

# Document Management

## TEMPLACMS

Version: v6.1.0



# COMMERCIAL STATEMENT

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# INTRODUCTION

These training session notes have been designed to provide background information and useful hands on experience of using the document management module within CMS.

These notes are designed to complement the training and assist you at a later stage when away from the training environment.

# DOCUMENT MANAGEMENT

## System Control

From *System Control > System Setup > Document Store*, a path can be defined to a central network location where all documents can be stored:

The screenshot shows the 'System Control - System Setup' window with the 'Document Store' configuration page. The window has a title bar and a menu bar with 'General', 'Business analysis levels', 'Passwords', 'Frequency colours', 'Email preferences', 'Data protection', 'Housekeeping', and 'Licence'. The 'General' tab is active. The 'Document Store' section is expanded, showing the following fields:

- Company name:
- Company number:
- Formatting: Name formatting:
- Documents: Document store structure:
- Paths: Company logos:  Gateway:  Document store:  Newsletters:  Crystal reports:
- Polling frequency: Gateway:  (seconds) Batch:  (seconds)
- Auto number clients: Maximum characters:  Minimum digits:
- Auto number sites: Code based on client, followed by:  Minimum digits:
- Auto number suppliers: Maximum characters:  Minimum digits:
- Normal working days/times: Monday: 09:00 - 17:00 Tuesday: 09:00 - 17:00 Wednesday: 09:00 - 17:00 Thursday: 09:00 - 17:00 Friday: 09:00 - 17:00 Saturday: (not set) - (not set) Sunday: (not set) - (not set)
- Language selections: Document language set:  Windows language set:

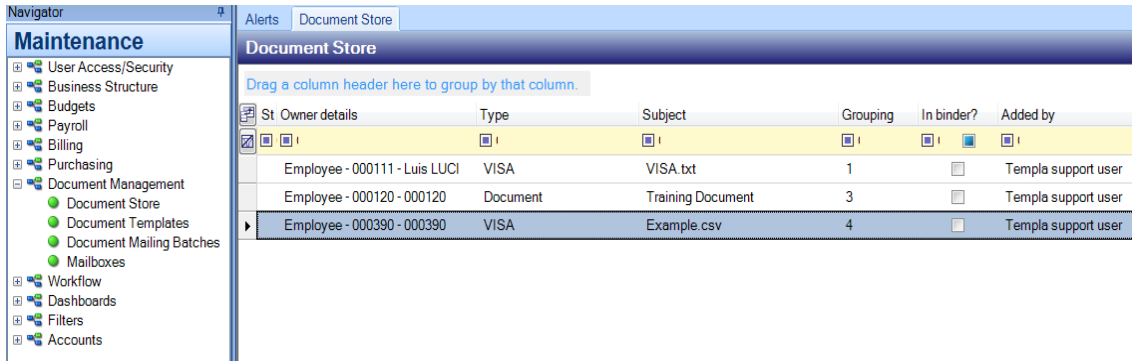
At the bottom left, there are two checkboxes:  Block ALL posting options? and  Allow mobile V2?

All users should have sufficient permission to create & modify folders and files in the location as defined above.

As documents are added to the store, TemplaCMS copies the original document to a path within the location as defined on *System Control*.

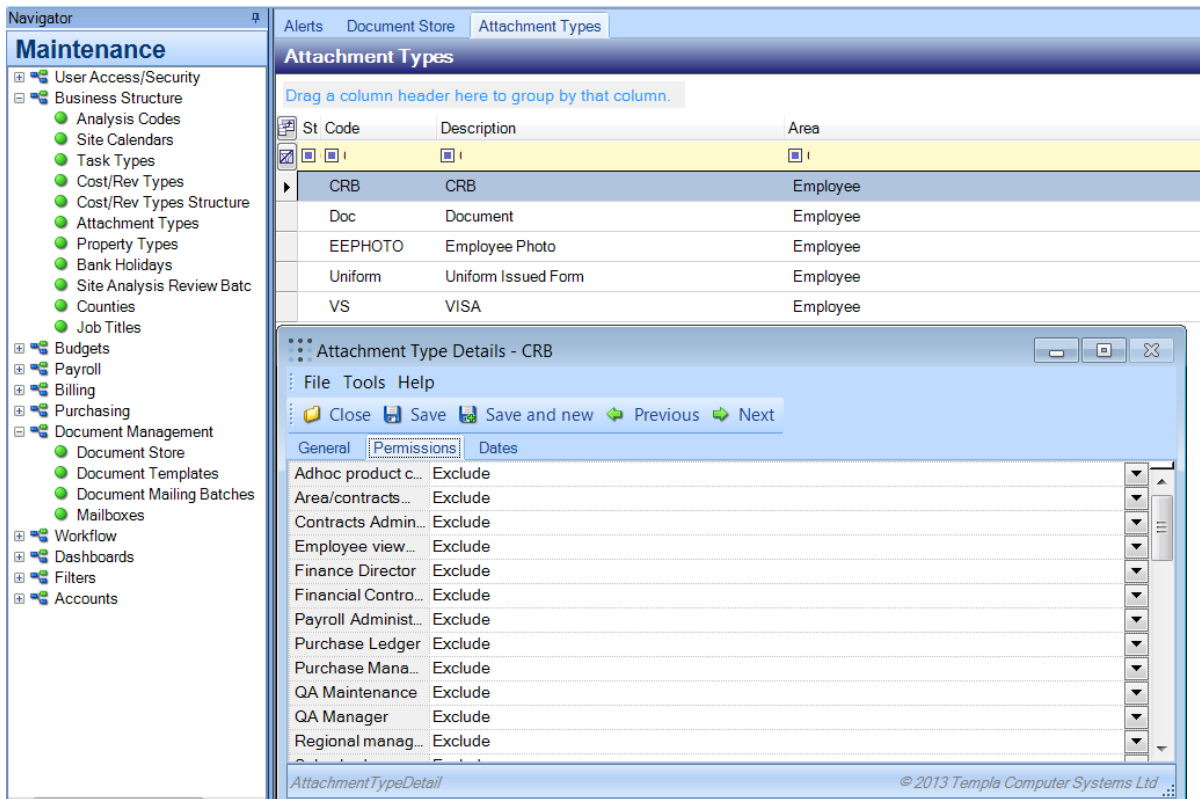
# Document Store

The *Document Store* can be accessed from the *Maintenance > Document Management > Document Store* menu:

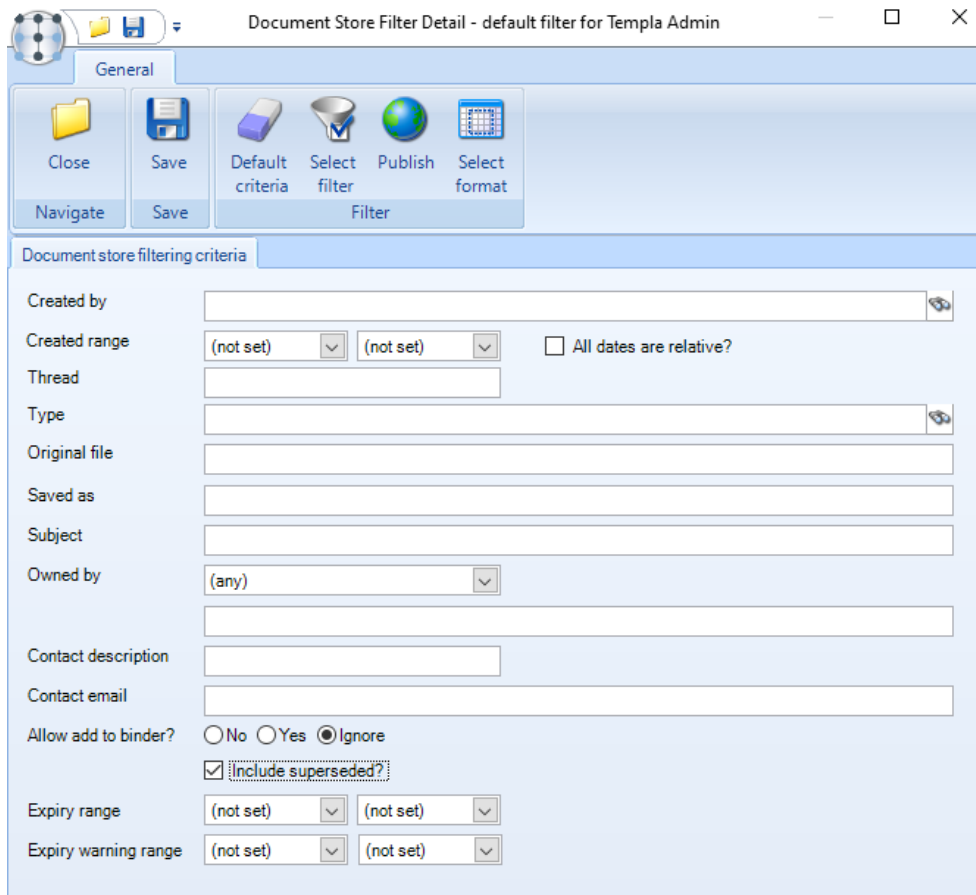


The document store gives an overview of all the documents in the store to which the user is authorised (based on the 'attachment type' permissions).

The *Attachment types* and relevant permissions for each can be managed from the *Maintenance > Business Structure > Attachment types* menu (please see the TemplaCMS Maintenance manual for more information on setting up and managing *Attachment types*):

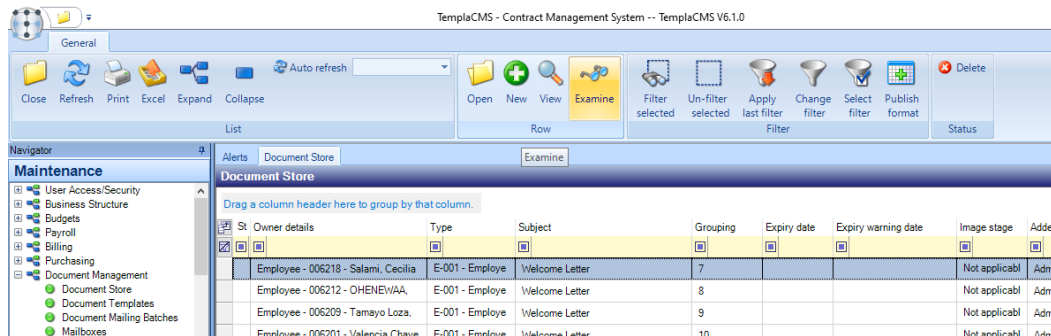


The document store can be filtered or searched based on the following details:

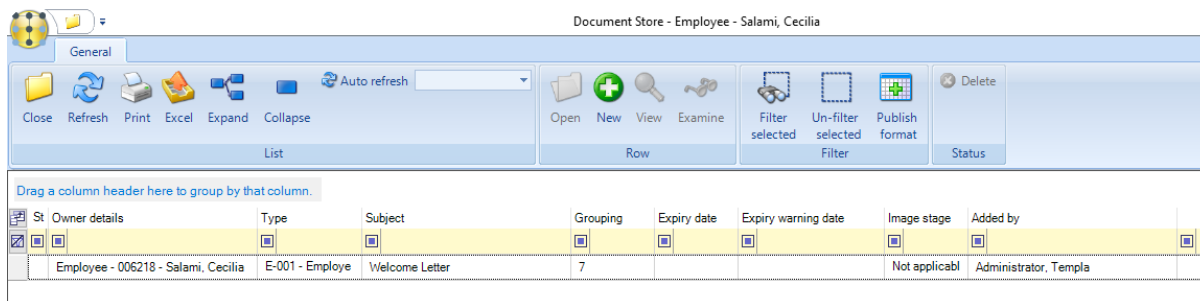
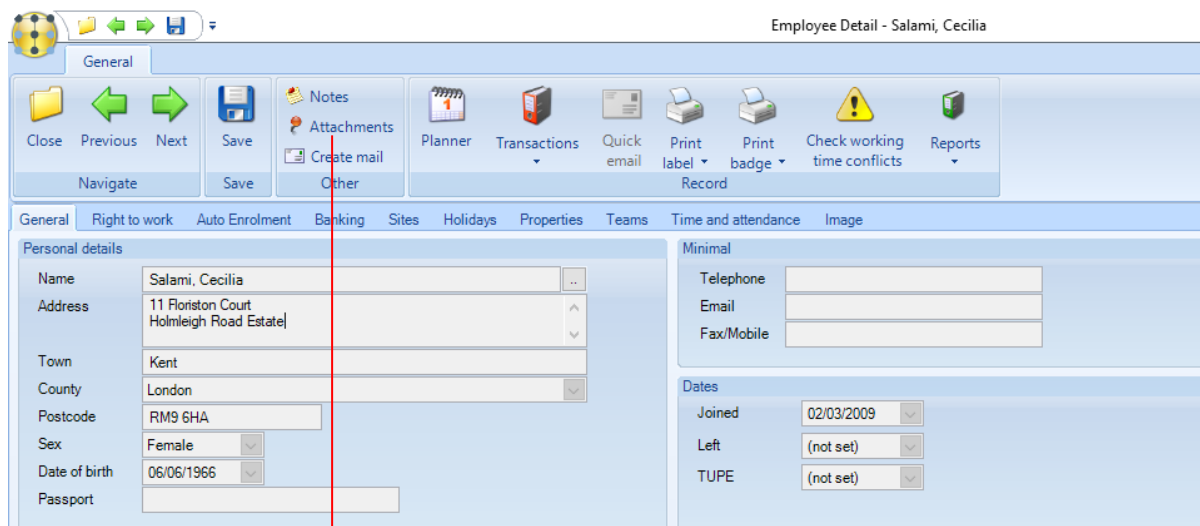


The document store filter has an option of *Include superseded?* When flagged, any superseded document store files will be included subject to any other entered filter options.

The centrally held document can also be examined:



From any area in TemplaCMS where attachments can be defined, the same filter, search and examine functionality exists. For example, employee attachments:



Attachments can be set up in the following areas of TemplaCMS:

- Cashbook entries
- Clients
- Contacts
- Contracts
- Employees
- Equipment items
- Goods receipts
- Purchase invoices
- QA forms
- Service requests
- Sites
- Suppliers
- Stores orders
- Workbills

## Adding to the document store

When adding to the document store the following details can be specified:

The screenshot shows a dialog box titled "Document Store File - (new)". It has a "General" tab and a "Details" tab. The "General" tab contains the following fields: "Grouping" (text input), "Type" (text input with a dropdown arrow), "Original file" (text input with a browse button), and "Subject" (text input). The "Details" tab contains the following fields: "Owned by" (dropdown menu with "not assigned" selected), "Saved as" (text input), "Source" (text input with "External" selected), "In binder?" (checkbox), and "Document batch address to contact" (text input). The dialog also has a toolbar with "Close", "Save", "Save and new", and "Examine" buttons, and a "Record" button.

**Grouping** - each item can be assigned a grouping reference to allow related items to be grouped on the document store grid. If not specified, a unique number will be assigned instead.

**Type** - Attachment types are defined on the *Maintenance > Business structure* menu. Users will only be able to add attachment types that they have permission to.

**Original file** - this is the file location of the item to be attached. Use the 'browse' button to locate the file.

**Subject** - enter a subject for the attachment for example 'Dunning letter'.

**Owned by** - this specifies the area of CMS the document relates to and should default in from the *Attachment type*. On adding items, the *Owned by* details don't need to be specified but once set it cannot be changed.

**Saved as** - when an item is saved in the document store, the source file is automatically copied to a sub-folder within the document store path based on the ownership details.

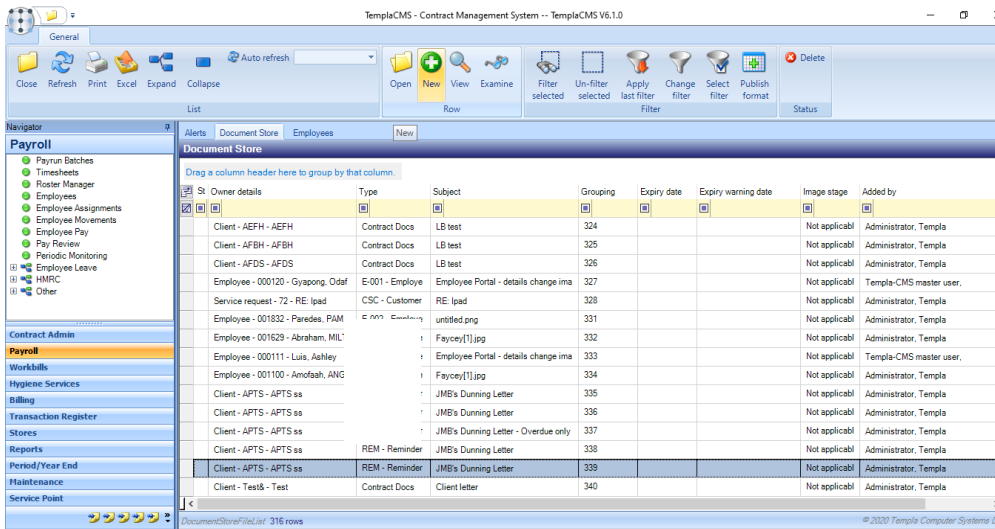
**Source** - where a document has been manually attached by a user the *Source* will show as *External*. When an attached document has been generated by the system as part of a mail merge batch the *Source* will show as *Internal*.

**Document batch address to contact** - when creating a document mailing batch for a client document, the contact selection tab allows the user to select the default client email address, rather than specific contacts. Note that the email address used will be stamped on the email that is stored on the client's attachments list when the mailing batch is processed.



## ADDING MANUALLY

Users can manually add items to the document store by pressing the *New* button on the toolbar and then browsing to locate the relevant file:



When accessed from another area of TemplaCMS (for example attachments on a specific employee), the *Owned by* details will be defaulted and cannot be changed.

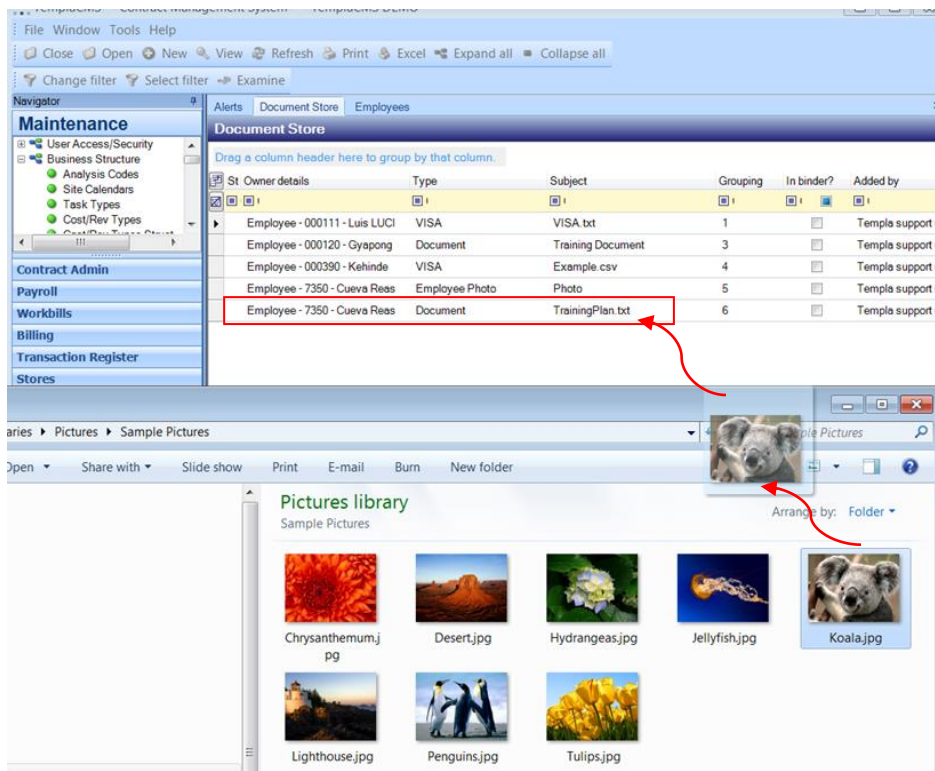
## ADDING VIA 'DRAG AND DROP'

Existing files of any type can be dragged from the user pc and then dropped in a variety of places to add them to the *Document Store*.

For each file dropped, the user will be prompted to complete the necessary details as per point 2.3 above.

### *Drop on a document store list*

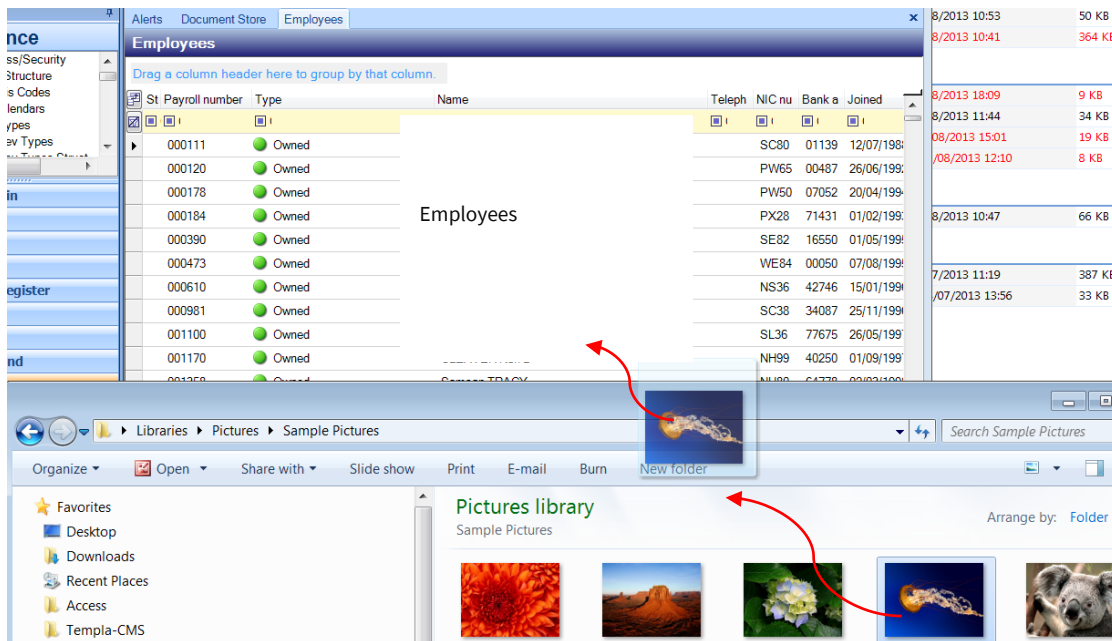
When a file is dragged and dropped on the document store list, the record onto which the file is dropped is detected. This is then used to determine the owner and grouping of the new item based on the record it was dropped on.



Drop on a list that supports attachments:

As listed above a number of areas in TemplaCMS support *Attachments*. Dragging and dropping a file on to a row on any of these lists (for example client list, contract list, employee list etc) will default in some details and prompt the user to complete the rest.

For example, drag a picture of an employee and drop on the relevant employee on the employee list:



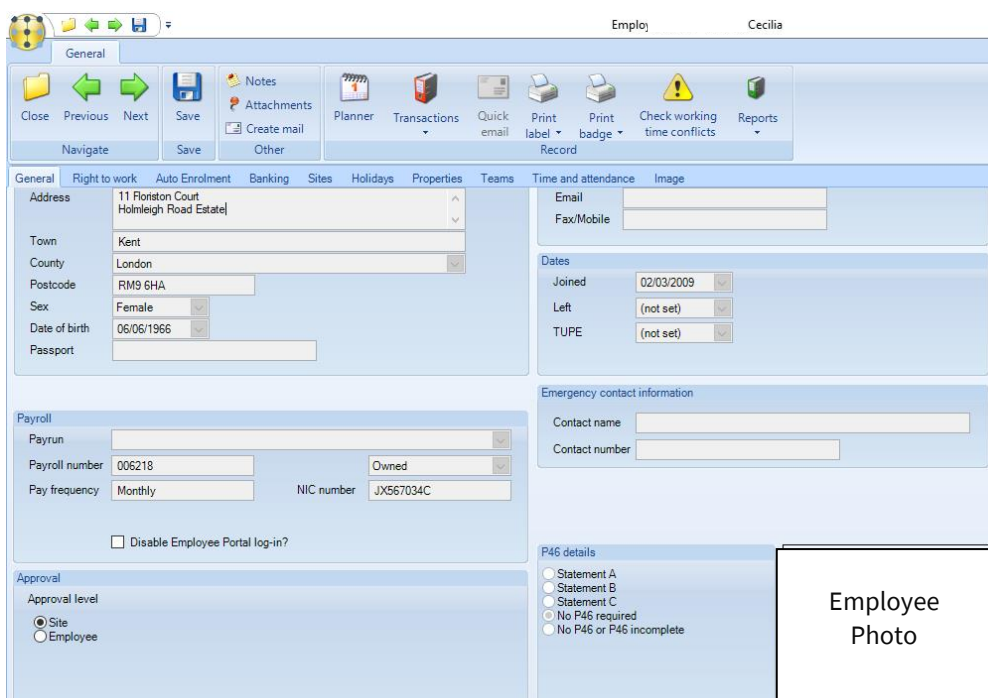
Drop on an (open) item supporting attachments:

A file can also be dropped directly on to an open record as opposed to a list, so in the example above instead of dropping the item on the employee in the list, the employee record can be opened first (double click on the employee).

## Employee images

An employee photograph can optionally be stored for each employee in TemplaCMS, and this can be seen on the exiting *Images* tab of the employee details window.

For quick access, a new thumbnail image is available on the *General* tab of the employee details:



## EMPLOYEE FILTERING ON PHOTOS

Within TemplaCMS, a single employee level attachment type can be nominated as the 'use for record display' (i.e. it contains the employee photo).

The existence or lack of an attachment of this type has been included as a column named 'Has photo?' in both the main employee and the employee assignments list.

Furthermore, the filters for both of these lists allow filtering on photos, as below:

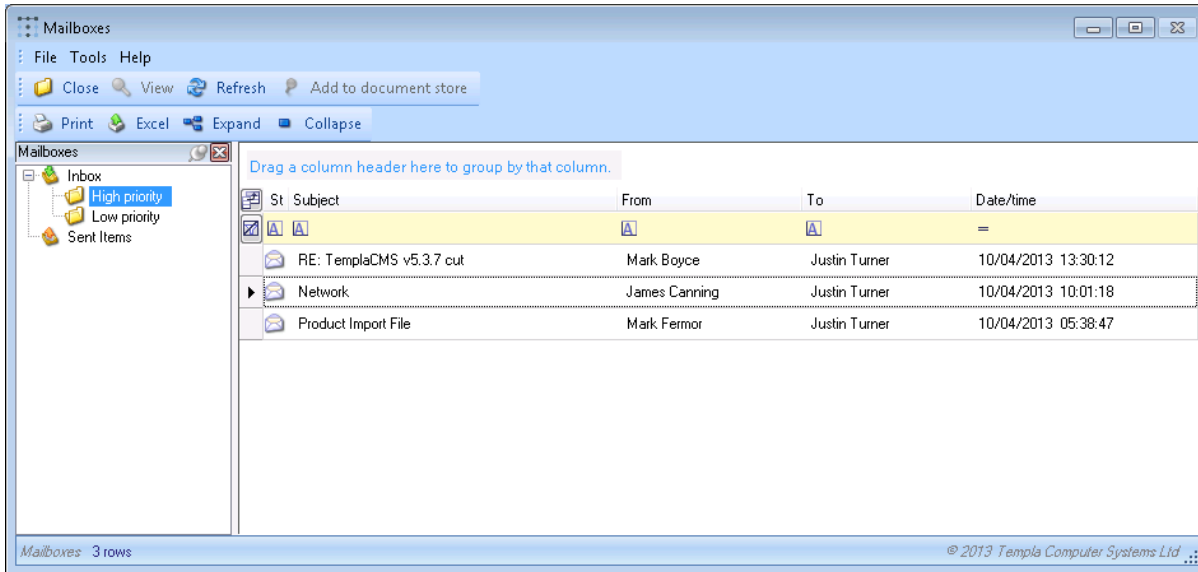
The screenshot shows the 'Employee Filter Detail' window with a 'General' tab selected. The interface includes a toolbar with icons for Close, Save, Default criteria, Select filter, Publish, and Select format. Below the toolbar, there are two tabs: 'Employee filtering criteria' and 'Employee properties filtering criteria'. The 'Employee properties filtering criteria' tab is active, displaying various filters for employee data. The 'Has photo?' filter is highlighted with a red box, showing radio button options for No, Yes, and Ignore, with 'Ignore' selected. Other filters include Employee code (006218), Employee name, Address, Postcode, Telephone, Fax or mobile, Email address, NIC number, Joined between, Left between, Employee status, Approval status, Site, Pay scale, Pay rate between (£0.00 to £0.00), Bank account no., Date of birth, and Account type.

Filter Name	Value / Options
Employee code	006218
Employee name	
Address	
Postcode	
Telephone	
Fax or mobile	
Email address	
NIC number	
Has photo?	<input type="radio"/> No <input type="radio"/> Yes <input checked="" type="radio"/> Ignore
Joined between	(not set) (not set)
Left between	(not set) (not set)
Employee status	(all)
Approval status	(all)
Site	
Pay scale	
Pay rate between	£0.00 £0.00
Bank account no.	
Date of birth	(not set) (not set)
Account type	(all)

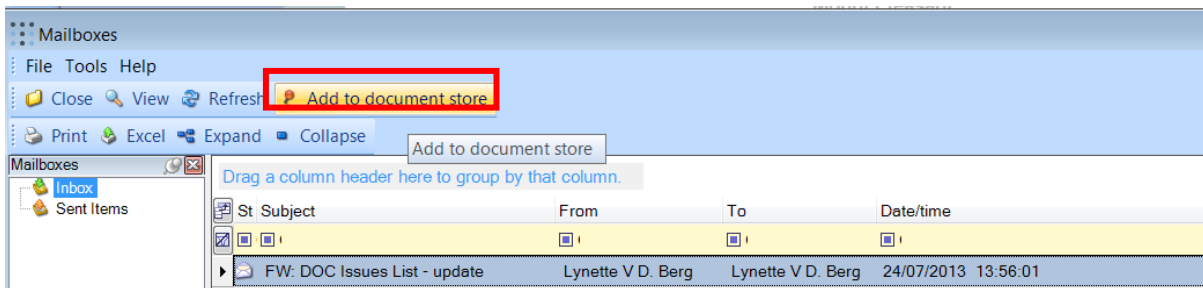
# MAILBOXES

The *Mailboxes* option available from the *Maintenance > Document Management menu* provides a view of a users Microsoft Outlook 'inbox' and 'sent items', along with all of their subfolders.

As the user clicks on 'Inbox' or 'Sent Items', the contents are retrieved and displayed in the searchable grid on the right-hand side:



From the previous screen, the user can view the emails and select them to add to the document store:



Emails can also be dragged and dropped from the above screen into the document store or directly from Outlook.

**Please note that the document store mailbox functionality only integrates with e-mails from MS/Outlook.**

Further to the above, as there are both 32bit and 64 bit versions of MS/Outlook and the former can be run on either a 32bit or 64bit version of Windows it is imperative that the **correct version of the TemplaCMS executable (client) is used** if access to mailboxes is required.

Please refer to the grid below to ensure that you are using the correct executable:

Windows version	Outlook version	TemplaCMS executable
64bit	32bit	TemplaCMS32.exe
64bit	64bit	TemplaCMS.exe
32bit	32bit	either

In addition to the above the corresponding version of the redemption.dll (32bit or 64bit) should be installed on the user pc.

## Document store filter superseded

The 'Include superseded?' option on the Document Store filter will, when flagged, include any superseded document store files subject to any other entered filter options.

## MAIL MERGE PROCESSING

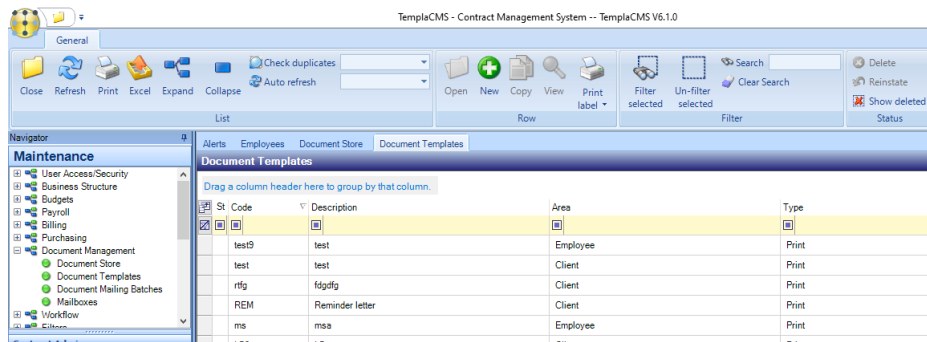
Mail merges can be performed from within Templa CMS, allowing dynamic integration with MS Word and Outlook through the use of document templates within CMS.

## Document templates

### CREATE A DOCUMENT TEMPLATE

New document templates can be added or existing templates amended. When a template is created and used in a mail merge, the resulting document will be added to the document store.

A new document template can be created by clicking on *New* from the *Maintenance > Document Management > Document templates* menu:



Complete the following details:

The screenshot shows the 'Document Template - (new)' form with the following fields and options:

- Code:** [Text input field]
- Description:** [Text input field]
- Subject:** [Text input field]
- Attachment type:** [Dropdown menu]
- Document:** [Text input field]
- Print/Email/Both:** Radio buttons with 'Print' selected.
- Use as default?:**
- Comments:** [Large text area]

**Code** – give the template a code if left blank the system will automatically generate a code on saving the template.

**Description** – enter a description for the template.

**Subject** – the *Subject* is important if the template is going to be e-mailed as the text entered here will appear in the ‘subject’ of the e-mail.

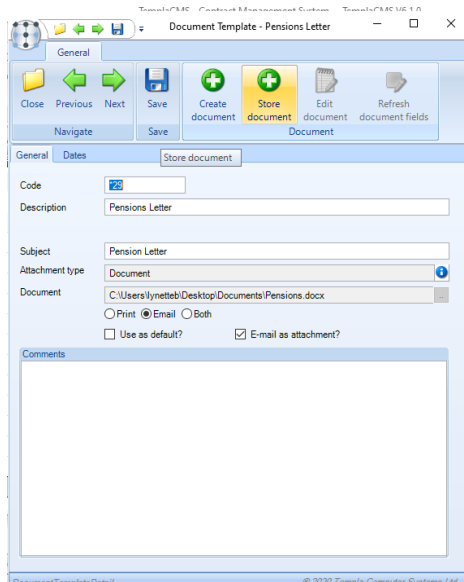
**Attachment type** – select an existing *Attachment type* or create a new one. The resulting merged document will be saved in the document store with the attachment type as specified on the document template.

**Document** – from the *Document* option, browse to an existing document or create a new document via clicking on the ‘Create document’ button at the top of the screen.

**Print/Email/Both/Use as default** – the *Print* and *Email* options are used to specify whether the template is for print OR email and the *Use as default* option to set the template as the default for the attachment type area.

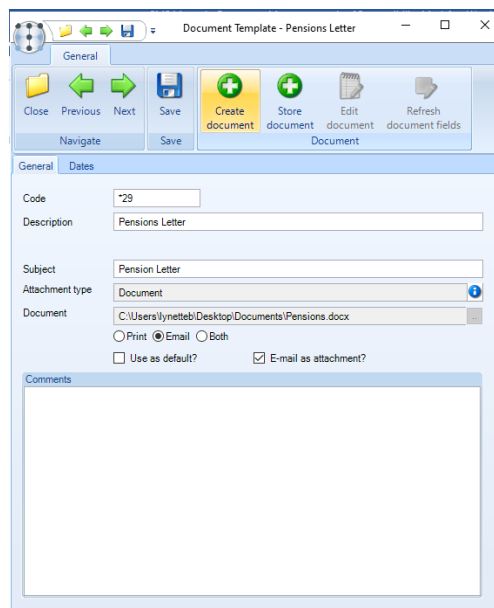
With the *Email* option selected the user gets access to the *Email as attachment?* option. When a document batch is assigned a document template defined as *Email as attachment?* will result in an e-mail that is created with a .pdf attachment (or the document merge) rather than being in the body of the e-mail text

An existing word document can be used via browsing to the document, and then click on *Store document*:

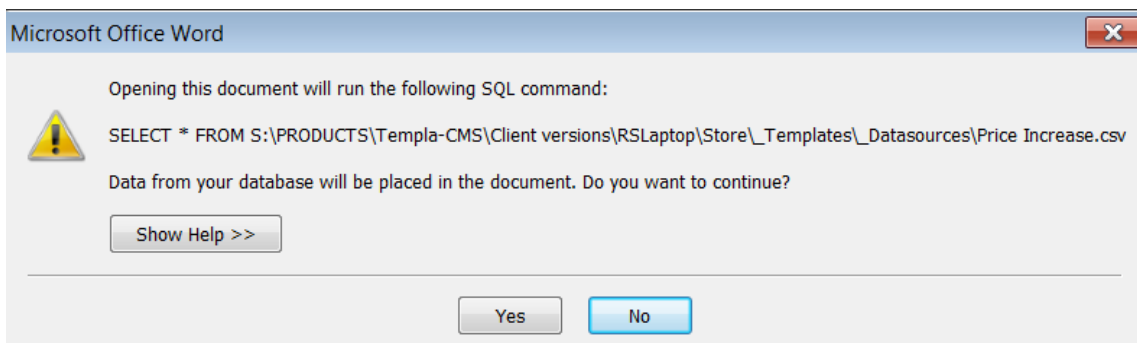


The *Store document* option will only be enabled where the template document wasn't created in TemplaCMS.

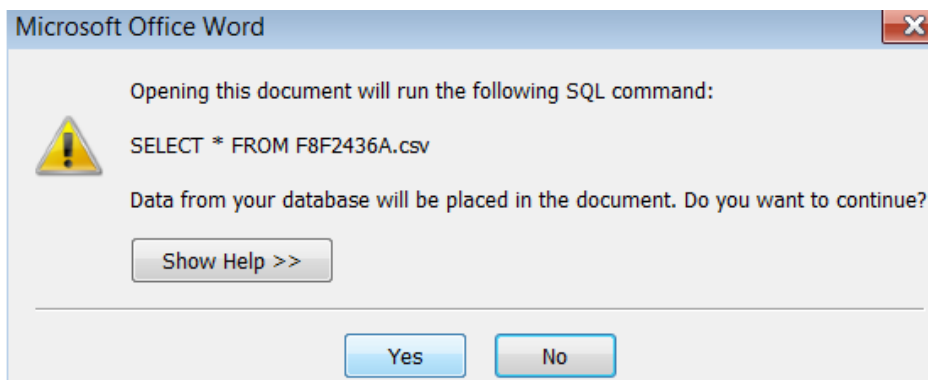
To create a new template document, click on *Create document* from the *Document Template* screen:



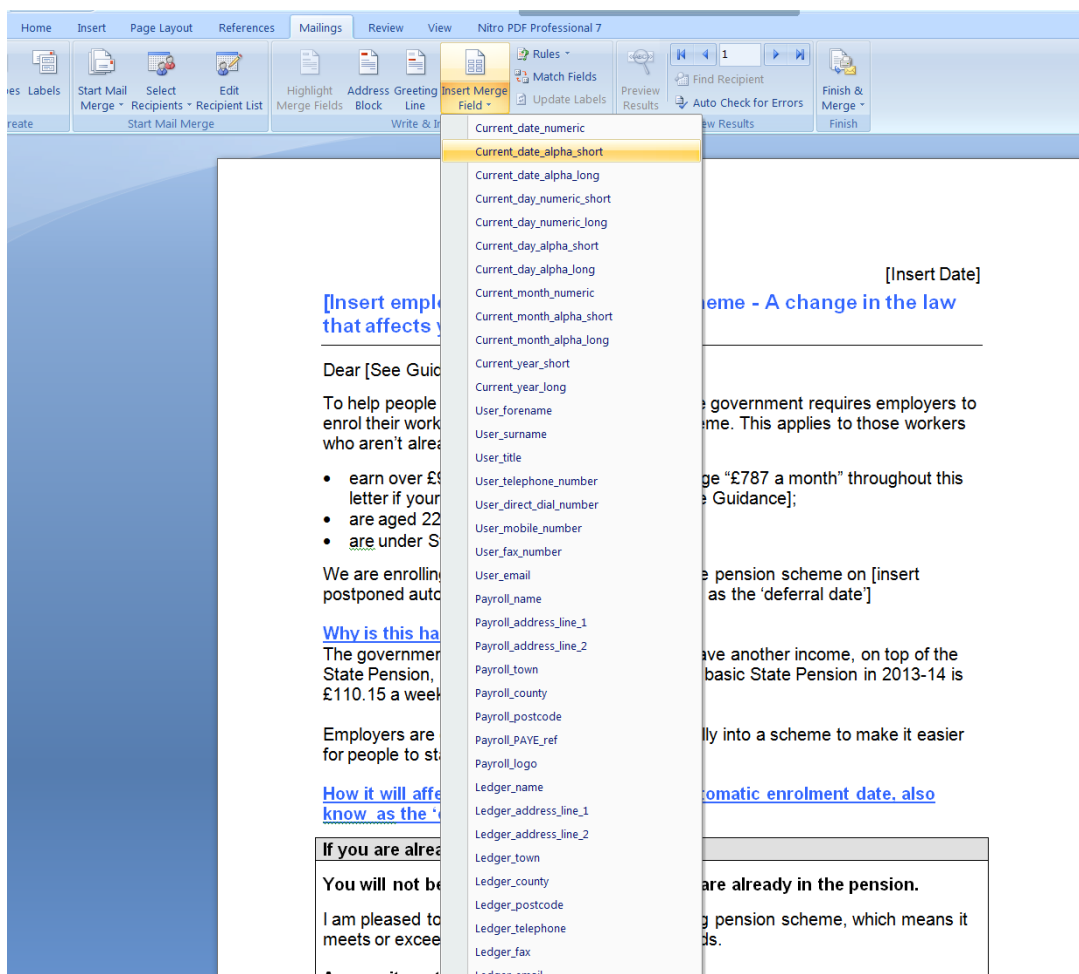
At this point, TemplaCMS will attempt to launch MS Word and the following message will appear. Click on Yes to continue:



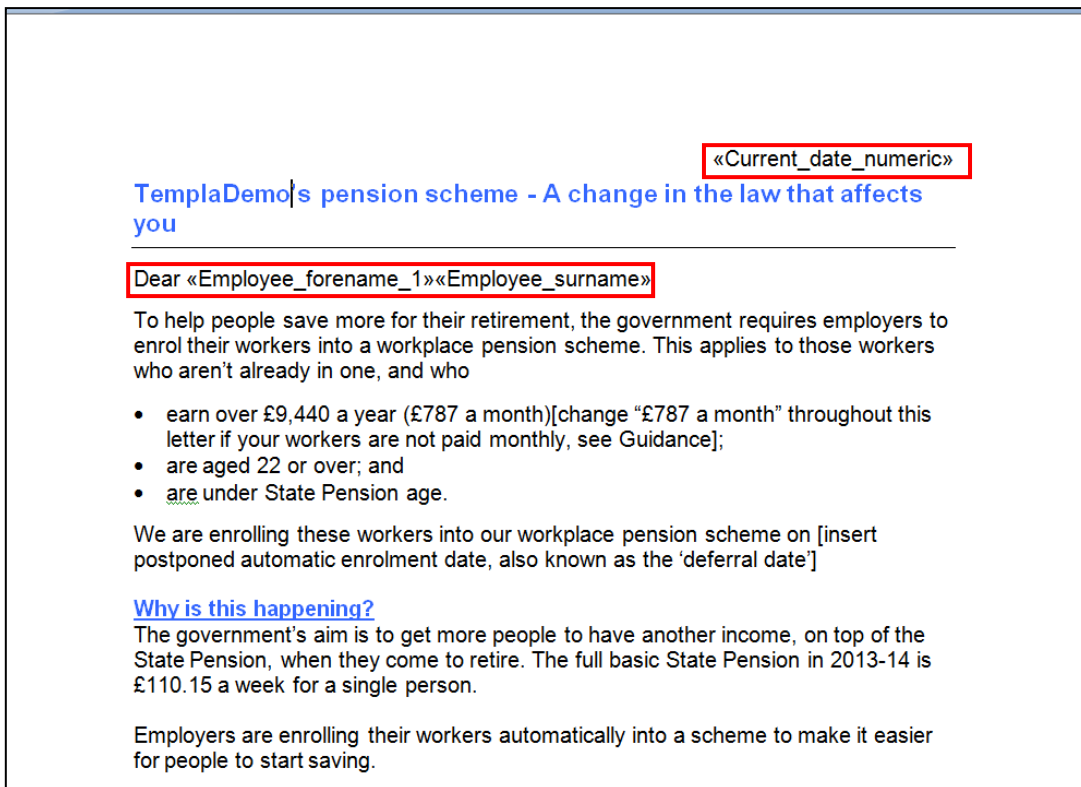
On the following screen click on Yes to continue:



Create the letter in MS Word and use the *Insert Merge Field* option from the *Mailings* tab to select and insert the relevant merge fields. The fields from TemplaCMS available to merge will be displayed on this list in addition to the standard Microsoft Office fields:



For example, on the below the 'Current date' (from MS Word) and the 'Employee Forename' and 'Surname' (from TemplaCMS) have been inserted:



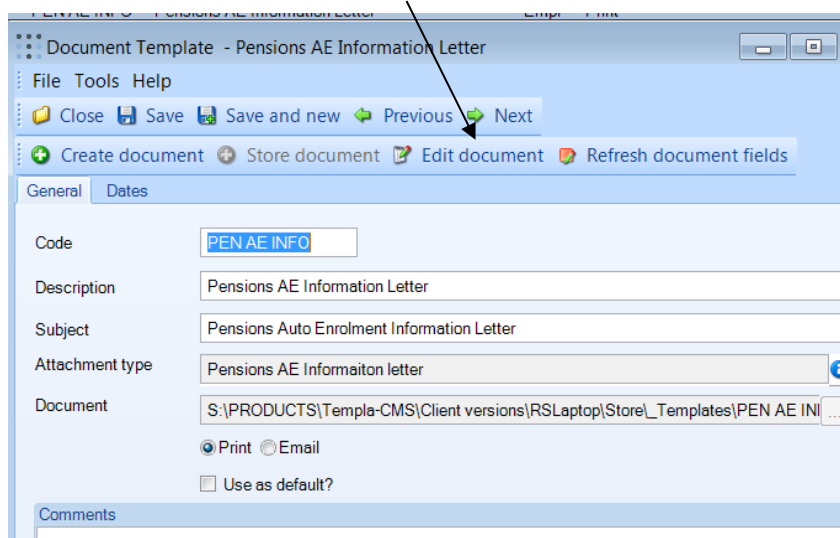
Once the document is completed, click on 'Save' in MS Word and save back in CMS as well.

**Please note that the merging functionality is available in the header and footer of a document and can be used for 'Print' document templates.**

**For 'E-mail' document templates, any merge information in the header and footer of the document will be ignored.**

## AMEND A DOCUMENT TEMPLATE

To make changes to the document template, the 'Edit document' option can be used:



**The 'Refresh document fields' option refreshes the merge fields available to use in MS Word and should be used in the below scenarios:**

- On all document templates if the user has upgraded to a new version of CMS as new fields may become available**
- If any UDP's have been changed, removed or added**

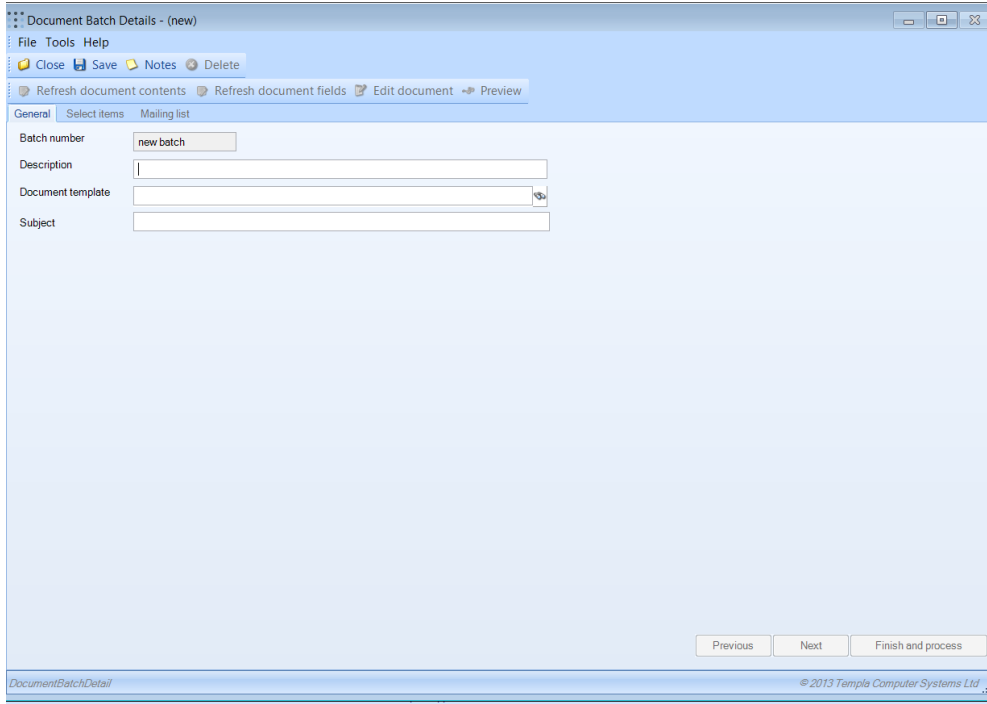


# Document mailing batches

Document mailing batches can be created in one of two ways.

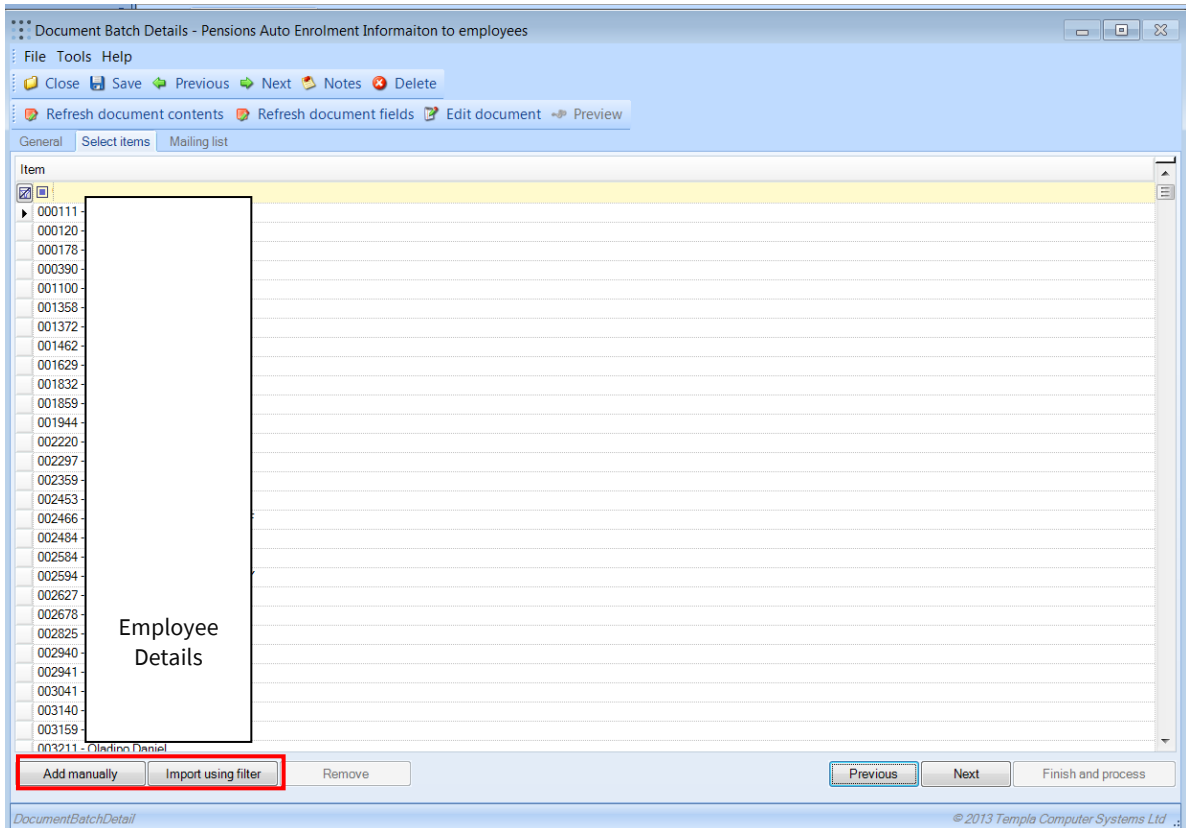
## DOCUMENT MAILING BATCHES FROM 'DOCUMENT MANAGEMENT':

To create a 'Document Mailing batch' click on 'New' from the 'Document Mailing Batches' option in the 'Maintenance -> Document Management' menu:



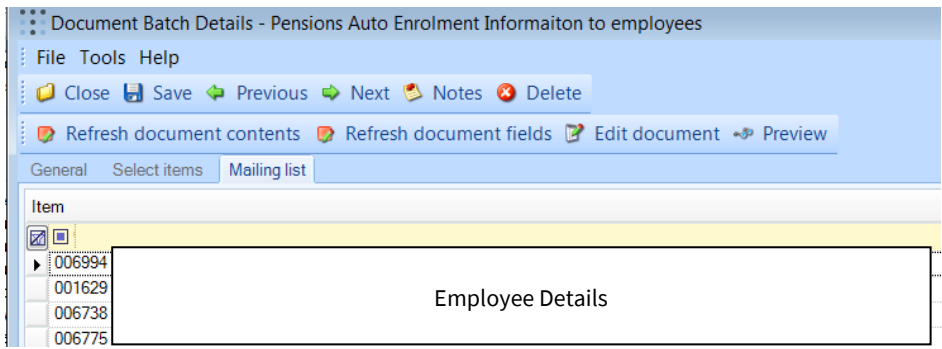
Enter a description and subject (for e-mailing) and select the relevant document template to be used.

Click on 'Next' to add items to the batch either via the 'Add manually' option or via 'Import using filter'.



Click 'Next' again to create the final Mailing list based on the selected items.

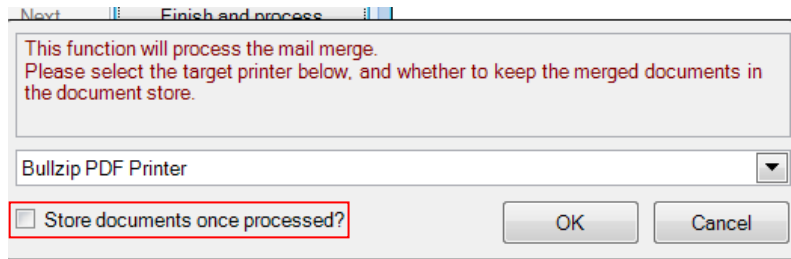
From the 'Mailing list' screen, the merged document can be viewed by selecting an employee and clicking on the 'Preview' button:



At this point, the document can be changed if needed by using the 'Refresh document contents', 'Refresh document fields' and 'Edit document' options.

Once the batch is complete, click on 'Finish and Process' at which point the merged document will be e-mailed or printed depending on the option set on the document template.

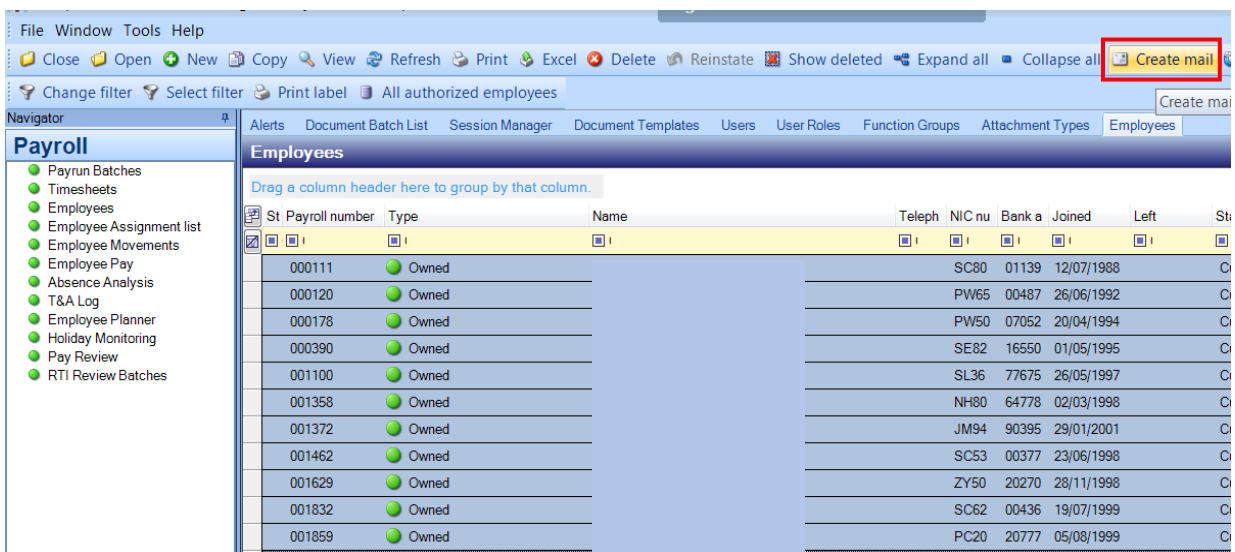
The following screen will be displayed. Tick the 'Store documents once processed?' option to save the merged document in the document store and to add it as an attachment to the defined attachment owner (e.g. employee, client etc.).



Click on 'OK' to process.

## DOCUMENT MAILING BATCHES FROM 'ATTACHMENT TYPE AREA'

If a user has the relevant function, they will have an option to 'Create mail' in any area in CMS that allows attachments. For example from the employee list:



Clicking on 'Create Mail' will launch a new 'Document Batch Detail' screen and allow the user to create the batch in the same way as described above.



TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit [teamsoftware.com](https://teamsoftware.com).