TEAM Software
by **WORKWAVE**

User Set Up Workflow and Maintenance

TEMPLACMS
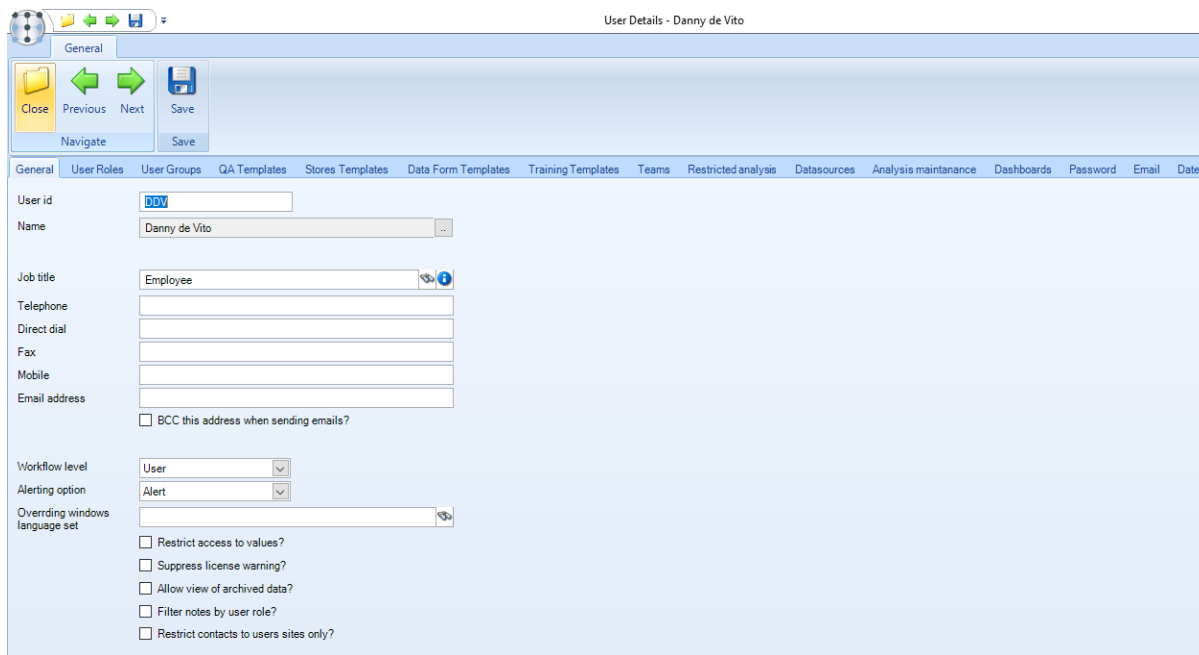
Version: v.6.1.0

COMMERCIAL STATEMENT

This document is subject to any terms as per teamsoftware.com/legal.

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USER MAINTENANCE

New users can be set up or existing user properties amended from the *Maintenance > User access and security* menu:

General

User ID – this must be unique to each user and is used on the 'log on' screen.

Name – enter the user's name via clicking on '…' and completing the details.

Job title – select a job title or create a new one on the fly. The job title can be used in document mail merges.

Telephone – enter the user's phone number (optional).

Direct dial – enter the user's direct number or extension (optional).

Fax – enter the user's fax number (optional).

Mobile – enter the users mobile phone number (optional).

Email – enter the user's email address (optional).

BCC this email address when sending emails? – if ticked the user will be blind copied on all emails that are sent out from **TemplaCMS**.

Workflow level:

- User – the new user will be included within the systems workflow i.e. work can be assigned to them. A 'user' cannot re-assign items in workflow.
- Manager – the user is included in the workflow and can re-assign items in workflow from one user to another.

Alerting Option – this specifies how the user will receive alerts relating to activity within **TemplaCMS:**

- Alert – provides on-screen pop-ups and will also be displayed on the Alerts home page.
- Email – the user will be emailed all alerts.
- Email & Alerts – the user will be notified by both of the previous methods.

Restrict access to values? – if ticked the user will not be able to see *any values* for example *wage budgets, employee rates of pay, contract values etc.*

Suppress license warning – when the **TemplaCMS** license is nearing its expiry date, a notification will appear on screen every time a user logs on. If this box is ticked the user will not be shown this message.

Allow a view to archived data? – if ticked the user will be able to view older data which has been archived. Standard business analysis restrictions will apply.

Filter notes by user role? – if ticked the user will only see notes entered by users who share at least one 'user role' with them.

Restrict contacts to users sites only? – if ticked the user will only be able to view contacts assigned to sites that fall within the users business analysis restrictions.
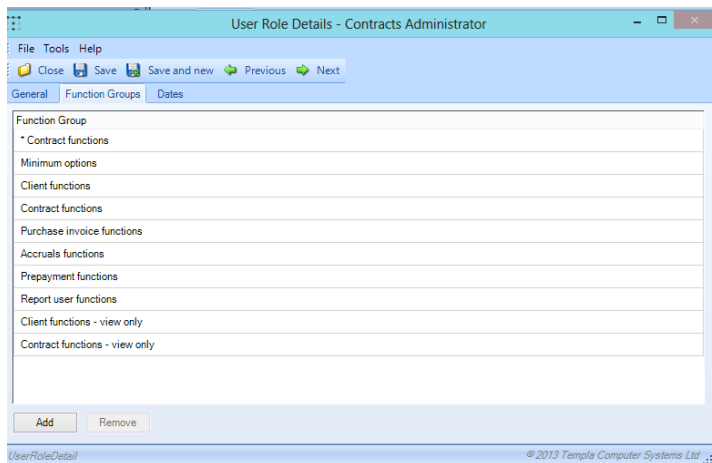
User Roles

A user can be assigned more than one user role.

F*unction groups are assigned to user roles and therefore define which functions the user has access to.*

For example, a user with a User Role of 'Contracts administrator' may have access to the following Function Groups:
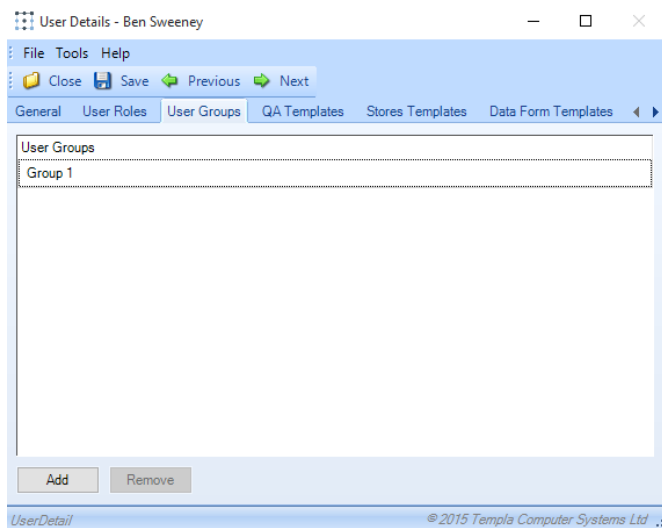
- Basic Functions
- Client Administrator Functions
- Contract Administrator Functions
- View Functions

User roles can be created or amended from the User Access/Security option on the Maintenance menu.
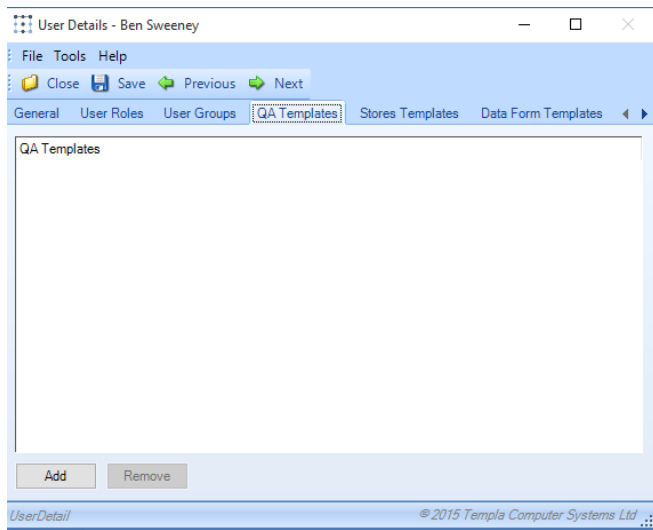
User Groups

Within **TemplaCMS** it is possible to create groups of users, this can make setting alerts etc. easier.
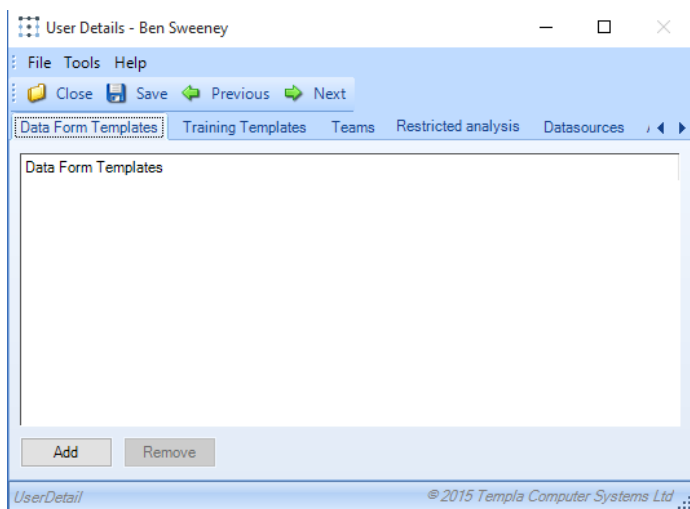
QA templates

Adding a **QA Template** to the user will allow them to create a **QA** from this **QA template**, i.e. use a blank template to then complete at any site they have access to.
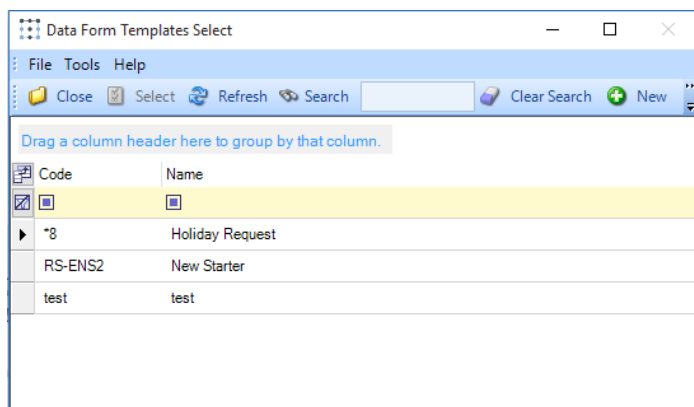

Data Form Templates

Within **TemplaCMS Data forms** are very flexible and cover a wide variety of areas. Assigning a template to a user will allow them access to this template should it be required.

Add – clicking **add** will open a list of all existing **Data Form Templates**, these can be added to the user simply by double-clicking on the **Data Form Template**.
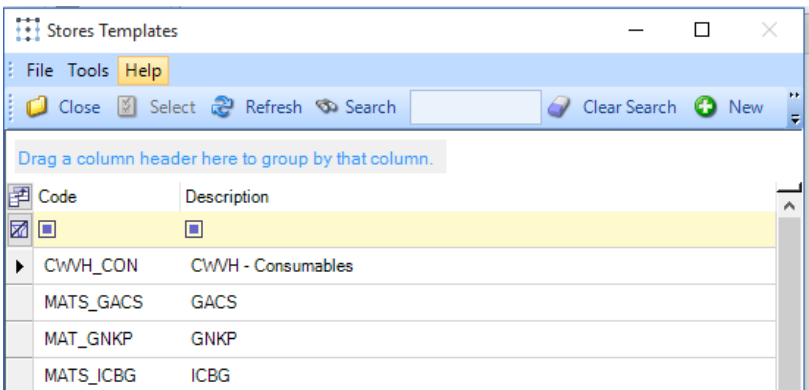

Remove – clicking **remove** when a **Data Form Template** is highlighted will un-assign that **Data Form Template** from the user.

Stores Templates
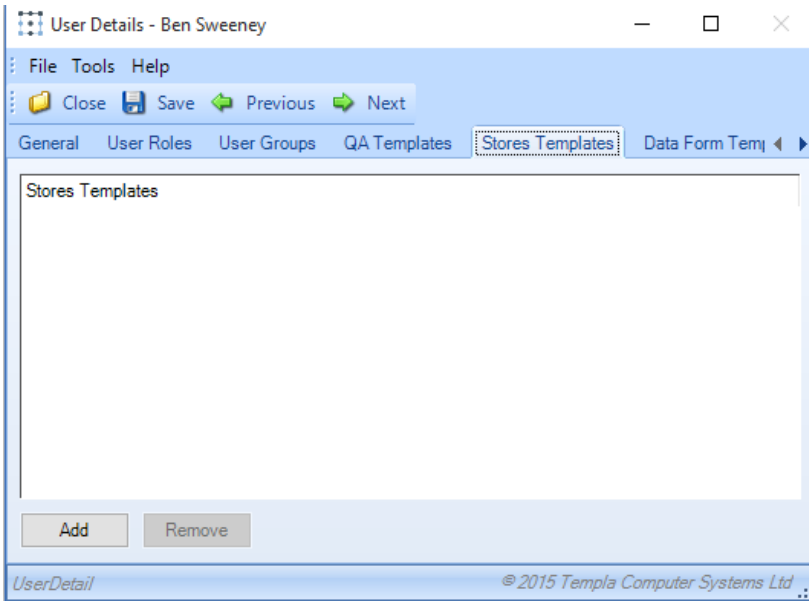
Assigning a **Stores Template** to a user will allow them to use this template as a basis from which to select items when placing a **Stores Order** or **Stores Order Request**.

Add – clicking **add** will open a list of all existing **TemplaCMS Stores Templates**, these can be added to the user simply by double-clicking on the **Stores Template**.

Remove – clicking **remove** when a **Stores Template** is highlighted will un-assign that particular **Stores Template** from the user.

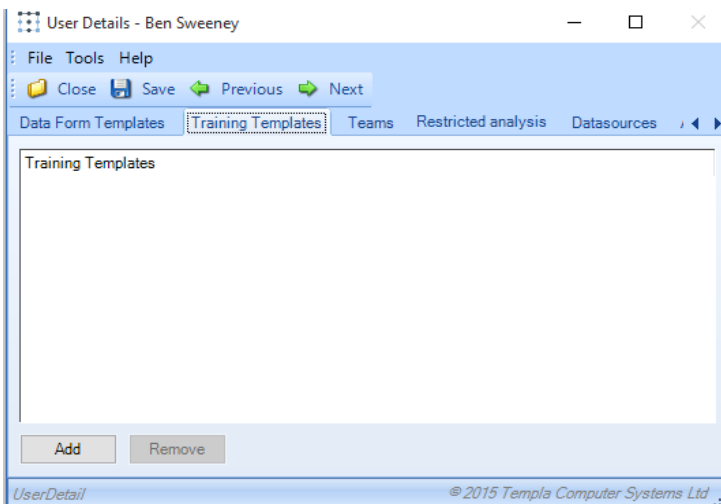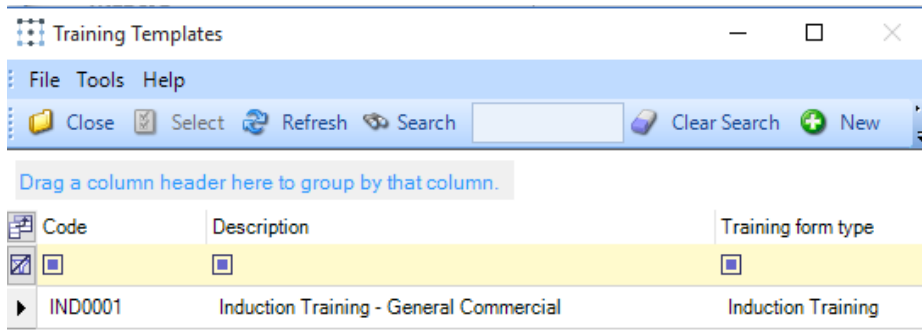# Training Templates

TemplaCMS allows for the creation of multiple *Training Templates* to cover many different areas, assigning a template to a user will allow them to complete the necessary training from when others have been trained.

Add – clicking *Add* will open a list of all existing *Training Templates*, these can be added to the user simply by double-clicking on the *Training Template*.

Remove – clicking *Remove* when a *Training Template* is highlighted will un-assign that Training Template from the user.

Teams
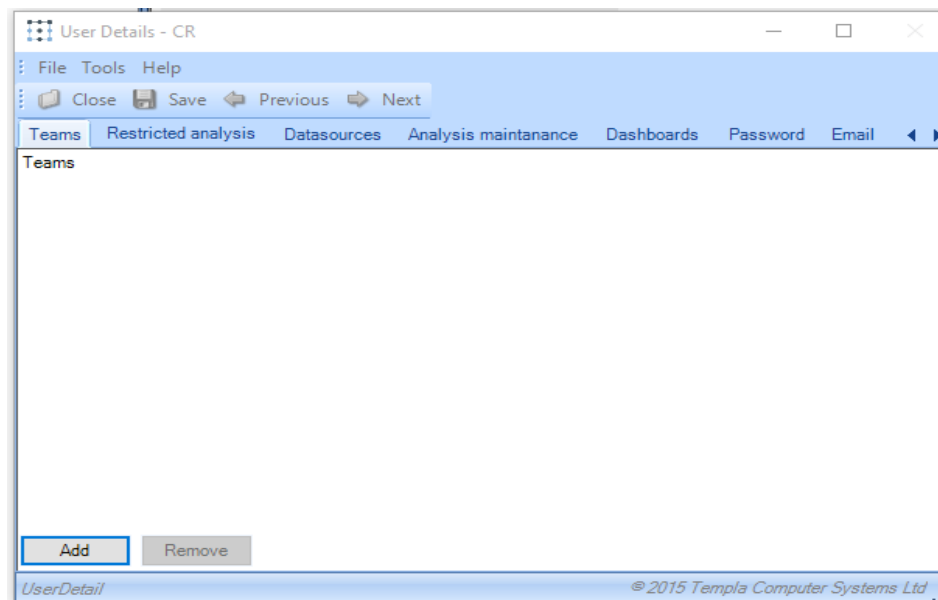
TemplaCMS allows for the creation of working *Teams* so as to allow for employees who work together on a particular job(s) on a regular basis to be assigned with greater ease.

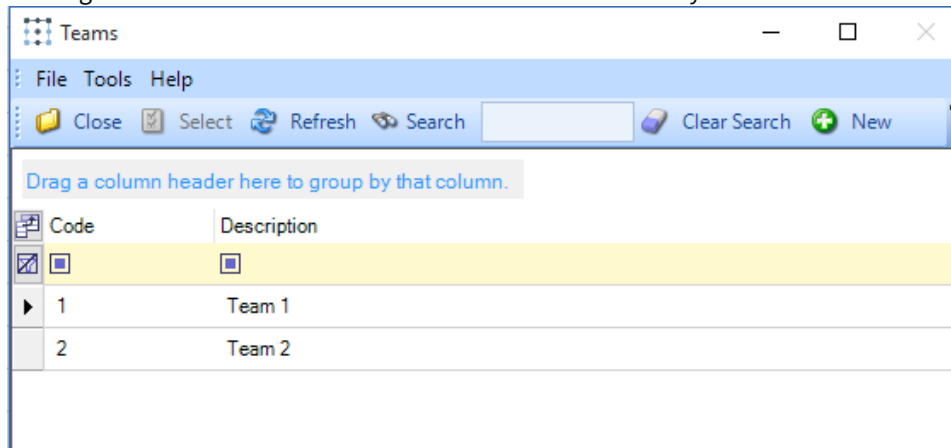*Add* – clicking *Add* will open a list of all existing *Teams* withing **TemplaCMS**, these can be added to the user simply by double-clicking on the relevant *Team*. The user will then automatically be included in the *Team*.

Remove – clicking *Remove* when a *Team* is highlighted will un-assign that particular *Team* from the user.

Restricted Analysis Tab

This controls what part of the business a user can work on. i.e. a user can be restricted to any level of the business analysis structure, for example 'Contract Manager' for Area 3 or unrestricted if desired.
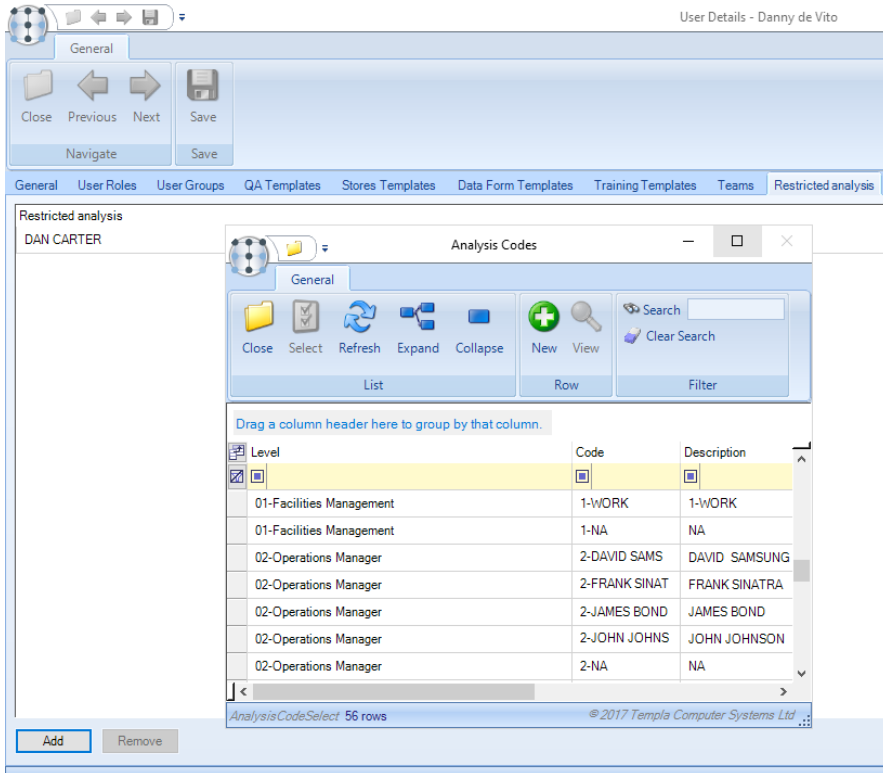
Within TemplaCMS it is possible to restrict the sites, contracts, employees etc. based on predefined *Business Analysis* levels. If no restriction is added here then the user will have access to all sites, contracts etc.
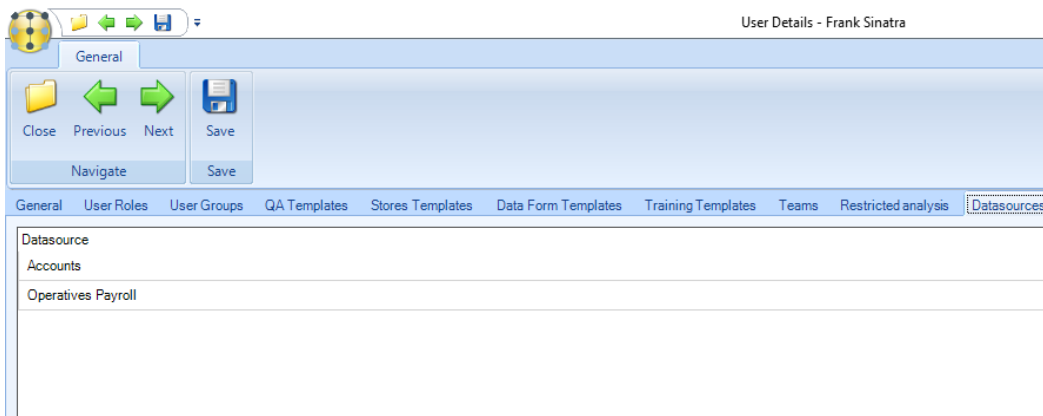
Datasources

This option is to support clients with multiple company structures which include multiple ledgers and payrolls.

Users can optionally be assigned to a list of datasources (for example Access accounts or payroll databases) to which they are restricted. If a user has no datasource restrictions they are deemed to be unrestricted and can access information from all datasources.

The exception to this rule is when the data is in conflict with a user's business analysis restrictions. For example, an area manager restricted to 'Area A' can see ALL employees and clients that are in 'Area A' regardless of their datasource.

Datasources refer to any Dimensions Accounts and SelectPay Payroll databases that are integrated with TemplaCMS. Assigning a datasource to a user allows them to see information that is contained in these external databases (thought restrictions are still applied).

Add – clicking *Add* will open a list of all existing *Datasources* linked to **TemplaCMS**, these can be added to the user simply by double-clicking on a relevant code.

Remove – clicking *Remove* when a code is highlighted will un-assign that particular code from the user.

Analysis Maintenance

The level of authority users have to add, remove and amend *Business Analysis codes* at each *Business Analysis level* can be restricted via this tab.

This lists all defined business and marketing analysis levels, allowing three checkboxes to be defined against each:

- Allow add
- Allow change
- Allow delete

If no individual level checkboxes are ticked, the 'un-restricted' checkbox should be ticked. At installation time, all existing users will be set to unrestricted.

When a user attempts to maintain (i.e. add, change or delete) an analysis code, the settings defined here will be used to ensure that they are authorized to do so at the BA/MA level of the analysis code being maintained.

Note: whilst access to this definition will be available on any user, the selections will only take effect if the user in question has been assigned the respective functions for add, change and delete of analysis codes.

Dashboards

Within **TemplaCMS** it is possible to construct several *Dashboards* (graphs/charts) based on several different areas of information, assigning these to a user will allow them access to the charts.
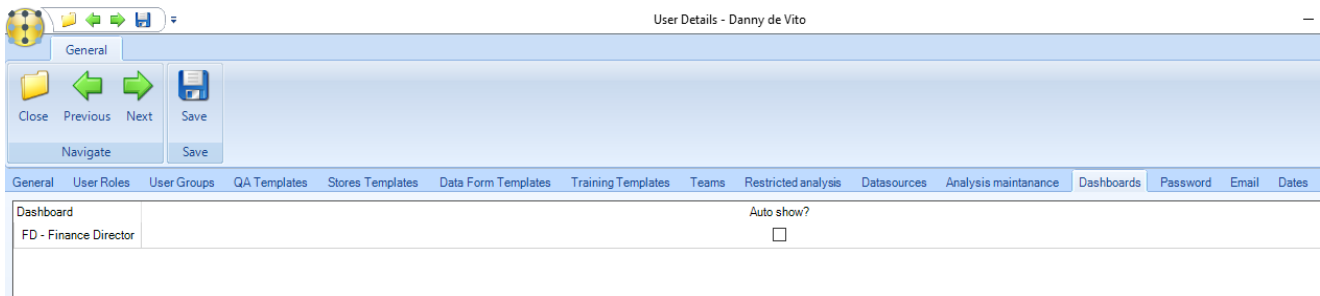
Set auto-show – when a *Dashboard* is assigned to the user it can be set to automatically appear when a user logs on. If the *Auto show?* box is unticked clicking this will button will enable auto-show, clicking it again will disable the function.
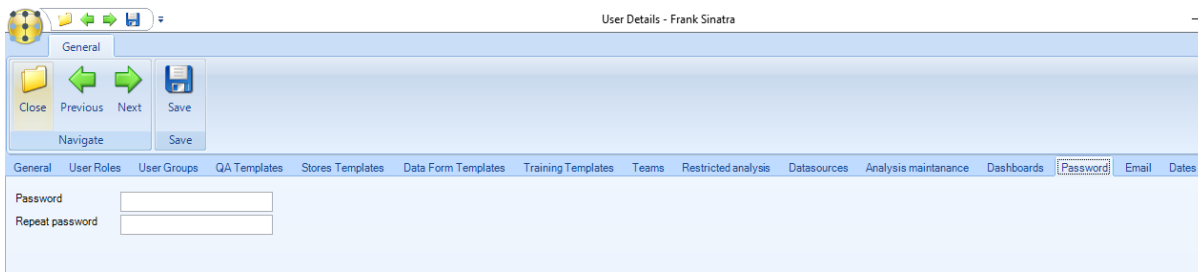
Passwords

This is the password that the user will need to access **TemplaCMS**.

Password – there are no restrictions on what a password can be set to, though it should be something memorable. This must be set for all new users.

Repeat password – this must match the password that was entered in the previous box, once both match and save is clicked the password will be applied.

Email

TemplaCMS allows email integration using MS/Outlook, directly via a network-based SMTP server or via the use of a web-based e-mail service, (e.g. Hotmail, Gmail, Office365, etc.) the configuration details of which are held in the application configuration file.

TemplaCMS allows optional user-level overrides to allow sending out e-mails directly from user accounts:
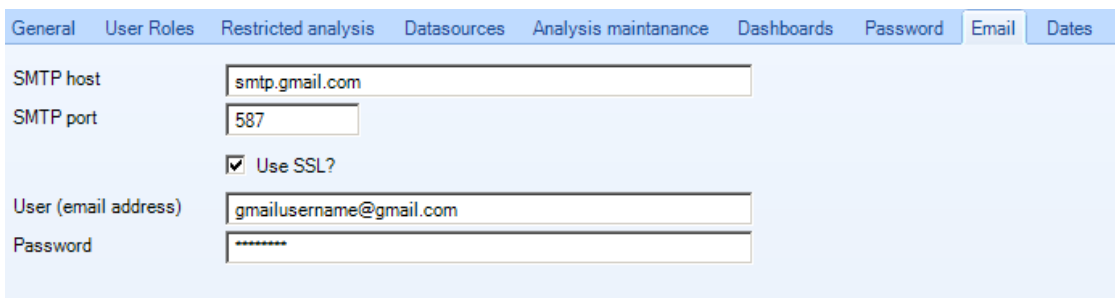
This will need to be the same for all users of the system and will be set up by **Templa** for all users that require it when the system goes live, for all new users that require emailing the details should either be copied from an existing user or obtained from the companies I.T company.

SMTP host – this is the server through which all emails from **TemplaCMS** will be routed.

SMTP port – for security reasons only some ports will be opened on the SMTP port, this must refer to a port that has been opened on the above host otherwise emailing will fail.

Use SSL? – SSL authentication is used on some SMTP servers as an extra layer of protection if this is ticked the following two fields will need to be populated.

SMTP user (email address) – if *SSL* authentication is used an email address that is approved will need to be entered here.

SMTP password – the corresponding password to the above *SMTP user* will need to be entered here, this is pre-set and not an opportunity for users to set a password.

Dates

Information with regards to the date & time as well as who created the user is automatically recorded on the dates tab. The same information is recorded when any changes are made to the user.
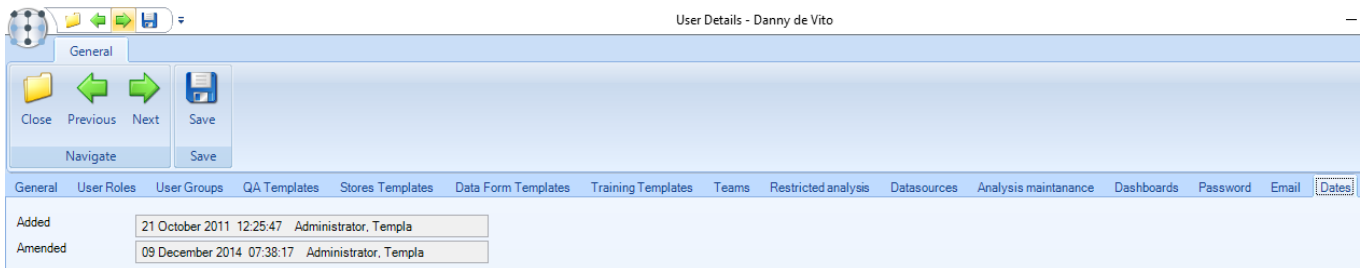

PERMISSIONS

Giving users access to certain areas and controlling which actions a user can take in those areas is very flexible in **TemplaCMS**. It is highly recommended to make any changes to a user in a test environment first before amending a live user.

Related *Functions* are grouped into *Function Groups* which are again grouped into *User **roles*** which are assigned to a user to control access and functionality.

Functions

Functions are accessible from the System Admin > Functions menu:
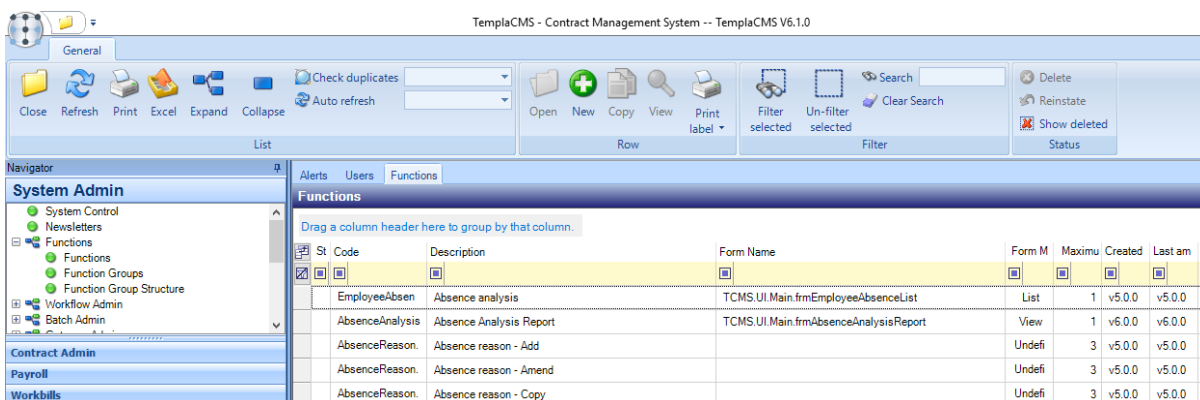

The *Functions* menu list all the different functions available across the system and can only be changed by **Templa**. The description of the function is fairly self-explanatory and give an indication of what the function allows the user to do. Further information with regards to the main form and version of **TemplaCMS** the function was introduced at is also displayed on the list.

Function Groups

All functions are grouped into logical Function Groups to control access. Groups preceded by an '*' are system function groups and cannot be changed.

All other function groups can be changed or amended by the System Controller and new function groups can be created where required.
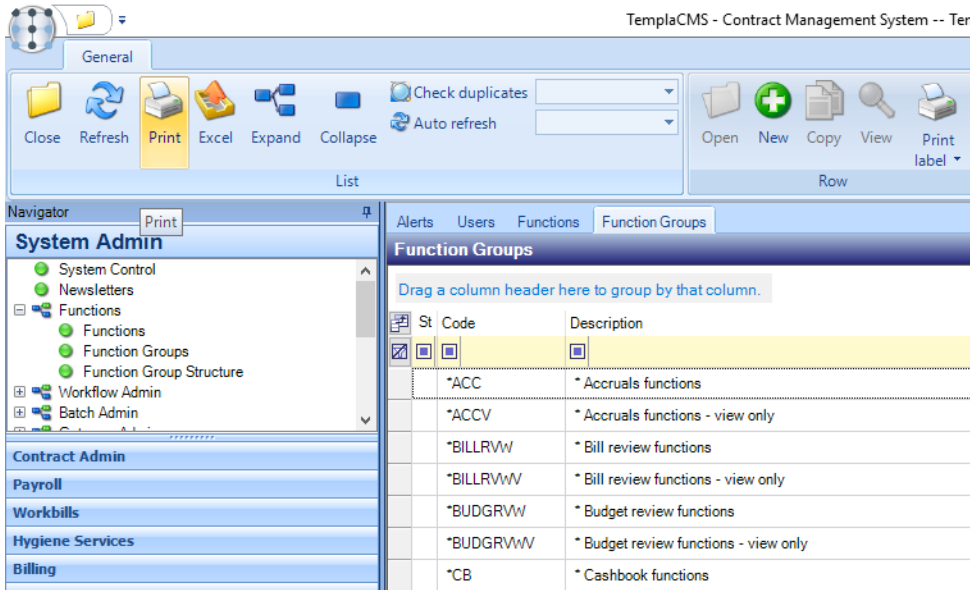
Once a function group has been defined, users can be restricted to certain *Function Groups* via *User Roles.*

Function Group Structure

The *Function Group Structure* gives an overview of the functions that make up a *Function Group*, as well as the version of **TemplaCMS** the function was released at.
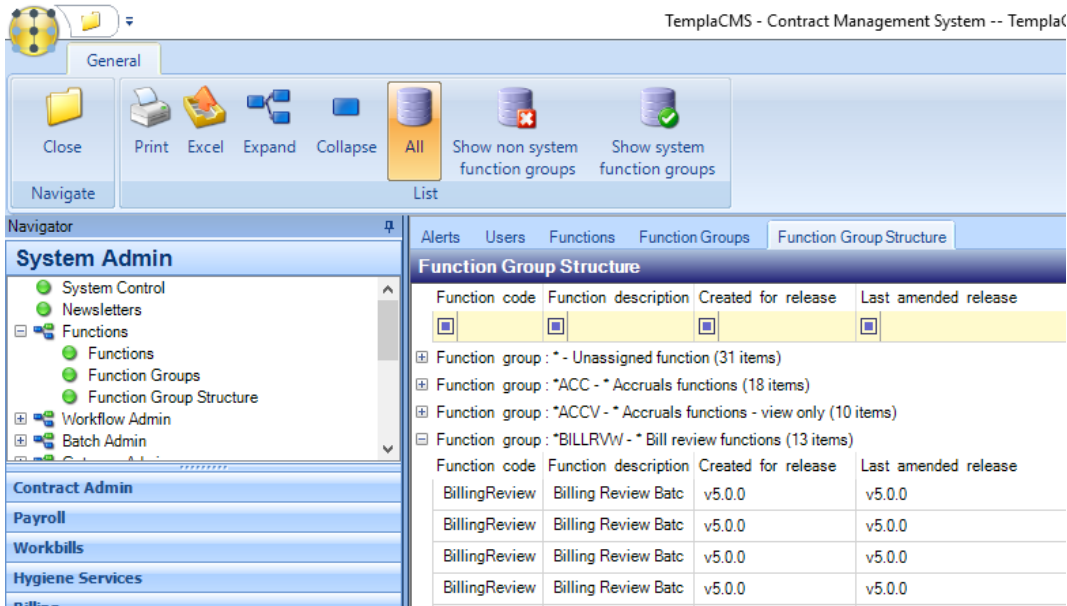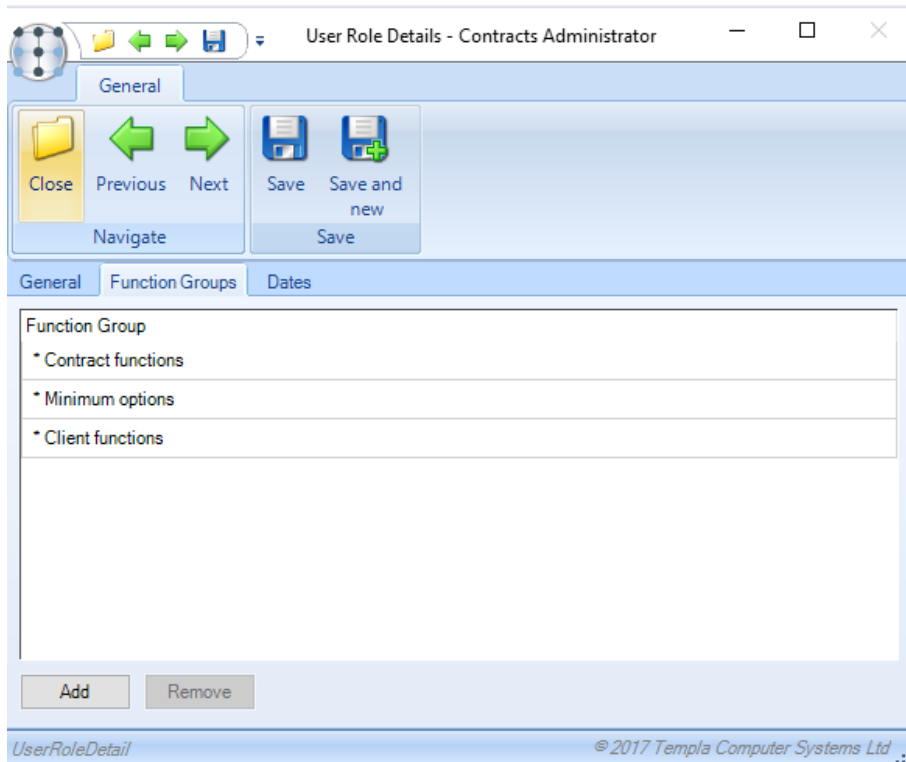
User Roles

User Roles can be found on the Maintenance > User Access/Security menu.

F*unction Groups are assigned to User Roles and therefore define which functions the user has access to.* For example, a user with a User Role of 'Contracts administrator' may have access to the following Function Groups:

- Minimum options
- Client functions
- Contract functions

User Roles are pre-defined by Templa and can be amended or new User Roles created if required.

User Groups

Individual *TemplaCMS* users can be grouped together, this is only applicable for the Customer Service module where the filter allows responsibility to be searched by user group.

Permission Structure

Due to the comprehensive nature of the user, datasource security and business analysis set up, the Permission Structure option gives an overview of the entire set up. These options display all users, user roles, functions, function groups, data security and business analysis restrictions and their relationships.
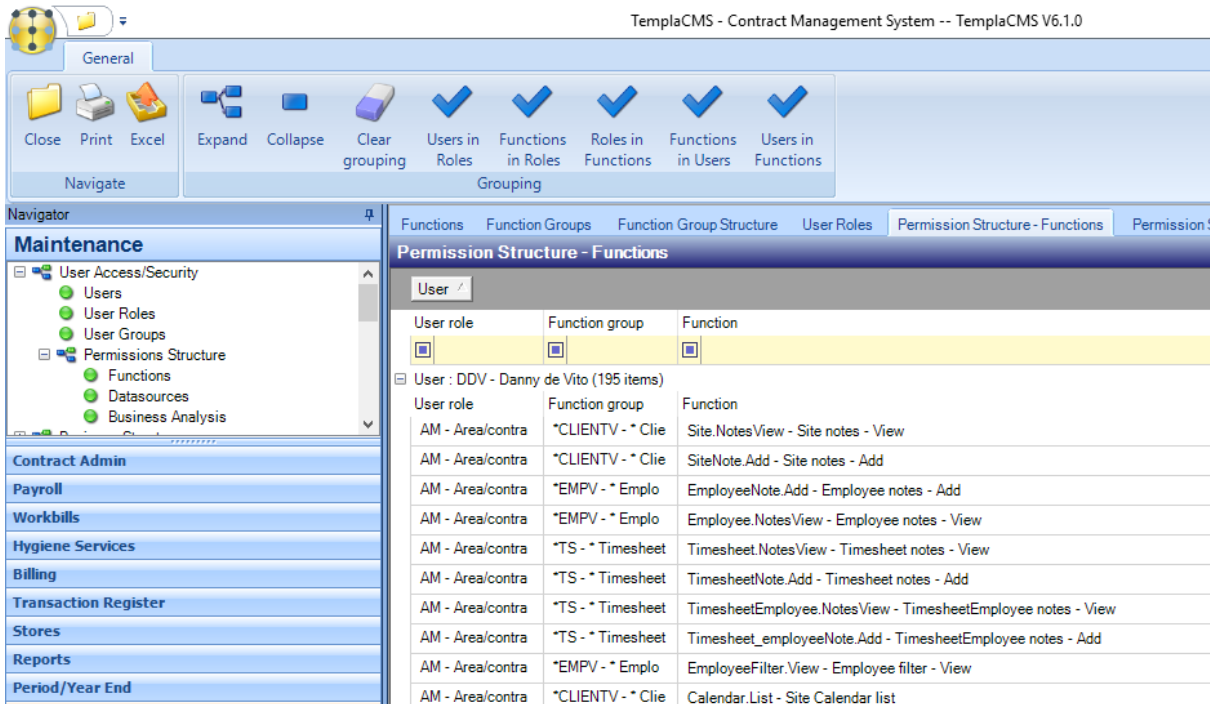
BUSINESS ANALYSIS

Analysis Codes

Business and marketing analysis codes can be created and amended from the *Analysis Codes* option available from the *Maintenance > Business Structure Analysis* menu:
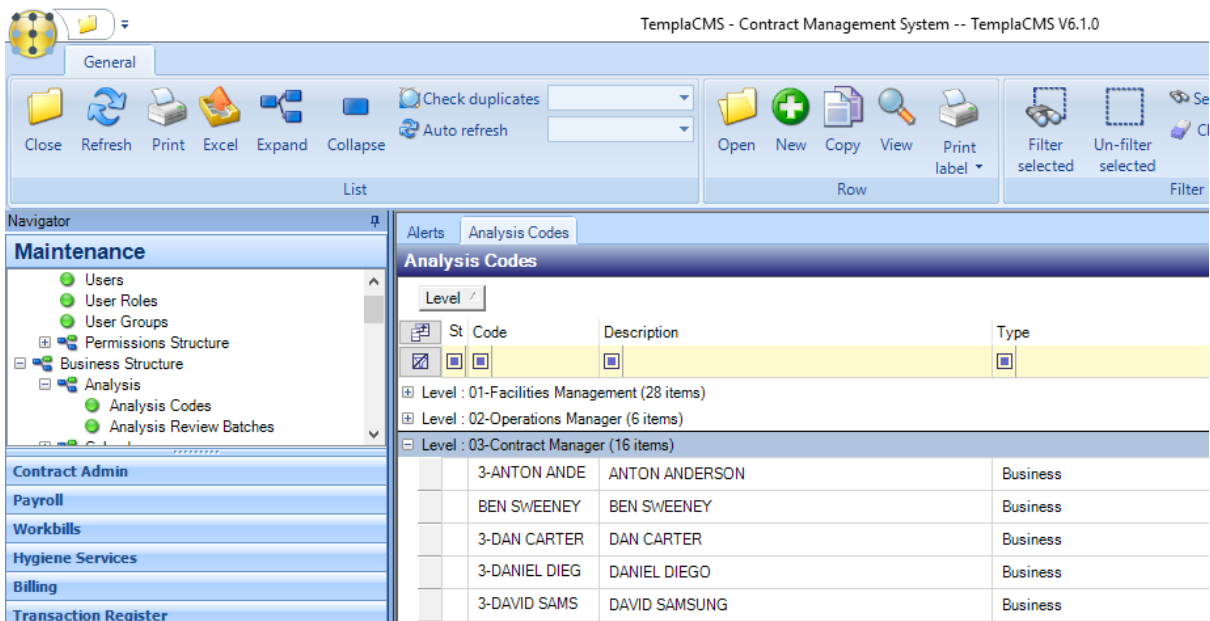
By default a list of all *Business Analysis codes* that have previously been set up within **TemplaCMS** will be displayed. The level that a code is created at will have implications for access permissions and reporting. All codes on this list are available for selection when setting up new sites.
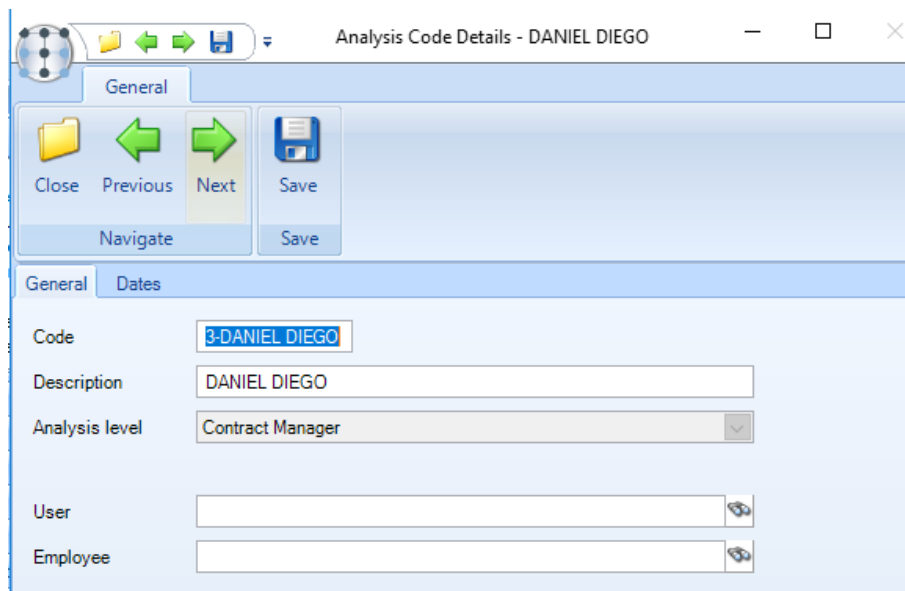
Please note that it is important that every *Analysis Code* defined is unique (the system will check when a code is entered and warn you if a code already exists). Once a code has been defined and assigned to a specific *Analysis level*, the level cannot be changed.

Analysis Code detail

Double click on an existing code or click on *New* to create a new analysis code:

Code – this must be a code that is unique across all analysis code levels.

Description – enter a relevant description.

Analysis Level – represents which level of the business this code will represent i.e. director, contract manager etc. These levels will be agreed prior to initial set up and input by Templa, these must never be changed without first consulting TEAM Software Support.

User (Optional) – it is possible to link each *Business Analysis* code to a specific user within **TemplaCMS** by clicking on the binoculars or typing in the user's description/ name.

NB: In order to route items to a user via workflow they must be linked to a business analysis code.

Site Analysis changes

Bulk changes can be made to the Site Analysis via the *Analysis Review Batches* option available from the *Maintenance > Business Structure > Analysis* menu.

To create a **Site Analysis Review Batch**, click on 'New' and complete the following details:

Reason – enter a reason for the change, for example 'Contract Manager left'.

Extraction > General tab

Client – if a specific client's analysis needs changing select the relevant client else leave blank.

Site - if a single site's analysis needs changing select the relevant site else leave blank.

Site address – enter if known, can be left blank if site is selected.

Site postcode – enter if known, can be left blank if site is selected.

Extraction > Analysis tab

Business Analysis – select the relevant Business Analysis code that will be changed for example 'Contract Manager – Dan Carter' as per above screenshot.

Marketing Analysis – if the Marketing Analysis is changed select the relevant code.

Analysis level – if the *Business Analysis* is being changed this should match the *Business Analysis* level chosen above.

New analysis – select the analysis code that will replace the existing code, for example as per the screenshot above 'George Wilson' will be replacing contract manager 'Dan Carter'.

** If the option to *'Enforce period control on analysis'* is enabled on *System Control* the following details will also need to be completed:

Effective details – purchase ledger – enter the date or period the change will take effect from on purchase ledger transactions.

Effective details – sales ledger – enter the date or period the change will take effect from on sales ledger transactions.

Effective details – nominal ledger - enter the date or period the change will take effect from on nominal ledger transactions.

On completion of the batch details click on *Save* to generate the batch. Once generated the user will be able to review the items that will be changed before posting the batch.

PROPERTY TYPES

It is possible to define a number of properties in **TemplaCMS** to record additional information against clients, sites, employees etc. like for example 'Disciplinary records'.

The *Permissions* tab on the *Property type* can be used to control user access via selecting one of the following options against the relevant *User role*:

- *Amend* – the user will be able add, amend and view the property type.
- *View* – the user will only be able to view the property type but not make any changes to it.
- *Exclude* – the user will not be able to view or amend the property type.
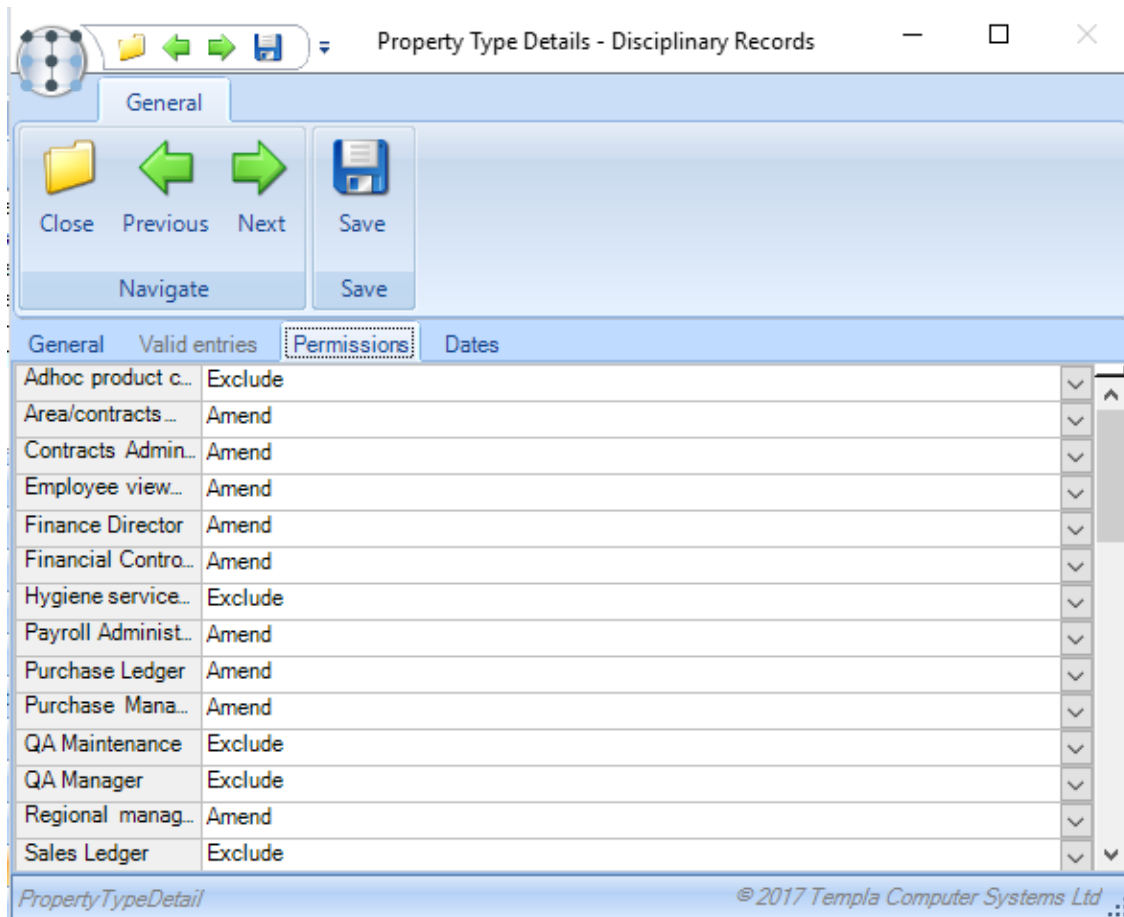
It is therefore possible to allow 'Payroll Administrators' access to 'Disciplinary' records and hide it from 'Contract Managers' for example.

ATTACHMENT TYPES

Attachments are available in a number of areas in TemplaCMS which enables a user to store an attached document and specify if the attachment relates to an employee, contract, site etc.

The *Permissions* tab on the *Attachment type* can be used to control user access via selecting one of the following options against the relevant *User role*:

- *Add* - the user will be able to add the attachment but not amend it once added.
- *Amend* – the user will be able add, amend and view the property type.
- *View* – the user will only be able to view the property type but not make any changes to it.
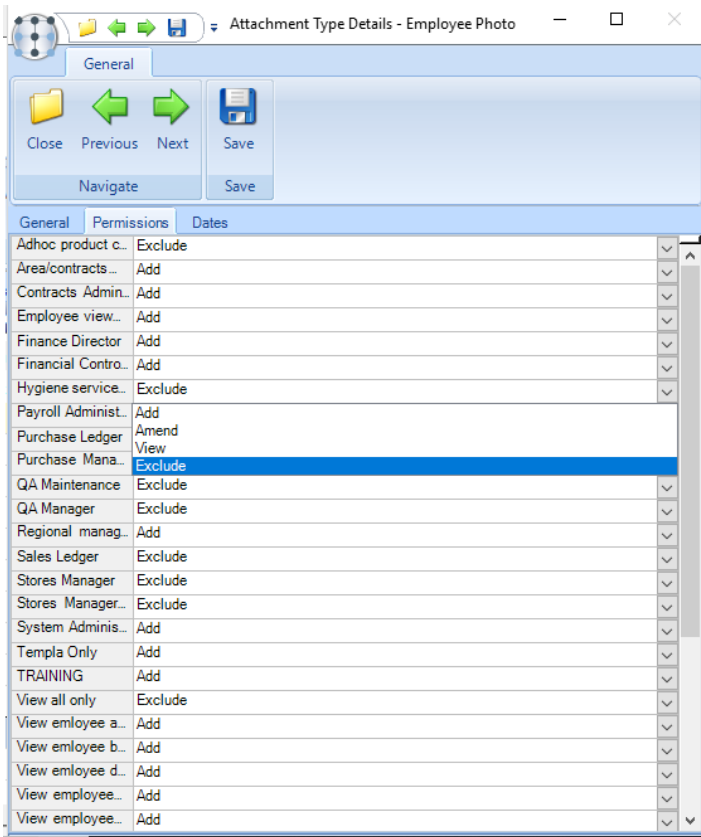- *Exclude* – the user will not be able to view or amend the property type.

It is therefore possible to allow 'Payroll Administrators' access to 'Disciplinary' records and hide it from 'Contract Managers' for example.

WORKFLOW

Workflow in **TemplaCMS** is used to create a direct link between a *user* and the *Business Analysis* level which enables the system to route items to a specific user for completion or approval.

Workflow path

From *Maintenance > Workflow > Workflow paths* choose the required workflow path from the list (if it exists).

If a new workflow path is needed, click on *New* and complete the following details:

Code – enter a code for the workflow path.

Description – enter a description that will clearly indicate what the workflow path will be used for.

Path type – select the relevant path type.

Transaction type – this field is used to enable users to categorize alerts so that they can be grouped into appropriate sections on the *Alert list* for example TS or SO for timesheets and stores orders respectively.

End of path status: Completed – this will be the status of the item when it has gone through all the stages defined on the workflow path.

End of path status: Rejected – this will be the status of the item if it hase been rejected at any stage on the workflow path.

Adding a stage

Paths can have many 'stages' to be traversed in sequence. Whilst on a stage, the item in workflow will be at an appropriate status.

If the required stage already exists double click to open it, if not click on *Add* and complete the following details:

Description – enter a description for this stage for example 'Timesheet awaiting completion'.

Status whilst on this stage – select the status that will be displayed against the item whilst it is waiting to be approved or completed etc.

Max iterations on route – determines how many times the item can be send through the route/routes defined on the stage.

Send assignment reminder (days) – enter the number of days a reminder should be sent to the user to action an item assigned to them.

Action type - this field is used to enable users to categorize alerts so that they can be grouped into appropriate sections on the *Alert list* for example 'Data entry'.

Email alert to assigned user? – when ticked an alert will be emailed to the assigned user when the item is routed to them for action.

Email alert to assigned user when sent back? - when ticked an alert will be emailed to the assigned user when an item that was sent for approval is sent back.

Rules

Rules define how items are processed as they pass through workflow, on most occasions the only check type will be *Authority required*. The user must enter a description for this.

NB: Where a workflow path is being set up for (for example Contract approval) TemplaCMS allow specific rules to be defined based on each element that can be amended on the contracts. The user should add each required rule as applicable, while following all other steps detailed in this guide.
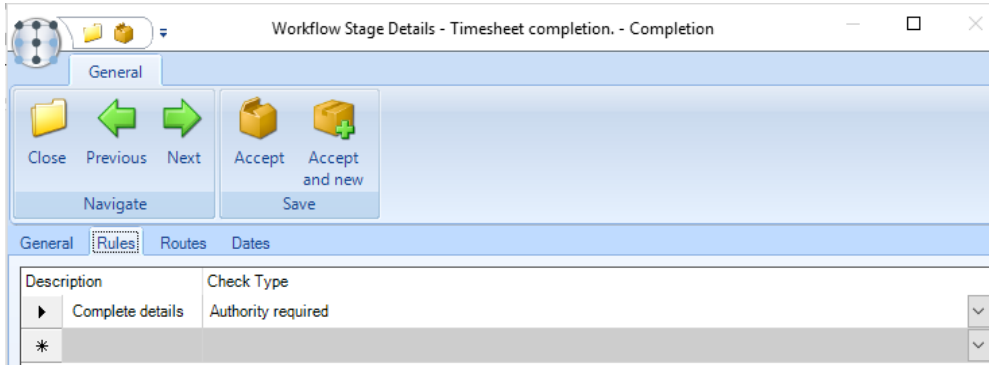
Routes

Routes are used to send workflow items e.g. Timesheets, QA's etc. to the correct user for completion or approval.

Click *Add* to create a new route or double click on an existing route to make an alteration.
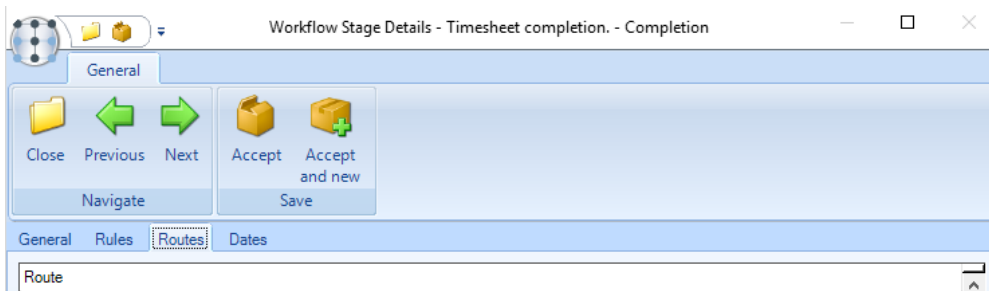
CONNECTING A ROUTE TO A BUSINESS ANALYSIS CODE

Enter a relevant description and then choose the business analysis level that applies to this route from the drop down e.g. *Area manager, Regional manager* etc. This will then filter the options shown when clicking the binoculars on the adjacent field to only codes which exist at that level, choose the code which corresponds to the user the route is being set up for.
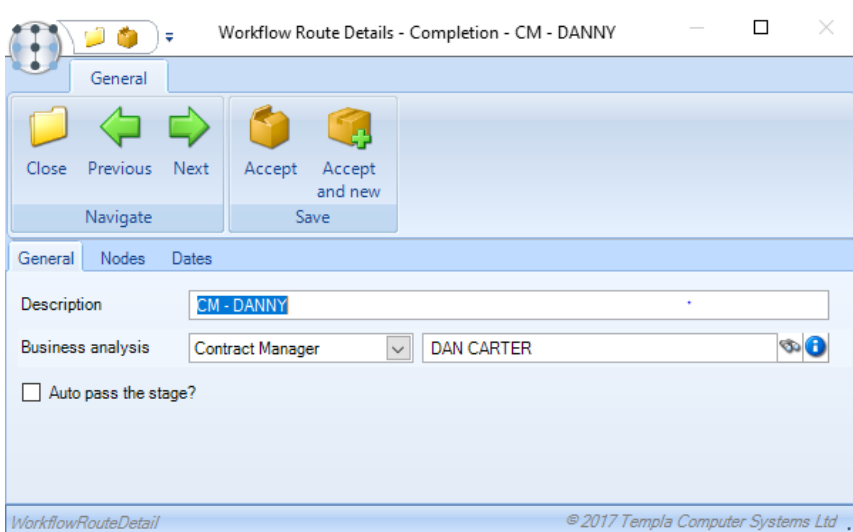
CONNECTING A ROUTE TO A USER

Nodes relate to the level of the user on the route e.g. the users on the lowest node will receive the workflow item and be responsible for its completion. Users on higher nodes will be able to view the items after they are assigned but are not responsible for completing them.
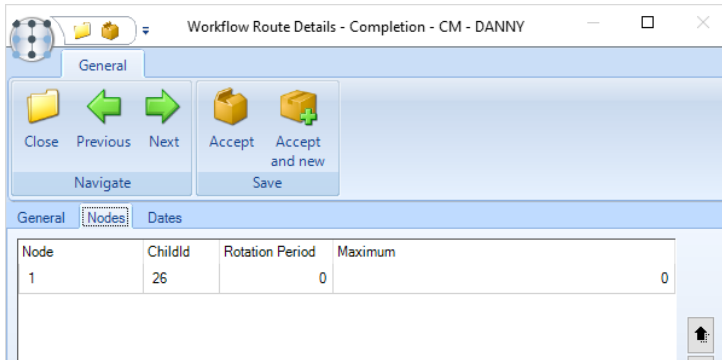
NB: Where multiple users exist on a node the items will be shared evenly between them i.e. One item to each.

Click Add or double click on an existing node to add/ change users.

Enter a relevant Description, all other fields can remain blank.
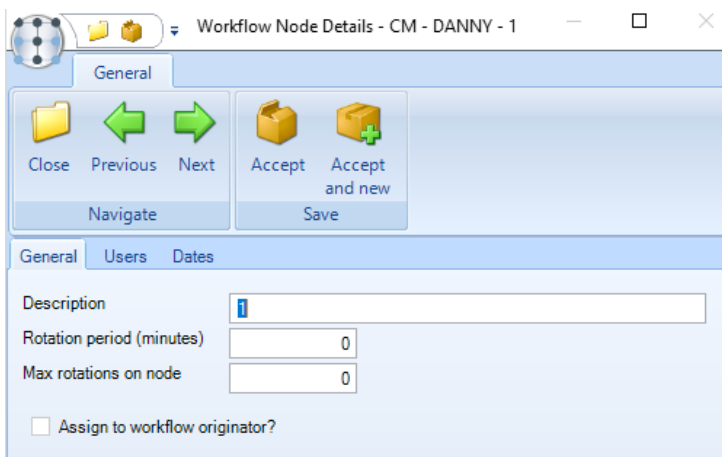
From the User tab click on *Add* to select a new user or highlight a user and click remove as necessary.
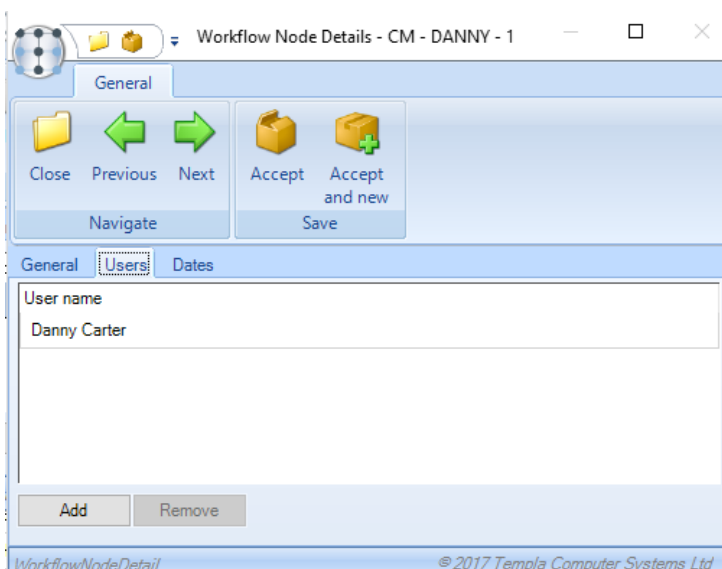
Once the correct user has been selected the user must click *Accept*.

After the required nodes have been added users will return to the Workflow route window, and should click *Accept* once all required routes have been added. Then click on *Accept* on the stages window, again after ensuring all required stages have been added. Once back on the *Workflow detail* window click on *Save*.

DEVICE REGISTRATION

From *System Admin > Gateway Admin > Device Registration* either create a registration by clicking *New* or alter an existing one by double clicking on it.
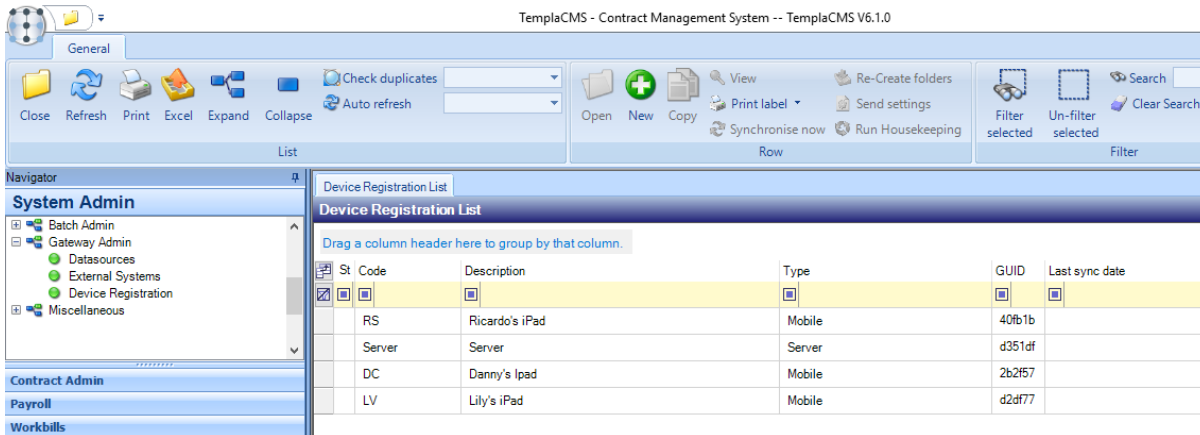
Device Registration Detail

On following screen complete relevant details:
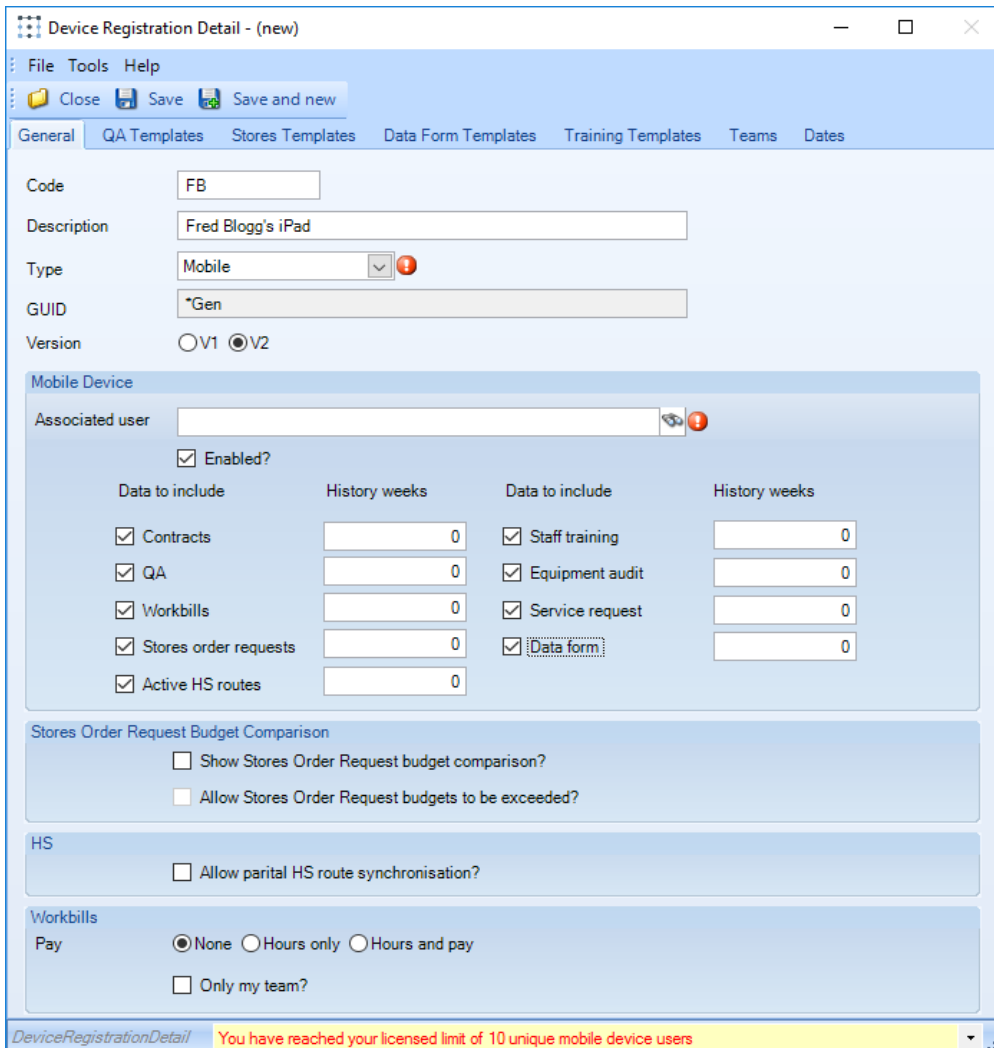
Associated user – this needs to be a valid TemplaCMS user

Note: one mobile device needs to be linked to one TemplaCMS user and thus a mobile device cannot be shared by more than one person.

Enabled – this needs to be checked prior to the first synchronisation – see below

Include data – these checkboxes control how much data is to be sent to the device:

- Contract – contract data is sent to the device, including site information
- QA – Quality Audits are sent to the device
- Workbill – workbills are sent to the device
- Stores order requests – stores orders are sent to the device
- Staff training – staff training forms are sent to the device
- Equipment audit – equipment audits are sent to the device
- Service requests – service requests are sent to the device
- Data form – data forms are sent to the device
- Active HS routes – HS routes are sent to the device

NB: apart from TemplaCMS contract-level functions (e.g. view budgets, view billing, etc.), TemplaCMS functions are not used on the CMS mobile devices, so the control of what appears is restricted to the associated user's restricted analysis and the above checkboxes.

History weeks – the number of past weeks of information to be kept on the CMS mobile device for each of the data items included.

NB: data sent from the TemplaCMS server will always overwrite data held on a mobile device. Any changes made on the mobile that had not yet been returned to the server would therefore be lost in this process.

Show Stores Order Requests budget comparison? – if 'Stores Order Requests' has been ticked, plus one stores budget has been flagged on System Control for inclusion on the mobile devices, then this can be triggered to be displayed here, plus a further control optionally added to 'Allow Stores Order Request budgets to be exceeded?'

HS: Allow partial HS route synchronization – if 'Active HS Routes' is ticked, part completed HS routes can be synced from the device.

Workbills: if 'Workbills' has been ticked, then:

- Pay – this control whether mobile device users can confirm the hours or the 'hours and pay' for employees completing non subcontractor workbills
- Only my team – this controls whether the mobile device user sees all workbills for all sites that he is authorized too or only those workbills for their team, as would likely be required for mobile teams that use the mobile device

Mobile device – templates

Within various areas of the mobile application, existing forms can be copied to create new forms, e.g. QA forms, SO requests, Data forms, Staff Training forms.

However, if a mobile device user needs to be able to generate a form for a site then the relevant templates need to be defined here via the relevant tabs, e.g. QA templates, etc.

NB: when templates are defined against a mobile device definition, the mobile device definition must also be flagged to show "**Contracts**" as otherwise the mobile application will not be able to build a list of sites / contracts for selection when a new form is required.

APPENDIX

The following sections deal with the relative steps required for a number of different scenarios. Details in brackets refer to sections of this guide that will help you when undertaking the tasks.

Scenario 1: new manager joining & replacing an existing manager

When a new manager needs to take on the full responsibilities of a departing manager there are a few steps that must be followed to ensure the new manager receives all of the data they require:

1. Create a new user for the manager (See "User Maintenance – General")
2. Create a new analysis code for the new manager ("Business Analysis – Analysis Codes") then:
    a. If all the departing manager's sites are to be transferred to the new manager, create an 'Analysis Review Batch' to reassign these sites ("Option 1: system-wide change using an "Analysis Review batch")
    b. If only some of the departing manager's sites are to be transferred to the new manager, update the relevant sites ("Option 2: single change, i.e. altering analysis at site level")
    NB: alternatively, the existing analysis details could be updated with the new manager's details but this would result in all historical site transactions (i.e. Site Analyser Reports) showing the new manager for all historic transactions.
3. Open the relevant workflow paths, i.e. Timesheet Completion and QA completion:
    a. If the departing manager has left, update the department manager's route ("Workflow – Routes") with the new manager's details
    b. If the departing manager has not yet left, add a new route ("Workflow – Routes") for the new manager
    NB: Alternatively, if the analysis was simply updated, then only the route description should be updated for clarity
4. If required and if the departing manager has left, open the device which is registered to the former manager, update its description and change the associated user to the new manager ("Device Registration – Device Registration Detail")

Scenario 2: re-assigning sites to a different manager

There are two ways to achieve this, depending on whether all sites for an existing manager need to be transferred to the new manager (option 1) or only certain sites (option 2). In either event, workflow routes will already exist for both managers so no changes should be needed to the workflow setup.

OPTION 1: SYSTEM-WIDE CHANGE USING AN "ANALYSIS REVIEW BATCH"

When all of a manager's sites need to be reassigned to another manager, this can be done in bulk from *Maintenance -> Analysis -> Analysis* review batch and clicking *New* and follow the below steps:

1. *Complete the 'Analysis Review batch' details:*
    a. *Reason* – enter a relevant description for the change
    b. *General tab* – can be left blank
    c. *Analysis* tab – select the manager that has left and requires changing
    d. *Analysis level* – choose the same business analysis level as above
    e. *New analysis* – select the new manager that will replace the one previously selected
2. Save and answer yes to the below:

Confirm action   ✕

❓ This new site analysis review requires generation.
   This will be carried out in the background, and you will be alerted when
   it completes.
   Continue?

                                        [Yes]   [No]
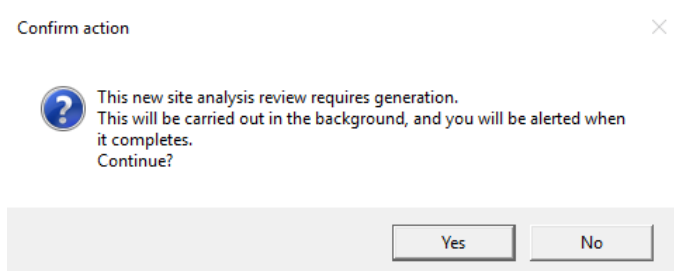
3. Once the batch has been generated (an alert has appeared) open the batch by double-clicking it.
4. **Review all of the changes that are to be made by clicking on *Site analysis review items.***
5. Once items have been confirmed as being correct click **Post**.

Site Analysis Review Batch - CM review   —   □   ✕

File Tools Help

📁 Close 💾 Save ⬅ Previous ➡ Next 📝 Notes

🖱 Site analysis review items ❌ Delete ✅ Post

| General |

Batch number   [7]

Reason   [CM review]

Extraction
| General | Analysis |

Client   [   ]

Client address [   ]

Client post code [   ]

Site   [   ]

Site address   [   ]

Site post code [   ]

Analysis level [Contract Manager   ▾]

New analysis   [Anne-Marie   ] ℹ
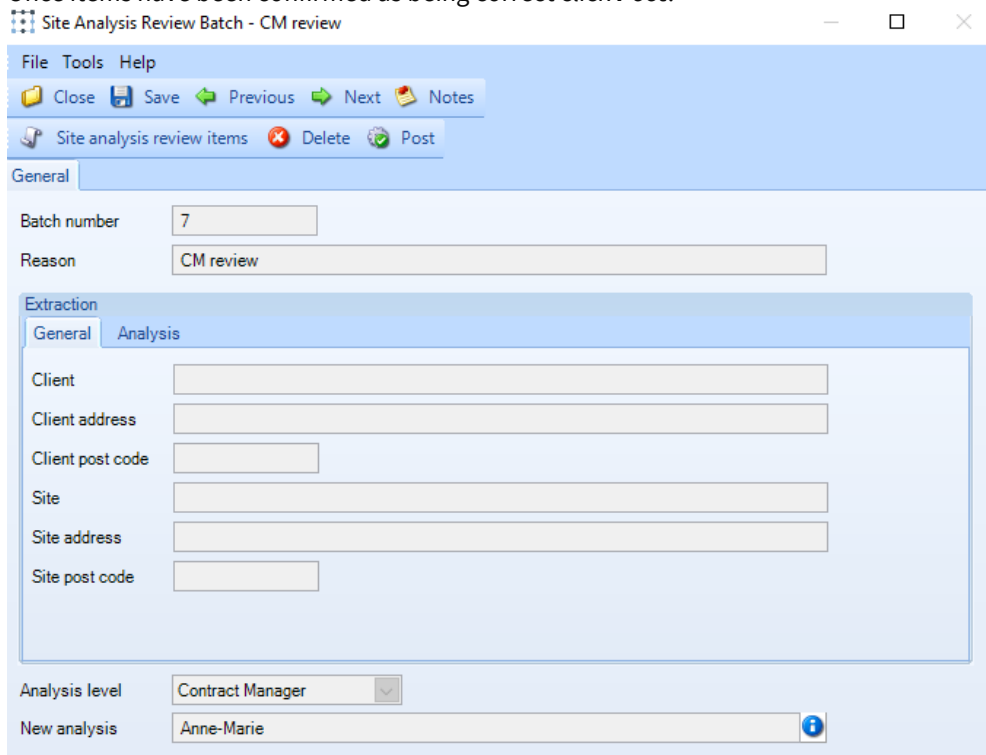
This will result in all sites being updated with the new manager's analysis code.

OPTION 2: SINGLE CHANGE, I.E. ALTERING ANALYSIS AT SITE LEVEL

Where a manager's sites need to be divided up between multiple new managers or only one or two changes are required these must be done one at a time, at a site level, on the business analysis tab by following the below steps:

1. Open the required site and go to the ***Business analysis tab:***
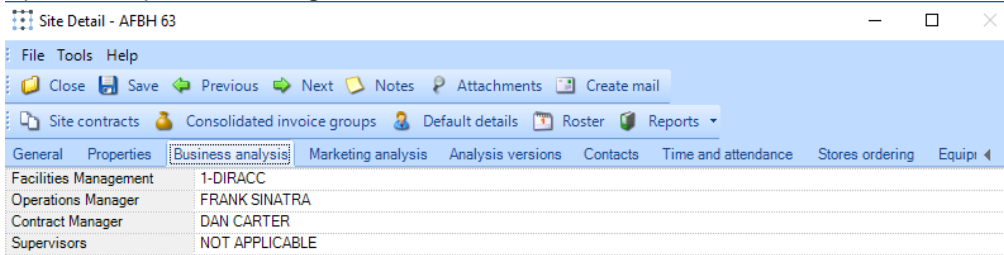
2. Click on the level that needs to be changed then either type in the new code or click on the binoculars and select the correct code from the list
3. Click **Save**
4. Repeat on all other sites where an alteration is needed.

NB: when either of the above analysis code changes are made these will only become active upon the generation of a new batch e.g. Timesheet, QA etc. This will therefore not re-distribute existing items based on any changes made so to achieve this, so a user with sufficient authority (i.e. access to the Workflow Manager) must reassign the items (i.e. timesheets, QAs, etc - not Workbills) as needed, via the **System Admin > Workflow Admin > Workflow Manager** option. This would also result in any QA's being re-distributed to the relevant mobile device; however, the existing items (i.e. QA's, Workbills, etc.) sent before the change) will remain on the original user's device until such a time as housekeeping has been run (either by the system or manually by a user).

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