

Site Binders

TEMPLACMS

TRAINING MANUAL



COMMERCIAL STATEMENT

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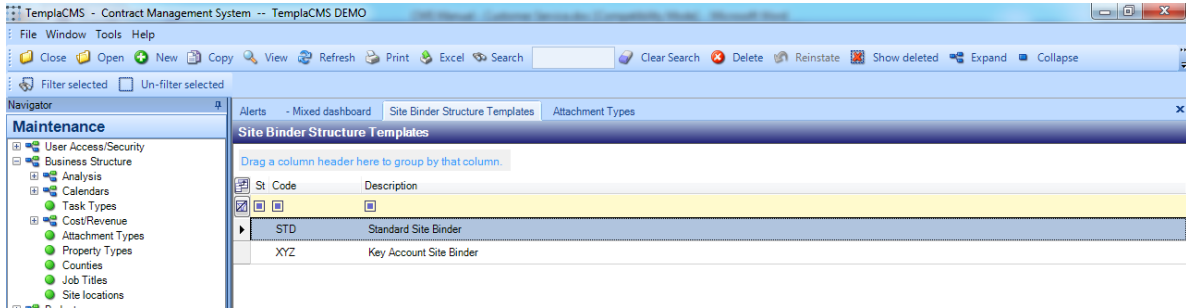
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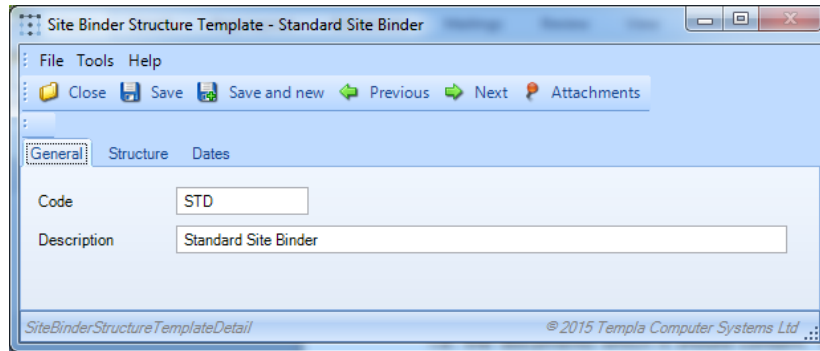
SITE BINDERS

Site Binder Structure Templates

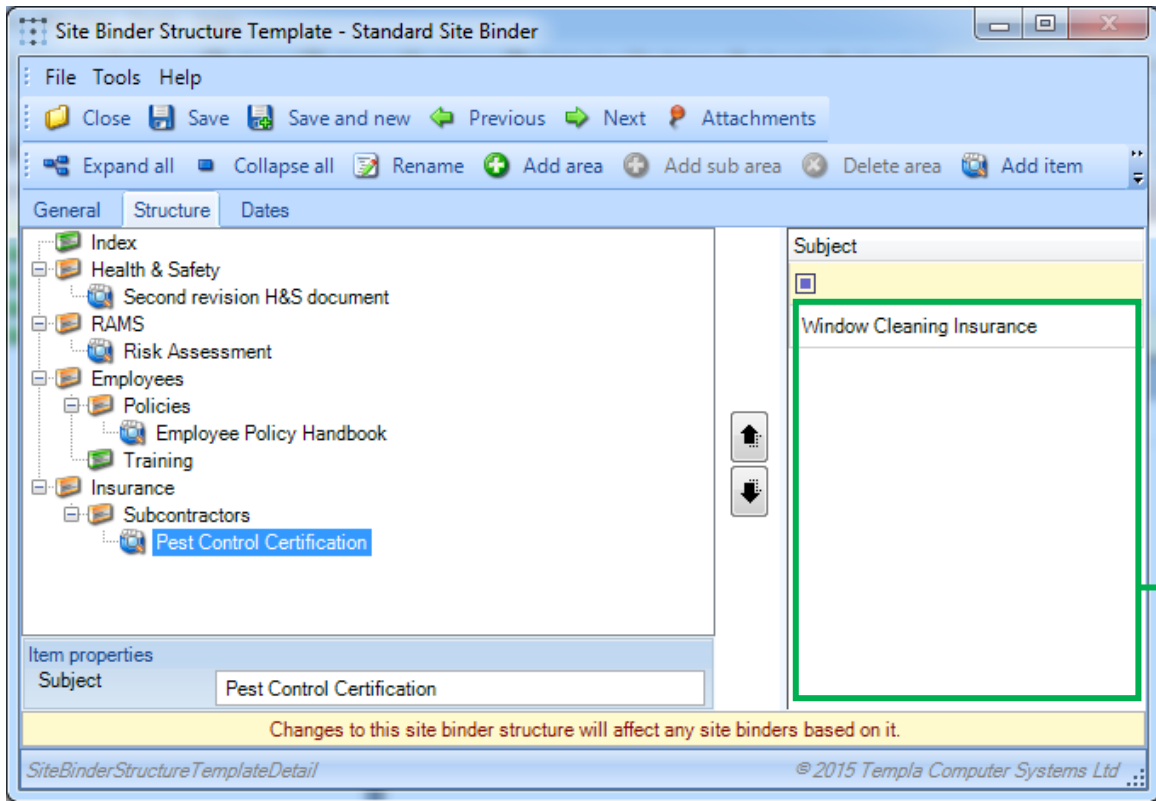
A **site binder structure template** allows documents to be grouped to create a **site bible**. The site binder structure template defines the **index** (or contents) of the site binders, i.e. the documents which it should contain. Any documents associated with the site binder structure template at setup time are likely to be company-wide documents, e.g. company policy documents, insurance documents for key subcontractors, etc. One or many site binder structure templates can be defined, as there may be a standard set of documents for most sites, and then a specific set for some sites (e.g. where a different company policy is in effect and/or where a different insurance document is relevant).



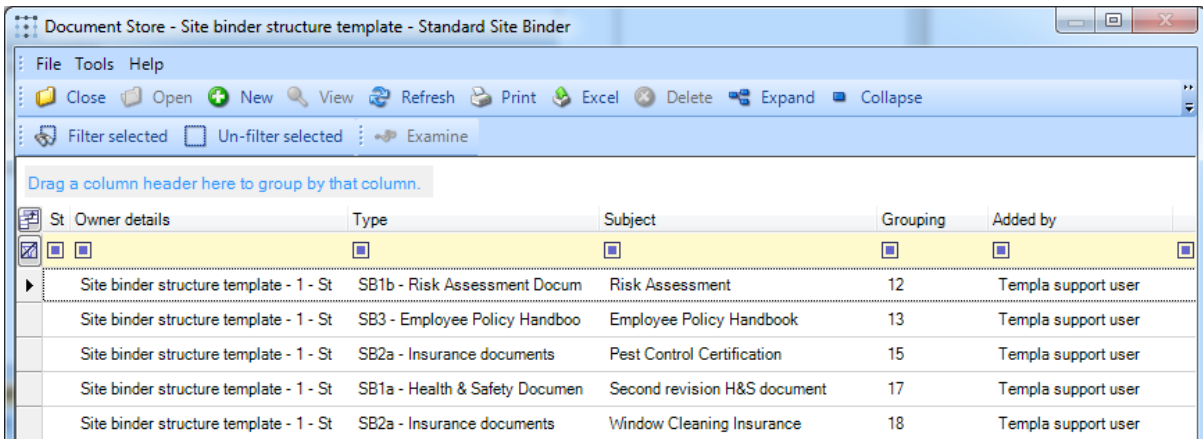
A site binder structure template defines the index for the site binder folder.



Similar to other areas of the system, areas and sub-areas can be defined:



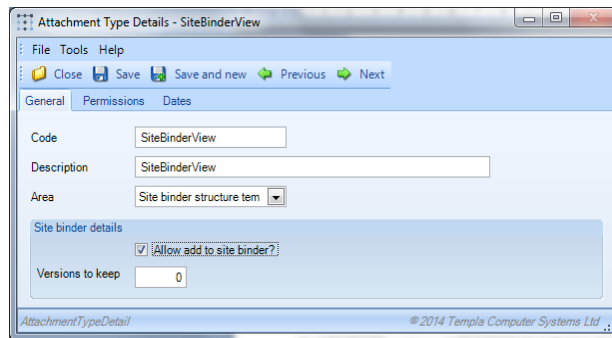
Add items allows any site-binder wide documentation to be created:



Only documents with a **site binder structure item** area will appear in these above screens and documents can only be added to the site binder structure template via the right-pane.

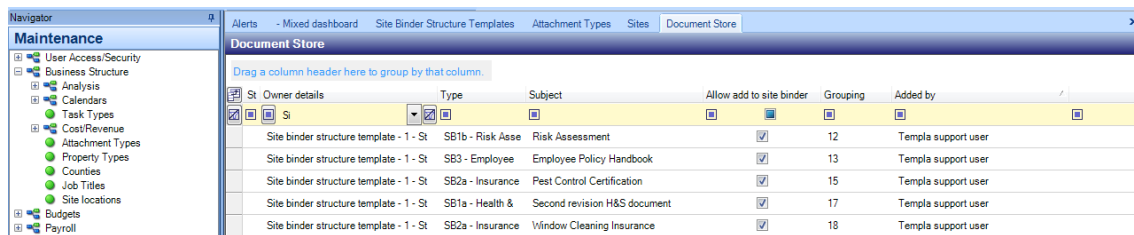
Attachment Types (for Site Binders)

Any **document** (file or email) can be attached to a record (i.e. a data item) and stored in the **document store** and in doing so the file is associated with an **attachment type**. The attachment type currently serves to classify and control user role permissions to the files held in the document store. Where attachment types are associated with the area **site binder structure**, they have now been enhanced to control whether they are added to the document store and how many versions are allowed to exist (see sub-section below), via the following two options:



Document Store

When adding a file to the document store, the existing **in site binder** checkbox will now be defaulted from the above attachment type-level setting, though the user may override it. However, any document store file may be marked as **in site binder** not just those that are **owned** by a site.



Owner details	Type	Subject	Allow add to site binder	Grouping	Added by
St	SB1b - Risk Asse	Risk Assessment	<input checked="" type="checkbox"/>	12	Templa support user
St	SB3 - Employee	Employee Policy Handbook	<input checked="" type="checkbox"/>	13	Templa support user
St	SB2a - Insurance	Pest Control Certification	<input checked="" type="checkbox"/>	15	Templa support user
St	SB1a - Health &	Second revision H&S document	<input checked="" type="checkbox"/>	17	Templa support user
St	SB2a - Insurance	Window Cleaning Insurance	<input checked="" type="checkbox"/>	18	Templa support user

DOCUMENT STORES FILE – VERSION CONTROL

If the number of **versions to keep** is specified (i.e. non-zero) on the attachment type, the adding of a new file to the document store will manage this, and any impact it may have on-site binders. For example, a COSHH sheet attachment type would likely be set to have just 1 version per product, thus ensuring that any new COSHH sheet replaced a pre-existing one both on the product, and in any site binders where it was referenced.

When saving a document store file where version control is required, the following will occur:

1. The number of existing files for the same owner, and of the same attachment type will be determined
2. Where the number now exceeds the number to keep, the oldest documents will be marked as superseded (with a reference to the latest version of the file), and thus hidden from view
3. Where a superseded document store file exists within any site binder, it will be updated to reference the document store file that superseded it

Please Note: With the large number of sites that can exist, a change of this nature to a widely used document could take time to process. For this reason, the resolution of document store file versions will be carried out on the 'batch' processing queue.

DOCUMENT TEMPLATES

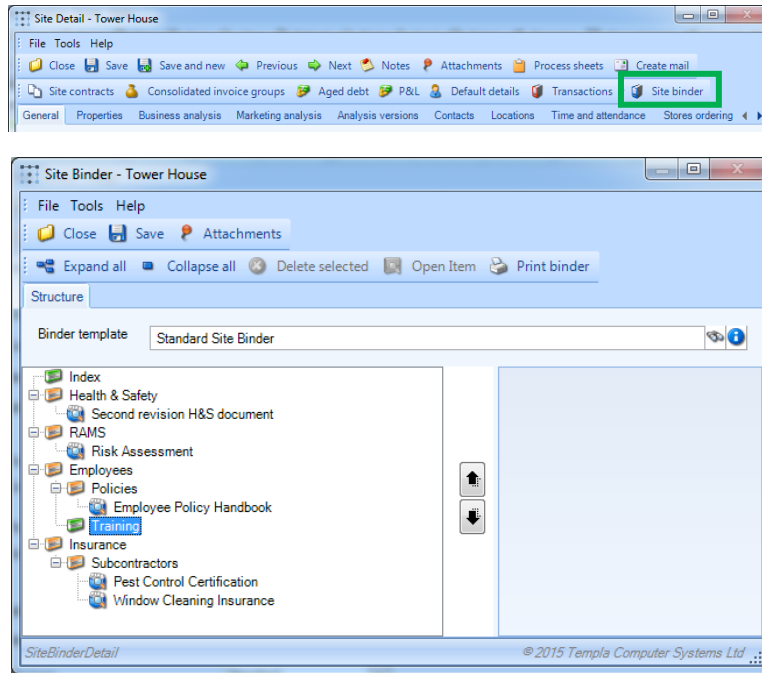
Document templates are associated with attachment types, as the result of a mailing batch is held in the document store under the nominated attachment type.

STAFF TRAINING FORMS AND DATA FORMS

The results of either staff training form or data form completion will create PDF document store files that may be flagged as **in site binder**.

Sites

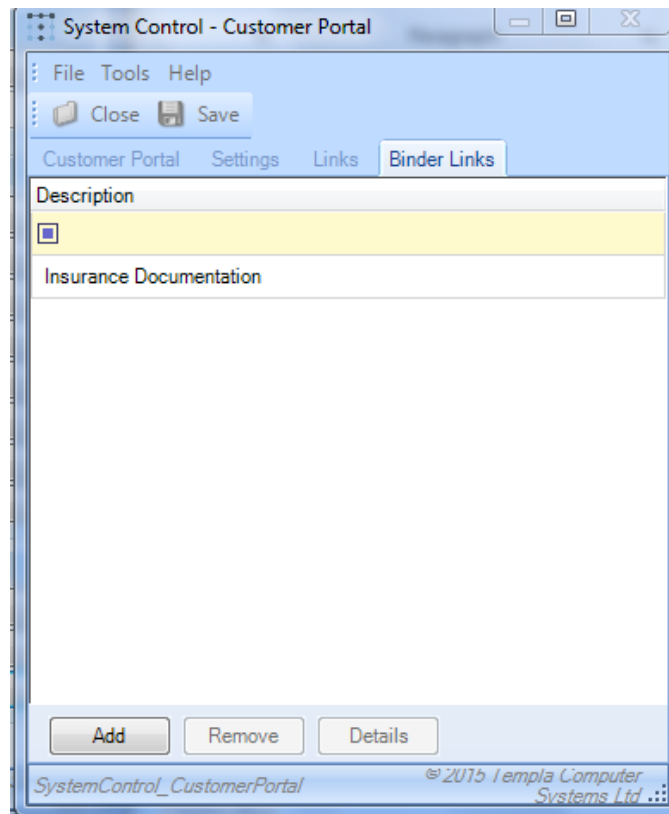
When adding a site binder to a site, the relevant site binder must be selected:



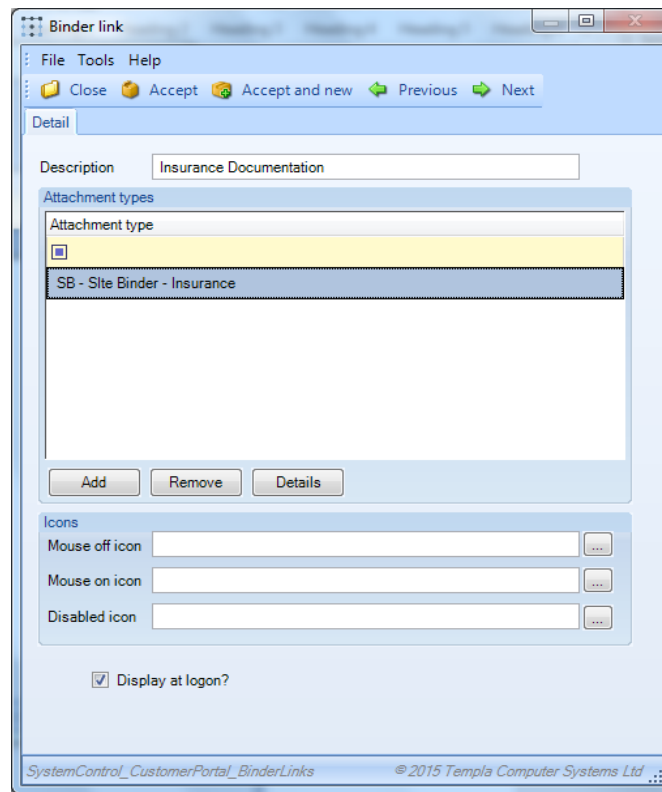
SYSTEM CONTROL – BINDER LINKS

This option allows for extra buttons on the Customer Portal to be defined. These buttons will then display all documents listed for the **attachment types selected** that appear on the client's site binder.

Each item on this screen would result in an additional button on the Customer Portal:



When defining each item (i.e. each extra button) then the following details are required on the 'Binder Link' definition screen:



Description: The description of the extra button/area on the Customer Portal

Attachment types: This allows the user to select the desired attachment type(s); all documents saved against the site binder for the attachment types defined will then be displayed within the new webpage.

Icons:

- **Mouse off icon** – This allows you to set the mouse off icon path; this will be the icon the user will see when the mouse is not hovered over the link.
- **Mouse on icon** – This allows you to set the mouse on icon path; this will be the icon the user will see when the mouse is hovered over the link.
- **Disabled icon** – This allows you to set the Disabled icon path; this will be the icon the user will see when the user is not logged in to TemplaCMS Customer Portal.

Please Note: These paths must be accessible by the IIS server, so that these files can be used by the website - as such it's recommended that they are saved within the Document Store.

Display at Logon: This allows the user to control which buttons (i.e. areas) display when initially hitting the logon webpage as if different clients have access to different areas then just the logon button or just the common areas could be displayed at logon.



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