Beehive

Documents

Getting you up and running with Beehive Documents

Beehive Documents

Beehive Documents enables you to rapidly create documents from templates without the hassle of manually editing a Word file. With Beehive Documents you can prepare lengthy documentation in minutes, with improved consistency of language across documents, easily accessible document templates.

This guide will help you quickly get up and running with Beehive Documents but if you have any queries, or if you would like to create your own templates please reach out to us at beehive@ey.com.

Contents

1. Beehive Documents

Beehive documents allows you to rapidly create documents from templates, as well as any other project documentation. You can create documents such as letters, service agreements and project documentation in minutes, with increased quality and consistency of output across users. Documents can be assigned to project team members, and reviewed quickly and easily within the tool.

2. Navigating to Documents

Beehive Documents is accessed from within any Beehive Project. Simply open a project and select the 'Documents' link from the left-hand menu.
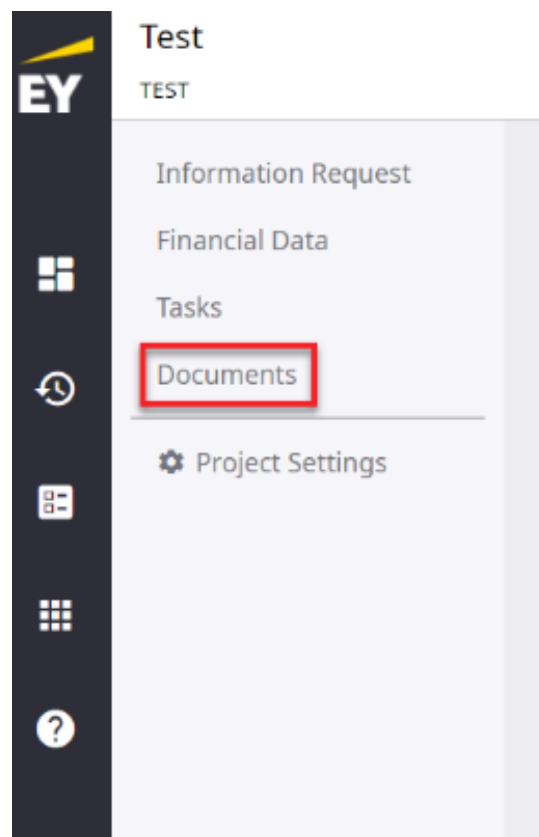
3. Project Documents

Documents created within your project can be viewed within the 'Project Documents' table.

a. Search

You can search by the document title

b. Title

The document name

c. Status

Status shows if the document is 'draft' or 'complete'. If complete is selected the document will be locked for further editing.
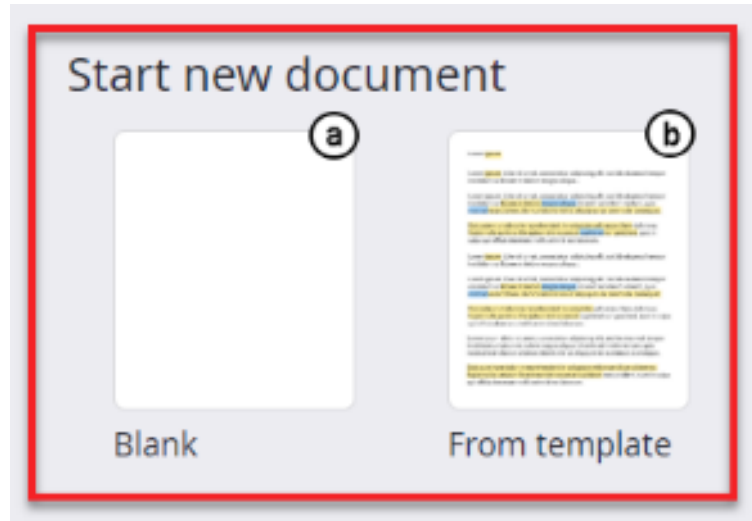
d. Assigned to

The project member that the document is assigned to

e. Last Edited

The date of the last edit to the document (DD/MM/YYYY).

4. Start a New Document

You have the option to start a blank document or create one from a published template.
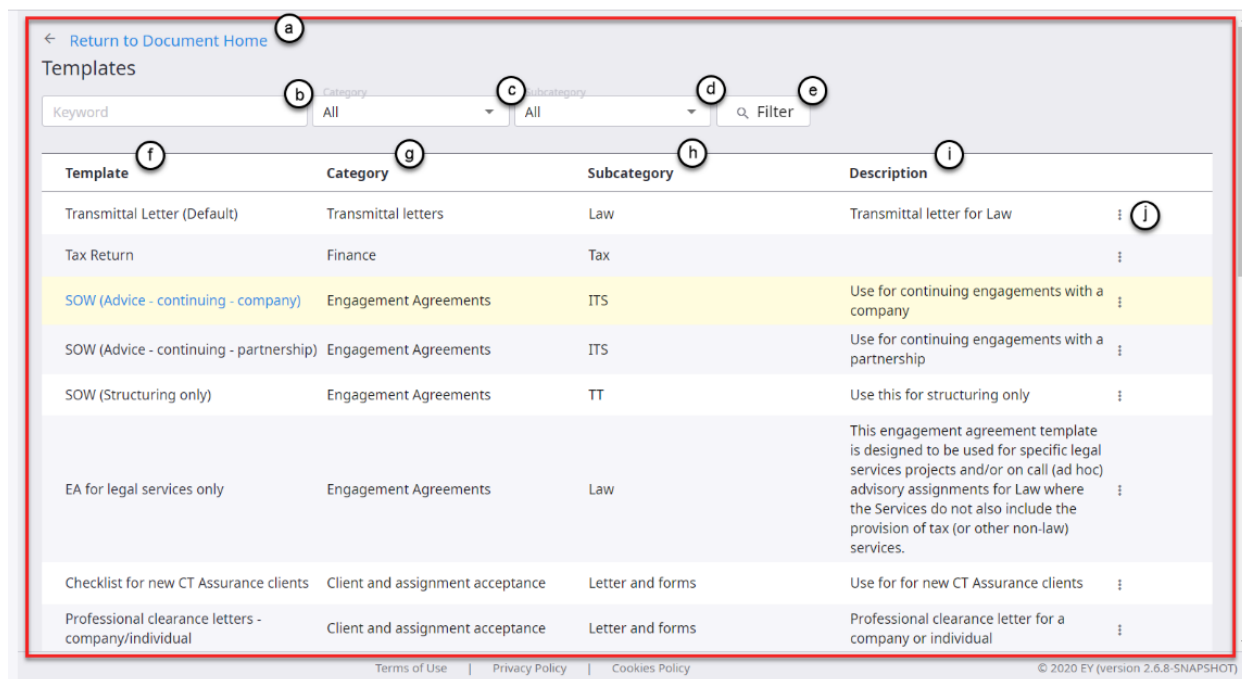

a. Create a Blank Document

Create a document from scratch using the 'Blank' tile.

b. Create a Document from a Template

Create a document from a template by selecting the 'from template' tile to open the template library.

5. Selecting a Template

Filter and search the template library to find the correct template for your needs.

a. **Return to Documents Home**

   Close the template library and return to the previous page

b. **Search for a specific template**

   Keyword search based on template name

c. **Category (filter)**

   Select a category to filter search results. You can select one, all or a selection by checking the boxes.

d. **Sub-category (filter)**

   Select a sub-category to filter search results once a category has been selected. You can select one, all or a selection by checking the boxes.

e. Filter

Apply the category and sub-category selections to the search results.

f. Template

Template names.

g. Category

Select a category to filter the listed templates.

h. Sub-category

Select a sub-category to further filter the listed templates.

i. Description

Template details, such as advice on when to use a template.

j. Preview Template

Preview a template by selecting the menu option to the right of the templates table and selecting preview from the dropdown.

6. Create a Document

Documents are drafted within the document editor. The first step in creating a document is to complete the questionnaire.

a. **Question**

The questionnaire is located on the left-hand side of the page. Questions are numbered and are one of two types: Text input or Multiple-choice. Each question is related to one (or more) variables within the document on the right-hand side of the page. These variables are highlighted in yellow. Your answers to questions will define how these variables are populated.

b. Question Response

Text input questions require a manually typed or pasted input from you. Multiple-choice questions require you to select a pre-defined option from the drop-down menu.

c. Highlight answers (all answers)

The highlight answers toggle highlights, in green, where question answers affect the document on the right-hand side of the page. For text input questions, your response is highlighted. For multiple choice questions, your selection will populate the document with pre-defined text relating to your selected answer. Text removed because of your response will be also be highlighted and will be struck through.

d. Highlight answers (individual answers)

Using the highlight individual answers toggle you can highlight individual question responses within the document.

7. Manually Edit the Document
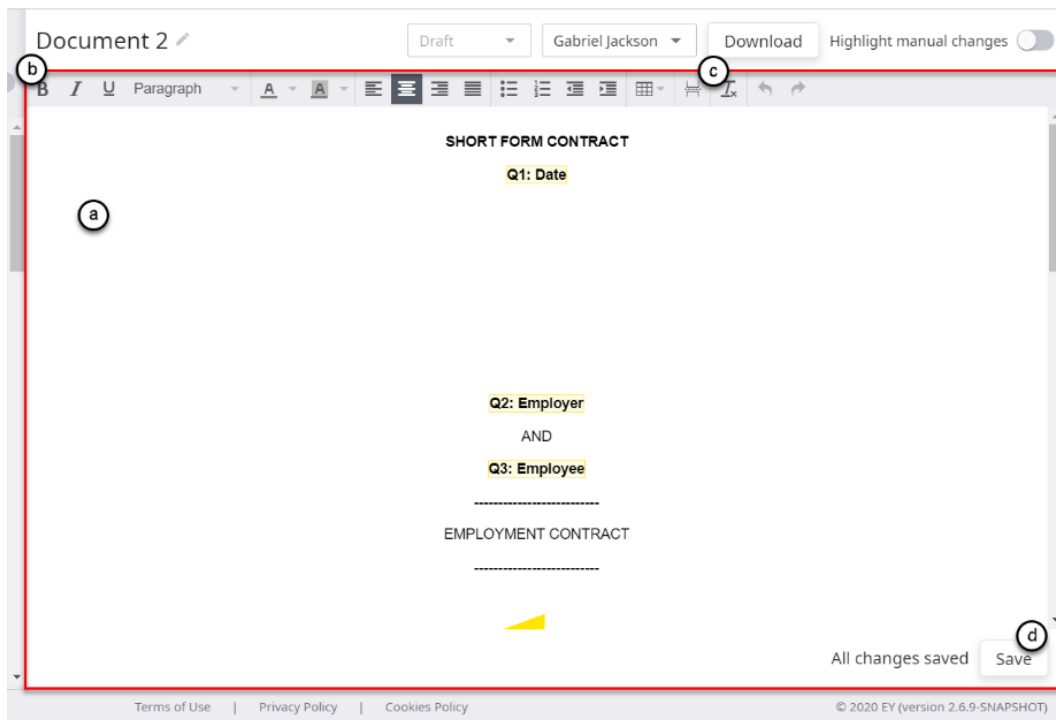
a. Manually edit the document

You can make manual edits to the document by selecting anywhere with the editor on the right-hand side of the page and editing as you would in Word.

b. Formatting

Standard formatting options such as **B,** *I*, U are available; advanced formatting should be completed in Word after the content has been prepared in Beehive Documents.

c. Page breaks

If required, you can add page breaks to your document. The appear as a dotted line block within documents but will resolve to a new page once the document is downloaded to Word.

d. Save & Autosave

The save document button is located to the bottom right of the editor. An autosave feature is also in place which will save the document every few seconds. This cannot be disabled.

8. Further Review and Workflow Options

a. Document name

You can view the document name above the editor. This will begin with a default name for new documents. To rename, simply click the edit icon to the right of the name and type in your desired name.

b. Document status

The status of the document can be seen above the editor. The default status is 'draft'. You can change the status to 'complete' once all questions have been answered. Note: If a text answer is not applicable then please answer with a space.

c. Document assignee

Document Assignee can be viewed above the editor. For new documents the assignee will default to the document creator. You can choose another assignee by selected a name from the dropdown. This will be reflected in the Project Documents page so that the project team can keep track of document accountabilities.

d. Download document

At any point during the document creation process you can download the document. This will download an MS Word version of the document. Note: You must save the document at least once before downloading.

e. Highlight manual changes

You can highlight manual changes within the document by selecting the 'Highlight manual changes' toggle above and to the right of the editor. This will apply to any changes that you have made which differ to the default template text. Changes will be highlighted in red.

9. Glossary

Creator   Templates are created and published by Creator users

Document   Documents are stored within projects on the Project
                       Documents page; these are based on templates or
                       begin as blank documents

Document Editor   The right-hand window which shows the document
                       content and formatting options

Manual change   A change made to the template text in the Document
                       Editor; text can be added or removed

**Multiple choice
answer**   A drop-down field where your selection will determine
                       the content populated in the document

Template   A template is comprised of the document content and
                       questionnaire

Template Library   Creators publish templates to the Template Library for
                       Preparers to use

Text input	The text you enter will be populated in the document
Preparer	Documents are created by Preparer users within projects
Project Documents	The overview page which shows all project documents, their status and who each document is assigned to
Questionnaire	The left-hand window which shows the questions to be completed to populate the document