



Setting up Collaborate

Discover new ways to work with your team and clients

Use co-edit to collaborate with your team and clients, share documents securely, and deliver exceptional service.

- ✓ Overview of Collaborate
- ✓ Collaboration Tools for Your Practice
- ✓ Setting up Collaborate
- ✓ Configuring your Collaborate Settings

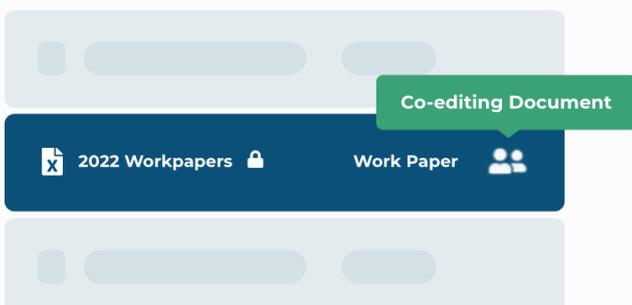


Overview of Collaborate Pro Plan feature

Co-editing Documents

Co-edit allows more than one internal user to work on a document at the same time. This allows team members to work together on the same document, wherever they are located.

As well as co-editing internal documents with your team, you can share documents with your client as 'Co-edit with Client'. This gives your client edit access to the document and also allows team members to work on the document at the same time.



Sharing Documents and Folders with Clients Securely

Share documents and folders with clients using FYI's integration with OneDrive – there is no need for your team to send sensitive documents via email.

Easily manage access to shared documents and folders.

Upload Folders for External Users

The Upload Folder provides an alternate way for clients to send documents to your practice instead of sending documents by email. For example clients can upload documents such as bank statements or tax receipts.

Your client's uploaded documents are automatically filed and your team can be notified when documents are received using a process automation.

Collaboration Tools for Your Practice

Understanding the Collaborate tools available to your practice

A summary of FYI's Collaborate tools are outlined below.

Follow this guide to take advantage of all aspects of Collaborate. Should you prefer to get started with a specific feature first, follow the steps outlined in the table to ensure your team is set up and ready to go.

- Co-edit documents with your team.**
Allow more than one internal user to work on a document at the same time.
- Co-edit documents with your client.**
Give your clients edit access to documents and allow team members to work on documents at the same time.
- Sharing documents with your clients.**
Securely send documents via OneDrive. External users include clients, their employees, their business contacts or to any other user who requires access.
- Sharing your client's share folder.**
Share your relevant client's OneDrive Share Folder with a client, any contacts recorded for the client in your practice management software, or any other guest user who needs access to the documents within the folder.
- Receiving documents from clients using the upload folder.**
The upload folder provides an alternate way for clients to send documents to the practice instead of sending documents by email.
- Managing access to the shared documents.**
You can remove access to specific documents so the client cannot access them (for example if an incorrect document was shared).
- Managing access to the share folder and upload folder.**
You can remove access to the share folder and the upload folder for all users or for a specific user at any time.

Setting up Collaborate				Configuring your Collaborate settings				
Step 1	Step 2	Step 3	Step 4	Step 1	Step 2	Step 3	Step 4	Step 5
✓	✓			✓	✓	✓		✓
✓	✓			✓	✓	✓		✓
✓	✓	✓	✓	✓	✓	✓	✓	
							✓	✓

Managing access to shared documents and folders is only relevant if utilising co-edit or share with client features.

These steps can be re-visited at any time.

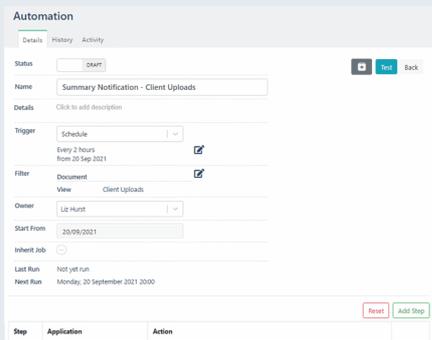
Tips!

Set up a custom process to notify team members that documents have been received from your clients.

[Refer to Client Upload Notification](#)

Is your practice integrated with myprosperity? Leverage your myprosperity integration to send documents to your clients.

[Learn more about Sharing Documents via myprosperity](#)



Setting up Collaborate

Step 1: Select the OneDrive admin account

Your practice must select the OneDrive account that will be used as the central location for the Collaborate activities across your practice. Activities include co-editing documents, sharing documents and folders, and receiving documents from clients.

We recommend setting up a Microsoft 365 account specifically for this. Set this up with a name to represent your practice, rather than a specific person. Also ensure this account has OneDrive enabled. You can then set up a user directly in FYI that relates to this Microsoft 365 account.

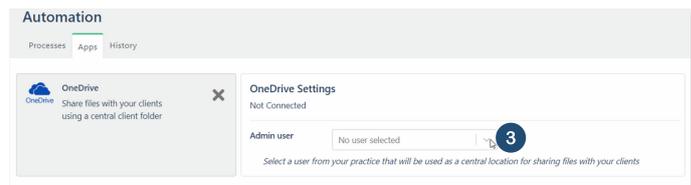
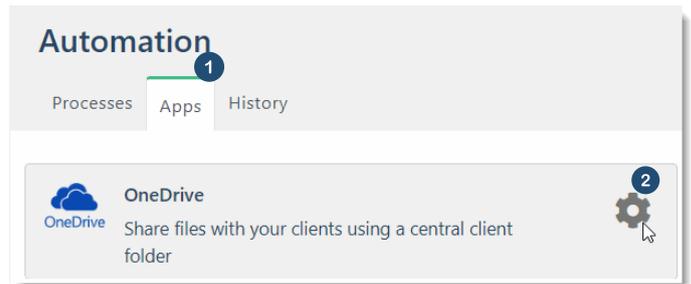
For example admin@yourpractice.com or info@yourpractice.com

[Learn more about the OneDrive Admin Account](#)

To link your practice's OneDrive admin account:

- 1 Select the Automation menu option and go to the Apps tab.
- 2 Locate the OneDrive tile and click the cog icon to edit it.
- 3 In the OneDrive Settings, select the OneDrive Admin user from the drop-down.

Note: This account must be set up as an FYI user and logged into FYI at least once.



Step 2: Ensure external sharing is turned on

You may need to ask your IT Specialist to assist with this step.

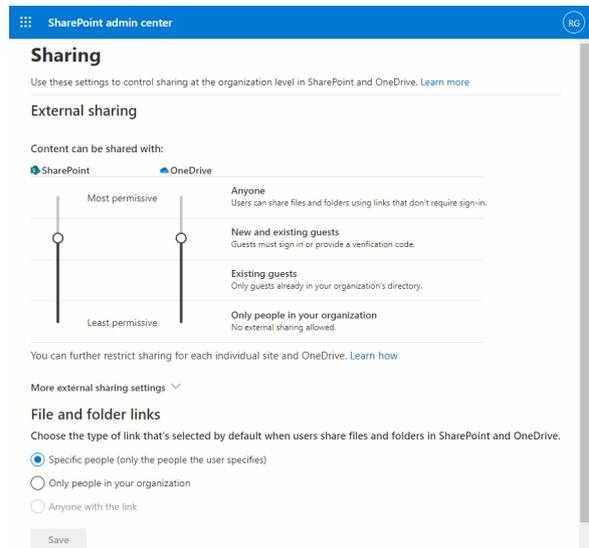
In the SharePoint Admin Center for the Microsoft 365 account for your practice, the External Sharing and File and Folder Links must be reviewed. If not set correctly, this can prevent secure links being created by FYI or existing links to be inactive. The Microsoft 365 account for your practice can only be accessed by a Microsoft 365 administrator.

Go to Microsoft 365 and open your SharePoint Admin Centre. Use this [link](#) to take you directly there.

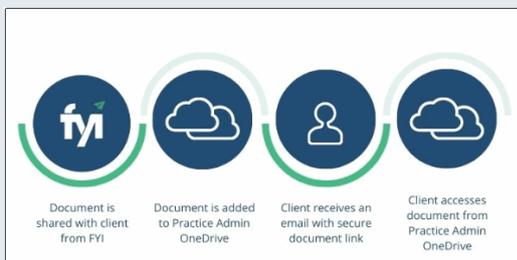
Review the External Sharing levels. This must be set to 'Anyone' or 'New and existing guests'.

Review the File and Folder Links.

[Refer to the Microsoft help article Manage sharing settings in Microsoft 365](#)



Sharing documents with your client



Sharing the upload folder with your client



Setting up Collaborate

Step 3: Setting up the email templates

When documents and folders are initially shared with a client, an email is created for the relevant recipients. The email contains links to the documents or folders, and requires a simple verification process.

Set up your email templates and include the required merge fields to add the correct links to your emails when sharing documents or folders:

Sharing Documents Email Template

Must include the Attachments Link merge field.

This merge field is located in the OTHER group of merge fields and looks like this once added to your template:

```
{{ AttachmentLinks }}
```

Sharing Folders Email Template

Must include the Share Folder Link and Upload Folder Link merge fields.

These Merge Fields are also located in the OTHER group and look like this once added to your template:

```
{{ ShareFolderLink | web_link }}  
{{ UploadFolderLink | web_link }}
```

The email templates can also be used if the links need to be resent.

Important notes

- You can add any additional text to your email template
- If you have a default email signature, this will be added to the email that is sent to your client
- You may decide to send a separate email with instructions on how to use the folders, or you can include this information in your email template. Here are some samples to get you started:
[Introducing shared documents](#)
[Introducing shared folders](#)

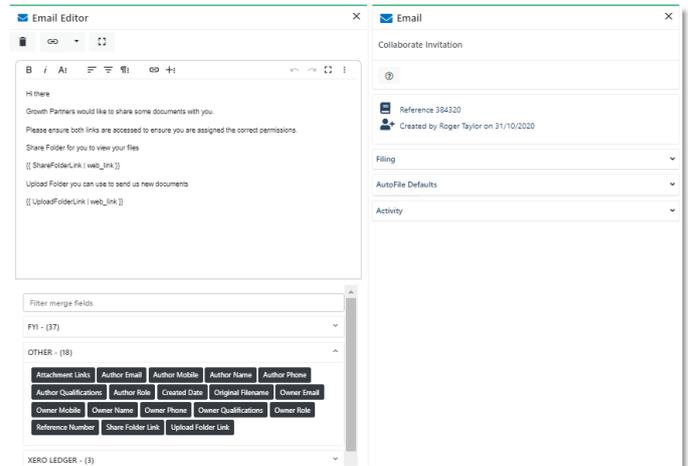
Step 4: Setting up permissions for share settings

OneDrive folders can only be shared with a client by an FYI Admin, or a user in a user group that has permissions enabled for Share Settings.

- 1 Set the Share settings permission to "On" for the relevant User Group in FYI.

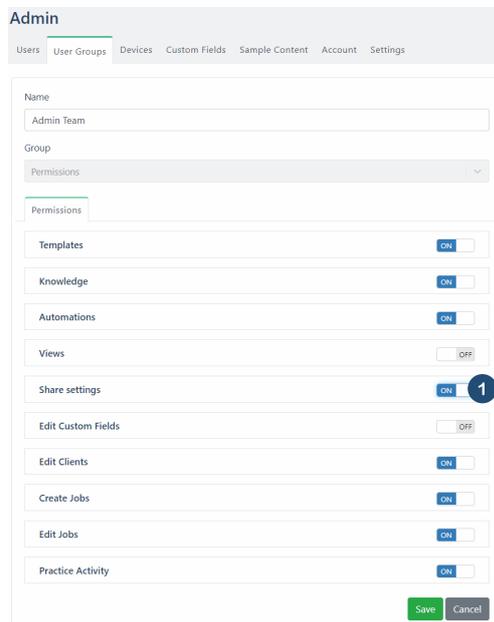
Users in that User Group will have access to the Sharing Settings in the Client - Collaborate tab.

The Collaborate Tab in the Client workspace provides visibility to your team to all documents that have been shared with a specific client via OneDrive.



“
Having a secure space that clients can drop documents into is fantastic and far more secure than email, so it provides clients with peace of mind.
”

ABBY ACUTT
CLIENT SERVICES MANAGER
@ G J WALSH & CO



Configuring Collaborate Settings

Step 1: Configure practice settings

Before using the FYI Collaborate tools, it is important to assign the practice default settings and create the filing structure for the folders that FYI automatically maintains on your practice's OneDrive.

Select the **Automation** menu option and go to the **Apps** tab.

1 Locate the **Collaborate** tile and click the cog icon to edit.

2 Go to the **Settings** tab.

Note: If you see a message "Please select a OneDrive admin from OneDrive app" this indicates that you have not yet set up the account for your practice's OneDrive. Revisit Step 1 in Setting up Collaborate.

3 Select the **Default Email Template** that you created in the third step of Setting up Collaborate.

Click **Save**.

4 Edit the **Automation - Collaborate** tile again and assign a **Microsoft Group Name**.

You may need to ask your IT Specialist to assist with this step.

This group will be the default security group assigned to all sub-folders in the OneDrive FYI - Co-Edits folder. This folder is used for internal Co-editing of documents. If following our recommended settings, this sub-folder will be your practice's cabinets.

Using Office 365 groups, you will need to set up a Microsoft Group for all of your users that will have access to Co-edit. This enables access for users without having to add and remove users individually.

[Learn about Microsoft 365 Groups](#)

To add a Microsoft group, type the group email address or group name.

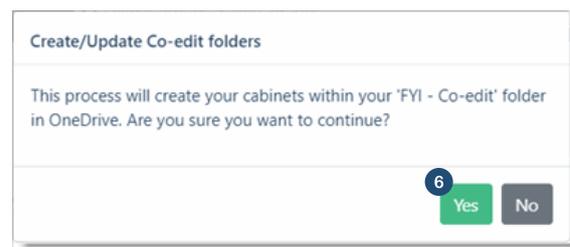
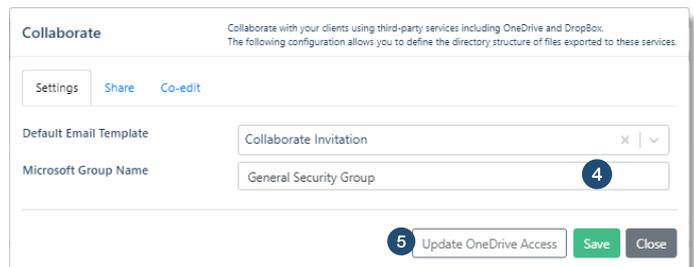
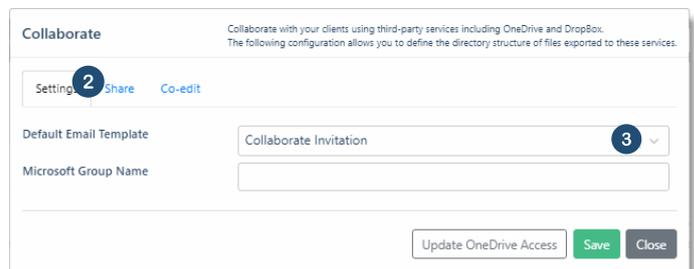
Note: If the group is a Microsoft 365 group, the group email address must be entered and not the name. If the group is a Microsoft Security group, the name can be entered.

5 Then click the **Update OneDrive Access** button.

6 Click **Yes** to confirm.

This creates the FYI - Co-Edits folders in the designated OneDrive, creates each Cabinet and assigns the Microsoft Group to each Cabinet.

A message displays that the Cabinet folders have been updated.



Important notes

- To change your Microsoft Group, add a new group email address or group name and click **Update OneDrive Access**. This will automatically deploy the new group to the FYI - Co-Edits folder and override any custom direct access permissions for secure cabinets.
- If you do not select a Microsoft Group, and leave this empty, this will create the folders without the additional security.
- For any new Cabinets created, the Microsoft group is not applied automatically. Permissions will need to be added to the folder in OneDrive directly.

Configuring Collaborate Settings

Note! Steps 2 & 3 are optional. A default share and co-edit structure is already set up. If you are happy with the default, you do not complete these steps.

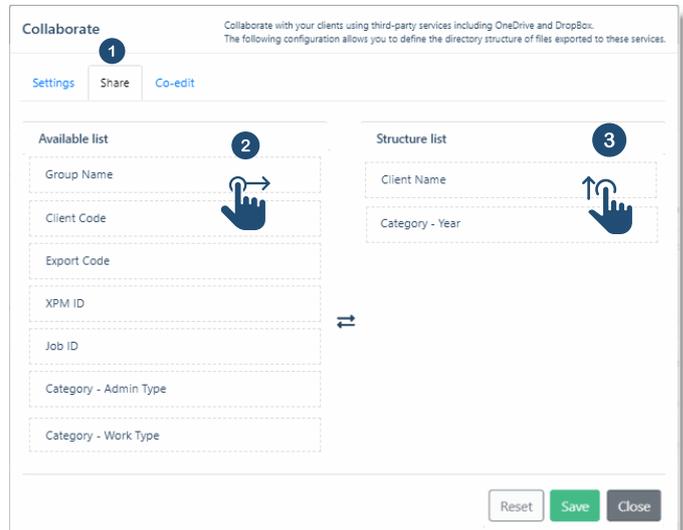
Step 2: Set up your share structure

Set up the Share folder structure that FYI will automatically use for all documents that are shared with external users. The Structure List represents the structure of the folders in your OneDrive FYI - Clients folder.

The Client Name must be the first level. This is set as the default.

- 1 Edit the Collaborate tile and go to the Share tab
- 2 From the Available List in the left-hand pane, select and drag the relevant list options to the Structure List in the right-hand pane
- 3 Then order the selections in the Structure List up and down by dragging and dropping the options to match the filing structure you require.

Click Save.



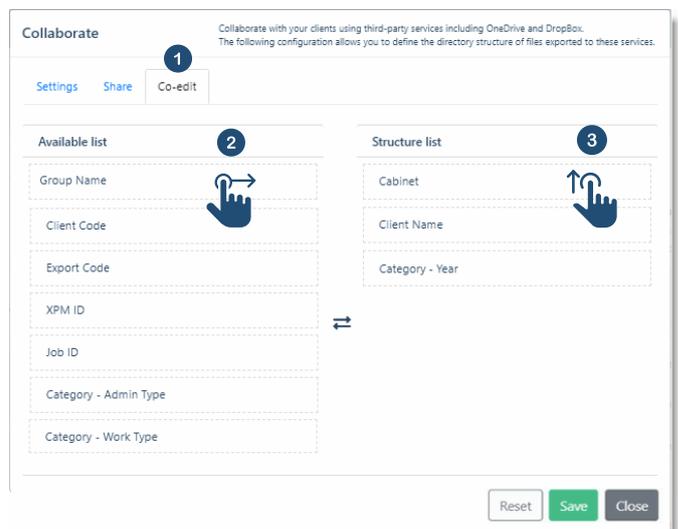
Step 3: Set up your co-edit structure

Set up the Co-edit folder structure that FYI will automatically use for all documents that are co-edited internally. The Structure List represents the structure of the folders in your OneDrive FYI - Co-Edits folder.

The Co-Edit folder structure must be set up with Cabinet as the first level. This is set as the default.

- 1 Edit the Collaborate tile and go to the Co-edit tab
- 2 From the Available List in the left-hand pane, select and drag the relevant list options to the Structure List in the right-hand pane
- 3 Then order the selections in the Structure List up and down by dragging and dropping the options to match the filing structure you require.

Click Save.

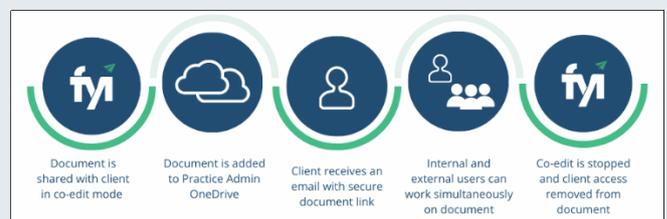


Note: If you do make changes to the share and co-edit structure, it is important that you go back to the Settings tab and click the Update OneDrive Access button and confirm your changes.

Important notes

- If a level in the filing structure does not exist in the filing details of a document, Collaborate will ignore this level and create the next level down.
- The Reset button will reset the structure list back to the default settings. It will not update your settings until you click Save.

Co-edit with your client



Configuring Collaborate Settings

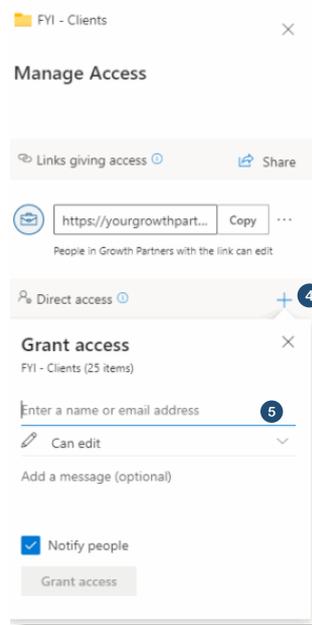
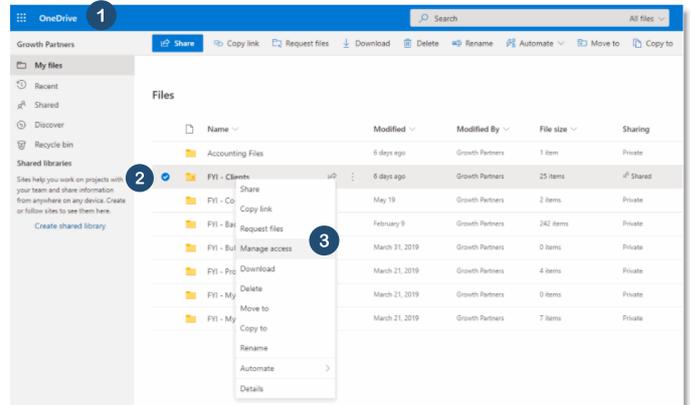
Step 4: Giving access to your team

To ensure that your team members have access to the documents shared with clients including the links that are generated, the OneDrive Admin Account user will need to give Direct Access to your team directly within OneDrive.

- 1 Go to your practice's OneDrive folder
- 2 Right click on the FYI-Clients folder
- 3 Select Manage access

The Manage Access pop-up displays

- 4 Click the + icon beside Direct Access
- 5 Enter the name of the user(s) or group that you are giving access to the folder



Important notes

- We recommend that practices utilise the functionality of Microsoft groups and create a broad group that includes all team members that require access. New team members can then be added to this group and they will automatically be granted access to the FYI - Clients folder.
- This is the same Microsoft group that was set up in Step 1.
- FYI Client Security settings do not sync to FYI - Clients folder in OneDrive. If you wish to set specific user security for clients we recommend that Direct Access is reviewed for these clients and updated accordingly on a user basis.

[Learn about Client Security](#)

Overview of OneDrive folder structure for Collaborate

OneDrive Folders	Function	Notes
<ul style="list-style-type: none"> Folder: FYI - Clients <ul style="list-style-type: none"> Folder: Client Name <ul style="list-style-type: none"> Folder: Sub-folders as per Share Structure 	Share documents with client Co-edit with client	Must have client name as the first level in share structure
<ul style="list-style-type: none"> Folder: FYI - Clients <ul style="list-style-type: none"> Folder: Client Name <ul style="list-style-type: none"> Folder: Sub-folders as per Share Structure Folder: Upload 	Share OneDrive share folder with client Share upload folder with client	Must have client name as the first level in share structure
<ul style="list-style-type: none"> Folder: FYI - Co-Edits <ul style="list-style-type: none"> Folder: Sub-folders as per Co-edit Structure 	Co-edit (internal documents)	Must have cabinet as the first level in co-edit structure

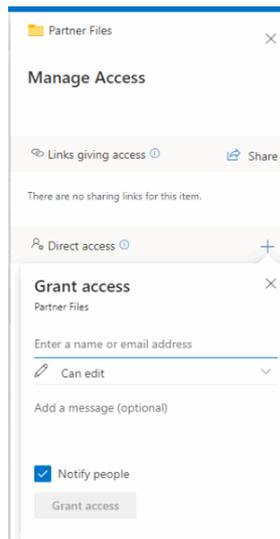
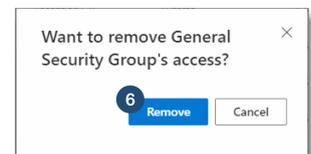
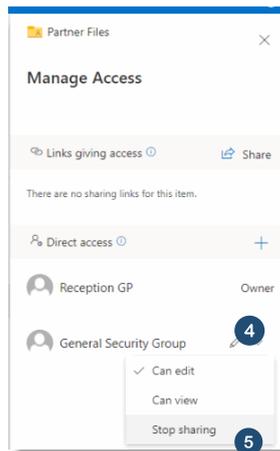
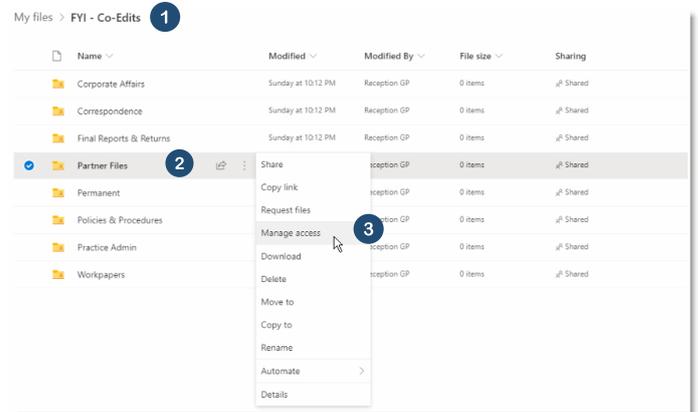
Configuring Collaborate Settings

Step 5: Updating direct access on secure cabinets

You can update security for which users can access which documents in FYI according to the Cabinet via the User Groups (refer to Managing User Groups).

This step is only required if your practice has security set on any Cabinets. Your practice OneDrive admin account user needs to login to OneDrive and update the direct access on the secure cabinets as follows.

- 1 Go to your practice's OneDrive folder and click on the FYI - Co-Edits folder
- 2 Right-click on a Cabinet folder that you want to set access for
- 3 Select Manage Access from the pop-up menu
The Manage Access pop-up displays
- 4 Under the Direct Access section, click the edit pencil icon for the relevant group.
- 5 Select Stop sharing
- 6 Click Remove when prompted to "Want to remove General Security Group's access"?
- 7 Still in the Manage Access section, click the + icon beside Direct Access and enter any new secure access group or specific users that can have access to the secure Cabinet.



Important notes

- For any new Cabinets created that need security access, the access is not applied automatically. Permissions will need to be added to the folder in OneDrive directly.

[Refer to Microsoft article - See who a file is shared with in OneDrive or SharePoint](#)

Discover new efficiencies. Together.

For more information on Collaborate, visit the FYI Help Centre at support.fyidocs.com