# How to: create document templates

Within EMS there is functionality to have document templates uploaded to specific locations and job titles. These documents can contain Mail Merge fields that will pick up the information from the relevant employee files.

This functionality is great for contracts or specific letters that need to be sent out when an employee joins the company, so long as the employee has been created on EMS the documents can then be produced with the correct information.

Before going into EMS the word document for uploading need to be created. Follow the steps described here:

1

Create the document in Microsoft Word: where the information should be pulled from the employee's file in EMS enter a mail merge field (See step 4 on page 2 of this how 2 for all the mail merge options available).

The document can contain images e.g. headed paper etc, however, they need to be under 3MB in size and saved as a DOC file.

Fourth Hospitality Test

<?Firstname?> <?Surname?>
<?EmployeeAddress1?>
<?EmployeeAddress2?>
<?EmployeeTown?>
<?EmployeeCounty?>
<?EmployeePostCode?>

Dear <?Firstname?>,

Welcome to the company!

You will be joining us on the <?StartDate?>, in the position of <?JobTitle?>.

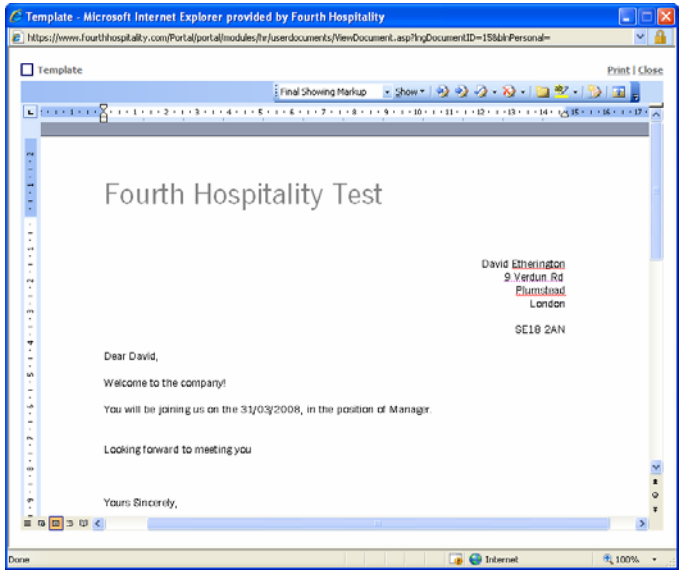
Looking forward to meeting you

Yours Sincerely,

General Manager

2

This is a test example of what the document will look like when it is accessed from the employee's file. It opens as a basic word file, which means amendments can be made if necessary. Alternatively it can be saved and opened in Word to enable using Word's full functionalities.

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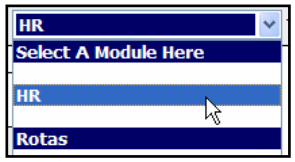
Mail Merge fields available:

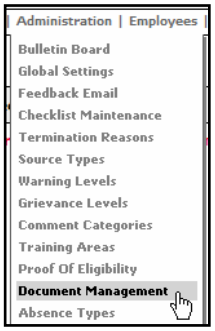
| Field name in EMS | Enter on word DOC |
|---|---|
| Title | <?Title?> |
| First name | <?Firstname?> |
| Surname | <?Surname?> |
| Address 1 | <?EmployeeAddress1?> |
| Address 2 | <?EmployeeAddress2?> |
| Address 3 | <?EmployeeAddress3?> |
| Address 4 | <?EmployeeAddress4?> |
| Town | <?EmployeeTown?> |
| County | <?EmployeeCounty?> |
| Post Code | <?EmployeePostCode?> |
| Location | <?Location?> |
| Location Address 1 | <?LocationAddress1?> |
| Location Address 2 | <?LocationAddress2?> |
| Location Address 3 | <?LocationAddress3?> |
| Location Address 4 | <?LocationAddress4?> |
| Location Address Town | <?LocationTown?> |
| Location Address County | <?LocationCounty?> |
| Location Address Postcode | <?LocationPostCode?> |
| Division | <?Division?> |
| Salary | <?Salary?> |
| Job Title | <?JobTitle?> |
| Rate (£/hr or shift) | <?PayAmount?> |
| Pay Period (i.e. hour shift) | <?PayType?> |
| Company | <?Company?> |
| Primary Absence Manager | <?PrimaryAbsenceManager?> |
| Secondary Absence Manager | <?SecondaryAbsenceManager?> |
| Primary Expense Manager | <?PrimaryExpenseManager?> |
| Second Expense Manager | <?SecondaryExpenseManager?> |
| Primary Holiday Manager | <?PrimaryHolidayManager?> |
| Secondary Holiday Manager | <?SecondaryHolidayManager?> |
| Primary Timesheet Manager | <?PrimaryTimesheetManager?> |
| Second Timesheet Manager | <?SecondaryTimesheetManager?> |
| Start Date | <?StartDate? |
| Employee Number | <?EmployeeNumber?> |
| Date of Birth | <?DateofBirth?> |
| NI Number | <?NINumber?> |
| Home Tel | <?HomeTel?> |
| Mobile | <?MobileTel?> |
| Email | <?Email?> |
| Employee Status | <?EmployeeStatus?> |
| User Level | <?UserType?> |
| Holiday Allowance | <?HolidayAllowance?> |
| Bank Name | <?BankName?> |
| Bank Address 1 | <?BankAddress1?> |
| Bank Address 2 | <?BankAddress2?> |
| Bank Address 3 | <?BankAddress3?> |
| Bank Address 4 | <?BankAddress4?> |
| Bank Address Town | <?BankTown?> |
| Bank Address County | <?BankCounty?> |
| Bank Address Postcode | <?BankPostCode?> |
| Sort Code | <?SortCode?> |
| Account Number | <?AccountNumber?> |
| Account Name | <?AccountName?> |
| Payment Method | <?PaymentMethod?> |

# How to: create document templates

Log into EMS and select the **HR** module from the dropdown:




From the **Administration** dropdown select **Document Management**

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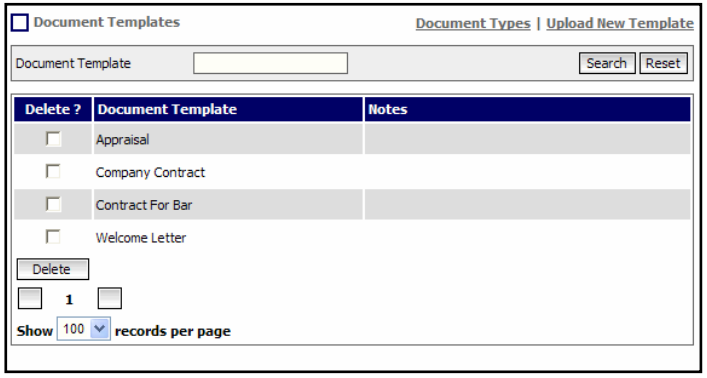
From this area select Document Templates. If this function has been used previously there may be templates already uploaded. These can be deleted at any time, however, make sure that there is a hard copy stored on site or scanned and uploaded to the employee file if necessary as it will delete the template from their file.

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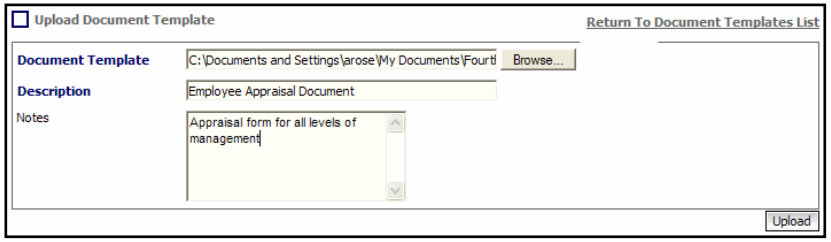
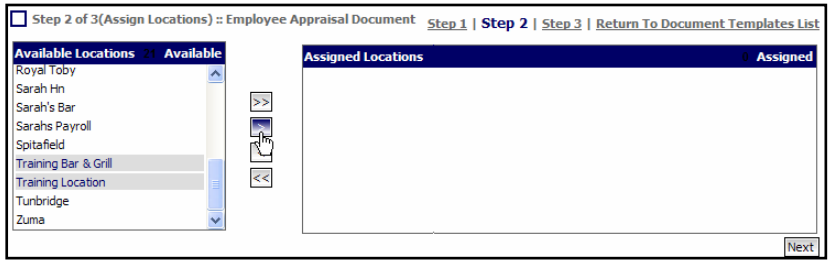
To create a new document template follow the link to **Upload Document Template**

7

Browse for the DOC file to upload, and enter a description for it, notes are optional:




Select the locations that this document is applicable to, single arrows move the selected locations across, whereas the double arrow moves all the locations across:

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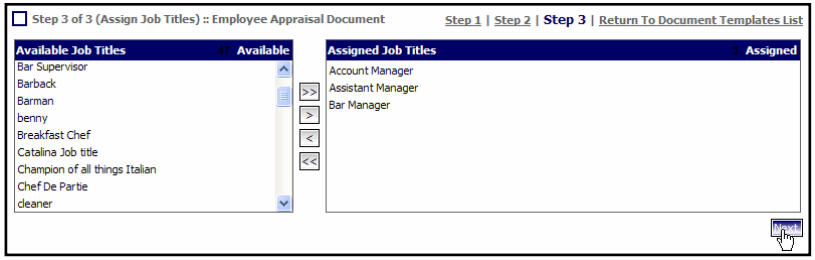
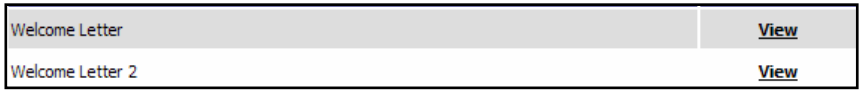
Use the same functionality to assign the document to the applicable job titles within the locations:




Once the document is uploaded to the portal, test that it is working by entering an employee file that has had the document assigned to it. Select Document Management from the first dropdown, and click View to see if it is working correctly, as in the example within step 3:

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