

# HowNow File Naming Protocol

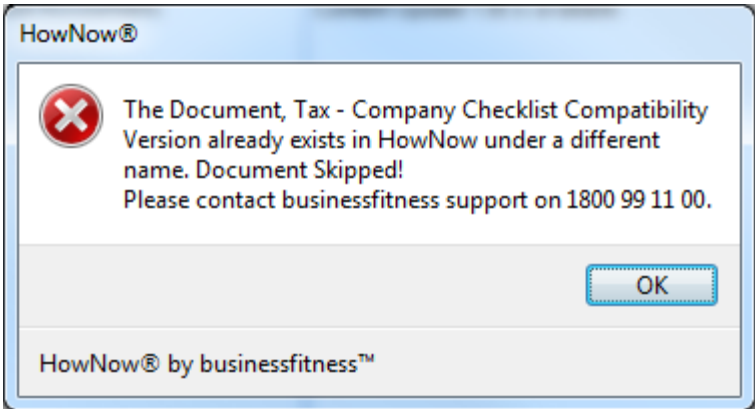
*Hints and tips on File Naming within HowNow*

## Knowledge Manager File Naming:

When adding your own procedures, templates or reference material to the Knowledge area of HowNow, you are able to name these files as you wish. Obviously the more descriptive you are the easier it will make it for your team might to find these documents.

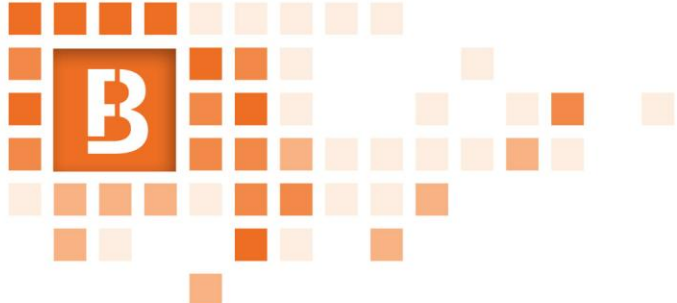
When editing or modifying an existing HowNow procedure or template, please DO NOT rename any of these documents. When we publish the monthly content update; it looks for these title names. If you have changed the file name, HowNow will throw an error because it can not find the title name.

Here's an example of what an error might look like:



If you would like to create a similar template to a HowNow document our recommendation is to edit it and create a new edition of that document. Alternatively, you can duplicate that document and use it as a base for a new template.





## Records Manager Filing Naming: (Applicable only if the Records & Email Manager is installed).

### Default Record Title

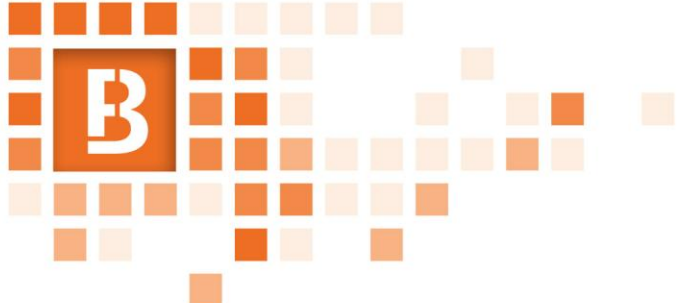
This feature allows you to automatically customise an individual record title from a HowNow Knowledge template. Placing embedded functions and fields within the default record title field will automatically populate the title of this record when it is created. A list of the embedded functions and fields is shown below.

The screenshot shows the 'Advanced' configuration tab for a record. It contains several sections:

- Document Options:** A group of checkboxes including 'Document Has Merge Fields', 'Automatically File', 'Clear Description on Record', 'Clear Keywords on Record', 'Open as an Editable', 'Add to Favourites', 'Add to Review List', 'Record is Versioned', 'Document is Active', and 'Document Has Been Modified'.
- Expiry Date:** A date input field with slashes and a dropdown arrow.
- Action:** A dropdown menu currently set to 'Warning Message'.
- Owner:** A text input field.
- Author:** A text input field containing 'AA'.
- Approval Status:** A dropdown menu currently set to 'Approved'.
- Content Module:** A table with two columns: 'Module' and 'Content Release'. The first row contains 'OUR CONTENT' and '1'. There are 'New' and 'Remove' buttons to the right of the table.
- Style Template:** A dropdown menu currently set to 'No Style Template'.
- Default Record Title:** A large empty text input field at the bottom.

Adding an asterisk \* to the Default Record Title will force users to change the record title when saving the document. For example, you may want to do this with the 'blank documents' to avoid having numerous records with the title 'Blank Document'.





### Embedded Functions and Fields

If HowNow encounters text enclosed in square brackets in a title, it replaces the text with its translated value. For example, [YYYY] is translated into the current year.

**Note:** if the text between the square brackets cannot be translated, HowNow removes the text and the square brackets.

Following is the full list of possible functions and fields:

[RECORDID] – the record ID number

[YYYY] - the current year

[FY] - the current financial year in the form YYYY-YYYY. For example, 2009-2010

[MM] - the current month

[DD] - the current day

[DD-MMM-YYYY] - today's date in the form Day-Month Name-Year

**Note:** the use of the slash character is not allowed as it is illegal in a title.

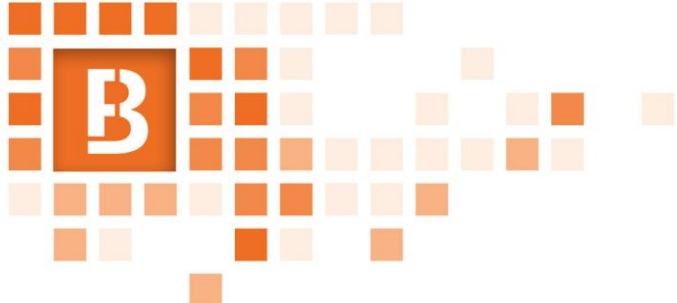
[DD-MM-YYYY] - today's date

**Note:** the use of the slash character is not allowed as it is illegal in a title.

**Note:** any date variation is possible. For example, [YYYYMMDD] would embed the date in reverse order.

[CONTACT FIELD NAME] - any field from the contact details. For example, [ENTITYNAME] inserts the contact's entity name.

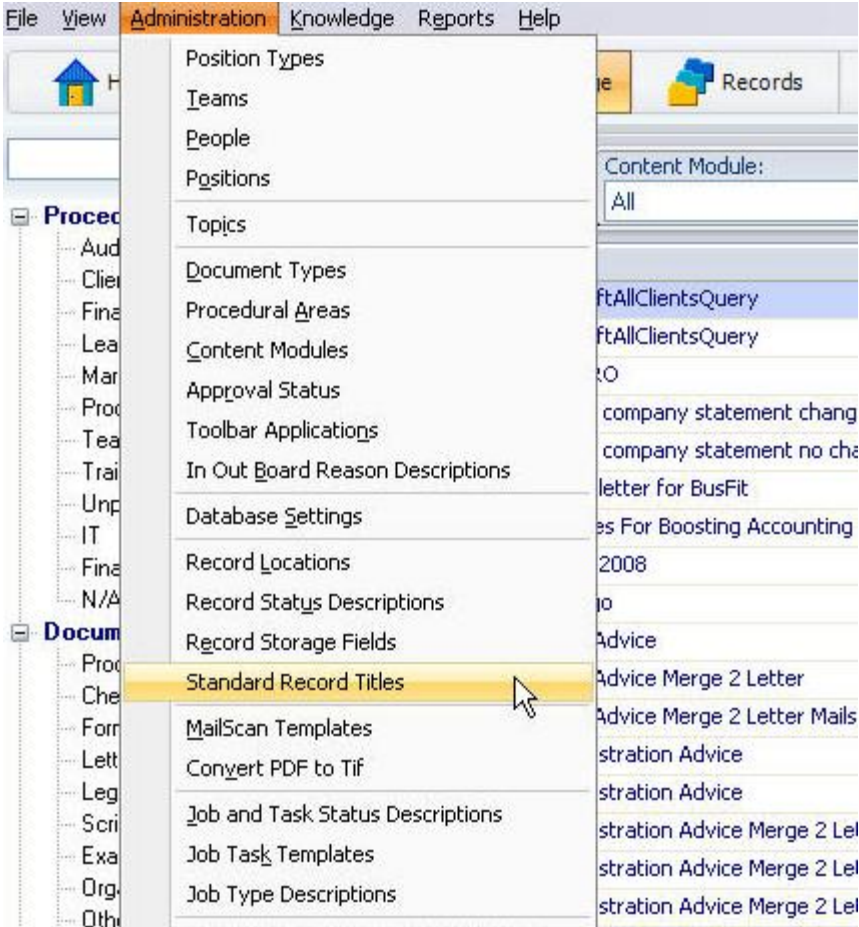




### Standard Record Titles

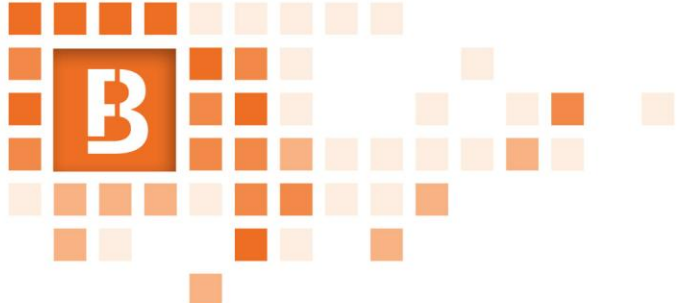
This feature allows a list of standard record titles to be created and stored in the HowNow database. These titles can then be selected from a drop-down list when filing a record.

Various fields and functions can be embedded in standard titles to automatically customise them. For example, inserting [YYYY] in a title will result in the current year being embedded when the record is created. This means that a new title doesn't have to be created each year. See below for a full list of fields that can be embedded in any record title.



Note: You can use the embedded fields in the title of a document when saving a record without a standard title.

Following are some examples of recommended standard record titles.



### Filing Name Conventions for Accounting Firms

Letters, checklists, questionnaires and workpapers	Standard names taken from the template name in HowNow. This will make retrieving these documents easier. Firms can change the file name by editing the profile of the template and in the advanced tab change the Default Record Title.
Emails	Email [EmailType] [EmailContact] [EmailSubject] <Work Type> <Period> - note the items in [ ] are embedded fields taken from the email itself.
Scanned Documents	<Work Type> <Subject> <Period>
Work Type	Tax / Acct / FP / Corporate / Tax Planning
Subject	<p>Year end          NOA (Notice of assessment)          BAS          CGT          FBT          SMSF          GST          ABN          IAS          ITR (Income tax return)          PAYG          Minutes          Annual statement          Business name          Change of details          Client queries          Advice (provide additional details where non-standard work – a full description and key words need to be entered)          Non standard work (provide additional details – a full description and key words need to be entered)</p>
Period	<p>Qtr – Sept &lt;Year&gt;          Qtr – Dec &lt;Year&gt;          Qtr – Mar &lt;Year&gt;          Month - &lt;Month Year&gt;          Year Ended – June &lt;Year&gt;          Interim to &lt;Month Year&gt;          Date</p>

