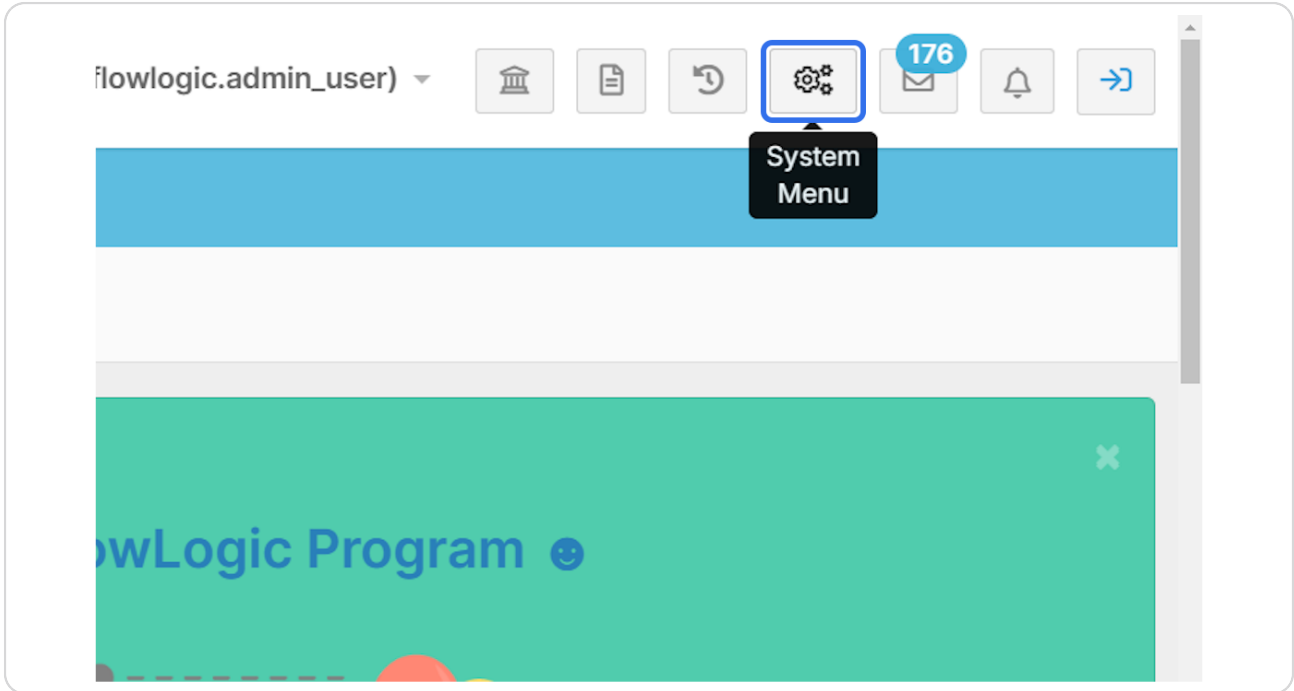


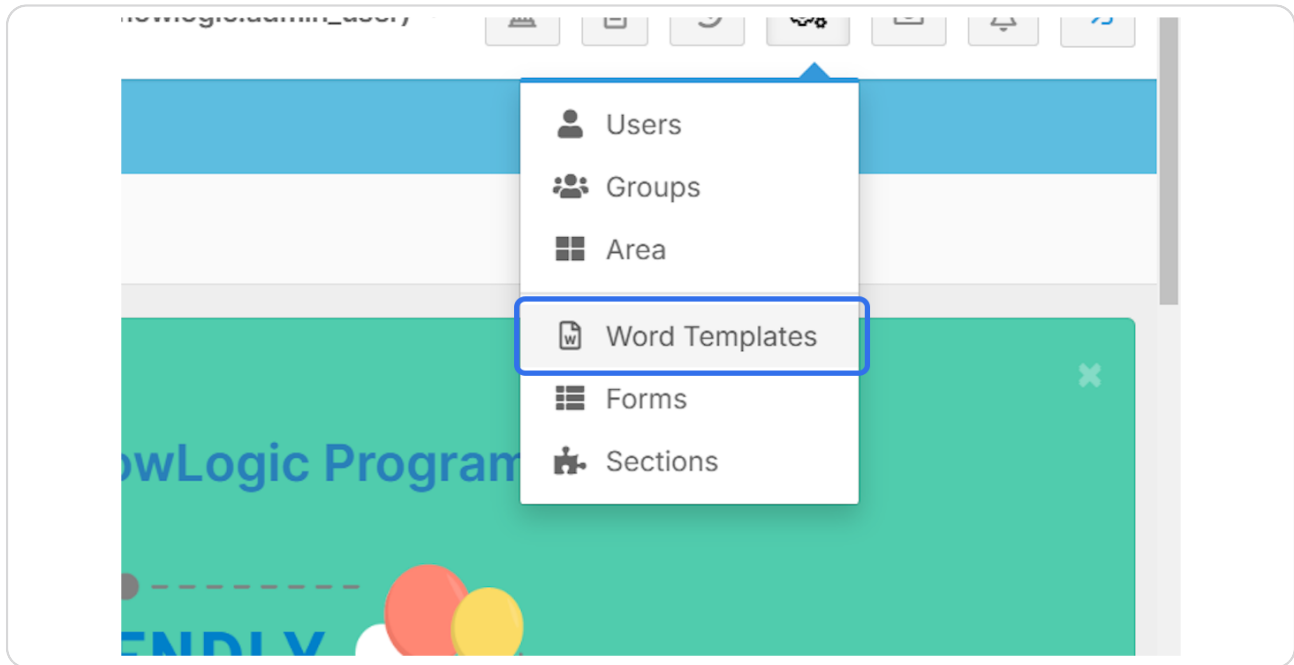
## STEP 1

### Click on System Menu



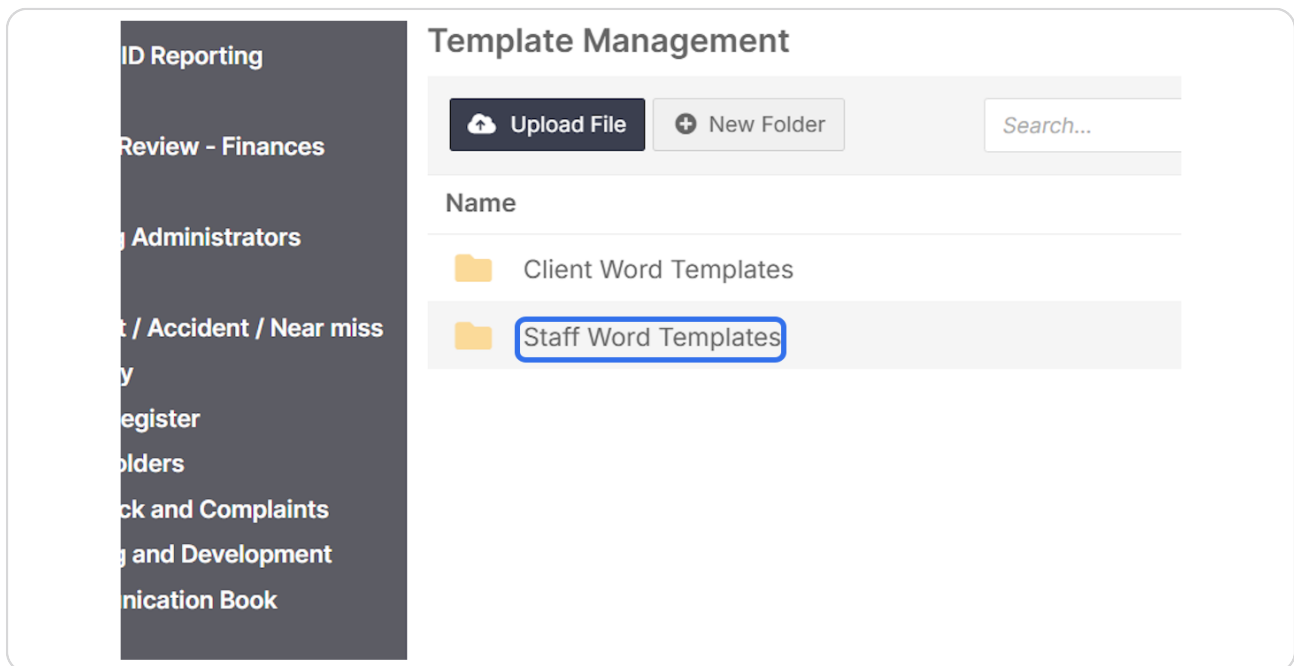
## STEP 2

### Click on Word Templates



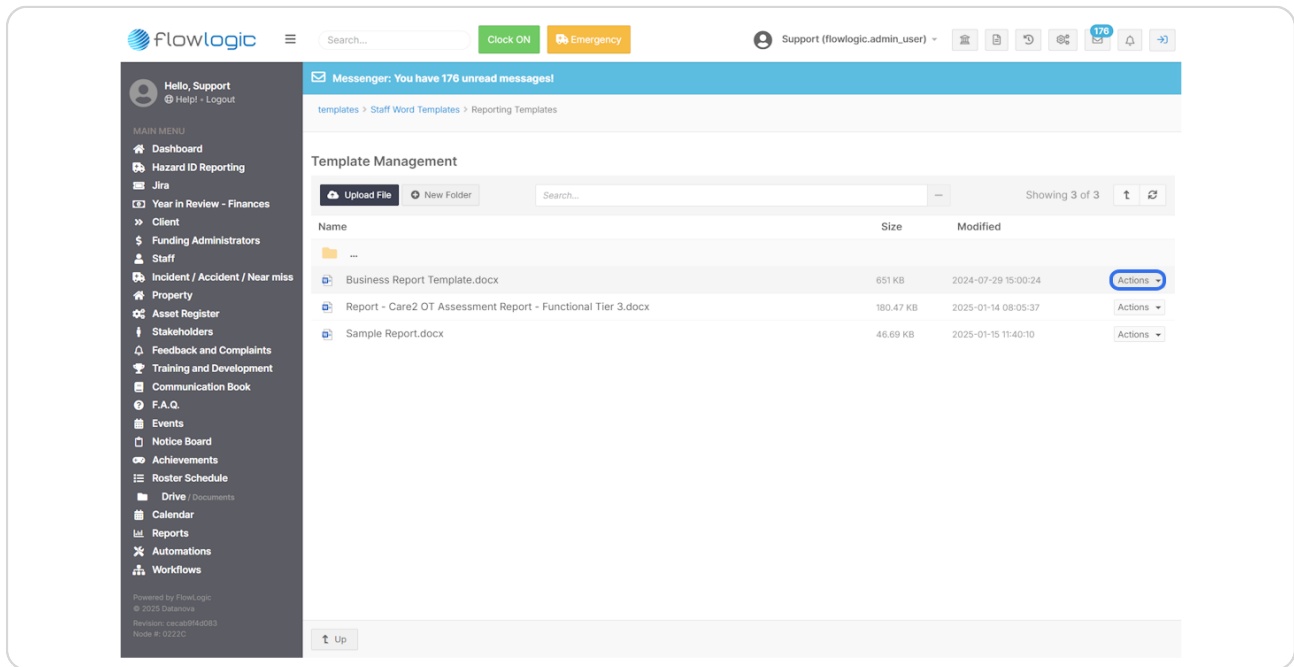
## STEP 3

### Click on your nominate folder, here mine is "Staff Word Templates"



## STEP 4

**Once inside the folder select Actions to present a further dropdown.**

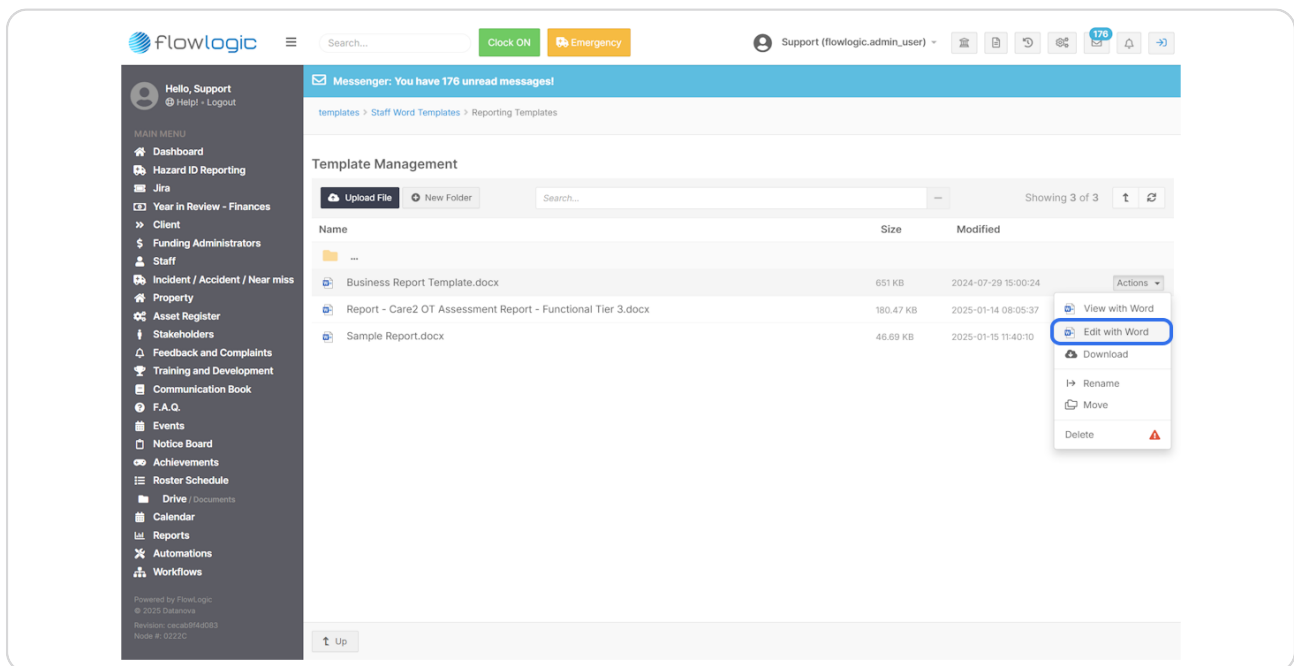


The screenshot shows the Flowlogic interface. At the top, there is a search bar, a 'Clock ON' button, and an 'Emergency' button. The user is logged in as 'Support (flowlogic.admin\_user)'. A notification banner at the top right says 'Messenger: You have 176 unread messages!'. The main content area is titled 'Template Management' and shows a list of files. The first file is 'Business Report Template.docx' (651 KB, modified 2024-07-29 15:00:24). The 'Actions' dropdown menu for this file is open, showing options: 'View with Word', 'Edit with Word', 'Download', 'Rename', 'Move', and 'Delete'.

Name	Size	Modified	Actions
Business Report Template.docx	651 KB	2024-07-29 15:00:24	Actions
Report - Care2 OT Assessment Report - Functional Tier 3.docx	180.47 KB	2025-01-14 08:05:37	Actions
Sample Report.docx	46.69 KB	2025-01-15 11:40:10	Actions

## STEP 5

**Click on Edit with Word**

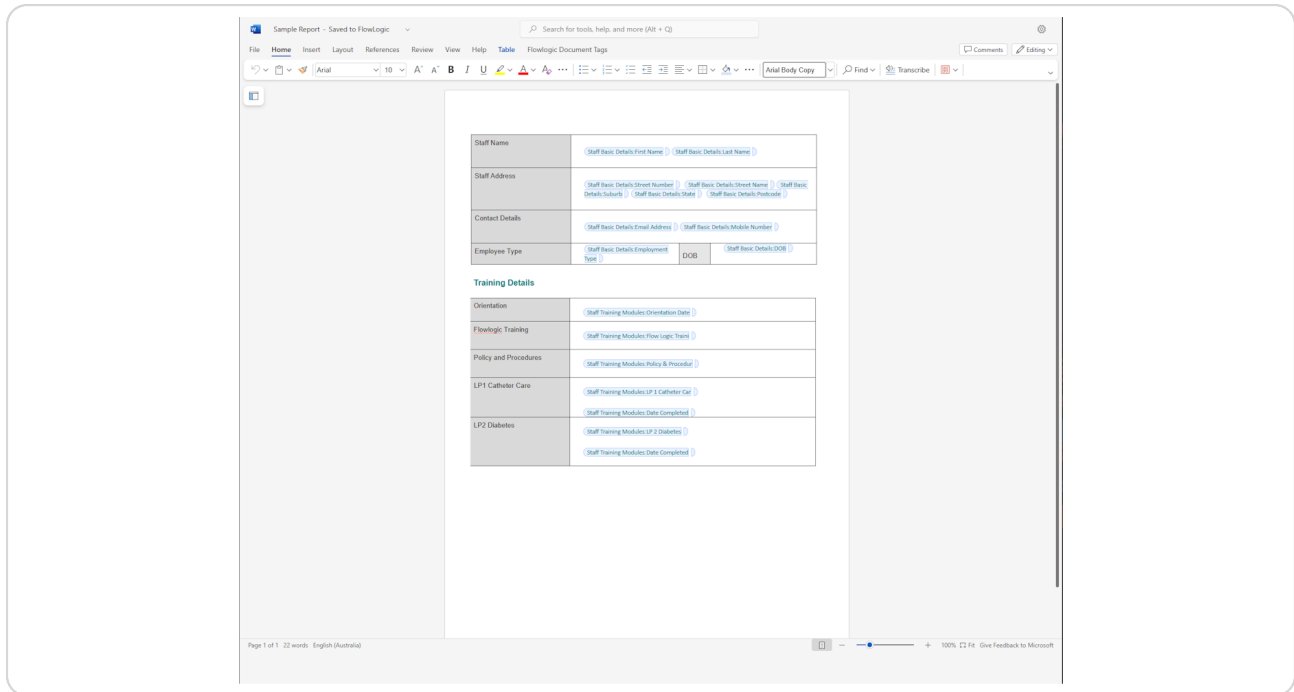


The screenshot shows the Flowlogic interface, similar to the previous one. The 'Actions' dropdown menu for the 'Business Report Template.docx' file is open, and the 'Edit with Word' option is highlighted with a red circle. The other options in the menu are 'View with Word', 'Download', 'Rename', 'Move', and 'Delete'.

Name	Size	Modified	Actions
Business Report Template.docx	651 KB	2024-07-29 15:00:24	View with Word Edit with Word Download Rename Move Delete
Report - Care2 OT Assessment Report - Functional Tier 3.docx	180.47 KB	2025-01-14 08:05:37	Actions
Sample Report.docx	46.69 KB	2025-01-15 11:40:10	Actions

## STEP 6

Once selected you will be taken to another Tab that will look similar to Word, This is where you will be able to make changes to your Templates.

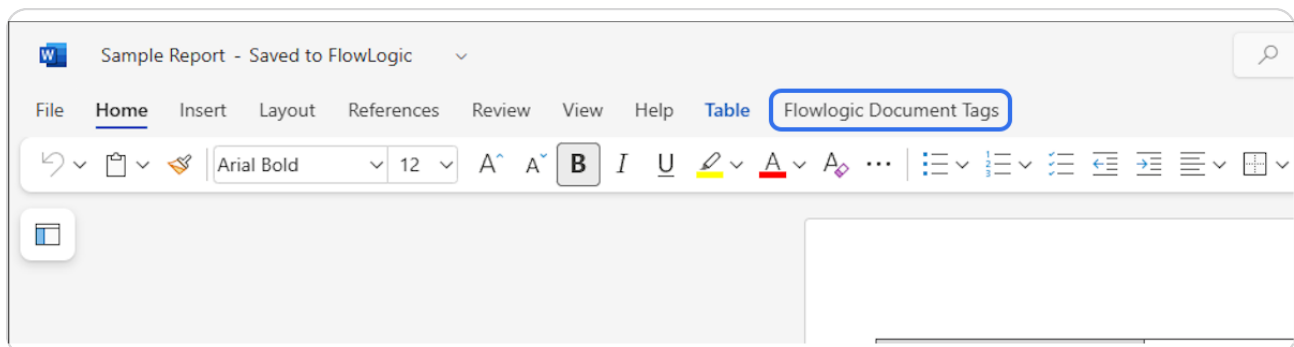


## How to Add and Remove tags from the template

5 Steps

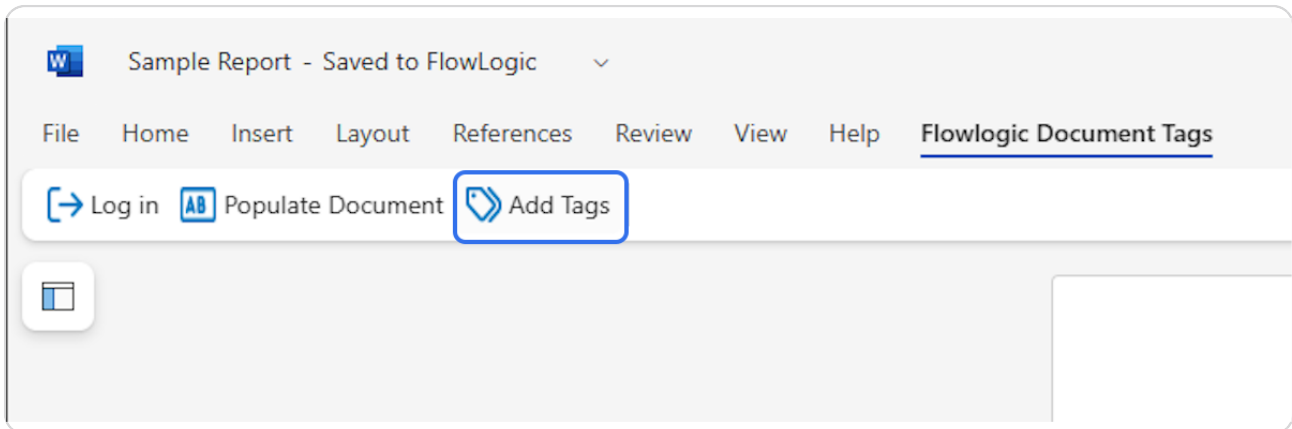
## STEP 7

Click FlowLogic Document Tags



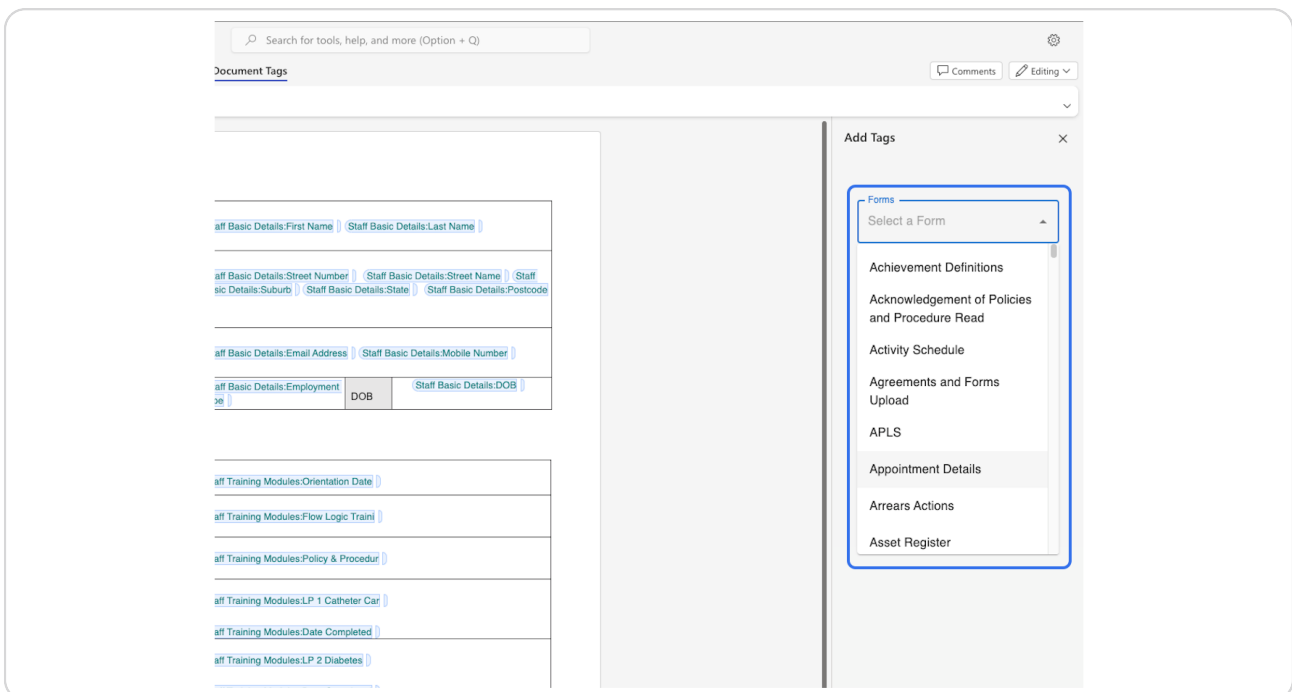
## STEP 8

### Click Add Tags



## STEP 9

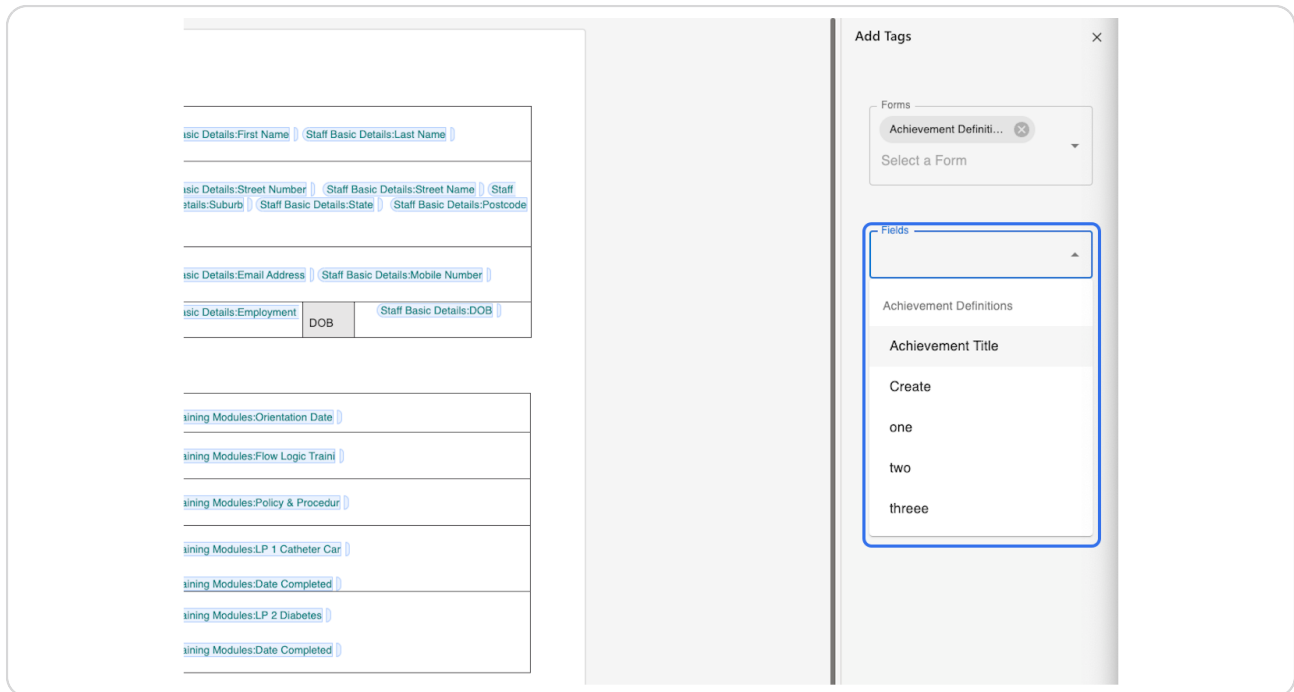
### Select the Desired Form containing the information that will automatically populate within the form.



## STEP 10

### Select the desired Field from the Fields dropdown list.

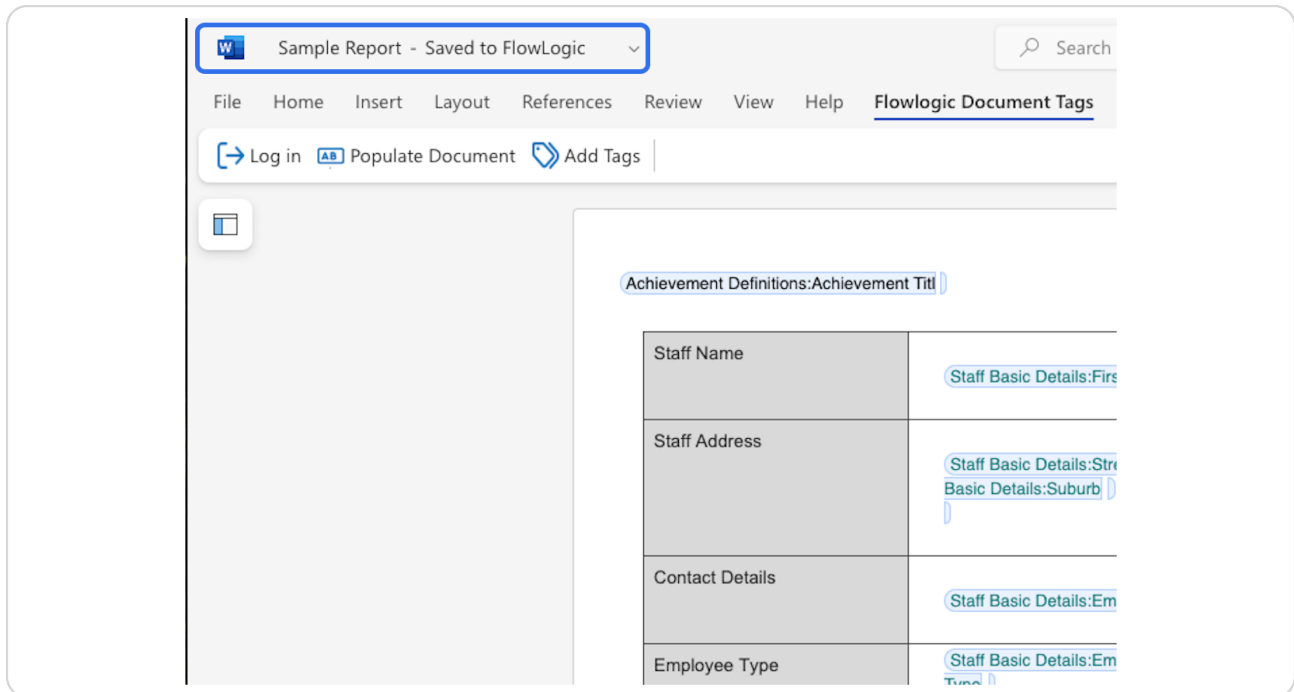
Note: When selecting the field the system will automatically place the field at your Cursor location.



The screenshot displays a form editor interface. On the left, a form is shown with several fields, each containing a blue tag with a dropdown arrow. The tags include: 'Basic Details:First Name', 'Staff Basic Details>Last Name', 'Basic Details:Street Number', 'Staff Basic Details:Street Name', 'Staff Basic Details:Suburb', 'Staff Basic Details:State', 'Staff Basic Details:Postcode', 'Basic Details>Email Address', 'Staff Basic Details:Mobile Number', 'Basic Details:Employment', 'DOB', and 'Staff Basic Details:DOB'. Below these are several 'Learning Modules' tags, such as 'Learning Modules:Orientation Date', 'Learning Modules:Flow Logic Traini', 'Learning Modules:Policy & Procedur', 'Learning Modules:LP 1 Catheter Car', 'Learning Modules>Date Completed', 'Learning Modules:LP 2 Diabetes', and 'Learning Modules>Date Completed'. On the right, an 'Add Tags' dialog box is open. It has a close button (X) in the top right corner. Under the 'Forms' section, there is a dropdown menu currently showing 'Achievement Definiti...' with a close button (X) and a 'Select a Form' label below it. Under the 'Fields' section, there is a dropdown menu with a blue border, currently showing a list of options: 'Achievement Definitions', 'Achievement Title', 'Create', 'one', 'two', and 'threee'.

## STEP 11

Repeat Steps 9 and 10 to place fields throughout the template and once complete, Verify that the upper left says "Saved to FlowLogic". Once confirmed simply close the tab.



The screenshot shows a Microsoft Word document titled "Sample Report - Saved to FlowLogic". The ribbon is set to "Flowlogic Document Tags". The document content includes a table with the following structure:

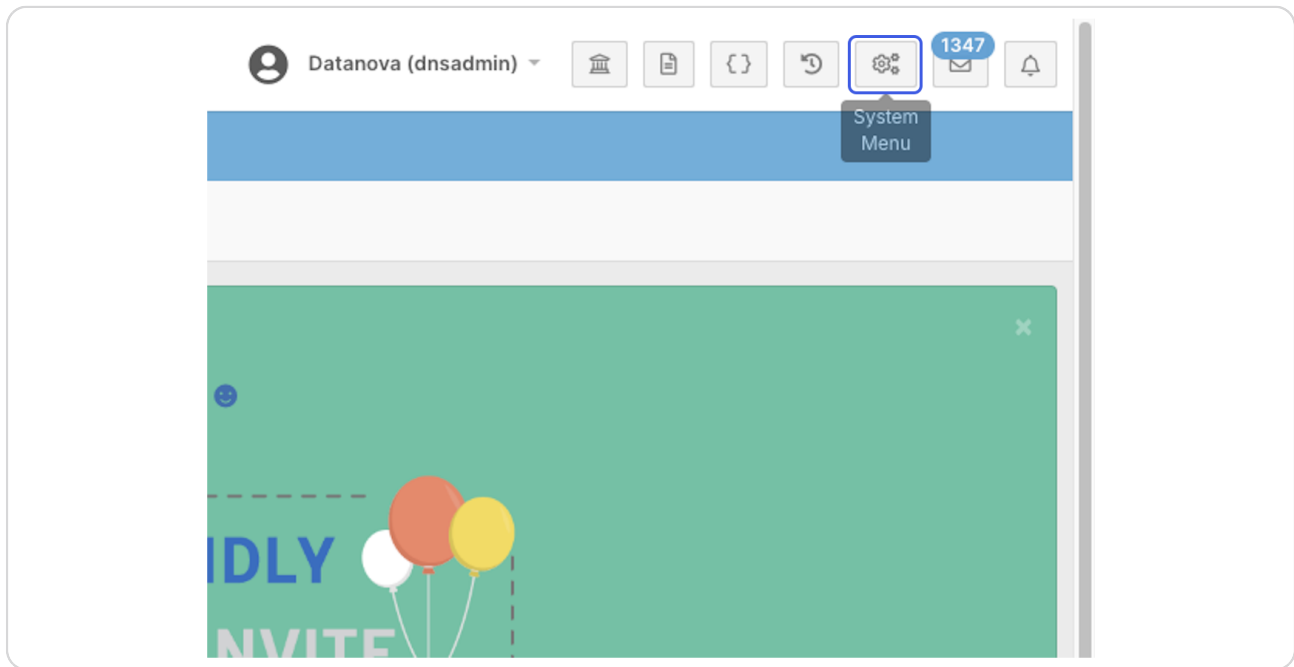
Achievement Definitions: Achievement Title	
Staff Name	Staff Basic Details: First Name
Staff Address	Staff Basic Details: Street Address Staff Basic Details: Suburb
Contact Details	Staff Basic Details: Email
Employee Type	Staff Basic Details: Employee Type

## How to Manage Permissions.

7 Steps

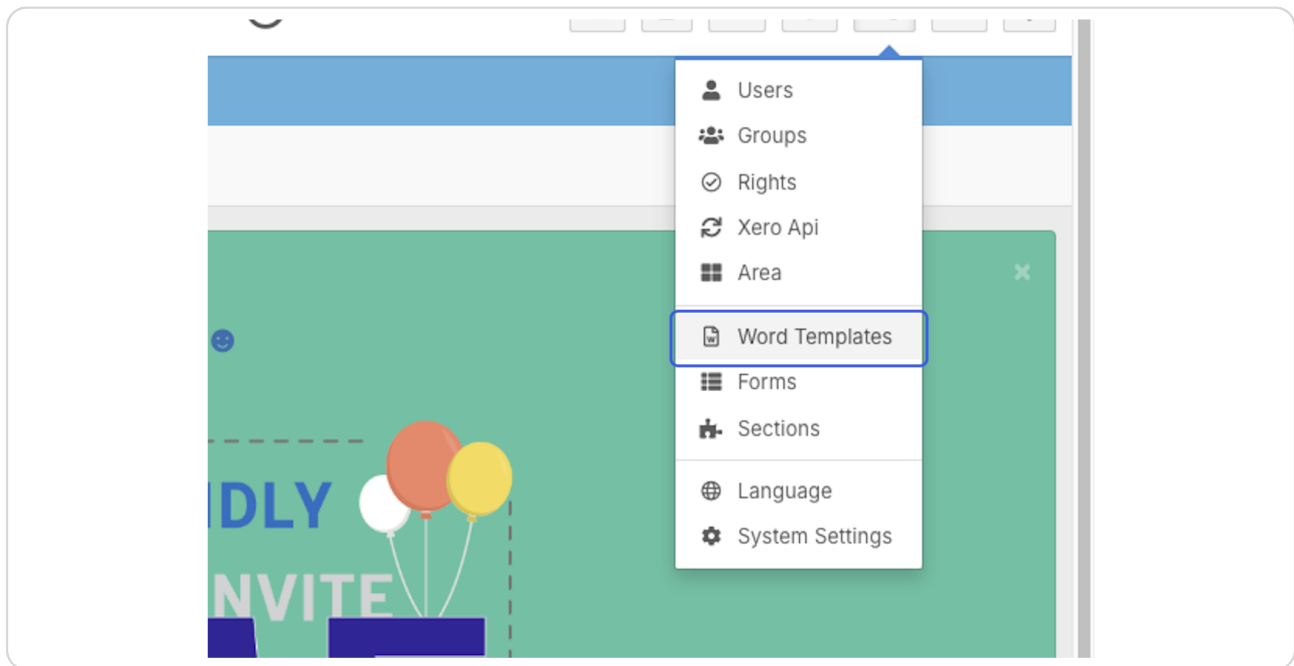
## STEP 12

### Click on System Menu



## STEP 13

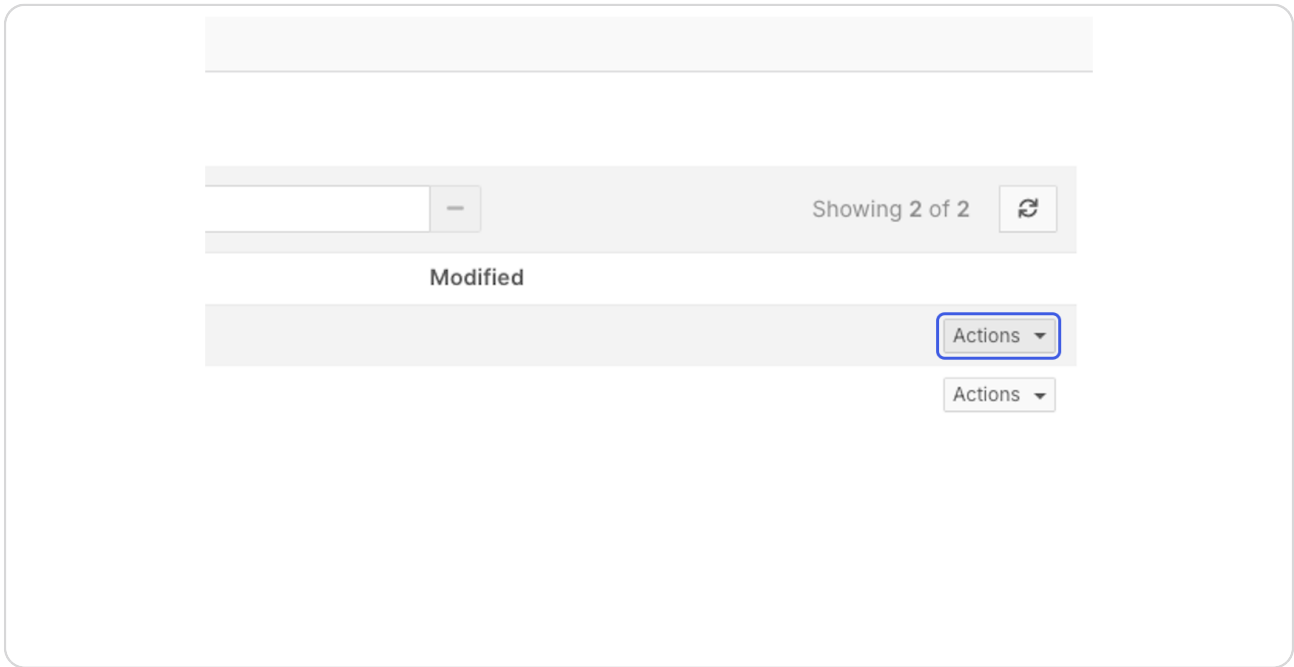
### Click on Word Templates





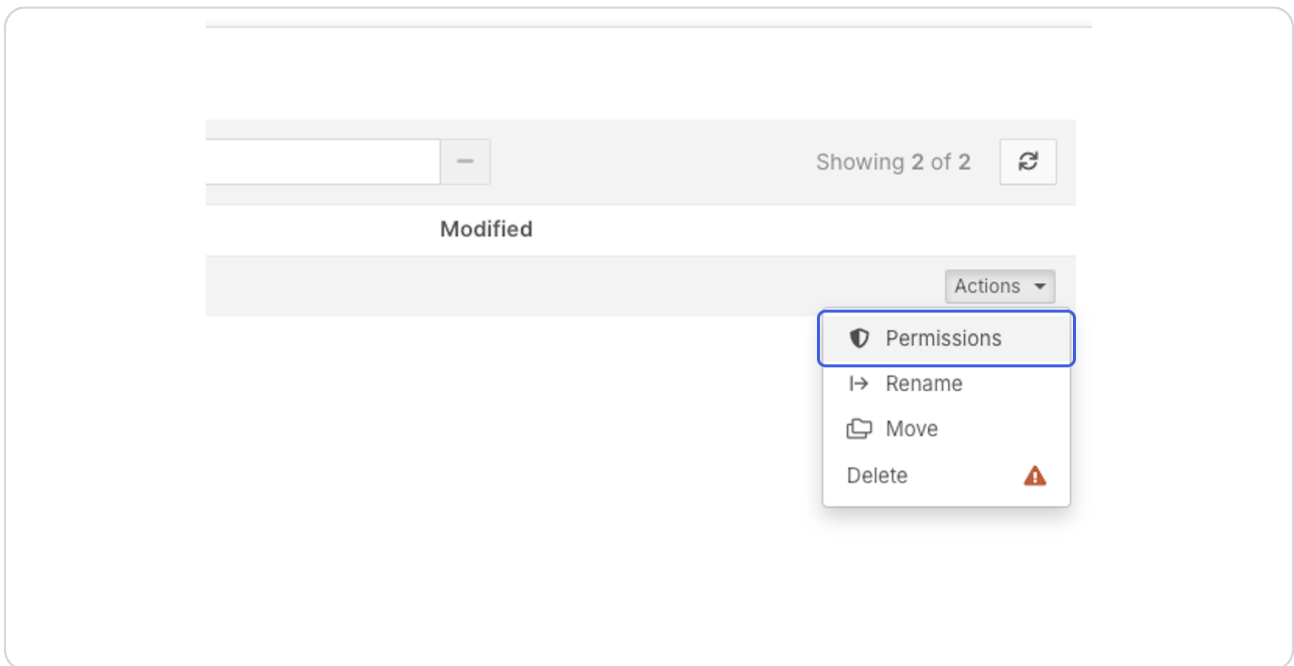
## STEP 14

### Click on Actions



## STEP 15

### Click on Permissions



## STEP 16

### Under Allow Access select the groups to have access to this folder.

After selecting a group you should see the label move across to the Selected column on the right hand side.

By simply Allowing access to one group the system will automatically prevent any user who is not apart of this group from seeing further information in the folder.

The screenshot displays the 'Manage Folder Access' interface in Flowlogic. The page title is 'Manage Folder Access' and the permissions are for '/ templates / Client Word Templates'. The interface is divided into two main sections: 'Allow Access' and 'Deny Access'. In the 'Allow Access' section, there are two columns: 'Available' (Showing all 16) and 'Selected' (Showing all 1). The 'Available' list includes 'Blah', 'Camerons', 'FINANCE ADMIN', 'Funding Access only sample', 'HR ADMIN', 'Management', and 'Mananotemplates'. The 'Selected' list contains 'FLOWLOGIC ADMIN'. A blue box highlights the 'Mananotemplates' group in the 'Available' list, and a double arrow icon indicates it has been moved to the 'Selected' column. The 'Deny Access' section shows 'Available' (Showing all 17) and 'Selected' (Empty list). The 'Available' list in the 'Deny Access' section includes 'Blah', 'Camerons', 'FINANCE ADMIN', 'FLOWLOGIC ADMIN', 'Funding Access only sample', 'HR ADMIN', and 'Mananotemplates'. The left sidebar contains a 'MAIN MENU' with various navigation options like 'Dashboard', 'Hazard ID Reporting', 'Jira', etc. The top navigation bar includes 'Flowlogic', a search bar, 'Clock ON', and 'Emergency' buttons.

## STEP 17

**\*Optional\*** Under Deny Access select any users to have no access to this folder in the future.

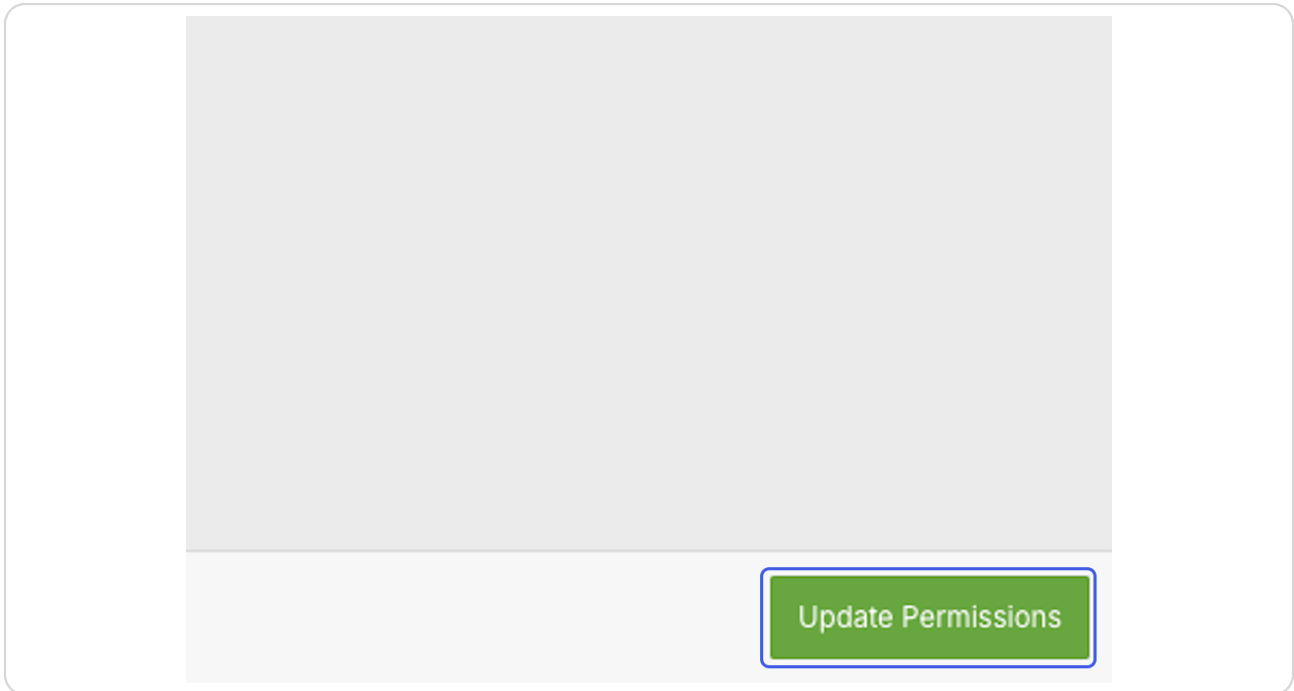
Deny rules should only be used if you have staff across multiple groups. For example if there is a user in FlowLogic Admin that also has access to Staff you can deny the staff group and they will be unable to see the folder.

The screenshot displays the FlowLogic Admin interface. On the left is a dark sidebar with a navigation menu including: Staff, Incident / Accident / Near miss, Property, Asset Register, Stakeholders, Feedback and Complaints, Training and Development, Communication Book, F.A.Q., Events, Notice Board, Achievements, Roster Schedule, Drive / Documents, Calendar, Reports, Business Intelligence, Automations, and Workflows. At the bottom of the sidebar, system information is visible: Powered by FlowLogic © 2022 Datanova, Revision: a027ba44c21a, UUID: 65366708-467621, DB: fig\_admin\_demo2 • Load: 0/18, Node: 30.02.222, Cluster: C.

The main content area is divided into two sections. The top section, titled "Deny Access", shows a list of 16 available users: Blah, Camerons, FINANCE ADMIN, FLOWLOGIC ADMIN, Funding Access only sample, HR ADMIN, and Management. A blue rectangular box highlights this list. To the right of this list is a "Selected" list containing only "FLOWLOGIC ADMIN".

## STEP 18

### Click on Update Permissions

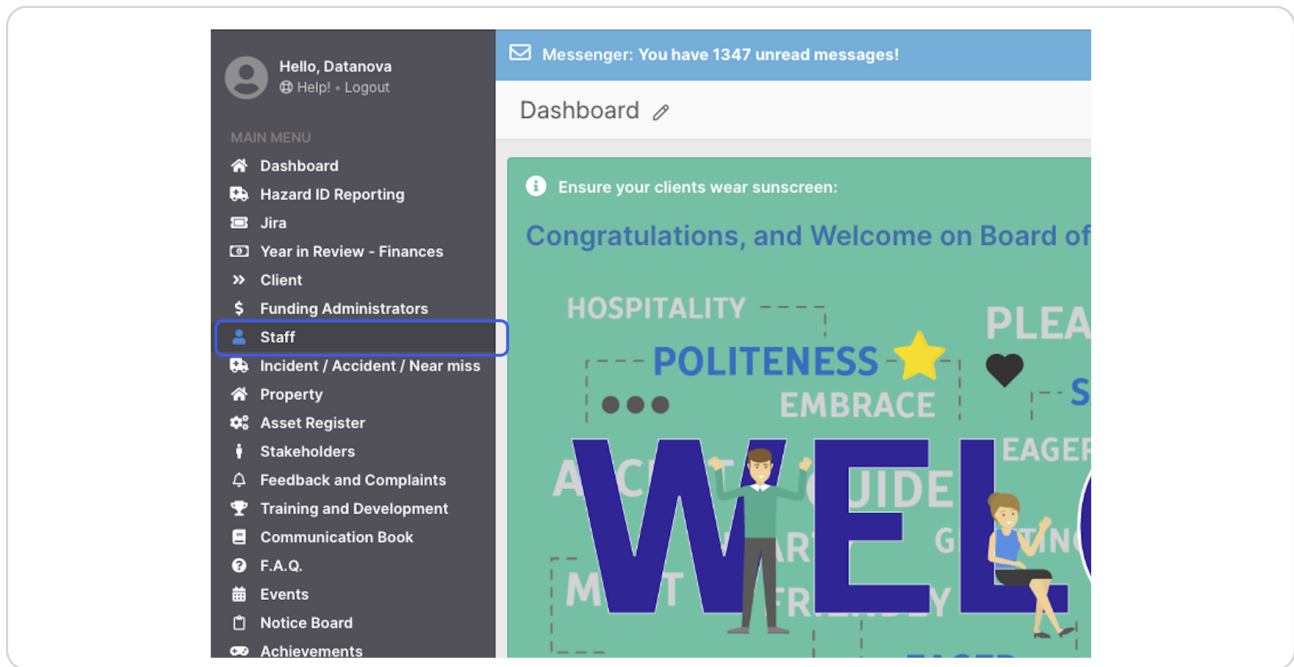


## How to Populate a document.

13 Steps

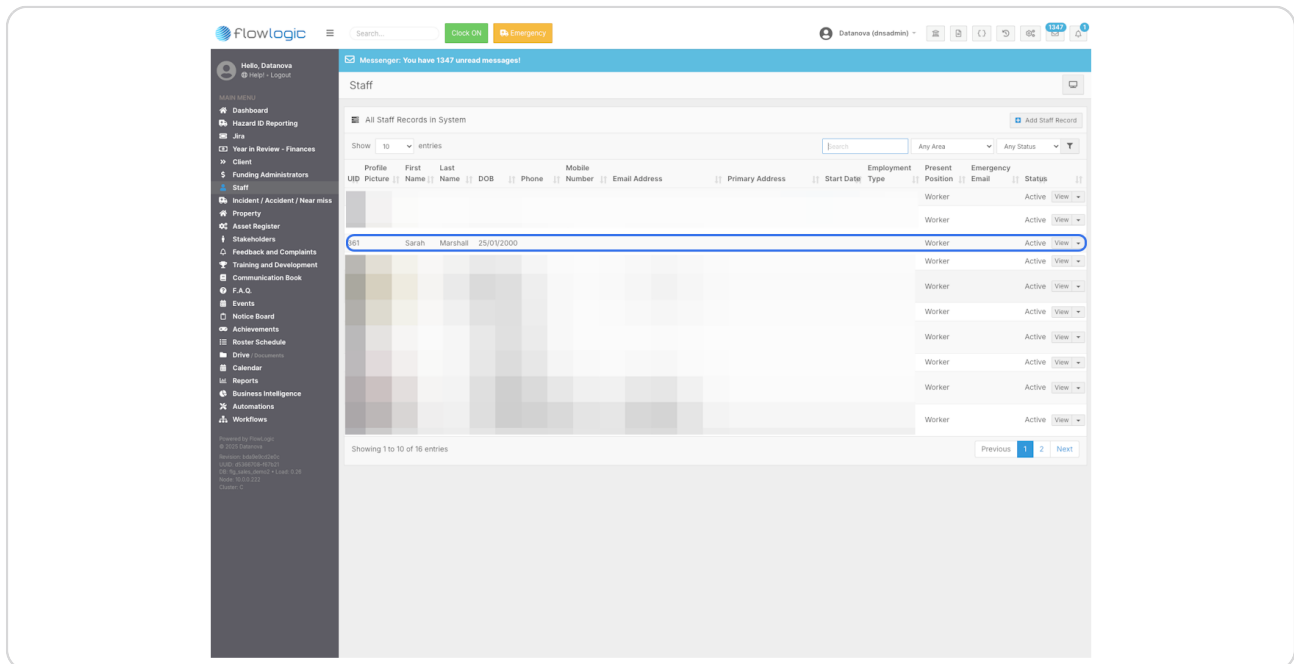
## STEP 19

### Click on Staff



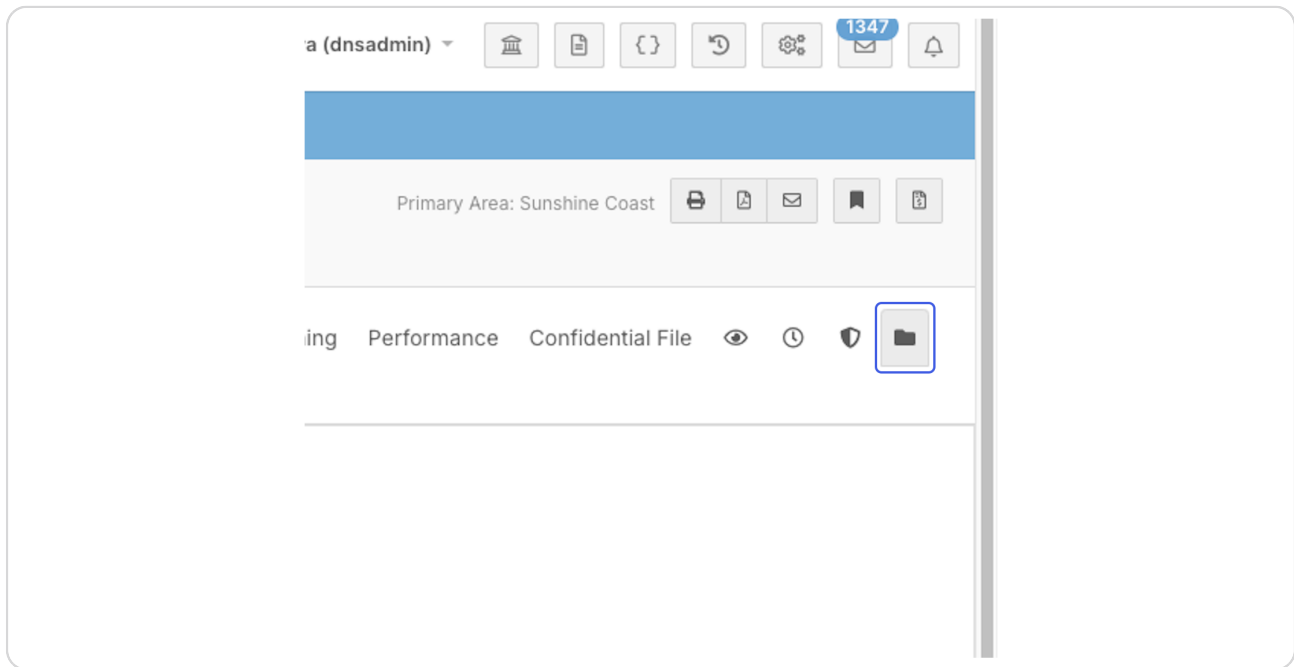
## STEP 20

### Click on the record that will be used in the template.



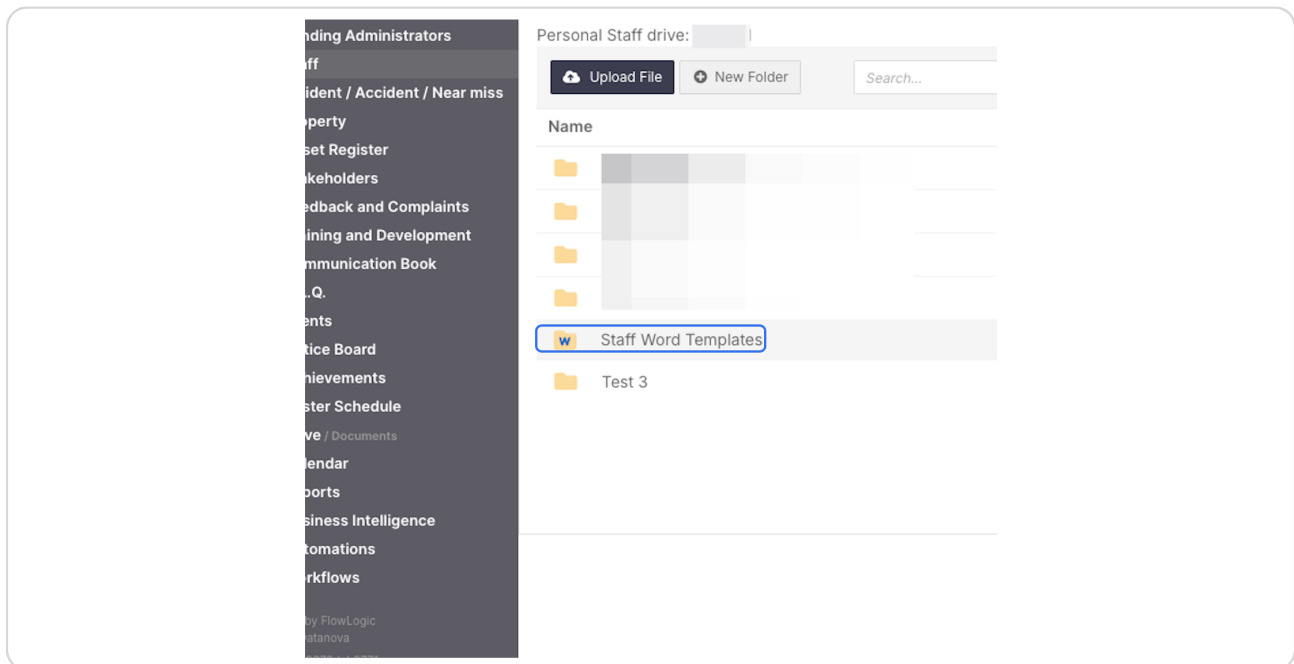
## STEP 21

### Click on highlight



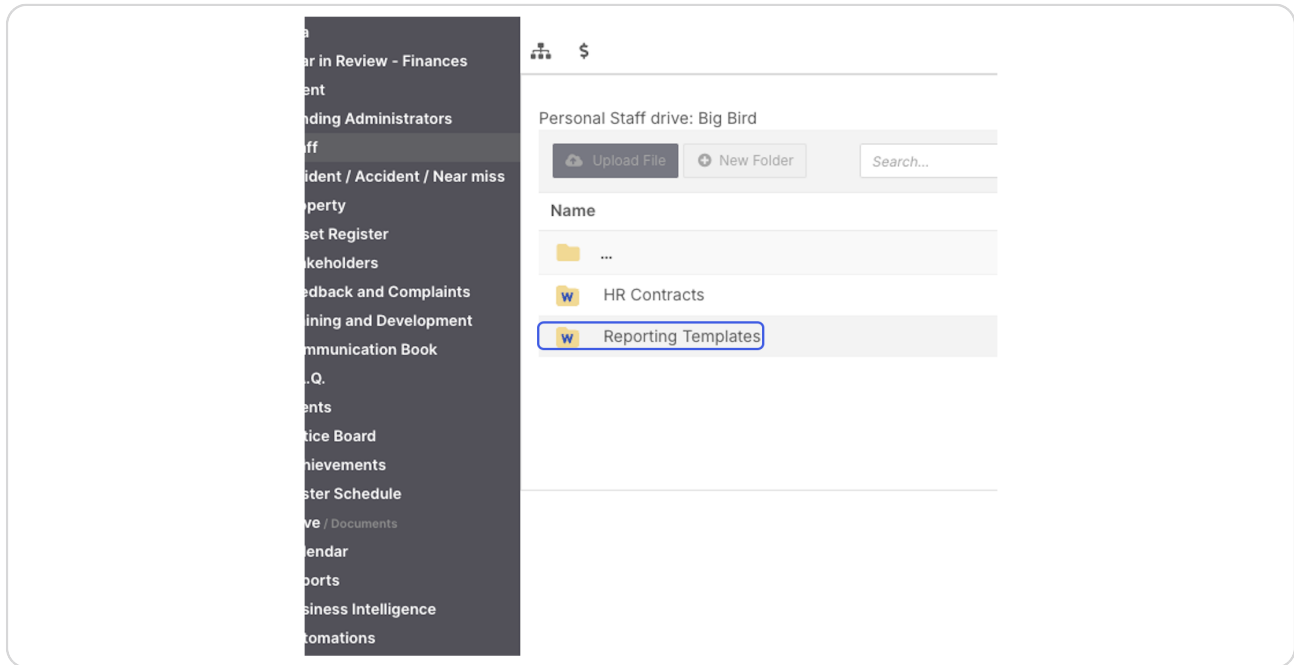
## STEP 22

### Click on Staff Word Templates



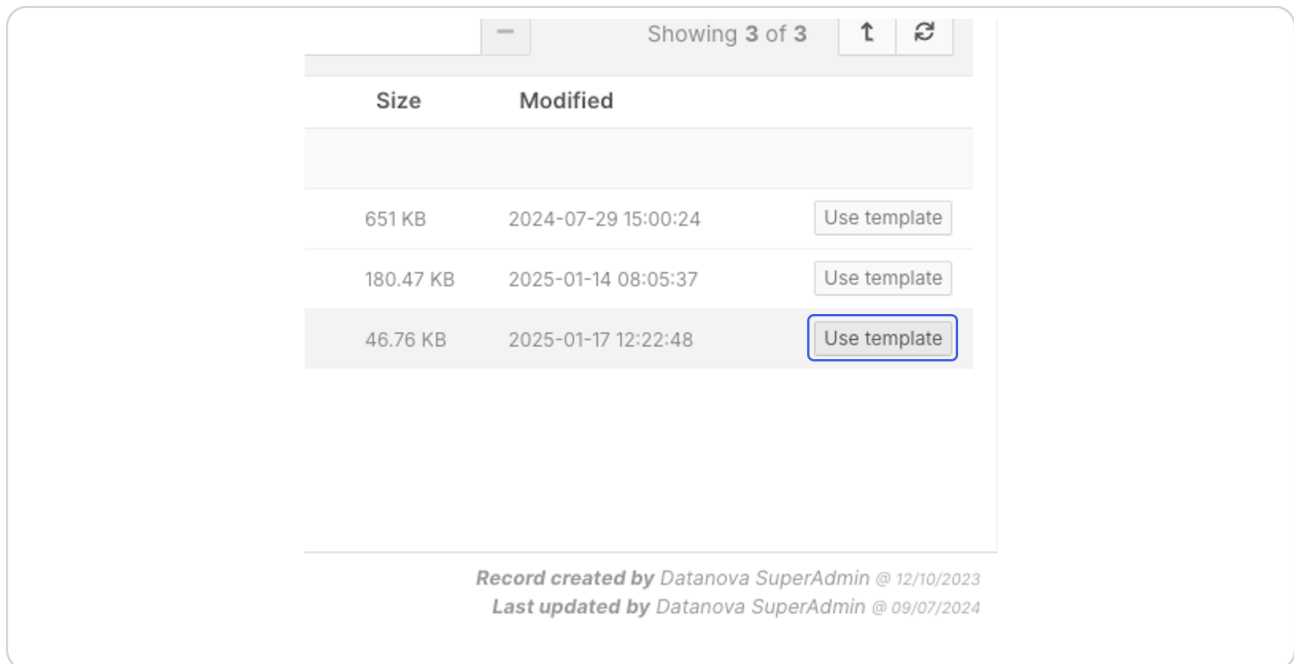
## STEP 23

### Click on Reporting Templates



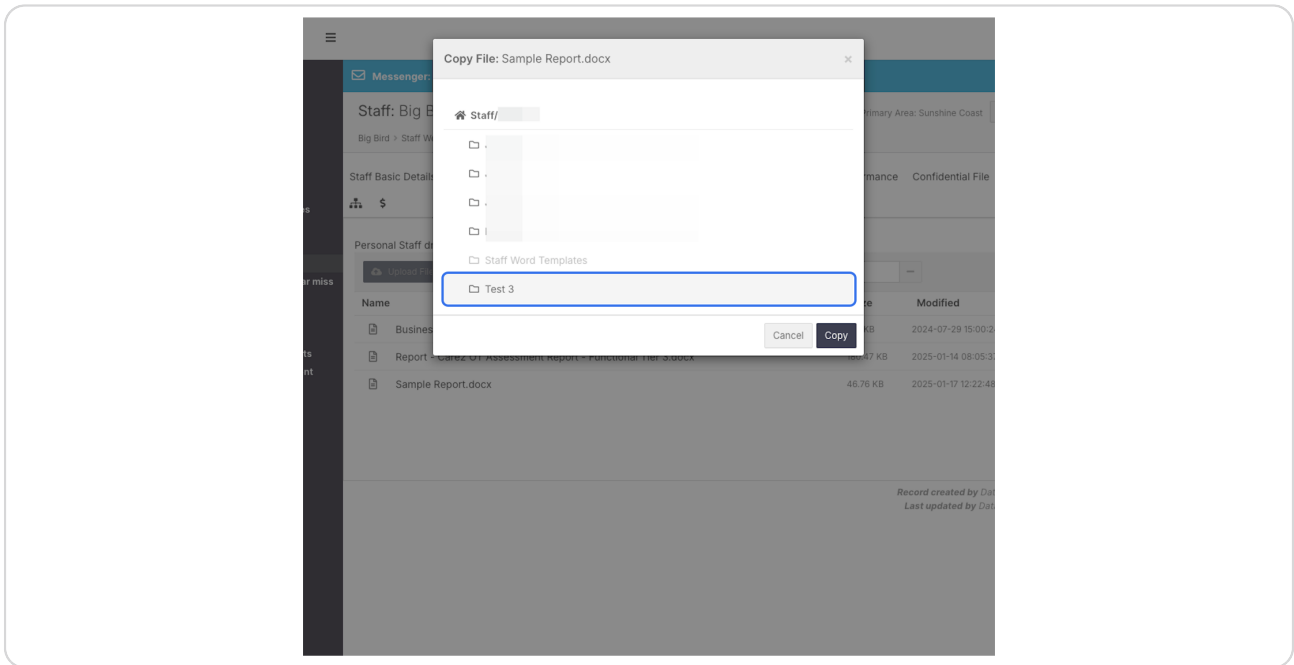
## STEP 24

### Click on Use template



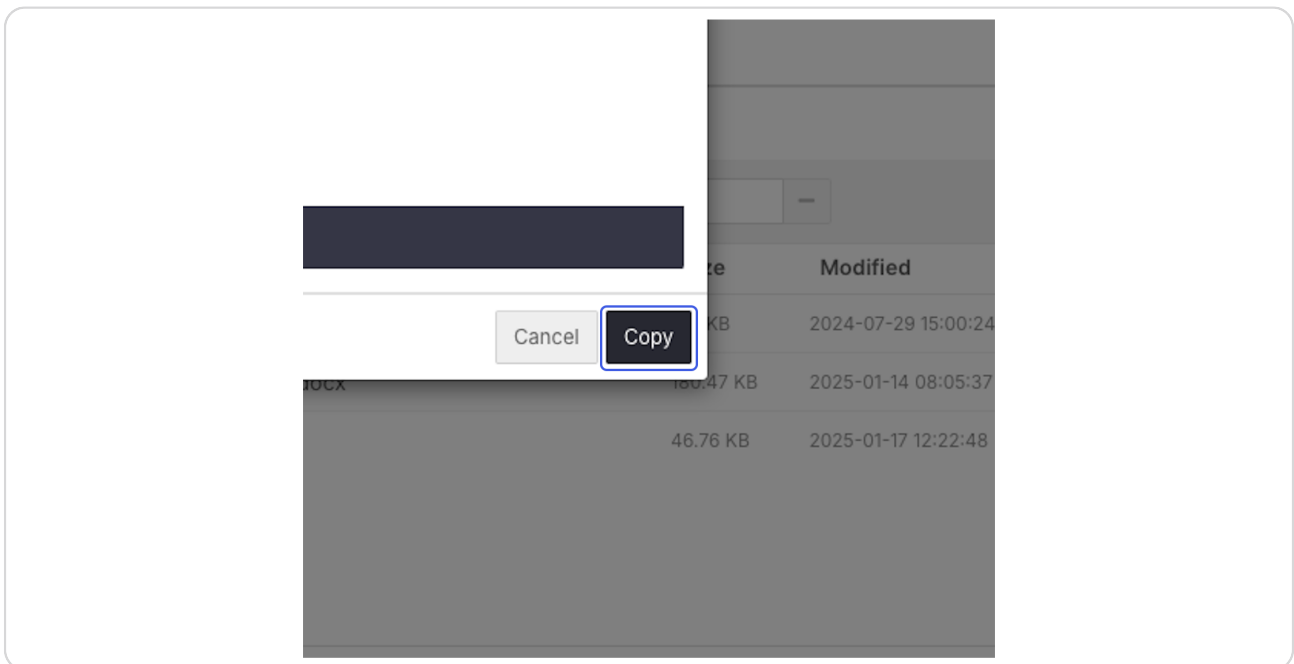
## STEP 25

### Nominate which folder will store the template on creation



## STEP 26

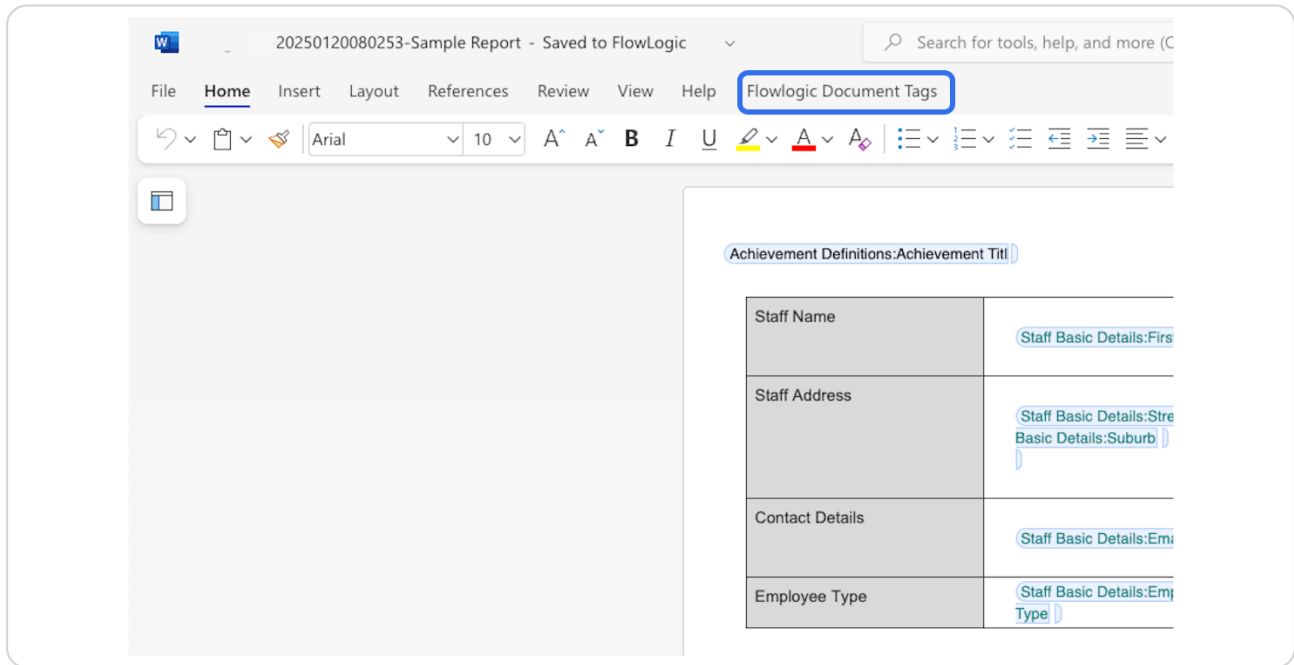
### Click on Copy





## STEP 27

### Click on FlowLogic Document Tags



20250120080253-Sample Report - Saved to FlowLogic

File Home Insert Layout References Review View Help **Flowlogic Document Tags**

Staff Name [Staff Basic Details:First](#)

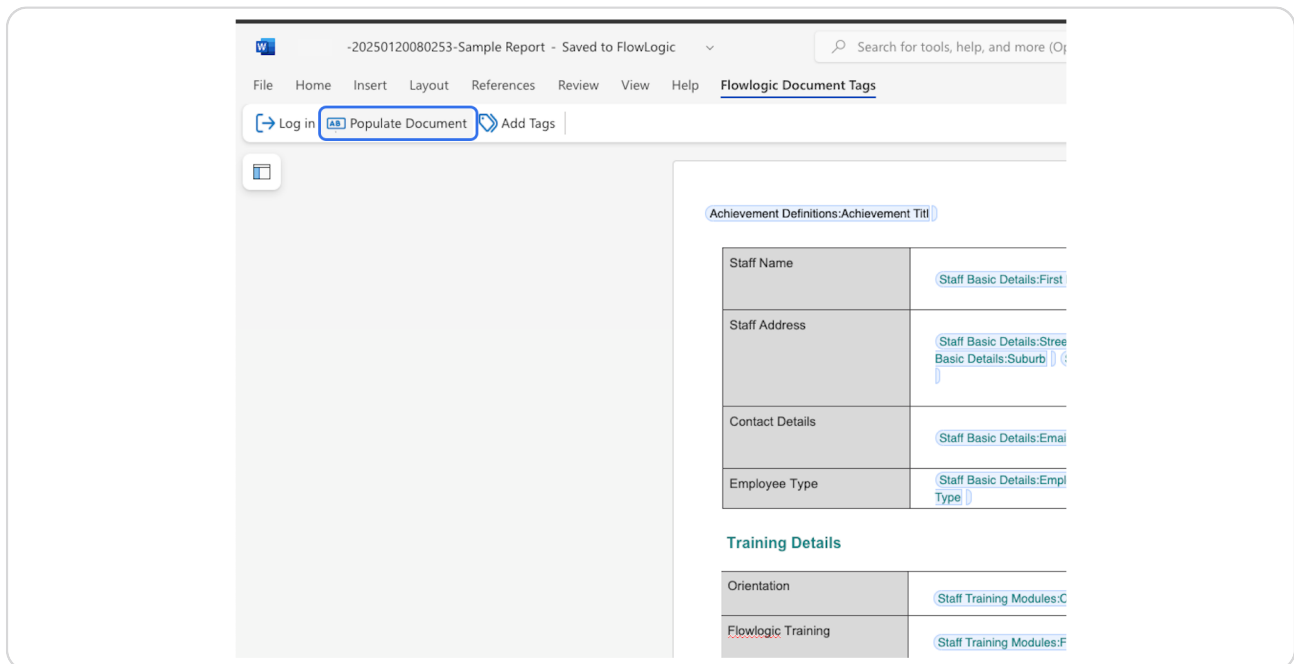
Staff Address [Staff Basic Details:Street](#)  
[Basic Details:Suburb](#)

Contact Details [Staff Basic Details:Email](#)

Employee Type [Staff Basic Details:Employee Type](#)

## STEP 28

### Click on Populate Document



20250120080253-Sample Report - Saved to FlowLogic

File Home Insert Layout References Review View Help **Flowlogic Document Tags**

Log in [Populate Document](#) Add Tags

Achievement Definitions: Achievement Title

Staff Name [Staff Basic Details:First](#)

Staff Address [Staff Basic Details:Street](#)  
[Basic Details:Suburb](#)

Contact Details [Staff Basic Details:Email](#)

Employee Type [Staff Basic Details:Employee Type](#)

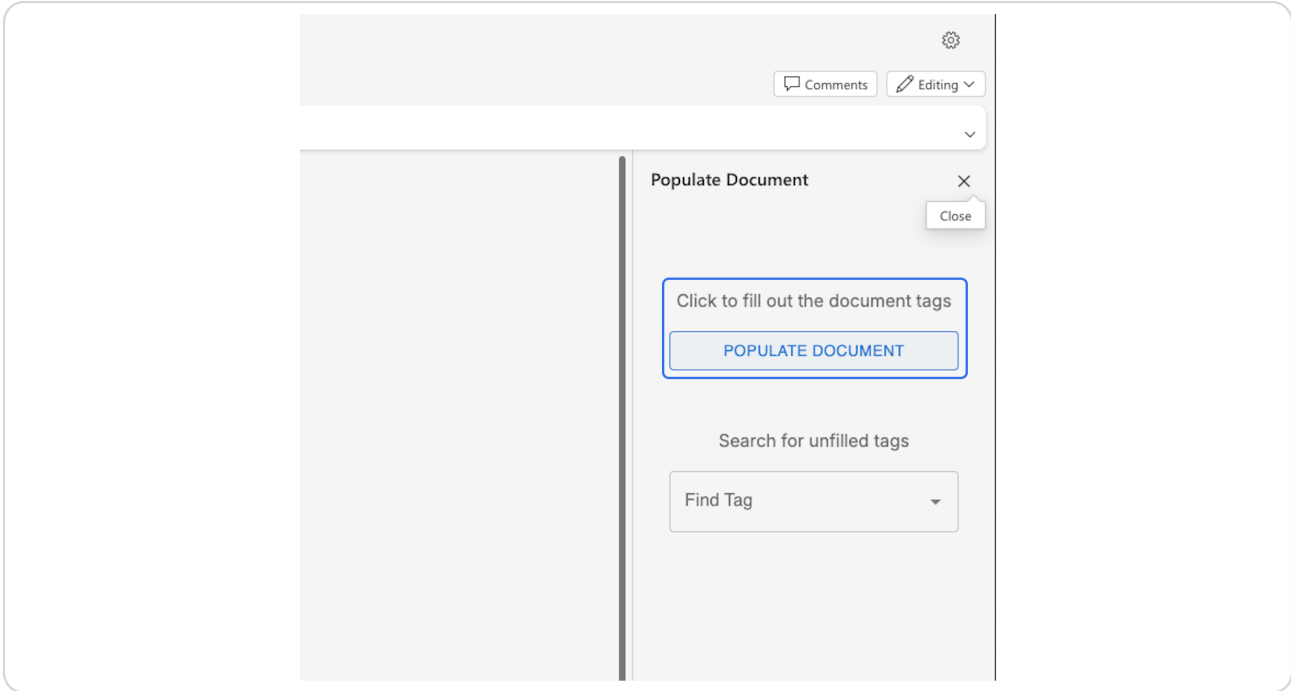
**Training Details**

Orientation [Staff Training Modules:Course](#)

Flowlogic Training [Staff Training Modules:Flowlogic Training](#)

STEP 29

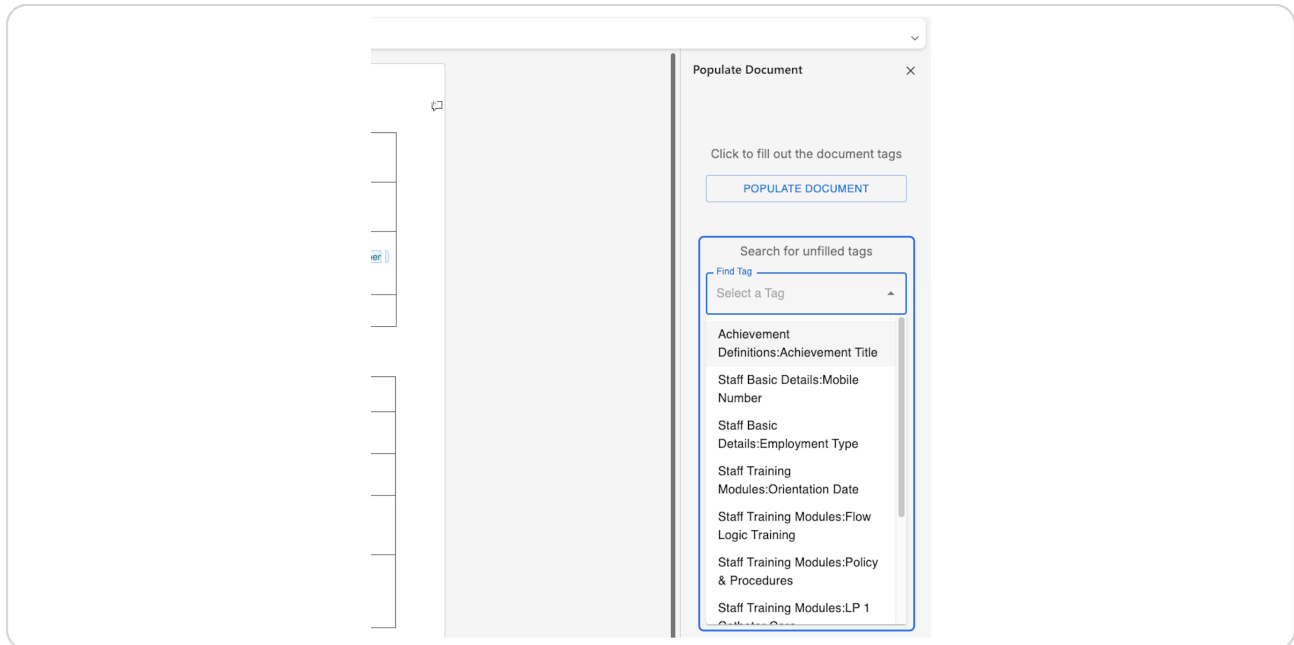
Click on Populate Document



## STEP 30

### **\*Optional\* Search for unfilled tags**

If the record doesn't contain specific information the system will display any missing data in the below shown dropdown list.



## STEP 31

### **Close the Tab and you're done**

