

System Admin: Firm Details Setup

Version V3.20.05: 10 August 2012

Office / System Admin UserGuides

Administration UserGuides are divided into two groups: **Office** and **System**. The difference is that all Users can modify **Office Admin** functions, whereas only someone with System Administrator privileges can modify **System Admin** functions.

Office Admin functions are:

- 5.1 Managing Value Lists
- 5.2 New TeamWork Templates
- 5.3 Managing Profiles

System Admin functions are:

- 5.4 Firm Details Setup
- 5.5 Office Settings
- 5.6 Users & Privileges
- 5.7 Custom DDNA & System DDNA
- 5.8 Creating Project Guides

Customizing the “look & feel” of your documents

You can customize your company’s iProjects platform using **System Admin: Firm Details Setup**. Access to this layout is limited to the System Administrator role.

Firm Details

iProjects provides for extensive latitude in “branding” your documents. The top of every printable form is yours to create your firm image – a space 535 pixels wide by 70 pixels high. This image is loaded only once, on the **Firm Details** page, and is automatically visible on every document.

Similarly, there is a footer space on every printable document that will take 3 or 4 lines of text (depending on how large a font you want to use for your firm name), by the full width of the page.

NOTE: You can have multiple footers if necessary, for example where the firm has multiple office locations. Office locations are assigned to users, so that all users in any one office will have the same footer information on the version of the forms they use.

The office name and address will appear in the downloadable forms under **Stage Tools** and **Common Tools** on the DDNA screen.

Instructions are provided in the **green text** on the layout.

Email | **Contacts** | **Projects**

Office Admin | **System Admin** |

Firm Details | **Office Settings** | **Users** | **Custom DDNA** | **System DDNA** | **Project Guides**

Home screen header: Appears at the top of all system screens, layouts.

Firm Address:
 Used as the Internal Project Address.

Firm Logo:  [New](#)

Office Locations:

<p>YOUR FIRM NAME GOES HERE</p> <p>YOUR FIRM ADDRESS GO HERE Full width of page is available. See HOME > System Admin</p>	<input type="checkbox"/>
<p>YOUR FIRM NAME GOES HERE 2</p> <p>YOUR FIRM ADDRESS GO HERE Full width of page is available. See HOME > System Admin 2</p>	<input type="checkbox"/>

To use the Firm Logo feature, click the Logo field and from the dialog box select the logo that you want to upload. Maximum size: 535 pixels wide by 70 pixels high. When iProjects is running on both PCs & Macs logo must be updated on a PC.

The text for one location goes at the bottom of all printable forms. You specify that location by assigning an Office Location to each user.

Do not alter the dimensions of this - it's the maximum that the layouts can handle.

You can change the font type, font size, color, plain/bold, etc., as long as you stay in the space provided - just use the tools in Format in the FileMaker main menu bar at the top.