

Equipment & Services

TEMPLACMS

Version: 5.4.6



COMMERCIAL STATEMENT

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TABLE OF CONTENTS

INTRODUCTION	4
SYSTEM	4
System Control	4
Function (Security).....	4
Workflow Path	5
EQUIPMENT & SERVICES	5
Equipment & Services Setup.....	5
Equipment Audits.....	7
Site Assignment.....	8
STORES ORDER SUPPORT FOR EQUIPMENT	9
Product	9
Stores ordering process	9
Stores order un-posting.....	10
Equipment items.....	10
MOBILE.....	11
Equipment Audit	11
Equipment Audits.....	11

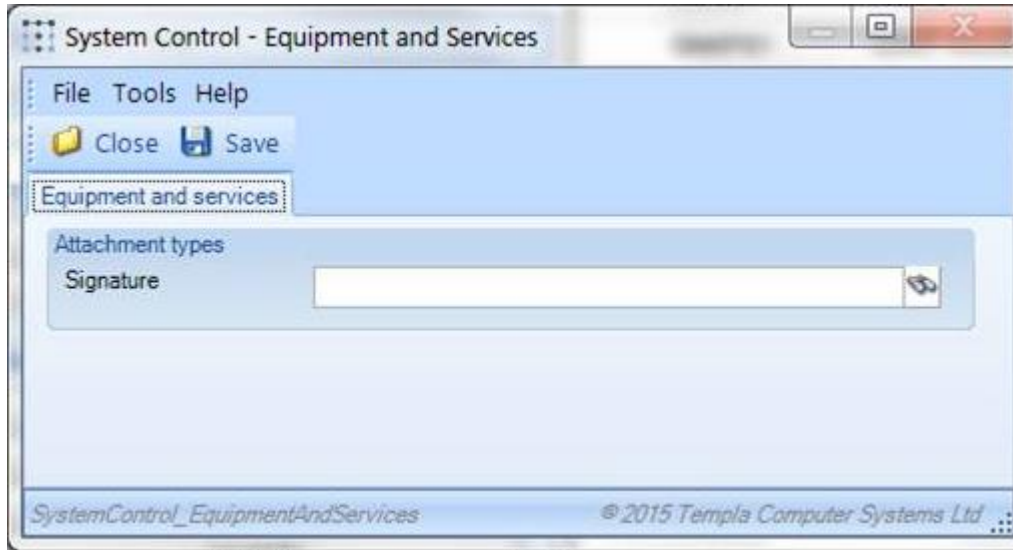
INTRODUCTION

These training session notes & are designed to provide background information and useful hands-on experience of using general CMS functions and the CMS payroll module. These notes are designed to complement the training and assist you at a later stage when away from the training environment.

SYSTEM

System Control

On System Control it is possible to assign an attachment type – this is for use when using equipment items via the mobile device.



Function (Security)

The following functions provide additional security for the assignment of equipment items to sites:

- Site – amend equipment
- Site – amend services
- Site – assign new equipment

Whilst a site has a single 'Equipment items' tab, each item has a specific nature of 'equipment' or 'service' based on the equipment group to which it belongs. The 'Site – amend equipment' and 'Site – amend services' functions may be used to restrict the user to work with either or both of these equipment items.

On pressing the 'add' button from the list of equipment items at a site, the user can currently select any existing equipment item as follows:

- With the function 'Site – amend equipment' – the user can select 'equipment' nature items that are currently assigned to a site to which they are authorised.
- With the function 'Site – amend services' – the user can select any 'service' nature items.
- With the function 'Site – assign new equipment' – the user can select 'equipment' nature items that are currently not assigned to any site.

Should an equipment item need to be assigned 'from' an area manager's unauthorised site, then the assignment can only be done by a higher-level security manager, e.g. their ops line manager, or by central admin. 'Equipment' nature items can only be assigned to one site at a time.

Selecting an 'equipment' item onto a new site automatically end dates its assignment to the previous site.

Workflow Path

If equipment auditing is to be used, the equipment audit completion workflow path must be defined to control which users an equipment audit is assigned to.

EQUIPMENT & SERVICES

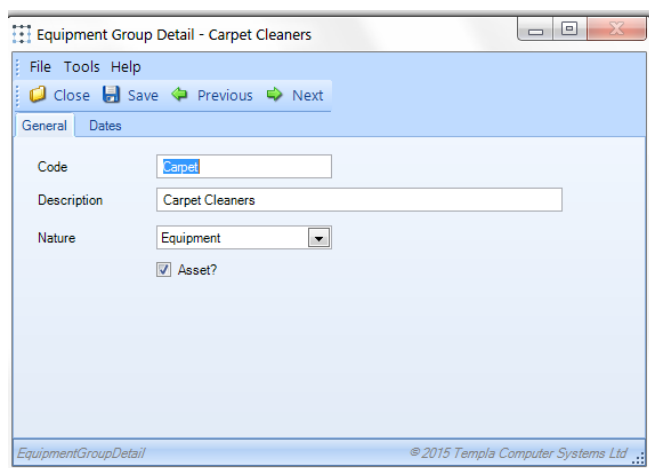
Equipment & Services Setup

The equipment option in Templa CMS provides a mechanism for identifying, classifying and keeping track of cleaning equipment or 3rd party services that exist on the site.

EQUIPMENT GROUPS

At the top level of CMS' equipment/services hierarchy exists equipment groups. Groups can be defined as either equipment or services and if equipment, whether this is an asset group (this is for use in the future where a full asset register facility may be provided).

A new equipment/services group can be created from the 'Equipment Groups' option, accessible from the Maintenance -> Purchasing -> Equipment menu' by clicking on 'New'

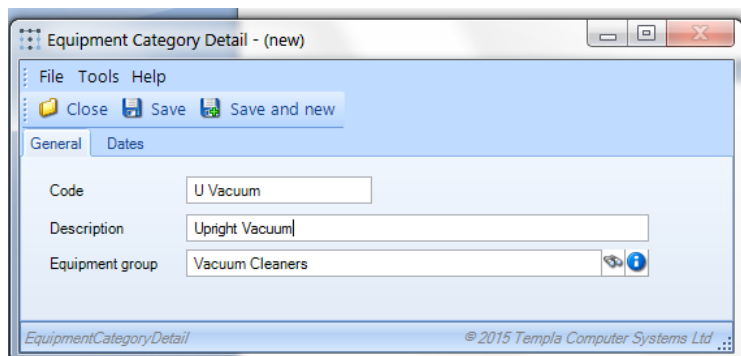


Nature – this can be equipment or service, where service can be used for non-physical goods, i.e. a service contract offered

Asset – if the nature is equipment then the group can also be flagged as an asset; this

EQUIPMENT CATEGORIES

Equipment categories exist as an intermediate stage between groups and items allowing multiple categories to be defined per group. To create a new category click on 'New' from the 'Equipment Categories' option and enter the details as required.



EQUIPMENT/(SERVICE) ITEMS

Equipment items belong to the category and thus group, from where its nature is derived.

Missing – if an equipment item has gone missing from a site, then this can be manually recorded against the equipment item or via the Equipment Audit

PAT testing – PAT testing dates can be manually maintained on an equipment item or via the Equipment Audit; the equipment item list/filter (see below) can be used to determine equipment items that are due for PAT testing in the coming month(s).

Equipment details – if the equipment item is created from a TemplaCMS Stores Order and/or Goods Receipt, these details will be automatically populated by the system but can also be manually entered or updated. Where an asset is additionally defined an asset number may also be entered.

Purchase details – if the equipment item is created from a TemplaCMS Stores Order and/or Goods Receipt, these details will be automatically populated by the system.

Equipment and service items can also be assigned: user-defined properties, attachments and process sheets.

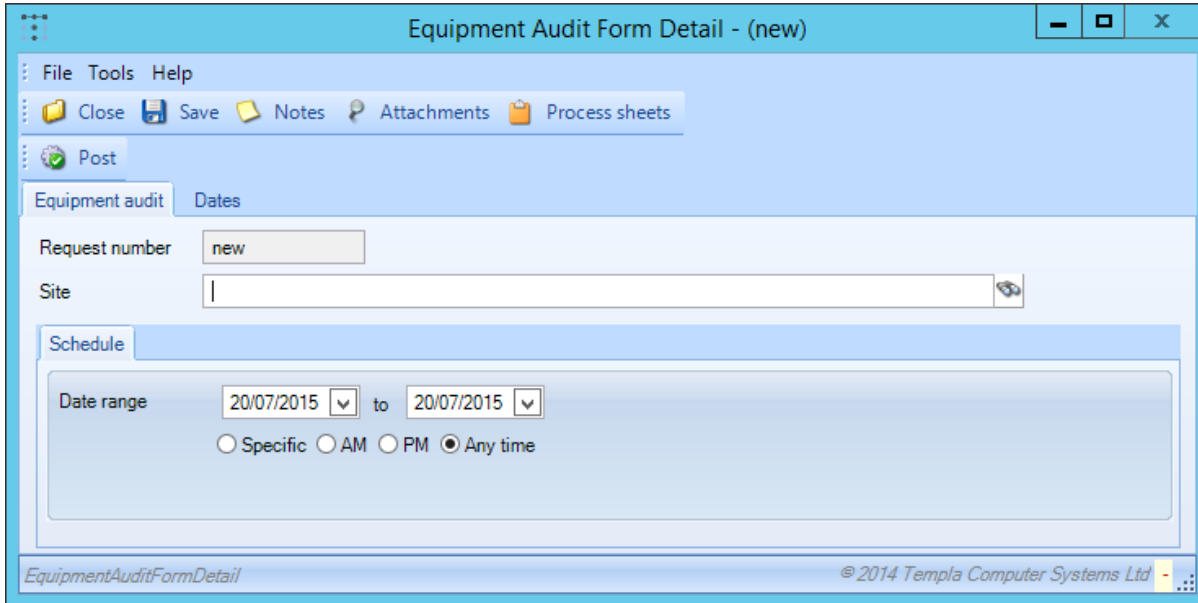
EQUIPMENT/SERVICES LIST

The Equipment list provides full analyser capabilities so that access to all items can be filtered, displayed and grouped, with the ability to directly maintain the site assignments without the need for effecting a contract variation

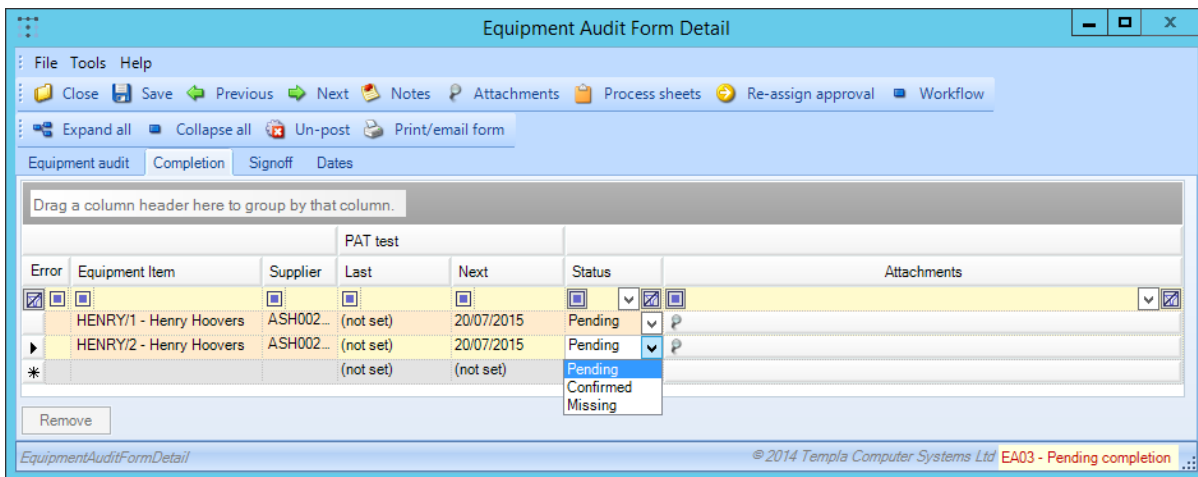
St	Contract Manager	Code	Asset number	Purchase date	Purchase value	Current site	Effective	Last PAT date	Next PAT date	Frequen	Frequen	Missing
Equip group : Vacuum - Vacuum Cleaners (3 items)												
Equip category : BP Vacuum - Back Pack Vacuum (8 items)												
NA		JMBEQUIP/1		14/07/2015 0	£32.48	RCCP/01 - RCC	14/07/2015			0	0	<input type="checkbox"/>
NA		JMBEQUIP/2		14/07/2015 0	£32.48	RCCP/01 - RCC	14/07/2015			0	0	<input type="checkbox"/>
JOHN JOHNSON		JMBEQUIP/3		14/07/2015 0	£32.48	WRCH/01 - WRC	14/07/2015			0	0	<input type="checkbox"/>
NA		JMBEQUIP/4		14/07/2015 0	£28.00	RCCP/01 - RCC	14/07/2015			0	0	<input type="checkbox"/>
NA		JMBEQUIP/6		14/07/2015 0	£28.00	RCCP/01 - RCC	14/07/2015			0	0	<input type="checkbox"/>
KEVIN HOLMES		JMBEQUIP/8		14/07/2015 0	£32.48	TWCS/01 - TWC	14/07/2015			0	0	<input type="checkbox"/>
GEORGE WILSD		JMBEQUIP/9		14/07/2015 0	£32.48	SCWT/01 - SCW	14/07/2015			0	0	<input type="checkbox"/>
▶ KEVIN HOLMES		JMBEQUIP/10	AS556698	14/07/2015 0	£32.48	AAWS/01 - AAW	14/07/2015			1	Years	<input type="checkbox"/>
Equip category : T Vacuum - Tub Vacuum (1 item)												
Equip category : U Vacuum - Upright Vacuum (1 item)												

Equipment Audits

An equipment audit can be produced for any site at any point:

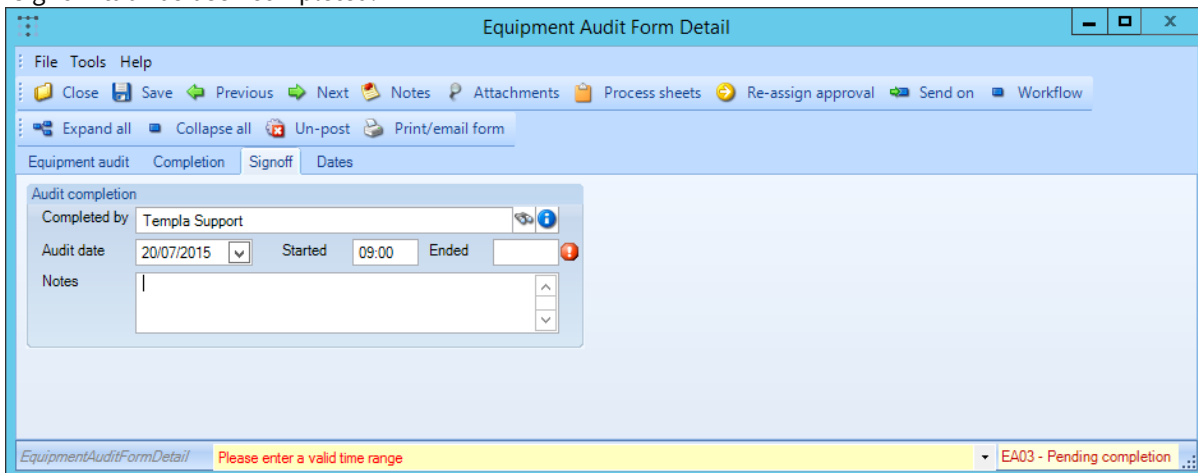


Once **posted**, workflow will assign the equipment audit to the relevant user to complete, either on TemplaCMS or via the mobile device. On TemplaCMS, the items can be marked as confirmed or missing, plus the PAT test dates updated if required:



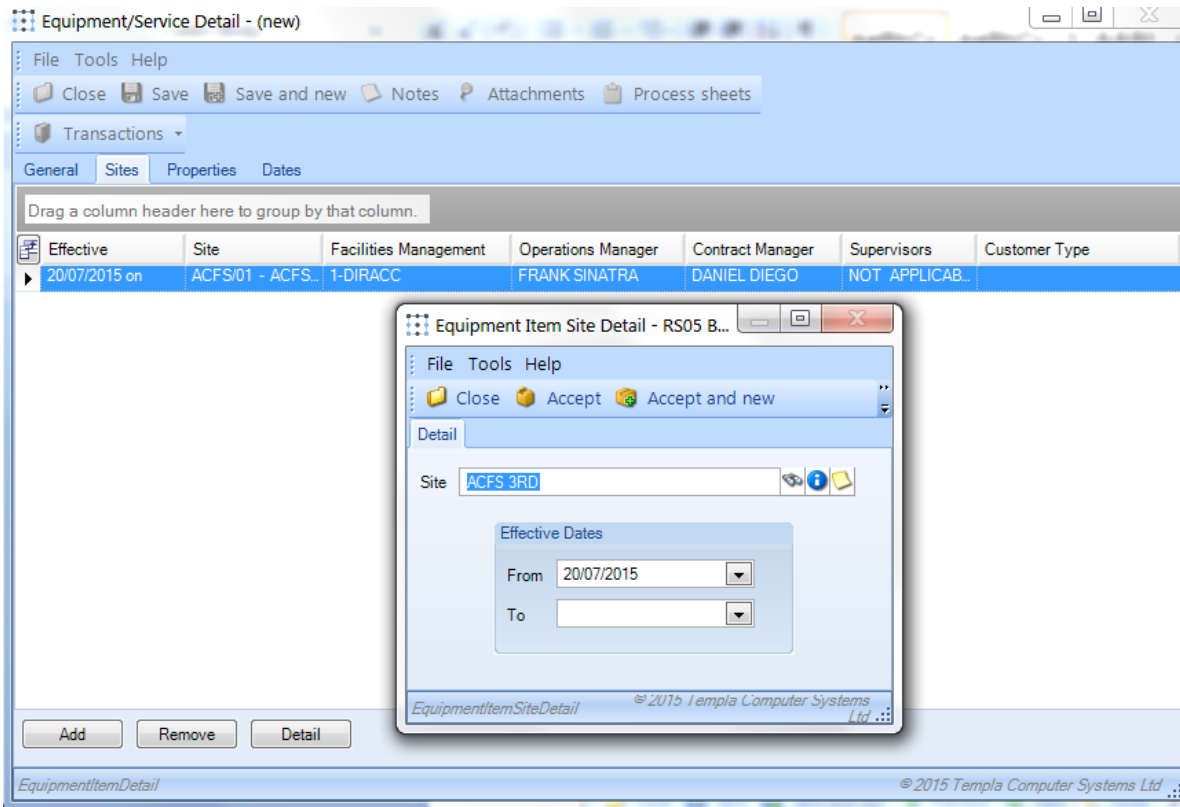
Additional equipment items can also be added to the audit, i.e. where an item has been moved to a site but this is not recorded on the system.

Once all items have been marked as completed or missing then the audit can be 'Sent On' through workflow, once the final 'Signoff' tab has been completed:



Site Assignment

Equipment and services items can be assigned to Sites via the equipment item itself using the 'Sites' tab (see above) or via the 'Equipment items' tab.



Each assignment is controlled through effective dates.

Please note: an equipment item can only be assigned to one site at a time and thus assignment to another site will automatically end date any prior assignments. The current site for any equipment item can be seen via the Equipment Item listing.

STORES ORDER SUPPORT FOR EQUIPMENT

The stores ordering process can be used to order equipment items and can allow the automatic creation of the equipment item, its assignment to site and the capture information from the purchase invoice.

Product

The following two options can be defined on a product:

- Create equipment item?
- Equipment category

Entry of an equipment category is only possible when the 'create equipment item' flag has been ticked. Furthermore, a product so ticked will implicitly be marked as 'non-stock', and have all unit factors (purchased, sold, stocked) set to 1.

The screenshot displays a software window titled "Products - 25 Mtr EXTENSION REEL WITH RCD". The window has a menu bar with "File", "Tools", and "Help". Below the menu bar is a toolbar with icons for "Close", "Save", "Save and new", "Previous", "Next", "Notes", and "Attachments". A "Transactions" dropdown menu is visible. The main area is divided into tabs: "General", "Price groups", "Suppliers", "Audit", and "Dates". The "General" tab is active, showing the following fields and options:

- Code:** TMPEQUIP407
- Description:** 25 Mtr EXTENSION REEL WITH RCD
- Product category:** Equipment Miscellaneous
- VAT:** (Select for override)
- Checkboxes:** COSHH, Monitored product, Non stock, Ad hoc
- Activity status:** Active
- Checkboxes:** Create equipment item?
- Equipment category:** Vacuum Equipment

Below these fields is a "Units" section with three rows:

Units	Quantity	Item
Purchased as	1	Item
Sold as	1	Item
Stocked as	1	Item

The footer of the window shows "ProductDetail" on the left and "© 2014 Templa Computer Systems Ltd" on the right.

Stores ordering process

Goods receipts can be entered manually for a stores order or be automatically created as a result of purchase invoice matching a stores order item. Regardless of the method of creation, the action of posting a GRN will take the product settings into account – this should only be done when ordering for a direct site, i.e. not an 'internal stores' site.

On receipt of a product flagged to 'create equipment item', an equipment item will be created for each unit received, as follows:

- **Code** – generated based on the product code, and an ascending unique number. Thus where multiple items are created from a single receipt line, they are consecutively numbered.
- **Description** – taken from the product description, or the ad-hoc text from the stores order line (if an ad-hoc product)
- **Equipment category** – taken from the product definition
- **Purchase date** – the GRN delivery date
- **Purchase value** – the unit cost from the GRN line (which will have been derived from the purchase invoice if the GRN was auto-created)

Each created equipment item will be automatically assigned to the site, effective from the delivery date. Where a purchase invoice is matched to an existing goods receipt line, the post of the purchase invoice updates the equipment item with the correct purchase value.

Stores order un-posting

To un-post a stores order, the GRNs, purchase and sales invoices must be un-posted first, and in sequence, due to the references between them (see 'Stores Order Reversal process'). As equipment items also reference GRNs, these cannot be un-posted until the equipment items have been manually deleted first. Un-posting of a purchase invoice has no effect on equipment items.

Equipment items

A reference to the GRN that created an equipment item will be held on each item in addition to the supplier, stores order number and purchase invoice number (if one exists). These details are also visible on the list.

The screenshot shows a software window titled "Equipment/Service Detail - Extension cable". The window has a menu bar with "File", "Tools", and "Help". Below the menu bar is a toolbar with icons for "Close", "Save", "Save and new", "Previous", "Next", "Notes", "Attachments", and "Process sheets". The main area is divided into several sections:

- Transactions:** A dropdown menu showing "General" (selected), "Sites", "Properties", and "Dates".
- Code:** A text field containing "TMPEQUIP407/1".
- Description:** A text field containing "Extension cable".
- Equipment category:** A dropdown menu showing "Vacuum Equipment".
- Missing?:** A checkbox that is currently unchecked.
- PAT testing:** A section with three fields: "Last PAT date" (dropdown), "Next PAT date" (dropdown), and "Frequency" (text field).
- Equipment details:** A section with three fields: "Purchase date" (dropdown showing "26/02/2014"), "Purchase value" (text field showing "£32.65"), and "Asset number" (text field).
- Purchase details:** A section with four rows of data:
 - Purchase invoice number:** 10213 Invoice for DURYT dated 26/02/2014 due 28/03/2014
 - GRN number:** 11465 dated 26/02/2014 from DURYT - DURYT
 - Stores order number:** 8573 Tower House dated 26/02/2014 required 26/02/2014
 - Supplier:** DURYT

The footer of the window contains the text "EquipmentItemDetail" on the left and "© 2014 Templa Computer Systems Ltd" on the right.

MOBILE

Equipment Audit

On entering the **Equipment Audit** option, **Equipment Audits** are displayed in three lists:

- **To Do** – list of equipment audits that need to be completed by the current user
- **O/S** – list of all equipment audits that need to be completed, by the current or other users, but only for those sites the current user is authorized to; all staff training forms on the 'To Do' list will appear on the 'O/S' list but not vice-versa
- **All** – list of all equipment audits that have been completed, by the current or other users, but only for those sites the current user is authorized to

Equipment Audit: 102 + New

Search site... To Do O/S All

**50/1 - a554

EA number: 102
Scheduled: 13/02/2014 - 13/02/2014
Scheduled details: 00:11 - 00:22
Completed: No

EA number: 103
Scheduled: 13/02/2014 - 13/02/2014
Scheduled details: 00:11 - 00:22
Completed: No

PNE006/1 - Penfold Consultants Ltd

EA number: 50
Scheduled: 15/12/2013 - 16/12/2013
Scheduled details: 10:00 - 12:00
Completed: No

Equipment audit details

Equipment audit num...	102
Site	**50/1 - a554
Client	Alan Group Ltd

Schedule

Schedule from	13/02/2014
Schedule to	13/02/2014
Schedule details	00:11 - 00:22

New – this allows the user to create a new equipment audit but only where an equipment audit has already been created for a site. Initially, a temporary equipment audit number is held on the mobile device but once uploaded to the main TemplaCMS system, a 'real' equipment audit number is assigned and the temporary number subsequently updated on the mobile.

Equipment Audits

Equipment Audit: 102 + New

Search site... To Do O/S All

**50/1 - a554

EA number: 102
Scheduled: 13/02/2014 - 13/02/2014
Scheduled details: 00:11 - 00:22
Completed: No

EA number: 103
Scheduled: 13/02/2014 - 13/02/2014
Scheduled details: 00:11 - 00:22
Completed: No

PNE006/1 - Penfold Consultants Ltd

EA number: 50
Scheduled: 15/12/2013 - 16/12/2013
Scheduled details: 10:00 - 12:00
Completed: No

Equipment audit details

Equipment audit num...	102
Site	**50/1 - a554
Client	Alan Group Ltd

Schedule

Schedule from	13/02/2014
Schedule to	13/02/2014
Schedule details	00:11 - 00:22

EQUIPMENT AUDITS – RESULTS

Equipment Audit: 53 + New

General **Results** Completion

All **Entered Only**

Expand **Group: User Entered Equipment items**

Expand **Group: A**

Expand **Group: Assets**

Expand **Group: B**

Scheduled details: 00:11 - 00:22
Completed: No

PNE006/1 - Penfold Consultants Ltd

EA number: 50
Scheduled: 15/12/2013 - 16/12/2013
Scheduled details: 10:00 - 12:00
Completed: No

EA number: 52
Scheduled: 15/12/2013 - 16/12/2013
Scheduled details: 10:00 - 12:00
Completed: No

On the results screen (overleaf), the following fields can be entered for each equipment item (here grouped by group and category): 'Last PAT test', 'Next PAT test' and 'Status'.

Equipment Audit: 53 + New

General **Results** Completion

All **Entered Only**

Expand **Group: User Entered Equipment items**

Collapse **Group: A**

Collapse **Category: C**

Equipment item	Supplier	Last PAT test	Next PAT test	Status
AH001/1 - Computer desk	CAN001 - Cain Islan			Missing

Expand **Group: Assets**

Expand **Group: B**

A toggle between **All** and **Entered** is available: Entered, will show all the equipment items that have had details entered, these are highlighted in green.

New – this allows the user to create a new equipment item to be defined in which case free text can be added into the equipment item field.

EQUIPMENT AUDITS – COMPLETION

Equipment Audit: 53 + New

General Results **Completion**

Confirmation

Completed?

Notes AJ NOTES



TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit teamsoftware.com.