

Employee Portal Set Up/Configuration

TEMPLACMS

Version: v.2 (CMS 6.1.0 – November 2020)



COMMERCIAL STATEMENT

This document and any work arising from customer acceptance of this document are subject to the terms and conditions of TEAM Software that can be found at teamsoftware.com/legal.

TABLE OF CONTENTS

INTRODUCTION	4
SCHEMATIC	5
INSTALLATION	5
Webserver Install.....	5
TemplaCMS setup	6
TECHNICAL REQUIREMENTS	6
Server.....	6
Client.....	6
TEMPLA-CMS CONFIGURATION	7
System Control.....	7
Gateway Admin	9
Workflow Admin	11
Maintenance.....	11
Service Point – Employee Portal.....	12
EMPLOYEE PORTAL	22
Logging in	22
Notices.....	23
Documents	23
My Pay.....	23
My Details	24
My Plan	24
My Requests.....	25
My Training.....	26
Contacts.....	27
Change Password	28
User-Defined Links	28
Log out.....	28

INTRODUCTION

The TemplaCMS Employee Portal system is a three-part application consisting of both a client and two server applications, all three of which will need to be installed as a single website.

- The client application is the front end of the system which the user will interact with using any web browser.
- The two server applications (SyncAPI and TemplaUI) communicate between the frontend client application and the TemplaCMS Employee Portal database, which retrieves its data.

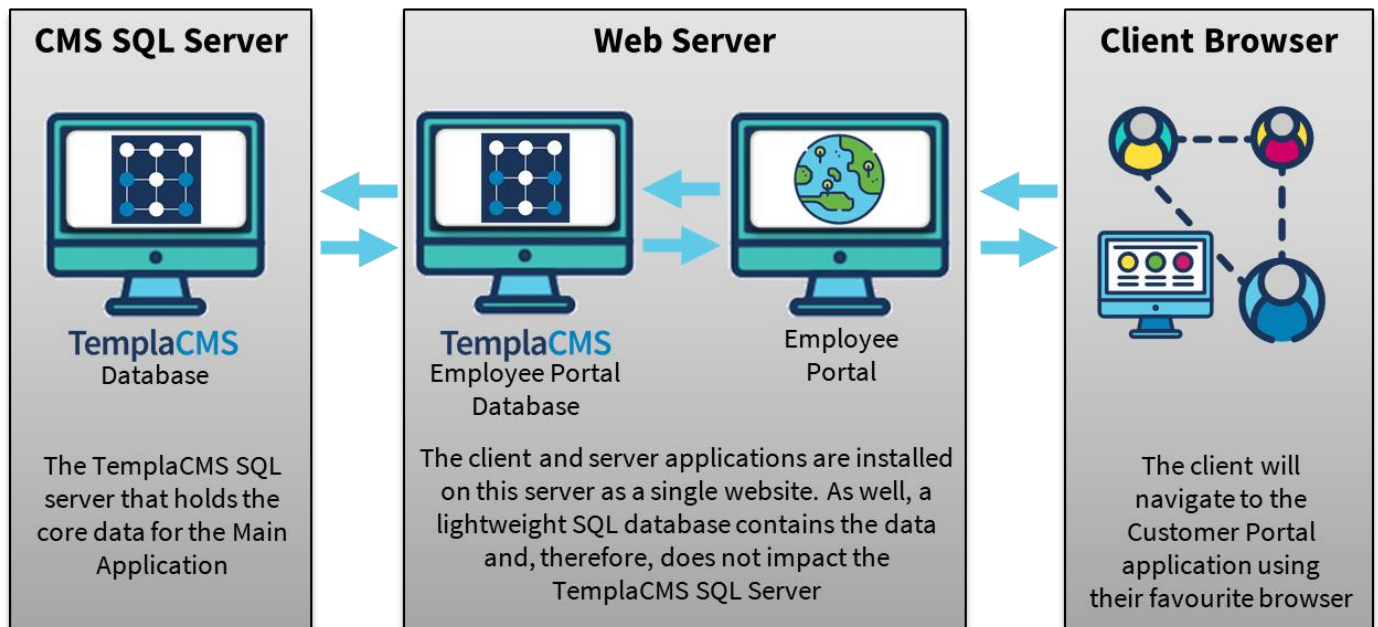
The setting up of a secure connection via HTTPS as such Templa recommend that an SSL certification is used and applied; port forwarding is also the responsibility of the client's IT department or their external IT support company.

The TCP port will also need to be opened up to allow the TemplaCMS Employee Portal application to be accessible from outside your network; this will also be the responsibility of the client's IT department

A SQL (Express) database is also required, which will contain employee's data. The data will be sent directly from TemplaCMS via the TemplaCMS Gateway windows service; the data is sent through to the SyncAPI application and sent back to the client application for the user to view and interact with. The employee data is sent out as soon as it is added into TemplaCMS whereas the payslips are sent out as soon as the pay period's period end is carried out.

For added security, all connections to the server application require a valid authentication ticket that TemplaCMS provides once the user has successfully logged on to the TemplaCMS Employee Portal application. If a connection is detected without a valid authentication ticket the connection is severed

SCHEMATIC



INSTALLATION

See notes in **S:\PRODUCTS\Templa-CMS\Templa-EP\EPInstall.xlsx**

Webserver Install

The following steps need to occur:

1. Make sure the server is enabled for ASP.NET 4.6
2. Download and install 64bit .NET CORE from <https://dotnet.microsoft.com/download/dotnet-core/2.2>
NB: make sure you install the 'Runtime and hosting bundle', NOT the SDK
You may need to re-start IIS after doing this"
3. Copy the zip files (Client, ClientAPI and SyncAPI) from the relevant version of EP to the IIS server
4. In ..\inetpub\ create a folder for EP (something like TemplaEP_Test)
5. Create a sub folder of this called 'EventLog' with sub folders of 'ClientAPI' and 'SyncAPI'
6. Unzip the files in turn, and rename 'publish' as Client, ClientAPI and SyncAPI
7. Your folder structure should be something like this:
 - ▼ **TemplaEP_Test**
 - > Client
 - > ClientAPI
 - ▼ EventLog
 - ClientAPI
 - SyncAPI
 - > SyncAPI
8. Open **web.config** in ClientAPI and SyncAPI folders, and set the Initial Catalogue (database name) connection as relevant and the event path
9. Open **appsettings.json** in the Client folder, and set the URL to the ClientAPI endpoint
10. Launch IIS and create a new website bound to your desired port and pointing at the above TemplaEP_Test\Client folder (Templa UI)
11. This will create a new app pool. Open the pool and set the .NET CLR to v4
12. Now add 'web applications' to this website, for ClientAPI and SyncAPI, pointing to their respective folders
13. Open SQL server and make sure it's security is set to mixed mode
14. Add a SQL user matching the setup in your web.config (not need if integrated security is true)

15. Attempt to browse to ClientAPI - this should create the SQL database, then go to it's default page - check the DB is created
16. Browse to SyncAPI - it will go direct to it's default page
17. Now, browse the main website - you should get the EP login.

TemplaCMS setup

The following steps need to occur:

1. Define external system with URLs to ../SyncAPI and user/password details
2. Setup external system folder structure
3. System control EP - define admin user/pwd in line with external system - saving this will sent settings to EP
4. From EP menu on navigator, review and define relevant 'types'
5. On UDPs, define which should be enabled for EP (EE UDPs only)
6. On absence reasons, define which should be enabled for EP
7. Workflow - paths need to be defined for EP change and EP requests.
NB: THEY MUST BOTH FORCE STOP, as otherwise they cannot be applied
8. Payroll datasources - tick which are enabled for EP
9. "For test purposes, update all EEs to be 'disabled on EP' :
update ex set ex.IsDisabledOnEmployeePortal = 1 from EmployeeExtensions ex where
ex.IsDisabledOnEmployeePortal = 0"
10. From external system - force sync of EP
11. ...wait for it all to sync

IMPORTANT

- "The export of payslips automates the SelectPay CR. This must be run as 32bit.
- Make sure the server has the CRRedist2008_x86 installed, set class BLPayBatchPayslipExport to run on it's own queue, launching this as 32bit."

TECHNICAL REQUIREMENTS

Server

The following items need to be installed on the server that is hosting the TemplaCMS Employee Portal:

- Microsoft IIS (preferably above version 7)
- SQL server – given the volume of data in Employee Portal, the free to use SQL Express edition should be sufficient. Including SQL Management Studio
- ASP.Net 4.6
- .Net CORE hosting

Microsoft IIS must be installed on at least one server. IIS will host both the client and server applications - IIS version 7 is recommended, however, version 6 is acceptable.

Microsoft SQL Express is required to host the TemplaCMS Employee Portal database; SQL Express 2016 or above can be used, the database must be accessible by the TemplaCMS Employee Portal server application, with Mix authentication mode enabled.

When an employee attempts to log into the system for the first type they will be sent an activation code via email (where the employee has an employee), therefore we suggest that this is caused when deploying a new server.

Client

TemplaCMS Employee Portal has been designed to be available across all major browsers; although still accessible, due to functionality on the Employee Portal, Internet Explorer browser are not recommended. Additionally, although use on mobile phone and other small handle devices is possible it is suggested to use a laptop/desktop PC or a larger size mobile device.

TEMPLA-CMS CONFIGURATION

TemplaCMS Employee Portal is configured to allow all employees access by default.

System Control

SYSTEM SET-UP > EMAIL PREFERENCE

Within system control, there is an option to set out the email body to the employee once requests have been Completed/Rejected/Cancelled and Employee Change applied/rejected

Document type	Subject	Body	Body HTML	Overriding sender email address	Request read receipt?	Email from CS?
Employee Request Applied	Employee request - Accepted	The below request has been approved &OE			<input type="checkbox"/>	<input type="checkbox"/>
Employee Request Rejected	Employee request - Rejected	The below request has been rejected &OE			<input type="checkbox"/>	<input type="checkbox"/>
Employee Request Cancelled	Employee request - Cancelled	The below request has been cancelled &OE			<input type="checkbox"/>	<input type="checkbox"/>
Employee Change Applied	Employee details change - Accepted	Your request to change your details has been accepted &OE			<input type="checkbox"/>	<input type="checkbox"/>
Employee Change Rejected	Employee details change - Rejected	Your request to change your details has been rejected &OE			<input type="checkbox"/>	<input type="checkbox"/>

EMPLOYEE PORTAL

The screenshot shows the 'System Control - Employee Portal' configuration window. It has a 'General' tab selected. The window is divided into several sections:

- General:** Includes 'Close', 'Save', and 'Navigate' buttons.
- Passwords:** Fields for 'Minimum length' (6), 'Minimum alpha's' (1), 'Minimum numerics' (1), 'Expiry days' (365), and 'Re-use versions' (1). Checkboxes for 'Case sensitive?', 'Require mixed case?', and '2-step login (via email)?'. A 'Suspend for' field set to 15 minutes after 3 failed log in attempts.
- History:** Fields for 'Request history', 'Pay history', 'Site activity', and 'Training history', each with a 'weeks' unit.
- Details change proof (image):** Checkboxes for 'Required for personal changes?', 'Required for contact changes?', 'Required for bank changes?', and 'Required for property changes?'. An 'Attachment type' dropdown set to 'Employee General'.
- Other:** 'Auto disable leaver after' field set to 30 days. Checkboxes for 'Check pro-rata on requests?' and 'Email employee on new pay record?'. A 'Login URL' field.
- Administrator:** 'Login code' field set to 'admin' and a 'Password' field with masked characters.

At the bottom, it says 'SystemControl_EmployeePortal' on the left and '© 2020 Templa Computer Systems Ltd' on the right.

General:

Minimum password length: This allows the user to define the minimum password length.

Minimum alpha's: Minimum alphabetical characters required within a password.

Minimum numeric: Minimum numerical characters required within a password.

Expiry days: This setting allows the user to define how many days each client password is valid for (if after the expiry date the client tries to log in to TemplaCMS Employee Portal they will be forced to change their password).

Password re-use versions (Max 5): This setting allows the user to define how many password versions the system will store (e.g. if the user set this to three the system will store the last three passwords the employee has used. When the employee is asked to change their password, it will be checked against the stored passwords and if the new password has already been used then they will need to try setting another password).

Case Sensitive?: This controls where the password should be case sensitive or not.

Require Mixed Case?: Where selected this will enforce the employee to create a Password to have a mix of case

2-Step Login (via email): This is a formal of 2-step authentication for the employee. Where an E-mail is defined it will send a code to the employee to authorise their entry. This code is valid for 10 minutes.

Suspend for: This setting identifies how long the employee has to wait before they can reattempt login after the set number of attempts.

Administrator Login code/Password: Administrator Login details and password. This needs to be set up on the server as well. This should **never** be changed without Templa's knowledge.

Auto disable leaver after: This is the duration in days an employee can continue to login to their portal after their employment leave date

Request history: This is how far back the employee can access their history of read Notices and Documents.

Pay history: This is how far back the employee can access their history of Payslips and P60's.

Site activity: When sending Notices and Documents to specific sites the notice will be sent to all employees allocated to the relevant sites. This option will also send the Notices or Documents to employees who are not allocated to the site but have worked on the site within the number of weeks specified.

Check Pro-rata on requests: If the checkbox is ticked, when a holiday request is checked within Employee Portal the employee's pro-rata entitlement will also be checked, and if the employee is over their entitlement they will be presented with details. The user (employee) may still save the request even when they are over their entitlement.

Email employee on new pay record: When new payslips or P60s are ready for an Employee Portal enabled employee, the document is automatically uploaded to Employee Portal.

Login URL: When using the 'Email employee on new pay record' you can automatically send a URL link to the employee so they can log into the Portal.

Please see below details on configuring the email preferences.

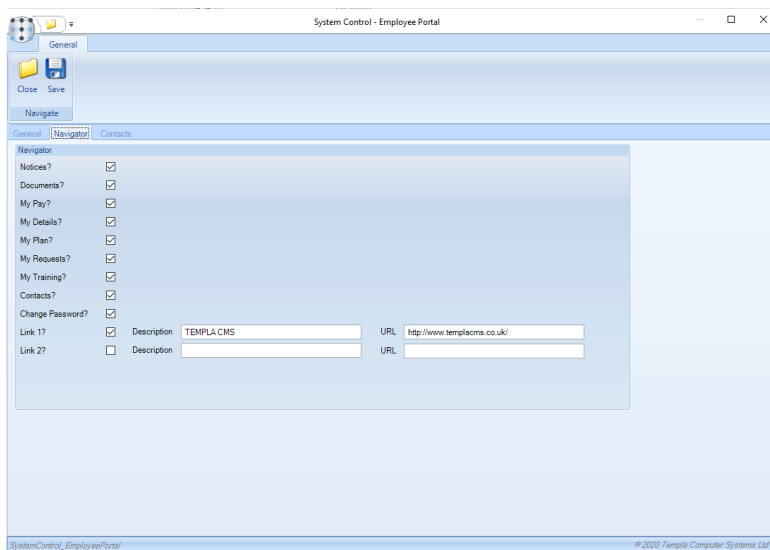
Details change Proof (image):

Required: Depending on the area of change, it is now possible to require the user to upload an image (e.g. a scanned bank statement) as proof of authenticity.

Attachment Type: When an employee uploads a document, to add some proof to the request to change details about themselves. The document that is uploaded will be saved again the Changes as 'Proof' of the change.

Navigator

The Navigator tab allows users to customise the option available to the employees when they have logged into the portal.



Notices: This is the notice board for the employee i.e. allowing direct notices to be supplied across the business or for specific employees.

Documents: This is a way to send documents i.e. employee handbooks etc direct to the employee.

My Pay: This section contains; Payslips, Paysheets, P60s and any other documents that are uploaded. These will be downloadable for the employee.

My Details: This area allows the employee to see their details and update them.

My Plan: This allows the employee to see their approved/remaining holiday days/hours for each site.

My Requests: This shows the employee a list of Holiday or Absence requests that are approved/are awaiting approval

My Training: This will allow the employee to carry out remote training via short videos with a question and answer section to ensure the employee has understood and learnt the training.

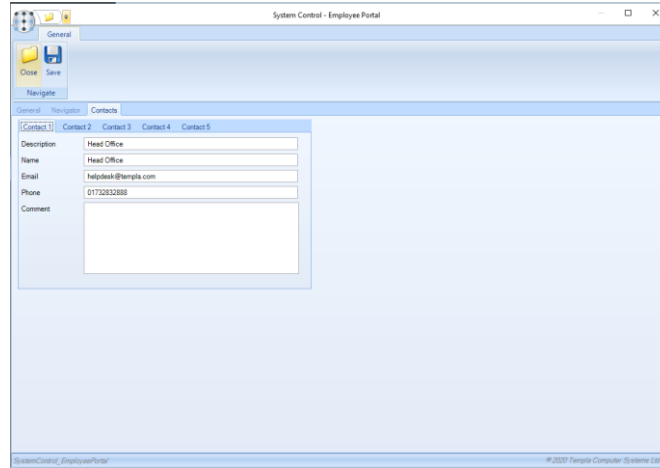
Contacts: This allows the employee to see the nominated contacts for the company and the sites they work on

Change Password: This allows the employee to change their password when they are logged into the employee portal already.

Links 1&2: This allows you to link the employee to a separate website, i.e. a training website. The Description is what is displayed on the Portal and the URL is the website that will take the employee too when clicked.

Contacts:

The contacts tab allows for company-wide contacts to be configured; the system allows for 5 contacts to be set up



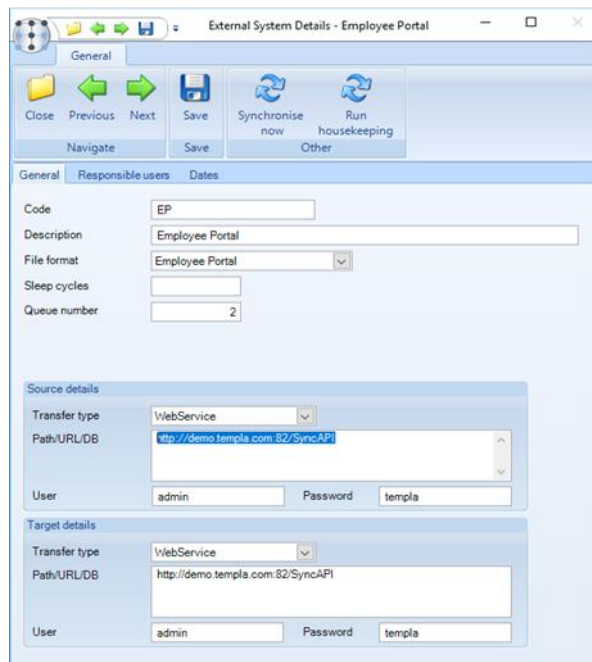
Description: This is a description that will be shown to the employee

Name: This is the individual/Teams name that may be contacted but can be generic i.e. Head Office

Gateway Admin

EXTERNAL SYSTEMS

Templa will configure an external system for Employee Portal. This has a very minimal amount of configuration; however, a responsible user(s) should be configured by a System Administrator, this will alert the nominated user if any connection failures occur.



Code: Unique identifier

Description: Description of the Employee Portal External System

File format: Select Employee Portal from this predefined drop-down list

Sleep cycles: The amount of ‘polling’ cycles that are skipped. By default, this should not be changed without advice from Templa.

Queue number: A separate queue will be generated and configured to run just the Employee Portal thus not to delay in any information being sent to the Employee Portal.

Source Transfer type: Select Webservice from this predefined drop-down list

Source Path/URL/DB: This is the URL of the website such as ‘Demo.Templa.com’ followed by the SyncAPI

Source User/Password: This will be configured by Templa and should **NOT** be changed.

Target Transfer type: Select Webservice from this predefined drop-down list

Target Path/URL/DB: This is the URL of the website such as ‘Demo.Templa.com’ followed by the SyncAPI

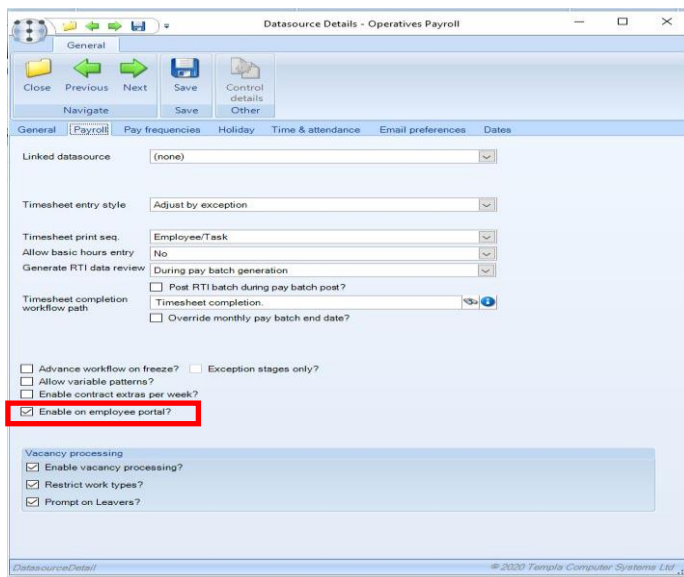
Target User/Password: This will be configured by Templa and should **NOT** be changed.

Selecting **Synchronise Now** will force all data to be transferred to the Employee Portal data and should **only** be used with the advice from Templa’s Support Team

Selecting **Run Housekeeping** will force the overnight housekeeping process to run. Thus, allowing the TemplaCMS User to remove redundant data on the website. However, although an option has been configured for this it is strongly recommended to allow the system to process the housekeeping job overnight thus not slow down the use for the TemplaCMS system within office hours.

DATASOURCES

Within Gateway Admin > Datasource, on a payroll Datasource, an additional option has been added on to the Payroll tab to ‘enable on employee portal?’. Selecting this option will enable the employees to log in.



Email Preferences:

It is also possible to set the email settings based on datasource, thus allowing you to send email to employees under different email accounts and varying messages if required.

Overridden	Document type	Subject	Body	Body HTML	Overriding sender email address	Request read receipt?	Email from CS?
<input type="checkbox"/>	Employee Request Applied	Employee request - Accepted	The below request has been approved &DE			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee Request Rejected	Employee request - Rejected	The below request has been rejected &DE			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee Request Cancelled	Employee request - Cancelled	The below request has been cancelled &DE			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee Change Applied	Employee details change - Accepted	Your request to change your details has been accepted &DE			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee Change Rejected	Employee details change - Rejected	Your request to change your details has been rejected &DE			<input type="checkbox"/>	<input type="checkbox"/>

Workflow Admin

For a TemplaCMS user to be able to action (apply or reject) a change of details or employee request, there must be a qualify workflow path created.

EMPLOYEE CHANGES

Templa have created a new path type within the workflow paths for EP Change Approve. For information regarding Workflow set up please see the **CMS Manual - User setup and maintenance.docx**

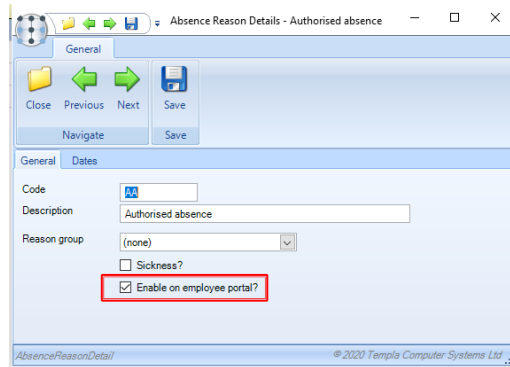
EMPLOYEE REQUEST

Templa have created a new path type within the workflow paths for EP Request Approve. For information regarding Workflow set up please see the **CMS Manual - User setup and maintenance.docx**

Maintenance

ABSENCE REASONS

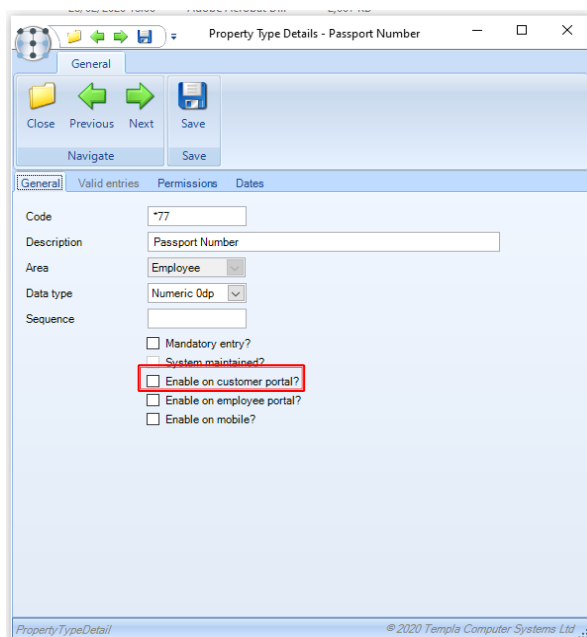
As a part of the employee portal, employees can send in absence request, as such absence reasons need to be made possible for the employee can select. Therefore, a new 'Enabled on Employee Portal Document has been created'.



For information regarding Absence Reasons set up please see the **CMS Manual - Maintenance.docx**

PROPERTY TYPES

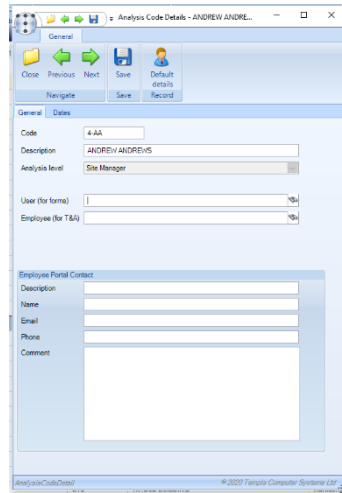
Information such as DBS number etc may be gained by the HR/Payroll and stored separately on an employee's record under Properties. TemplaCMS allows these to be export to the Employee portal. This will allow the employee to update such details so there may be properties that you do not want to be enabled on the portal.



For information regarding Property Types set up please see the **TemplaCMS Maintenance Manual**

BUSINESS ANALYSIS

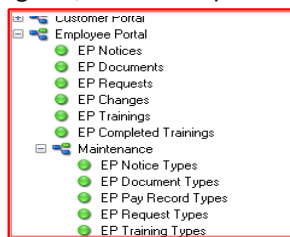
Within the business analysis, it is possible to define the contact details for each analysis codes. As such you can define the contact details for each Manager etc:



For information regarding Analysis codes set up please see the **CMS Manual - Maintenance.docx**

Service Point – Employee Portal

Within the Service Point navigator, here is an option of Employee Portal which contains all the relevant details:



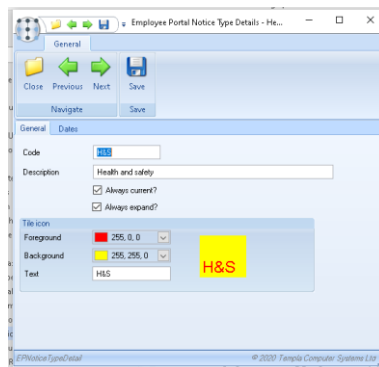
EMPLOYEE PORTAL MAINTENANCE

With the Employee Portal Maintenance option, there a couple of option

EP Notice Types

This manages the tiles within the Notices window. Within this option, you will be able to add, amend or delete the tiles. A maximum of 10 tiles can be used.

When doing so, the Notice Type Details window will open whereby the following options are available:



Code: This is the unique identifier

Description: The description of the tile

Always Current: Any notices via this tile will remain in the Unread page despite the notice being read or not

Always Expand: Any notices via this tile will automatically open when the employee views the individual tile or in the all list.

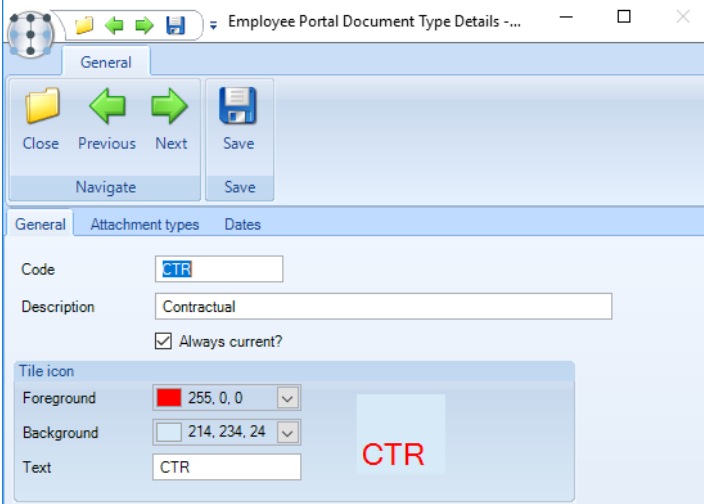
Tile icon Colours: Set the icon colours

Text: Short text to be displayed on the tile. It is recommended this does not exceed 3 characters

EP Document Types

This manages the tiles within the Document window. Within this option, you will be able to add, amend or delete the tiles. A maximum of 10 tiles can be used.

When doing so, the Document Type Details window will open whereby the following options are available:



The screenshot shows the 'Employee Portal Document Type Details' window with the 'General' tab selected. The window has a title bar with a soccer ball icon and standard window controls. Below the title bar is a 'General' tab with navigation buttons: 'Close', 'Previous', 'Next', and 'Save'. Below these are 'Navigate' and 'Save' buttons. The main content area has three tabs: 'General', 'Attachment types', and 'Dates'. Under the 'General' tab, there are fields for 'Code' (containing 'CTR'), 'Description' (containing 'Contractual'), and a checked checkbox for 'Always current?'. Below this is a 'Tile icon' section with 'Foreground' (red, 255, 0, 0), 'Background' (light blue, 214, 234, 24), and 'Text' (CTR) fields. A preview of the tile icon shows the text 'CTR' in red on a light blue background.

Code: This is the unique identifier

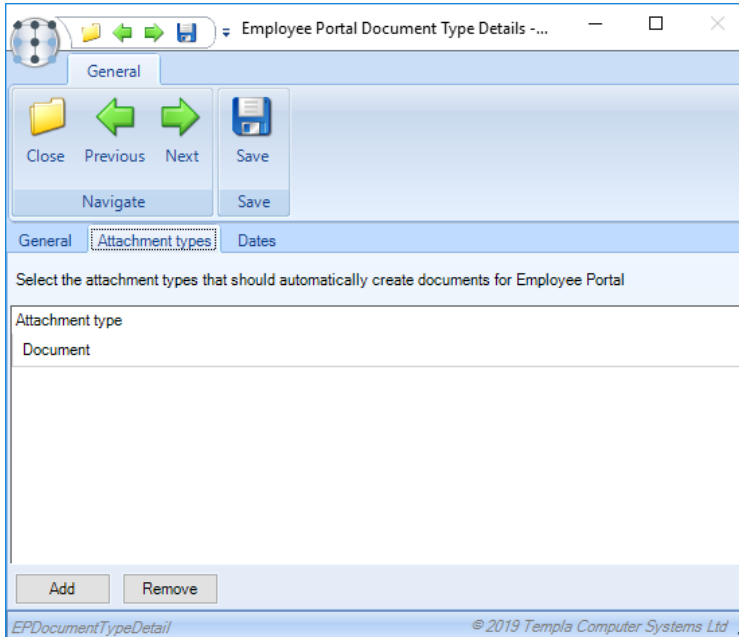
Description: The description of the tile

Always Current: Any notices via this tile will remain in the Unread page despite the notice being read or not.

Tile icon Colours: Set the icon colours

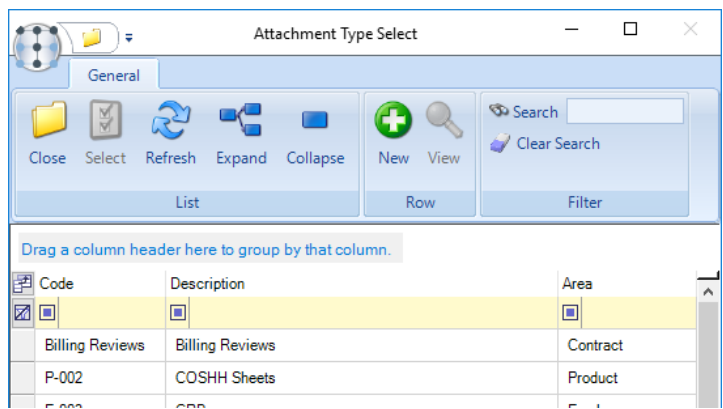
Text: Short text to be displayed on the tile. It is recommended this does not exceed 3 characters

The Document Type also has an Attachment type Tab.



The screenshot shows the 'Employee Portal Document Type Details' window with the 'Attachment types' tab selected. The window has the same title bar and navigation buttons as the previous screenshot. The main content area has three tabs: 'General', 'Attachment types', and 'Dates'. Under the 'Attachment types' tab, there is a heading: 'Select the attachment types that should automatically create documents for Employee Portal'. Below this is a list box containing 'Attachment type' and 'Document'. At the bottom of the list box are 'Add' and 'Remove' buttons. The footer of the window contains the text 'EPDocumentTypeDetail' and '© 2019 Templa Computer Systems Ltd'.

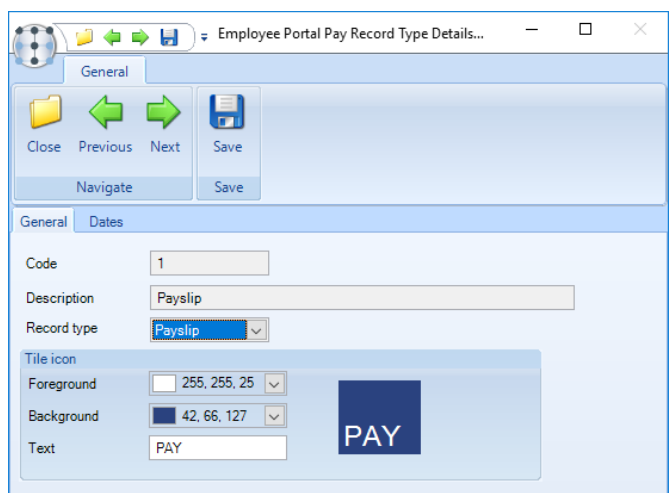
Within here you can add and remove attachments types by selecting the relevant button. When adding the Attachment Type window appears which allows selection of the attachment



EP Pay Record Types

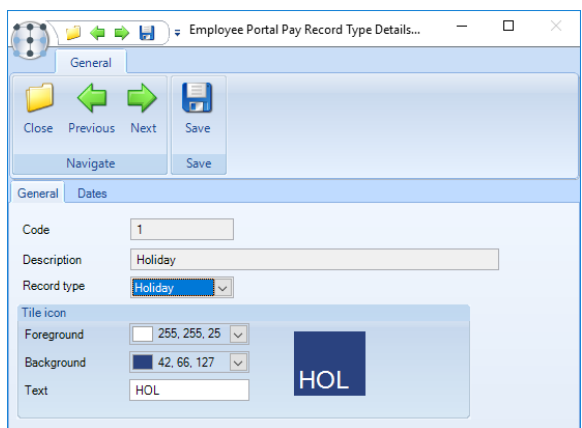
This manages the tiles within the Pay Record Type window. Within this option, there will be three predefined types of Payslip, Paysheet and P60 by default the 'Pay Sheet' will be flagged as deleted. The only item you will be able to amend here is the Foreground, Background and the Text option

It is recommended that the text option does **not** exceed more than 3 characters.



EP Request Types

This manages the tiles within the Request Type window. Within this option, there will be two predefined types of Holiday and Absence. The only item you will be able to amend here is the Foreground, Background and the Text option.

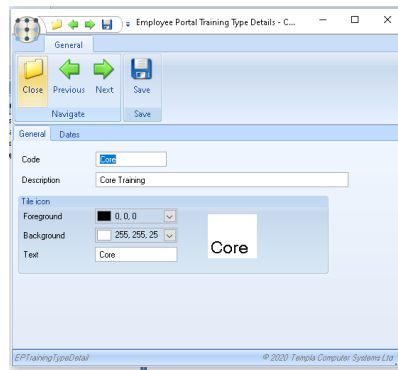


It is recommended that the text option does not exceed more than 3 characters.

EP Training Types

This manages the tiles within the Training window. Within this option, you will be able to add, amend or delete the tiles.

When doing so, the Training Type Details window will open whereby the following options are available:



It is recommended that the text option does not exceed more than 3 characters.

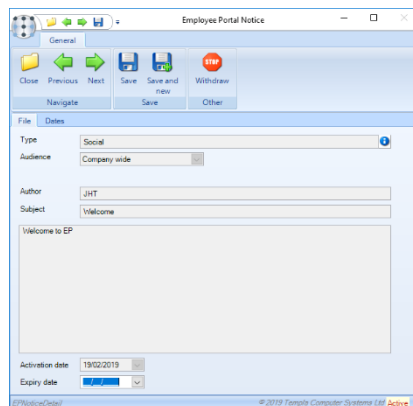
EMPLOYEE PORTAL – PROCESSING AND COMPLETING

Within the options under Employee Portal, these allow you to define the details to be issued to the employees for each of the EP Types

EP Notices

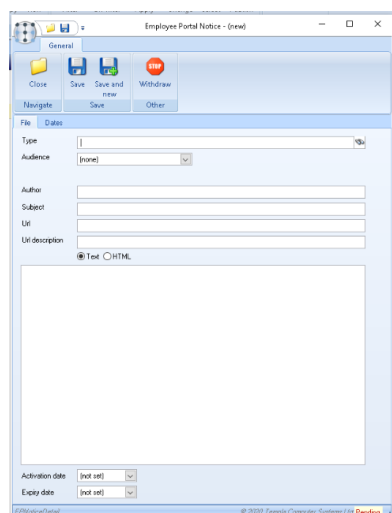
This option will list the Employee Portal Notices. Within this option, you will be able to add a new Notice or either view, amend expiry date or Withdraw an existing Notice.

To add New, select the New button or Copy an existing Notice or double click on an existing Notice to amend/Withdraw.



When working on an existing Notice all the fields are greyed out except for the Expiry date. Changing this will define when the Notice is to expire. This can then be saved. Alternatively, you can Withdraw the Notice which will remove this immediately from the relevant Employees Portal.

When adding a new or copying an existing Notice all fields can be edited.



Type: Defines the Notice Type

Audience: The defines who will receive the Notice. Options are:

(none): this is the default. Until an Audience has been selected the Notice will remain at status “not assigned”

Client: This Notice will go to Employees who work for that specific Client. When selecting this option, a further cell will appear to select the Client

Company-wide: This Notice will go to all Employees

Employee: This Notice will go a specific Employee. When selecting this option, a further cell will appear to select the Employee

Payroll: This Notice will go a specific payroll. *When selecting this option, a further cell will appear to select the payroll data source.*

Site: This Notice will go to Employees who work for that specific Site. When selecting this option, a further cell will appear to select the Site

Author: Free text to define whom this Notice originates from

Subject: Free text to define the subject of the Notice

Notice Type:

Text: If selected the user will need to enter details into the ‘Notice Detail’ text box

HTML: If this is selected, you can then upload a Word document to be converted into HTML, thus allowing for pictures, text formatting etc to be used.

Notice Detail: Main area to display the Notice detail

Notice Document: This option is only available if HTML is selected.

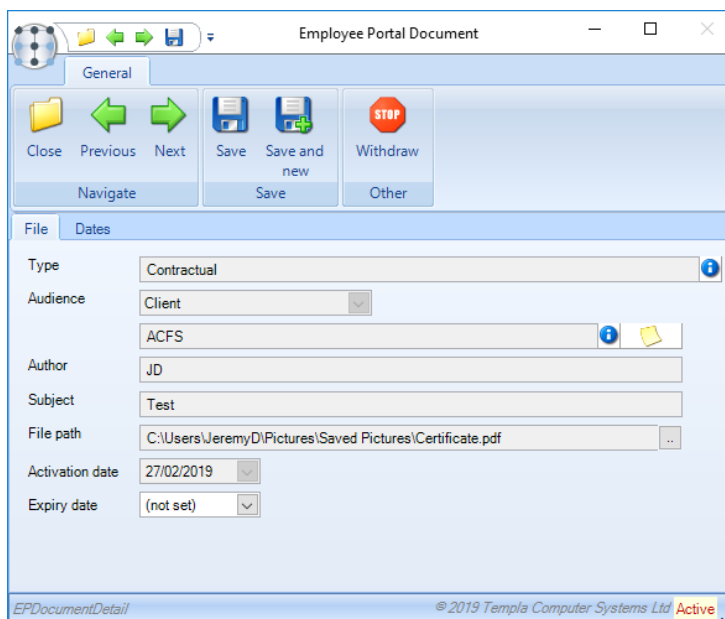
Activation date: When the Notice will start to appear from the employee’s portal

Expiry date: When the Notice will no longer be available on the employee’s portal

Withdraw: This will instantly remove the notice from the portal.

EP Documents

This option will list the Employee Portal Documents. Within this option, you will be able to add a new Document or either view, amend the expiry date or Withdraw an existing Document.



The screenshot shows a web application window titled "Employee Portal Document". The interface includes a top navigation bar with icons for Close, Previous, Next, Save, Save and new, and Withdraw. Below this is a "File" section with a "Dates" tab. The form fields are as follows:

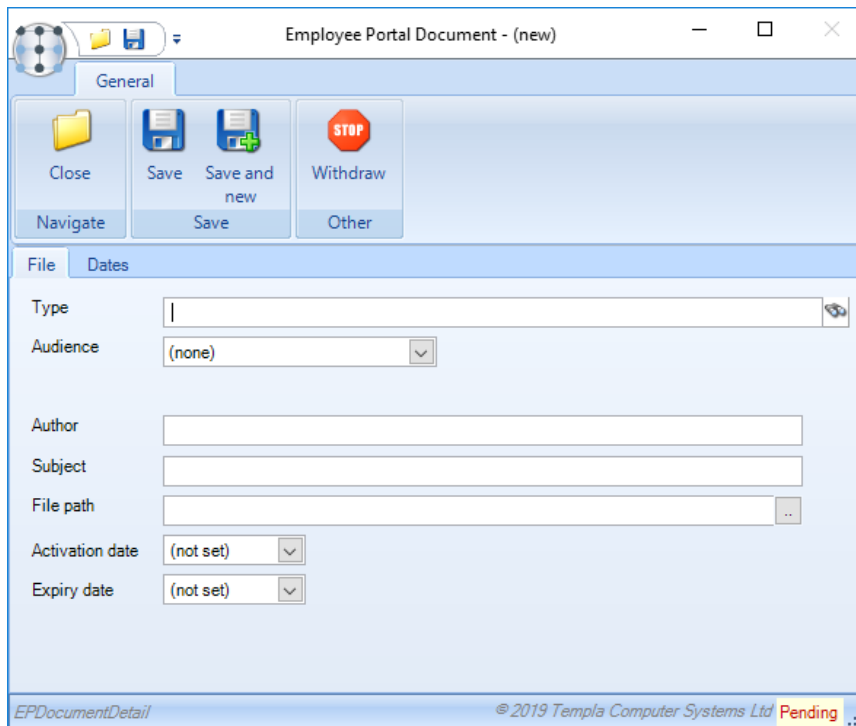
Type	Contractual
Audience	Client
Author	ACFS
Subject	JD
File path	C:\Users\JeremyD\Pictures\Saved Pictures\Certificate.pdf
Activation date	27/02/2019
Expiry date	(not set)

At the bottom of the window, there is a footer that reads "EPDocumentDetail © 2019 Templa Computer Systems Ltd Active".

To add a New Document, select the New button or Copy an existing Document or double click on an existing Document to amend/Withdraw.

When working on an existing Document all the fields are greyed out except for the Expiry date. Changing this will define when the Document is to expire. This can then be saved. Alternatively, you can Withdraw the Document which will remove this immediately from the relevant Employees Portal.

When adding a new or copying an existing Document all fields can be edited.



The screenshot shows a web application window titled "Employee Portal Document - (new)". The window has a "General" tab selected. Below the tab are several buttons: "Close", "Save", "Save and new", and "Withdraw". The "Withdraw" button is a red octagon with a white "STOP" sign. Below the buttons are two tabs: "File" and "Dates". The "Dates" tab is active, showing several fields: "Type" (text input), "Audience" (dropdown menu with "(none)" selected), "Author" (text input), "Subject" (text input), "File path" (text input with a browse button "..."), "Activation date" (dropdown menu with "(not set)" selected), and "Expiry date" (dropdown menu with "(not set)" selected). At the bottom of the window, there is a status bar with "EPDocumentDetail" on the left, "© 2019 Templa Computer Systems Ltd" in the center, and "Pending" on the right.

Type: Defines the Document Type

Audience: The defines who will receive the Document. Options are:

(none): this is the default. Until an Audience has been selected the Document will remain at status “not assigned”

Client: This Document will go to Employees who work at the site(s)for that specific Client. When selecting this option, a further cell will appear to select the Client.

Company-wide: This Document will go to all Employees, where the database is flagged to be enabled on employee

Employee: This Document will go to a specific Employee. When selecting this option, a further cell will appear to select the Employee.

Payroll: This Document will go a specific Employee. When selecting this option, a further cell will appear to select the payroll data source.

Site: This Document will go to Employees who work for that specific Site. When selecting this option, a further cell will appear to select the Site.

Author: Free text to define whom this Document originates from i.e. Templa Support Team

Subject: Free text to define the subject of the Document

File Path: click on the far-right to trigger file explorer to open to allow you to select the file to attach. Note, only PDFs can be added as an attachment

Activation date: When the Document will start to appear from the employee’s portal

Expiry date: When the Document will no longer be available on the employee’s portal, once the date is reached.

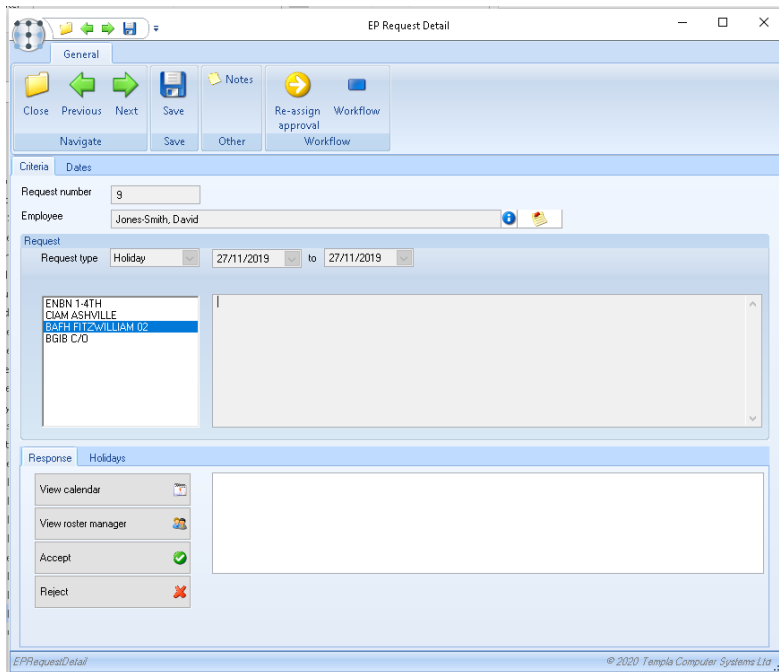
Withdraw: This will instantly remove the Document from the portal.

EP Requests

Any request made by Employee will follow the workflow path.

This option will also list the Employee Portal Request. Within this option, you will be able to view and approve Employee Request subject to the workflow.

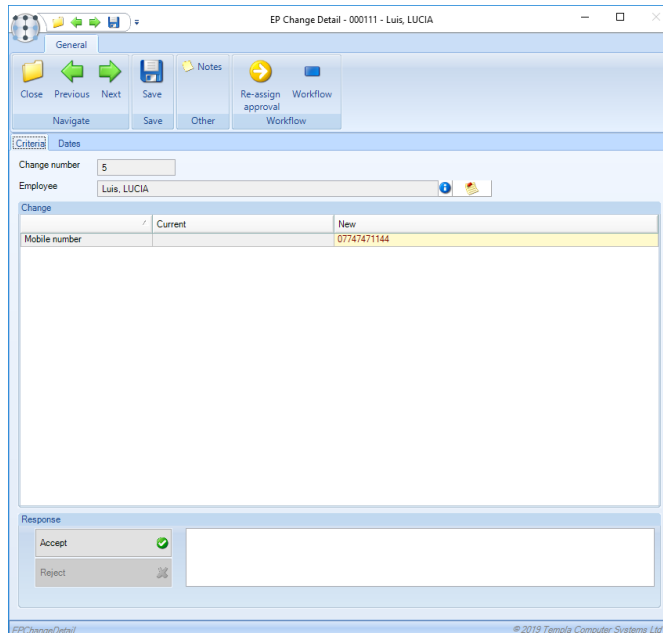
To access the request, double click on the request.



EP Changes

Any changes made by Employee will follow the workflow path. This option will also list any Employee Portal Changes request by the employee. Within this option, you will be able to view and approve Employee Changes subject to the workflow.

To access the Change, double click on this Change.



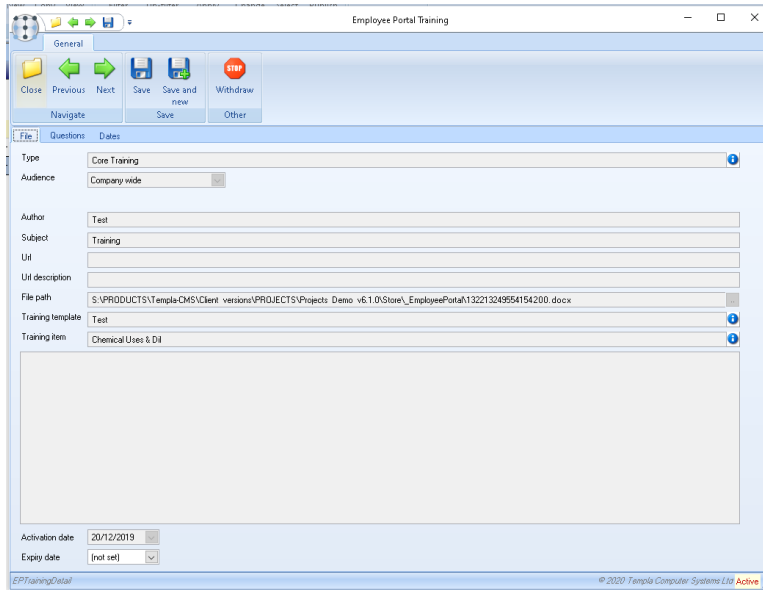
The EP Change Detail screen is displayed. It shows the field which is being requested to change, in this instance "Mobile Number", the current value and the new value. If this change is acceptable, please press Accept.

Once accepted this change will be made on to the Employees portal.

If the change of details needs to be rejected, i.e. proof not relevant/unclear etc, the user that is rejecting the change will need to enter a rejection comment.

EP Training

This option will list the Employee Portal Training. Within this option, you will be able to add a new training section or either view, amend expiry date or Withdraw an existing Document.



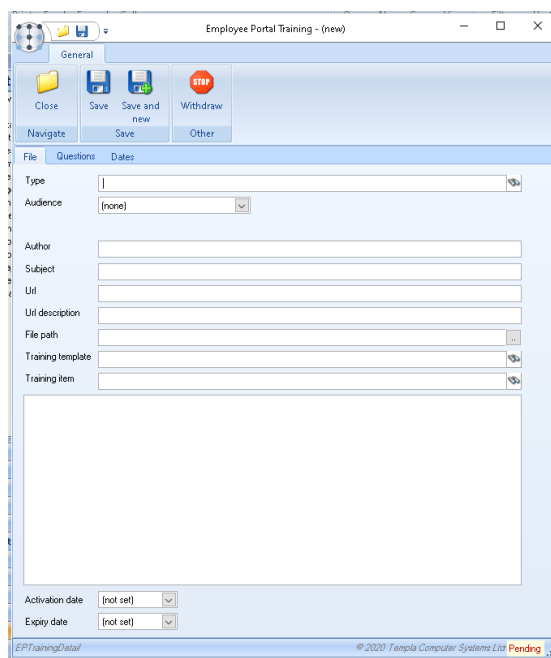
The screenshot shows the 'Employee Portal Training' form. The 'General' tab is active. The form contains the following fields and values:

- Type: Core Training
- Audience: Company wide
- Author: Test
- Subject: Training
- Uri: (empty)
- Uri description: (empty)
- File path: S:\PRODUCTS\TemplaCMS\Client_versions\PROJECTS\Projects_Demo_v6.1.0\Store\EmployeePortal\13221324954154200.docx
- Training template: Test
- Training item: Chemical Uses & DI
- Activation date: 20/12/2019
- Expiry date: [not set]

To add New, select the New button or Copy an existing Training item or double click on an existing Training item to amend/Withdraw.

When working on an existing Training item all the fields are greyed out except for the Expiry date. Changing this will define when the Training item is to expire. This can then be saved. Alternatively, you can Withdraw the Training Item which will remove this immediately from the relevant Employees Portal.

When adding a new or copying an existing Document all fields can be edited.



The screenshot shows the 'Employee Portal Training - (new)' form. The 'General' tab is active. The form contains the following fields and values:

- Type: (empty)
- Audience: (none)
- Author: (empty)
- Subject: (empty)
- Uri: (empty)
- Uri description: (empty)
- File path: (empty)
- Training template: (empty)
- Training item: (empty)
- Activation date: [not set]
- Expiry date: [not set]

File:

Type: Defines the Training type

Audience: The defines who will receive the Training. Options are:

(none): this is the default. Until an Audience has been selected the Training will remain at status “not assigned”

Client: The Training will go to Employees who work at the site(s) for that specific Client. When selecting this option, a further cell will appear to select the Client.

Company-wide: The Training will go to all Employees, where the database is flagged to be enabled on employee

Employee: The Training will go a specific Employee. When selecting this option, a further cell will appear to select the Employee.

Payroll: The Training will go a specific Employee. When selecting this option, a further cell will appear to select the payroll data source.

Site: The Training will go to Employees who work for that specific Site. When selecting this option, a further cell will appear to select the Site.

Author: Free text to define whom the Training originates from i.e. Templa Support Team

Subject: Free text to define the subject of the Training

URL: This allows you to add in a link to an external website, such as youtube etc for video streaming options

URL Description: This allows you to rename the link to 'Slips and Trips Video' instead of having the URL.

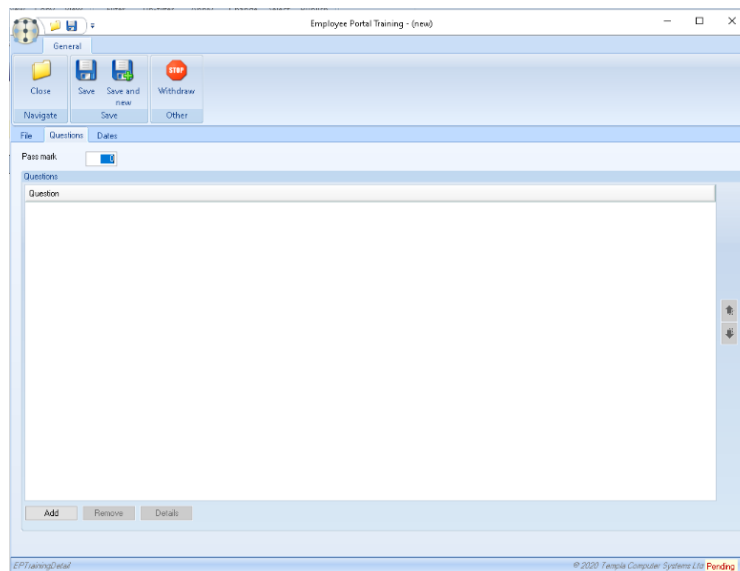
File Path: click on the far-right to open the file explorer to open to allow you to select the file to attach.

Training Template: this allows the definition on which Training Template the user will complete

Training Item: this will allow the define which Training item it is associated too.

TemplaCMS - EmployeePortal is not designed to broadcast videos therefore if videos are required then please use video sharing platforms such as; YouTube, Daily Motion etc. Templa is unable to recommend which sharing platform should be used.

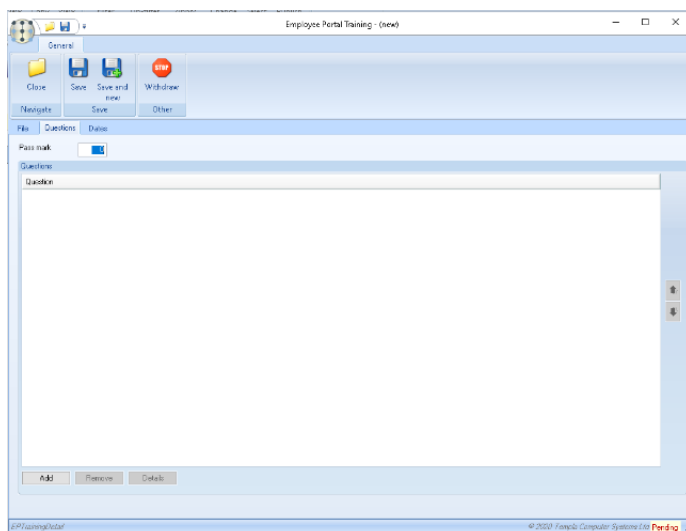
Notice Detail: Main area to display the Training detail



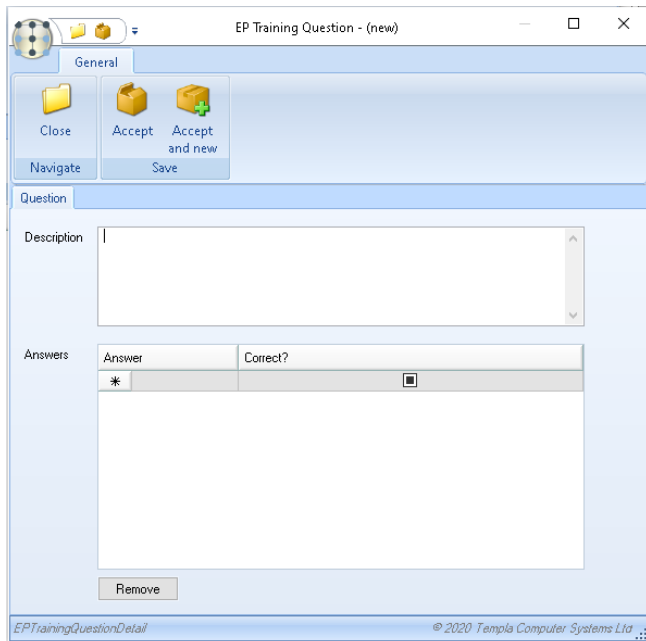
Question:

Pass Mark: where you set how many correct answered need to be supplied by the employee to pass the training

Questions: To add a new question, use the 'Add' button



When the questions option is open, then you can define the question and the answers possible to the employee and which one is the correct answer.

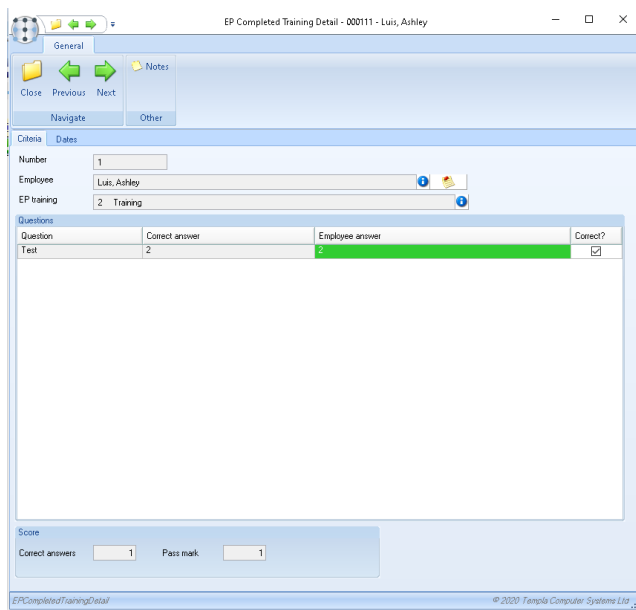


Please note **only** one answer can be flagged as correct

EP Completed Trainings

This option will list the of the Training that has been completed by Employees on the Portal. Within this option, you will be able to view the answer the employee has done for the

To access the Change, double click on this Change




EMPLOYEE PORTAL

The employee is 'customisable' to include companies' logo on the Homepage and the Navigator.

Logging in

To log in the employee will need to enter their Employee Code and their password.



Log In

Employee code

Password


Log In

Forgotten password

First time user

Forgotten Password:

If the employee has forgotten their password, they can use the 'Forgotten Password' option they will need to enter their Employee Code, NI number and their Date of Birth.



Log In

Employee code

NI number


Date of birth

Log In

Cancel

First Time User:

If an employee has not yet set up their password, there is an option for 'First time user', they will need to enter their Employee Code, NI number and their Date of Birth.



Log In

Employee code

NI number

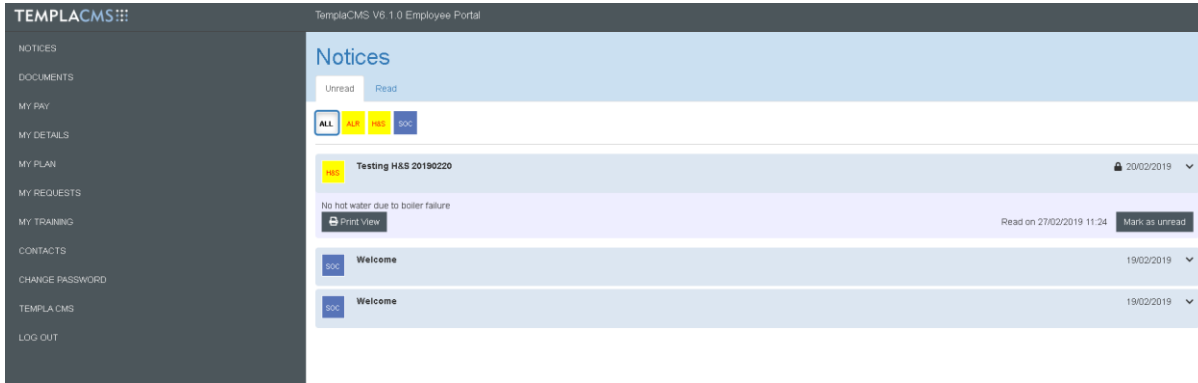
Date of birth

Log In

Cancel

Notices

When the employee logs in the notices screen will appear as default:

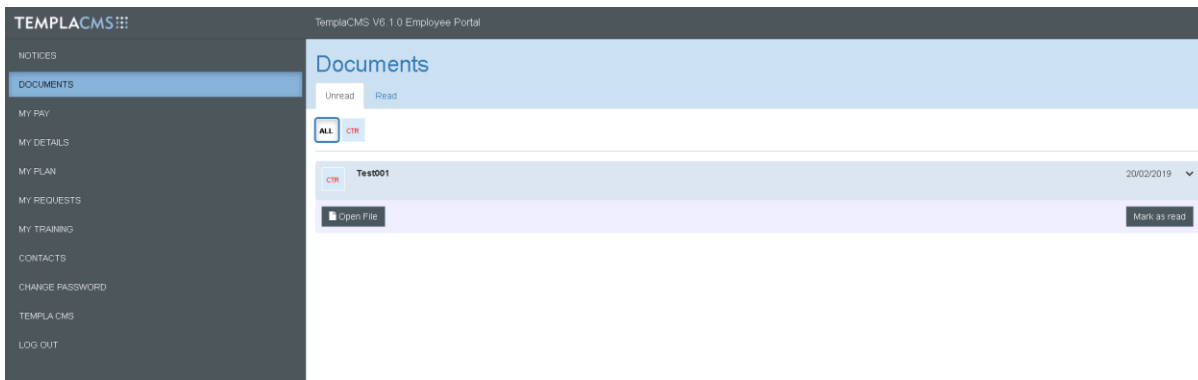


This where the employee sees and notices that have been sent to them. They can then mark them as 'Read' if they wish to. It is possible to see the 'Read' items by changing 'unread' to 'read'

Documents

When the employee selects the document option in the navigator:

The employee will then be able to see any documents that have been uploaded of them, i.e. their contract, Handbook etc. The employee will need to use the 'Open file' option to view any documents. They can then mark them as 'Read' if they wish to.

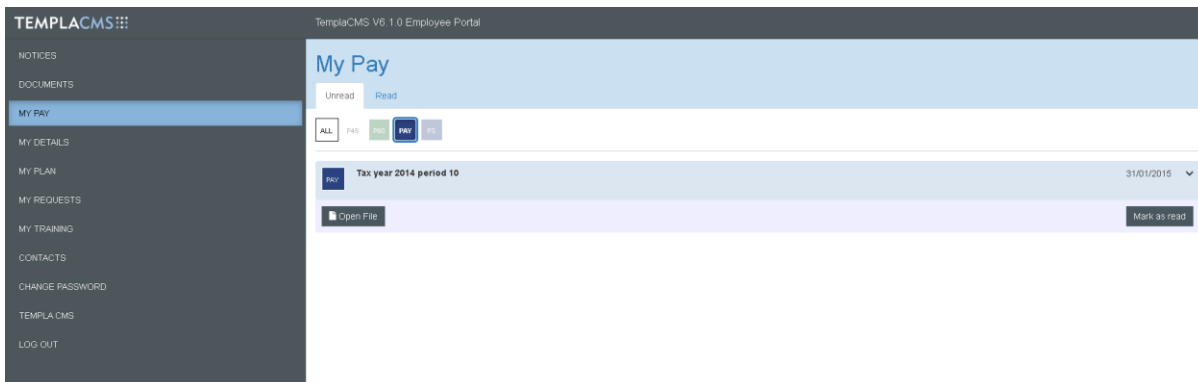


It is possible to see the 'Read' items by changing 'unread' to 'read'

My Pay

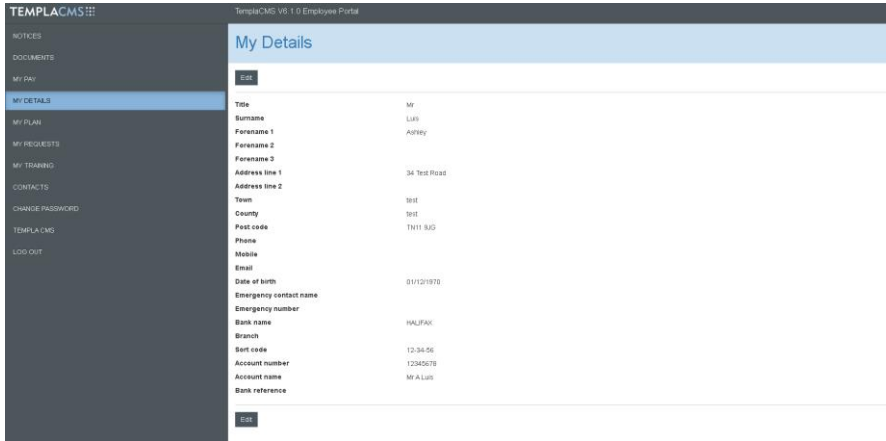
This is where pay-related documents will be stored on the employee portal, the employee will be able to download payslips at any point without contacting Payroll teams.

The employee will need to use the 'Open file' option to view any documents. They can then mark them as 'Read' if they wish to. It is possible to see the 'Read' items by changing 'unread' to 'read'



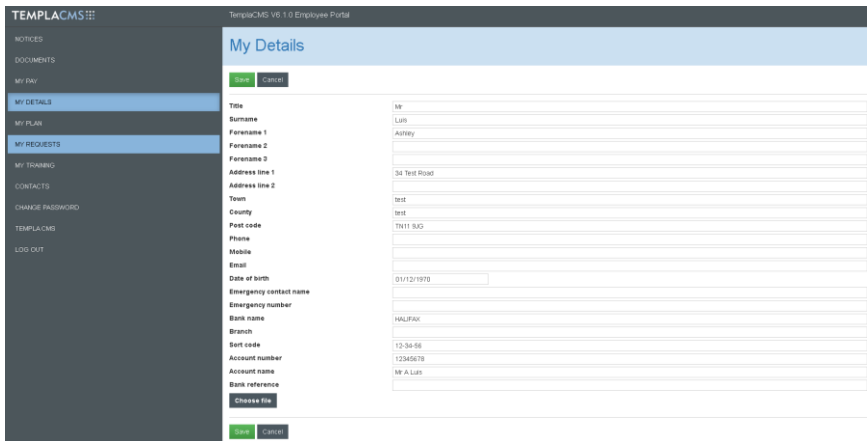
My Details

My details section the employee will be able to see and update their details.



To update the details the employee just needs to use the 'Edit' option this will then allow the employee to update the details required. If Proof of change is required, then the employee will need to use the option of 'Choose File' this will then allow the employee to access the files on their device.

Once the details are updated the employee can then click 'Save'

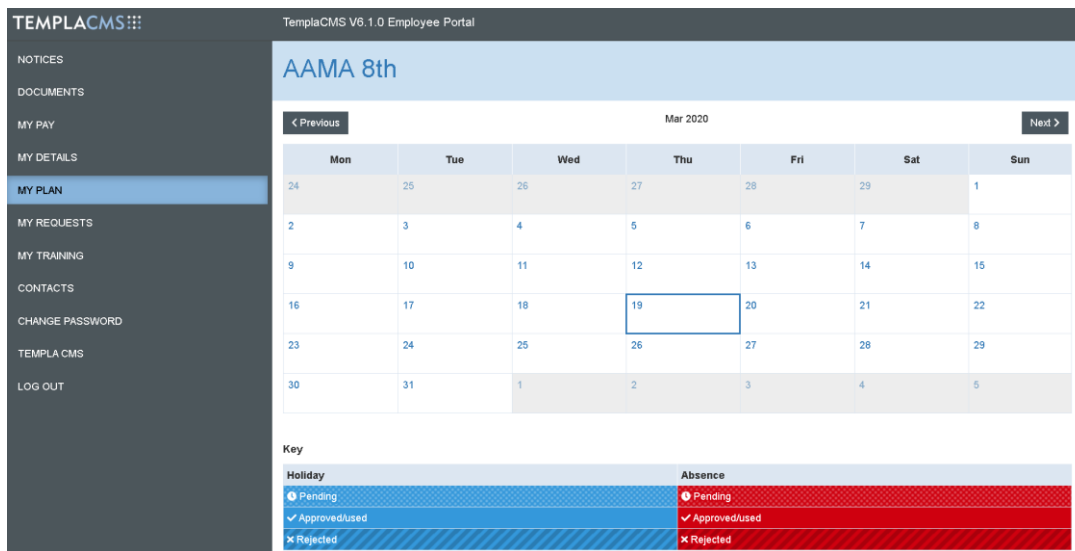


My Plan

The 'My Plan' section the employee will be able to see their holiday entitlement, holidays pending approved and those that are approved of each of the sites the employee may work on:

Site	Entitlement	Used	Approved	Pending
AAWS 2ND 2019	28.00	0.00	0.00	0.00
AMPI 1ST 2019	28.00	0.00	0.00	0.00
BAFH FITZWILLIAM 02 2019	28.00	0.00	0.00	0.00
BBNH 69 2019	28.00	0.00	0.00	0.00

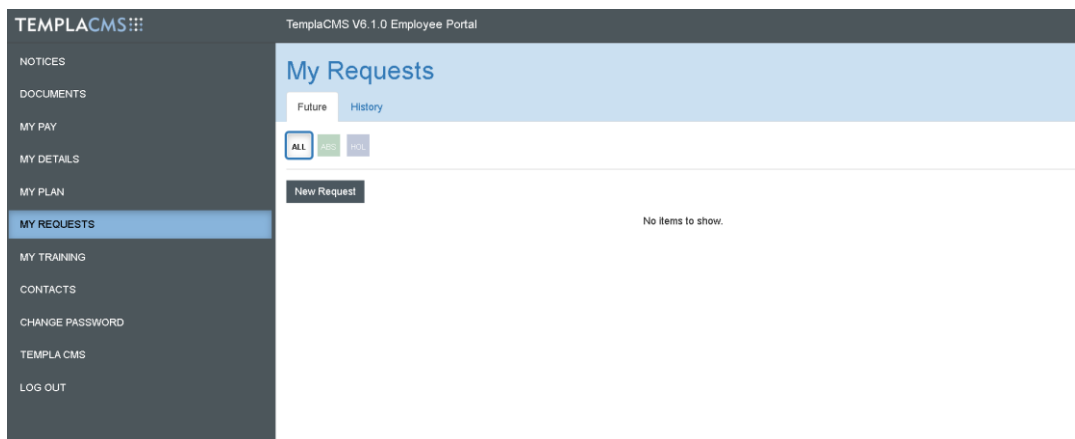
The employee can click onto each site and look at a monthly calendar to see their requests at this level.



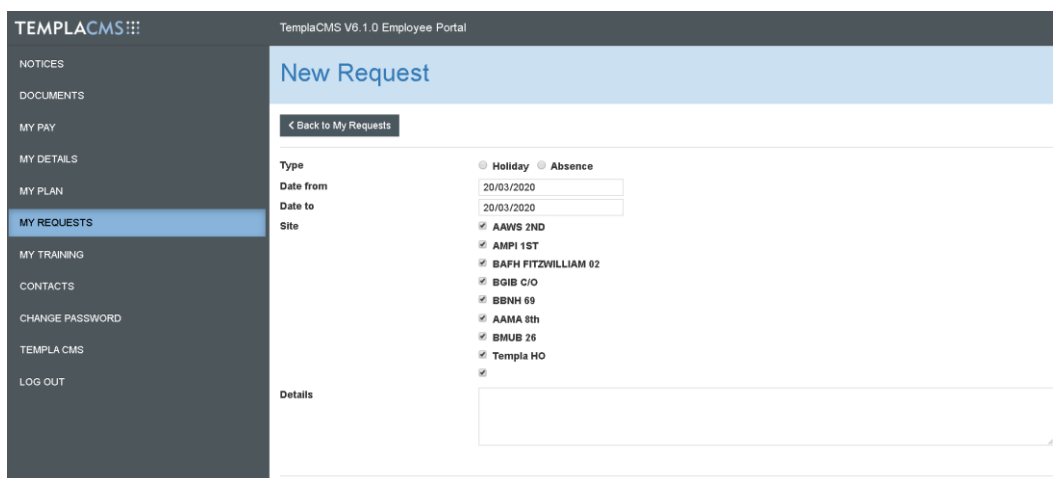
Employees can make requests for holiday/absence by double-clicking or using the 'My Requests' option detailed below.

My Requests

The 'My Request' option will allow the employee to book in any holidays/absences that may be required, using the 'New Request' option. The employee can see history request by



When the new request option is selected the user can then set which type of request, holiday or Absence:



Holiday:

If the holiday is selected then the employee will just need to enter the dates from and to and the selected sites (if not all).

The employee may wish to enter additional details within the 'Details' box.

Once the employee has entered the details, they can 'Check' their Holiday. This will ensure they have enough allowance and will check their pro-rate allowance (if selected). The employee can delete a requested day by using the 'Delete Request' option.

TEMLACMS V6.1.0 Employee Portal

Edit Request

[Back to My Requests](#)

Type: Holiday Absence

Date from: 20/03/2020

Date to: 20/03/2020

Site: AAWS 2ND AMPI 1ST BAFH FITZWILLIAM 02 BGIB C/O BBNH 06 AAMA 8th BMUB 26 Templa HO YVOY

Details

[Check](#) [Delete request](#)

Absence:

If an absence is selected then the employee will need to select an absence reason.

TEMLACMS V6.1.0 Employee Portal

New Request

[Back to My Requests](#)

Type: Holiday Absence

Reason:

Date from: 20/03/2020

Date to: 20/03/2020

Site: AAWS 2ND AMPI 1ST BAFH FITZWILLIAM 02 BGIB C/O BBNH 09 AAMA 8th BMUB 26 Templa HO

Details

[Save](#)

Once the user has entered the date range and the relevant sites (if applicable) then this will be sent through to TemplaCMS for Approval. To do this the employee will just need to select save.

My Training

The option of 'My training allows the employee to carry out the training. The 'Begin Training' allows the employee to answer the question related to the training

TEMLACMS V6.1.0 Employee Portal

My Training

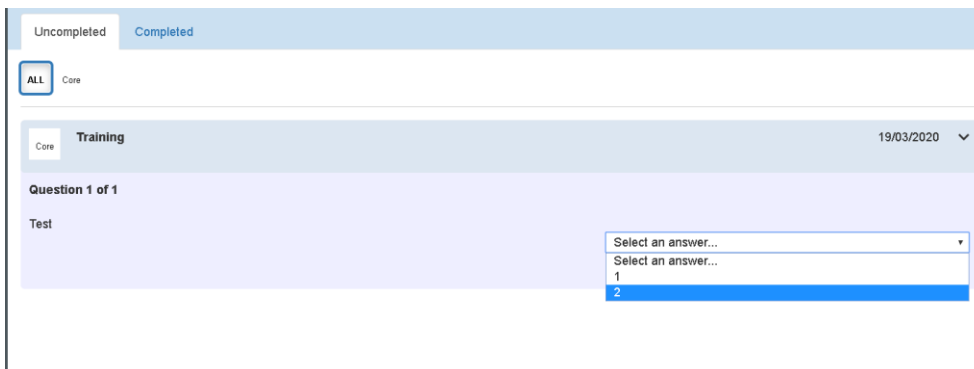
Uncompleted Completed

ALL Case

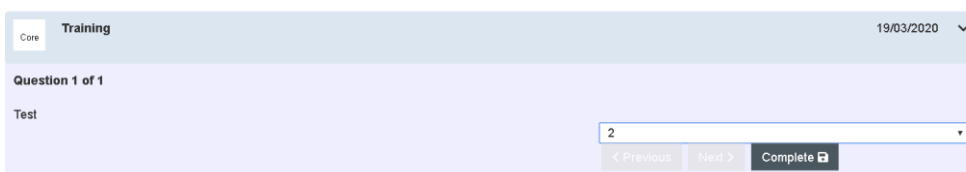
Case	Training	19/03/2020

[Slip, Trips and Falls](#) [Begin training](#)

When clicking the employee will not be able to return to obtain the video or document. The employee can select the answer to the question via the dropdown.



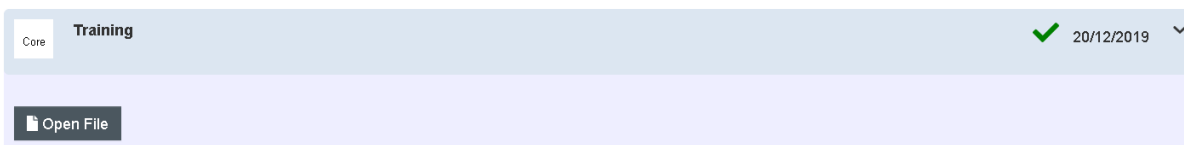
Once the employee has completed the training they will need to tick the 'Complete' option.



If the employee has failed then a 'Red Cross' will be shown in the top right corner:



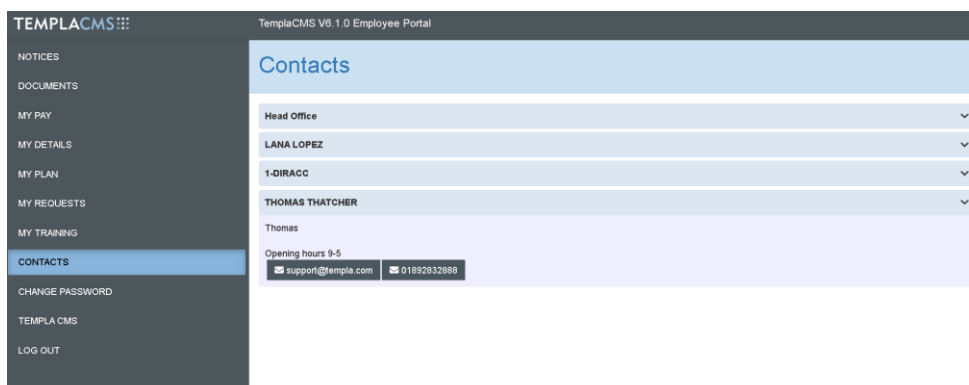
If the employee has passed then a 'Green Tick' will be shown in the top right corner:



The employee can see completed training using the 'Completed' tab.

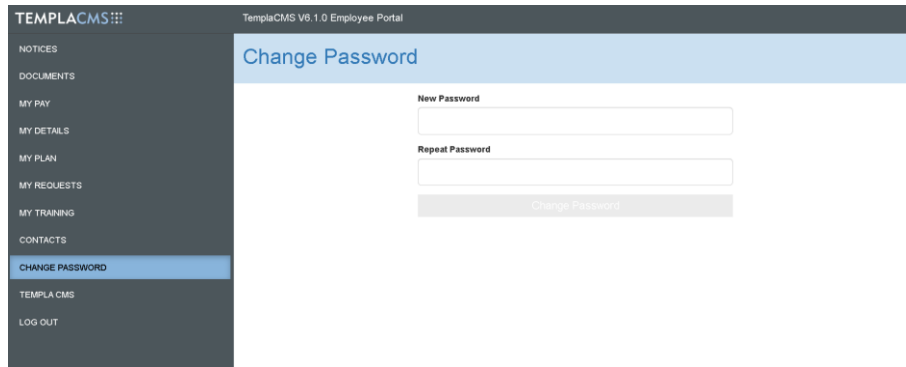
Contacts

If the details have been entered for contacts (system or business analysis): the details will be shown below:



Change Password

This will allow the employee to change their password whilst they are logged into the TemplaCMS Employee Portal:



The screenshot shows the 'Change Password' page in the TemplaCMS Employee Portal. The page has a dark grey sidebar on the left with a menu containing: NOTICES, DOCUMENTS, MY PAY, MY DETAILS, MY PLAN, MY REQUESTS, MY TRAINING, CONTACTS, CHANGE PASSWORD (highlighted in blue), TEMPLA CMS, and LOG OUT. The main content area has a light blue header with the title 'Change Password'. Below the header, there are two input fields: 'New Password' and 'Repeat Password'. A grey button labeled 'Change Password' is positioned below the second input field.

User-Defined Links

If 'links' have been set up in System Control (detailed above) then the user can click this button to move to an external website. I.e. company website.

Log out

This just allows the employee to log out of the Portal.



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.