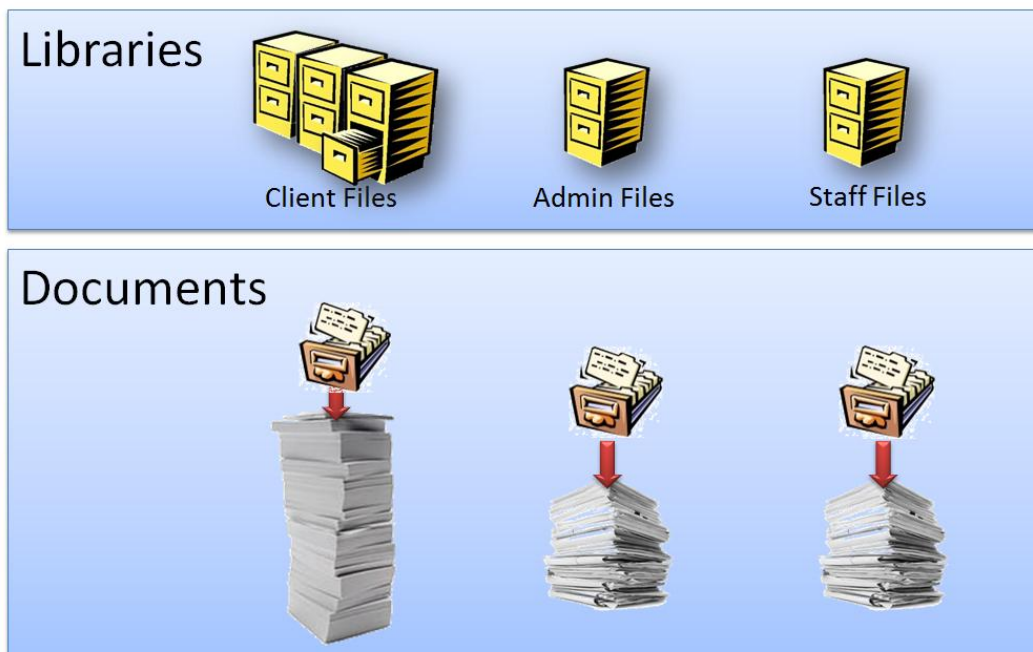
This approach does have one big benefit – namely that Singleview builds a nicely organised folder tree on your server – using friendly names. If Singleview goes down for any reason, or if the practice decides to stop using the software, then the documents can be easily found and retrieved by users with no technical knowledge.

While popular, the problem with this approach is that it is quite inflexible, because it's almost impossible to re-organise at a later date. Once the structure has been decided – it's there for good. The key to a successful Singleview system is getting the filing design right first time and sticking to it.

CCH DOCUMENT MANAGER – FILING STRUCTURE

The CCH system also has 'libraries' at the top-level, grouping the firms' documents into those main categories that are never likely to change. CCH allows ANY NUMBER of libraries, but only ONE can be associated with your Practice Management client data. Sadly, this means you cannot use libraries to distinguish General Practice work from, say, Insolvency work (this must be done elsewhere in the design).

The organisation of documents *within* a library is entirely fluid. All documents stored to a CCH system are saved to a single gigantic 'pile' with no pre-determined organisation.



Each document is indexed with a collection of bits of information (Client code, document date, author, work-type, year, and so on), and this information is stored in a database. Users who want to see a specific group of documents must use the information in the database-index to locate the documents they want to access.

This might seem disconcerting, but this approach is hugely flexible, allowing different users in the firm to structure the filing system in very different ways, depending on their needs. Reorganising is easy, because the documents don't have to be touched – only the index database needs manipulating.

The downside is that this approach requires a degree of getting used to. You have to abandon any mental image of traditional folders, trust the technology, and accept that you are looking at a 'virtual' filing system that can reorganise itself in an instant. Needless to say, the trick to making this approach work well is to design your indexing system well. You are utterly dependant on the index database.

This approach is common to most Document Management systems. Singleview's approach is the exception.

DOCUMENT TYPES

A key field that **MUST** be supplied when filing a document is the document 'Type'. A great deal of CCH Documents' functions revolve around document type, and **your choice of types is vital to the success of the project**. Singleview has types as well, but they are of relatively peripheral importance.

You can opt for a highly detailed list of hundreds of specific types ('P60', 'Dividend Voucher', 'Cheque', 'P45', 'P11D', 'SA100', 'CT600', etc.) or you can opt for very broad groupings ('Books & Records', 'Working Papers', 'Correspondence', etc.). Broad groupings are probably better at first, with new types added as demand for them appears.

Template documents can be pre-associated with a type, which can then impact where a document is stored. User access rights to a document are affected by its type, and different document types can demand different data from the user (so, for example, you could configure the system to demand a tax-year be entered for the 'P60', 'P11D', and 'P45' types, but then demand a financial year for CT600s).

THE DOCUMENT INDEX

Finding a particular document (or even a list of documents) relies entirely on the information in the CCH Document index database, which at a basic level, records the following data:

- **Library** (The filing library – see page 9)
- **Type** (*as discussed above*)
- **Contact** (The contact, client or supplier code)
- **Assignment** (The client assignment code – optional but handy)
- **Job** (The assignment job – optional but handy)
- **Description** (A description typed by the user)
- **Filename** (The actual filename of the document)

The screenshot shows a software dialog box titled "CCH Scan - Add Documents". It features several input fields and dropdown menus for configuring document metadata. The "Library" dropdown is set to "Client Files", and the "Type" dropdown is set to "Tax Return". There is an "Apply to Selected" button next to the "Type" dropdown. Below these are fields for "Contact", "Assignment", and "Job", all currently empty. A "Description" text box is also empty. To the right of the "Description" field is a "CCH Autofill" checkbox, which is unchecked. A "Task" section contains an "Employee" field, an "Action" dropdown set to "Review", and a "Comment" text box. At the bottom, a "Publish to Portal" section includes "Cabinet Name", "Folder Name", and "Mode" dropdown menus.

(There are lots of other fields, as there are in Singleview, for tracking things such as the date the document was filed, the user who filed it, etc., but the list above shows the key fields that users are asked to complete).

CCH Document allows for the creation of *custom fields* that can be associated with a document. What this means is that if you want to categorise all your documents by author's golf handicap, then you can do this. (although you risk overloading your staff with work if you create too many fields).

So... when filing a piece of tax working papers to client A123, the user might complete the document database record as follows:

- **Library** = **'Client Files'**
- **Type** = **'Computation'**
- **Contact** = **'A123'**
- **Assignment** = **'Personal Tax'**
- **Job** = **2011**
- **Description** = **'2011 Tax computation'**
- **Filename** = **'2011Taxcomp.pdf'**

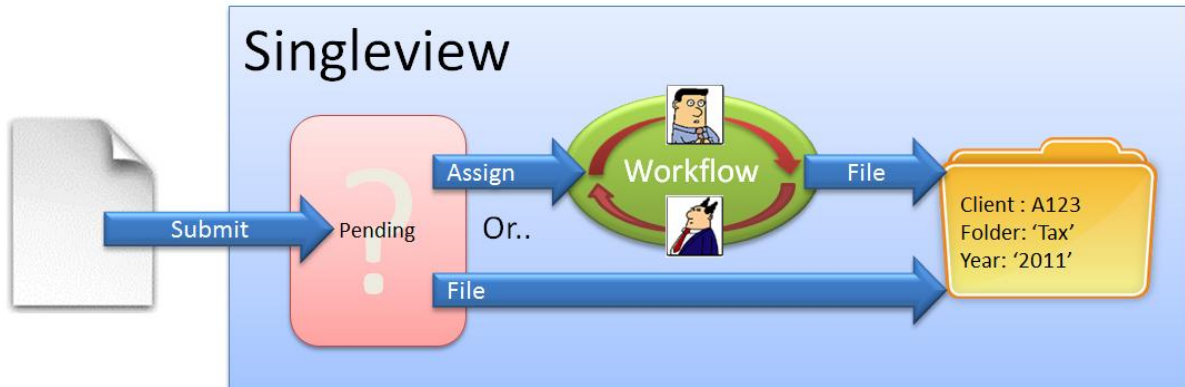
You will note that there is no actual mention of a 'Tax Working Papers' folder anywhere – The database doesn't actually store a specific bit of data for 'folder name'. Instead the user would access the appropriate client record in Central and then search for all documents where **'Assignment = Personal Tax** and **Job=2011** and **Type=Computation'**

(In reality – you would probably already have your screen pre-configured to group documents by assignment and job, so completing the search would be relatively simple).

Now – if you suddenly decide you want to see all 2011 Tax comps created by two particular members of staff, you can re-phrase the question, and CCH Document will give you a list. Singleview would not be able to do that quickly or reliably.

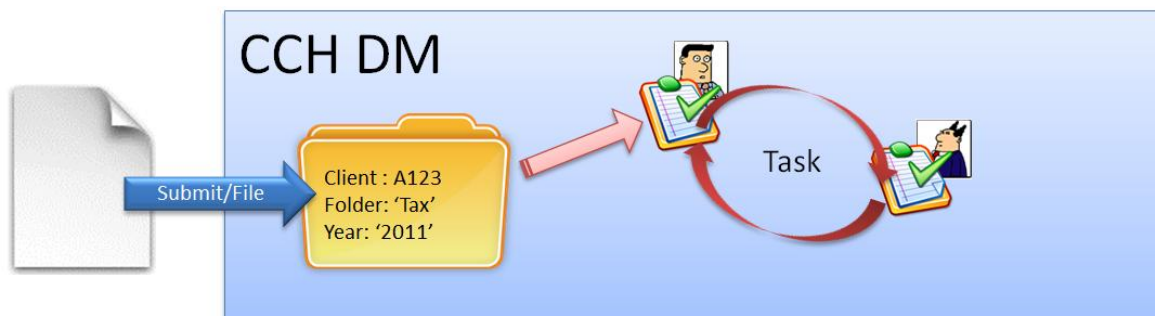
HOW DOCUMENTS MOVE THROUGH THE SYSTEM

In Singleview, documents move through three stages.... **Pending, Workflow, and Filed.**



- When a document is initially submitted to Singleview, it remains 'Pending' until the user has coded the documents with a client code, a filing destination, etc. The filing destination can either be a workflow, or it can be a filing cabinet. Documents usually remain 'Pending' only for a matter of seconds while the user assigns or files the document.
- When a document is in a 'Workflow' – it lives in a user's in-tray and can be passed from person to person. It is physically separate from the main document store.
- When the document is ready for filing, it goes to its final resting place in the document store, and cannot be moved or changed again.

In CCH Document Manager, documents are immediately saved to the main document store.



- It is not possible to store a document in the system without fully coding it to a filing location – there is no 'Pending' stage – you MUST pick a location immediately or abandon the submission.
- All documents handled by the system appear instantly on the client file for all users to see – including draft letters documents (There is no specific indicator that the document is draft).
- If you want to 'forward' a document for someone's attention, you create a 'Task' which appears on that users' Central Home Page and cross-references back to the document record. The document stays in the client file, with a 'tasks' flag to indicate that someone is working on the document.

MIGRATION CONSIDERATIONS

The practical upshot of this very-different approach between the two systems is a very different way of using the systems on a day to day basis

YOU'LL HAVE TO CHANGE THE FILING DESIGN

CCH Document Manager's filing is inextricably connected to the way in which you have organised your assignments and jobs in Central/VPM. Sometimes this can create a bit of tension between the systems, as you may not always want to file your documents the way you analyse your WIP.

Because documents are coded to a Central Assignment, rather than a traditional folder, you won't have any equivalent to 'Correspondence' or 'Permanent' folders (because you won't have assignments for those categories). You could create 'fake' non-chargeable assignments within Central, but I am instinctively wary about these sorts of workarounds, as it feels like trying to fit a square peg in a round hole. I am also not keen on the idea of using a custom field to indicate 'folder' as again it feels like trying to impose an old way of doing things on a new system.

Many firms use the old VPM Assignment structure without using jobs (or schedules as they were called) creating new assignments each year. This is not ideal for the document management system, as it makes it very hard to search across multiple tax-years in a single query, for example. If as a practice, you do not use VPM schedules/jobs, then you may need to consider some changes to your VPM assignment design as a part of the project.

In short – CCH Document Manager relies even more than Singleview on high quality data in VPM/Central. Any advance effort to 'clean up' your Central client data will pay dividends.

YOU'LL HAVE TO RE-TRAIN YOUR STAFF

Because CCH Document doesn't show users anything like a traditional hierarchical folder organisation, they can have trouble gaining a handle on where all the documents actually *are*. The process of breaking that folder and sub-folder metaphor is one of the biggest hurdles to overcome.

With careful thought – it is possible to build a design within CCH Document that still feels familiar enough so that users can get to work on day one, while constructing an indexing system that permits huge flexibility when users have gained confidence with the software.

USERS & SECURITY

CCH Document Manager's security is managed entirely within the CCH Central security system. Every user within the Central system can belong to multiple security groups, and rights to perform actions or access functions are then granted or withheld as needed.

CCH Central provides three broad groups of security controls:

1. Task Security (Controls what actions a user can perform in the software)
 2. Document Security (Controls which types of document a user can access)
 3. Contact Security (Controls which client records a user can access)
- CCH Central provides very fine levels of control over which functions to allow and deny for particular users. In Singleview, it was possible to limit broad access to menu items, but not control features within a screen to any great degree.
 - CCH Central can apply security against individual contact records – something that can only be achieved in Singleview with a fair amount of hassle and complexity. This is a major advance over Singleview, and was a common question from new users.

For a practice with a need for 'firewalls' in their filing system (between General Practice and Insolvency, for example) – the loss of Singleview's 'Library' tools means that Contact Security will take over as the mechanism for achieving this. By defining a security group that controls access to all Insolvency clients, you can limit access to the associated documents.

MIGRATION CONSIDERATIONS

If you have implemented any kind of security within Singleview, then the transition to CCH Document Manager will require a translation of Singleview's security groups into the CCH Central equivalent. In most cases, because CCH Document's abilities exceed those of Singleview, the translation will be relatively straightforward.

Example:

In my system, I have an Active Directory security group called 'sv-DeleteDocs'. Singleview has been configured so that only members of that group can delete documents from filing cabinets.

In CCH Document, you would access the 'Task Security' system to limit the **#Document Centre #Delete** task to members of a CCH Security group (that you might call 'Document Deleters').

FEATURES & FUNCTIONS

MISSING IN ACTION – SINGLEVIEW PORTAL FEATURES

Singleview was always designed to be a little more than the traditional document management product. Accordingly, it included a number of features that made it unique – these can be generally classed as the ‘portal’ and/or Intranet functions.

CCH Document Manager was designed to be a ‘pure’ document management product, so the ‘portal’ features of Singleview have been deliberately omitted.

CLIENT DATA PORTAL

When users accessed a client record within Singleview, the software would attempt to identify and display related information from a number of Solution 6/MYOB products – delivering summary information in a single set of screens within the browser window.

Links included:

- Summary WIP and Fees balances from Time & Fees software (VPM, Practice Engine, etc.) with a drilldown to the underlying transactions
- Summary data from the most recent Tax Year records for the client in PerTAX
- Summary KPI data from Viztopia Accounts Production
- Summary information from Trust Accounts

This feature has been deleted. As CCH gradually migrates all products into the Central environment, it is possible these features may return as a part of the Central system itself.

QUICKLINKS

Singleview included a ‘Quicklinks’ system that allowed authorised users to create and publish a library of internet hyperlinks for the entertainment and education of users.

This feature has been deleted. There is no equivalent in CCH Document Manager (or anywhere in CCH Central).

NEWS

The ‘Home Page’ of the Singleview intranet included a ‘bulletin board’ where authorised users could create ‘news items’ that would be displayed to all (or selected) users whenever they launched the software.

This feature has been deleted. There is no equivalent in CCH Central.

SEARCHING AND LISTING

Search in Singleview was kept very separate from other parts of the system. You could locate a document using database information, or you could search by its textual content, but not both at once.

Singleview's database search was also very limited, whereas CCH Document Manager provides a huge degree of variety – including sorting and grouping of search results – a common Singleview request.

DOCUMENT LISTS

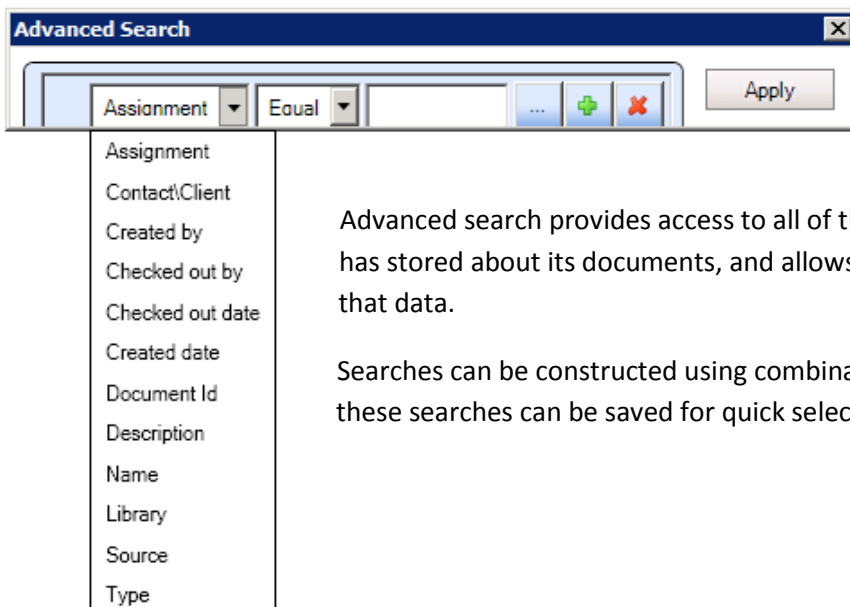
Singleview offered a number of screens that contained pre-set lists of documents that could be viewed with a single mouse-click. Example included things like *Recent Documents* (for a given user or for a given client) that showed the last 200 documents touched or viewed by a person (or for a given client). Users were encouraged to use these lists rather than try to create special searches – as they were invariably faster than manually searching.



CCH Document Manager doesn't have anything that directly matches this. Instead, users must use the 'Advanced Search' facility to generate similar results. This isn't quite a perfect solution because, although advanced searches can be saved for quick re-use, they need constant updating if they include any date-related elements (and any concept like 'recent' has to be translated into a date in the search).

SIMPLE SEARCH AND ADVANCED SEARCH

CCH Document Manager places a 'Search' box at the top of every document screen within the system. This 'Simple search' might be best described as like the 'Quick Search' panel in Singleview - offering the most commonly used search functions in a single place.



Advanced search provides access to all of the information that the system has stored about its documents, and allows users to construct queries using that data.

Searches can be constructed using combinations of different fields, and then these searches can be saved for quick selection and re-use at a later date.

MIGRATION CONSIDERATIONS

Where search is concerned - migration is really about changes to user expectations and training.

Search in Singleview was usually seen as something you did only when you couldn't find a document on one of the ready-made lists, or by directly browsing the cabinets themselves.

In CCH Document – search is vital for making best use of the system's inherent flexibility. User training during the transition process is key to the success of the migration.

TEMPLATES & DOCUMENT CREATION

Any replacement for Singleview HAD to include the ability to generate documents from a template library – it is a central plank of every Singleview installation. CCH Document Management does incorporate such a system.

TEMPLATES

While CCH Document includes the ability to create a central library of Template documents, and then use those templates to quickly create standard letters, the devil is in the detail. Any practice converting from Singleview to CCH Document Manager will encounter a number of challenges/

Firstly - CCH offers support for MS-Word templates ONLY (There is no support for Excel or PowerPoint templates). While the vast majority of your Singleview templates will in fact be for Word – you will need to find alternative options for any non-Word templates.

Secondly – Singleview's approach to the design of the templates themselves was powerful, but proprietary. Singleview used special codes, embedded within Microsoft Word 'bookmarks'. The special codes were interpreted by Singleview into text, which were then placed in the document. The Singleview system allowed for conditional elements that could change the final text on the fly (removing duplicate elements from 'Our Ref' codes, for example). The CCH system will NOT provide any equivalent.

CCH Document Manager templates use standard Microsoft Word mail merge codes. These codes are used elsewhere in CCH Central (for generation of bills and mail merges, for example) which clearly makes sense. However, the change has reduced the power of the system when compared to Singleview.

DOCUMENT CREATION

The document creation process is very similar in concept to that used in Singleview

1. The user clicks 'create document' and selects a template from a list
2. The user completes a short on-screen wizard, in which they select the client, addressee, address, and other information that the system needs to complete the creation process
3. Microsoft Word launches automatically, with the new document ready for editing
4. The user completes the editing process, and can then close Word. The document does not require manually saving or naming, as that has been taken care of by the system

The screenshot shows a dialog box titled "Document Creation Wizard" with a close button in the top right corner. The main title is "Step 1 of 2: Choose Template and Addressee Details". There are two tabs: "Addressee" (selected) and "Filing Details". The form contains the following fields and controls:

- Template: Text box with a browse button (...)
- Type: Text box
- Name: Text box
- Action: Text box with a browse button (...), a dropdown menu set to "Review", and a button.
- Addressee: Dropdown menu
- Salutation: Text box
- Addressee Line 1: Text box
- Addressee Line 2: Text box containing "The African Wildlife Trust"
- Address: Text box with a dropdown arrow, containing "1 Merchant Place"
- From: Text box with a browse button (...), containing "Wagner, Peter"
- Signatory: Text box with a browse button (...)
- Leave document checked out after creation.
- Buttons: Cancel, <Back, Next>, Finish

CCH Document also preserves the concept of check-in and check-out from the Singleview Workflow system (and, to be fair, almost every other document management system as well).

- A document can be 'checked-out' and 'checked-in' by a user with a mouse click
- Documents normally exist in a checked-in state - They can be opened and viewed, but cannot be edited (They are read-only).
- Any user can check-out a document (if their security rights permit)
- When a document has been checked-out, it can be opened and modified by the user who checked it out. No other user is allowed to check out that document (thus preventing conflicts). Checked-out documents are flagged as such, so other users can see who is working on them.

In CCH Document – there are several short-cuts to reduce the hassle factor involved in this process. An ‘Edit Document’ option performs a combined ‘check-out-then-launch-Word’ function with a single mouse-click.

MIGRATION CONSIDERATIONS

The new document creation system is similar enough to Singleview, that users will have few problems getting the idea.

However, the devil, sometimes, is in the detail, so there will be work to do during the migration period:

- You will, in all likelihood, need to set aside some time to convert all of your Word templates to the new format and upload them into CCH DM. I do NOT anticipate that CCH will be able to provide an automated conversion. You should allow at least 15 minutes per document to remove the old Singleview bookmark codes, insert new mail merge codes, and then load the new template into CCH Document.
- You will have to accept that some automatic ‘intelligence’ within Singleview templates will not transfer to the new templates.
- Singleview was capable of delivering some data from PerTAX to its templates (UTR number, NI number, Tax Office address, etc.). This feature has not yet been implemented in CCH Document Manager; although I have no doubt that it will be done.
- Although CCH Document is a part of Central, the integration is not yet all it should be. CCH Central’s mail merge functions do not yet know how to save into the Document Manager, and VPM bills, for example, will not yet be saved to the filing system. This will come in time, but you may need to manage staff expectations a little.
- If you have any Excel or PowerPoint templates within Singleview – these will have to be stripped of any Singleview codes, and stored on your network for users to access manually.

WORKFLOW & COLLABORATION

The biggest weakness in CCH Document Manager at present is workflow and collaboration. It doesn't have any in the sense that a Singleview Workflow user would recognise.

As described on page 12 – the CCH system allows users to create 'Tasks' which are associated with a document, and to send those tasks to another user. A task can be assigned a due date, a priority and some free-format notes.

So... If I want to forward a piece of client correspondence to a colleague, I can create a task for that person, and include a link to the original document.

The task I have created then appears on the user's 'tasks' list. There is no active notification for the recipient, however.

There is no mechanism for controlling *who* these tasks are sent to, or what the person can then do with the document. It's not, therefore, possible to use the tasks system to manage a business process at present.

Tasks							
Name	Employee	Code	Type	Subject	Status	Priority	Due Date
<input type="checkbox"/> American Express	Peter Wagner	Review	Document	New Document	Not started	Medium	8/6/2009
<input type="checkbox"/> Client 1002	Peter Wagner	Meeting	Appointment	New Appointm...	Not started	Medium	8/13/2009
<input type="checkbox"/> Client 1002	Peter Wagner	Meeting	Appointment	Savita's Appoi...	Not started	Medium	8/13/2011
<input type="checkbox"/>	Peter Wagner	Document	Document	My Benefits 20...	Not started	Medium	2/22/2010
<input type="checkbox"/> Maya & Co	Peter Wagner	Document	Document	Customer Tem...	In progress	Medium	2/24/2010
<input type="checkbox"/> American Express	Peter Wagner	Document	Document	VPM survey d...	In progress	Medium	3/11/2010
<input type="checkbox"/> Asda	Peter Wagner	Document	Document	Test Doc	Not started	Medium	6/1/2010
<input type="checkbox"/>	Peter Wagner	Document	Document	Blogs and Wiki...	Not started	Medium	6/19/2010
<input type="checkbox"/>	Peter Wagner	Document	Document	Civil Evidence...	Not started	Medium	6/19/2010
<input type="checkbox"/>	Peter Wagner	Document	Document	Dual Screens...	Not started	Medium	6/21/2010
<input type="checkbox"/>	Peter Wagner	Document	Document	evidenceZB03...	Not started	Medium	6/21/2010
<input type="checkbox"/>	Peter Wagner	Document	Document	Infoconomy -...	Not started	Medium	6/21/2010
<input type="checkbox"/>	Peter Wagner	Document	Document	Inland Revenu...	Not started	Medium	6/21/2010
<input type="checkbox"/>	Peter Wagner	Document	Document	Legal admissi...	In progress	Medium	6/21/2010
<input type="checkbox"/> African Wildlife Trust	Peter Wagner	Document	Document	Signed CT600	Not started	Medium	7/27/2010
<input type="checkbox"/> Maya & Co/Audit	Peter Wagner	2 Unspecif	Scheduled		In progress		11/2006

There is also a usability issue in that - to actually see the document associated with the task involves at least six mouse-clicks from the tasks list. Far too many for reading the morning's post, for example.

Any Singleview user who doesn't have (or use) the Singleview Workflow module won't have a problem with CCH Document Manager as it stands now.

If, however, you have built even a few simple workflows and rely on the workflow system to distinguish draft documents from final ones, or 'active' documents from archived ones, then you will need to accept that you will have to wait until CCH complete their major new workflow engine for the Central system.

SCANNING

As has been mentioned earlier in the document – the current version of CCH Document Manager ONLY supports desktop scanners. Networked devices will not be supported.

When scanning in Singleview, the operator is permitted to capture the document without coding it to a client or a contact. The resulting document would be held as 'Pending' (or could still be submitted to a user via a workflow). In CCH

Having scanned a document, the user must then 'profile' the document into the system by coding the document (Type, Client, Description, etc.).

<input type="checkbox"/>	File Name	Type	Publish To Portal	Expiry Date
*				
<input type="checkbox"/>	ir46b.pdf		<input type="checkbox"/>	
<input type="checkbox"/>	ir46b-1.pdf		<input type="checkbox"/>	

In CCH Document Manager, documents CANNOT be accepted into the system until they have been fully profiled. A practical issue at this point is that you may wish to delegate the scanning tasks to a relatively junior member of staff who may not always be able to tell what client to code a document against. The only solution at present is to create a 'dummy' filing area within the system for 'client unknown' documents. (Either by creating a new client code, or possibly even a distinct library for the purpose – and then implementing a procedure to make sure regular reviews take place to deal with the document that end up there).

If you wish to forward some scanned documents to a colleague, then you would enter the person's name in the 'Task' panel in the middle of the form.

FILING EMAILS

CCH Document Manager preserves Singleview's approach of offering a custom toolbar button within Outlook itself. Clicking the button opens the document profile window – from where a user can code the document for storage. As with Singleview, users can select multiple messages with the CTRL key and file them in a single action. Also like Singleview, CCH Document manager 'tags' the filed email with the Document ID number, so that there is a clear cross reference between the user's Outlook system and the document files.

CCH Document Manager's email filer, however, provides a number of significant advances over that found in Singleview.

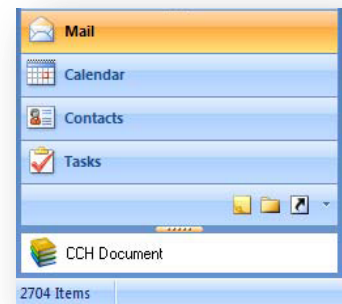
NEW 'DRAG & DROP' FILING OPTION

As well as using the familiar Singleview approach, CCH Document Manager offers an alternative mechanism for filing emails – drag & drop.

Users can 'drag' an email (or collection of emails) onto the new 'CCH Document' panel at the base of the Outlook bar to trigger the profile page – which then behaves as normal.

This arguably feels more intuitive and has a nicer 'flow' because users often use the drag & drop approach to move emails around within inbox folders.

It is worth noting that clicking on the 'CCH Document' panel also launches the CCH Document Centre within Outlook. I remain dubious as to the real-world benefits of this.



NEW EMAIL RECOGNITION FEATURE

When an email is filed, CCH Document Manager compares the sender's email address with CCH Central's contact database. If it finds a match, it suggests the matching contacts to the user – significantly reducing the amount of manual effort involved in filing emails against the correct client.

The system is not perfect (nor could it be) because often you will encounter the same email address being used to discuss both a company's accounts and the directors' personal tax (or the same address might apply to a group of companies – the list goes on). Nevertheless, it is a valuable time saver.

You may need to make an effort to fully populate your CCH Central database with email addresses before seeing the real benefits of this feature.

This feature was regularly requested for Singleview.

NEW 'FROM AND TO' FIELDS IN THE DATABASE

CCH Document Manager automatically captures the contents of the 'from' and 'to' fields from the email and copies them into two fields in the main document index database. This makes a huge difference when searching and filtering emails within the software (as, for example, it become instantly clear whether an email is inbound or outbound (not always obvious in Singleview)).

MIGRATION CONSIDERATIONS

Singleview users will find little to worry about in terms of email filing – the basics will seem very familiar and so once the new profile screen becomes familiar, there will be few issues.

The new features will be welcome additions.

UPLOADING DOCUMENTS

CCH Document Manager provides an upload feature that is very similar to Singleview's, but then also adds a completely new alternative in the form of a 'right-click' context menu in Windows Explorer.

MIGRATION CONSIDERATIONS

None – CCH Document Manager's upload feature is a general improvement over Singleview's upload function.

NEW TOYS

DOCUMENT LINKING

The ability to create connections between documents (an ‘electronic paper clip’) was one of the most commonly requested features in Singleview. CCH Document Manager will deliver this feature in version 1.3.

GET LOCAL COPY

A common query from Singleview users was “how do I take my files out to a client?”. With Singleview, there was no integration feature to help with this. By contrast, CCH Document has TWO options for the roving user.

1. A ‘Get local copy’ function will place the selected documents on a folder on the user’s hard disk.
2. The aforementioned ‘check-out’ function *also* places files onto your laptop hard disk, but also ‘flags’ the documents so that nobody else can touch them. If, therefore, you want to take some documents away to work on at home, you can be sure that the originals won’t be altered in your absence.

There are caveats – so you need to use these features with care, but it’s an advance on Singleview, and at least as good as most other systems (Autonomy WorkSite excepted – that’s MUCH better!).

SCANNING SEPERATOR SHEETS

CCH Document Manager will (from version 1.3) include the ability to recognise a basic set of barcoded separator sheets within a scan job. This will allow operators to load a scanner with a large collection of documents (interspersed with these separator sheets) and scan the entire collection without having to stop for each document.

DOCUMENT PREVIEW / FLOW VIEW

While Singleview tried to provide thumbnail images of documents within its screens – the feature was somewhat hit & miss (as it depended on the specific format of the document, and on the configuration of each PC).

Many Singleview users compensated for this by using a 3rd—party product called ‘QuickView Plus’ – which delivered a partial solution to the often-requested ability to ‘flick through the file’ on screen.

CCH Document Manager has an integrated preview tool (called ‘Flow View’). This gives users the ability to scroll through a collection of documents visually – often the best way to conduct file-reviews. It’s not perfect, but it’s heading in the right direction.

APPENDIX 1 – SITES WITH OTHER PRACTICE MANAGEMENT SYSTEMS

Although the majority of Singleview users are also VPM/Central users, there are a significant number of practices using it with other Practice Management systems. (mainly Practice Engine, but also STAR Practice Management and IRIS Practice Management).

As at the time of writing, CCH do not have any tools to support those firms who use alternative Practice Management systems (Primarily Practice Engine, but also STAR Practice Management and IRIS Practice Management).

I suspect that, in due course, CCH will suggest some kind of data synchronisation that will import data from these 3rd-party databases into a Central database – from where users will then be able to access the document management functions via a pared down installation of CCH Central.

OPINION

CCH Document Manager is unashamedly part of the CCH ‘ecosystem’ of products. The principle of the Central system is that, the more CCH products you have, the greater the benefits of that integration become, and the combined system becomes greater than the sum of its parts. Imagine generating a tax return from CCH Personal Tax where the system automatically knows where to save a copy of the return and comps – and does it without the user even asking.

If, as a practice, you buy into the integration argument and decide to follow that path, then the arguments for adopting CCH Document Manager are very strong – if not overwhelming. Much of the good stuff isn’t here yet but it will come in due course.

If, on the other hand, you prefer the ‘best of breed’ approach, then arguably the integrated nature of CCH Document Manager might well prove frustrating and cumbersome. If that is the case, then it may well be worth considering the alternatives.

A final significant factor, of course, is that CCH will offer you an upgrade of your Singleview licence to a CCH Document licence – with the only costs being the consulting services associated with the migration. Any alternative product would be a brand new purchase – with all the extra costs that entails.

APPENDIX 2 – A SAMPLE TRAINING NOTE

The next few pages are TWO examples of my preferred approach for end-user training notes on CCH Document Manager.

- How to create a letter
- How to find a document

I find there is nothing more frustrating than looking through a gigantic manual, looking for the one nugget of information you need to complete the task right in front of you. Anyone who has attempted the task of locating the correct tyre-pressures or oil-grade in the user-guide for their car will know exactly what I mean!

Rather than hand out large user-guides, I prefer to create a series of small, tightly focussed 'User Notes' that deal with one very specific task.

These notes can be adjusted quickly to suit each practice (using familiar clients in the screen shots, for example, and removing superfluous text on features that your particular installation doesn't need). You can mix and match the combination of notes that you hand out to different members of staff, depending on their role in the firm.

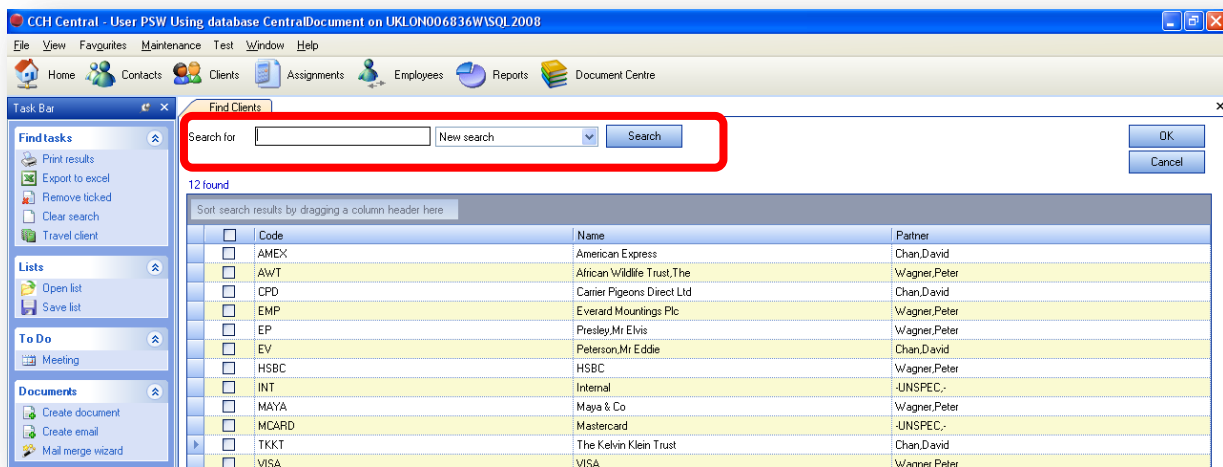
USER NOTE – CREATING A LETTER

The process of creating, editing and finalising a Word document in CCH Document Manager has several stages.

1. Find and select the contact or client
2. Use the 'Create Document' function to prepare the draft document and launch Microsoft Word
3. When the document is complete – print it and check it in.

STAGE ONE – SELECT THE CONTACT/CLIENT

In Central, perform a search for the contact or client. Click on 'Contacts' or 'Clients' on the top toolbar and enter part of the contact name or code into the 'Search For' field. The system will display a list of matching records.



Locate the correct contact/client from the results list and click on the appropriate record to highlight it.

On the 'CCH Document' section of the task bar, click 'Create Document'.

The 'Document Creation Wizard' window will open.



STAGE TWO – THE CREATE DOCUMENT WIZARD

Complete the relevant fields on the Document Creation Wizard screen

The 'Addressee' page defines the content and appearance of the new document...

Document Creation Wizard

Step 1 of 2: Choose Template and Addressee Details

Addresssee Filing Details

Template [...]

Type []

Name []

Action [Review] [...]

Addressee [v]

Salutation []

Addressee Line 1 []

Addressee Line 2 [The African Wildlife Trust]

Address [1 Merchant Place] [v]

From [Wagner, Peter] [...]

Signatory [...]

Leave document checked out after creation.

Cancel <Back Next> Finish

- **Template:** This is ALWAYS needed, even when all you want is a blank page. Click the ellipsis button [...] to open a search window for the full list of templates.
- **Type:** Would normally be 'Correspondence'
- **Addressee:** Select the name of the person you are writing to from the list of known associated contacts. The person's standard salutation will automatically be entered in the 'Salutation field'. The system will automatically populate the 'Addressee' and 'Salutation' fields with suggested text, but you can manually adjust this if you wish.
- **Address:** Select an address to use on the letter, from the list of known addresses in the database.
- **From:** This normally defaults to your name (as the creator of the document). You can opt to override this and select the name of any member of staff by clicking the ellipsis button.
- **Signatory:** This is the name of the SIGNATORY of the letter (if different from yours). You can select a name by clicking the ellipsis button.
- **Leave document checked out:** Leave this ticked.

The 'Profile' form then appears – it is used to confirm or change the metadata that will be stored about the document.

Click the 'Next' button

Review (and adjust) the Filing Details page as needed

The Filing Details screen describes how the document will be filed by CCH Central once it has been created.

The screenshot shows a software window titled "Document Creation Wizard" with a sub-header "Step 2 of 2: Enter Filing details". There are two tabs: "Addressee" and "Filing Details", with "Filing Details" being the active tab. The form contains the following fields:

- Library: Client Filing (dropdown)
- Contact: African Wildlife Trust (text input)
- Assignment: None (dropdown)
- Job: None (dropdown)
- Expires: / / (dropdown)
- Description: (empty text input)
- Key Words: (empty text input)
- Extra Details: A table with columns "Name" and "Value".

Name	Value
Industry Type	
Review Needed	
Final Version	

At the bottom, there are four buttons: "Cancel", "<Back", "Next>", and "Finish".

- **Library:** Should normally be 'Client Filing'
- **Contact:** Should already be completed with the client's name
- **Assignment:** Select or edit the VPM Assignment (if appropriate) against which this document should be recorded.
- **Job:** Select or edit the VPM Job (if appropriate) against which the document should be recorded.
- **Description:** Enter a brief description of the document. This description will be displayed on search results when users are looking for the document in the future.

GOOD DESCRIPTION = 'Letter re planning for 2010 audit'

BAD DESCRIPTION = 'Letter to client'

Click 'Finish' to create the new document and launch Microsoft Word, ready for editing.

Note: The instant you click 'Finish', the document is created, named and saved to the practice filing system – every other user in the practice will be able to see it but will not be allowed to change or delete it.

STAGE THREE – FINALISE THE DOCUMENT

When you are happy with the document, print it out in the usual way for review and signature. Finally, the document should be 'Checked In' to the Document Manager.

In Word 2007, click the 'CCH Document Management' tab and click 'Check in Document'



The document will be saved to the Document Management system and checked-in. Once checked-in, the document is fully accessible by everyone else.

GENERAL NOTES

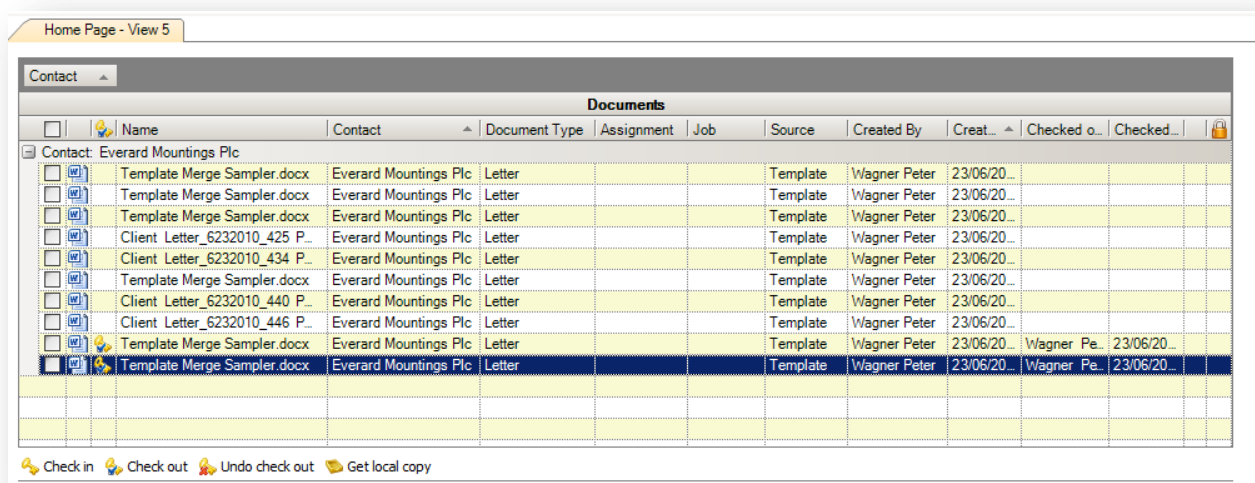
- When a document is 'Checked Out', everyone else can still see the document on their screens, but cannot edit it or delete it. If they open it (by double-clicking) they will see the previous version of the document. You MUST check-in a document once you have completed working on it.
- Every time you 'check-out' a document, you create a new version of it. All previous versions are kept by the system indefinitely. You can access a full history of all prior versions at any time, and even open an earlier version and 'revert' back to it if you made a hash of things!
- If you select 'Edit' in the task bar, the software will perform a check-out and launch the document, all in one action.
- The 'Create Document' option currently only works for Microsoft Word documents. If you need to create an Excel spreadsheet or PowerPoint presentation, you should open the appropriate software directly, and then use the special 'CCH Document' tab to save it to the filing system.

USER NOTE – FINDING DOCUMENTS

When looking for a document in the system – the trick is to know WHICH of several search methods will be the best place to look for ‘your’ document. It may be shown in several different places in the system, or only one.

IF YOU ACCESSED OR WORKED ON IT RECENTLY (IN THE LAST WEEK OR SO)

Click on your ‘My Documents’ shortcut in Central to display the document home page controls.



	Name	Contact	Document Type	Assignment	Job	Source	Created By	Creat...	Checked o...	Checked...
Contact: Everard Mountings Plc										
<input type="checkbox"/>	Template Merge Sampler.docx	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...		
<input type="checkbox"/>	Template Merge Sampler.docx	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...		
<input type="checkbox"/>	Template Merge Sampler.docx	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...		
<input type="checkbox"/>	Client Letter_6232010_425 P...	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...		
<input type="checkbox"/>	Client Letter_6232010_434 P...	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...		
<input type="checkbox"/>	Template Merge Sampler.docx	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...		
<input type="checkbox"/>	Client Letter_6232010_440 P...	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...		
<input type="checkbox"/>	Client Letter_6232010_446 P...	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...		
<input type="checkbox"/>	Template Merge Sampler.docx	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...	Wagner Pe...	23/06/20...
<input type="checkbox"/>	Template Merge Sampler.docx	Everard Mountings Plc	Letter			Template	Wagner Peter	23/06/20...	Wagner Pe...	23/06/20...

The ‘Recent Documents’ list shows you all documents you have worked on recently.

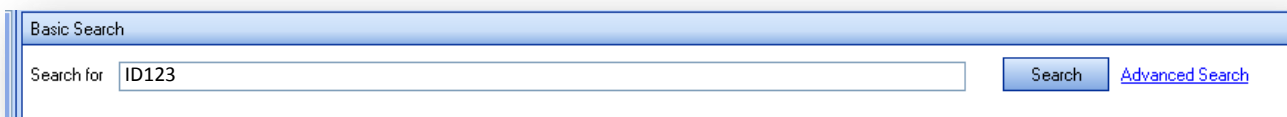
- To view the document – double-click on the documents name.

IF YOU KNOW THE DOCUMENT ID NUMBER

THIS IS THE FASTEST AND MOST RELIABLE WAY TO RETRIEVE A DOCUMENT

Every document is assigned a unique ID number that never changes. If you know this number, then you can retrieve the document in a matter of seconds. **The document ID will be quoted as the final segment of the ‘Our Ref’ code on all outbound correspondence.**

1. Within Central click on the ‘Document Centre’ button on the top toolbar.
2. Enter ‘IDxxx’ in the search box, where ‘xxx’ is the document id that you are looking for.



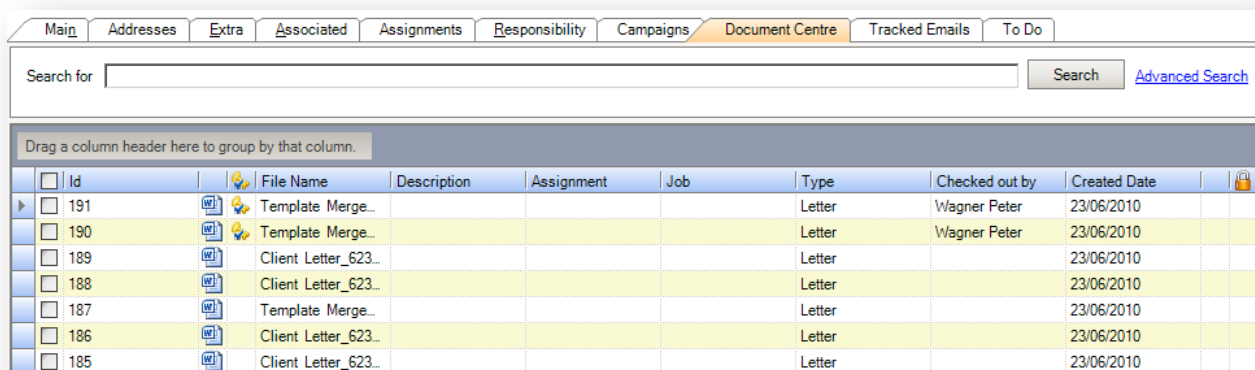
Basic Search

Search for [Advanced Search](#)

IF YOU KNOW THE CLIENT THAT THE DOCUMENT BELONGS TO...

In the absence of the Document ID – your next best option is to access the client filing.

1. In Central, **click the 'Clients'** button on the toolbar and perform a search on either client name or client code in the usual way.
2. **Double-click on the appropriate client** to open the client screen and **click on the 'Document Centre'** tab.



The screenshot shows the 'Document Centre' tab selected in a software interface. At the top, there are navigation tabs: Main, Addresses, Extra, Associated, Assignments, Responsibility, Campaigns, Document Centre (highlighted), Tracked Emails, and To Do. Below the tabs is a search bar with the text 'Search for' and a 'Search' button, along with a link to 'Advanced Search'. A grouping bar below the search bar contains the text 'Drag a column header here to group by that column.' Below this is a table with the following columns: Id, File Name, Description, Assignment, Job, Type, Checked out by, and Created Date. The table contains seven rows of data, all with a 'Created Date' of 23/06/2010. The first two rows are 'Template Merge...' documents, and the remaining five are 'Client Letter_623...' documents.

Id	File Name	Description	Assignment	Job	Type	Checked out by	Created Date
191	Template Merge...				Letter	Wagner Peter	23/06/2010
190	Template Merge...				Letter	Wagner Peter	23/06/2010
189	Client Letter_623...				Letter		23/06/2010
188	Client Letter_623...				Letter		23/06/2010
187	Template Merge...				Letter		23/06/2010
186	Client Letter_623...				Letter		23/06/2010
185	Client Letter_623...				Letter		23/06/2010

The system will display a list of recent documents filed against this client.

You can manipulate the list in various ways:

- Click the column headings to choose different sorting options
- Drag column headings into the grouping bar to organise the documents into groups

You can also opt to display the list of documents in three different ways:

- List View – The standard textual view, showing a document per line in lists
- Icon View – A screen of large icons
- Flow View – A visual 'browse' of the documents – showing a thumbnail image of the front page of each document.

SIMPLE SEARCHING

CCH Document Manager stores a range of data about each document in its database. You can enter search criteria to extract lists of matching documents from the system.

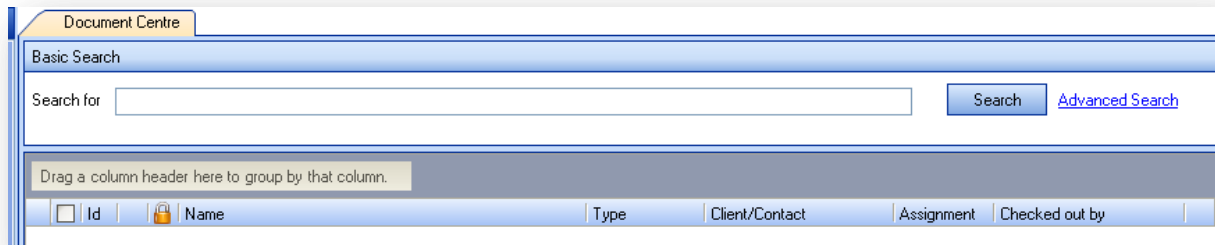
This approach is best used when:

- You are not looking for a particular document, but rather want to find any and all documents that relate to a particular subject (effectively using the filing system as a knowledgebase).
- You ARE looking for a particular document, but you have exhausted the 'browse' search options (maybe because the document is very old, or has been mis-filed or you cannot recall even the client code number)

Open the Document Centre and search by entering text into the 'Search for' field and clicking the Search button.

If you use the main Document Centre button on the toolbar, your searches will operate across ALL clients.

If you use the Document Centre tab in a client or assignment screen, the search will be confined to that client or assignment.



The system will find (and display) all documents where the entered text can be found in:

- The document's file name
- The document's description (as entered during profiling)
- The textual contents of the document itself

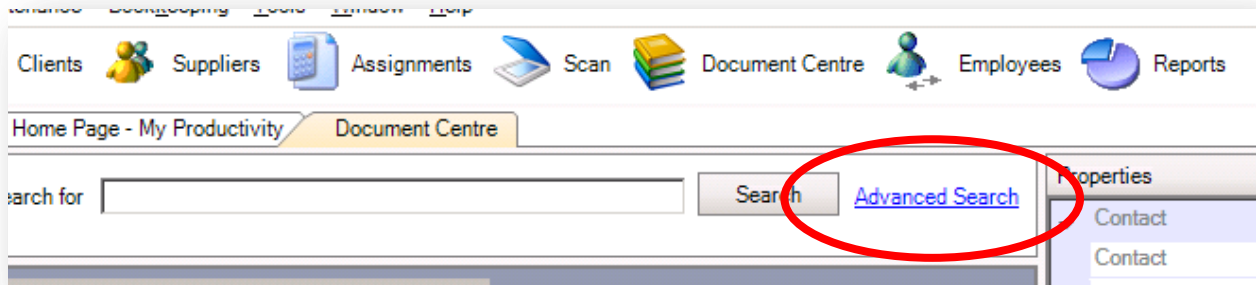
In the 'Search for' field – enter the word or phrase that you are looking for and click 'Search'.

- You can search for any word except those regarded as 'noise' (*a, an, and, as, of*, and other common words) which are ignored by the system
- Punctuation marks are ignored
- Scanned documents ARE searchable – but only if the text is legible – handwritten documents cannot be searched

ADVANCED SEARCHING

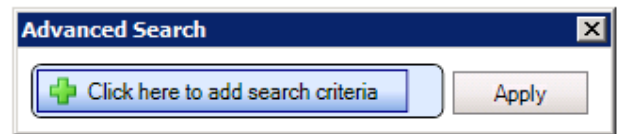
Advanced search offers you the option to enter a whole range of search criteria to help you locate a particular set of documents.

In the Document Centre, click on the 'Advanced Search' link....

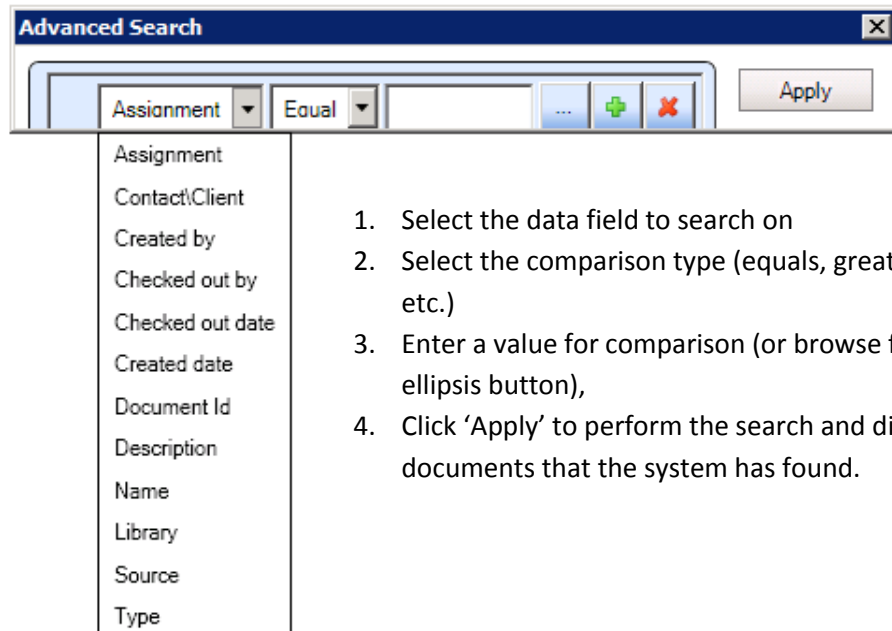


The system will open the 'Advanced Search' window:

(If you click 'Apply' straight away, the system will return a list of EVERY document in the system).



To add search criteria, click the 'Click here to add search criteria' button.



1. Select the data field to search on
2. Select the comparison type (equals, greater than, less than, etc.)
3. Enter a value for comparison (or browse for a value with the ellipsis button),
4. Click 'Apply' to perform the search and display all the documents that the system has found.

You can apply multiple criteria simultaneously by using the green '+' button to add another row...

SAVING YOUR SEARCHES

If you find yourself regularly searching for the same types of document, then you can save the search-settings into a personal 'library' of searches that can be recalled quickly for re-use.

While your search is on-screen, click the 'Save Search' link on the task bar. You will need to give the search a name and a description.

To use the saved search, you need to be in a 'Document Centre' screen (Either the main one, or the client/assignment Document Centre tabs). Click the 'Apply Search' link and the system will pop up a list of your saved searches to choose from.

- Saved searches are personal to you. Other people cannot see or use your saved searches.
- A saved search stores the criteria, not the previous set of results, so each time you use a saved search, the results may differ (reflecting recent changes and additions).
- A saved search can be used in ANY Document Centre screen, regardless of where it was created.