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Overview

MYOB Intranet provides a single, secure location for your practice tools, news, standard documents and other standard layouts. It allows easy access all your practice documents and items from a single location ensuring consistent, accurate, quality team work. You can use MYOB Intranet to quickly produce client letters, access practice standards and policies — even stay up-to-date with industry and practice news. MYOB Intranet and its administration functionality is integral to the operation of MYOB Document Manager as it provides the ability to configure:

- standard items
- stationery items
- categories
- team members and their roles.

Some of the key features of MYOB Intranet are:

- Offers full-text search for the fast retrieval of documents and tools.
- Allows you to create documents using client information from your practice management database.
- Manages and provides access to standard practice documents and other items to ensure high quality work.
- Allows you to configure your own structure for storing content.
- Frequently-used documents can be saved and quickly referenced as Favourites.
- Provides a knowledge base so that you can share information and knowledge across the practice.

The documents in MYOB Intranet are integrated with one of the practice management systems: MYOB AO Classic, MYOB Accountants Enterprise (MYOB AE), MYOB Accountants Office (MYOB AO) or MYOB Profiles. This allows client letters to be produced efficiently and accurately by automatically displaying client details.

You can use your own practice standard items in MYOB Intranet or you can use those available in other services. You can also store procedural documents, such as job responsibilities and key tasks by role (e.g., receptionist, manager, administrator).

MYOB Intranet not only manages your practice master documents, it can also be used to share other information. For example, you may want to build your own practice library, where you store general industry news, as well as practice-specific information. This could include:

- Practice news – to keep everyone up-to-date with what is happening in the practice.
- Newsletters – industry updates from professional associations and other groups.
- Software suppliers – updates and bulletins regarding software and technology.
- Tax office correspondence – a central repository for all tax office updates and correspondence.
- Web links – useful practice-wide favourites for all users.

New content can only be added to MYOB Intranet by an administrator of the system. The master documents only need to be updated once and in one location. This ensures there is only one version of an item available. All items referenced in MYOB Intranet are stored in user-defined categories or directories. This means you can set up and tailor the categories to suit your practice or individual teams.

Related topics

[Accessing MYOB Intranet](#)

[MYOB Intranet window](#)

[Using MYOB Intranet](#)

Accessing MYOB Intranet

MYOB Intranet is used in the same way regardless of how it is accessed.

You can access MYOB Intranet from any of the following:

Microsoft Outlook

Depending on the installation options selected, MYOB Intranet can be the default view when opening Microsoft Outlook.

To easily re-display the MYOB Intranet window at any time from Microsoft Outlook, click the **MYOB Intranet** button in the toolbar at the top of the Outlook window. This toolbar is also available when using the other functions in Microsoft Outlook, such as Mail, Calendar, etc.

If the MYOB Intranet button is not displayed at the top of your Outlook window, see “MYOB Intranet Outlook toolbar” on page 10 for information on how to display this.

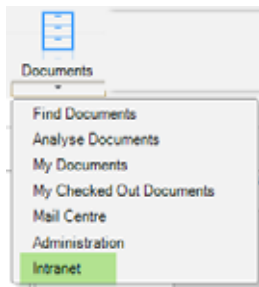
Note: To exit MYOB Intranet, close the Microsoft Outlook window or select File > **Exit**.

Network Login

When you first access MYOB Intranet, the system checks whether you have been configured as a team member. Your network login is used as the identifier. If you have not been configured as a team member, you will be automatically set up using your network login as your user name.

MYOB AE/AO

If you are using MYOB Intranet with MYOB AE/AO, click the drop-down arrow on the **Document** icon on the toolbar, then select **Intranet**.



Accessing from the other applications

The MYOB Intranet home page is an HTML page. To access MYOB Intranet from Microsoft Internet Explorer or MYOB AO Classic, you have to set MYOB Intranet as your homepage in these applications.

You will need to include the correct location (e.g., res://C:\Program%20Files\MYOB\Intranet\MYOBToday.dll/home.htm). Check with your MYOB Intranet administrator if you need help with the location or with how to set a home page in the application itself.

Start menu

The MYOB Intranet home page is an HTML page. To access MYOB Intranet from the Start menu navigate to Start > Programs > MYOB > **MYOB Intranet**.

Related topics

[Overview](#)

[MYOB Intranet window](#)

[Using MYOB Intranet](#)

MYOB Intranet window

When you start MYOB Intranet, a homepage will display initially. From this, you select the items you want to look at.

The MYOB Intranet window is made up of the following components:

- “Left-hand menu” (see page 6)
- “Item view” (see page 7)
- “Navigation bar” (see page 9)
- “MYOB Intranet buttons” (see page 10)
- “MYOB Intranet Outlook toolbar” (see page 10).

Related topics

[Applications section in the left-hand menu](#)

[Online help in MYOB Intranet](#)

Left-hand menu

The menu on the left-hand side of the **MYOB Intranet** window lists **categories**. These group and categorise the information and enable access to the content in MYOB Intranet. The types of categories that are shown, the order in which they display in the menu and the content can be customised for your own business.

An item can be made available to any number of categories so it may appear in more than one category.

Multi-level categories

Any category can have more than one level. This allows the items to be grouped into sub-categories. Where there is another level, you will see an arrow adjacent to the category name. Place your cursor on a category to display its sub-categories.

Items can be held at any of the levels in the categories. When you click a category at any level, the items held in that category display in the “Item view” on page 7 to the right of the left-hand menu.

There can be any mix of items within a category. For example, a category may contain a mix of letters, spreadsheets, checklists, presentations as well as web links.

Alternatively, and depending on how the structure has been set up for your own business, you may access specific types of documents from specific categories. For example, you may access letters from a category named Letters, checklists from the Checklists category, etc.

Security in categories

Security can be applied to categories to restrict access to certain team members. This means that you only see those categories for which you have access. This can be based on the role you have been assigned within MYOB Intranet. You may also see a **By Role** category that contains items categorised by who has access to them. This enables staff members to see the content that is relevant to the roles that have been defined by your MYOB Intranet administrator.

Related topics

[MYOB Intranet window](#)

[Applications section in the left-hand menu](#)

[Item view](#)

[Navigation bar](#)

[MYOB Intranet buttons](#)

[MYOB Intranet Outlook toolbar](#)

[Online help in MYOB Intranet](#)

Applications section in the left-hand menu

The “Applications section” on page 21 in the left-hand menu is a special category that contains links to applications used by your business. This offers easy access to the applications used by your business. Depending on how this has been configured by your MYOB Intranet administrator, the applications may be grouped into categories. You may only see the applications that you have been given access to.

Click an application to launch it directly from the shortcut in MYOB Intranet.

Additional links can be added for those applications used solely by you. See “User applications” on page 21.

Related topics

[MYOB Intranet window](#)

[Left-hand menu](#)

[Item view](#)

[Navigation bar](#)

[MYOB Intranet buttons](#)

[MYOB Intranet Outlook toolbar](#)

[User applications](#)

[Online help in MYOB Intranet](#)

Item view

When you select a category to which items have been added, the items display in the Item View. Results are displayed in alphabetic order based on the title.






There can be a variety of items within a category. For example, it can contain documents (i.e., letters, spreadsheets, checklists, presentations) and also web links. The way in which the items are used will depend on what has been set up for your own business. For example, a News Category could contain documents or it could contain a Microsoft PowerPoint presentation with photographs from a company event or it could contain a list of web links.

The number of items in the view displays in the top right-hand corner of the view.

Item information

For each item, the following information is displayed. This information is configured by your MYOB Intranet administrator when items are added to MYOB Intranet.

Item information	Description
Title	A brief title of the item.

Item information	Description
Description	A brief description of the item.
Publisher	Name of the person or organisation from where the item originated. As well as MYOB Intranet staff members, this can also be organisations such as the tax office, MYOB or Bentleys. The date and time it was added to MYOB Intranet or last updated is also shown.
Keywords	Any keywords used to further identify the item. These are used in “Searching” on page 17 and “Advanced search” on page 18.
Application icon	An icon displays next to the Title to show the associated application. The following are examples of the icons you may see. These may display differently depending on the version of the application you have installed.  Microsoft Word  Microsoft Excel  Microsoft Internet Explorer — web link
New icon	You will see the New  icon next to any items that you have not yet opened. Once you have opened the item, the icon no longer displays.
Editable icon	An item will normally open as ‘Read Only’ so you cannot overwrite the original file. If it is editable, an Editable  icon displays in the Item View. See “Opening an item” on page 16.

Open Document, Add to Favourites

The following options available when you right-click an item on the Item View:

- “Opening an item” (see page 16)
- “Favourites” (see page 20).

Related topics

[Opening an item](#)

-
- [Searching](#)
 - [Advanced search](#)
 - [Favourites](#)
 - [MYOB Intranet window](#)
 - [Left-hand menu](#)
 - [Navigation bar](#)
 - [MYOB Intranet buttons](#)
 - [MYOB Intranet Outlook toolbar](#)
 - [Online help in MYOB Intranet](#)

Navigation bar

The **navigation bar** at the top of the **MYOB Intranet** window contains the following options.

Option	Description
Administration link	MYOB Intranet Administration will only be displayed if you have been configured as an administrator. Clicking the Administration link prompts you to login as an administrator before displaying the MYOB Intranet Administration window.
My Applications link	The “Applications section” on page 21 in the left-hand menu contains applications that have been added by your MYOB Intranet administrator. The My Applications link allows you to add additional links to applications for your own use. These display in a separate User Applications sub-section within the Applications section.
Help link	This link enables you to access MYOB Intranet online help.
Search field	The “Searching” on page 17 field enables you perform a simple search for a word or phrase. Enter the search criteria and click the magnifying glass icon. The search results are displayed in the view.
Advanced Search link	Clicking the “Advanced search” on page 18 link displays a separate window with filters that can be applied when searching for information in MYOB Intranet.

Related topics

- [MYOB Intranet window](#)
- [Left-hand menu](#)
- [Item view](#)

-
- [MYOB Intranet buttons](#)
 - [MYOB Intranet Outlook toolbar](#)
 - [User applications](#)
 - [Online help in MYOB Intranet](#)

MYOB Intranet buttons

The following buttons in the top right hand corner of the **MYOB Intranet** window enable easy access to special views of the content.

Button	Description
Favourites	Click the Favourites button to display the items that you have added as your favourites. See “Favourites” on page 20.
Recently Used	Click the Recently Used button to view the 20 most recently used item.
Team	Click the Team button to display the names and contact details of all users of MYOB Intranet in your organisation. From this view you can select a name to email that staff member. See “Team lists” on page 19.
What's New	Click the What's New button to display all new items that you have not yet opened. Once an item is opened, it no longer displays in the What's New view.

Related topics

- [MYOB Intranet window](#)
- [Left-hand menu](#)
- [Item view](#)
- [Navigation bar](#)
- [MYOB Intranet Outlook toolbar](#)
- [User applications](#)
- [Online help in MYOB Intranet](#)

MYOB Intranet Outlook toolbar

The MYOB Intranet Outlook toolbar is only displayed when using MYOB Intranet from Microsoft Outlook. The toolbar is found at the top of the window.

The buttons within the toolbar allow you to quickly refresh or re-display MYOB Intranet or to use functions such as the Favourites or Intranet Search. This toolbar is

also available when another Outlook window is displayed so that MYOB Intranet can be easily accessed from other windows.

Intranet Outlook toolbar buttons

Button	Description
MYOB Intranet	Re-displays the MYOB Intranet window, e.g., when any other Outlook window is displayed. This also refreshes the MYOB Intranet views, e.g., to display a new item that has been added in the administration since you opened the view.
Open Template Categories	This is the drop-down arrow that displays next to the MYOB Intranet button in the Outlook toolbar. The categories that display are the same as those shown in the left-hand menu.
Favourites	Click the Favourites button to display the items that you have added as your favourites. See “Favourites” on page 20.
Intranet Search	You can use this to search for an item. This is the same as the “Searching” on page 17 field on the “Navigation bar” on page 9.
Toolbar Options	The button with the drop-down arrow (next to Intranet Search) can be used to select which toolbars are displayed. This is the same as selecting Customize from the Outlook toolbar.

To display the MYOB Intranet Outlook toolbar

If the MYOB Intranet Outlook toolbar is NOT displayed:

1. Right-click in the Outlook toolbar area or select View > **Toolbar**.
This displays a popup with a list of the toolbars that are available (e.g., Standard, Advanced, Web and MYOB Intranet).
2. Click **MYOB Intranet**.
The MYOB Intranet Outlook toolbar is displayed.

Related topics

[MYOB Intranet window](#)

[Left-hand menu](#)

[Item view](#)

[Navigation bar](#)

[MYOB Intranet buttons](#)

[User applications](#)
[Online help in MYOB Intranet](#)

Online help in MYOB Intranet

Online help can be accessed in a number of ways while using MYOB Intranet:

- Click the **Help** link (in the Navigation bar at the top of the **MYOB Intranet** window).
- To display the help from the **MYOB Intranet Administration** window, select Help > **MYOB Intranet Help**.

Related topics

[MYOB Intranet window](#)
[Left-hand menu](#)
[Item view](#)
[Navigation bar](#)
[MYOB Intranet buttons](#)
[MYOB Intranet Outlook toolbar](#)
[User applications](#)
[Using MYOB Intranet](#)

Using MYOB Intranet

A variety of items can be held in MYOB Intranet, e.g., a document (for a letter, fax etc), a spreadsheet and a presentation. MYOB Intranet can be used to read information such as news items, policies and procedures. A new document, spreadsheet, presentation, etc. can be created using the configured standard templates.

Note: All the information that is available in MYOB Intranet is configured by the MYOB Intranet administrator. Items can be made available to all users of MYOB Intranet or they can be restricted to users with a certain role or position.

Accessing MYOB Intranet information

All information in MYOB Intranet is basically accessed in the same way:

1. Select an item. You can select:
 - directly from a view displayed with one of the categories in the menu
 - from one of the special views
 - from your Favourites
 - using Search. See “Locating and selecting an item” on page 14.
2. Right-click the item and select one of the following options:
 - “Opening an item” (see page 16)
 - “Favourites” (see page 20)

From the “Item view” on page 7, you can also use the following functions:

- Click an item that is a web link to open the web page in your browser. See “Opening a web link” on page 16.
- Add items to your “Favourites” on page 20.

Working with MYOB Intranet videos

Find/Save Information

```
<ac:structured-macro ac:macro-id="90530fcb-0955-4304-924d-6380def01d7f"
ac:name="html" ac:schema-version="1"><ac:plain-text-
body><![CDATA[<p>&nbsp;</p><iframe width="560" height="315" src="https://
www.youtube.com/embed/0Vqd4dACwVw?feature=player_detailpage"
frameborder="0" allowfullscreen></iframe>]]></ac:plain-text-body></
ac:structured-macro>
```

Intranet Applications

```
<ac:structured-macro ac:macro-id="90530fcb-0955-4304-924d-6380def01d7f"
ac:name="html" ac:schema-version="1"><ac:plain-text-
body><![CDATA[<p>&nbsp;</p><iframe width="560" height="315" src="https://
www.youtube.com/embed/zFzUwAij9P8?feature=player_detailpage"
frameborder="0" allowfullscreen></iframe>]]></ac:plain-text-body></
ac:structured-macro>
```

Related topics

[Locating and selecting an item](#)

[Procedure overview](#)

[Opening an item](#)

[Opening a web link](#)

[Favourites](#)

[Item view](#)

Procedure overview

A summary of the procedure for using the MYOB Intranet functions:

Locating and selecting an item

There are a variety of ways to locate an item. Each of these methods will display the view with a list of the relevant documents, spreadsheets, presentations, web links, etc.

- The “Left-hand menu” on page 6 contains all the categories and items that can be accessed. It displays the items that have been configured by your MYOB Intranet administrator. Click a category to display its sub-categories or to display the items it contains.

- Use the “Searching” on page 17 field in the navigation bar or the toolbar to find specific items. Click the magnifying glass button to display the items found in the Search Results. Click an item in the Search Results to open it.
- The “Advanced search” on page 18 in the navigation bar offers various other filters to help you search for items. An item can then be opened from the Search Results.
- Clicking the **Favourites** button in the “MYOB Intranet Outlook toolbar” on page 10 or **Favourites** in the “MYOB Intranet buttons” on page 10, displays the “Favourites” on page 20 view with the items that have been added as your favourites.
- The “MYOB Intranet buttons” on page 10 enable easy access to special views of the content.
- **Recently Used** displays a view with the 20 most recently used documents.
- **What's New** button displays a the items that have not yet been opened.

All of these methods display the relevant item(s) in the “Item view” on page 7.

Adding and opening a favourite

1. Locate and select an item.
See “Locating and selecting an item” on page 14.
2. Select **Add to Favourites** from the right-click menu.
A message displays ‘Document added to your favourites’.
See “Favourites” on page 20.

You can also easily access the document from the **Favourites** button in the “MYOB Intranet buttons” on page 10 or with the **Favourites** “MYOB Intranet buttons” on page 10.

Displaying and using the team list

1. Click the **Team** button that is part of the MYOB Intranet buttons.
The **Team List** displays. This shows the phone and mobile numbers of all users that have been configured for MYOB Intranet. See “Team lists” on page 19.
From the **Team List**, you can use **Search** to locate a team member. You can also select a name to send an email to that person.

Related topics

[Left-hand menu](#)

[Searching](#)

[Advanced search](#)

[Item view](#)

[Opening an item](#)

[Opening a web link](#)

[MYOB Intranet Outlook toolbar](#)

[MYOB Intranet buttons](#)

Opening an item

When an item is opened, a document or spreadsheet, etc, the system will launch the application in which it was originally created. If the item is a web link, the system will launch your browser to access the web address.

To open an item

1. Select the category that contains the relevant item.
2. Click the title of the item which displays as a hyperlink in the Item View.

or

Select **Open Document** from the right-click menu.

MYOB Intranet launches the application in which the item was originally created and opens the selected item. The item is opened as 'Read Only' so that the original file is not overwritten.

Read only items

An item will normally open as Read Only so that the original file cannot be overwritten. To make changes to a Read Only item, a new version of that item must be created using the versioning feature in Administration.

Editable items

If an item is editable, changes can be made to the item. When the item is saved, the original item is updated in the current location in MYOB Intranet. The master version of the item is saved.

If the **Save As** function is used on an editable item, the item is saved as a new file and the master version is not updated in MYOB Intranet.

Opening a web link

Web Links are links to common web sites used by your business. In your MYOB Intranet, there may be a specific category set up in the left-hand menu for web links. There may also be web links added to another category.

To open a Web Link either:

- Click the title of the item in the view.
- Select the web link and then choose **Open Document** from the right-click menu.
The system launches your browser to access the web address.

Related topics

[Left-hand menu](#)

[Searching](#)

[Advanced search](#)

[Item view](#)

Searching

Search is available from the:

- “Navigation bar” on page 9 at the top of the MYOB Intranet view.
- “MYOB Intranet Outlook toolbar” on page 10 **Intranet Search**.

Using Search

1. Enter the search text in the **Search** field.
Enter a single word or multiple words. The search is not case sensitive, so text can be entered in upper or lower case.
2. Click the magnifying glass icon next to the search box.
This will start the search.

Search results

The Search Results display the items that contain the search criteria. Results are displayed in alphabetic order based on the title. Also displayed are the item’s name and its location. The number of items found by the search is displayed in the top right-hand corner of the view. If there are no items containing the search text, this displays as 0 Documents.

From the search results you can open an item, create a document or add it to your favourites in the same way as from any other view.

How the search works

Search performs a full text search of the information in MYOB Intranet and looks through the content of the items. It also searches the information included by the MYOB Intranet administrator when the item was added to the MYOB Intranet, i.e., the title and description of the item and any keywords that have been added to the item.

The search will automatically look for variants on the entered search text, e.g., plurals and similar words.

It searches through the content of the Microsoft Word, Excel, PowerPoint, text and html files.

Search will find web links where the search text is part of the title, description, keyword or if the text is part of the web address.

Related topics

[Advanced search](#)

Advanced search

Advanced Search allows you to search for text within the content of the MYOB Intranet items in the same way as the “Searching” on page 17. In addition, it allows various filters to be applied, such a specific **Categories** or **Document Types**. For example, this allows you to search for the text only within documents that have been marked as Letters or only within the Checklists category.

Search for more than one word

If you enter more than one word, the search uses all the entered words applying the AND condition. For example, if “year end” is the search text, content is searched that contains both the word “year” AND the word “end”. The search results will contain items that contain “Year End”, “End of Year”, “At the end of every month for the first year only” etc.

You can enter the search text to find either or any of the words you enter by using the OR condition. For example, if you enter “bank OR statement”, this will search for content that contains either the word “bank” OR the word “statement”.

The search will also find variants of words, for example, if you search for “statement” it will also find “statements”.

Clicking **Advanced Search** displays a separate window with the various filters that are available. Select one or more of the options. A number of filters can be selected, as required.

Title, description and keywords search

The Title, Description and Keyword is the text that displays in the Item View. An item will always have a Title.

Description and Keywords are optional when the item is added to MYOB Intranet. See “Item view” on page 7.

Full text search

A Full Text search is the default filter. The Advanced Search will search through the full text content of all the available items.

Categories search

Select **All Categories** or select one or more specific **Categories**. Where there are sub-categories, click the expand button (the + sign) to display these and select any that are required.

Document types search

When an item is added to MYOB Intranet, it can be allocated a specific Document Type. These can be used as filters in the Advanced Search. Select the **All Document Types** option or select one or more specific types.

Starting the search

Click **Search**. The Search Results display the items that have been found. This is the same as the Search feature. An item can be opened in the same way as from any other view.

Resetting the search

If a typing error is made when entering the search criteria in the **Search Text** field or the search criteria has changed:

1. Click the **Reset** button.
This will clear the **Search Text** field.
2. Re-enter the appropriate search criteria.

Related topics

[Searching](#)

Team lists

The Team List is used to:

Display team members

To display a list of all the people that have been configured for MYOB Intranet:

1. Click the **Team** button.
The **Team List** appears.
The names, phone and mobile numbers, email and reporting structure of the team members are displayed.

Find a team member

1. Enter all or part of the person's name in the **Search Word** field.
2. Click **Search**.
The name of the team member is displayed.

Email a team member

1. Double-click the team member's name on the Team List.
This opens your email application with the team member's email address automatically added as the recipient.
The team members' addresses are entered manually by the MYOB Intranet administrator.

Related topics

[Favourites](#)


[Applications section](#)

[User applications](#)

Favourites

Items can be added to your Favourites so that you can easily access them at any time. For example, this can be used for frequently accessed documents.

Adding a favourite

1. Locate and select an item.
See "Locating and selecting an item" on page 14.
2. Place your mouse over the item and click  (the **Add to Favourites** icon) on the right-hand side of the item details.
or
Select **Add to Favourites** from the right-click menu.
A message is displayed informing you that the selected item has been added to your Favourites list.

Displaying your favourites

Favourites can be displayed either by:

- Clicking the **Favourites** button in the "MYOB Intranet buttons" on page 10.
- Clicking the **Favourites** button in the "MYOB Intranet Outlook toolbar" on page 10.

The Favourites view is displayed with the items that have been added by you.

Removing a favourite

An item can be removed from your Favourites list when it is no longer a favourite. This only removes it from your own Favourites view and does not delete / remove the item from MYOB Intranet.

To remove an item from your Favourites:

1. Display the Favourites view.
2. Select the item that is to be removed from your Favourites list.
3. Select **Remove from Favourites** from the right-click menu.
The selected item is no longer displayed in your Favourites list.

Related topics

[Team lists](#)

[Applications section](#)

[User applications](#)

Applications section

The **Applications** section is a special category on the left-hand menu that contains links to applications used by your business. This offers quick access to applications that are used. Depending on how this has been configured by your MYOB Intranet administrator, the Applications may be grouped into categories. Also, you may only see the Applications you have been given access to use.

Launching an application

1. Navigate to Applications > **Admin Applications**.
2. Click an application to launch it.
The application launches in a separate window in the same way as when it is launched from the Window's Start menu.

Related topics

[Team lists](#)

[Favourites](#)

[User applications](#)

User applications

The **Applications** section in the left-hand menu contains applications that have been added by your MYOB Intranet administrator. The **My Applications** link allows you add applications for your own use and these will display in a separate **User Applications** sub-section within the **Applications** section.

Adding your application

1. Click the **My Applications** link.
The **User Applications** window opens.
2. Right-click the Applications folder or the required category and select **New Application**.
or
Click the **New Application** button on the **User Applications** window toolbar.
The **User Applications** window opens with the **Applications** option selected.
3. Enter the **Title**.
The Title displays when making your selection from the **Applications** section.
4. Enter a **Description**.
5. Enter the full folder and file name for the **Location**.
or
Click the **Browse** button and select the **Location** of the program from the **Open** dialog. Click **Open**.
6. Click **OK** on the **User Applications** window.
7. Select File > **Exit** to close the **User Applications** window.

Note: When you close the **User Applications** window, you may need to refresh MYOB Intranet to see the results of any applications that have been added. Click the **MYOB Intranet** button on the MYOB Intranet Outlook toolbar (or press the **[F5]** on the keyboard).

Launching your application

The applications that you have included for your own use are included in Applications > **User Applications**.

To launch one of these applications:

1. Navigate to the Applications > **User Applications** section.
2. Click an application to launch it.
The application launches in a separate window in the same way as when launched from the Window's Start menu.

To edit or delete a user application by displaying its properties

1. Click the **My Applications** link.
The **User Applications** window opens.

2. Right-click the relevant application.
3. To edit:
 - a. Select **Properties**.
The **Edit Application** dialog appears.
 - b. Edit the Title, Description or Location and file name of the application.
4. To delete:
 - a. Select **Delete Category** from the right-click menu.

Related topics

[User applications](#)

[Adding a category for user applications](#)

Adding a category for user applications

You can create additional categories to group your applications.

To add a category

1. Click the **My Applications** link.
The **User Applications** window opens.
2. Right-click the Applications folder or an existing Category and select **New Category**.
or
Click the **New Category** button on the **User Applications** window toolbar.
The **User Applications** window opens with the **Category** option selected.
3. Enter the **Title**.
The Title displays when making a selection from the **Applications** section.
4. Enter a **Description**.
The Description only displays when editing a Category.

Note: A Category will only display in the **User Applications** section if at least one application has been added to it.

Editing and deleting a user application category

You can edit or delete a User Application Category by displaying its properties:

1. Click the **My Applications** link.
The **User Applications** window opens.
2. Right-click the relevant Category.
3. To edit a User Application Category:
 - a. Select **Properties** from the right-click menu.
The **Edit Application** dialog appears.
 - b. Make any changes as required to the Title or Description of the Category in the same way as when it was added.
4. To delete a User Application category:
 - a. Select **Delete Category** from the right-click menu.

Note: A category can only be deleted if it is empty. First delete any applications or sub-categories that the category contains. Then delete the category.

Related topics

[To edit or delete a user application by displaying its properties](#)
[User applications](#)

Administration and maintenance

The MYOB Intranet Administration can only be accessed by staff members with the appropriate security privileges (e.g., a MYOB Intranet administrator). The MYOB Intranet administrator will have been nominated as administrator by management and will have certain privileges to maintain the contents of MYOB Intranet.

The MYOB Intranet Administration functions are used to add, maintain and delete the categories and standard/stationery item information in MYOB Intranet. They are also used to configure and manage the team members (i.e., those that use MYOB Intranet), any Roles that can be assigned to the team members and certain configuration settings.

Accessing MYOB Intranet Administration

Note: The Administration functions can only be accessed if your MYOB Intranet login has been configured as an MYOB Intranet administrator.

1. Click the **Administration** link.
This is located at the top of the MYOB Intranet window on the navigation bar.
The login dialog appears.
2. Select a login name.
This must be a team member with administrator access.
3. Enter the **Password**.
4. Click **Login**.
The **MYOB Intranet Administration** window opens.

Administering MYOB Intranet videos

Part 1

```
<ac:structured-macro ac:macro-id="90530fcb-0955-4304-924d-6380def01d7f"
ac:name="html" ac:schema-version="1"><ac:plain-text-
body><![CDATA[<p>&nbsp;</p><iframe width="560" height="315" src="https://
www.youtube.com/embed/gghMoKDekd4?feature=player_detailpage"
frameborder="0" allowfullscreen></iframe>]]></ac:plain-text-body></
ac:structured-macro>
```

Part 2

```
<ac:structured-macro ac:macro-id="90530fcb-0955-4304-924d-6380def01d7f"
ac:name="html" ac:schema-version="1"><ac:plain-text-
body><![CDATA[<p>&nbsp;</p><iframe width="560" height="315" src="https://
www.youtube.com/embed/CenOtCxHuyM?feature=player_detailpage"
frameborder="0" allowfullscreen></iframe>]]></ac:plain-text-body></
ac:structured-macro>
```

```
frameborder="0" allowfullscreen></iframe>]]></ac:plain-text-body></ac:structured-macro>
```

Part 3

```
<ac:structured-macro ac:macro-id="90530fcb-0955-4304-924d-6380def01d7f" ac:name="html" ac:schema-version="1"><ac:plain-text-body><![CDATA[<p>&nbsp;</p><iframe width="560" height="315" src="https://www.youtube.com/embed/E3VaaswsGsY?feature=player_detailpage" frameborder="0" allowfullscreen></iframe>]]></ac:plain-text-body></ac:structured-macro>
```

Related topics

[MYOB Intranet Administration window](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)







MYOB Intranet Administration window

The MYOB Intranet Administration window contains the following components:

- Menu and toolbar which contain the menu commands and buttons used to access the functions.
- The left-hand panel which contains the Categories that group and categorise the MYOB Intranet items. It also has a view which lists the items grouped by Document Type and one by Status. It has a view of the Stationery documents that contain layout and formatting that can be applied to Microsoft Word documents. It also gives you access to configure the Applications section. See “Administration left-hand panel” on page 28.
- The Administration Item View displays a list of the items from the currently selected Category in the left-hand panel. See “Administration item view” on page 30.

MYOB Intranet Administration buttons

The following buttons are available in the **MYOB Intranet Administration** window:

	New Item
	New Stationery
	New Category
	Team Members
	Move Category Left
	Move Category Right
	Move Category Up
	Move Category Down
	Delete
	New Application

Related topics

[Overview of using MYOB Intranet Administration](#)

[Administration left-hand panel](#)

[Administration item view](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

Overview of using MYOB Intranet Administration

As well as general administration and configuration of the system users, the Administration function is used to configure the content management of MYOB Intranet.

A MYOB Intranet administrator can:

- Add, change and delete the “Categories” on page 31 in MYOB Intranet and change the sequence in which they are displayed.
- Create standard and stationery “New items” on page 39, “Moving or adding an item to a different category” on page 57 or “Deleting documents and items” on page 58 the items which are the contained in MYOB Intranet.
- Maintain the MYOB Intranet users, the “Roles” on page 74 and the “Document types” on page 77 used in the system.
- In the “Administration left-hand panel” on page 28, display items according to the Document Types that the items have been allocated and by their Status.

- Maintain the “Applications” on page 65 that users can access from the Applications section.
- Maintain the “Stationery documents” on page 47 used with the merge feature.
- Configure “Merge settings” on page 79 when integrating with your practice management system.

The way in which the MYOB Intranet content is configured will depend on the requirements of your own business. For example, a News Category could contain documents or it could contain a Microsoft PowerPoint presentation with photographs from a company event or it could contain a list of web links. When creating the categories and configuring how the content is grouped, it is important that you consider the way in which this will be used in your own business.

Refreshing MYOB Intranet to reflect administration changes

If any changes are made to the content management of the **Administration** window, restart or refresh MYOB Intranet to check how users will view the changes.

When using Microsoft Outlook, refresh the MYOB Intranet Microsoft Outlook window by clicking the **MYOB Intranet** button located on the “MYOB Intranet Outlook toolbar” on page 10.

When using Microsoft Internet Explorer, refresh the page or press **[F5]**.

Related topics

[Administration left-hand panel](#)

[Administration item view](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

[New items](#)

[Deleting documents and items](#)

[Document types](#)

[Roles](#)

[Applications](#)

[Stationery documents](#)

[Merge settings](#)

[MYOB Intranet Outlook toolbar](#)

Administration left-hand panel

The left-hand panel of the MYOB Intranet Administration window contains the categories and any other views that display the content.

Categories

The Categories are the groupings that staff members see in their “Left-hand menu” on page 6 in MYOB Intranet. In the MYOB Intranet Administration window, each category is displayed as a yellow folder icon. Where a category has sub-categories, click the expand button (the + sign) to display the sub-categories.

Clicking a category selects it and displays its content items in the “Administration item view” on page 30 on the right-hand side.

Additional views

At the bottom of the MYOB Intranet Administration window left-hand panel, there are options for some additional views.

View	Description
Document Types	<p>The Document Types view displays published items grouped by the Document Type that has been selected for the item. A Document Type can be optionally selected for an item in the “Document properties” on page 53 to further categorise items.</p> <p>Document Types can be configured as required for your own business from Maintenance > Maintenance Map (AO) > Document Manager Setup > Document Types tab.</p> <p>Staff members can filter by Document Types in the “Advanced search” on page 18.</p>
Status	<p>An item can be assigned a status of:</p> <ul style="list-style-type: none"> • Published • Draft • Deleted. <p>See “Document properties” on page 53.</p> <p>The Status view lists all the MYOB Intranet content based on its status. For example, from this view you can easily display the Properties for an item that is in ‘Draft’ and change this to ‘Published’ so that it is available to users. When an item has a status of ‘Published’, it also displays under its relevant category (or categories) in the MYOB Intranet Administration left-hand panel.</p>
No Category Assigned	<p>If any items have not been assigned to a category (either when imported or adding as a New Item), they can be listed and accessed from the No Category Assigned view. Items can be moved to the correct category by right-clicking the item and using Copy Document, with the Document Properties check or using drag and drop. See “Moving or adding an item to a different category” on page 57.</p>

View	Description
Stationery	“Stationery documents” on page 47 contain layout and formatting information that can be applied to Microsoft Word documents. When a document is marked as Stationery, staff members will see it in the Stationery drop-down list when creating documents using Document Manager. It can then be used in combination with the merge document to provide layout features such as headers, footers, fonts, etc.

Related topics

[Overview of using MYOB Intranet Administration](#)

[Administration item view](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

[Document properties](#)

[Advanced search](#)

[Stationery documents](#)

Administration item view

The Administration Item View displays the items for the category that has been selected in the “Administration left-hand panel” on page 28.

Field	Description
Name	The name (or title) of the item. This is maintained in “Document properties” on page 53.
Description	The description of the item. This is maintained in “Document properties” on page 53.
Stationery	If the item has been configured as a “Stationery documents” on page 47, this is shown with Yes in the Stationery column of the Administration Item View.
Date	The date the item was added or last updated.
Status	The Status of the item which can be Published, Draft or Deleted. Only published items will be available for use in MYOB Intranet.

Related topics

[Overview of using MYOB Intranet Administration](#)

[Administration left-hand panel](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

[Document properties](#)

[Advanced search](#)

[Stationery documents](#)

Categories

The panel on the left-hand side contains the categories. Categories determine the sections and the structure of the content that displays in the “Administration left-hand panel” on page 28.

As well as the names of the categories, the sequence in which the categories are displayed in the **MYOB Intranet Administration** window determines the sequence in which team members see them. Sub-categories can be added to further group the items and create an information hierarchy.

Each folder icon in the **MYOB Intranet Administration** window left-hand panel is a category in the MYOB Intranet left-hand menu.

Categories can be added, edited (by displaying the properties) and deleted. The sequence and hierarchy in which categories display can also be changed.

When a category is added or edited, the **Edit Category** window opens with the category’s properties:

Title

The Title is the category description that team members see in the MYOB Intranet left-hand menu. The categories Title is limited to a maximum of 30 characters.

Roles tab

Using the **Roles** tab, you can select the team members grouped within a role who will have access to the items and any sub-categories within the category. The roles are configured using the “Roles” on page 74 function. The staff members are set up in the “Team members” on page 70 function.

For a new category, this is initially set with **All** roles selected. To limit access to specific roles, select the relevant role(s) that have access to certain items held in the category.

You can also set which categories are accessible for a role from the role function itself. See “Roles” on page 74.

Related topics

[Adding a new category](#)

[Assigning role\(s\) to a category](#)

[Moving categories in the structure](#)

[Editing a category](#)

[Deleting a category](#)

[No category assigned](#)

[Categories](#)

[Overview of using MYOB Intranet Administration](#)

[Administration left-hand panel](#)

[Maintaining the MYOB Intranet content](#)

[Document properties](#)

[Advanced search](#)

[Stationery documents](#)

Adding a new category

To add a new category

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Highlight the Intranet heading at the top of the left-hand panel to add a new top level category.
or
Select an existing category to create a sub-category.
3. Select File > **New Category**.
or
Right-click the Intranet heading or an existing category and select **New Category**.
The **New Category** window opens.
4. Enter a new category **Title** in the field.
The category **Title** is limited to a maximum of 30 characters.
The Title is the category description that users will see in the MYOB Intranet left-hand menu Categories.
5. Select the **Roles** for the category.
Click the checkboxes of the practice roles that will be able to see and use this category.
6. Click **OK** or press **[Enter]**.

The new category is added to the **MYOB Intranet Administration** window left-hand panel. The **New Category** window closes.

Related topics

[Categories](#)

[Assigning role\(s\) to a category](#)

[Moving categories in the structure](#)

[Editing a category](#)

[Deleting a category](#)

[No category assigned](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

Assigning role(s) to a category

A user can be assigned one or more “Roles” on page 74.

By default, a category is assigned with **All** the roles enabled. This allows all team members access to all items in the category. If relevant, access to a category can be restricted according to the team members' roles. In the **Roles** tab, select one or more roles as relevant. If specific roles have been set in a category, only users that have been assigned that role will be able to view the category in their left-hand menu.

Note: Roles are configured using the Roles function. The categories that are available to certain roles can be selected from the Roles function itself.

Related topics

[Roles](#)

[Categories](#)

[Adding a new category](#)

[Moving categories in the structure](#)

[Editing a category](#)

[Deleting a category](#)

[No category assigned](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

Moving categories in the structure

When a new category is added, it initially displays in the hierarchy directly below the category that was highlighted in the left-hand panel when **New Category** was selected. It can then be moved to a different position in the structure as required.

Tip: A sub-category can only be moved left or right.

To move a category

You can move a category in the **MYOB Intranet Administration** window by either:

- Right-click the category and select **Move Up**, **Move Down**, **Move Left** or **Move Right** as relevant.
- or
- Select the category. Then use the **Move Category Up**, **Move Category Down**, **Move Category Left** or **Move Category Right** buttons on the toolbar as relevant.

Note: Moving a category will also move all the items and any sub-categories that it contains.

Related topics

[Categories](#)

[Adding a new category](#)

[Assigning role\(s\) to a category](#)

[Editing a category](#)

[Deleting a category](#)

[No category assigned](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

Editing a category

To edit a category

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Right-click a category and select **Properties**.
The **Edit Category** window opens.
3. Edit the **Title** of the category, as required.

4. Select different **Roles** associated with the category items, as required.
5. Click **OK** or press **[Enter]**.
The **Edit Category** window closes and the changes to the category are saved.

Related topics

[Categories](#)

[Adding a new category](#)

[Assigning role\(s\) to a category](#)

[Moving categories in the structure](#)

[Deleting a category](#)

[No category assigned](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

Deleting a category

Note: You will not be allowed to delete a category that contains items or sub-categories. The items or sub-categories in a category must be deleted or moved before the category itself can be deleted.

To delete a category

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Right-click the category and select **Delete Category**.
A MYOB Intranet message displays requesting confirmation to delete the selected category.
3. Click **Yes** to delete the category or **No** to cancel the deletion.

Related topics

[Categories](#)

[Adding a new category](#)

[Assigning role\(s\) to a category](#)

[Moving categories in the structure](#)

[Editing a category](#)

[No category assigned](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

No category assigned

If any items have not been assigned to a category, they will not display to team members in MYOB Intranet. The items can be accessed from the **No Category Assigned** view at the bottom of the panel on the left-hand side of the **MYOB Intranet Administration** window.

To assign an item to a category

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Right-click the item and select **Properties**.
The **Document Properties** window opens.
3. Click the **Categories** tab.
4. Click the checkboxes of one or more categories.
These are the categories under which the item will be displayed.
5. Click **OK**.
The **Document Properties** window closes and the item is assigned to the selected categories.

Related topics

[Categories](#)

[Adding a new category](#)

[Assigning role\(s\) to a category](#)

[Moving categories in the structure](#)

[Editing a category](#)

[Deleting a category](#)

[Categories](#)

[Maintaining the MYOB Intranet content](#)

[Overview of using MYOB Intranet Administration](#)

[Document properties](#)

Maintaining the MYOB Intranet content

There are two types of items and documents in MYOB Intranet:

- Standard items

Standard items are the documents and other items that make up the content of MYOB Intranet. These can be, e.g., documents, spreadsheets, presentations or a file from any other type of application. These can also be links to web sites.

Microsoft Word documents can contain text. They can also include merge fields. These can be configured to access information from your practice management system and/or to prompt staff members to enter information directly.

- Stationery documents.

“Stationery documents” on page 47 contain layout and formatting that can be applied to Microsoft Word documents. Staff members can select a stationery document when using **Create Document** in MYOB Document Manager to provide layout features such as headers, footers, fonts, etc.

When using merge, there are specific bookmarks that must be included in the Standard documents and the Stationery documents. See “Bookmarks” on page 60.

Note: From the **MYOB Intranet Administration** window, you can also configure the links that are available to users in the “Applications section” on page 21.

Related topics

[Opening and editing items](#)

[New items](#)

[Indexing new items](#)

[Stationery documents](#)

[Document properties](#)

[Maintaining multiple versions of items](#)

[Moving or adding an item to a different category](#)

[Deleting documents and items](#)

[Bookmarks](#)

[Importing items](#)

[Exporting items](#)

[Applications](#)

[Application categories](#)

[Team members](#)

[Roles](#)

[Document types](#)

[Configuration](#)

[Merge settings](#)

[Reindex all documents](#)

Opening and editing items

An existing item can be opened from MYOB Intranet Administration in a number of ways:

- Double-click the item in the Administration Item View.

- Right-click the item and select **Open Document**.
- Select the item and then Edit > **Open Document**.

This opens the item in the application in which it was originally created (e.g., Microsoft Word, Microsoft Excel).

Editing an opened item

If an item has been added to MYOB Intranet as read only (see “Document properties” on page 53) changes cannot be made or saved to the item. The application's **Save As** function must be used to save the item to a new location and with a new file name. The item is then added to MYOB Intranet as a new item (see “New items” on page 39). However, to make changes to a standard or stationery document, a new version of the document must be created.

Adding a new version of an item

To change a document or other items already held in MYOB Intranet, use the **Version** function of Document Properties. See **New Version** under “Maintaining multiple versions of items” on page 56.

Related topics

[New items](#)

[Indexing new items](#)

[Stationery documents](#)

[Document properties](#)

[Maintaining multiple versions of items](#)

[Moving or adding an item to a different category](#)

[Deleting documents and items](#)

[Bookmarks](#)

[Importing items](#)

[Exporting items](#)

[Applications](#)

[Application categories](#)

[Team members](#)

[Roles](#)

[Document types](#)

[Configuration](#)

[Merge settings](#)

[Reindex all documents](#)

New items

Documents and other items are the content of MYOB Intranet. Any type of file can be included in MYOB Intranet, e.g., word processing documents, spreadsheets, presentations, images, etc. and web links.

A new item can be added to MYOB Intranet in one of three ways:

- Creating it from an existing item - this option enables you to add an item to MYOB Intranet that has been created in a different application. This in effect allows you to import a single file.
- Creating a new document - enables you to create a Microsoft Word document directly from MYOB Intranet. The file name and location are automatically assigned.
- Creating a web link - enables you to configure items as web links. These can be used to link to common web sites used by your business. You may decide to configure a specific category for web links or they can be included in categories with other items.

Assigning an item to a category

When you add an item to MYOB Intranet you assign it to one or more categories. The categories are the sections from which users access the items in the MYOB Intranet left-hand menu. Before adding a new item, decide where it will be held in the category hierarchy.

If you have not assigned a category to an item, it will not be available to users and it displays in **MYOB Intranet Administration** window, **No Category Assigned** view in the panel on the left-hand side.

Status of new items

New items are automatically assigned a status of **Published**.

Making changes

Items can be added, edited and deleted. You edit items or set the status to **Draft** with “Document properties” on page 53. You can also use Document Properties to change the category in which an item displays.

Including bookmarks in merge and stationery documents

If you are using **Create from Existing** or **Create New Document** to add a new item that will be used to merge information you will need to ensure the specific bookmarks used by MYOB Intranet are included. See “Bookmarks” on page 60.

Related topics

[Opening and editing items](#)

[Indexing new items](#)

[Adding a new item](#)

[Adding a stationery document](#)

[Stationery documents](#)

[Document properties](#)

[Maintaining multiple versions of items](#)

[Moving or adding an item to a different category](#)

[Deleting documents and items](#)

[Bookmarks](#)

[Importing items](#)

[Exporting items](#)

[Applications](#)

[Application categories](#)

[Team members](#)

[Roles](#)

[Document types](#)

[Configuration](#)

[Merge settings](#)

[Reindex all documents](#)

Adding a new item

There are 3 different ways to add a new item:

To create a new item from an existing item

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. In the left-hand panel, select the Category to which a new item is to be added.
One or more Categories can be selected later in the **Type** tab on the **New Item** window.
3. Select **File > New Item**.
or
Right-click the Category and select **New Item**.
The **New Item** window opens on the **File name** tab by default.
4. Select the **Create from Existing** option.
5. Enter a **File** name or click the ellipsis to browse and select the file within your system.
6. Select the **Move Document** or **Copy Document** option.

7. Click **Next**.

The **Type** tab is displayed. The **Type** tab is used to optionally select a Document Type and one or more Categories.

8. Select the **Type** from the drop-down list.

The entries for Type are set up in Maintenance > Maintenance Map (AO) > Document Manager Setup > **Document Types** tab.

You can display items by the type they have been assigned in the **Document Types** view, in the left-hand panel. Staff members can select Document Types as part of the search criteria in the “Advanced search” on page 18.

9. Select the **Categories** that the new item will be available in.

Click the required checkboxes to select the Category. The categories are the sections used to group the content. Where a category has sub-categories, click the expand button (the + sign) to display these and select any required sub-categories.

10. Click **Next**.

The **Details** tab is displayed. The **Details** tab is used to enter general details about the item. Title, Description and Keywords are used in “Searching” on page 17 and “Advanced search” on page 18.

11. Enter a **Title** for the item.

The Title displays in the “Item view” on page 7.

12. Enter a **Description** for the item.

The Description is optional and displays below the Title in the MYOB Intranet Item View.

13. Enter **Keywords** for the item.

Keywords are optional. Enter any keywords that further identify the item. These are also displayed in the MYOB Intranet Item View.

Keywords are limited to a maximum of 500 characters.

14. Select the **Publisher** from the drop-down list.

or

Click the **Publisher** icon.

The Publisher is the name of the person or organisation from where the item originated. As well as MYOB Intranet staff members, this can also be organisations such as the Tax Office, MYOB or Bentleys. This displays on the MYOB Intranet Item View.

15. Select whether the item will **Expire** and the expiry date.

By default, an item will not expire. You can set a date that an item expires by clicking the **Expire** checkbox and entering the date or selecting a date from the

drop-down calendar. Once the specified date is passed, the item will no longer be displayed in MYOB Intranet. It will still display in the MYOB Intranet Administration window and, if required, the date can be reset to re-display it in MYOB Intranet.

16. Select whether the item will be **Read Only**.
The default is Read Only. Items are normally held as Read Only so that staff members or administrators cannot make any changes to the original file.
If you want the original of the item to be editable, remove the Read Only selection. An editable item displays in the Item View with an **Editable** icon. See “Item view” on page 7 for an example.
17. In the **Document Manager Only** section, select whether **Approval Required** and/or **Send via Post** is required for the new item.
18. Click **Finish**.
The new item is added directly to the relevant category(ies).

To create a new item

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. In the left-hand panel, select the Category to which a new item is to be added.
One or more Categories can be selected later in the **Type** tab on the **New Item** window.
3. Select File > **New Item**.
or
Right-click the Category and select **New Item**.
The **New Item** window opens on the **File name** tab by default.
4. Select the **Create New Document** option.
5. Click **Next**.
The **Type** tab is displayed. The **Type** tab is used to optionally select a Document Type and one or more Categories.
6. Select the **Type** from the drop-down list.
The entries for Type are set up in Maintenance > Maintenance Map (AO) > Document Manager Setup > **Document Types** tab.
You can display items by the type they have been assigned in the **Document Types** view, in the left-hand panel. Staff members can select Document Types as part of the search criteria in the “Advanced search” on page 18.
7. Select the **Categories** that the new item will be available in.

Click the required checkboxes to select the Category. The categories are the sections used to group the content. Where a category has sub-categories, click the expand button (the + sign) to display these and select any required sub-categories.

8. Click **Next**.

The **Details** tab is displayed. The **Details** tab is used to enter general details about the item. Title, Description and Keywords are used in “Searching” on page 17 and “Advanced search” on page 18.

9. Enter a **Title** for the item.

The Title displays in the “Item view” on page 7.

10. Enter a **Description** for the item.

The Description is optional and displays below the Title in the MYOB Intranet Item View.

11. Enter **Keywords** for the item.

Keywords are optional. Enter any keywords that further identify the item. These are also displayed in the MYOB Intranet Item View.

Keywords are limited to a maximum of 500 characters.

12. Select the **Publisher** from the drop-down list.

or

Click the **Publisher** icon to open the **Select Publisher** window to select the appropriate publisher. Click **OK**.

The Publisher is the name of the person or organisation from where the item originated. As well as MYOB Intranet staff members, this can also be organisations such as the Tax Office, MYOB or Bentleys. This displays on the MYOB Intranet Item View.

13. Select whether the item will **Expire** and the expiry date.

By default, an item will not expire. You can set a date that an item expires by clicking the **Expire** checkbox and entering the date or selecting a date from the drop-down calendar. Once the specified date is passed, the item will no longer be displayed in MYOB Intranet. It will still display in the **MYOB Intranet Administration** window and, if required, the date can be reset to re-display it in MYOB Intranet.

14. Select whether the item will be **Read Only**.

The default is Read Only. Items are normally held as Read Only so that staff members or administrators cannot make any changes to the original file.

If you want the original of the item to be editable, deselect the Read Only checkbox. An editable item displays in the Item View with an **Editable** icon. See “Item view” on page 7 for an example.

15. In the **Document Manager Only** section, select whether **Approval Required** and/or **Send via Post** is required for the new item.
16. Click **Finish**.

The new item is added directly to the relevant category(ies).
Microsoft Word is launched. You can then type or paste the contents of the new document. When you save the new document, it is automatically given an internal file name. If required, a copy of the document can be saved elsewhere. When you exit Microsoft Word, you will be prompted to **Save** or **Discard** the document. Click **Save** to add the new item to the selected category(ies). Selecting **Discard** will not add the item to MYOB Intranet.

To create a new web link

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. In the left-hand panel, select the Category to which a new item is to be added.
One or more Categories can be selected later in the **Type** tab on the **New Item** window.
3. Select **File > New Item**.
or
Right-click the Category and select **New Item**.
The **New Item** window opens on the **File name** tab by default.
4. Select the **Create web link** option.
5. Enter the URL of the new web link.
The full web address including the **http://** or **https://** must be entered.
6. Click **Next**.
The **Type** tab is displayed. The **Type** tab is used to optionally select a Document Type and one or more Categories.
7. Select the **Type** from the drop-down list.
The entries for Type are set up in **Maintenance > Maintenance Map (AO) > Document Manager Setup > Document Types** tab.
You can display items by the type they have been assigned in the **Document Types** view, in the left-hand panel. Staff members can select Document Types as part of the search criteria in the “Advanced search” on page 18.
8. Select the **Categories** that the new item will be available in.
Click the required checkboxes to select the Category. The categories are the sections used to group the content. Where a category has sub-categories, click

the expand button (the + sign) to display these and select any required sub-categories.

9. Click **Next**.

The **Details** tab is displayed. The **Details** tab is used to enter general details about the item. Title, Description and Keywords are used in “Searching” on page 17 and “Advanced search” on page 18.

10. Enter a **Title** for the item.

The Title displays in the “Item view” on page 7.

11. Enter a **Description** for the item.

The Description is optional and displays below the Title in the MYOB Intranet Item View.

12. Enter **Keywords** for the item.

Keywords are optional. Enter any keywords that further identify the item. These are also displayed in the MYOB Intranet Item View.

Keywords are limited to a maximum of 500 characters.

13. Select the **Publisher** from the drop-down list.

or

Click the **Publisher** icon to open the **Select Publisher** window to select the appropriate publisher. Click **OK**.

The Publisher is the name of the person or organisation from where the item originated. As well as MYOB Intranet staff members, this can also be organisations such as the Tax Office, MYOB or Bentleys. This displays on the MYOB Intranet Item View.

14. Select whether the item will **Expire** and the expiry date.

By default, an item will not expire. You can set a date that an item expires by clicking the **Expire** checkbox and entering the date or selecting a date from the drop-down calendar. Once the specified date is passed, the item will no longer be displayed in MYOB Intranet. It will still display in the **MYOB Intranet Administration** window and, if required, the date can be reset to re-display it in MYOB Intranet.

15. Select whether the item will be **Read Only**.

The default is Read Only. Items are normally held as Read Only so that staff members or administrators cannot make any changes to the original file.

If you want the original of the item to be editable, deselect the Read Only checkbox. An editable item displays in the Item View with an **Editable** icon. See “Item view” on page 7 for an example.

16. In the **Document Manager Only** section, select whether **Approval Required** and/or **Send via Post** is required for the new web link.
17. Click **Finish**.

The new web link is added directly to the relevant category(ies).

Related topics

[Opening and editing items](#)

[Indexing new items](#)

[Stationery documents](#)

[Document properties](#)

[Maintaining multiple versions of items](#)

[Moving or adding an item to a different category](#)

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Indexing new items

If documents are imported without **Indexing** selected, these new items will have to be indexed for the full text search to include the contents of the documents. This is performed with the “Reindex all documents” on page 80 function.

Note: Reindexing operates over the entire database. Depending on the amount of content you have in MYOB Intranet, you may find that the **Reindex All Documents** takes a long time to run. You may therefore decide to leave the indexing until a convenient time or leave it to run overnight.

Related topics

[Opening and editing items](#)

[New items](#)

[Stationery documents](#)

[Document properties](#)

[Maintaining multiple versions of items](#)

[Moving or adding an item to a different category](#)

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Stationery documents

Stationery documents contain layout and formatting that can be applied to Microsoft Word documents. When a document is marked as Stationery, staff members will see it in the **Stationery** drop-down list when creating documents in MYOB Document Manager. It can then be used in combination with the merge document to provide layout features such as headers, footers, fonts, etc.

You would generally only have a few stationery documents configured for use in MYOB Intranet.

All stationery documents display automatically under the Stationery view in the left-hand panel. You can open, copy, delete and display properties in the same way as all other items.

A new stationery item will display a **Yes** in the Stationery column in the MYOB Intranet Administration Item View.

A new stationery document can be added to MYOB Intranet in one of two ways:

- Creating it from an existing document.

This option enables you to add a stationery document to MYOB Intranet that has been created in a different application. This in effect allows you to import a single file.

- Creating a new document.

This option enables you to create a Microsoft Word document directly from MYOB Intranet. The file name and location are automatically assigned.

Including a stationery document in a category

As well as configuring stationery documents that will be used in the merge process (when using **Create Document**), you can also include stationery documents in any of the standard categories in the same way as any other item. They can then be used in the same way as any other item.

Marking an existing item as a stationery document

A new item can be added and then marked as a stationery document in the “Document properties” on page 53 on the **Details** tab.

Importing stationery

Stationery documents can be imported in the same way as other items. Display the “Document properties” on page 53, and, from the **Details** tab, select **Stationery**.

Including bookmarks in merge and stationery documents

If you are using **Create from Existing** or **Create New Document** to add a new item that will be used to merge information ensure that the specific bookmarks used by MYOB Intranet are included. See “Bookmarks” on page 60.

Related topics

[Opening and editing items](#)

[New items](#)

[Adding a new item](#)

[Adding a stationery document](#)

[Indexing new items](#)

[Document properties](#)

[Maintaining multiple versions of items](#)

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Adding a stationery document

When adding a new stationery document from the Stationery view, it is not added to any other categories. It will display only under the Stationery view.

When adding a new stationery document from a category, it displays both in that category and under the Stationery view.

To add a new stationery document

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select the **Stationery** category in the left-hand panel.
3. Select **File > New Stationery**.
or
Right-click **Stationery** and select **New Stationery**.
or
Select the **New Stationery** icon on the toolbar.
The **New Stationery** window opens on the **File name** tab by default.
4. Select the **Create New Document** option.
5. Click **Next**.
The **Type** tab is displayed. The **Type** tab is used to optionally select a Document Type and one or more Categories.
6. Select the **Type** from the drop-down list.
As you are creating a new stationery document, select **Stationery** as the type.
The entries for Type are set up in **Maintenance > Maintenance Map (AO) > Document Manager Setup > Document Types** tab.
You can display items by the type they have been assigned in the **Document Types** view, in the left-hand panel. Staff members can select Document Types as part of the search criteria in the “Advanced search” on page 18.
7. Select the **Categories** that the new stationery item will be assigned to.
The categories are the sections used to group the content. Where a category has sub-categories, click the expand button (the + sign) to display these and select any required sub-categories.
8. Click **Next**.
The **Details** tab is displayed. The **Details** tab is used to enter general details about the item. Title, Description and Keywords are used in “Searching” on page 17 and “Advanced search” on page 18.

9. Enter a **Title** for the item.
The Title displays in the “Item view” on page 7.
10. Enter a **Description** for the item.
The Description is optional and displays below the Title in the MYOB Intranet Item View.
11. Enter **Keywords** for the item.
Keywords are optional. Enter any keywords that further identify the item. These are also displayed in the MYOB Intranet Item View.
Keywords are limited to a maximum of 500 characters.
12. Select the **Publisher** from the drop-down.
or
Click the **Publisher** icon to open the **Select Publisher** window to select the appropriate publisher. Click **OK**.
The Publisher is the name of the person or organisation from where the item originated. As well as MYOB Intranet team members (staff members), this can also be organisations such as the Tax Office, MYOB or Bentleys. This displays on the MYOB Intranet Item View.
13. Select whether the item will **Expire** and the expiry date.
By default, an item will not expire. You can set a date that an item expires by clicking the **Expire** checkbox and entering the date or selecting the date from the drop-down calendar. Once the specified date is passed, the item will no longer be displayed in MYOB Intranet. It will still display in the **MYOB Intranet Administration** window and, if required, the date can be reset to re-display it in MYOB Intranet.
14. Select whether the item will be **Read Only**.
The default is Read Only. Items are normally held as Read Only so that staff members or administrators cannot make any changes to the original file.
If you want the original of the item to be editable, remove the Read Only selection. An editable item displays in the Item View with an **Editable** icon. See “Item view” on page 7.
15. Click **Finish**.
The new stationery item is added directly to the stationery view or to the relevant category(ies).
Microsoft Word will be launched. You can then type or paste the contents of the new stationery document. When you save the new stationery document it is automatically given an internal file name. If required, a copy of the stationery document can be saved elsewhere. When you exit Microsoft Word, you will be prompted to **Save** or **Discard** the document. Click **Save** to add the new item to

the selected category(ies). Selecting **Discard** will not add the item to MYOB Intranet.

To create a new stationery document from an existing document

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select the **Stationery** category in the left-hand panel.
3. Select **File > New Stationery**.
or
Right-click **Stationery** and select **New Stationery**.
or
Select the **New Stationery** icon on the toolbar.
The **New Stationery** window opens on the **File name** tab by default.
4. Select the **Create from Existing** option.
5. Enter a **File** name or click the ellipsis button to find and select the file within your system. Click **Open**.
6. Select the **Move Document** or **Copy Document** option.
7. Click **Next**.
The **Type** tab is displayed. The **Type** tab is used to optionally select a Document Type and one or more Categories.
8. Select the **Type** from the drop-down list.
As you are creating a new stationery document, select **Stationery** as the type.
The entries for Type are set up in Maintenance > Maintenance Map (AO) > Document Manager Setup > **Document Types** tab.
You can display items by the type they have been assigned in the **Document Types** view, in the left-hand panel. Staff members can select Document Types as part of the search criteria in the “Advanced search” on page 18.
9. Select the **Categories** that the new item will be available in.
The categories are the sections used to group the content. Where a category has sub-categories, click the expand button (the + sign) to display these and select any required sub-categories.
10. Click **Next**.
The **Details** tab is displayed. The **Details** tab is used to enter general details about the item. Title, Description and Keywords are used in “Searching” on page 17 and “Advanced search” on page 18.

11. Enter a **Title** for the item.
The Title displays in the “Item view” on page 7.
12. Enter a **Description** for the item.
The Description is optional and displays below the Title in the MYOB Intranet Item View.
13. Enter **Keywords** for the item.
Keywords are optional. Enter any keywords that further identify the item. These are also displayed in the MYOB Intranet Item View.
Keywords are limited to a maximum of 500 characters.
14. Select the **Publisher** from the drop-down.
or
Click the **Publisher** icon to open the **Select Publisher** window to select the appropriate publisher. Click **OK**.
The Publisher is the name of the person or organisation from where the item originated. As well as MYOB Intranet staff members, this can also be organisations such as the Tax Office, MYOB or Bentleys. This displays on the MYOB Intranet Item View.
15. Select whether the item will **Expire** and the expiry date.
By default, an item will not expire. You can set a date that an item expires by clicking the **Expire** checkbox and entering the date or selecting the date from the drop-down calendar. Once the specified date is passed, the item will no longer be displayed in MYOB Intranet. It will still display in the **MYOB Intranet Administration** window and, if required, the date can be reset to re-display it in MYOB Intranet.
16. Select whether the item will be **Read Only**.
The default is Read Only. Items are normally held as Read Only so that staff members or administrators cannot make any changes to the original file.
If you want the original of the item to be editable, remove the Read Only selection. An editable item displays in the Item View with an **Editable** icon. See “Item view” on page 7.
17. Click **Finish**.
The new stationery item is added directly to the stationery view or to the relevant category/categories.

Related topics

[Opening and editing items](#)

[New items](#)

[Indexing new items](#)

[Document properties](#)

[Maintaining multiple versions of items](#)

[Moving or adding an item to a different category](#)

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Document properties

When an item or document has been added to the MYOB Intranet Administration, you can use its Document Properties to make changes.

To change a document's properties

1. Access the **MYOB Intranet Administration** window.
See "Administration and maintenance" on page 25.
2. Locate the item.
The item will be located in the left-hand panel of the **MYOB Intranet Administration** window. If relevant, expand the category the item belongs to.
3. Right-click an item in the Administration Item View and select **Properties**.
or
Select the item and then select Edit > **Properties** on the main menu.
The **Document Properties** window opens.
The name of the item is displayed in the **Name** field. This is the Title which displays in the "Item view" on page 7.
4. Enter or edit the **Description** of the item.
The Description is optional and displays below the Title in the MYOB Intranet Item View. It is also used in "Searching" on page 17 and "Advanced search" on page 18.
5. Confirm the **File Name**.

This displays the name of the original file or the URL of a web link. This would not normally be changed, unless the item is a web link and you need to change it to a different URL.

6. Enter or edit any **Keywords** that further identify the item.

These display in the MYOB Intranet Item View and are used in “Searching” on page 17 and “Advanced search” on page 18.

7. Select the **Status** of the item from the drop-down.

You can set the status as one of the following:

- **Published** — an item will only appear in MYOB Intranet if it has a Published status.
- **Draft** — only administrators will see an item with the Draft status. Draft items display in the **Status - Draft** view in the “Administration left-hand panel” on page 28.
- **Deleted** — an item with the status Deleted will not display in the MYOB Intranet categories. This status is set if you do not want to permanently delete an item and you do not want it to display to any users. When you delete a Published item, it is initially set with the status Deleted. It then displays in the Status view in the “Administration left-hand panel” on page 28 under Deleted from where it can be permanently removed. Refer also to “Deleting documents and items” on page 58.

8. Select the **Publisher** from the drop-down.

or

Click the **Publisher** icon to open the **Select Publisher** window to select the appropriate publisher. Click **OK**.

The Publisher is the name of the person or organisation from where the item originated. As well as MYOB Intranet staff members, this can also be organisations such as the Tax Office, MYOB or Bentleys. This displays on the MYOB Intranet Item View.

9. Select whether the item will be **Read Only**.

The default is Read Only. Items are normally held as Read Only so that team members or administrators cannot make any changes to the original file. When a team member or administrator opens a Read Only file, they can read the contents, make any changes as required, print it and save it to any folder with a new file name. If you want the original of the item to be editable, remove the Read Only selection.

10. Select whether the item is a **Stationery** document.

Select this checkbox to change an existing document to a stationery document or to remove the stationery setting. See “Stationery documents” on page 47 for details.

11. Select the document **Type** from the drop-down.
The entries for Type are set up in Maintenance > Maintenance Map (AO) > Document Manager Setup > **Document Types** tab.
You can display items by the type they have been assigned in the **Document Types** view, in the left-hand panel. Staff members can select Document Types as part of the search criteria in the “Advanced search” on page 18.
12. Confirm the current, active **Version** of the item.
Versions of items can be created using the **Version** tab (see “Maintaining multiple versions of items” on page 56).
13. Select whether the item will **Expire** and its expiry date.
By default, an item will not expire. You can set a date that an item expires by selecting **Expires** and entering the date or selecting the date from the drop-down calendar. Once the specified date is passed, the item will no longer display in MYOB Intranet. It will still display in the **MYOB Intranet Administration** window and, if required, the date can be reset to re-display it in MYOB Intranet.
14. Click the **Categories** tab.
The categories are used to group the MYOB Intranet content.
The **Current** section displays the categories that the item is currently assigned to.
15. Select one or more Categories in which the new item will display from the **Section(s)** section.
Where a category has sub-categories, click the expand button (the + sign) to display these and select any required sub-categories.
16. Click the **Version** tab.
The **Version** tab lists the local and published versions of the item and when they have been modified. The active version is displayed in bold. See “Maintaining multiple versions of items” on page 56.
17. Click **OK**.
The properties of the item have been changed.

Related topics

[Opening and editing items](#)

[New items](#)

[Indexing new items](#)

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Maintaining multiple versions of items

You can maintain multiple versions of items. The **Version** tab in the “Document properties” on page 53 window displays a list of all the versions for the currently highlighted item. The active version displays in bold.

Version numbers are allocated automatically, starting from zero (0) and incrementing by 1 (1, 2, 3, etc.).

Version functions

Right-click an entry to display the functions available with versioning.

Set version active

When there is more than one version, **Set Version Active** will set the currently highlighted version as the active one. This makes it the version that users access from MYOB Intranet. The active version displays in bold.

New version

New Version will open the currently highlighted version so that changes can be made. It is opened in the application in which it was originally created (e.g., Microsoft Word, Microsoft Excel). When you save the edited version (using the application's standard save functions), you are prompted to select one of the following:

- **Publish** — save the edited file as a new version and automatically make it the current version with a status of Published.
- **Save** — save the edited file as a new version, with a new version number, but do not make it the current version.
- **Discard** — do not save any changes.

Import document version

Selecting **Import Document Version** displays the **Open** dialog from which you can select one file. When you click **Open**, you are prompted with the same options as for a New Version.

View version

View Version will open the currently highlighted version. It is opened in the application in which it was originally created (e.g., Microsoft Word, Microsoft Excel). You can read the opened item. If you need to make any changes, you will only be allowed to save the changes to a new file name which will not be included as a new version. If you want the file to be included as a new version, use the **New Version** function.

Related topics

[Opening and editing items](#)

[New items](#)

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Moving or adding an item to a different category

The categories that an item is displayed under can be changed or added using one of the following methods:

- Display the “Document properties” on page 53 and, on the **Categories** tab, select or deselect different or additional categories. If relevant, expand the categories to display any sub-categories.

- Right-click the item and select **Copy Document**. Select the destination category, right-click and select **Paste Document**.
- Select the item and then select Edit > **Copy Document**. Select the destination category and Edit > **Paste Document**.
- To move an item, select the item then drag it and drop it into the destination category.
- To copy an item to include it in an additional category, select the item. Then press **[Ctrl]** and drag and drop the item in a category. This will copy the item to the other category.

Related topics

[Opening and editing items](#)

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Deleting documents and items

An item can be marked as deleted. This sets its status to Deleted so that it no longer displays in the categories. It does not physically delete the document.

To delete documents and items

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Right-click the item in the MYOB Intranet Administration Item View and select **Delete Document**.

or

Select the item and then select Edit > **Delete Document**.

The MYOB Intranet confirmation message appears requesting confirmation to delete the selected document.

You can delete more than one item at a time.

3. Click **Yes** to delete the item or click **No** to cancel the deletion of the item.

You can also change the status of an item to Deleted in “Document properties” on page 53.

Note: When an item is marked with the status Deleted, all other details in the Properties (such as the original category selections) are retained. This allows you to republish an item without having to reset its details.

To permanently delete an item

An item can only be permanently deleted if it has a status of Deleted. An item that has a status of Deleted displays in the **Status - Deleted** view in the left-hand panel.

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.

2. Display the Status > **Deleted** view.

3. Right-click an item and select **Delete Document**.

A MYOB Intranet confirmation dialog appears requesting confirmation to permanently delete the selected document and its history.

4. Click **Yes**.

The item will be permanently deleted and cannot be restored from within MYOB Intranet.

Related topics

[Opening and editing items](#)

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Bookmarks

If a document is added that will be used to merge information you will need to ensure that it includes the specific Microsoft Word bookmarks that are required by MYOB Intranet. These bookmarks allow you to merge between the standard document and the stationery documents. For information on using Microsoft Word bookmarks, refer to the Microsoft Word help.

Bookmarks in standard documents used for merge

Two bookmarks are required in the standard documents used for merge:

1. At the beginning of the standard text, add a bookmark called "BodyStart".
2. At the end of the standard text, add another bookmark called "BodyEnd".

Bookmarks in stationery documents

If you are creating stationery documents, insert a bookmark called "StandardTextMark" where you want the body of the text from the standard documents to start. For example, this might be two lines below the header.

How the bookmarks are used in the merge

During the merge, the text in the standard document between the 'BodyStart' and 'BodyEnd' will be inserted after the 'StandardTextMark' bookmark in the stationery document. Anything in the stationery document that follows **after** the 'StandardTextMark' bookmark, will appear at the **end** of the text from the standard document.

Related topics

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Importing items

The **Import** function can be used to import items from a selected location. As part of the Import you select various parameters that apply to all the imported items. You can also select a category that they will be assigned to as part of the import.

As well as importing the items, the Import can be set to automatically create the categories in the MYOB Intranet using the folder names from where the items are located.

To import an item

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select File > **Import Documents** from the main menu.
The **Document Import** window opens on the **File Name** tab by default.
3. Browse to folder that contains the documents to import.
This is the location of the files to be imported.
4. Select whether to **Include all subfolders**.
When this option is selected and, if you import from a folder that has sub-folders, this will automatically create sub-categories in MYOB Intranet and import the items under the relevant sub-categories.
If this option is not selected, only the files in the specifically selected location are imported and no sub-categories are created.
5. Select the status of the document from the drop-down.
You can set the status as one of the following:

- **Published** — an item will only appear in MYOB Intranet if it has a Published status.
 - **Draft** — only administrators will see an item with the Draft status. Draft items display in the Status > **Draft** view in the **MYOB Intranet Administration** window.
 - **Deleted** — an item with the status Deleted will not display in the MYOB Intranet categories. This status is set if you do not want to permanently delete an item and you do not want it to display to any users. When you delete a Published item, it is initially set with the status Deleted. It then displays in the **Status** view in the “Administration left-hand panel” on page 28 under **Deleted** from where it can be permanently removed. See also “Deleting documents and items” on page 58.
6. Select the **Publisher** from the drop-down.
or
Click the **Publisher** icon to open the **Select Publisher** window to select the appropriate publisher. Click **OK**.
The Publisher is the name of the person or organisation from where the item originated. As well as MYOB Intranet staff members, this can also be organisations such as the Tax Office, MYOB or Bentleys. This displays on the MYOB Intranet Item View.
 7. Enter the **Author**.
The **Author** field automatically displays the name of the person logged in. This can be changed by typing the relevant name of the author of the items being imported.
 8. Select whether the imported items will **Expire** and the expiry date.
By default, items will not expire. You can set a date that the imported items expire by clicking the **Expires** checkbox and entering the date or selecting the date from the drop-down calendar. Once the specified date is passed, the items will no longer display in MYOB Intranet. They will still be visible in the **MYOB Intranet Administration** window and, if required, the date can be reset to re-display the item in MYOB Intranet.
 9. Select whether the item will be **Read Only**.
The default is Read Only. Items are normally held as Read Only so that users or administrators cannot make any changes to the original file. If you want the imported item to be editable, remove the Read Only selection.
 10. Select the **Indexing** option.
For items to be found by the “Searching” on page 17 or the “Advanced search” on page 18, you must perform indexing. This can be done as part of the import or at a later time. If you select **Indexing**, the system will perform the full text index as part of the import.

Note: If the import and index are run at the same time, you may find that the import is very slow. It is recommended that unless there are only a few items currently held in MYOB Intranet, you remove the selection for Indexing and then use “Reindex all documents” on page 80 to perform the indexing at a convenient time. The alternative is to leave the import and index to run overnight.

11. Click **Next**.

The **Type** tab displays. You use the **Type** tab to optionally select a Document Type and the Category in which to place the imported items.

12. Select the **Document Type** from the drop-down.

You can optionally select a Document Type for the imported items. This is used in the “Advanced search” on page 18.

13. Select a **Category**.

Note: When importing items you can only import to a single category. If any of the imported items relate to more than one category, this can be changed after the import for the individual items. See “Moving or adding an item to a different category” on page 57.

If you have highlighted a category in the left-hand panel, this is selected as a default but this can be deselected if required. Expand the hierarchy of categories to find the one you want.

If you do NOT select a category in the **Type** tab, the items are imported under the **No Category Assigned** view in the left-hand panel. After the import, the items can be moved to the required category (see “Moving or adding an item to a different category” on page 57).

If you have selected **Include all subfolders** on the **File Name** tab, and there are sub-folders in the location you have selected, the additional categories will be created automatically. The items will be automatically assigned to the newly created category that relates to the folder from which the item was imported.

14. Click **Finish**.

The files are imported and a message displays when the import has finished.

15. Click **OK**.

If any new categories are automatically added by the import, they are created with “All” Roles selected. If you are assigning roles to categories, you may need to amend the “Categories” on page 31.

Note: The system does not check if items have already been imported. If any files are imported more than once they will be added as new items. They will show with the same title and duplicates will need to be manually deleted.

Tip: To import an individual file, you can add it using “Adding a new item” on page 40 and select the **Create from Existing** option.

Related topics

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Exporting items

The **Export** function exports ALL the items in MYOB Intranet.

To export an item

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Click File > **Export**.
The **Export Documents** window opens.
3. Enter the drive and folder for the **Location**.

or

Click the ellipse button to browse for it.

Note: The **Location** is the top level folder on the server or your local disk below which the MYOB Intranet items will be exported. The folders and sub-folders are automatically created for each category in the MYOB Intranet structure under the location you specify.

4. Click **OK**.

When the export is completed, a message displays.

Related topics

[Opening and editing items](#)

[New items](#)

[Indexing new items](#)

[Stationery documents](#)

[Document properties](#)

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Applications

The **Applications** section displays at the bottom of the left-hand panel menu. It is a special Category that contains links to applications used by your business. This offers quick access to the applications that are used constantly.

In the **MYOB Intranet Administration** window, you configure the applications that will be available to team members. You can also configure application categories to group the applications.

Using “Roles” on page 74, you can place restrictions on who can access certain applications.

Adding a new application

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select the Application section (or an Application Category in the Application section) in the left-hand panel or select an item in the Application View.
3. Select File > **New Application**.
or
Right-click and select **New Application**.
or
Click the **New Application** button on the toolbar.

Note: Applications display in the Applications section in the sequence in which they were added in MYOB Intranet Administration.

The **New Application** window opens on the **Details** tab by default with the Application option selected and the associated fields available.

4. Enter a **Title** for the new application.
The Title displays in the Application section in MYOB Intranet.
5. Enter a **Description** for the new application.
The Description is optional and displays only in the Application window in MYOB Intranet Administration.
6. Select a **Location** for the new application.
Click the ellipse button to display the **Open** window. Select the folder and file name of the application you are including.
7. Click the **Roles** tab.
8. Click the checkboxes to select the **Roles** who will have access to the new application.
When an application is initially added, it is available to all roles and all team members can access it.
If you want to limit access to the application to certain team members, select the roles for which you want to allow access.

Note: When you have added applications, you may need to refresh MYOB Intranet to display them. Click the **MYOB Intranet** button on the MYOB Intranet Outlook toolbar (or press **[F5]**) or select Tasks Bar > Common Tasks > **Refresh**.

9. Click **OK**.

Opening an application

You can use **Open Application** to launch an application, for example, if you need to check you have accessed the correct file.

An application can be opened in a number of ways:

- Double-click the item in the Administration Item View.
- Right-click the application and select **Open Application**.

Editing an application

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select the Application section (or an Application Category in the Application section) in the left-hand panel or select an item in the Application View.
3. Right-click it and select **Properties**.
The **Edit Application** window opens on the **Details** tab by default.
4. Make the necessary changes within the **Details** and **Roles** tabs, as required.
5. Click **OK**.

Deleting an application

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select the Application section (or an Application Category in the Application section) in the left-hand panel or select an item in the Application View.
3. Right-click it and select **Delete Application**.
The link to the selected application is deleted.

Related topics

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[New items](#)

[Indexing new items](#)

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Application categories

Application Categories can be configured to group applications. Application sub-categories can also be added.

Note: Application categories display in the Applications section in the sequence in which they were added in MYOB Intranet Administration.

Adding an application category

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select the Application section in the left-hand panel.
3. Right-click it and select **New Category**.
The **Edit Application** window opens with only the **Details** tab available.
4. Enter a **Title** for the application category or sub-category.
The Title displays in the Application section in MYOB Intranet.
5. Enter a **Description** for the application category or sub-category.
The Description is optional and displays only in the Application window in MYOB Intranet Administration.

Note: When you have added application categories, you may need to refresh MYOB Intranet to display them. Click the **MYOB Intranet** button on the MYOB Intranet Outlook toolbar (or press **[F5]**) or select Tasks Bar > Common Tasks > **Refresh**.

Editing an application category

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select the application category.
3. Right-click it and select **Properties**.
The **Edit Application** window opens with only the **Details** tab available.
4. Edit the **Title** and **Description** fields as required.
5. Click **OK**.

Deleting an application category

Note: You will not be allowed to delete an application category that contains applications or sub-categories. These must be deleted before the category itself can be deleted.

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select the application category.
3. Right-click it and select **Delete Category**.
A MYOB Intranet message appears requesting confirmation to delete the application category.
4. Click **Yes**.

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Team members

The **Team Members** function contains all the users that have been configured for MYOB Intranet. This function controls logins, passwords and access to the system. It is also used for contact information that is displayed in MYOB Intranet in the “Team lists” on page 19 when team members click the **Team** button. Team members setup automatically

When team members initially access MYOB Intranet, the system verifies that they have been configured as a team member. The person's network login is used as the identifier. If a person has not already been configured as a team member, the system will automatically do so. Once a new team member is configured they are added to the Team List.

As an administrator, you may need to edit and complete the details. For example, if the convention for your Windows network login is “firstname.lastname” (e.g., joe.sample) the team member will be configured with joe.sample as the user name and login. This will be correct for the login, but you may need to edit the user name as this displays on the Team List. You can also add any other contact details and assign one or more roles to the team member (see “Roles” on page 74).

Adding a new team member

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select Maintenance > **Team Members** on the main menu.
The **Team Member Management** window opens on the **Details** tab by default.
3. Select File > **New** on the main menu of the **Team Member Management** window.
or
Click the **Add Team Member** button on the toolbar.
4. Enter the **User Name** of the team member.
This is the team member's full name which will display in the **Team List**.
5. Enter who the team member **Reports To** or select the person from the drop-down.

This will display in the **Team List**.

6. Enter the **Phone / DDI / Ext** of the team member.
This is the team member's phone number, direct dial and/or extension. This displays in the **Team List**.
7. Enter an alternative contact phone number for the team member in **Other Phone**.
This phone number is only displayed when the MYOB Intranet administrator accesses team member information.
8. Enter the **Mobile Phone** number of the team member.
This is the team member's mobile phone number. This displays in the **Team List**.
9. Enter the team member's **Email**.
This is the team member's email address. This email address is used if the team member is selected in the **Team List**.
10. Select one or more **Roles** as applicable for the team member.
The selected roles may determine which categories a person can access. See "Categories" on page 31.
11. Select the **Active** option.
A team member will only be able to access information in MYOB Intranet or be displayed in the **Team List**, if they are selected as **Active**.
12. Select the **Admin** option, if required.
A person will only be able to access the MYOB Intranet Administration if **Admin** is selected.
13. Click **Apply**.
To accept the changes and leave the **Team Member Management** window open.
14. Click the **Logon Details** tab.
The **Logon Details** tab is displayed.
15. Enter the team member's Window's logon name.
This is set as the team member's network login.
16. Enter the password used for login.
The password is only generally used for MYOB Intranet administrators. This is the password that the user will be prompted to enter when accessing MYOB Intranet Administration.
17. Click **Apply**.
To accept the changes and leave the **Team Member Management** window open.

18. Click **OK**.

The **Team Member Management** window closes and the new MYOB Intranet team member is added.

Editing a team member's details

1. Access the **MYOB Intranet Administration** window.
See "Administration and maintenance" on page 25.
2. Select Maintenance > **Team Members** on the main menu.
The **Team Member Management** window opens on the **Details** tab by default.
3. Select the team member's name from the **Name** list on the left-hand side panel.
The team member's details are displayed in the **Details** and **Logon Details** tabs.
4. Edit the team member's details as necessary in the **Details** and **Logon Details** tabs.
5. Click **Apply**.
6. Click **OK**.
The changes will be saved to the team member's details and the **Team Member Management** window closes.

Deleting a team member

1. Access the **MYOB Intranet Administration** window.
See "Administration and maintenance" on page 25.
2. Select Maintenance > **Team Members** on the main menu.
The **Team Member Management** window opens on the **Details** tab by default.
3. Select the team member's name from the **Name** list on the left-hand side panel.
The team member's details are displayed in the **Details** and **Logon Details** tabs.
4. Delete the team member.
This can be done in a number of ways:
 - Select File > **Delete**.
 - Click the **Delete Team Member** button.
 - Right-click the selected team member and select **Delete**.A MYOB Intranet message appears requesting confirmation of the deletion.
5. Click **Yes**.
This will permanently delete the team member and s/he will no longer be able to access MYOB Intranet and will no longer display in the Team List.

Note: You can also use the **Active** option to make the team member inactive without permanently deleting them.

Making a team member inactive

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select Maintenance > **Team Members** on the main menu.
The **Team Member Management** window opens on the **Details** tab by default.
3. Select the team member’s name from the **Name** list on the left-hand side panel.
The team member’s details are displayed in the **Details** and **Logon Details** tabs.
4. On the **Details** tab, deselect the **Active** option.
5. Click **Apply**.
6. Click **OK**.
The team member will become inactive and will not be able to access MYOB Intranet. The **Team Member Management** window closes.

Making an employee an Intranet Administrator

Note: To make an employee an Intranet Administrator, you need to log onto MYOB Intranet as a user with Intranet Administrator rights.

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select Maintenance > **Team Members** on the main menu.
The **Team Member Management** window opens on the **Details** tab by default.
3. In the **Name** column, select the employee that is to be made an administrator.
4. Select the **Admin** checkbox on the **Details** tab.
5. Click **Apply**.
6. Click **OK**.
The selected employee has Intranet Administrator rights.

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Roles

Roles are used to limit access to various areas of MYOB Intranet.

Roles are configured that are relevant for your own business. One or more roles can then be allocated to team members. Specific roles can be selected for the “Categories” on page 31 and “Applications” on page 65. This means that only team members with that role will have access to that category in MYOB Intranet or to that application when accessed via MYOB Intranet.

Team members, categories and applications can be configured from the **Roles** dialog. Roles can also be configured from the **Roles** tab in the category or from the **Roles** tab in the application.

In each of the tabs of the **Roles** dialog, all the current team members, categories and applications are displayed. If any of these are deleted from the system they are automatically removed from the **Roles** dialog.

Adding a new role

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select Maintenance > **Roles** on the main menu.
The **Roles** window opens on the **Team Members** tab by default.
3. Select File > **New** on the main menu of the **Roles** window.

or

Click the **Add Role** button on the toolbar.

4. Enter the **Name** of the role.
5. Click **Apply**.
The new role is added to the **Roles** list and the **Roles** window remains open.
6. Select whether the role is an **Administrator** one or a **Test Admin** or both
Click the appropriate checkbox(es).
7. In the **Team Members** tab, select the team member(s) that are assigned to the selected role.
A team member can belong to more than one role.
8. Click the **Categories** tab.
9. Select the appropriate categories that relate to the selected role.
By default, a role has access to **All** categories. But a role can be assigned with access to specific categories.
10. Click the **Applications** tab.
11. Select the appropriate applications that are relevant to the selected role.
By default, a role has access to **All** applications. But a role can be assigned with access to specific applications.
12. Click **Apply** to save any changes and the **Roles** window remains open.
or
Click **OK** to save any changes and close the **Roles** window.

Editing a role

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select Maintenance > **Roles** on the main menu.
The **Roles** window opens on the **Team Members** tab by default.
3. Select the role from the **Roles** list.
4. Edit the role as necessary in the **Team Members**, **Categories** and **Applications** tabs.
5. Click **Apply** to accept any changes and the **Roles** window remains open.
or

Click **OK** to accept any changes and close the **Roles** window.

Deleting a role

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select Maintenance > **Roles** on the main menu.
The **Roles** window opens on the **Team Members** tab by default.
3. Select the role from the **Roles** list.
4. Select File > **Delete**.
or
Click the **Delete Role** button.
A MYOB Intranet message appears requesting confirmation to delete the Role.
5. Click **Yes**.
The role is deleted from the **Roles** list.
6. Click **OK**.
The changes are saved and the **Roles** window closes.

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Document types

Document Types can be used to categorise items and they can be configured as required for your own business.

When adding and importing items, you can allocate a document type to items. From MYOB Intranet Administration, you can display items by type from the Document Types view in the left-hand panel. In MYOB Intranet, team members can select **Document Types** as filters in the search criteria in “Advanced search” on page 18.

See the [MYOB Document Manager help](#) for more information on Document Types.

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Configuration

The Tools > **Configuration** option contains general MYOB Intranet settings. These are nominally configured during the installation of MYOB Document Manager and MYOB Intranet.

Note: The settings in the configuration would NOT usually be changed after installation.

To configure MYOB Intranet settings

1. Access the **MYOB Intranet Administration** window.

See “Administration and maintenance” on page 25.

2. Select Tools > **Configuration** on the main menu.

The **Configuration** window opens.

3. Enter the **Contents Path**.

or

Click the ellipse button to open the **Browse For Folder** window to find and select the appropriate location.

The **Contents Path** is the location where the MYOB Intranet data is held. This is specified as part of the MYOB Intranet installation. All the documents and other files for the MYOB Intranet content are stored in one folder. This would usually be a server location.

When a file is added or imported, it is assigned a unique, internal “GUID” identifier. The file is stored in the folder specified in the Contents Path.

4. Enter the **Server Name**.

This is the name of the SQL server. This is specified as part of the MYOB Intranet installation. This database holds the links to and the settings for all the MYOB Intranet items.

5. Enter the **Login Name** and **Password**.

This is the default login name and password for the MYOB Intranet database.

6. Enter the **Database**.

This is the name of the MYOB Intranet database.

7. Click **OK**.

The **Configuration** window closes and the configuration details are updated.

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Merge settings

Merge Settings are used in the merge function when a creating documents and selecting the contact whose details can be merged into the document.

Note: You should only select **MYOB Document Manager** as the integrated system with MYOB Intranet.

To configure contact merge settings

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select Tools > **Merge Settings** on the main menu.
The **Contact Merge Settings** window opens.
3. Select **MYOB Document Manager** from the drop-down.
The default file location where the merged documents are saved will be determined by Document Manager.
4. Click **OK**.
The **Contact Merge Settings** window closes.

Related topics

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Reindex all documents

Reindex All Documents is used to recreate a full text index which is used for full text search functionality. All the MYOB Intranet items and their content will be scanned to create the index.

Note: You need to run this only if you had imported documents without selecting the **Indexing** checkbox.

To reindex all documents

1. Access the **MYOB Intranet Administration** window.
See “Administration and maintenance” on page 25.
2. Select Tools > **Reindex All Documents** on the main menu.
A message displays to inform you that, depending on the number of items being reindexed, the process may take a long time to complete.
3. Click **Proceed** to continue.
When the reindexing has finished, a message displays “Full Text Catalogue has been rebuilt”.

Note: Depending on the number of items in MYOB Intranet, the reindexing process may take hours to complete. You will not be able to perform any other functions in the **MYOB Intranet Administration** window until the indexing is completed. You may decide to leave the indexing until a convenient time or leave it to run overnight.

Related topics

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[New items](#)

[Indexing new items](#)

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[Document properties](#)

[Maintaining multiple versions of items](#)

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