

# Documents – A user guide

There are six main ways to distribute and store documents with CompanyControls:

1. **Companywide documents** - these are available to be read by all staff.
2. **Employee documents** - These are split into regular documents and their sensitive, private documents such as contracts of employment and letters of engagement.
3. **Record Supporting documents** - documents that offer guidance, information or confirmation for other modules in CompanyControls such as training certificates, appraisal guidance notes and Injury witness statements
4. **Module Supporting documents** - Documents that are used in the administration of other modules such as appraisal guidance notes linked to specific appraisals forms
5. **Template documents** - Template letters and forms
6. **System Documents** - Setup forms

## Companywide Documents

**Admin > Files > Company File Headers**

**IMPORTANT:** Only Client Admins can access this area

This area will list any types of files already added and let you add new ones. The file types that can be added are the following but others can be added upon request:

- Certificates
- Company Handbook
- Forms
- Guidance
- HR - General
- Insurance
- Manuals
- Memos
- Policy
- Publications
- Publicity Materials
- Reports

For instance if you want to add your Company Handbook so that it is available to read by your staff you would click 'Add New' and complete the form describing the new document.

e.g.

**Add File Header**

File Class:  (\*)

File Ref:  (Optional)

File Title:  (\*)

Log Downloads:

Disp Ord:  (\*)

Click Add and a new Area will be created to hold this document. The next page will show you the area that has been added to hold this document with the list of documents already added underneath (this is empty at first as no files have yet been uploaded).

e.g.

**Edit File Header**

File Class: Company Handbook

File Ref:

File Title:  (\*)

Last Ver Updated : First Added : Last Added :

Num Live Vers : Vers Are Sub Docs : No

Can Download : Yes Can Upload : Yes

Header Access By:



Version Access By: Anyone

Log Downloads:

Disp Ord:

Added : 10/09/14 13:16 LJP

Updated : 10/09/14 13:15 LJP

Current Ver   [Upload New File](#)

**File Versions/Sub Docs (0)**

<u>Version</u>	<u>Access</u>	<u>Is</u>	<u>Disp</u>
<u>/Sub Doc</u>	<u>By</u>	<u>File Size</u>	<u>Latest Added By</u>
			<u>Ord Updated By</u>
No records			

You should now upload the first version of this document by clicking the 'Upload New File' link. This will open a new form to add the new document. Simply choose the new file you want to add and click Add.

e.g.

File	
File Class	Company Handbook
File Ref	2515/XX01
File Title	Our Company Handbook

**Add File Version/Sub Doc**

File  Company Handbook.txt

Limitations Max 10,485,760B File Size Extension Types : \*.xls\*;\*.doc\*;\*.pdf\*;\*.txt\*;\*.tif\*;\*.ppt\*;\*.jpg

Ver/Sub Doc Ref  (Optional)

Latest

Disp Ord

Once the document is added it will be listed.

**Edit File Header**

File Class Company Handbook

File Ref

File Title  (\*)

Last Ver Updated : 10/09/14 15:31 First Added : 10/09/14 15:31 Last Added : 10/09/14 15:31

Num Live Vers : 1 Vers Are Sub Docs : No

Can Download : Yes Can Upload : Yes

Header Access By



Version Access By Anyone



Log Downloads

Disp Ord

Added : 10/09/14 13:16 LJP

















Updated : 10/09/14 13:15 LJP

Current Ver   [Upload New File](#)

File Versions/Sub Docs (1)										
Version /Sub Doc	Access By	File	Size	Is Latest	Added	By	Disp Ord	Updated	By	
  <a href="#">Sep 10 2014 3:30PM</a>	Anyone	Company Handbook.txt	58B	Yes	10/09/14 15:31	LJP	1	10/09/14 15:30	LJP	

Subsequent revisions, new versions, updates or related documents can be uploaded in the same way and they will become the latest version of that document. CompanyControls offers a quick save and view option for the current version but previous versions can be seen if required.

For an employee, these documents are available by going to My Details > Files > Company

General Company Documents (8)							
File Class	File Ref	File Title	Last Version Update	Size Mb	Filename	Num Live Vers	Version Access By
 	Company Handbook	2515/XX01	Our Company Handbook	10/09/14 15:31	0.000	Company Handbook.txt	1 D Anyone
 	HR - Handbook		Lees handbook	14/09/13 10:28	0.393	COMMUNITY_2013_IKEA_Belfast.pdf	1 D Anyone
 	HR - Handbook	test	test	03/07/14 18:35	0.135	license.txt	1 D Anyone
 	Performance Review - Support	PR01	PR GENERAL SUPPORT DOC	01/08/14 13:09	0.012	THIS IS A DUMMY TEMPLATE.docx	1 D Anyone
 	D/G - Guides	HRD	Disciplinary Guide	11/04/13 21:00	0.003	disciplinary grievance notes (2).txt	1 D Anyone
 	D/G - Guides	HRG	Grievance Guide	11/04/13 21:00	0.049	Grievance_Proc.pdf	1 D Anyone
 	D/G - Flowchart	DGPF0001	DG Process Flow for DGPF0001	09/07/14 09:01	0.032	DGPF0001_20140709_090105.pdf	22 D Anyone
 	D/G - Flowchart	DGPF0002	DG Process Flow for DGPF0002	30/07/14 15:30	0.032	DGPF0002_20140730_153002.pdf	4 D Anyone

The latest file can be saved or viewed with the icons on the left.

All versions of this file can be listed and view/saved by clicking the 'Num live Vers' (Number of Live Versions) column towards the right. The subsequent page will list all versions or previous editions and show when these versions were viewed by the employee.

## Employee Documents - regular documents

Documents can be uploaded to support the employee records already held in the following pages:

- Medical
- Salary
- Work Documents

These pages are found at People > Employee name > Person (dropdown) > Medical | Salary | Work Documents where the list (below) is at the bottom of each page.

Support Documents (0) - Upload						
File Title	Ver/Sub	Doc Ref	Size Mb	Filename	Latest	Disp Ord Added
No records						

To upload a new document click Upload. Each area has a predefined list of document types that you can add the document to. Other document types can be added of your choice (see below for details).

The document types (File) for Work Documents are as follows:

**Add File upload**

File Class	Work Documents	
File	<div style="border: 1px solid gray; padding: 2px;">             Select Value ▼ (*)           </div>	
Ver/Sub Doc Ref	<div style="border: 1px solid gray; padding: 2px;">             Select Value           </div>	<input type="text"/> Latest: <input checked="" type="checkbox"/>
Limitations	Passport 1 Passport 2 Driving Licence	ion Types: *.xls*;*.doc*;*.pdf;*.txt;*.tif;*.ppt*;*.jpg
Filename	MOT Insurance Work Permit / Visa Birth Certificate National Identity	<input type="text"/> osen (*) orking/template document (.doc/.xls etc), format to upload.
To minimise file st we recommend th		