

Consult Carswell Document Builder Quick Reference Card

01 Accessing Document Builder

To access Document Builder, click the [Document Builder](#) link on the Home page.

A rectangular button with a yellow background and a black border, containing the text "Document Builder" in black.

Figure 1

Document Builder opens in a separate window and loads the Company Details page.

02 Getting Started

Begin by entering your company details.

1. Enter your contact details into the fields provided. These details will populate across all the documents in their relevant places.
2. Decide whether you want to refer to the employer as an “Organization”, “Company”, “Firm”, etc. throughout the documents you create.
3. Determine if you wish to receive the email alerts regarding policy updates.
4. Click **Save**.

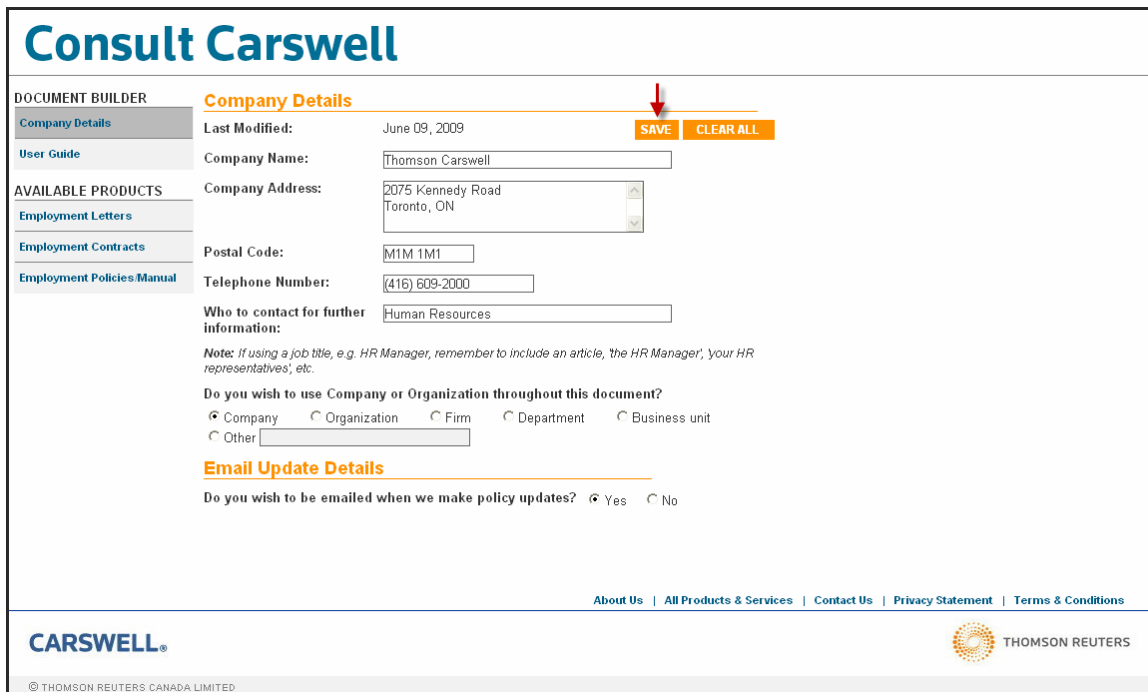
A screenshot of the "Consult Carswell" Document Builder interface. The page title is "Consult Carswell". Below the title is a navigation menu with "DOCUMENT BUILDER" and "Company Details" (highlighted). The main content area is titled "Company Details" and contains several sections: "Last Modified: June 09, 2009" with "SAVE" and "CLEAR ALL" buttons; "Company Name: Thomson Carswell"; "Company Address: 2075 Kennedy Road, Toronto, ON"; "Postal Code: M1M 1M1"; "Telephone Number: (416) 609-2000"; "Who to contact for further information: Human Resources"; a note about job titles; a question "Do you wish to use Company or Organization throughout this document?" with radio buttons for Company, Organization, Firm, Department, Business unit, and Other; and "Email Update Details" with a question "Do you wish to be emailed when we make policy updates?" and radio buttons for Yes and No. A red arrow points to the "SAVE" button. The footer includes "CARSWELL.", "THOMSON REUTERS", and "© THOMSON REUTERS CANADA LIMITED".

Figure 2

03 Table of Contents

To retrieve the Table of Contents for a specific product, select it from the **Available Products** list on the left side of the Company Details page. You can choose from the following:

- **Employment Letters.** Create and customize letters for various individual employment situations.
- **Employment Contracts.** Create a comprehensive contract of employment by choosing and customizing the contractual clauses appropriate to a particular employee's situation. Alternatively, you can also create an individualized non-competition or non-disclosure agreement.
- **Employment Policies/Manual.** Create individual employment policies for use in your organization – or create your own comprehensive employee handbook.

After selecting one of the above categories, a comprehensive list of all documents for that specific product appears. You may select a document by clicking its name. You may also check its status of completion and currency. When your document becomes out-of-date, particularly in relation to the Employment Policies/Manual, you will receive an email alerting you to any sections which will need updating and this page will show that the document is out-of-date.

View the status of your documents.

Click here to download documents.

Click a document name to access the Document Builder page.

Determine the currency of your documents.

DOCUMENT BUILDER	
Company Details	Employment Policies/Manual
Download Documents	Status Key: ✓ Complete ? Incomplete P In Progress ! Out of Date (select title to view)
User Guide	
AVAILABLE PRODUCTS	Employment Policies/Manual
Employment Letters	Introduction ✓! November 21, 2007 February 1, 2008
Employment Contracts	Code of Conduct ✓! November 15, 2007 February 1, 2008
Employment Policies/Manual	Diversity and Equality ✓! January 15, 2008 February 1, 2008
	Harassment and Bullying ✓! December 4, 2007 February 1, 2008
	Privacy P! November 21, 2007 February 1, 2008
	Communications P! November 13, 2007 February 1, 2008
	Recruitment P! January 16, 2008 February 1, 2008
	Employment Practices P! January 3, 2008 February 1, 2008
	Compensation and Benefits P! November 13, 2007 February 1, 2008
	Health and Safety P November 5, 2008 February 1, 2008
	Termination P! December 4, 2007 February 1, 2008

Figure 3

04 Document Builder Page

Once you have selected a document from the Table of Contents, you will access the Document Builder page.

Design your document quickly and easily by selecting the relevant sections to your document and answering a series of simple questions on the left side of the screen. Watch your document being created on the right side of the screen. You can save your document at any point, whether complete or not. Should you wish to start a document again, simply click **Clear All** at the top of the page to reset to a blank document.

View the history of the changes to this document.

To aid in completing your documents, legal, best practices and guide notes have been placed throughout the questions.

Select the sections you wish to include and answer questions relating to them.

The screenshot shows the 'Consult Carswell DOCUMENT BUILDER' interface. The 'User Inputs' section on the left includes three sections: 'Health and Safety' (checked), 'Serious or Life Threatening Illnesses' (checked), and 'Safety Regulations' (checked). The 'Preview' section on the right shows the resulting document content, including a 'General Health and Safety Philosophy' statement and a list of bullet points. At the top right, there are buttons for 'Return to Table of Contents', 'Return to Company Details', 'Download Document', 'Save Your Input', and 'Clear All Input'.

Figure 4

Your document is created on-screen, based on your answers to the questions on the left side.

05 Download Documents

Documents may be downloaded in three formats:

- **RTF**: Ideal for printed handbooks, letters and employment contracts.
- **PDF**: Ideal for managing control over your documents.
- **HTML**: Used for Intranet based handbooks.

To download from the Document Builder page, simply click the **Download Document** button located at the top of the page.



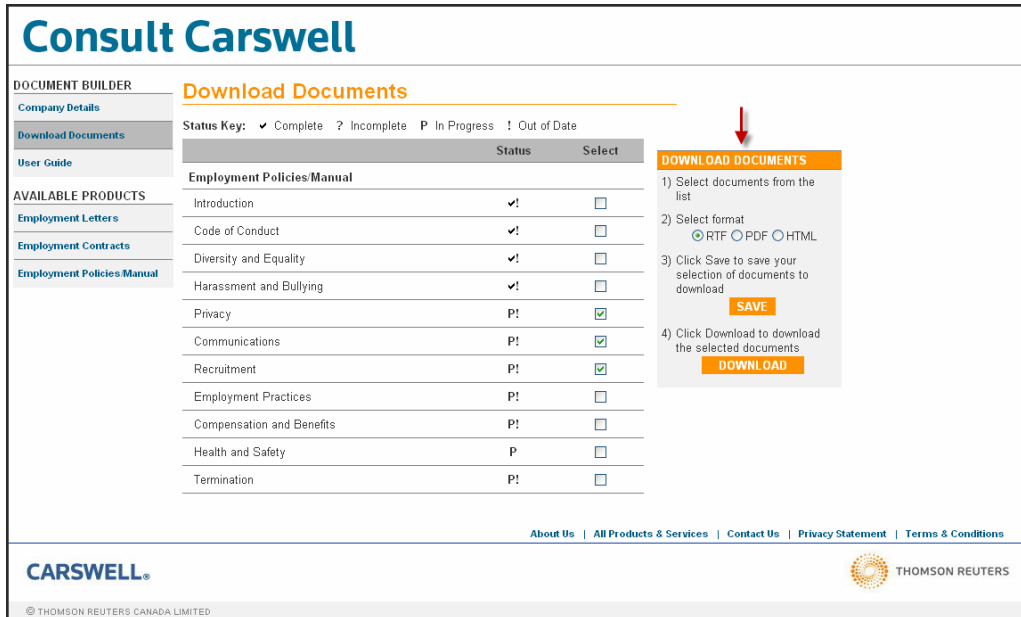
Figure 5

To download from the Table of Contents, click [Download Documents](#) on the left side of the page.



Figure 6

The Download Documents page appears:

A screenshot of the 'Consult Carswell' 'Download Documents' page. The page has a blue header with the 'Consult Carswell' logo. On the left is a 'DOCUMENT BUILDER' sidebar with a 'Download Documents' menu item highlighted. The main content area shows a table of documents under the heading 'Employment Policies Manual'. The table has columns for document names, status, and a 'Select' checkbox. A 'DOWNLOAD DOCUMENTS' panel on the right contains instructions and buttons for 'SAVE' and 'DOWNLOAD'.

	Status	Select
Employment Policies Manual		
Introduction	✓!	<input type="checkbox"/>
Code of Conduct	✓!	<input type="checkbox"/>
Diversity and Equality	✓!	<input type="checkbox"/>
Harassment and Bullying	✓!	<input type="checkbox"/>
Privacy	P!	<input checked="" type="checkbox"/>
Communications	P!	<input checked="" type="checkbox"/>
Recruitment	P!	<input checked="" type="checkbox"/>
Employment Practices	P!	<input type="checkbox"/>
Compensation and Benefits	P!	<input type="checkbox"/>
Health and Safety	P	<input type="checkbox"/>
Termination	P!	<input type="checkbox"/>

Figure 7

1. Using the checkboxes provided, select your documents from the list.
2. Select a download format using the options provided on the right side of the page.
3. Click **Save** if you wish to save the current download selection(s).
4. Click **Download**.