

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.

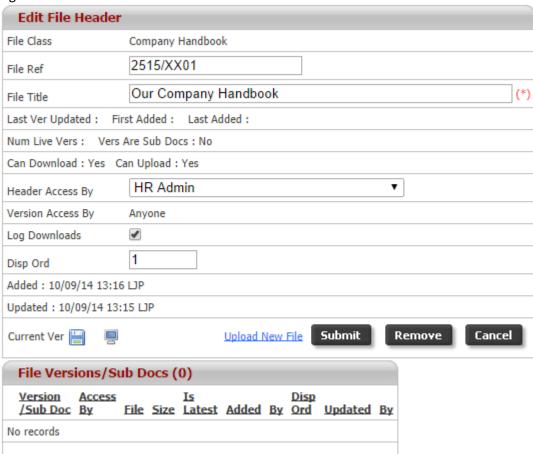
├── CompanyControls

e.g.

Add File Header				
File Class	Company Handbook	▼ (*)		
File Ref	2515/XX01	(Optional)		
File Title	Our Company Handbook			(*)
Log Downloads	✓			
Disp Ord	1 (*)			
			Add	Cancel

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.

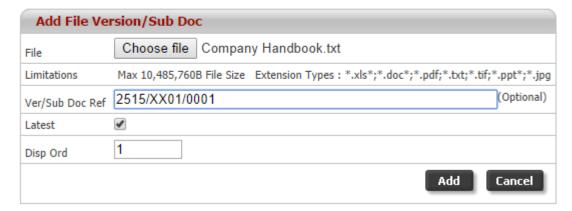


You should now upload the first version of this document by clicking the 'Upload New File' link. This will open a new form to add the new document. Simply choose the new file you want to add and click Add.

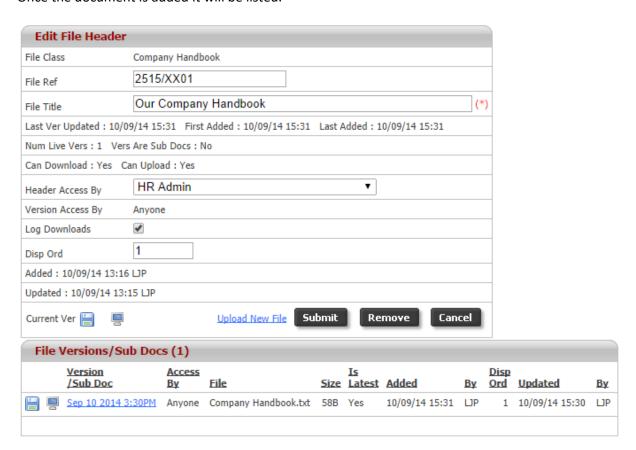
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e.g.





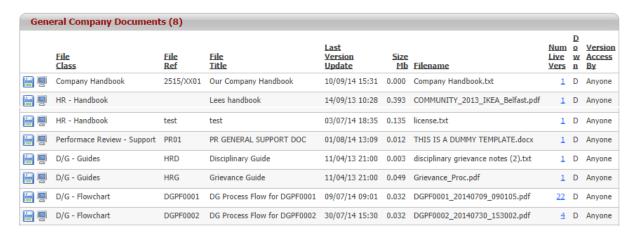
Once the document is added it will be listed.



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



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.



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:

