TEAM Software
by WORKWAVE

Manager Portal Set Up/Configuration

TEMPLACMS

Version: 2 (CMS 6.1.0, 2021.07a)

COMMERCIAL STATEMENT

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

CONTENTS

INTRODUCTION

The TemplaCMS Manager Portal system is a two-part application consisting of both client (TemplaUI) and server (WebAPI) applications. These will 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 however it is Internet Explorer is not used for this.
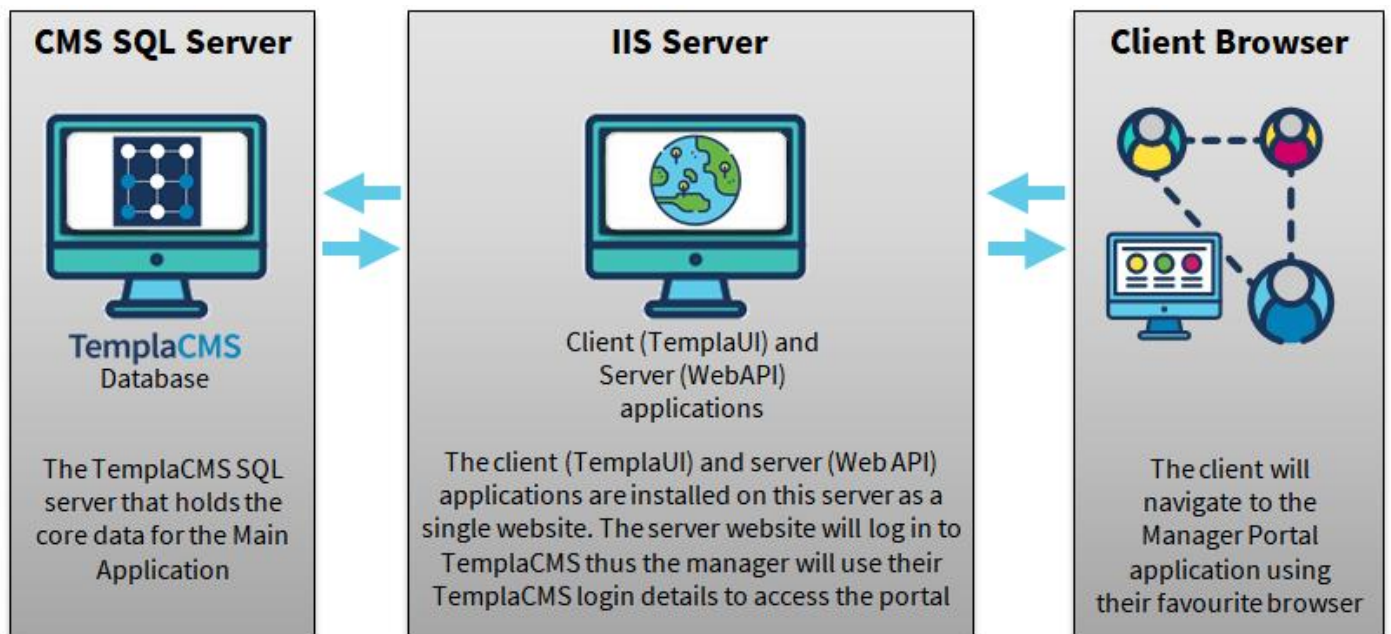
The server application communicates between the frontend client application and the TemplaCMS database.

The setting up of a secure connection via HTTPS as such Templa recommend that an SSL certification is used and applied, also port forwarding is 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 Manager Portal application to be accessible from outside your network; this will also be the responsibility of the client's IT department

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 Manager Portal application. If a connection is detected without a valid authentication ticket the connection is severed.

SCHEMATIC

CMS SQL Server

TemplaCMS Database

The TemplaCMS SQL server that holds the core data for the Main Application

IIS Server

Client (TemplaUI) and Server (WebAPI) applications

The client (TemplaUI) and server (Web API) applications are installed on this server as a single website. The server website will log in to TemplaCMS thus the manager will use their TemplaCMS login details to access the portal

Client Browser

The client will navigate to the Manager Portal application using their favourite browser

TECHNICAL REQUIREMENTS

Server

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

- Microsoft IIS (preferably above version 7)
- 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, we recommend IIS version 7, however version 6 is acceptable.

Client

TemplaCMS Manager Portal has been designed to be available across all major browsers; although still accessible, however, Internet Explorer is not a browser that is supported and as such we do not recommend the use of it. Additionally, although use on a mobile phone and other small handle devices is possible it is suggested to use a laptop/desktop PC or a larger size mobile device.

TEMPLACMS CONFIGURATION

TemplaCMS Manager Portal (**MP**) is configured to allow all users access by default.

System Control

The Manager Portal options are available under **System Control > Service Point modules**:
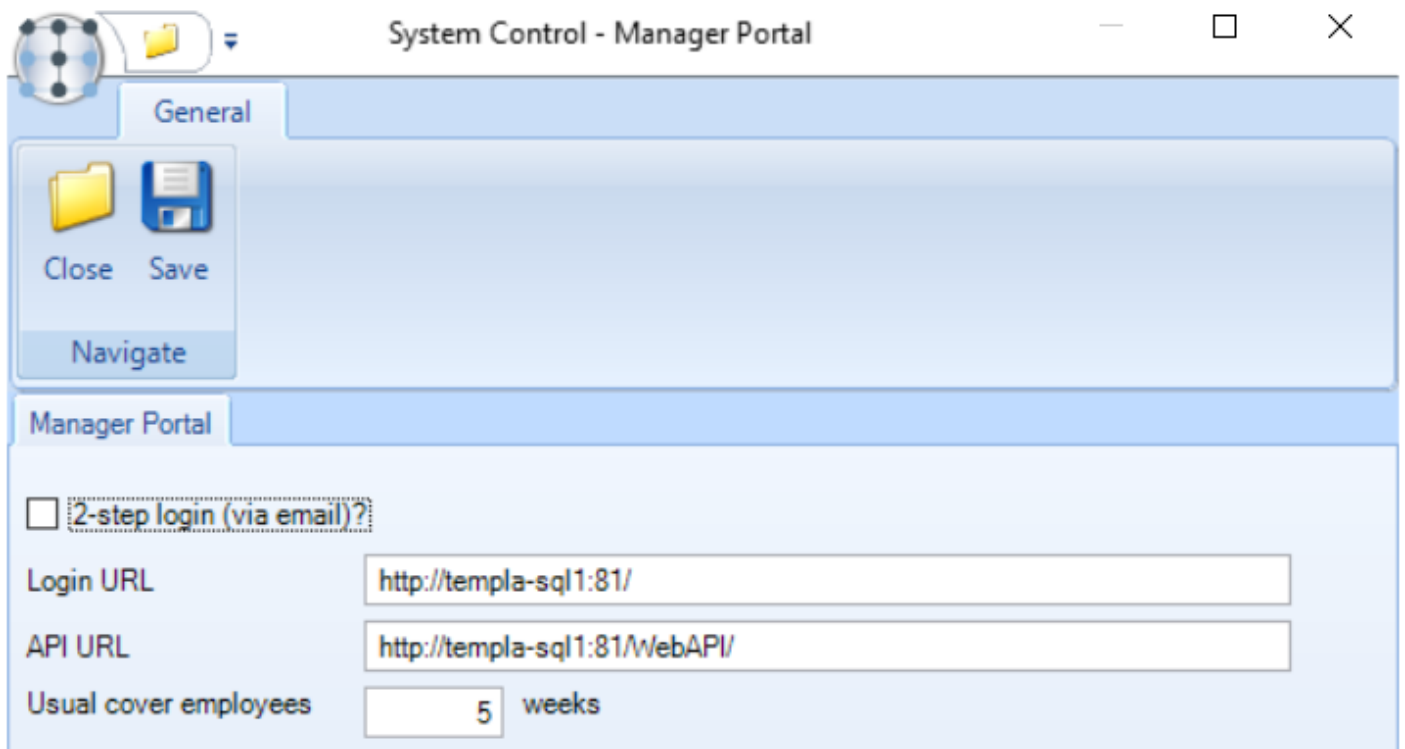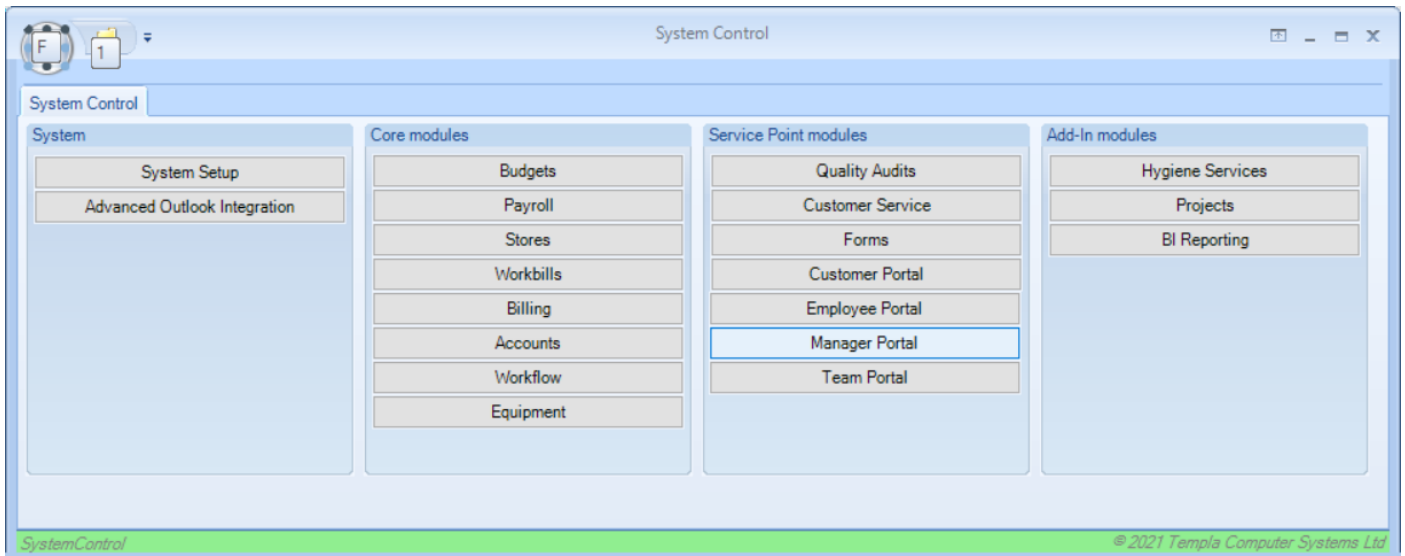

2-Step Login (Via Email): this is a type of 2-step authentication for the user (i.e. manager) and where an E-mail is defined it will email a code to the user to authorise their entry; this code is valid for 10 minutes, plus the user must have an email address defined on their user.

Login URL & API URL: the login URL defines the address for MP but will be passed to Employee Portal (**EP**) System Control to allow EP to render a link between the portals, with the API URL defining where the webservies has been installed – please do not change these details.

Usual Cover Employees: the number of weeks the system will check to see if an employee has worked on the site previously; these employee(s) will then show in the green when the list of employees is loaded within the 'add employee' option.

User Maintenance
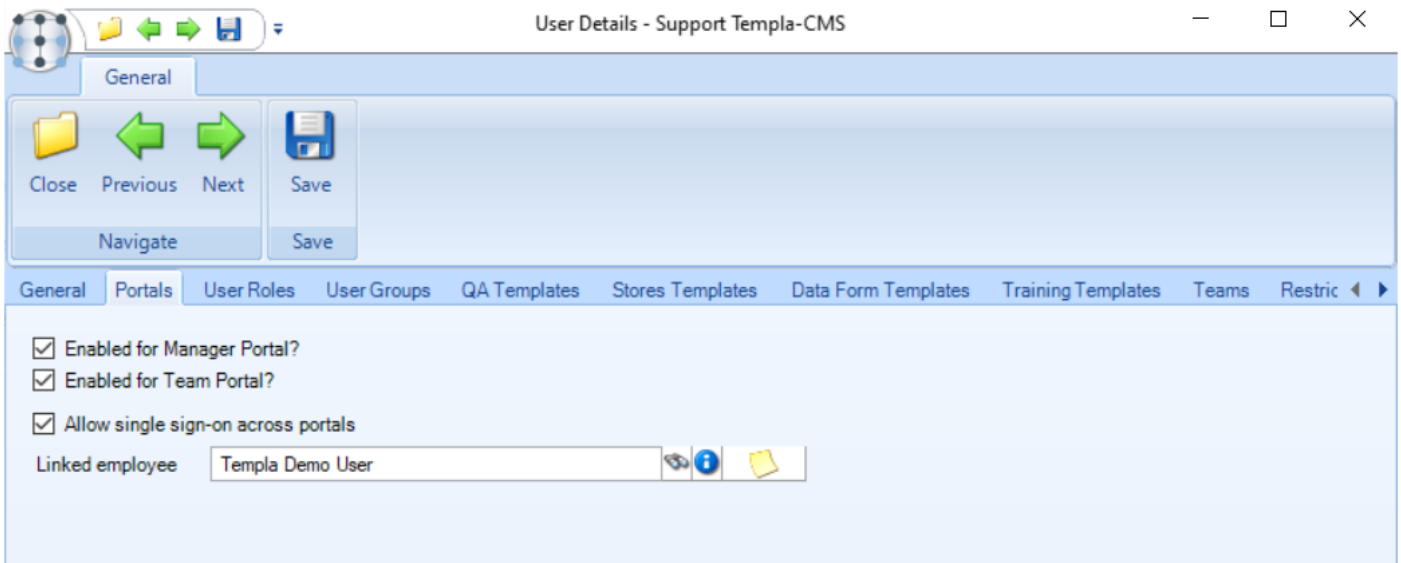
Within the User Maintenance screen, there is a tab called 'Portals' which controls the options for:

- **_Enabled for Manager Portal:_** if selected the user (i.e. manager) will be able to log in and use the Manager Portal
- **_Allow single sign-on across portal:_** this setting controls if the user can log into the Employee Portal and the Manager Portal at the same time; if ticked then you will need to select a Linked Employee
- **_Linked employee:_** this option is to link the user and the employee records together

Function Control
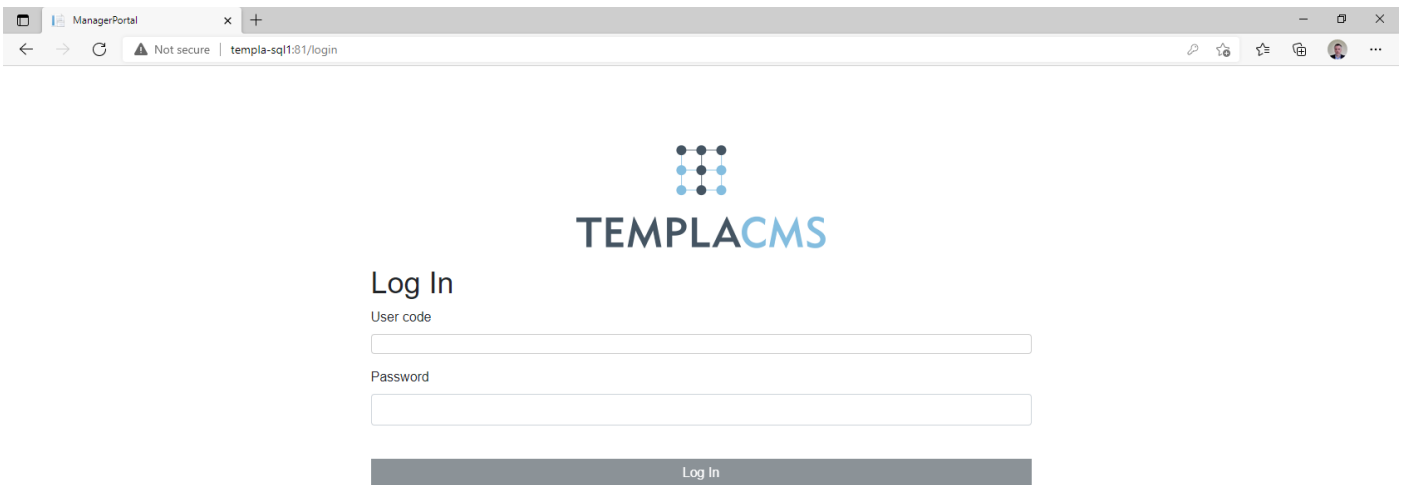
The Manager Portal utilises:

- The Roster Manager functions for the user to be able to use the portal
- The Staff Plan functions for the user to be able to amend details on the portal.

MANAGER PORTAL WEBSITE

Log In

This just allows the user to log into the Manager Portal, prompting the user as follows:
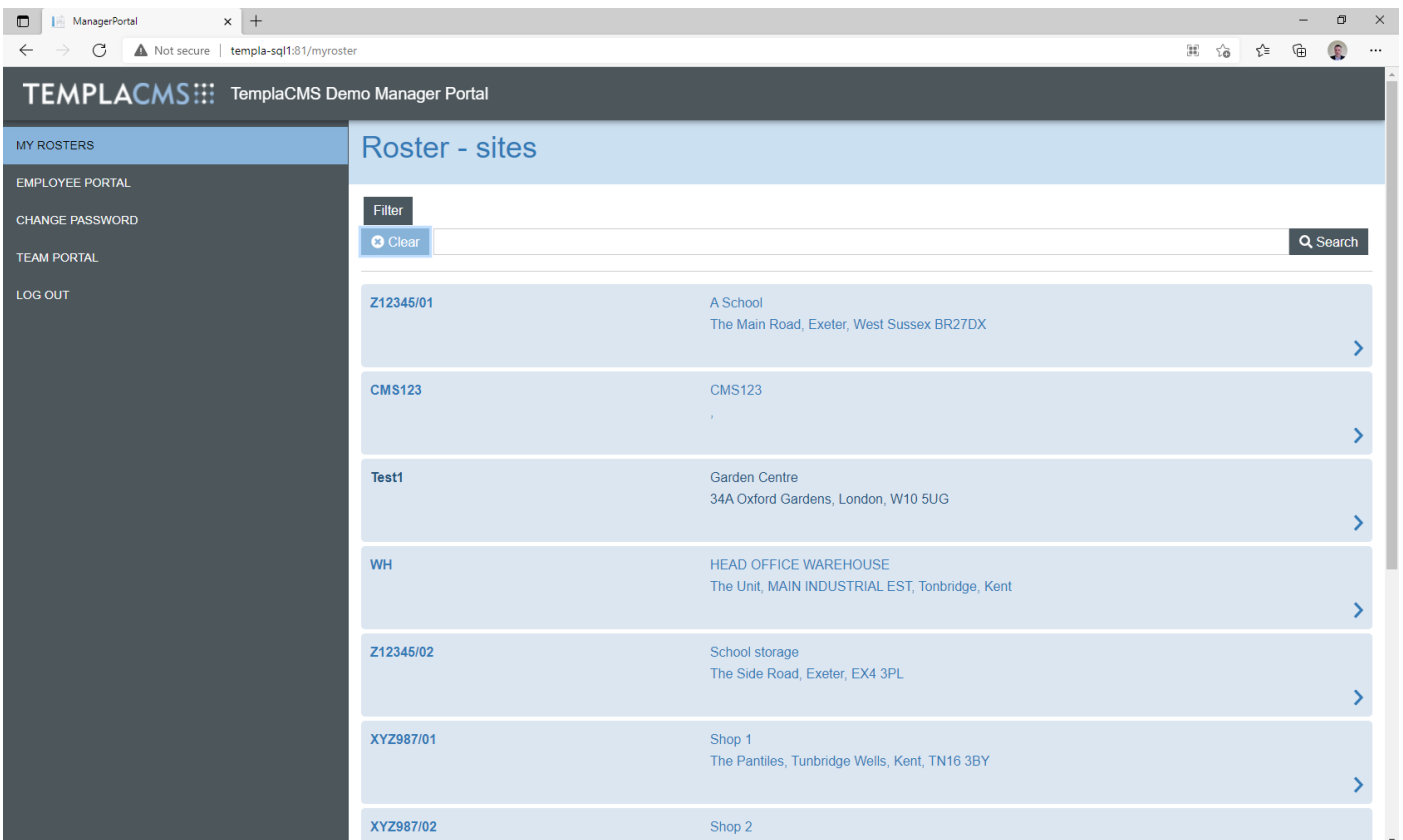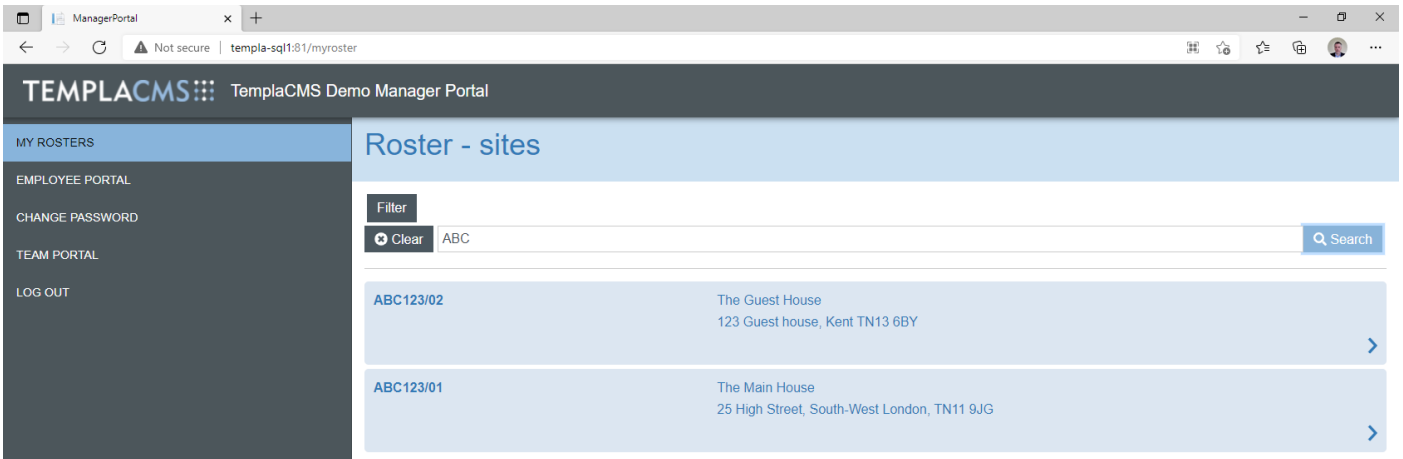

My Roster

SITE LIST

When a user logs into the Manager Portal, the default page is the '**Roster - Sites**' which will list all the live sites that the user is authorised to view (i.e. as defined on TemplaCMS via the user's restricted analysis) and will show basic details such as the site address and name:

Filter: this can be used to filter the sites on either the site code (e.g. below entering 'ABC' then pressing '**Search**'), site name or site address:

Clear: this will remove the filter and re-display the full sites of sites that the user is authorised to.

SITE ROSTER

To enter any site to view the roster, the user can click on the site; this will then automatically set the date to the current date and then show the employees that are contracted to the site:
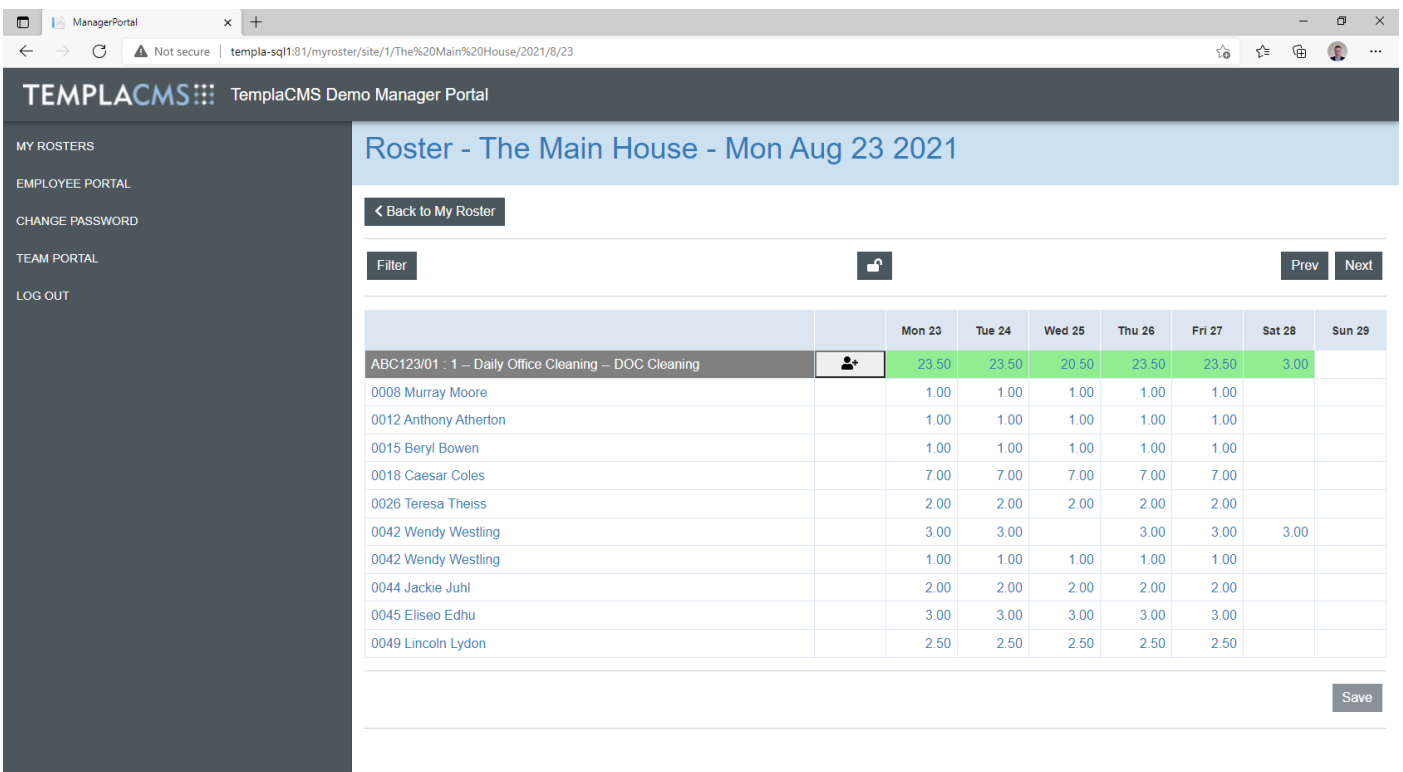
Once the user has gone into a site, they have additional options which are:

- **Back to Roster:** this will take the user back to the list of sites that they have access too
- **Filter:** this allows the user to filter to a specific employee
- **Prev:** this allows the user to look at the previous week's schedule (based on the current date); if changes have been made, a warning will be given to prompt the user to save
- **Next:** this allows the user to look at the next week's schedule (based on the current date); if changes have been made, a warning will be given to prompt the user to save
- **Padlock**: this control is a mechanism to identify that they have completed work on a particular roster/week but this is not linked to the timesheet 'Week completion' flag as one roster week could include employees from multiple payrolls. **Please note:** where an entire roster/week falls before the last posted date for the payroll, the padlock will

be automatically applied which will put the data into a 'Read-Only' form, thus if any further changes are required the user will need to 'unlock' the roster/week

- **_Save:_** this will become available if changes have been made and will send any amendments back to TemplaCMS to update the staff plan and/or timesheets; changes are only made at this point so any accepted amendments are not saved until this point

SITE ROSTER AMENDMENTS

To update a Roster the user needs to click on a site, at this point you can see the hours the employee(s) are set to work throughout the week plus any variances:

Any variances to contracted (not budget) hours will turn the 'green' to red with an up and down arrow to indicate if it is above or below the contracted hours; this may vary to the budgeted hours, i.e. if there is a vacancy within the contracted hours. If any absence, cover or holiday exists, this is shown using coloured pins (as per **Roster Manager**) as follows:

- Red pin = Absence
- Blue pin = Holiday
- Green pin = Cover
- Yellow pin = more than one adjustment on the day

Clicking on a specific cell (i.e. for the relevant task/employee/day) will access the **Roster Day** screen – see below

ROSTER SITE/TASK/EMPLOYEE/DAY SCREEN

This screen shows the details for the selected Site/Task/Employee/Day:

Employee - the employee payroll code and full name are displayed at the top of the screen, along with their 'work type' (e.g. cleaner, supervisor, etc) plus the date being reviewing (e.g. Tue Apr 14 2020)

Next/Prev - these go to the next or previous day for this site/task/employee; on reaching Monday or Sunday it is not possible to back or forward any further, as each roster week is treated in isolation so any changes need to occur for the week

Planned - this is the planned shift time(s), if defined

Actual - this is the actual shift time(s) which will only be populated if T&A is being run for this site so if it is not **OR** if no T&A details exist yet then a "?" will be shown, whereas if the employee has logged in but not yet logged out, this will appear as follows, e.g. 05:58-00:00

Contracted - this is the contracted hours (or temporary contracted hours if temporary joiner)

Net - this is the contracted hours less/plus any timesheet adjustments so this is the hours to be paid

Holiday/Absence/Cover - please see "**Adding a Holiday**" , "**Adding an Absence**" or "**Adding Cover**" below

Notes - any notes added will be shown within the staff planner and within the internal text within the timesheet audit against the day.

Adding Holiday

If the user wishes to make a change by adding in holiday, they can click on the relevant day for the employee on the **Site Roster** screen (above); it will then take them to a more detailed screen similar to the below:

By clicking the 'Holiday' button this will default in the contract hours for the employee. It is possible for the user to enter the number of hours, i.e. if a half-day has been taken.

Once accepted a blue pin will be shown on the **Site Roster** screen; if half a shift was taken as holiday and half as absence, then once accepted a yellow pin will be shown on the **Site Roster** screen.

Adding Absence

If the user wishes to make a change by marking an employee as absent, they can click on the relevant day for the employee on the **Site Roster** screen (above); it will then take them to a more detailed screen similar to the below:

By clicking the '**Absent**' button this will default in the contract hours for the employee. It is possible for the user to enter the number of hours, i.e. if an employee left 15 minutes early. If the user has used the absent option, they will need to select a reason for the absence. This will pick up the default absence reason on **System Control** if it has been defined.

Once accepted a red pin will be shown on the **Site Roster** screen; if half a shift was taken as holiday and a half as absence, then once accepted a yellow pin will be shown on the **Site Roster** screen.

Adding Cover

If the user wishes to make a change by adding in cover, they can click on a relevant day for the employee on the **Site Roster** screen (above); it will then take them to a more detailed screen similar to the below:


If the 'Cover' option at this stage is pressed it will populate the covers hours to match those that are not being worked (i.e. due to absence or holiday) for that site/task/day, although this can be amended.

At this stage the user can enter the rate of pay that is being paid to the employee, even if 'Override Rate override?' is not checked for the cover timesheet adjustment; if no cover rate is entered, then a 'cover rate' will be defaulted (either from the employee if they are already on the site **OR** from the contract if a default cover rates or pay scales exist **OR** will be left blank if a default rate cannot be determined) within TemplaCMS on saving this change back; this defaulted cover rate will then be displayed when this site/task/employee/day is next viewed.

Once accepted a green pin will be shown on the **Site Roster** screen; if holiday ad/or absence where taken but then cover also added, then once accepted a yellow pin will be shown on the **Site Roster** screen.

ADDING A TEMPORARY EMPLOYEE

There may be a need for the user to add in a temporary joiner to a sites roster, i.e. they are planned to cover an employee's holiday or absence. This can be done by clicking the 'New employee' option (shown below):
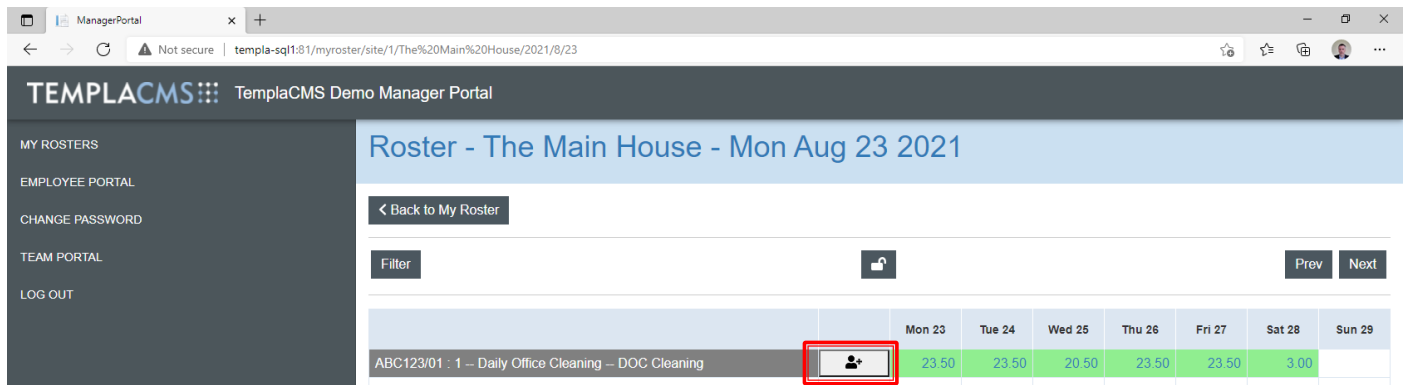
This will display the following screen where:

- '**Sort By Description**' can be toggled to '**Sort by Code**' or '**Sort by Postcode**'
- **Filter** can be used to filter the sites on either the employee code (e.g. below entering 'ABC' then pressing '**Search**' or '**Enter**'), employee name or employee postcode:
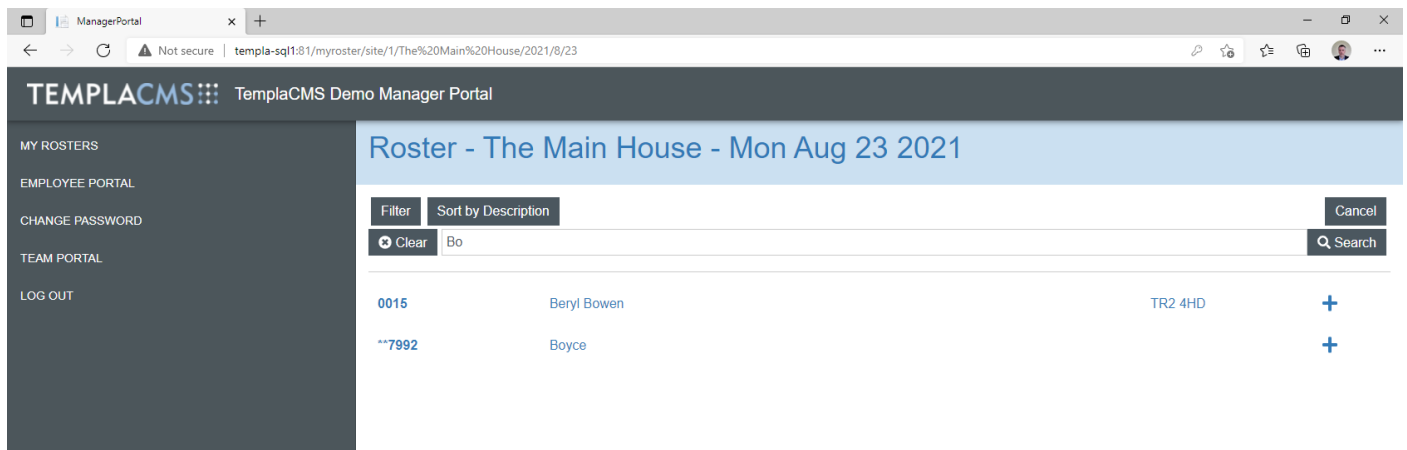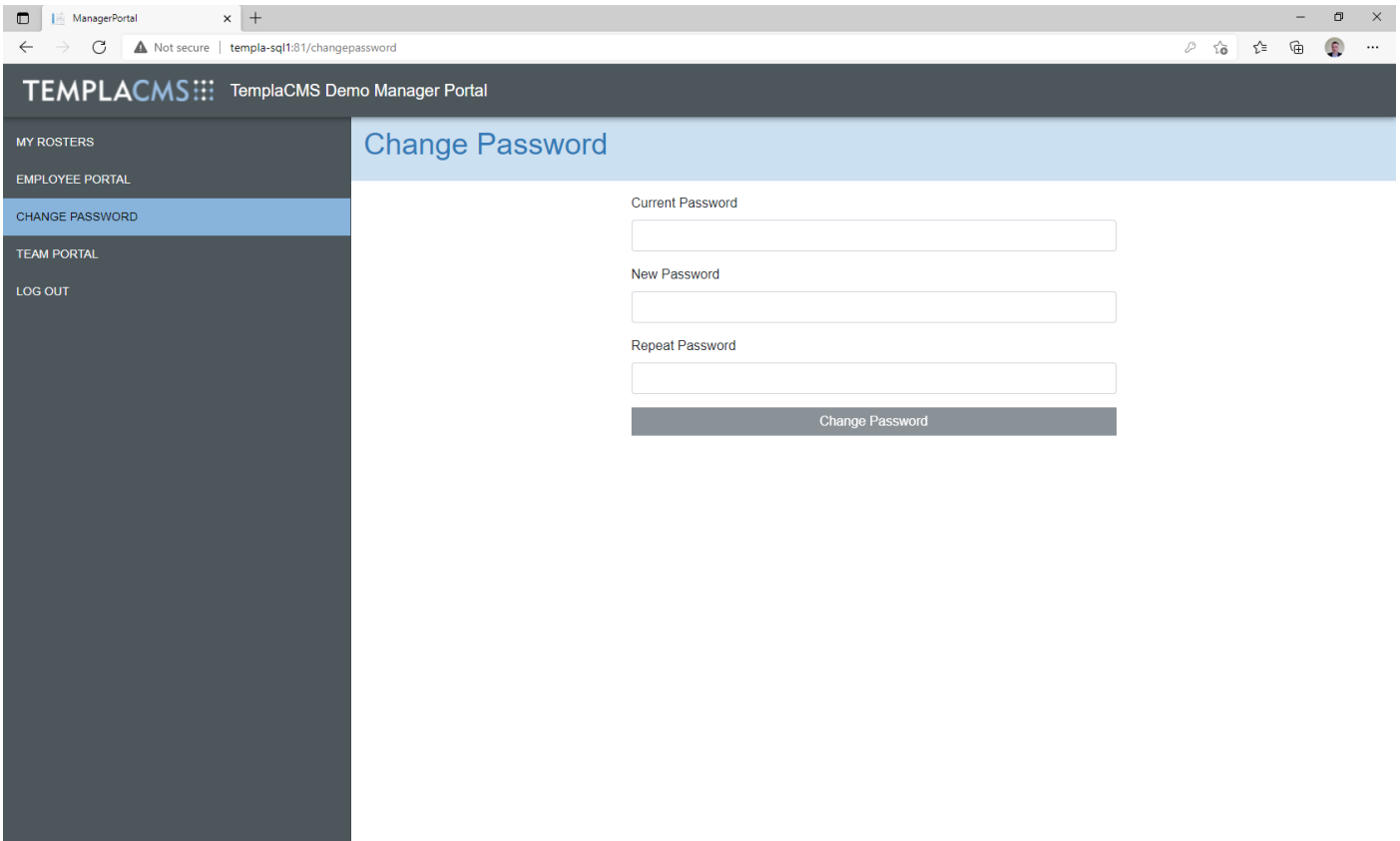

The employees shown are those contracted to work on sites to which the user is authorised and not all employees within the payroll data sources to which the user is authorised to.

Any employees displayed in green are those that have worked on this site within the last X weeks, as defined on **System Control**.

- Pressing the '**+**' button will select the employee and add them to the 'Site Roster' screen, pre-selecting the **default** 'employee work type' as defined on the 'Employee Work Type' list within TemplaCMS
- Pressing '**Cance**l' will return the user to the 'Site Roster' screen without selecting an employee
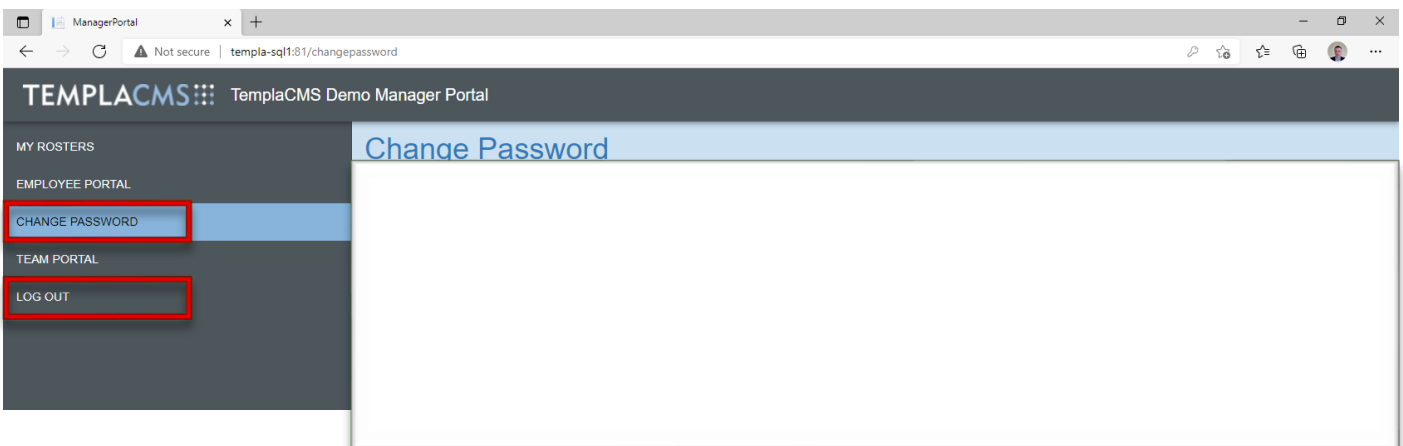
Change Password

This allows the users to change their password where the new password must adhere to the rules defined on **System Control**:

Other Portals

If the company is also licensed for TEAM PORTAL or EMPLOYEE PORTAL, and the user has been setup to allow single logon (via User Maintenance – see above) then options to access these other portals will be available from the main menu:

Log out

This just allows the user to log out of the Manager Portal, prompting the user as follows:

Log Out

Do you really want to log out?

Log Out

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.