

HowNow Administrator Checklist

1. Monthly Tasks – Knowledge

1. Have you added any new documents that need to be approved?
2. Have you run the latest content update and reviewed the new documents?
3. Do any existing procedures or templates require updating?
4. Do you need to update or edit any existing Merge 2 letters?
5. Have you inactivated any documents that are no longer required?
6. Do you need to modify, add or delete any topics in knowledge?
7. Have you run the content utilisation report for the month?
8. Are there any HowNow software updates to be completed?

2. Monthly Tasks – Records

1. Do you need to create any new standard record titles?
2. Have you run the monthly records utilisation report?
3. Have you reviewed your accepted file types?
4. Do you need to update excluded domains for emails?

3. Monthly Tasks – Options

1. Do you need to update any existing user profiles?
2. Do you need to review the recycle bin?
3. Do you need to update any of your system option settings?
4. Have you checked that the database refresh is working correctly?
5. Are there any HowNow software updates to be completed?

4. Monthly Tasks – Employees

1. Do you need to update any existing user profiles?
2. Do you need to deactivate any employees?
3. Do you need to review any position types?
4. Do you need to update team members security?

5. Annual Tasks

1. Do you need to review your filing structure for the new year?
2. Is everyone on the latest add-ins?
3. Do you need to add team security to any new folders?
4. Do you need to change any passwords on team security?
5. Do you need to update any team member privileges?