

# Drake Documents Handout





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# Workflow Tools

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This section reviews the following:

- Drake Documents
- Drake Portals
- Backup/Restore

## Drake Documents

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Use Drake Documents, Drake Tax's document manager, to store and organize documents as PDF copies of tax returns, scanned Forms 8879 and 1099-B, and scanned copies of driver's licenses, Social Security cards, and other forms of ID. Think of Drake Documents' file structure as a virtual filing cabinet where files are saved within folders and folders are stored in drawers of the cabinet.

### Choosing a Default Cabinet

Before using Drake Documents, review each cabinet type and select a cabinet for software integration.

Select the **Working Cabinet** to view and store files for the current tax year in one location.

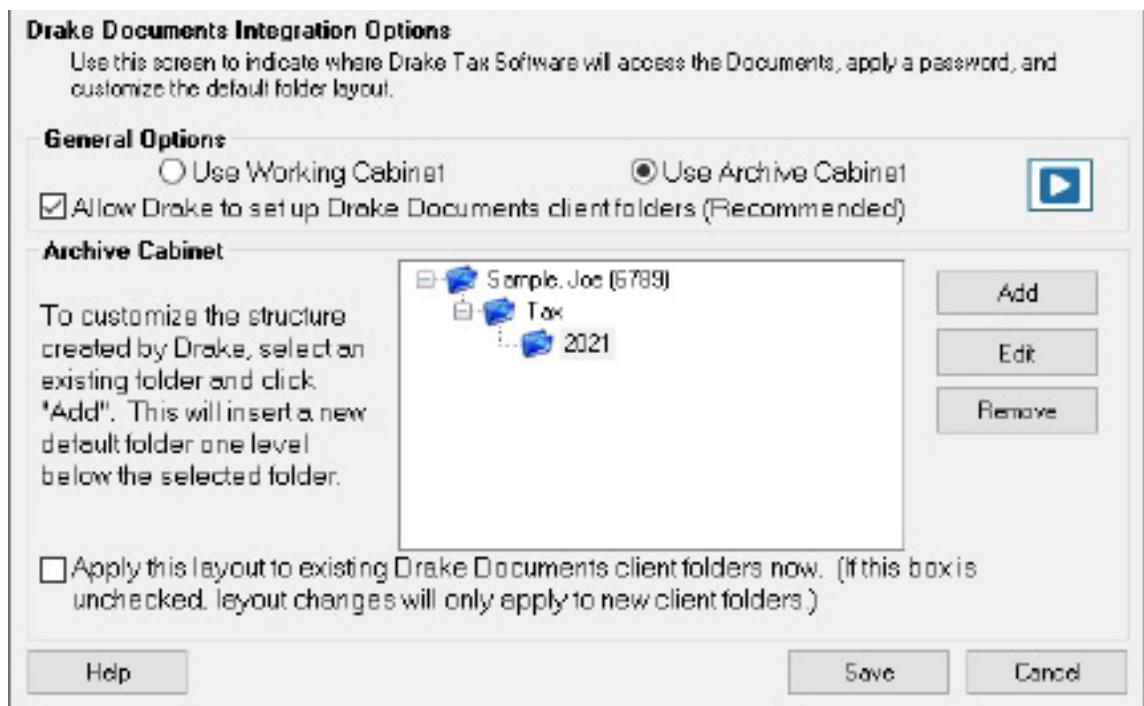
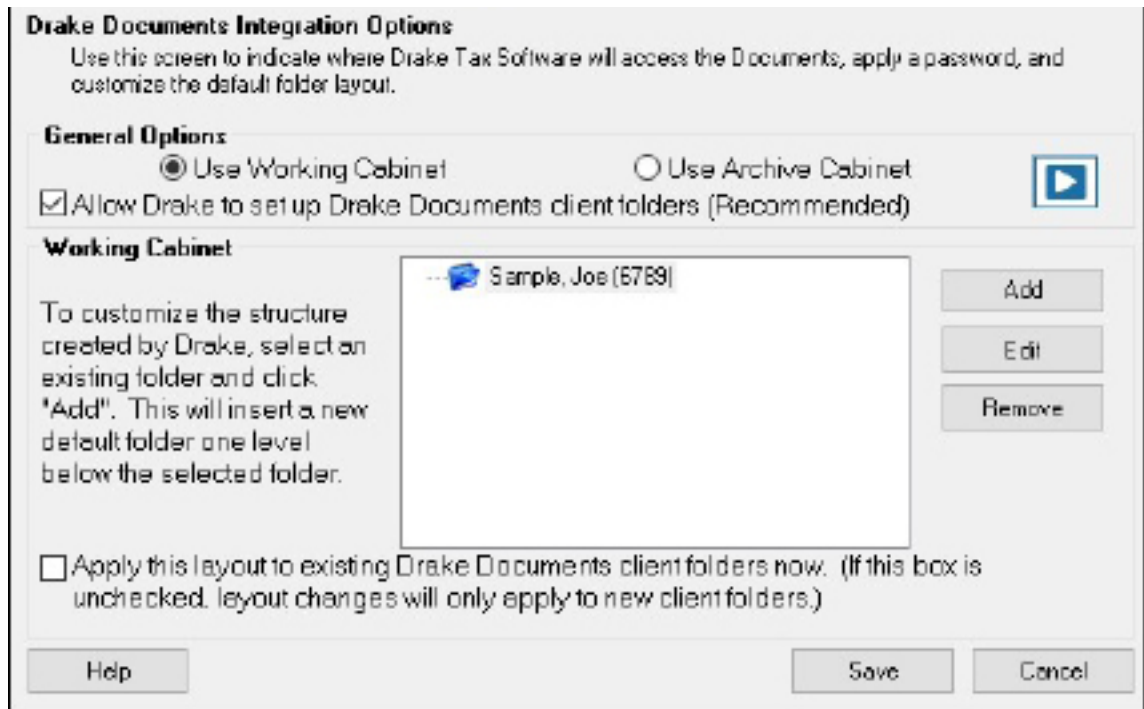
- No separate installation required
- Displays folders and files for current tax year only
- Accessible only from within the tax software

Select the **Archive Cabinet** if multi-year storage is preferred.

- Works as a standalone application
- Displays clients, folders, and files for multiple tax years
- Files stored in a location separate from the tax program

# Drake Documents Integration Options

- To access the document manager setup, from the **Home** window menu bar of Drake Tax, go to **Setup > Printing > Drake Documents**. Select **Use Working Cabinet** or **Use Archive Cabinet**.
- For either cabinet, we recommend that you select **Allow Drake to set up Document Manager Client Folders**. That way, your Drake Documents is integrated with the tax program and client files are automatically created.

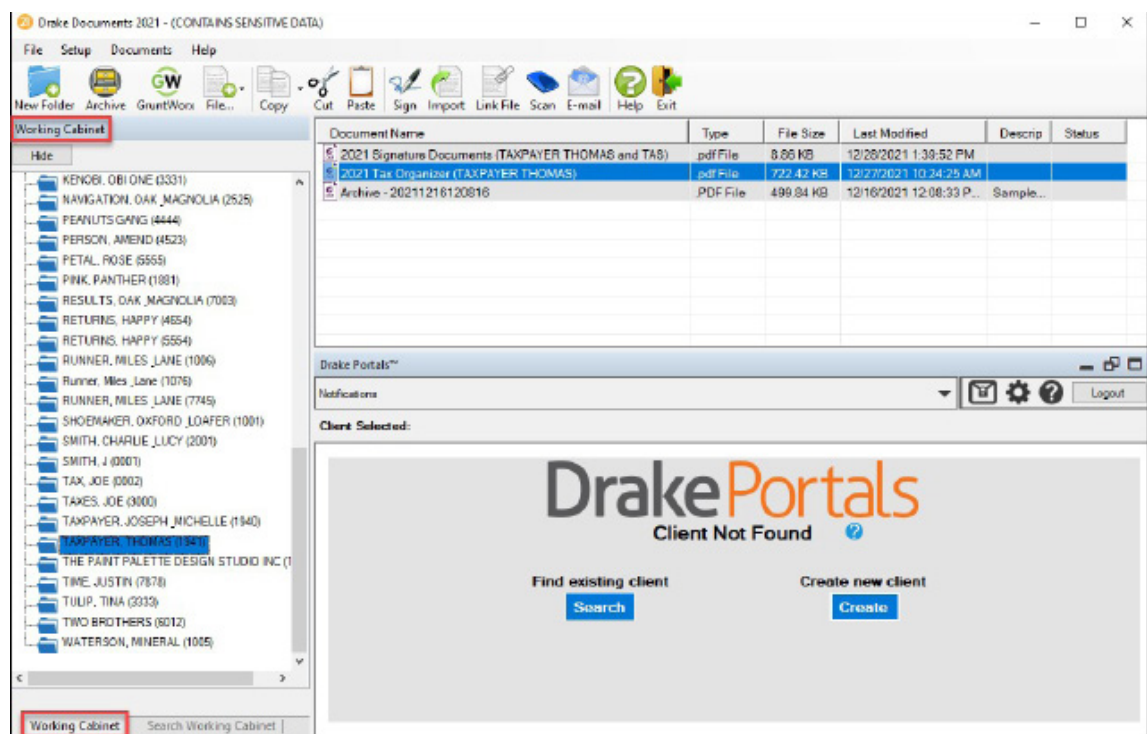


Customize the structure created by Drake Tax by adding or editing folders globally here. Highlight the year and right click to add a folder or click the Add button. Once implemented, this option cannot be reversed.

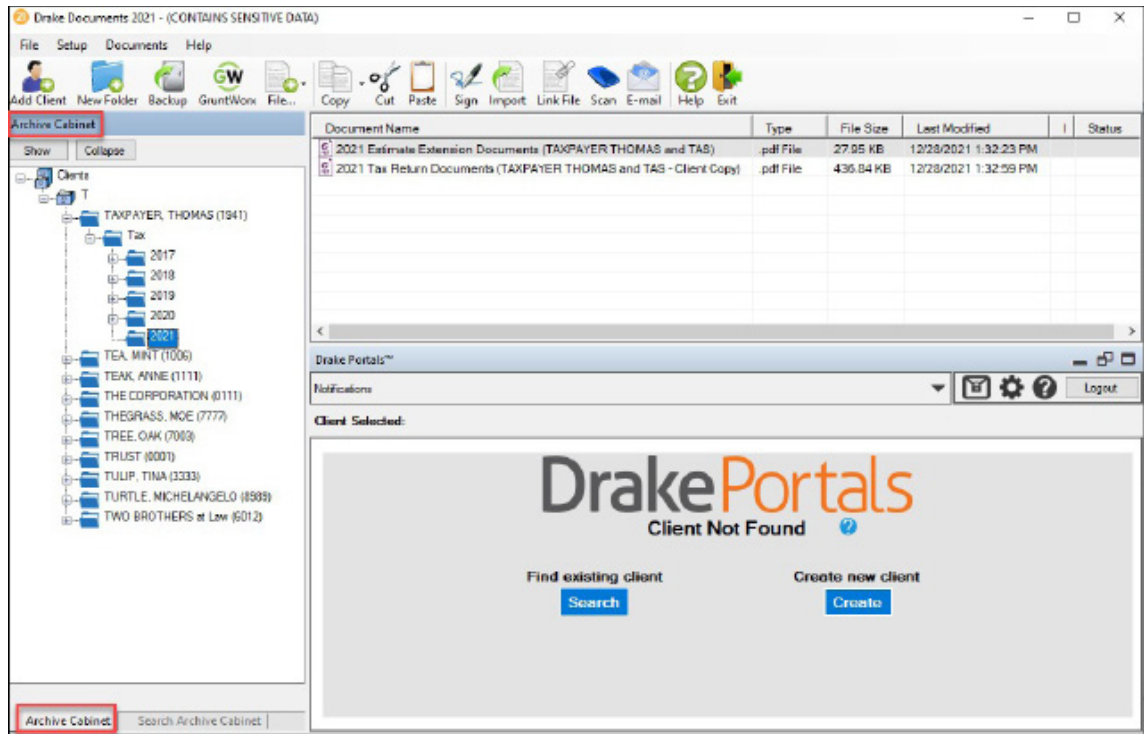
With either cabinet option, Drake Documents can be accessed from several locations:

- Desktop icon
- Documents icon in Drake Tax **Home** window
- Within a client return
- View/Print mode

Both the Working Cabinet and the Archive Cabinet display stored files alphabetically in a folder “tree.” The Working Cabinet displays folders by client or business name.



In the **Archive Cabinet**, client folders are stored in a series of drawers. Client folders stored within those drawers are listed alphabetically by the first letter of the last name (individual) or the first letter of the business or entity name. Expand the **Tax** folder and the years you have prepared taxes for that client in Drake Tax is displayed.



## Note

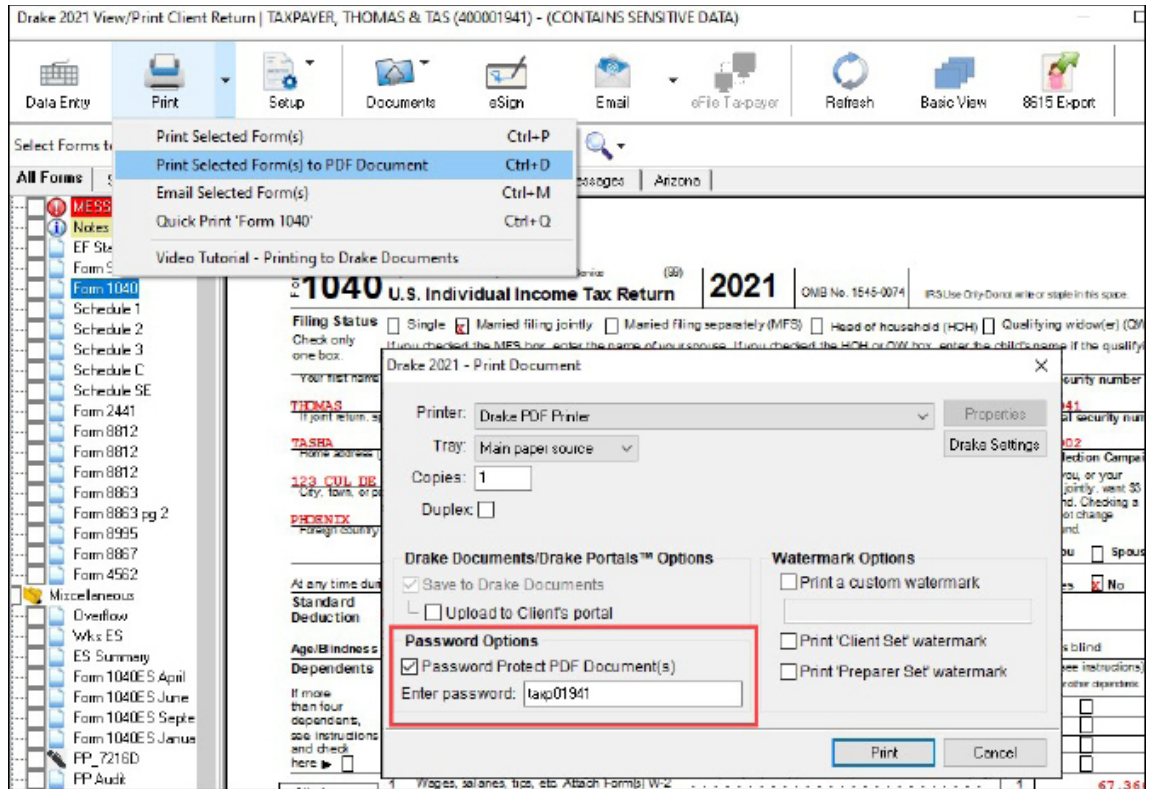
When utilizing the Archive Cabinet, it is important to include Drake Documents files in the backup menu setup options. See the Backup section included in the end of this handout for proper set up.

Drake Documents makes it simple to electronically store documents, including PDF copies of client tax returns.

1. Go to **View/Print** mode and select the forms of the return to save to PDF format.
2. From the toolbar, click the down arrow beside the **Print** button. Select **Print Selected Form(s) to PDF document**.
3. From the **Print Document** dialog box, click **Print**.

From the **Save As** window, click **Save**. The program automatically saves the document to the correct location in Drake Documents.





## Drake PDF Printer

### Drake PDF Printer Password Options

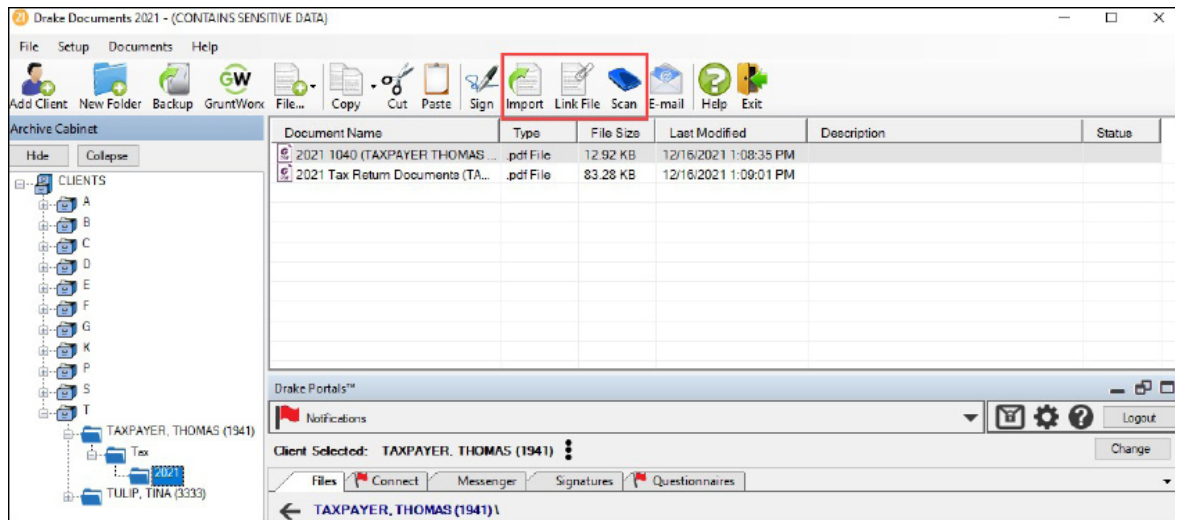
Choose to automatically password-protect any generated PDF documents. Passwords can be assigned to PDF documents that are sent through Drake Tax. The default password format is the first four characters of the client's name plus the last five digits of the client's ID. The **Default password** drop list includes other format options. These settings can be overridden during printing from the **Print Document** dialog box.

### Adding Files to Drake Documents

In addition to printing returns to PDF, there are other ways to store files quickly in Drake Documents.

- **Import** - Import a copy of a file from another program located elsewhere on your computer or network.
- **Link File** - Create a link in the document manager to an external document so that if the document is updated, the link remains and it is not necessary to update the file in Drake Documents.

- **Scan** - Scan items directly into the document manager using your flatbed or document feed scanner.



## Scanner Considerations

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Scan documents into Drake Documents using a flatbed or a document feed scanner. A flatbed scanner scans one page at a time, creating a separate PDF document for each page. An automatic document feeder (ADF) scans multiple pages and creates a single PDF document from several pages. Duplex scanners scan both sides of a document at once. The choice is dependent upon your workflow. In order for a scanner to be compatible with Drake Documents, it must be TWAIN-compliant. Always review scanner specifications before purchasing.

# Backup / Restore Tool

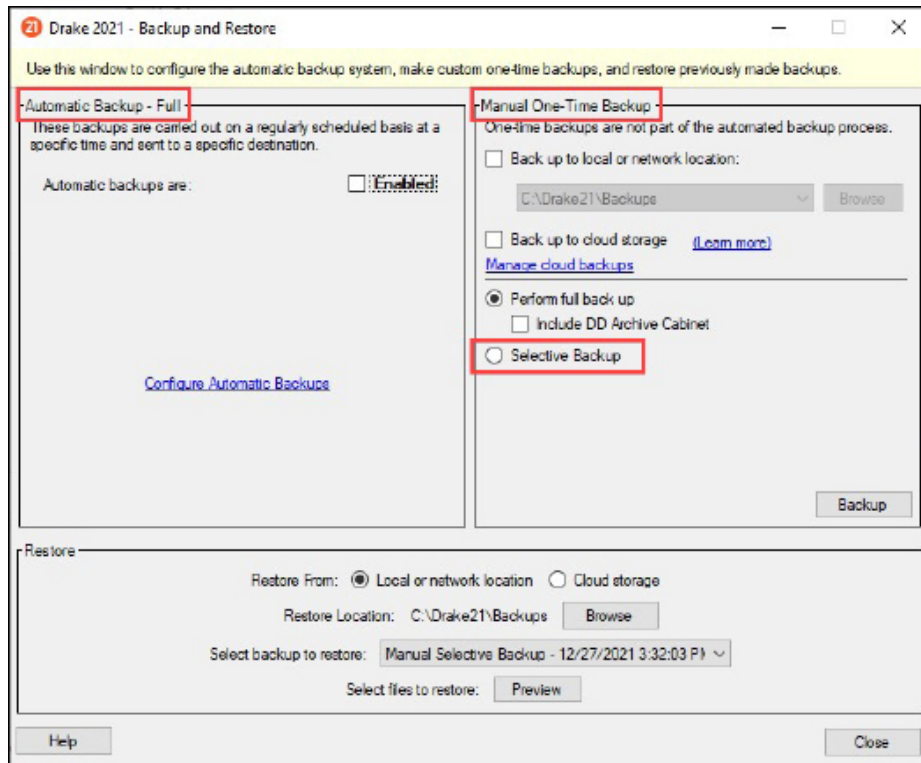
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Use the Backup and Restore tools to prevent loss of client data or to move client files to another machine. Files backed up to other locations can be used to restore lost data. If multiple machines are used for tax preparation in one office, files can be moved to other computers and uploaded to a single machine to create a master file.

## Manual Backup

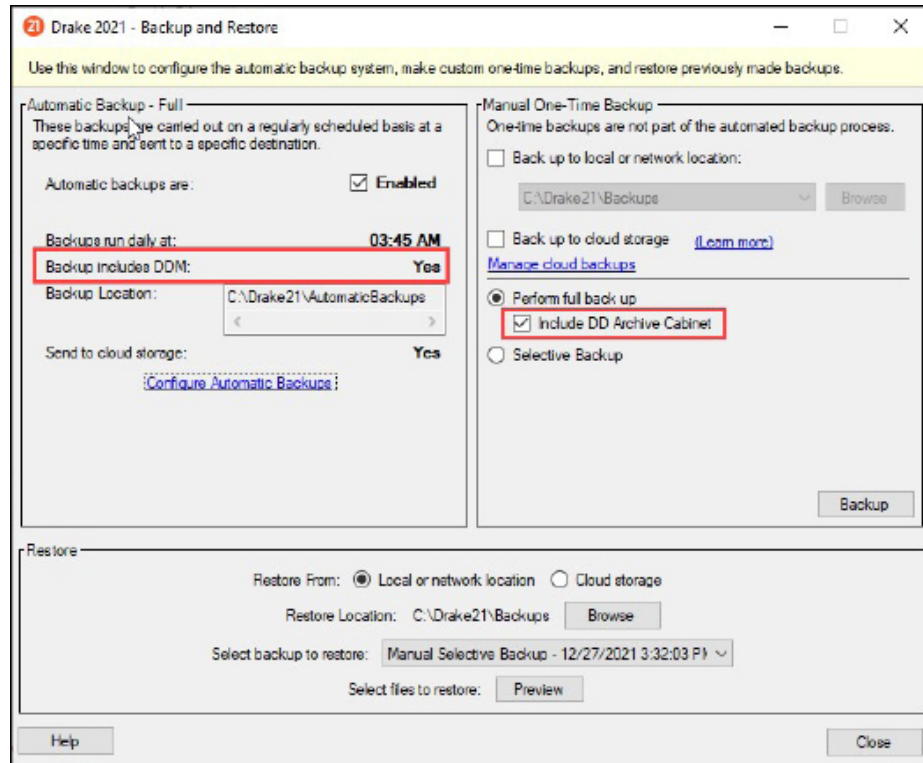
You can choose to perform a full manual backup of all your Drake Tax files, including the files in the Archive cabinet of Drake Documents. Choose to back up to a local device, a separate network location, or offsite through Drake Portals. To perform a Manual One-Time Backup:

1. From the **Home** window of Drake Tax, select **Tools > File Maintenance > Backup**.
2. Mark the **Back up to local or network location** box and, if necessary, click **Browse** to select a location (such as a server or a “flash” drive) to back your files up to. To back up your files offsite, click **Back up to cloud storage**.
3. Select **Perform full back up**.
4. (optional) Select to include your **Drake Documents Archive** cabinet. (The Working Cabinet is backed up automatically with Drake Tax).
5. Click **Backup**.



# Backup Settings for the Archive Cabinet Option

If you wish to use the automatic backup features in Drake Tax, from the **Home** window click **Tools > File Maintenance > Backup**. To include your Drake Documents files, select **Include DD Archive Cabinet**. Working Cabinet files are automatically backed up whenever Drake Tax is backed up.

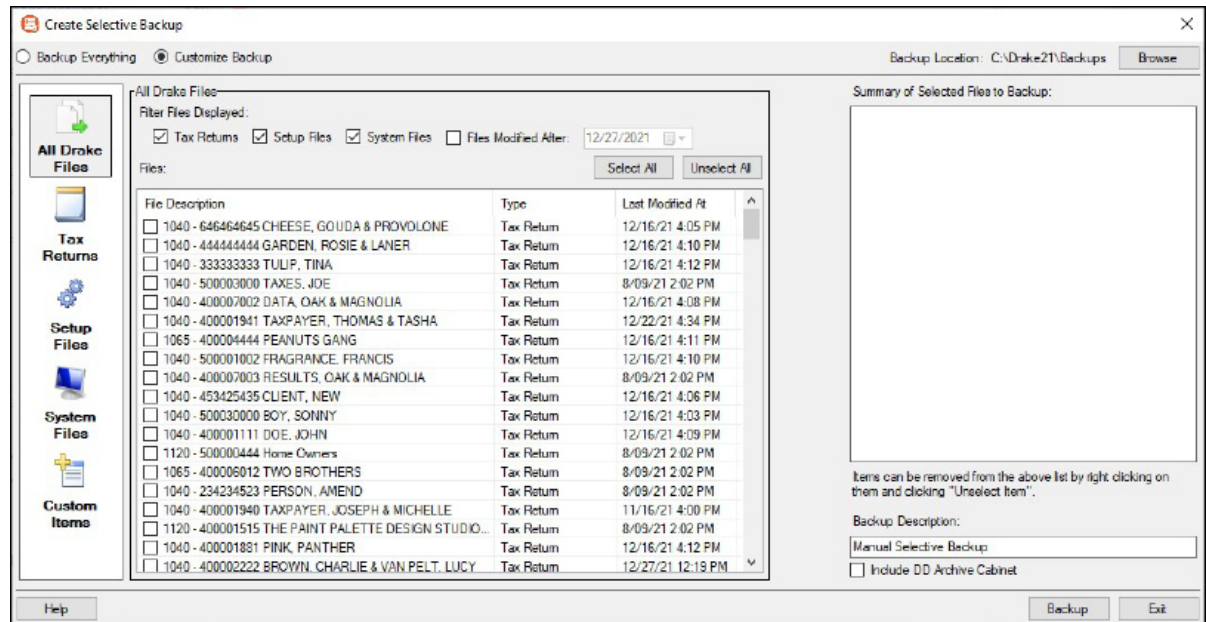


# Custom Backup

If you prefer to choose which files to include in the backup—including any non-Drake Tax files—mark the **Backup to local or network location** check box and mark **Selective Backup**. When you click **Backup**, the program opens the **Create Selective Backup** window.

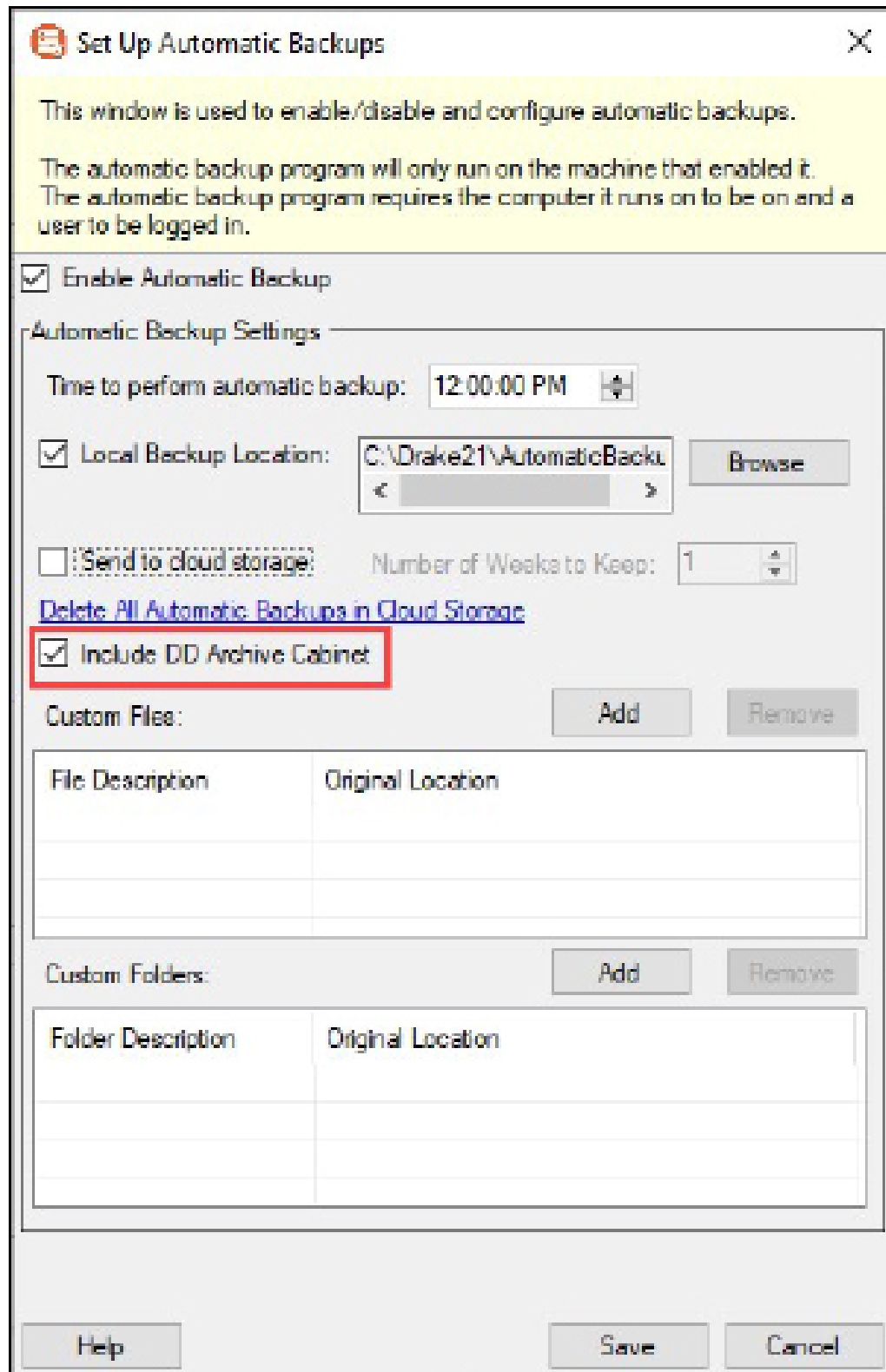
1. At the top left corner of the **Create Selective Backup** window, select **Customize Backup**.
2. At the top right corner of the dialog box, click **Browse** to choose a backup location.
3. Click the icons on the left side of the window and your files will be listed. (By default, all Drake Files are listed.) The icon you click determines the filter check boxes that appear at the top of the list. Note the check marks in the first column to indicate the selected files that will be backed up. The selected files will be listed in the **Summary** pane on the right side of the dialog box.
4. (optional) The **Custom Items** icon at the bottom left allows you to add non-Drake Tax files to your backup. In the **Custom Files and Folders** window, click **Add** on the **Custom Files to Include** line to include individual files, or click **Add** on the **Custom Folders to Include** line to add entire folders to the backup.
5. At the bottom right of the dialog box, enter a name for the backup in the **Backup Description** field.

To include Drake Documents files, mark the **Include DD Archive Cabinet** check box. You can back up your files to a local or network location and to Drake Portals at the same time by marking both check boxes in Step 1. Next, click **Backup**.



# Automatic Backup

Use the automated backup feature to have the program automatically back up your files at a specified time each day. Select the **Enabled** check box to turn on the automatic backup feature. Select **Configure Automatic Backups** to open the dialog box. Select a time and location for the backup. Your computer must be turned on at the time of the scheduled automatic backup.

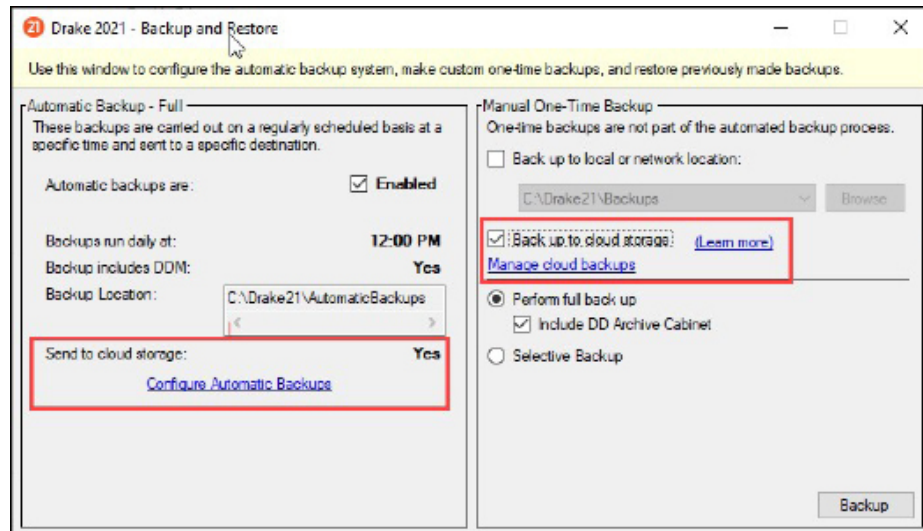




# Backup to Drake Portals

To backup Drake Tax files to Drake Portals, from the **Home** window menu bar in Drake Tax, go to **Tools > File Maintenance > Backup**.

In the **Manual One-Time Backup** section, mark the box **Back up to cloud storage** and



click **Backup**. When the Drake Portals Login window is opened, enter your Drake Portals account number, username, and password in the **Drake Portals Login** window. To set Drake Tax to automatically back up to Drake Portals, click **Configure Automatic Backups**. Select **Send to Drake Portals** and select for how long to store the backups in Drake Portals (stores up to 100 weeks).

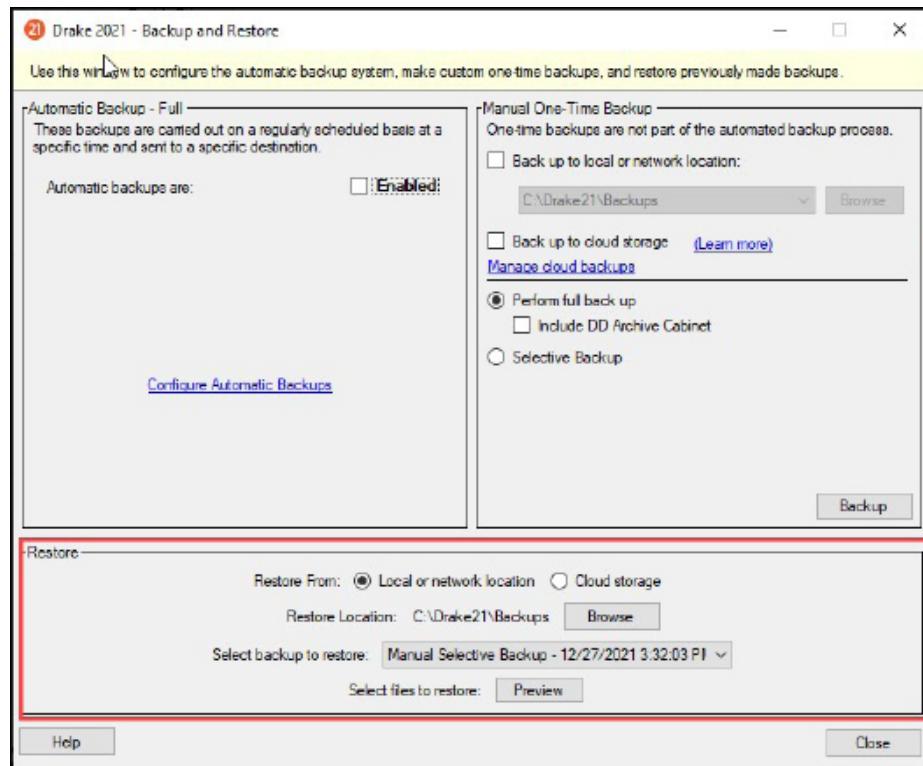
## Restoring Your Data

To restore your data from another location or drive, or from Drake Portals:

1. From the menu bar of the Home window of Drake Tax, go to **Tools > File Maintenance > Restore**, to open the **Backup and Restore** dialog box.
2. At the bottom of the **Backup and Restore** dialog box, select the location to restore your files from—a local or network location or Drake Portals.
3. If from a local or network location, click **Browse** and find the backup you want to restore, and select it.
4. Click **Preview**. This opens the **Restore Items Form Backup** window, where you can choose to **Restore Everything** or choose **Custom Restore**.
5. For a custom restore, click the buttons on the left side of the window to find the files on your computer or network. The button you click determines the filter check boxes that appear at the top of the list.



6. For a custom restore, select the items to be restored in the middle pane by placing a check mark in the box to the left side of the pane. (Note that selected files appear in the **Summary** pane to the right.) For non-Drake Tax files click **Custom Items** from the buttons on the left.
7. When you're satisfied with your selections, click **Restore**.



# Canon Promotion - Good Through February 28, 2022

**Canon**

Drake Software customers enjoy 25% off and free shipping on most  
Canon scanners with promo code **CANONDRAKE25**

<https://shop.usa.canon.com/shop/en/catalog/scanners-copiers-fax>





## Bio - Cathy James

Education Specialist

Drake Software

Cathy joined Drake Software in June 2021. Her background includes over 20 years of sales, practice management, and consulting experience in the dental market. In her role as Education Specialist, Cathy teaches the Drake Software Program at in person training classes and recorded webinars, video tutorials and webcasts.

# Drake Documents

**Course Fee:** Free to register and view webinar. Drake customers pay \$15.00 and non-Drake customers pay \$19.00 for CPE - Pay only if you want to print a CPE certificate after the webinar.

**Course Description:** In this webinar we will demonstrate how to use Drake Documents to organize, store, retrieve, and distribute documents in Drake Tax and streamline workflow to save time and money. At the end of this webinar, you will be able to:

- Understand the benefits of using DRake Documents to streamline workflow and digital storage.
- Recognize how Drake Documents is integrated with Drake Tax.
- Learn how to customize and use Drake Documents to electronically store files and create a paperless office.

**How to Register:** Sign in to DrakeETC.com and select **Webinars** from the menu on the left side of the web page. Select the webinar from the schedule displayed. Follow the prompts to register. Refer to the **FAQs** on the web page for detailed instructions and frequently asked questions.

## CPE Facts:

Affiliation	Format	CPE/Field of Study	Course ID #	Sponsor ID #
NASBA	Internet-Based	1 — Computer Software & Applications	N/A	103137
CTEC**	N/A	0- N/A	N/A	N/A
IRS	Online/Group	1 — Federal Tax Law	FQTGU-T-00458-22-O	FQTGU
TX State Board of Accountancy	Internet-Based	1 — Computer Software & Applications	100368	002921

\*Individuals with othe professional credentials should check with their state licensing board or accrediting organization to determine if this program meets their continuing education requirements.

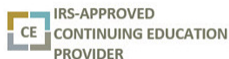
\*\*CTEC does not allow credit to be awarded for courses that cover tax software topics.

**Course Level:** Basic

**Last Revision:** Winter 2022

**Prerequisites:** There are no required prerequisites other than a general knowledge of Drake Tax.

**Course Policies:** Drake Software will grant a full refund if a refund request is received within at least 72 hours prior to the start of the webcast. Registrants who are “no-shows” for the live webcast will not qualify for a refund. Refund requests will *not* be granted by phone and must be sent to [Education@DrakeSoftware.com](mailto:Education@DrakeSoftware.com)



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Drake Software has been approved by the California Tax Education Council to offer the 2021 Update School, CTEC #3038-CE-0255, which provides 4 hours of federal tax update credit and 0 hours of state credit, and 3038-CE-0257, which provides 1 hours of federal tax credit and 0 hours towards the annual continuing education requirement imposed by the State of California. A listing of additional requirements to register as a tax preparer may be obtained by contacting CTEC at P.O. Box 2890, Sacramento, CA 95812-2890, toll-free by phone at (877) 850-2832, or on the Internet at [www.ctec.org](http://www.ctec.org)