



Assign Intranet security roles to users

Welcome to CCH Business Fitness content in CCH iFirm Intranet. When your Intranet module becomes active, your first tasks as an administrator in iFirm will be to add users to the system (if not already setup) and assign Intranet security roles.



Think about your team and decide what action a user can perform in the Intranet:

1. **View** – this is a limited role which only allows the user to view content within the Intranet
2. **Add & edit news items**
3. **Add & edit content**

Visit the iFirm help centre for specific help on how to [add users](#) and [assign security roles](#).

Get familiar

As a CCH Business Fitness subscriber, you'll get access a range of useful content that is updated automatically by the Business Fitness team. We recommend spending some time familiarising yourself with our content before launching with your team. Either [download the content guide](#) or browse our content within iFirm.

To access CCH Business Fitness content in iFirm:

1. Click on the **Intranet link** on the iFirm left hand menu.
2. This will take you to the Intranet homepage featuring:
 - a. **Search box** – to locate content
 - b. **News** – add and edit news here for your firm
 - c. **Publisher content updates** – view our latest content updates and news from the team at Business Fitness.
3. The **Business Fitness menu** is located on the right side of the screen under the **Publishers** menu.
4. Hover over the **Business Fitness logo** to view menu items.



Customising content

So you've subscribed to Business Fitness content and now you want to customise some documents to perfectly fit with your firm. You may wish to add an additional step to a procedure, change a paragraph in a letter template or configure the settings in the Excel electronic workpapers so they integrate with your GL software. Simple – just follow these steps to customise Business Fitness content:

1. Click **Intranet** (left hand menu) and click **Content** on the (right hand) Intranet menu.

[Content] [Menu]

2. Search for the item you want to edit.

All Content Draft Content Hidden Content Controlled Content

Search Content > All Content

3. Click the **Edit** icon – and the **Edit Content** page will open, with a notice that the content is only editable by the publisher.

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4. Click the **Take Control of Content** button

Take Control of Content

5. Click **Yes** to confirm you wish to take control of the content.

6. Now **edit** or **replace** the document depending on the format of the content:

HTML Content – the web page will open the HTML editor to allow you to edit the page. [Learn more about the HTML editor.](#)



External Documents – Replace CCH Business Fitness document by uploading your version of the document.

Replace Content

File Upload: No file chosen

Description:

Status: Tags: [Tell me more](#)



External Website Links – Replace the CCH Business Fitness URL link with your link.

URL:

7. Click **Save**



Tip: If you have taken control of a document, you will need to manually review and apply any future updates. This feature prevents our content updates automatically overwriting your controlled content. See the next section for further help on this topic.

Manage Content Updates

While you focus on your business, our team is busy updating the Business Fitness content to keep it fresh, accurate and relevant. Each month we'll publish new content and keep you informed via our Working Smarter email newsletter or check out our news section on your iFirm Intranet homepage.



Register to receive the Business Fitness Working Smarter newsletter.

The beauty of iFirm Intranet, is that our content updates will automatically appear in your Intranet unless your firm has taken control of the document. If your firm has taken control of the document, follow these steps to review and apply an update:

1. Go to **Settings > Intranet > Content Updates** for a list of content that requires your approval.
2. Review the differences between your version of the document and our latest version.
 - a. Click Open Update to open the Update Document Properties window, then click OK to view the updated content.
 - b. Click Open Existing to open your edited version of the document. Save the file to your desktop if you think you want to make the same changes to the new updated content.
3. Choose one of the following actions:
 - a. Apply update – to replace your edited version of the content with the updated version from us.
 - b. Ignore update – to ignore the update and continue using your version of the document



Tip: If you chose to apply the update but now want to make your firm's changes to the new document, refer to the customising content steps above.

Top 3 tips for iFirm Intranet Administrators

Create your own Intranet navigation menu, in just a few clicks!

iFirm Intranet gives you the flexibility to create your own menu items that link to content pages in your Intranet. This is a great option if you want to customise the menu to work for your firm. View this [help article](#) for step-by-step instructions.

Add your own keywords

You can make content easier for your team to find by adding custom keywords. For instance, if you add content such as the Inland Revenue newsletters to your firm's knowledge base, enter keywords into the Alternate Title field.

View this [help article](#) for step-by-step instructions.

Content Settings

Content Title:	Agents Answers issue 206 October 2017
Alternate Title:	Agents Answers issue 206 October 2017 Sharing information to fight global tax evasion Foreign Account Tax Compliance FATCA Common Reporting Standard CRS Accounting Income Method AIM provisional tax My GST updates client addresses online RealMe login Approval for deductions for payments to

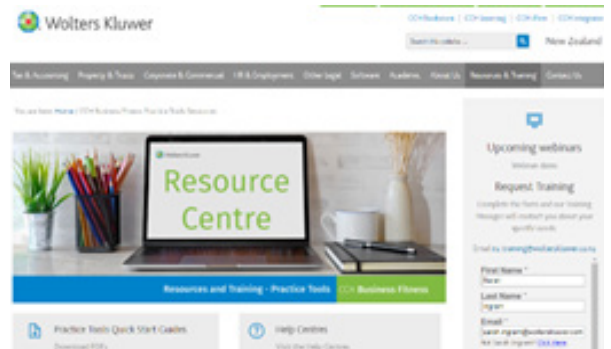
Bookmark this site!

New to Business Fitness and don't know where to start?

Check out our online Resource Centre to learn how to make the most of your Business Fitness content. You can also register for complimentary webinars, watch bite sized training videos and access our useful online help centres.

[Bookmark this site for quick reference!](#)

<http://www.wolterskluwer.co.nz/cch-business-fitness-practice-tools-resources/>



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Need more help?

Visit the [CCH iFirm Intranet online help centre](#)

support@businessfitness.co.nz

[Visit our website](#)