PlainSail Documents User Guide

Contents

Overview of PlainSail Documents

In PlainSail, documents are stored within PlainSail itself and does not use the folder structure in native Windows. This approach has the following advantages.

1) A document can belong to multiple entities at the same time.
2) Documents cannot be independently edited, moved or deleted outside of the PlainSail environment.
3) Documents have version control.
4) Users may make notes against documents.
5) Documents may be circulated for signature/approval.
6) Access to documents can be strictly controlled.
7) Standard documentation may be easily created from templates with all variable data completed.
8) Documents are readily available from multiple points within PlainSail.

Instead of using folders, PlainSail assigns documents to Entities and it also requires that a document must belong to at least one Workspace. Once a document is saved in PlainSail, any number of other Entities and Workspaces may be assigned to it.

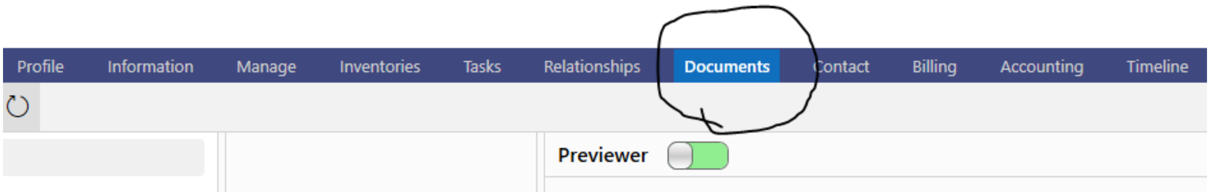
In addition, any document may be tagged with a label or labels in order to provide further categorisation to ease future retrieval.

When a document is stored in PlainSail, you should assign it with a meaningful and comprehensive name so that it can be easily retrieved and searched for.

You can access documentation either directly from within an entity you are working on, or via the 'Documents' option on the left side bar if you want more generalised access.

Access via an Entity

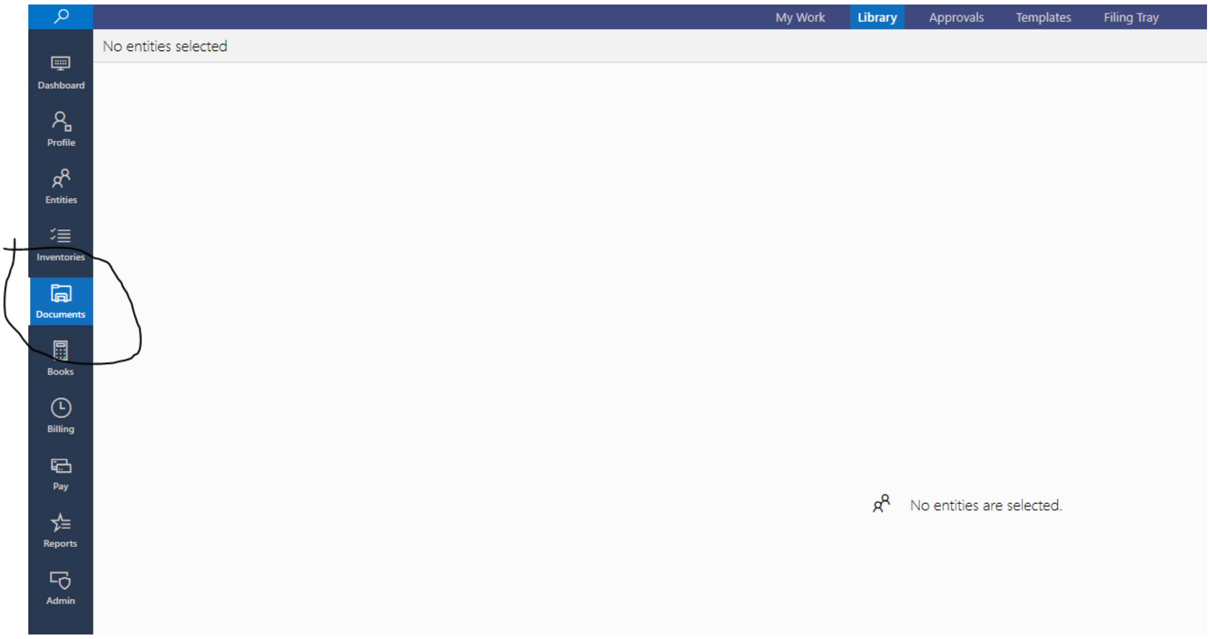
When you are working on a specific entity you can click on the '**Documents'** menu option at the top of the screen:



Please see [Viewing Documents]() for an overview of this.

Access via the Sidebar

Alternatively, you can use the 'Documents' button on the sidebar to launch a generalised version of the documents window. Using this window, it is possible to view the documentation across any number of entities.



Note that the menu choices at the top of the screen are somewhat different than when accessing via an entity, although the Library option will display the same screen once you have chosen the entities to include.

Any document type can be stored in PlainSail and most of the common types of documents are supported by PlainSail's previewer. You may read documents using the previewer only or you can open the document to view only. See Viewing documents.

However, if you wish to edit the document, the document is 'checked out' of the library and is unavailable for editing by other users until it is 'checked-in' again. For this reason, it is good practice to ensure that documents are checked back in as soon as possible. See the section Quickest way to check in documents for more information on this.

In addition, the 'Dashboard' screen also has a widget to show you documents that you have checked out and any 'Signing' that has been assigned to you.

When a document has been edited and checked back in, it creates a newer version and the older version is visible in the 'View Previous Versions' tab in the multi-purpose details pane. See the section Versions for more information.

Workspaces are an important feature in PlainSail, and they are divided into Client workspaces and (in red) and Internal workspaces (in blue). Client workspaces are the set of documents that form the company (or Trust etc) record whilst Internal workspaces are for documents accumulated by the managing company about the client entity. For example, a CDD document is the record of due diligence performed by the managing company ***about*** the client company. This does not actually form part of the company record itself but is information tied to the client entity.

Another Internal workspace is called 'Editable' which is intended for documents in, say, Word format that are being drawn up by the managing entity. When it is circulated, signed and finalised, it can then be converted into a PDF (using **Right-Click -> Convert to PDF**) and stored in the company record; e.g. in the Documentation workspace.

Workspaces may be further refined using 'Labels', which may be tagged to the document to create a subcategory within the Workspace. See Tagging documents with labels for more detail.

Documents can be created from Document Templates which may be designed by you and several standard templates are pre-configured and delivered within PlainSail. In order to create new templates, you will require training to understand PlainSail's macro template language.

Documents that have been created may be circulated for approval prior to finalising them by using **Right-Click -> Circulate**. You will then choose the people who need to approve the document and they are informed that a document is awaiting their approval. When they approve (or reject) it, a permanent note is made against the document recording this decision. You can track the progress of this document and will be notified if any user rejects it.

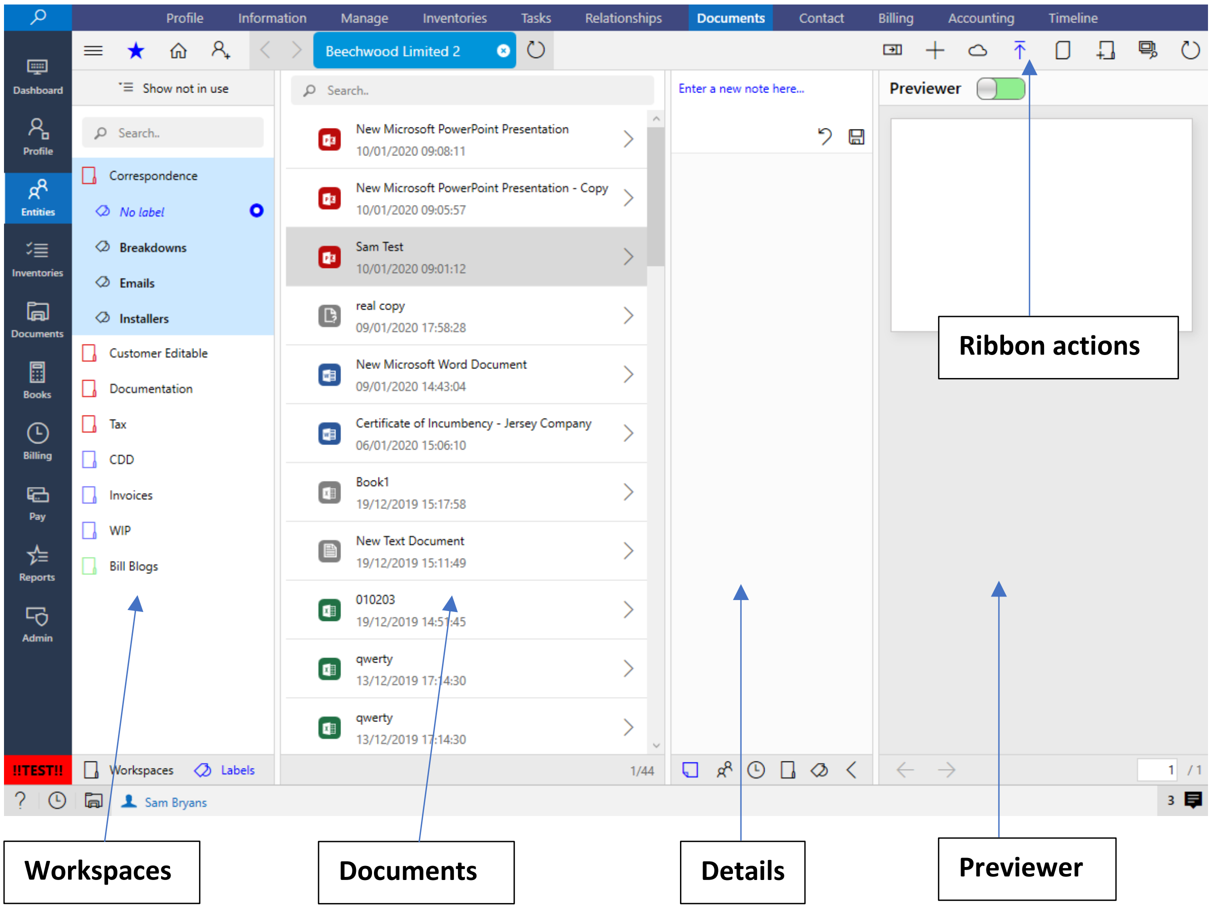
Every user has an individual Filing-tray, and this provides an area for you to temporarily scan and store documents prior to enrolling them to PlainSail. However, there are several other ways for you to bring documents into PlainSail. See Saving new documents into PlainSail.

Key things to remember

- When you store a document in PlainSail, that becomes the definitive version of the document. If the document originally existed in a Windows folder, the Windows folder version is no longer relevant or used and it will never be updated again when you edit the PlainSail version. For this reason, you may want to archive or delete the original version from Windows.
- PlainSail uses version control for all files and works on a Checkout/ Check-in basis for file edits. It is important that you remember to check back in a document when you have finished editing it. You always need to save the document in the program you are editing e.g. Excel, Word etc and close it before checking it back into PlainSail.
- Your document changes will not be visible to other users until you have checked the document back in.
- Ensure that each document added is given a meaningful and comprehensive name.
- If you want to share a document with several entities, do not copy it several times and save it under each entity. You only need one copy which you can link to several entities in the multi-purpose details pane under the View Related Entities tab.
- If you want a document in more than one Workspace, use the View Workspaces tab in the multi-purpose details pane to enrol it in other workspaces. Do not make another copy of it.
- Keep all developing 'Word' (or other editor) versions of documents in the Editable workspace. When you have finished use 'Convert to PDF' and save the fully finalised version in the relevant Client workspace.
- Use Labels to tag documents to further group them within workspaces.
- Documents may be circulated for approval prior to finalising.
- Remember to check the 'Folder' tab on the bottom left of the PlainSail screens which can be clicked at any time to reveal your checked-out documents.
- Also keep an eye on your Dashboard and ensure it is configured with the Documents widget.

Viewing documents

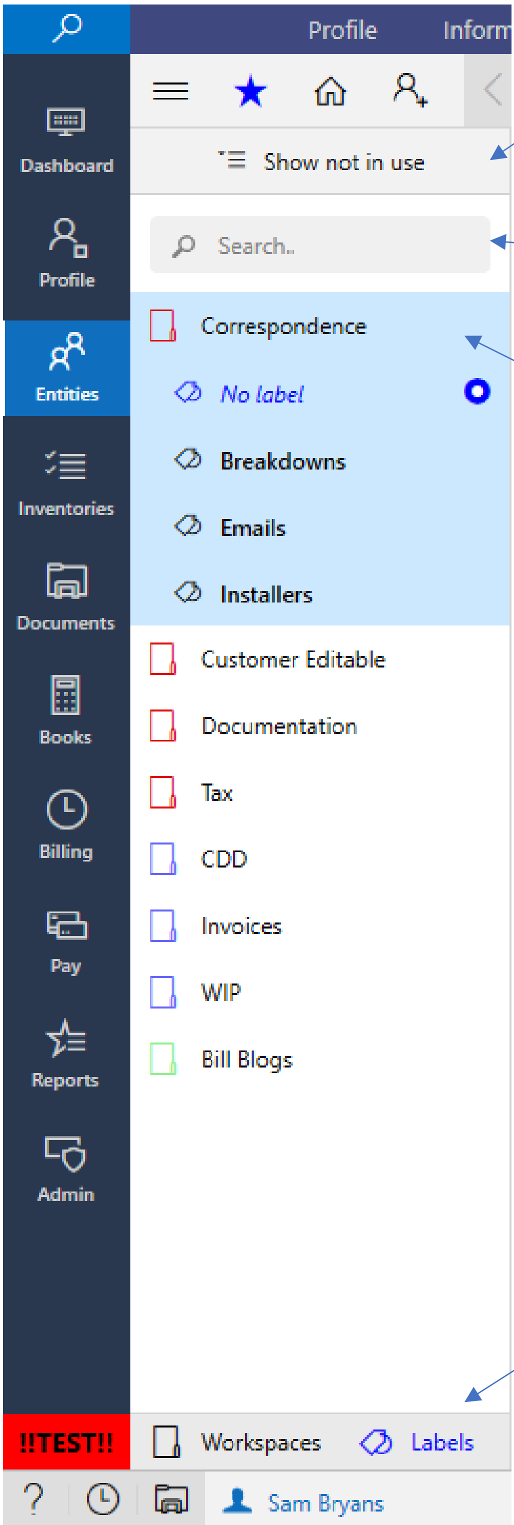
To view the documents for a single client, navigate to **Entities -> Documents**. Select a client and the following screen will be displayed:



The screen comprises of the above four panels and ribbon actions each of which will be explained below.

Workspace panel

Each entity within PlainSail has the same workspaces available. These have been defined by your organisation and can be modified by an IT administrator. All documents must be saved in at least one Workspace.



'Show not in use' / 'Hide not in use'. Not all Workspaces will have documents within them, this button allows you to hide any empty workspaces for the client you are viewing.

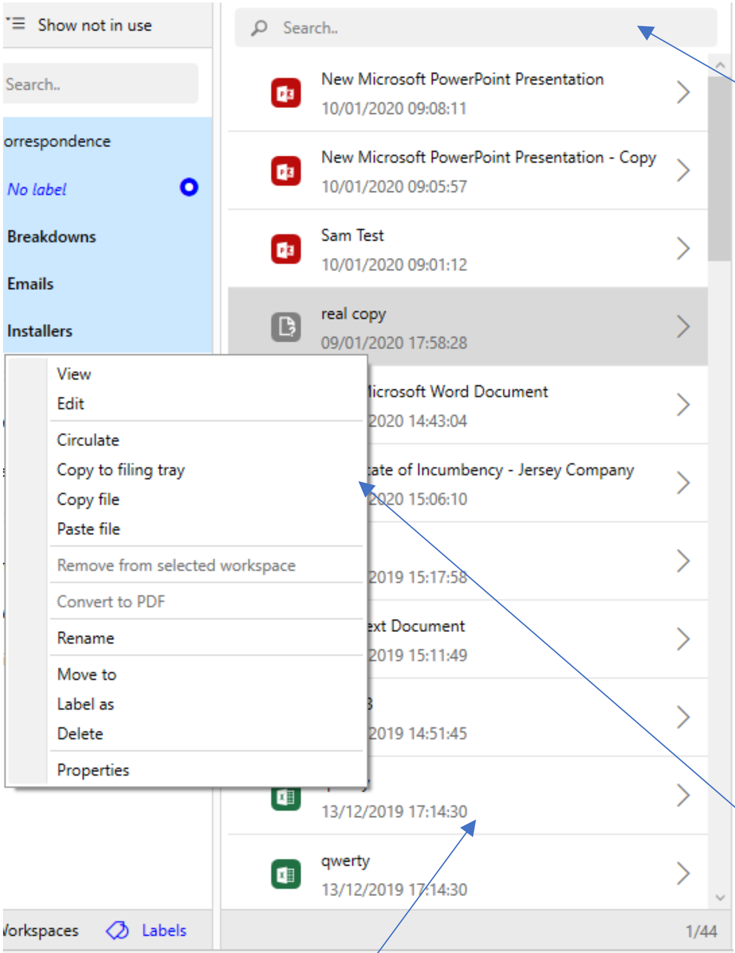
Search – this search bar allows you to search for a Workspace name.

Selecting a Workspace – to select a Workspace click anywhere on the name.

PlainSail has two options when viewing Workspaces. '**Workspaces'** or '**Labels'**. Labels allow you to subcategorise any document within a workspace. Click either icon to switch between.

Labels are described in more detail in the section Tagging documents with labels.

Documents panel



Search – entering a search will filter the documents listed within the selected Workspace. If you need to do a global search see How to search for a document across all clients

Right Click – you can right click on a document or selection of documents which will display the following options:

*View***:** view a read-only copy of the document.

Edit: check the document out if you wish to make changes to it.

Copy file: use this option if you wish to copy the file. You can then paste it into Windows Explorer or an email.

Convert to PDF: if you have a Word document selected, you can use this to convert it to a PDF (the original Word version will be retained).

Rename: change the name of a file or multiple files.

Move to: move a document/(s) within PlainSail to a different client or Workspace.

Label as: see section Tagging documents with labels.

Delete: delete the selected documents.

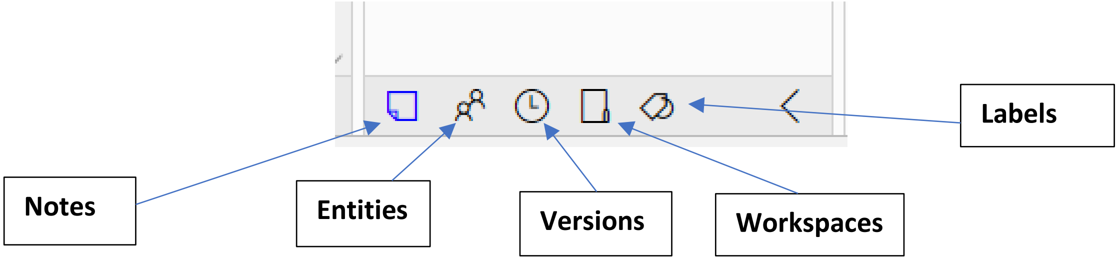
Properties: display all properties e.g. who created the document

Double click – double click on any document to display associated options (see Checking out a document).

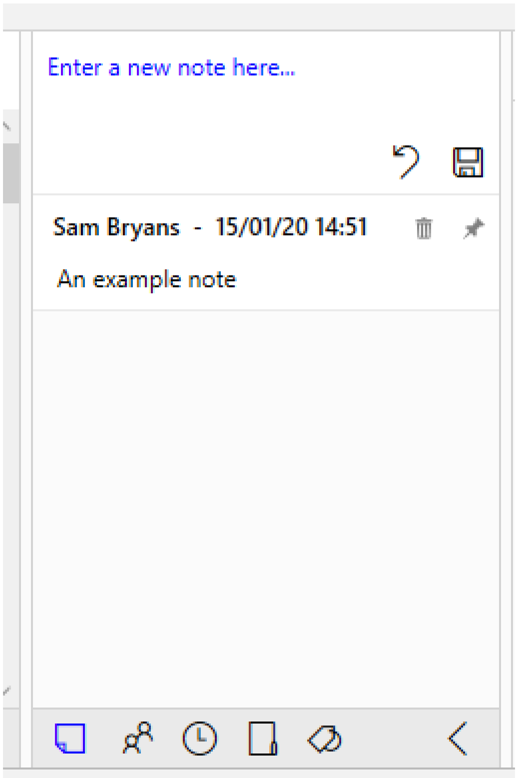
Alt + Double click – to open a document as read-only (you do not wish to make any changes) hold down alt and double click.

Details panel

Once you have selected a document the middle panel will become visible and will display the following icons. Click these to view different information associated with the selected document. These are explained below.

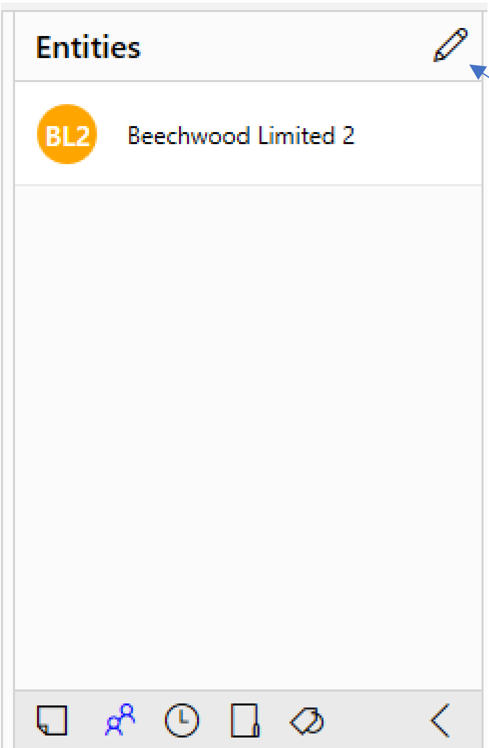


Notes



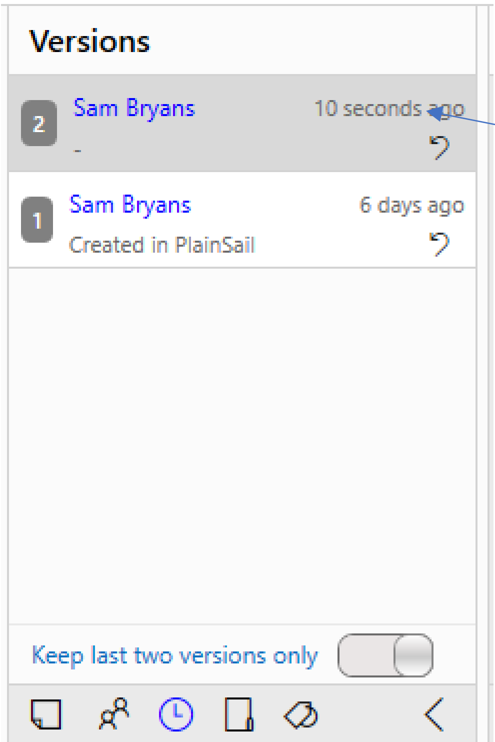
The notes menu displays any notes associated with the document. To enter a new note simply type and click the save icon. **These notes are only visible to people within your organisation and will not be displayed if you send the file externally.**

Entities



The entities menu displays all entities that are connected to this document. Click the **Edit** icon if you wish to change this. If a document relates to more than one entity both should be selected, e.g. an agreement between two parties that are both setup as entities on PlainSail.

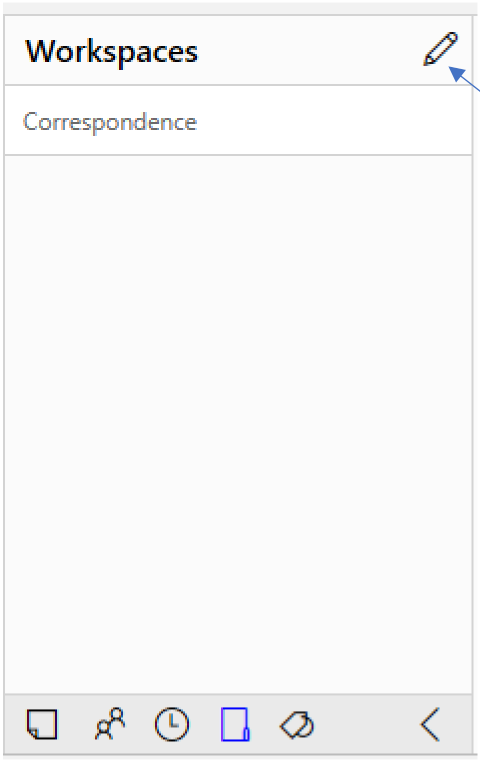
Versions



Versions display all versions of the document available within PlainSail (each time a user checks out and checks in a document a new version is created). You can click on a historic version to preview it or rollback to it.

Keep last two versions only – if a document is edited frequently this option can be selected to save space. You will also be prompted to set this when you check in a document that has more than 2 versions.

Workspaces



Workspaces – this will list all Workspaces connected to the document. Click the edit icon if you wish to change the workspaces.

Labels

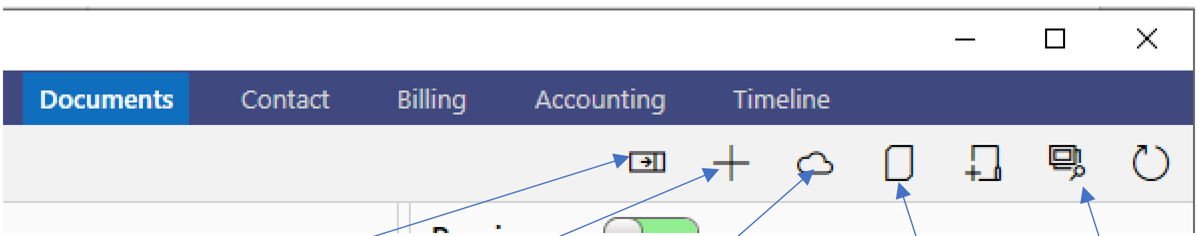
This section is described in section [Tagging documents with labels](#).

Preview panel

The preview panel displays a preview of the selected documents. If the document's format is not supported by the PlainSail previewer, please contact us and we will see if there is another previewer available. To view an unsupported document, right click on the document and click View, which will try and open it using the default program on your computer.

Ribbon actions

Key ribbon actions are described below.



Collapse preview pane – use this if you wish to collapse the preview pane and just show a list of documents.

+ Create Document – use this if you wish to create a new document (Word, Excel, PowerPoint, Text File)

Upload document – use this button to save a document to the current client you are on. This will default to your filing tray

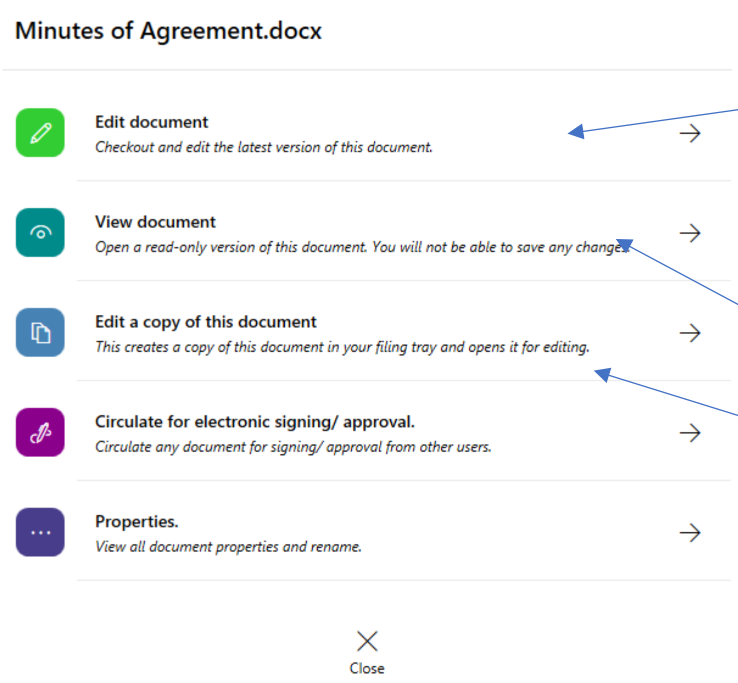
Launch template – use this button to launch standard templates e.g. Minutes.

Search – use this to search for a document across all Workspaces.

Editing documents already saved in PlainSail

Checking out a document

Double clicking a document will bring up the following options. These are explained below:



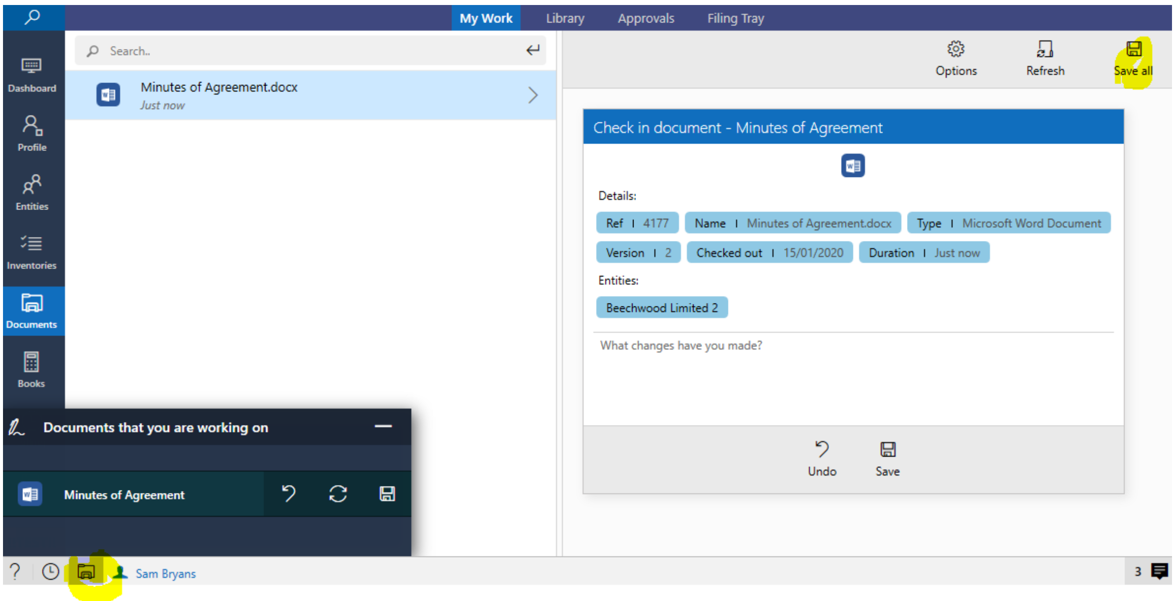
Edit document – click this to check the document out and edit it. Other users will not be able to edit this document until you have checked it back in. *See - **Checking in a document** for when you have finished editing. *

View document – click this if you just wish to view the document, but do not wish to make any changes.

Edit a copy of this document – click this if you wish to use this document as the basis for a new one. For example, if you wish to create some minutes which are very similar, this will create a copy for you to edit and save as a different name.

Checking in a document

There are two ways to check documents in. You can either click the bottom bar document icon, this is available on any screen within PlainSail. Alternatively, navigate to **Documents -> My Work**, this will list all documents you have currently checked out. You can either click 'Save' on each one and optionally enter a comment of any changes you have made. Or alternatively you can click 'Save all' to check all documents back into PlainSail.

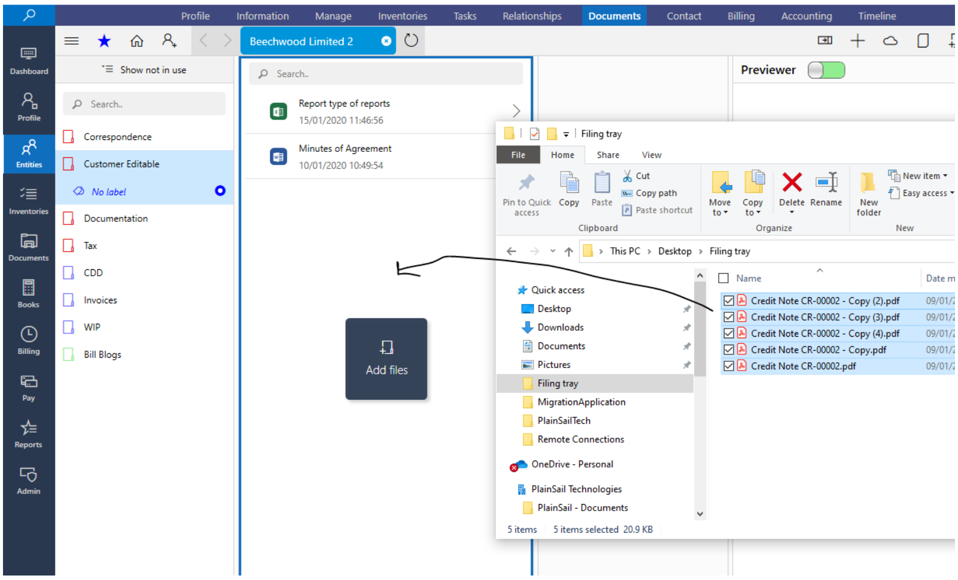


Saving new documents into PlainSail

There are various ways to save a new document into PlainSail, the below sections highlight the common areas.

From Windows Explorer

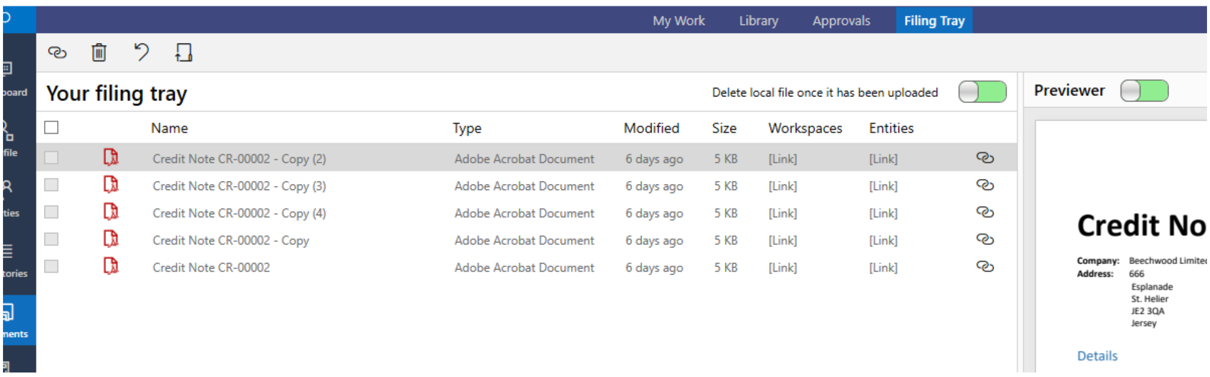
To save straight from Windows Explorer you can drag and drop files straight into PlainSail. You can either drop the files in the middle pane (if a Workspace is selected) or you can drop them straight into a Workspace. If you drop more than 10 files a confirmation screen will popup that you will need to click **'Save'** on.



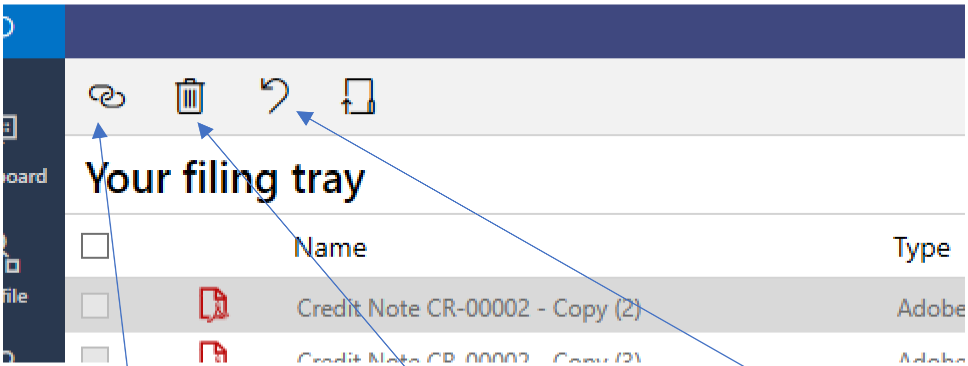
Note that when you save a file to PlainSail from Windows, the original Windows file is no longer relevant and there is no link between the PlainSail file and the Windows one. You should archive or delete the original Windows file so that you do not inadvertently edit it again.

From your filing tray

Any documents scanned to your filing tray will appear in **Documents -> Filing Tray**, this screen is designed for bulk uploads into PlainSail. The screen will appear like this:



Filing tray ribbon actions

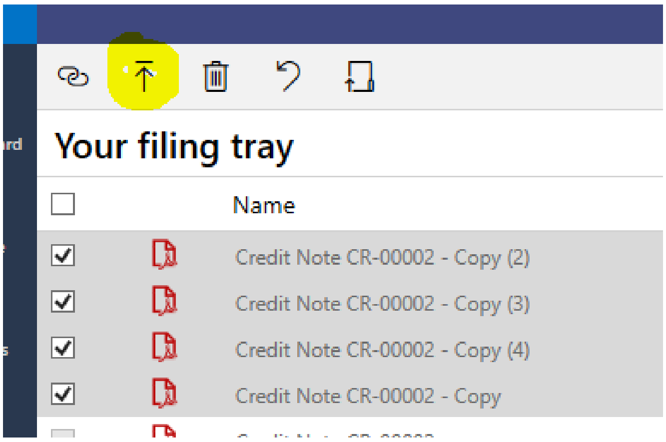


Link documents – click this to link the selected documents to a Client and Workspace. Please note you can do multiple documents in one go.

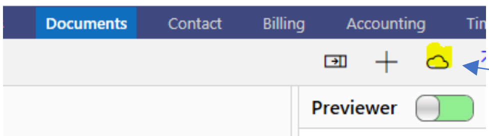
Delete documents – click this to delete documents from your filing tray that you have already saved into PlainSail.

Undo links– click this to undo any links you have made to a document.

Once you have linked documents to an entity and Workspace you can upload them into PlainSail. Tick the items you wish to upload and then click the below icon.



Within a client from your filing tray

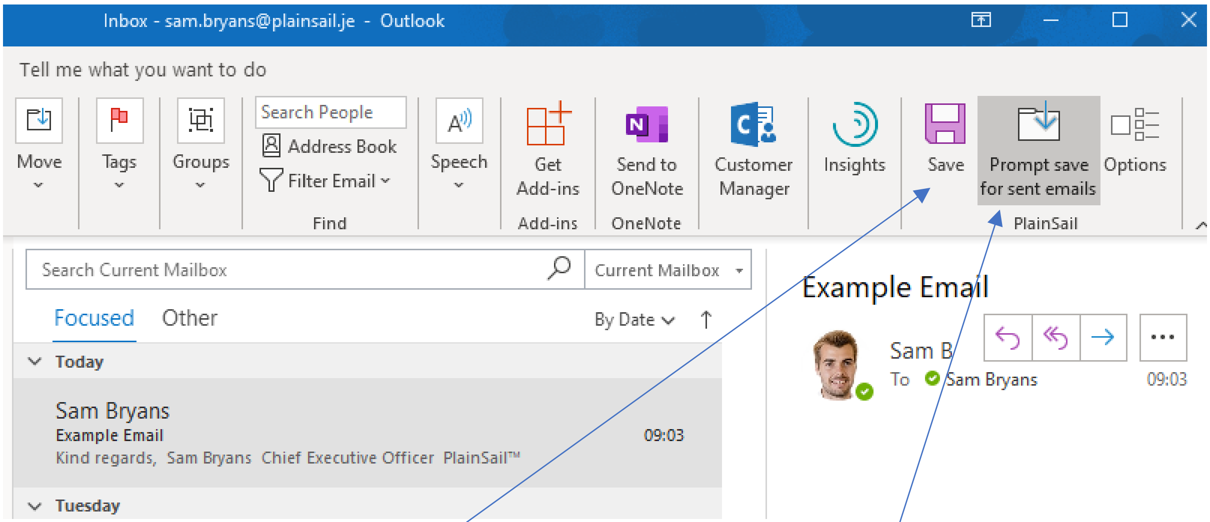


Upload– Click the cloud upload button within a client to add document to the current client from your filing tray or other windows folder.

From Microsoft Outlook

Note This function is only available if you have the PlainSail Outlook plugin installed on your computer.

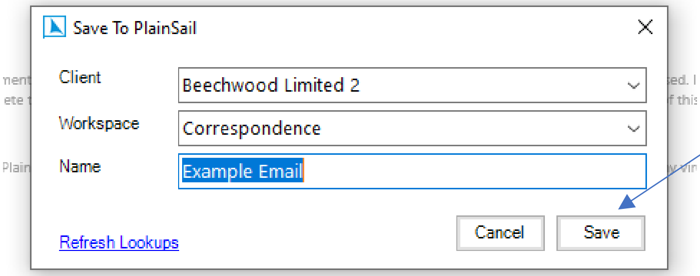
Within Microsoft Outlook you will see the following PlainSail menu on the ribbon:



Save– select an email and click 'Save' if you wish to save it to an entity within PlainSail.

Prompt save for sent emails– select this option if you wish for PlainSail to prompt you to save each email you send.

The following screen will be displayed:



Enter the Client, Workspace and Name (this will default to the subject and click **'Save'**

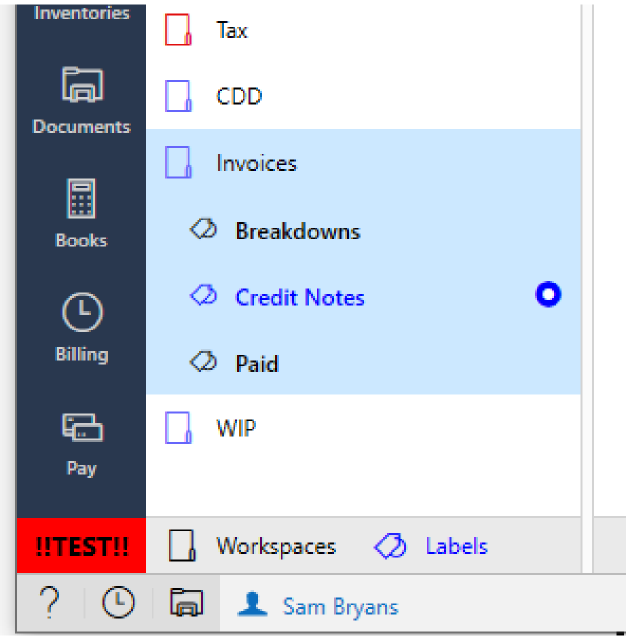
PLAINSAIL

Tagging documents with labels

All documents must be in at least one Workspace that has been defined by your organisation. You may wish however to sub categorise documents into specific categories for an entity e.g. “London Property Purchase”, “2020”, “2021” and so on. You can do this using labels and sublabels.

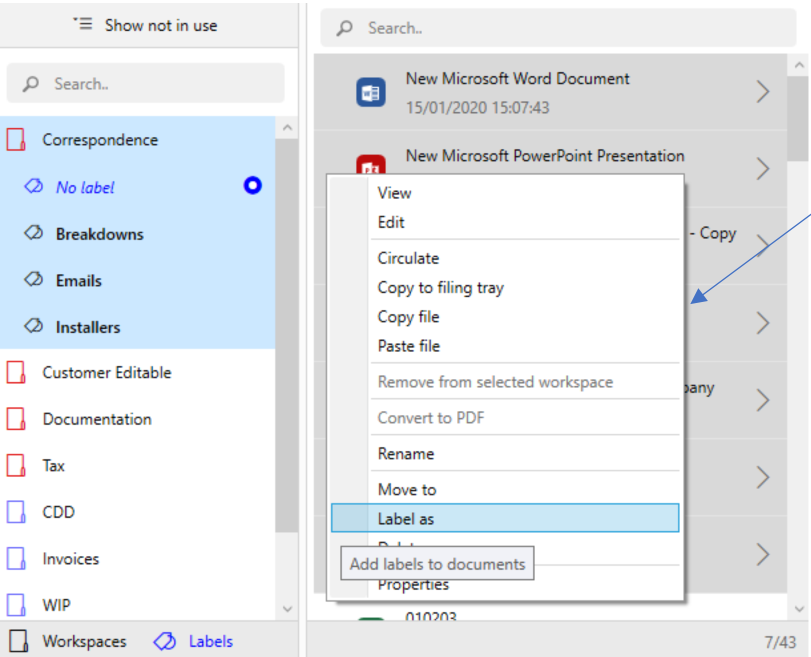
Viewing Labels

To make labels visible click ‘Labels’ on the Workspace sidebar:



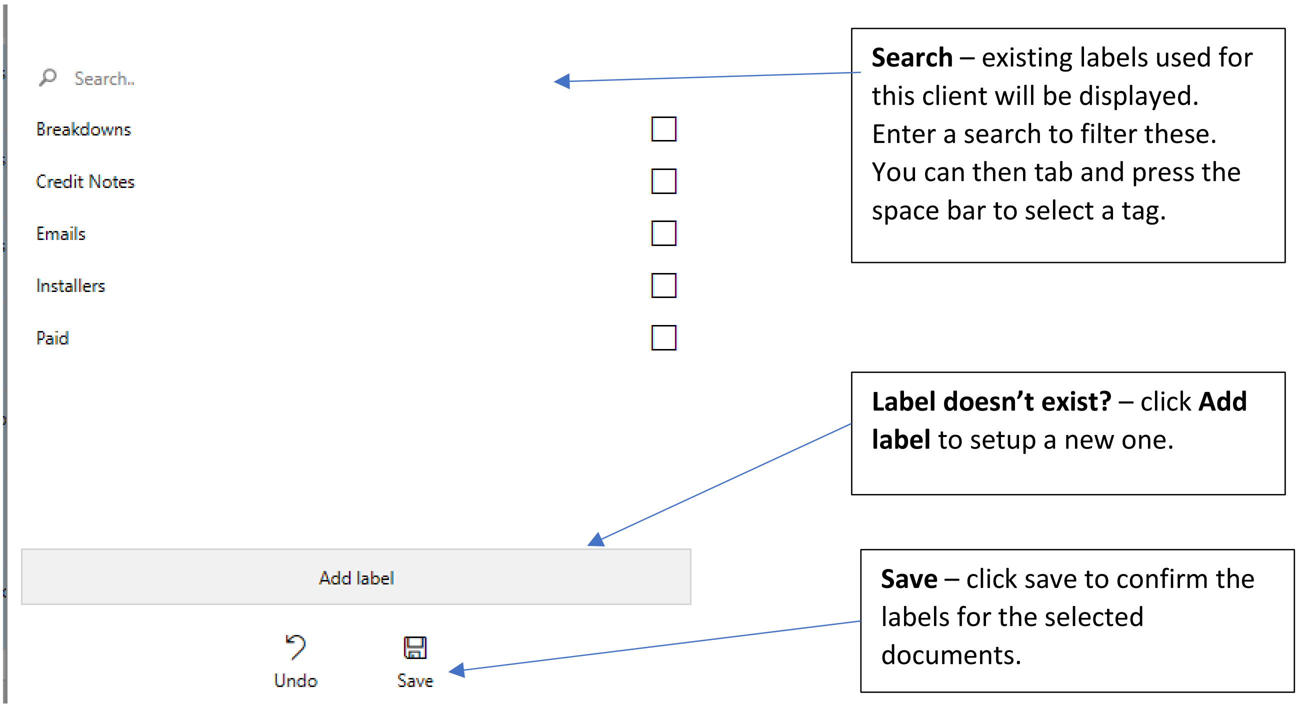
To select a label, click a Workspace and then select the underlying category, documents within this Workspace tagged with this label will then be listed.

Adding labels to documents



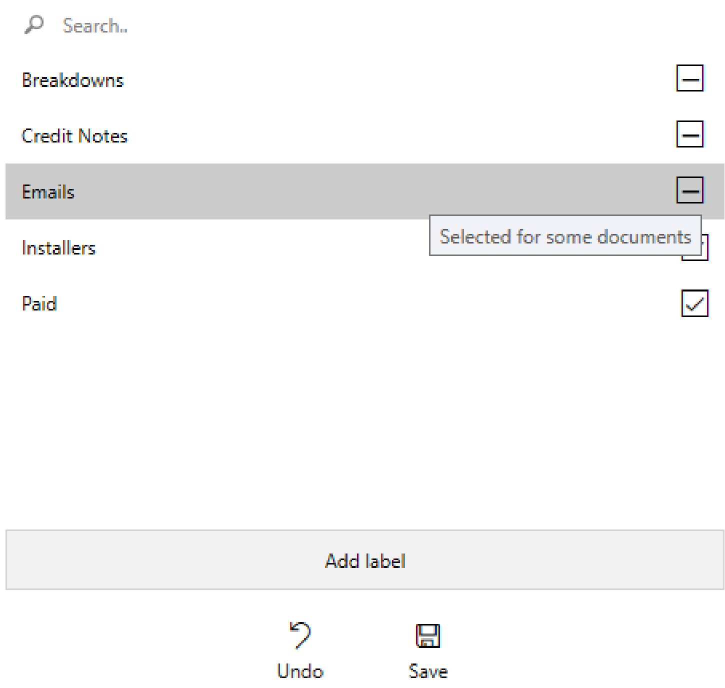
Right click on a selection of documents and click ‘Label as’

The following window will be displayed



Removing Labels from documents

To remove labels from documents, follow the exact same approach as adding a label. Select the documents and click **'Label as'.** This will bring up the same screen, you can then untick any labels you do not wish to be associated with the document.

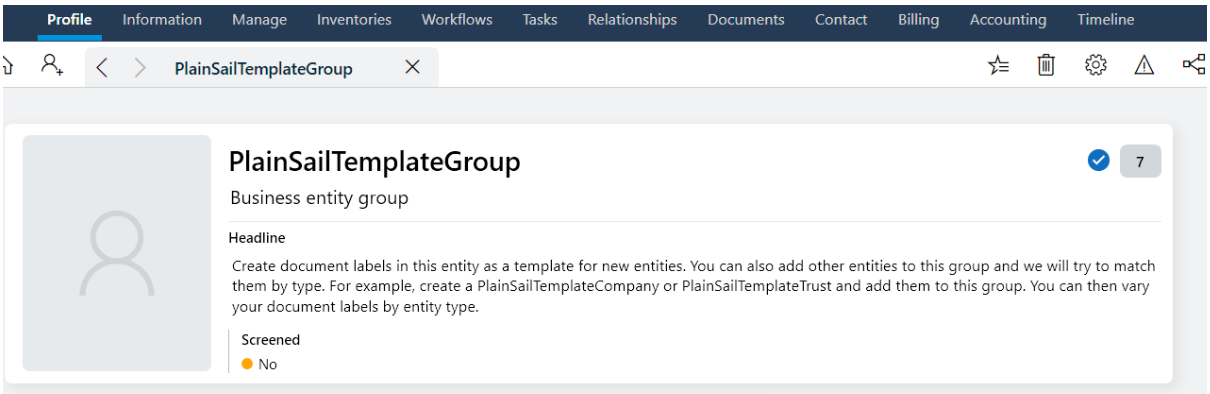


PLAINSAIL

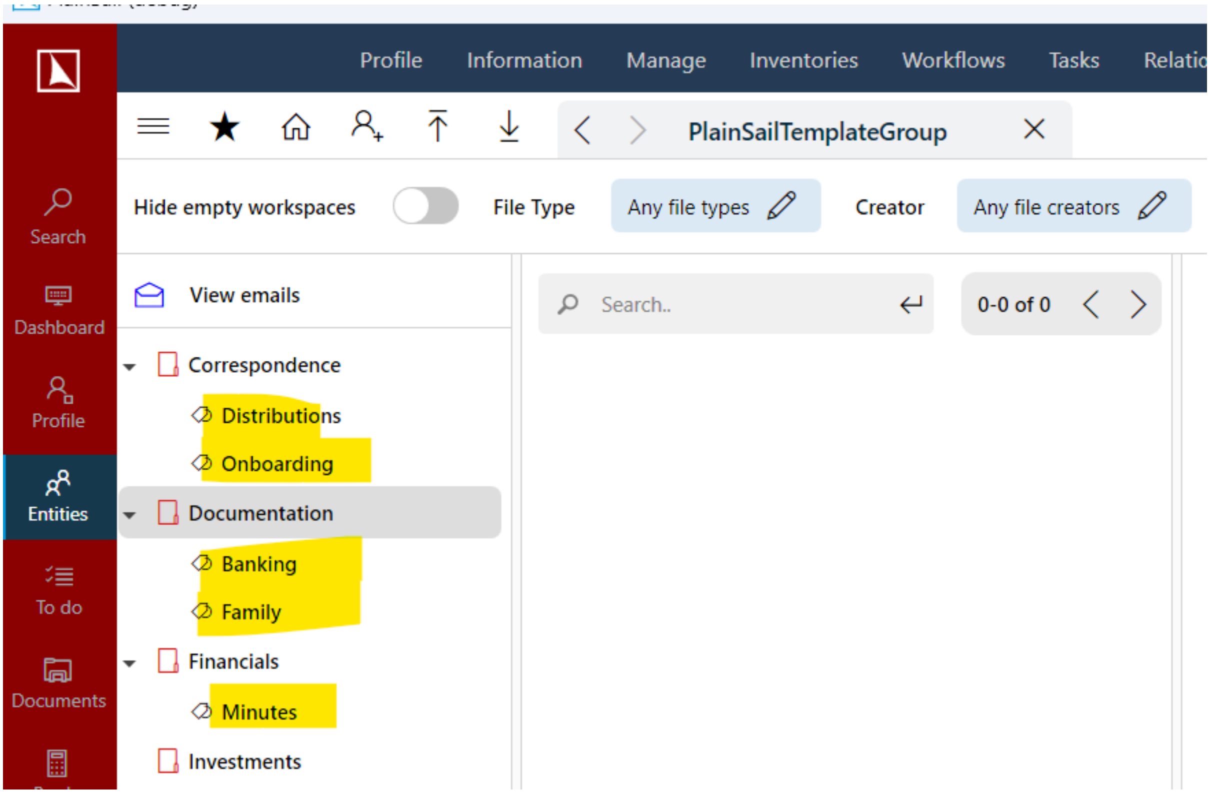
Creating Default Labels For New Entities

Labels belong to specific entities and workspaces but often you want to have a standard set of labels for each new entity or type of entity. You can do this by creating a template entity that is used as the default for all new entities. Here is how you do this:

1. If the entity does not already exist, create a new entity of type Group and give it the reserved name *PlainSailTemplateGroup*. Note that the name **must be exactly that** and you should set it to Requires Screening = No and Is Administered = No. PlainSail now ships with that entity as standard but your installation may be older. The current one looks like this:



2. Go to the Documents tab for that entity, click on Labels and add the standard labels that you want for all entities, for example:



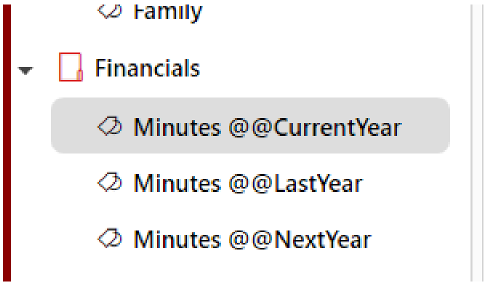
Whenever you create a new entity, it will be initialised with the same labels and sublabels as the template one.

Using Date Variables in Default Label Names

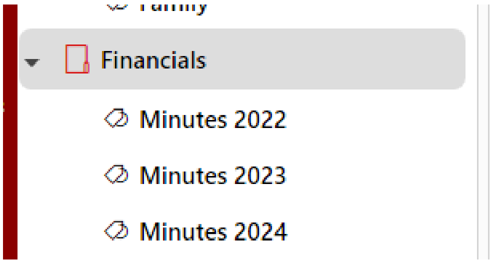
Often your labels and sublabels will contain the year in their name, for example, ‘Annual Minutes 2022, Annual Minutes 2023’ and so on. You do not want to have to keep changing these every year so instead you can put date variables in the label names and when the new entity is created the variable will be replaced by the appropriate year. The variables you can use are:

@@CurrentYear
@@NextYear
@@PreviousYear
@@LastYear

For example:



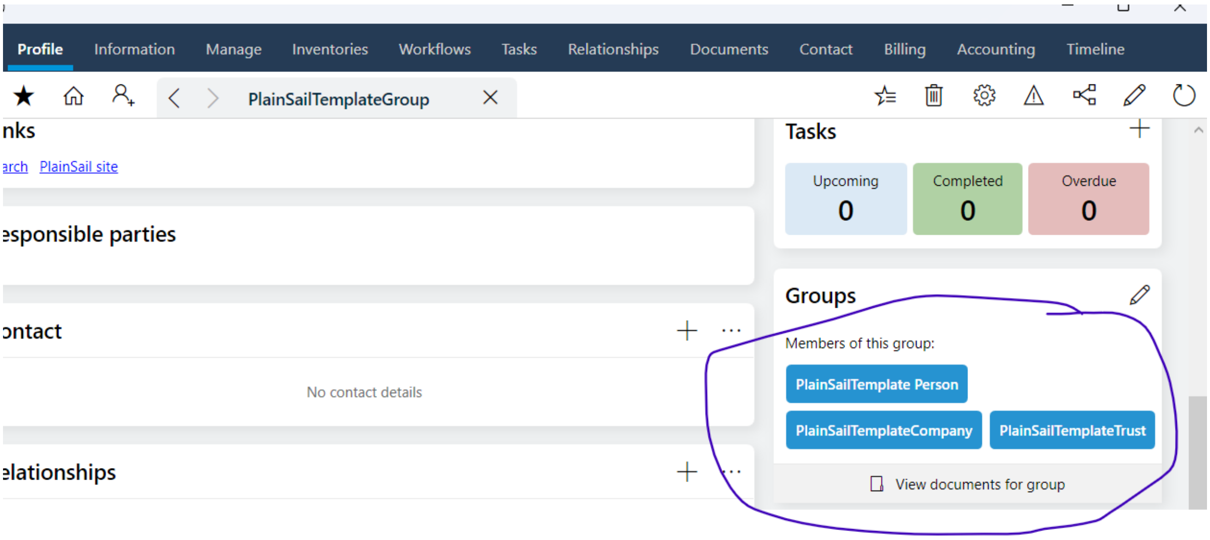
When you create a new entity (in 2023), that will be converted to:



Varying Your Default Labels By Entity Type

If you want a different set of labels and sublabels dependent on the type of entity, for example trusts, companies and people, all you need to do is add one of each type to the PlainSailTemplateGroup entity as a member of the group. You can either use existing entities as your model or you can create special ones just for that purpose. It is less messy and more obvious to use entities created specifically for that purpose with indicative names, although their actual names are irrelevant as only their types matter.

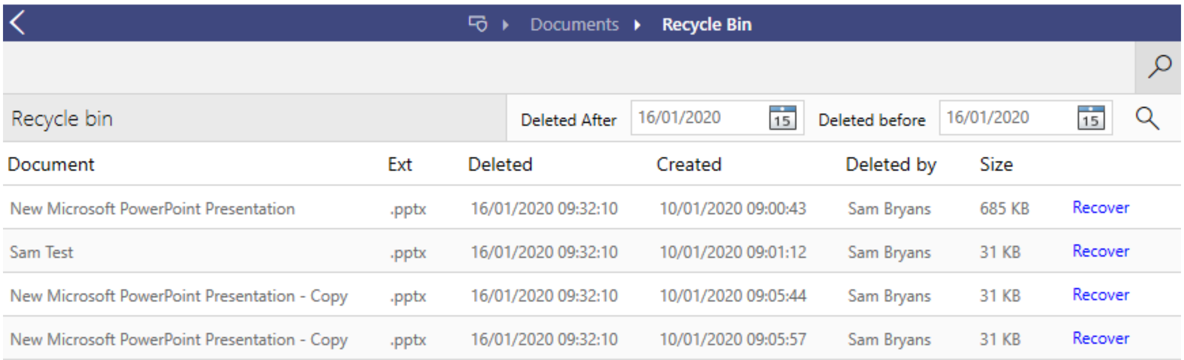
For example here we have created a Person, a Trust, and a Company and added them to the PlainSailTemplateGroup:



You can vary the label structure for each of those entities and when a new entity with the same type is created, it will be initialised with the specific labels for that type. To go back to the defaults for the Group just remove the specific entity from group membership.

Recovering deleted items

Documents deleted within PlainSail are retained for a period defined by your organisation. To recover a deleted document, navigate to **Admin -> Documents -> Recycle Bin:**



The recycle bin will list all documents you have deleted. If you wish to recover a document that another user has deleted you must ask your IT Administrator to do so, their Recycle Bin will list all other users deleted documents. You can use date filters and press Ctrl+F to search for the name of the document. Press **'Recover'** to restore a document.

Q&A

How do I set default labels for new entities

Create a special entity of type Group and give it the name *PlainSailTemplateGroup* then create the labels and sublabels you need in that entity. That will become a template for all new entities. See the section ‘Creating Default Labels For New Entities’.

How to attach a document to an email

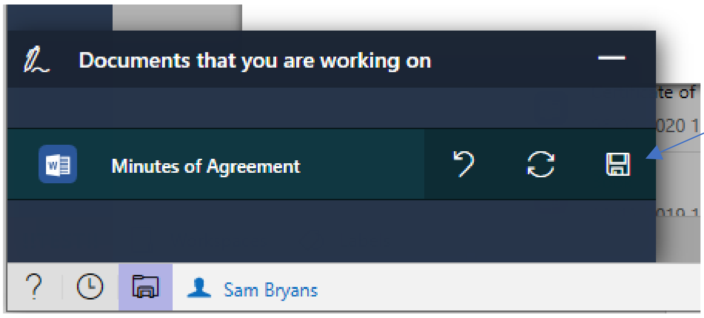
The quickest way to attach a document from PlainSail into an email is to right click the documents and press ‘**Copy File**’ you can then paste these into your email.

How to copy a document

If you need to copy a document as the basis of a new document (e.g. to use similar minutes as the basis of a completely new minute), double click the document and press ‘**Edit a copy of this document’**

Quickest way to check in documents

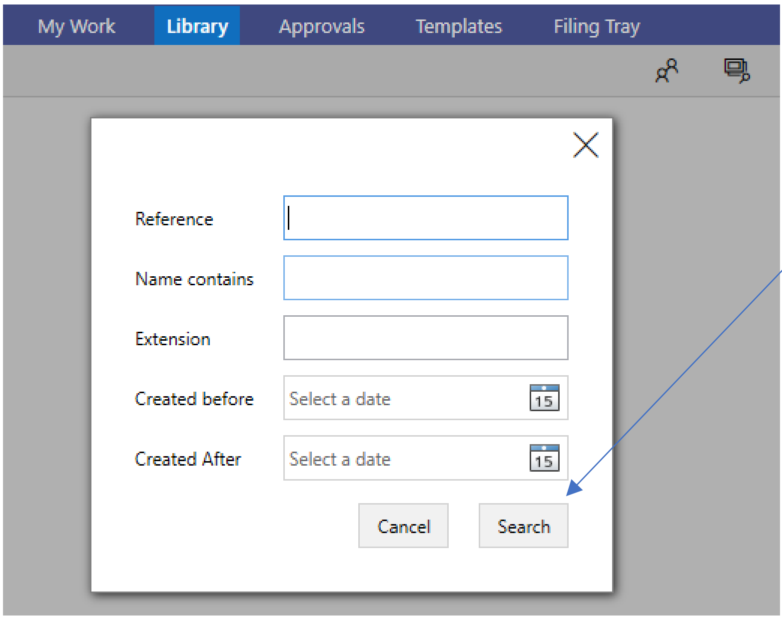
The quickest way to check documents back into PlainSail is to either use the **‘Save all’** button in **‘Documents -> My Work’** or to use the bottom bar shortcut which is available on every screen:



Save – click save to check the document back in to PlainSail.

How to search for a document across all clients

If you are not sure which client a document was saved to, navigate to **‘Documents -> Library’** and press the search icon, this will do a global search:



Enter your search criteria and press **'Search'** to list all results. This will display all documents you have permission to see which match the criteria.

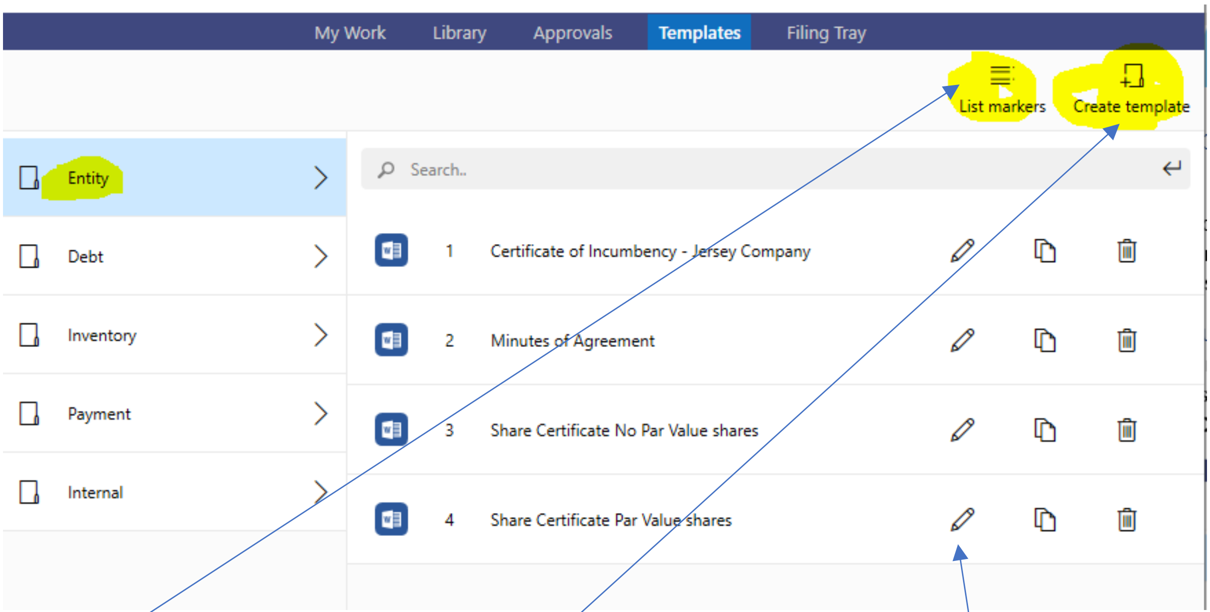
Document Templates

Overview

PlainSail can create Microsoft Word document templates that can be used to generate documents such as minutes, agreements, letters etc. Documents can contain markers which can populate documents with client specific information stored within PlainSail.

Managing document templates

To manage document templates within PlainSail you must have the correct permissions, if you do not have these permissions, please contact your system administrator. To create a new document template, navigate to **Documents -> Templates -> Click 'Entity':**



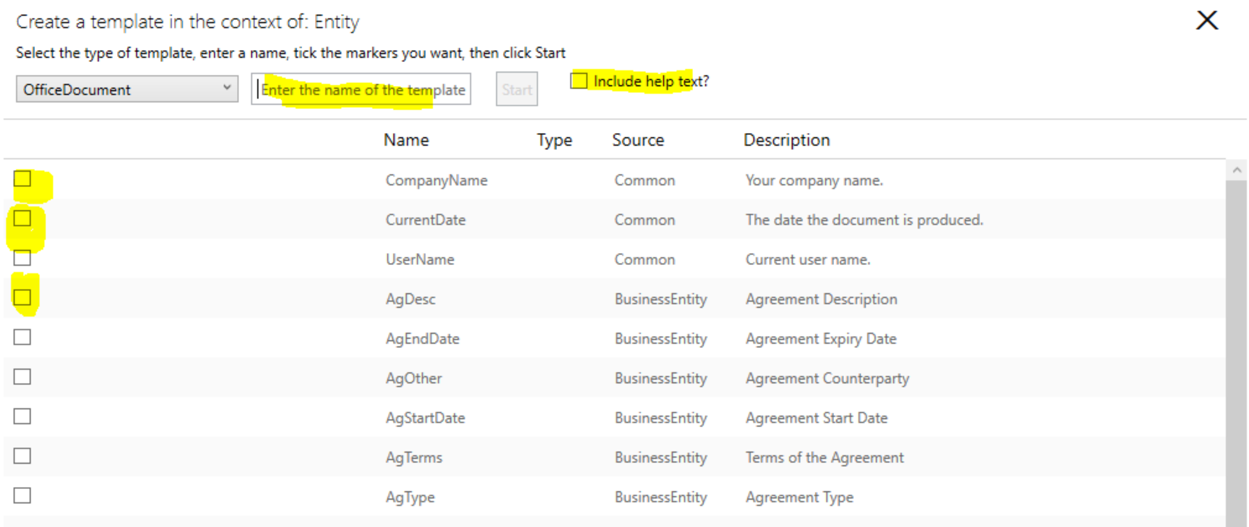
List markers – click here to view a list of standard markers available.

Create template – click here to create a brand-new template

Edit – click here to edit an existing document template.

Creating a new template

Click **Create template,** the following screen will be displayed:



Enter a name for the new document template. You can also tick to include help text into the word document which provides a summary of ways to format markers. The bottom pane of the screen lists available document markers which you can tick to have automatically inserted into your new template. Click **Start** to create the new template. A new Microsoft Word template will be created and appear in your list of template, click the **Edit** icon to open it.

Markers

Markers may be placed in a document template to substitute for information contained in PlainSail and when generated will be replaced by the relevant data.

A marker may be placed anywhere in the document and, if placed inside a table will attempt to fill the table with the required data.

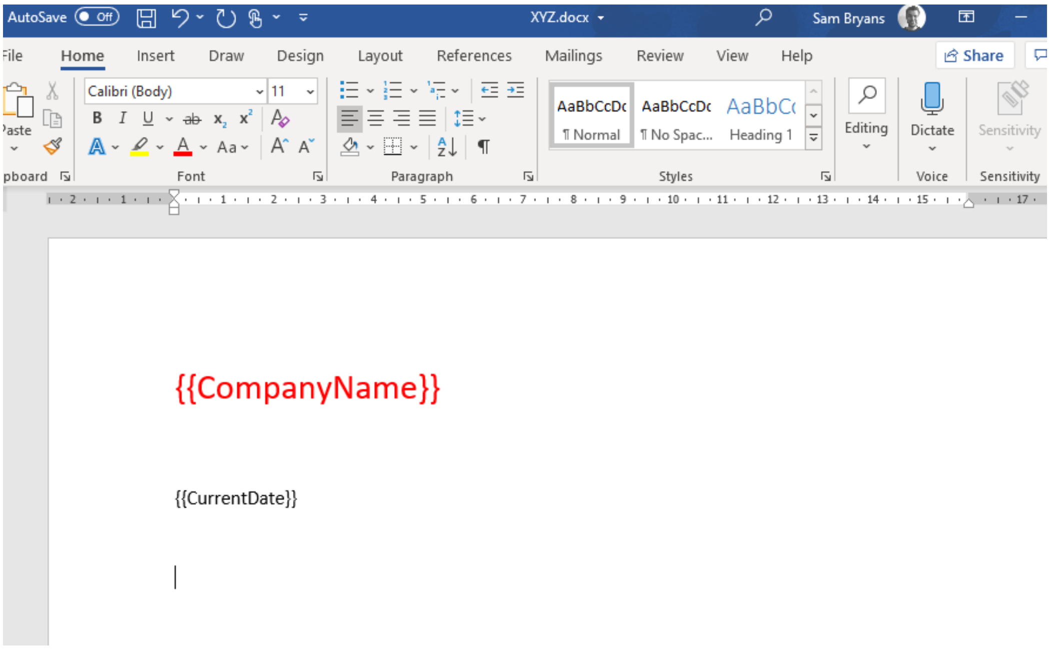
Markers must be predefined before usage and this may only be done by specialised personnel but, once defined, may be used by all users.

When you place a marker in a template, you can modify the results by specifying the format you want the data in and may also filter the data by stating which fields of information you require and by putting conditions on the data. For example, you may wish to list bank accounts for an entity but want only to include the Account Number, Name and Balance for Sterling accounts only.

The marker names are predefined and you can simply put that marker name into the document and when launched the appropriate data will be displayed in the document.

Using markers within a document

Within your Microsoft Word document you can insert markers at any point within the document, Markers will retain formatting that you give them and can be included within headers, paragraphs, footers and tables:



Using markers in a list or within a table

Markers that provide a list of data can be inserted in a table and should follow the below format, in this example a list of the entity's directors with their dates of births will be inserted.

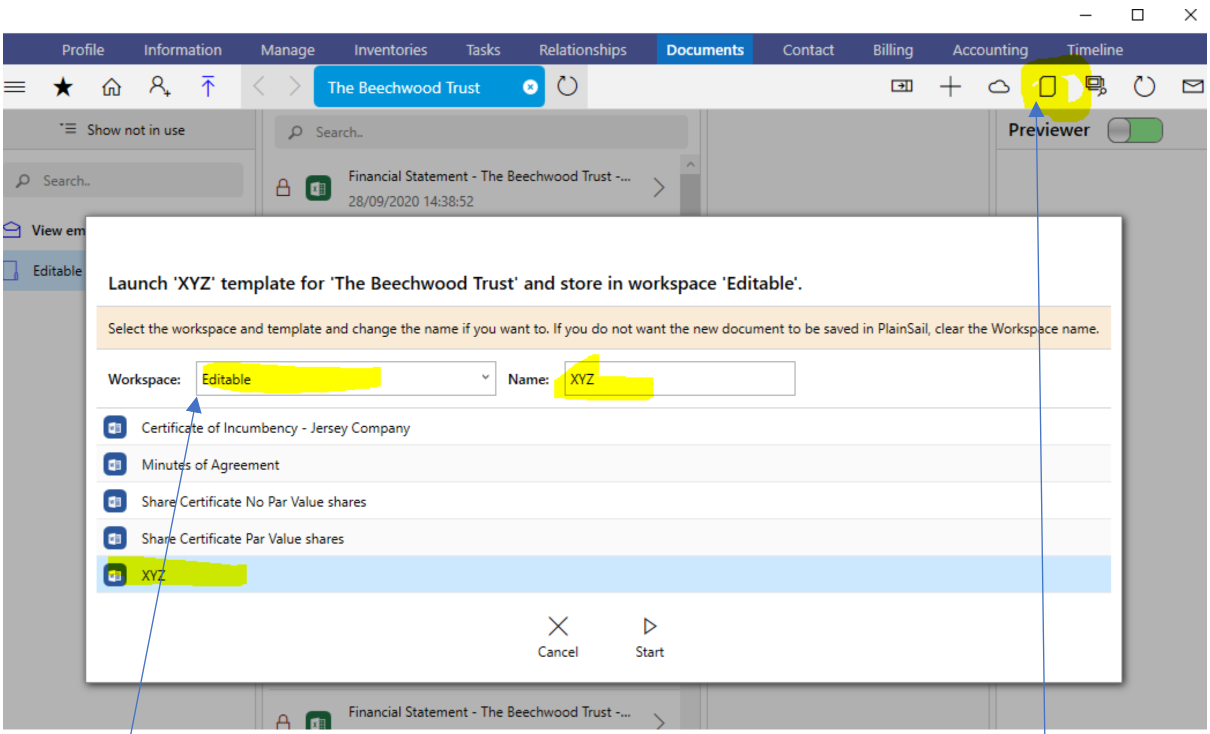
4. The Directors of the Company as at the date hereof are:-

Name	Date of Birth
{{Directors:inline}}	

When you have finished editing your template press **Save** in Microsoft Word and close the document. You must then check the document back into PlainSail in the same way you do for standard documents.

Launching a new document template

Navigate to **Entities -> Documents,** click the launch template icon and pick the template you would like to use. You must then choose a Workspace and enter the name of the document, click **Start.**



Choose a workspace – choose the workspace you would like to save the new document to.

Launch template – click here to a new template for the selected client.

Once a template has been launched it will automatically open in Microsoft Word and be checked out of PlainSail for you to edit. When you finished editing the document you must save it in Microsoft Word and then check it back into PlainSail.

Converting a Word Document to PDF

When you have finished editing your new document, you may wish to convert this to a PDF for electronic signature. To do this, right click the newly created word document and click '**Convert to PDF'**: