

Mobile Overview v2 TEMPLACMS

Version: v.2.0.0 (October 2018)



COMMERCIAL STATEMENT

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INTRODUCTION

These training sessions notes & are designed with the intention of providing background information and useful hands on experience of using general CMS functions and the CMS payroll module.

These notes are designed to complement the training and assist you at a later stage when away from the training environment.

TEMPLA-CMS SIGNON

Initial Menu

On launching the Templa Mobile application the user is presented *Home* screen allowing access to the *Site Manager* and *Employee Manager*:



The initial screen will advise the user if there is any data to sync. If there are any items to sync a message will be displayed bringing this to the attention of the device user.

iPad 🗢	15:55	48% 🔳 🔿
\equiv	Welcome to Templa Mobile	
	1 item(s) waiting to be synced	
	Site manager	
	Employee manager	
	HS deliveries	

Synchronisation

On clicking the synchronize option the user will get the option to do a *Full* or *Partial* sync:

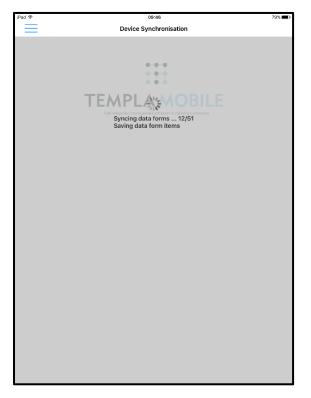


- A *Partial sync* will only send items from the *device* back to the *main server*
- A *Full sync* will full will download items from the main server and send items from device back to the server.

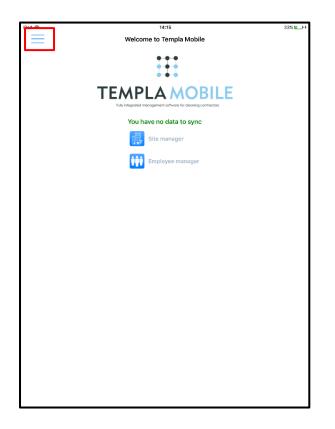
On selecting the relevant sync option, the user will be presented with the following screen:

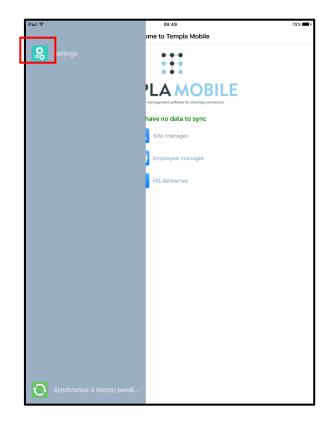
iPad 🗢	09:29	79%
\equiv	Device Synchronisation	
TE		
	Are you sure? Are you sure you wish to sync this device?	
	No Yes	

Click on Yes to continue:



Sync options can also be accessed via clicking on the main menu icon:





Configuration Screen

Clicking the menu icon on the top-left of the initial menu screen:

iPad 😤	14:15	33% 💶 + +
\equiv	Welcome to Templa Mobile	
	TEMPLA MOBILE	
	Fully integrated management software for cleaning contractors	
	You have no data to sync	
	Site manager	
	Employee manager	

Will present the below screen from where the user can select the 'Settings' option.

The correct GUIDs and URL details need to be entered here to enable the TemplaCMS app to communicate with the main TemplaCMS system correctly – GUID's and URL details should be provided by your IT department or co-ordinator. For further details please see the TemplaCMS Mobile Gateway.doc

iPad 李	09:49	79% 🔳 🕨
	ome to Templa Mobile	
8 Settings		
	have no data to sync	
	Site manager	
	Employee manager	
	HS deliveries	
Synchronise 0 item(s) pendi		

	16:51		56%
=	Settings		く 6
Server GUID			
9692a40d-88c0-46b3-a3	38-0b1c1ee37537		
Device GUID			
93038fb8-bcd4-41ab-ab2	25-ee67ef67abb6		
Server URL			
https://dev.templa.com:101	101/Service/Receive.asmx/ReceiveMes	sageFromMobile	
Detached from server?			
Version 2.00.12			

Alternatively, enabling **Detached from TemplaCMS** server will clear the existing data from the TemplaCMS app, leaving the mobile device user with the **demonstration** data.

SITE MANAGER

Sites

On selecting the Site Manager option from the home screen, the user will be presented with a list of sites that they have access to:

iPad 🗢	09:59		79% 💶)
—	Site Manager	1	
	Site Manager		
	Q search		
1			
152-154 High Street - Staines	ТW18 4АН		
В			
Blenheim Centre	TW3 1NL		
С			
Car park A & B - The Bentall	KT1 1TP		
Centre			
	01140 014		1
Centre Court Shopping Centre	SW19 8YA		В
Е			C E
			н
Elmsleigh Shopping Centre	TW18 4QB		к
н			P N
			R
Hersham Green Shopping Centre	KT12 4HL		S
Houndsditch - Cutlers Exchange	EC34 7811		т w
Houndstitten - Cutters Exchange	2038/700		
к			
	100 00 00		
Kings Mall Shopping Centre	W6 9HW		
м			
MP Real Estate W6 Car Park	W6 9HW		
D			
Р			
Palace Exchange Shopping Centre	EN2 6BP		

On selecting a *Site* the user will be presented with the main site information such as contract name, address, contact details, user defined properties, effective from and to dates, Site analysis details etc.:

No Service *	15:38	74% 💶 🗈
\equiv	Site info	く 🙆
TEST - TEST		
Contract		FRANK - Frank's Sites
Address		Test
Client		Test
Effective		01/12/2012 - Not set
Contract Review Date		
Main Contract Purchase Order No.		
Ad-hoc Goods and Service PO No.		
Contract Terms		
Contract Renewal Date		
Contract type		
New Contract Value		
Contract Review Date		
Common Parts Property ref		
Contact for booking Work		
Telephone No. for booking in work		
Email for booking in work		
Additional Email for booking in work		
Additional Email for booking in work		
Schedule of Works		
Permit to be Sent		
Access Time for Periodics		
Particular day for Periodics		
Access Time for Window Cleaning		
Particular day for Window Cleaning		
Access Details		

With the relevant site displayed the user can then click on the main menu icon (see above) which will give them access to additional site information such as *Tasks*, *Pay*, *Roster*, *Billing*, *Equipment* and *Contacts* depending on whether the user is allowed access to these areas or not.

In addition to the above, if allowed, the user will also have access to the transactions for the site such as **Quality audits**, **Stores order requests**, **Workbills**, **Service requests**, **Equipment audits**, **Staff training** forms and **Data forms**.

Please note: if no site is selected, then all transactions (i.e. *Quality audits*, *Stores order requests*, *Workbills*, *Service requests*, *Equipment audits*, *Staff training forms* and *Data forms*) for all authorised sites for that user will be displayed.

No Service	Ŷ	15:39		74%
		Site info	<	命
<				
î			FRANK - Fran	nk's Sites
				Test
í				
自			01/12/2012	Test
1			00/12[2012	- Hot aer
2				
A				
Transa				
*				
2				
₩				

Tasks

On selecting the *Tasks* option, each contract *Task* and Budgets related to the task is displayed for each site contract:

iPad Ҿ	10:41	79% 📼)
\equiv	Tasks	く 🟠
MUGG & BEAN		
1 - DAILY OFFICE CLEANING - DAILY O	FFICE CLEANING	
Starts		26/05/2015
Budget		Wages Budget for Timesheets
Effective		01/06/2017
Frequency		1 Weeks
Hours		444.00
Value		4015.20
Employees		12
Budget Effective		Materials 01/06/2017
Frequency		1 Weeks
Value		100.38
		100100
2 - RE-CHARGEABLE GOODS - RE-CH	ARGEABLE GOODS	
Starts		26/05/2015
3 - PEST CONTROL - PEST CONTROL		
Starts		26/05/2015
4 - WASTE - WASTE		
Starts		26/05/2015
5 - WASHROOM SERVICES - WASHRO	IOM SERVICES	
Starts		26/05/2015

Pay

On selecting the *Pay* option, the employee pay details are displayed, with the ability to drilldown into the employee details via clicking on the *Tap for more info* text.

iPad 🗢	10:59			78% 🔳
\equiv	Employees		<	
MUGG & BEAN				
MOGG & BEAN				
8326 - DIANA DAVIDS - NO APPROVAL				
Tap for more info			8326 - Diana Davids	- No approval
Task			1 - Daily o	ffice cleaning
Work type				Manager
Effective			01/06/2	017 - Not set
Holiday method				Basic
Pay type			Default me	thod - Actual
		Hours	Rate	Cove
	Manalau			
	Monday Tuesday	8.50 8.50	13.50 13.50	0.0
	Wednesday	8.50	13.50	0.0
	Thursday	8.50	13.50	0.0
	Friday	8.50	13.50	0.0
	Saturday	0.00	0.00	0.0
	Sunday	0.00	0.00	0.0
8952 - ELIAS ELLIOT - NO APPROVAL				
Tap for more info			8952 - Elias Elliot	- No approval
Task			1 - Daily o	ffice cleaning
Work type				Cleaner
Effective			01/06/2	017 - Not set
Holiday method				Basic
Pay type			Default me	thod - Actual
		Hours	Rate	Cove
	Monday	8.00	8.50	0.0
	Tuesday	8.00	8.50	0.0
	Wednesday	8.00	8.50	0.0
	Thursday	0.00	0.00	0.0
	Friday	0.00	0.00	0.0
	Saturday	0.00	0.00	0.0

Roster

On selecting the *Roster* option, the roster details are displayed for the current week with the ability to move to the next or previous week via clicking on the *arrow* icons:

iPad 🗢		11:14					77% 🔳)	
\equiv	Roster					<	企	
MUGG & BEAN								
	Mon	Tue	Wed	Thu	Fri	Sat	Sur	
8326 - Diana Davids	8.50	8.50	8.50	8.50	8.50	0.00	0.00	
8327 - Mohamed Marley	5.00	5.00	5.00	5.00	4.00	0.00	0.00	
8329 - Parminder Peters	6.00	6.00	7.00	7.00	0.00	6.00	8.00	
8330 - Mohamed Madison	8.00	0.00	6.00	5.50	5.50	9.00	8.00	
8331 - Kumari Koekemoer	8.00	8.00	0.00	8.00	8.00	8.00	8.00	
8333 - Maria Marais	8.00	8.00	8.00	8.00	7.00	7.00	0.00	
8658 - Juan Jones	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
8952 - Elias Elliot	8.00	8.00	8.00	0.00	0.00	0.00	0.00	
9077 - Suraj Stevenson	0.00	6.00	6.00	6.00	6.00	8.00	8.00	
9078 - Eugenio Edgars	5.00	0.00	5.00	5.00	5.00	10.00	10.00	
9301 - Jose Jameson	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
9317 - Susy Smith	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Selecting an employee from the *Roster* option allows drill down into the employee details.

Billing

On selecting the *Billing* option, the contract billing details are displayed.

Pad ᅙ	11:20	76%
\equiv	Billing	く 🟠
MUGG & BEAN		
BILLING FOR - 1 - DAILY OFFICE CLEANING		
Text		Period:&DF - &DT
Effective		26/05/2015
Frequency		1 Months Advance
Price		0.00
Monthly		0.00
Annual		0.00
PO ref		15397/15409
Address to		Mugg & Bean
BILLING FOR - 1 - DAILY OFFICE CLEANING		Daily Centre Cleaning
Effective		26/05/2015
Frequency		1 Months Advance
Price		25606.03
Monthly		25606.03
Annual		307272.36
Address to		Mugg & Bean
BILLING FOR - 2 - RE-CHARGEABLE GOODS		
Text		Estimated Washroom Consumables
Effective		26/05/2015
Frequency		1 Months Advance
Price		500.50
Monthly		500.50
Annual		6006.00

Equipment

On selecting the *Equipment* option, details of all the equipment items available on the site displayed.

iPad 🗢	11:59	71% 💷 🖯
	Equipment	く 🟠
MUGG & BEAN		
NON STANDARD EQUIP!	MENT - NON STANDARD EQUIPMENT	
Equipment		Floor Machine
Supplier		PB-VAC LIMITED
Purchased		21/10/2014
PAT		01/01/0001 - 01/01/0001
STANDARD EQUIPMENT	- EXTENSION LEAD	
Equipment		EXTENSION LEAD 15 MTR
Supplier		PB-VAC LIMITED
Purchased		05/02/2015
PAT		01/01/0001 - 01/01/0001
VACUUM EQUIPMENT -	VACUUM EQUIPMENT	
Equipment		AS200B VACUUM CLEANER
Supplier		PB-VAC LIMITED
Purchased		05/03/2015
PAT		01/01/0001 - 01/01/0001

Quality Audit

The Quality Audit section of the Site Manager will show the user QA's to complete as well as any historic QA's.

QUALITY AUDIT LIST

On entering the Quality Audit option, Quality Audits are displayed in two lists:

- **To Do** list of **QA's** that can be completed by the current user; these could comprise not only those QA's assigned to the current user on CMS but also any QA's which the current user has authority to amend, by being assigned to a (subsequent) node with
- All list of all QA's that have been completed, by the current or other users, but only for those sites the current user is authorized to
- Plus the '+' icon allows the user to create a new one-off QA for the selected site.

iPad 🌩		5:02		_	A	1	56%
=		As	(\pm)	V	$_{z}^{A}\downarrow$	<	奋
	Q, si	earch					
09/11/2017							
QA: New Mugg & Bean Generic one off 09/11/2017 To 09/11/2017							
							J
							09/11/2017
,			_				
	Te do						

- Filter this allows the user to search for a specific site or QA.
- Sort allows the user to sort the list alphabetically and in ascending/descending order
- Back allows the user to go back to the previous screen
- **Home** this will take the user back to the Home screen and menu options.

QUALITY AUDIT FORMS

The main **QA** details are displayed on the initial **Header** tab, with auditors needing to enter the **Results** and **Sign off** tabs to complete the Quality Audit:

iPad 🗢	14:54 57	57% ■) iPad 夺	15:31		100%
=	Quality audit: New Mugg & Bean 🛛 🔡 🧹 👔		Quality audit: New Mugg & Bean		
Quality audit	New	Required			
Client	PAVILION TRUSTEES LTD & PAVILION	09/11/2017	To 09/11/2017		
Contract	Mugg & Bean	Any time			
Site	Mugg & Bean Pavilion shopping centre Sevenoaks TN13 3UE	Any une			
Template	Generic				
Frequency	0 Days				
Title	Generic one off				
Task	1 - Daily office cleaning				
	Header Scheduling Results Sign off			2v	

From here the user can complete scheduled QA's.

QUALITY AUDIT RESULTS

The initial **Results** screen will display all top-level areas on the **QA** and once an area is selected the results grid is filtered down to just display the items within the selected area.

iPad 穼		15:10				55% 💶 🗅
=	Quality au	dit: New Mugg & E	ean 🍸		<	命
		Q search	1			
• Reception						
• Lifts and Lift	Lobbies					
• Washrooms						
• Staircases						
O Managemen	t Suite					
• External						
	Header	Scheduling	Results	<u>Der</u> Sign off		

Pad 🗢	15:10 QA: New		<	55%
←	Reception			_
←	Area selected, swipe for items			_
Reception Score			\odot	
1. Unsatisfactory 2. Satisfactory-minor i	sues			
4. Not audited		ĕ		
3. Satisfactory -no issu	ues	Õ		
Comments				
Fault code				
(Not set)				
Images				

The user can **swipe left** or **swipe right** to move through QA areas **OR** QA items and score each QA are area or QA item as needed.

iPad 중	15:44			100% 💼
\equiv	QA: New		<	企
←	Lifts and Lift Lobbies			\rightarrow
←	Area selected, swipe for items			\rightarrow
Lifts and Lift Lobbies Score			\odot	
1. Unsatisfactory 2. Satisfactory-minor issue		\bigcirc		
4. Not audited	5			
3. Satisfactory -no issues		ŏ		
Comments				
Good				
Fault code				
(Not set)				
Images				

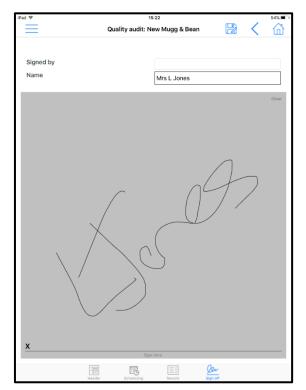
Comments, Fault codes and Images can be added to each QA Area or QA item, as required.

When Images are added, a picture can be taken or one can be included from the camera roll.

QUALITY AUDIT COMPLETION

Once all **QA items** have been scored and any failures had comments, plus optionally pictures taken, the user can progress to the **Sign off** tab.

Once a signature has been supplied (if the client is present or 'No Signature Given' if not) and a name entered, the QA can be saved:



QUALITY AUDIT ONE-OFF

Users can generate one-off **QA's** via selecting the '*plus'* icon and choosing a predefined **QA template**:

iPad 🗇	15:02				56% 💷)	iPad 😤	15:02	_		56% 🔳
=	QAs	÷ 7	$\stackrel{A}{z}\downarrow$	<	命		Template selection		1	奋
		<u> </u>	2 🗸		ш					ш
	Q search						Q search			
09/11/2017						G				
QA: New Mugg & Bean						Generic				
Generic one off										
09/11/2017 To 09/11/2017						Generic				
NEW										
						н				
						Health and Safety Audit				
						Health and Safety Addit				
						0				
						One-Off Shopping Centres	Are you sure?			
							Are you sure you wish to create a new QA?			
						S	QA?			
					09/11/2017	Shopping Centres	No Yes			
						Site Compliance Audit				
	~	(==1)								
	õ a da									
	0.00	PC1								

Stores Order Requests

Stores order requests (SOR's) are displayed in three lists:

- To Do list of SOR's that need to be completed by the current user
- **To Deliver** List of SOR's that have been completed and the stores order is at the status of 'Awaiting delivery' or 'Part delivered'.
- **All** list of all SOR's that have been completed, by the current or other users, but only for those sites the current user is authorized to

STORES ORDER REQUESTS - CREATION

The user can also generate Store order requests via selecting the '*plus*' icon and choosing a predefined **Stores Order** *template:*

Stores Order Requests C. search C. search Request number New Cleat Test Request number New Cleat Test Request number New Cleat Test Contract Required date Tigt2017 PO ref Stores templates Stardard Stardard 	d 🕈	15:39		51% E	Ne Source 10	19-48		/20
□ south M Request number Contract Contract Type Overat Required date 100 ceft Required date 100 ceft Stered templates Stered templates	=		÷ <		\equiv	Stores order request: New	× 🔡	< 6
M Client Test Contract Frank's Sites Site Test Viorhall 0 Contract Required date 18/10/2017 PO ref PO ref Steres templates Steres templates Standard		Q search	- 、		Request number	New		
M Request New Mugg & Bean Order and Site Type Orderact Storest Required date TarNo2017 Poref Stores templates Luxury Products Standard				_				
Request: Naw Mugg & Bean Crieter M Crieter M Site Test Type Direct Workbill Contact Required date 10:r0q2017 PO ref Contact Required date 10:r0q2017 PO ref Contact Cont	N							
Charles IN Street Stree	Request: New Mugg & Bean							
Type Direct Workbill 0 Contact Required date 10/10/2017 PO ref Stores templates Luxury Products Standard	Order: NA							
Workbill Contact Required date 18/10(2017 PO ref Stores templates Luxury Products Standard	NEW				Type	Direct		
Contact Contact Required date I3(70(2017 PO ref Stores templates Laxury Products Standard								
Required date 19/10/2017 PO ref Concestemplates Luxury Products Standard Standard					workbill	0		
M Exercise Constraints					Contact			
PO ref Stores templates Luxury Products Standard					Required date	19/10/2017		
Stores templates					PO ref			
Luxury Products								
Standard					Stores templates			
Standard				м	Luxury Products	\bigcirc		
					Standard	\bigcirc		
to de To definer All		To de To deliver						

STORES ORDER REQUEST – PRODUCTS

On selection of the **Stores Order template** the user will be presented with a list of products, by category from where the user can use the 'slide bar' next to each product to select it.

iPad 🗢	15:54				49% 🔳 🔿
	Stores order reques	t: New	\checkmark	<	奋
	Q search				
Cleaning Chemicals : Carpe	t Cleaners				
RCSMAT176 : ENHANCE EXTRACTIO 2X5LTR 411100	N CLEANER	\bigcirc			
RCSMAT4 : NEUTRAL PRO SPOTTER	2				
Cleaning Chemicals : Degre	aser				
RCSMAT27 : BRILLO CONC. CLEANE 2X5LtTR 7511566	R DEGREASER	\bigcirc			
Cleaning Chemicals : Desca	ler				
RCSMAT200 : DESCALER-QUICKSHI SACHET	NE-SINGLE DOSE	\bigcirc			
RCSMAT31 : CLOVER BREAKER 12X1 DESCALER	LTR CLEANER				
Cleaning Chemicals : Disinfe	ectant				
RCSMAT40 : E-PINE 2X5 LTR PINE D A008EEV	ISINFECTANT				
RCSMAT45 : LIFEGUARD CLEANER D 5Ltr	DISINFECTANT	\bigcirc			
Cleaning Chemicals : Floor M	Maintainer				

Once the required products have been selected click on the '*tick*' icon to build the product list from where the required quantities can be entered. The user will also be able to see the product costs on this screen:

Pad ᅙ	15:54		49% 🔳 🔿
\equiv	Stores order request: N	lew 🔡	く 🟠
Add	New		
Cleaning C	hemicals : Carpet Cleaners		
RCSMAT4	: NEUTRAL PRO_SPOTTER		
Cost	Requested	Total cost	
£5.42	2 - +	£10.84	
Cleaning C	hemicals : Descaler		
RCSMAT3	1 : CLOVER BREAKER 12X1LTR CLEANER DES	SCALER	
Cost	Requested	Total cost	
£2.34	1 - +	£2.34	
Cleaning C	hemicals : Disinfectant		<u>ا</u>
RCSMAT4	0 : E-PINE 2X5 LTR PINE DISINFECTANT A00	8EEV	
Cost	Requested	Total cost	
£1.85	5 - +	£9.23	
		\odot	
	Header Products	Confirm	

STORES ORDER REQUEST - CONFIRMATION

Once the required quantities have been entered on the above screen the user can click on the '**Confirm**' icon.

The from the confirmation screen the user can enter comments and then click on the '*Flag*' icon to continue.

iPad 중	15:54		48	8% ■_>	iPad 🗢	15:54			48% 💶)
\equiv	Stores order request: New	1000		â	\equiv	Stores order request: New	1000	<	企
Comments					Comments				
Needed asap					Needed asap			 	
						Are you sure?			
						Are you sure you wish to confirm this stores order request?			
						No Yes			
H	Header Products Confirm	m			Hez	rder Products Confirm			

Workbills

The **Workbill** option allows users to see existing **workbills** for their sites. In addition to this the user can also raise quotes whilst on site with the client for any additional work that may need to be carried out. Approval of quotes via workflow can be setup from the main system if required.

No Service 🗢	15	:57		61% 💻)	No	Service 🗢		15:	57			61% 💶 🖓
\equiv	Workb	ill: New	\times	く 命		=		Workbil	: New		<	ŝ
				х ш								
Workbill	New					Nork instruct	tion					
Client						Test						
Contract Site	Template Cont Test	ract			(Customer wo	ork instruction					
Site	lest											
					'							
Quote												
Material usage	\bigcirc											
Title												
Task												
PO ref												
Assign	Site employee											
	-	三		\odot			Contacts Work	Es	ΞΞ	-	<u>e</u>)	\odot
Leader Contac	ts Work Scheduling	Aution Coete	Photos	Confirm	1 1	Header	Contacts Work	Scheduring	Action	Costs	Photos	Confirm

Document Ref: TEAM TemplaCMS - Mobile v2.docx Version: \circledast Copyright 2021 TEAM Software by WorkWave

The user can also confirm that work has been carried out, providing photo evidence if required. When selecting the **Photo** option, the user will be prompted to choose **Before**, **During** or **After** - this is to record at which point of the work the photo was taken.

	AI	Workbill: 8612	25	<	1
6	AI				山
		Please select the image Before During After	e stage:		
-EE Header	(A.M.)	 5			Qer

At the point of completing the workbill the user can capture the signature from the client.

id 🗢		14:06				61% 🔳
\equiv	Work	bill: 86125	1000		<	命
6						
Signed by		(someone e	else)			
Name		Mr R Smith				
Status						
Notes						
Completed satisfactor	У					
						Clear
			1	/		>
		1		ł		
			$\backslash \nearrow$	≤ 1		
	1		T	J		
		\frown		_		
XI	C		$\overline{\ }$	1		
<u> </u>	(N	/			
11-/		λ.				
$\mathbb{N}($		\mathbb{N}				
		\sim				
		/				
	Í					
x						
<u></u>	s	ign here.				
			A	21		0er

Equipment Audits

The *Equipment Audits option* will display all known *Equipment items* at a given site, the user will be able to properties, update details such as PAT testing dates, change the status and add any photos where applicable.

Service 👳	16:30			66%
=	Equipment audit: New		<	奋
Equipment				
Supplier				٦.
Category				
Asset no				
Purchased	Not set			
Last PAT	Not set			Ē.
Next PAT	Not set			۲
Status	Auto create			-
Properties				
Images				
🔍 Images				
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Service Requests

The *Service Request* option allows mangers to raise complaints, compliments, general enquires etc., which can trigger *Action Requests* which is fully customisable within the main system. The application will allow the manager to complete Action Requests (where applicable) and add notes onto the actions request that are assigned to them.

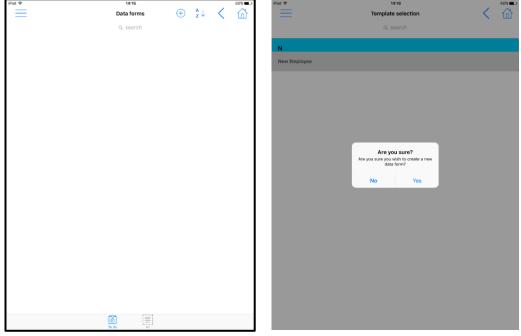
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Reference			 	Note				
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SR group								
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Data Forms

Data Forms could be employee-level or client/site-level:

- Site level details, e.g. Door Access Codes, etc.
- Site level contact
- New Employee Details these can be setup to create Employees
- Change of employee details, e.g. address, bank details, etc.
- Contract Pay Amendments these can be setup to update the Contract
- Holiday Requests these can be setup to update the Employee Planner

A new **Dataform** can be created via clicking on the '**plus**' icon at which point the user will be prompted to select the relevant **Dataform template** to complete.



The user must complete mandatory elements on the form before he is able to mark the form as completed:

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Employee Deta	ils			
Title	First Name	Second Name	Family/Surname	
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Address				
Town			Te	st
County				
Post Code				
Contact to	lephone number			
Contact te	lephone number			
E Mail Add	ress			
I understand that r employment and th	ny email address is held secur e company activities.	ely by Regular Cleaning and will only be used b	y the company to provide me with inform	nation relevant to my
Natioanl In	surance	Gender	Not set	
Marital Status	Select	Nationality	Ethnic Origin	
Do you have any vi	sa work restrictions?	Select	Do you have a Student Visa?	Select
If yes you are re-	wired to provide a letter fro	m the college you are attending which con	firme your term datee	
n yes, you are re	failed to provide a letter fre	in the conego you are attending which con	inning your term cates.	
Emergency Co	ntact Details			
Name:	Name		Relationship	
Telephone number	:	Tel. number		
Bank Details		-		
			0	
		Header Results	Sign off	

Staff Training

Staff training forms are created on the main system and distributed to the mobile devices. Training forms will allow users to add single or multiple employees (depending on set up of the training form).

The *Results* tab will outline the area in which the employee has been trained on.

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On completion the Trainer and the Trainee will be prompted to sign the form. If this Staff Training was for a group of trainees, then each trainee will be asked to sign the form, with discrete training records created for each trainee (employee) once imported into TemplaCMS.

EMPLOYEE MANAGER

Although majority of the use of the mobile application is within the *Site Manager*, there will be occasions in which the user will need to view employee information which can be accessed directly from the *Employee Manager*:



Employee List

The *Employee Manager* will display a list of employees that are assigned to the user's sites (based on the contract assignments):

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8389 - Agustin Nozon			
9393 - Ali Muhiyaddiin			
8482 - Ama Kouame			
9083 - Amanjoot Hothi			
8400 - Andrew Scott			
В			
8383 - Bayani Capina			
9342 - Beatriz Saracho Delgac	o		
8363 - Bozena Tarka			
с			
8805 - Carlos Cadiz Quilodran	1		
8620 - Carlos Betancurt Arias			
9127 - Carlos Moncada			
9240 - Carol Muggeridge			
9190 - Cesar Urbina Rivas			

Employee Details

Within here you are able to access all the information that you have gained from each employee such as:

- Telephone/Mobile Number
- Email Address
- Emergency Contact and number
- Employee Photo

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	Employee info	く 企
Back		
Home		**670 - Jim Smith
-		1 Smith Lane
		Templa Middlesex
Employee info		
Service requests		
Staff training forms		
Data forms		
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**670 - JIM SMITH		
Employee		**670 - Jim Smith
Address		1 Smith Lane Templa Middlesex
Telephone		
Mobile		
Email		
Emergency contact		
Emergency number		
PROPERTIES		
Probation expiry date		24/10/2017
Reason for Leaving		
Photo ID type Photo Provided		
Photo Provided		
Permit to work Expiry Date		
Nationality		
Ethnicity		
Proof of Address		
Proof of Bank Account		
RCS ID Card Issued		
Reference 1 Received		
Reference 2 Received		
Induction		
Appraisal Review date		

Employee Actions

The user is also allowed to see any transactional data that relates to the employee:

- Service Requests (that are employee-level assigned, not site-level assigned)
- Data Forms (that are employee-level assigned, not site-level assigned), e.g.:
 - New Employee Details these can be setup to create Employees
 - Contract Pay Amendments these can be setup to update the Contract
 - Holiday Requests these can be setup to update the Employee Planner
- Staff Training Forms

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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.