HowNow Administrator Checklist

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 updated to be completed? ☐

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? ☐

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? ☐

Monthly Tasks - Employees

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

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? ☐