# Document Manager

Importing Documents into Document Manager

Document Manager allows you to import documents into your document management system via the **Import document** selection in the Task Bar. This action can be performed from a variety of areas within the system, including the **Find Clients** view and the Documents tab of a client.

How to import a document from the Find Documents view

1. Ensure that the **Find Documents** view or the Documents tab of the relevant client is displayed.

2. Click on **Import document** in the Add Documents menu on the Task Bar. The MYOB Document Manager Share It window is displayed.
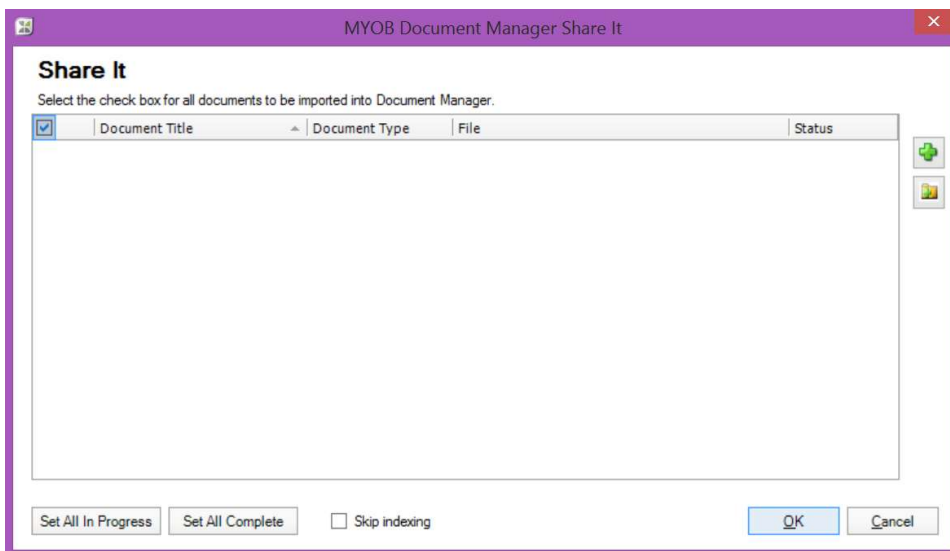
3. To import a single document, or a selection of individual documents from one or more locations, click on the Add Files button

   Or to import all the documents in a folder, click on the Add Files in Folder button.

   The Open or **Browse For** Folder window is displayed.

4. Navigate to the required document(s) or folder.

5. Click on the Open or the OK button.

   The selected document(s) or all the documents in the selected folder are listed in the MYOB Document Manager Share It window.

6. To de-select any of the documents in the list, un-tick the checkbox of the document(s) that you do not want to import.

   Note: The **Skip indexing** checkbox can be selected in situations where large numbers of documents are being imported at once, and the indexing process is completed as a separate task by an Administrator. It is recommended that this option remains unticked.

7. The **Set All In Progress** and **Set All Complete** buttons can be used to apply the appropriate status to the documents being imported. Alternatively, individual documents can be altered by clicking on the status and changing it.

   Note: Selection of **Set All In Progress** means that the relevant documents can still be edited after importation. Alternatively, if **Set All Complete** is chosen, it means that the documents cannot be edited. Careful consideration must be given to this selection.

8. Once you have confirmed the document(s) to import, click on the OK button.

   The Create Document Wizard window is displayed. You now need to complete the wizard using the usual procedure by selecting the relevant Profiling details. Once all documents have been profiled using the Create Document Wizard, they can be accessed from within the Document Manager system.

   Note: If multiple documents are imported, the same profile will be applied to all documents.

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