

Mobile Overview v2

TEMPLACMS

Version: v.2.0.0 (October 2018)



COMMERCIAL STATEMENT

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INTRODUCTION

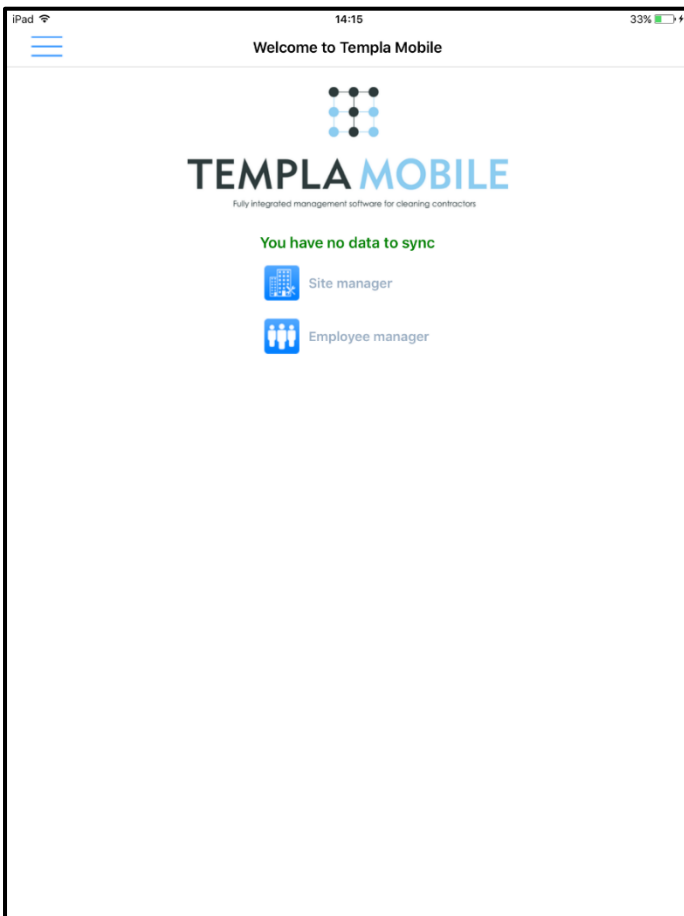
These training sessions notes & are designed with the intention of providing background information and useful hands on experience of using general CMS functions and the CMS payroll module.

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

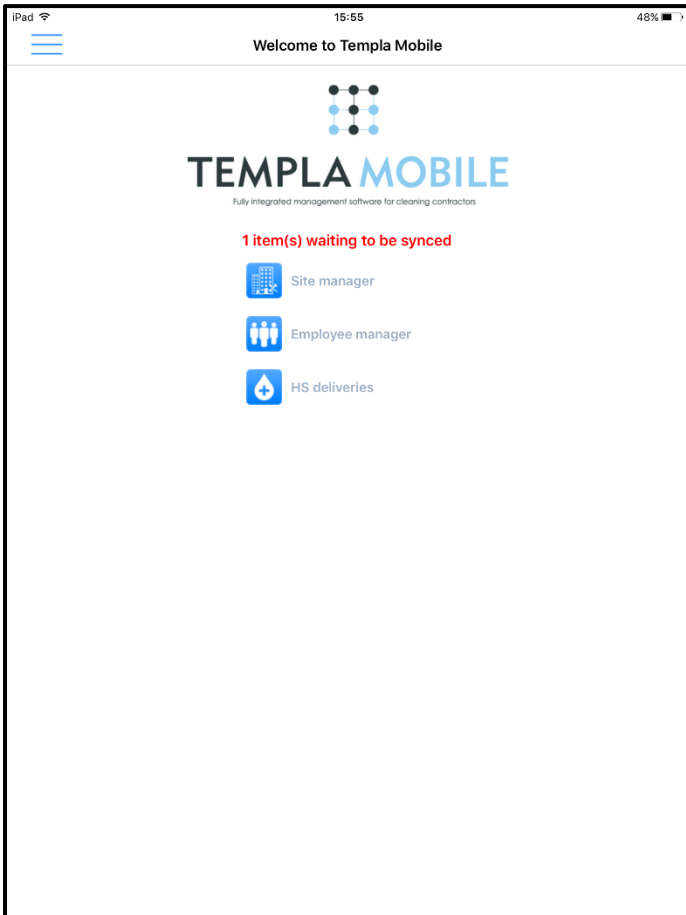
TEMPLA-CMS SIGNON

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.



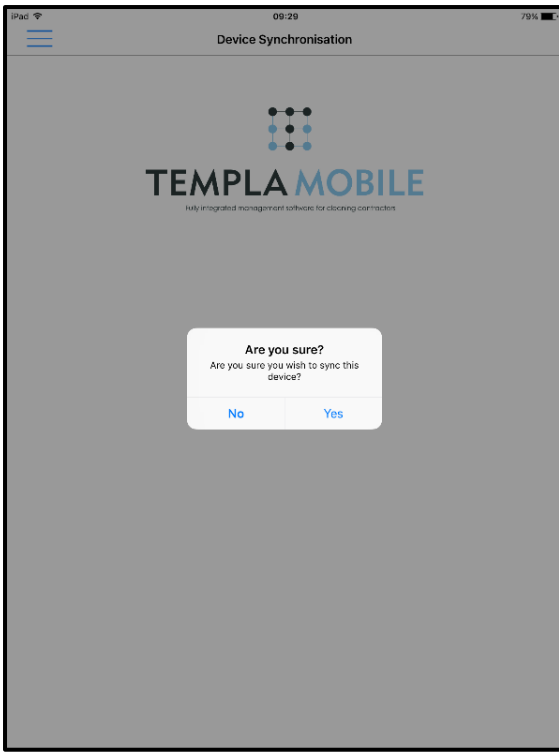
Synchronisation

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

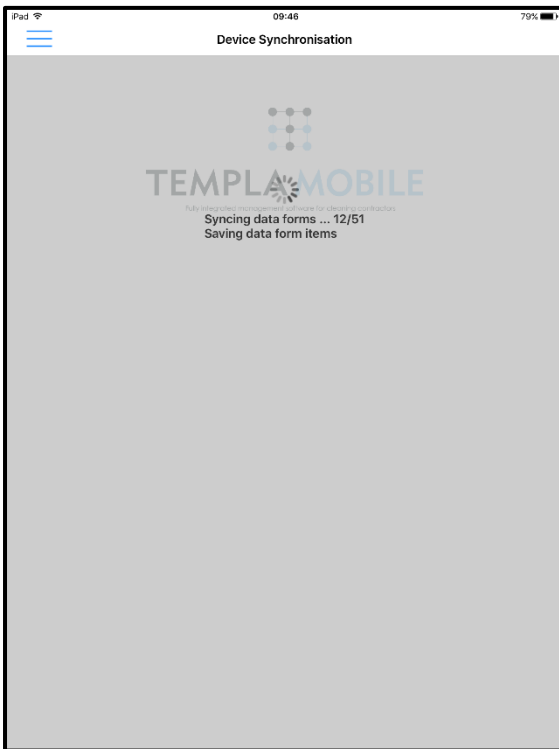


- A **Partial sync** will only send items from the *device* back to the *main server*
- A **Full sync** will full will download items from the main server and send items from device back to the server.

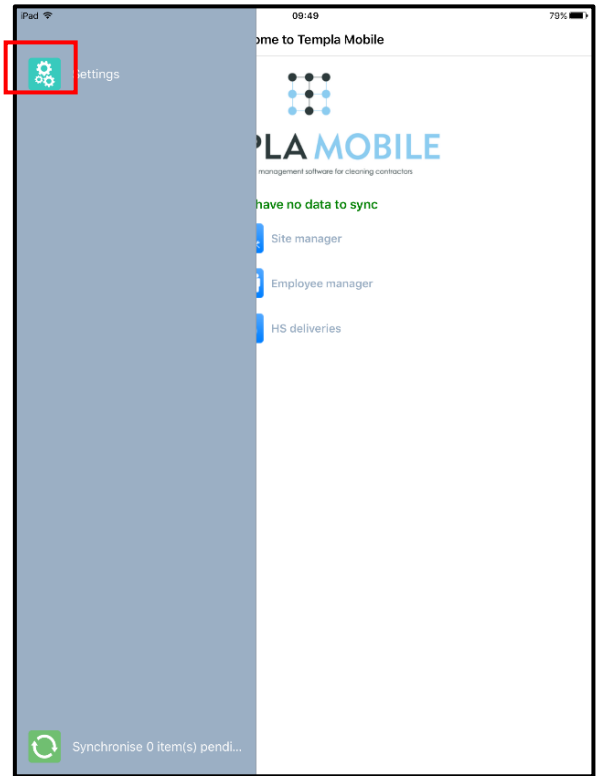
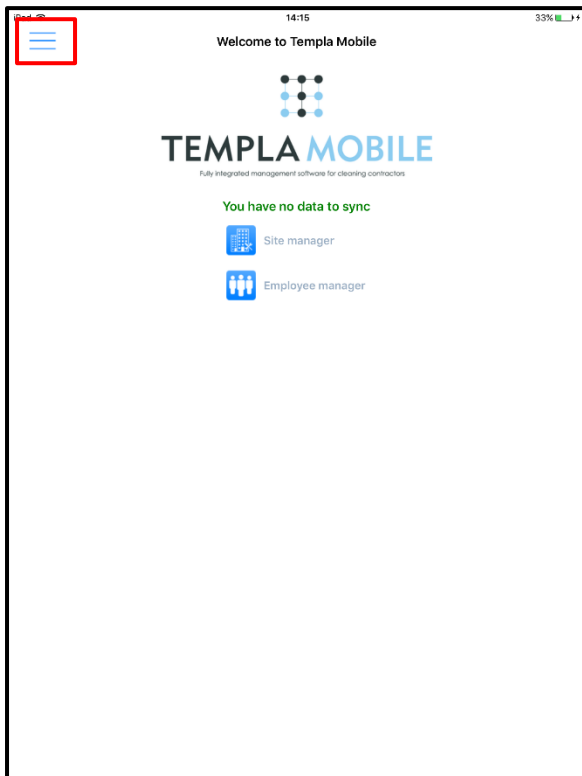
On selecting the relevant sync option, the user will be presented with the following screen:



Click on **Yes** to continue:



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



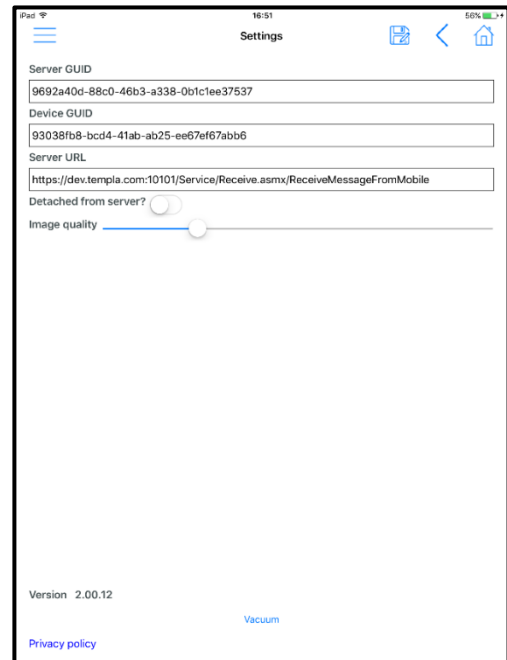
Configuration Screen

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



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



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

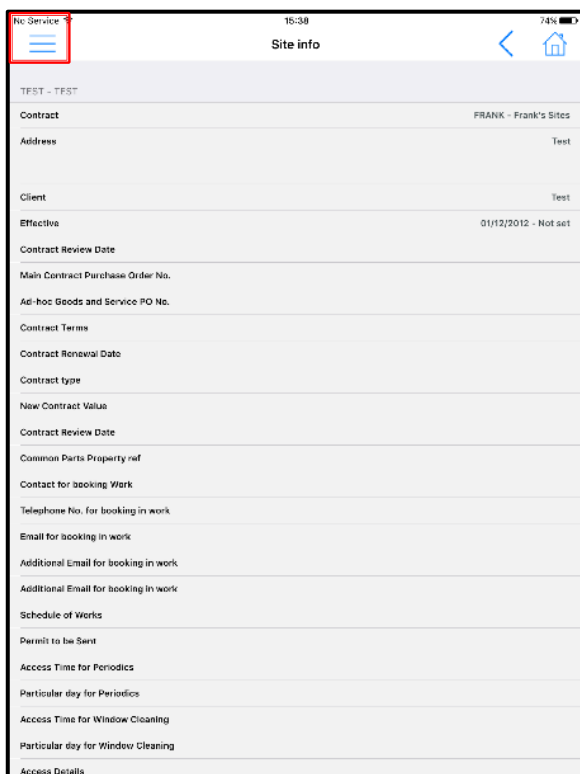
Sites

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:

The screenshot shows the 'Site Manager' mobile application interface. At the top, it displays 'iPad', signal strength, '09:59', 'Site Manager', a back arrow, a home icon, and '79%' battery. Below the header is a search bar with a magnifying glass icon and the text 'search'. The main content area is a list of sites, each with a blue header bar containing a letter and a white row containing the site name and its postcode. The sites listed are: 1 (152-154 High Street - Staines, TW18 4AH), B (Blenheim Centre, TW3 1NL), C (Car park A & B - The Bentall Centre, KT1 1TP), Centre Court Shopping Centre (SW19 8YA), E (Elmsleigh Shopping Centre, TW18 4QB), H (Hersham Green Shopping Centre, KT12 4HL), Houndsditch - Cutlers Exchange (EC3A 7BU), K (Kings Mall Shopping Centre, W6 9HW), M (MP Real Estate W6 Car Park, W6 9HW), and P (Palace Exchange Shopping Centre, EN2 6BP). On the right side of the list, there is a vertical index of letters: 1, B, C, E, H, K, M, P, R, S, T, W.

Letter	Site Name	Postcode
1	152-154 High Street - Staines	TW18 4AH
B	Blenheim Centre	TW3 1NL
C	Car park A & B - The Bentall Centre	KT1 1TP
	Centre Court Shopping Centre	SW19 8YA
E	Elmsleigh Shopping Centre	TW18 4QB
H	Hersham Green Shopping Centre	KT12 4HL
	Houndsditch - Cutlers Exchange	EC3A 7BU
K	Kings Mall Shopping Centre	W6 9HW
M	MP Real Estate W6 Car Park	W6 9HW
P	Palace Exchange Shopping Centre	EN2 6BP

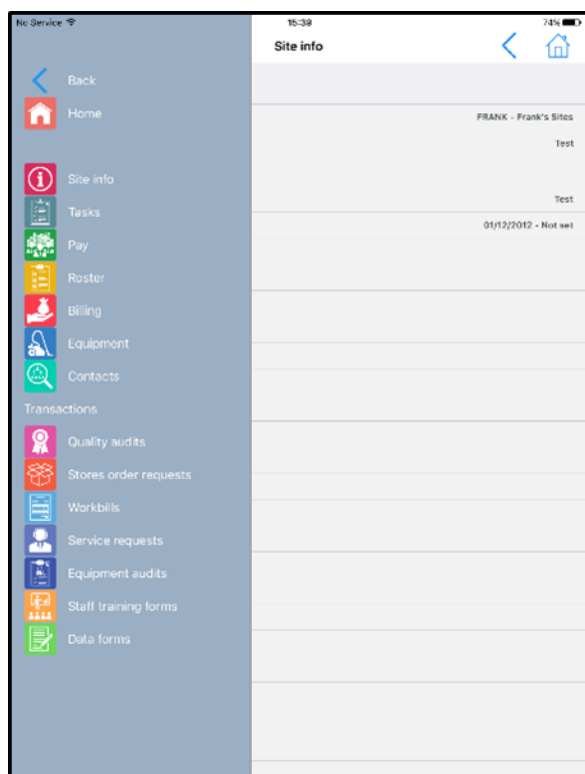
On selecting a **Site** the user will be presented with the main site information such as contract name, address, contact details, user defined properties, effective from and to dates, Site analysis details etc.:



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.

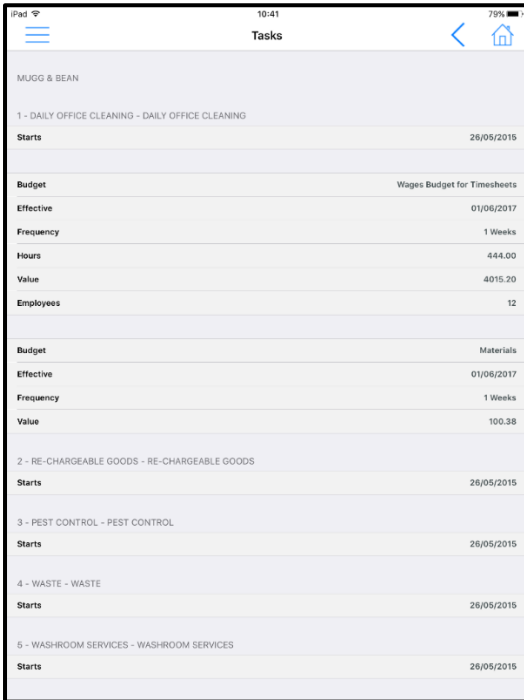
In addition to the above, if allowed, the user will also have access to the transactions for the site such as **Quality audits, Stores order requests, Workbills, Service requests, Equipment audits, Staff training forms** and **Data forms**.

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.



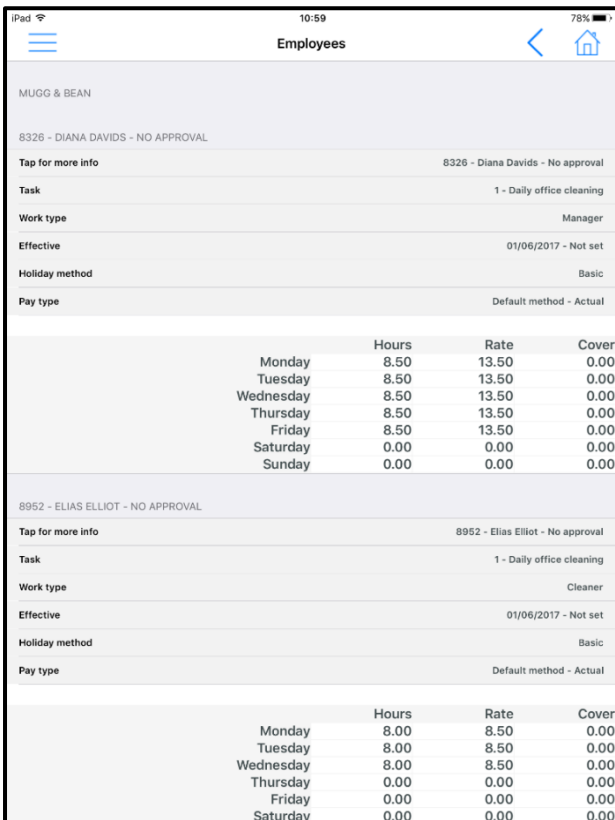
Tasks

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



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.



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:

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
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.

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	
Text	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.

NON STANDARD EQUIPMENT - 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

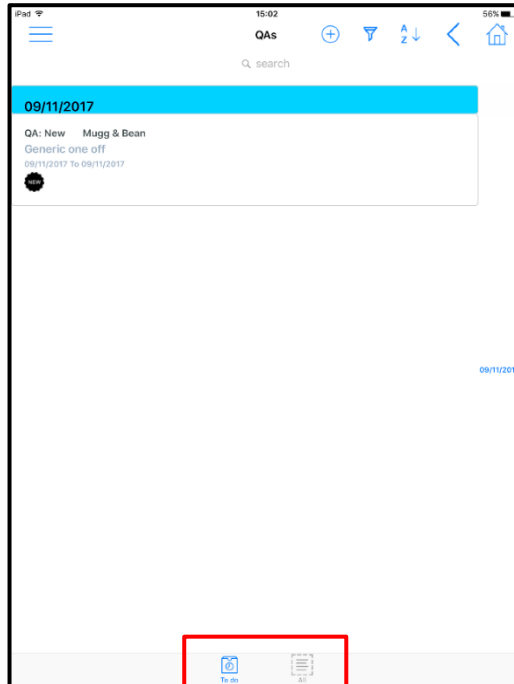
Quality Audit

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:

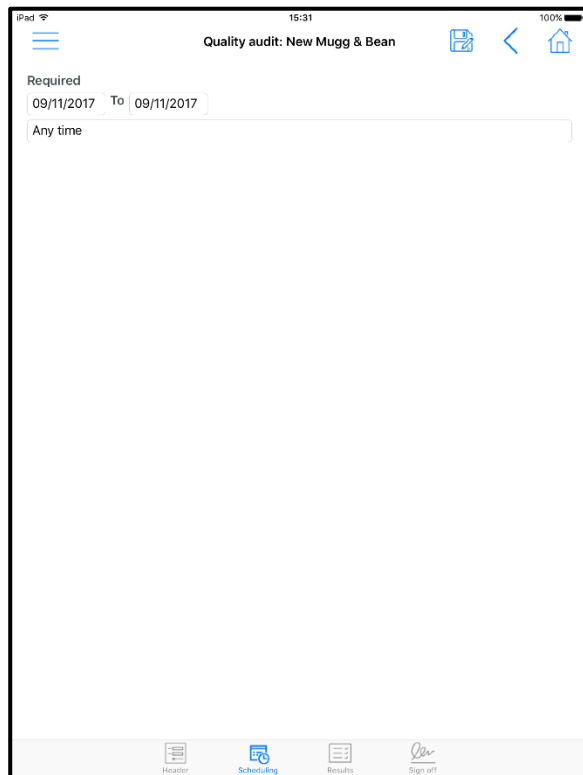
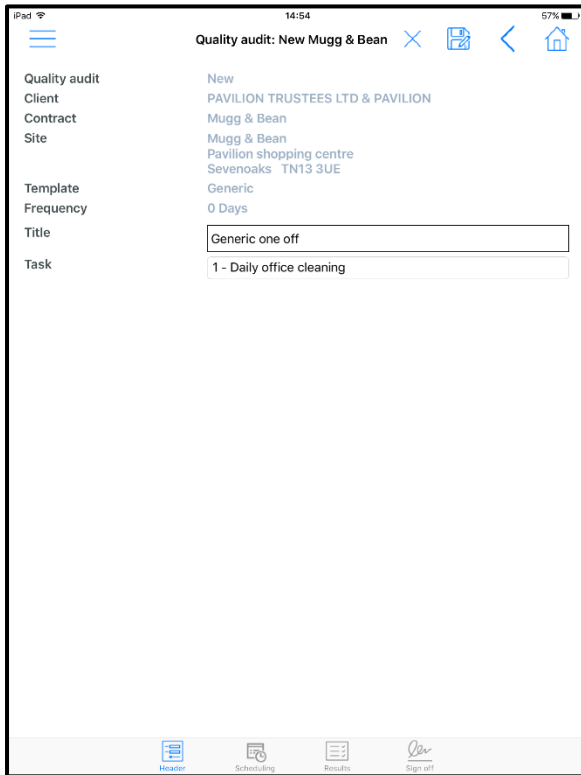
- **To Do** – list of **QA's** that can be completed by the current user; these could comprise not only those QA's assigned to the current user on CMS but also any QA's which the current user has authority to amend, by being assigned to a (subsequent) node with
- **All** – list of all **QA's** that have 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.



- **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

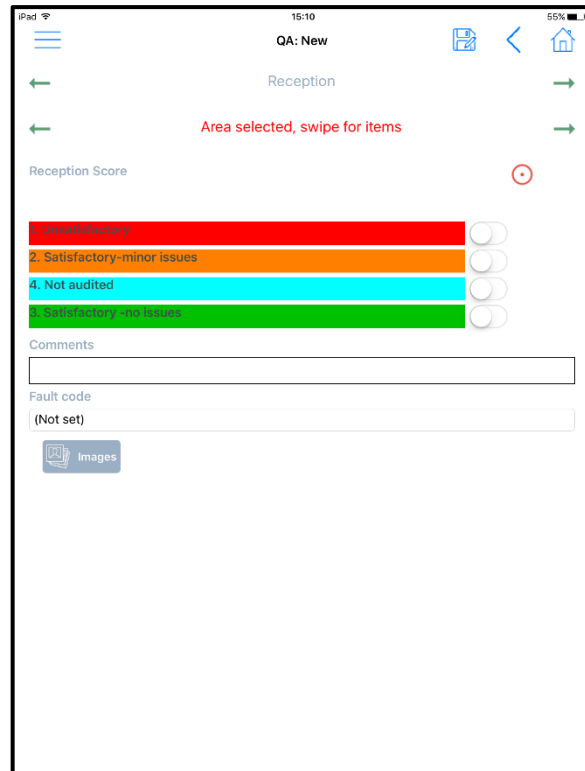
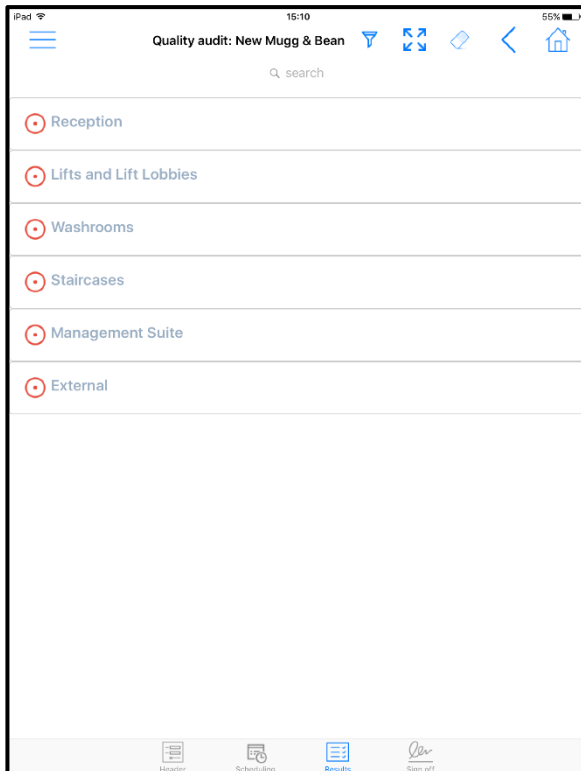
The main **QA** details are displayed on the initial **Header** tab, with auditors needing to enter the **Results** and **Sign off** tabs to complete the Quality Audit:



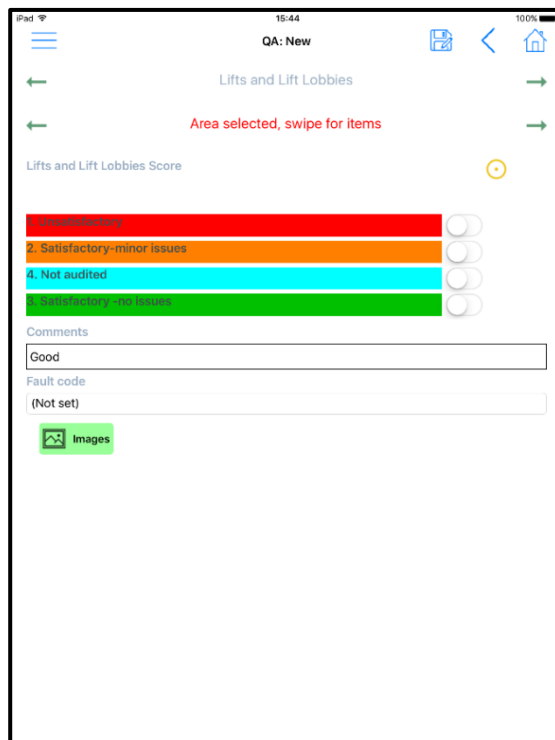
From here the user can complete scheduled QA's.

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.



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



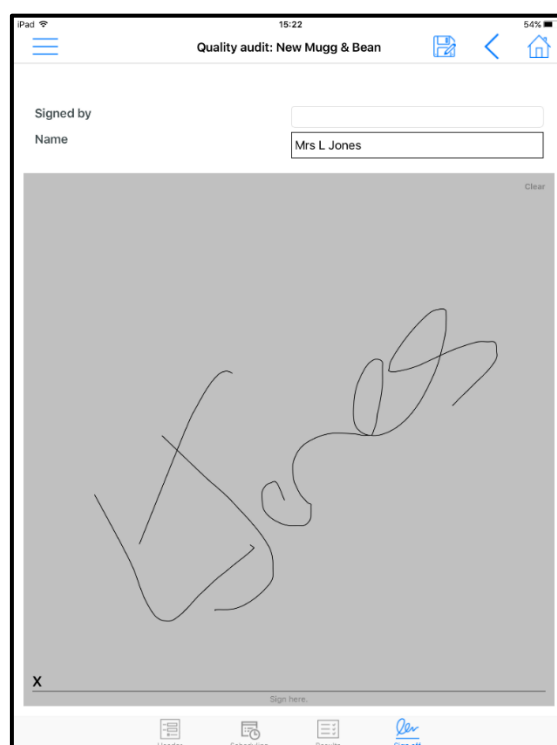
Comments, Fault codes and Images can be added to each QA Area or QA item, as required.

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

QUALITY AUDIT COMPLETION

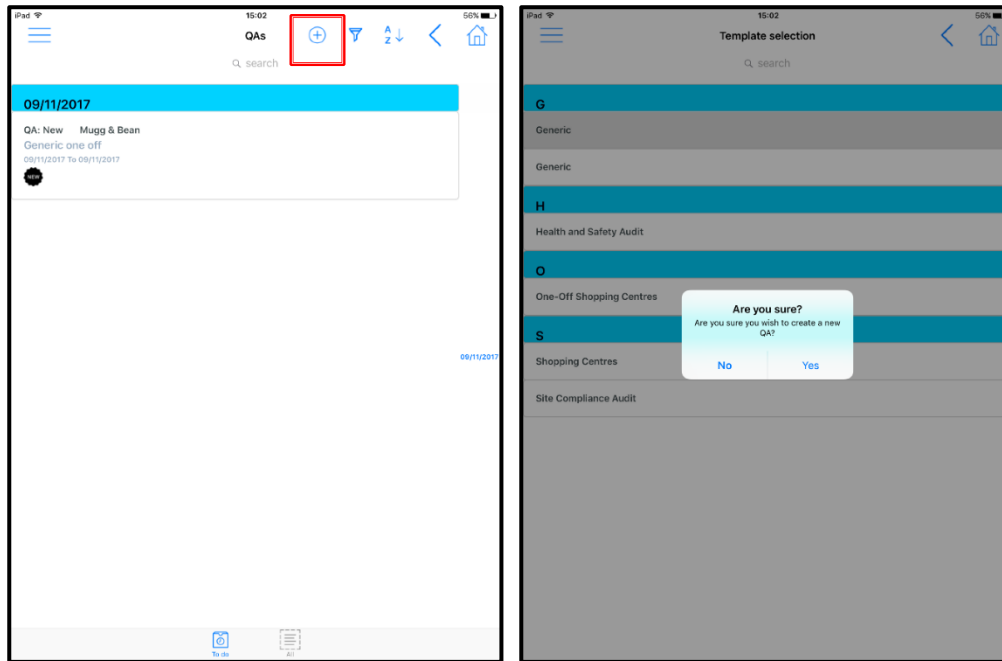
Once all **QA items** have been scored and any failures had comments, plus optionally pictures taken, the user can progress to the **Sign off** tab.

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:



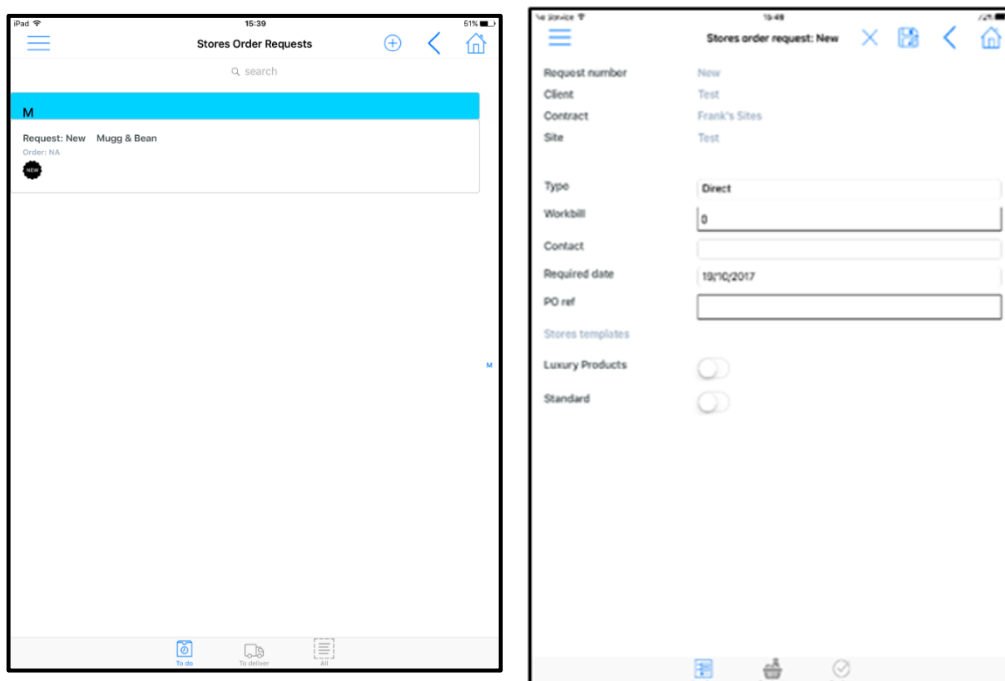
Stores Order Requests

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

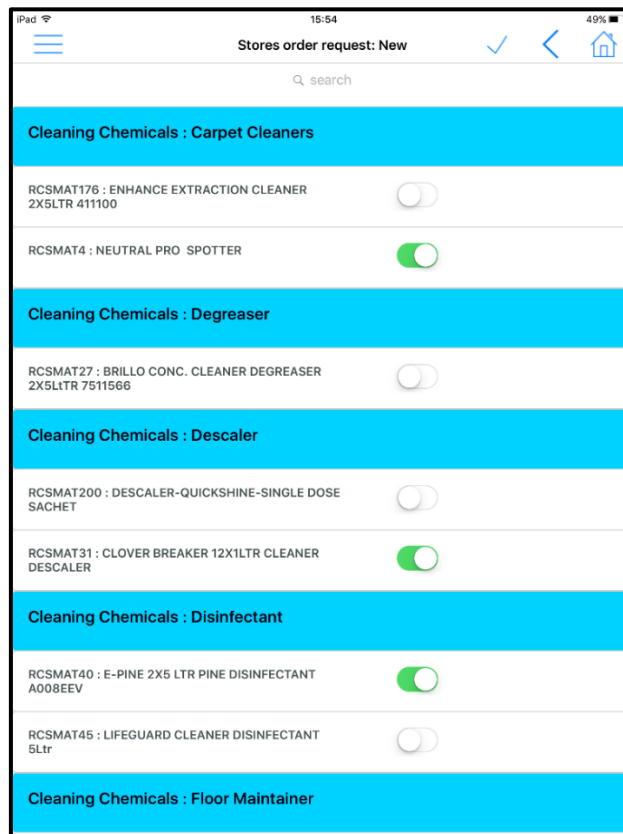
STORES ORDER REQUESTS – CREATION

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

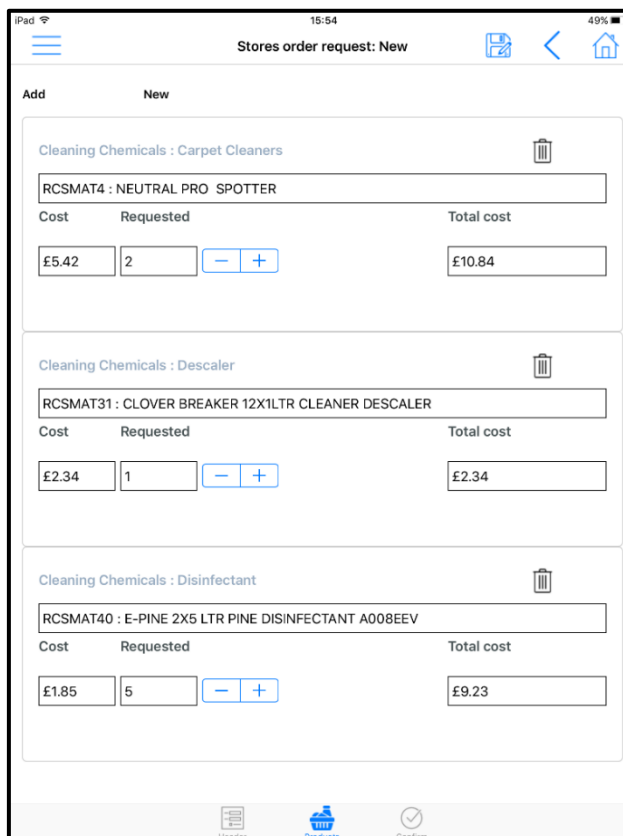


STORES ORDER REQUEST – PRODUCTS

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.



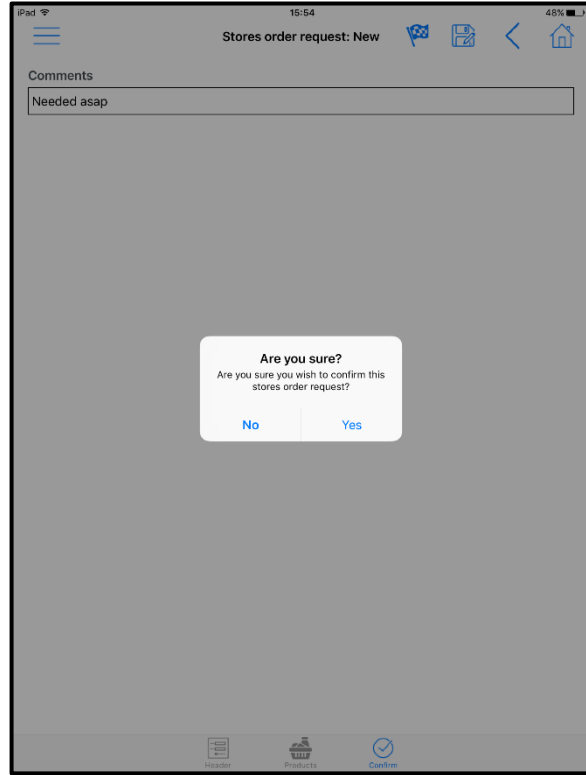
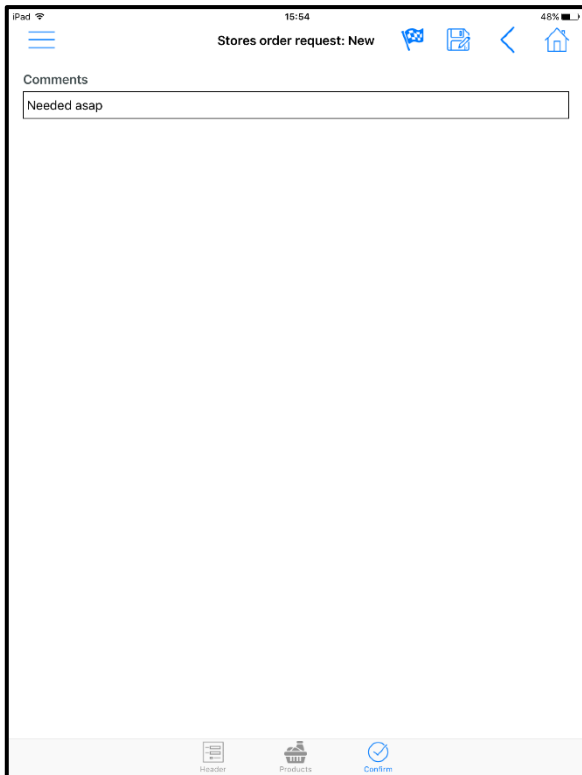
Once the required products have been selected click on the **'tick'** icon to build the product list from where the required quantities can be entered. The user will also be able to see the product costs on this screen:



STORES ORDER REQUEST – CONFIRMATION

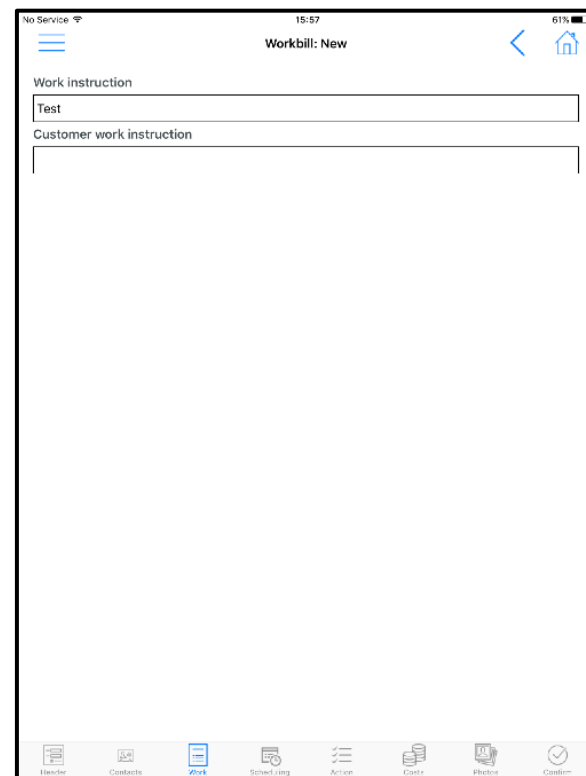
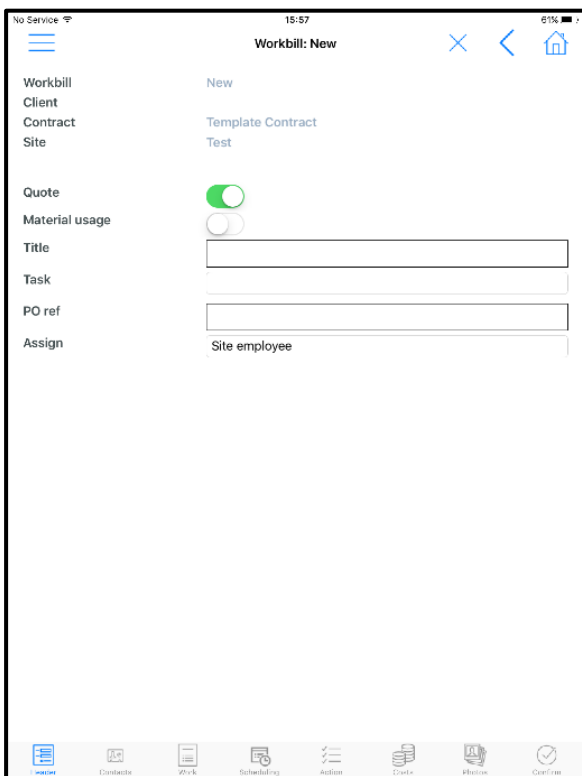
Once the required quantities have been entered on the above screen the user can click on the '**Confirm**' icon.

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

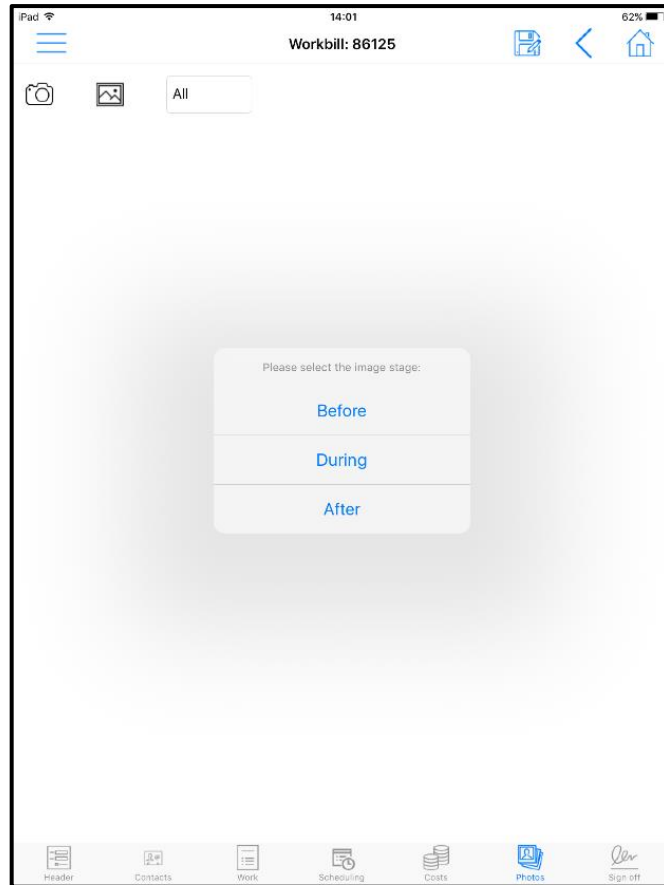


Workbills

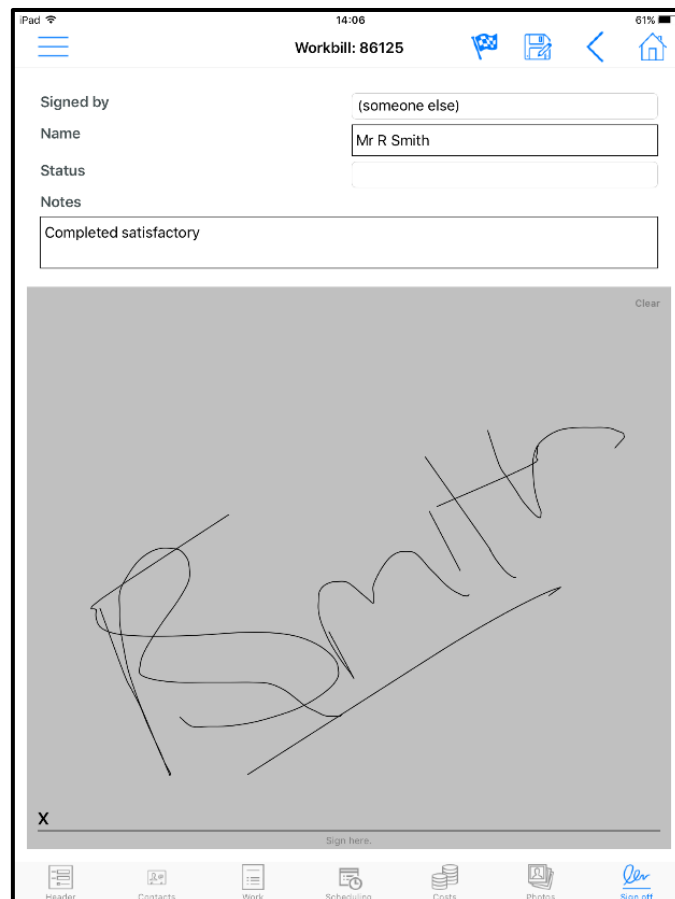
The **Workbill** option allows users to see existing **workbills** for their sites. In addition to this the user can also raise quotes whilst on site with the client for any additional work that may need to be carried out. Approval of quotes via workflow can be setup from the main system if required.



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.



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



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.

Equipment audit: New

Equipment

Supplier

Category

Asset no

Purchased

Last PAT

Next PAT

Status

Properties


Images

Images

Equipment audit: New

Properties

Images



Service Requests

The **Service Request** option allows managers 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.

Service request: New

Reference

Type

SR group

Priority

Source

Subject

Origin

Site

Service request: New

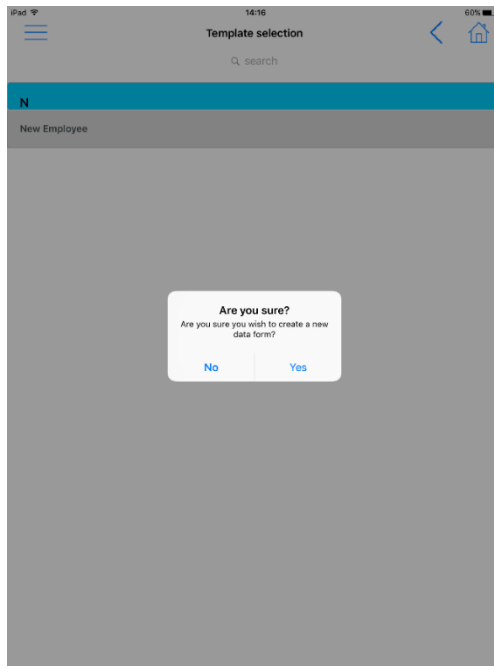
Note

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.

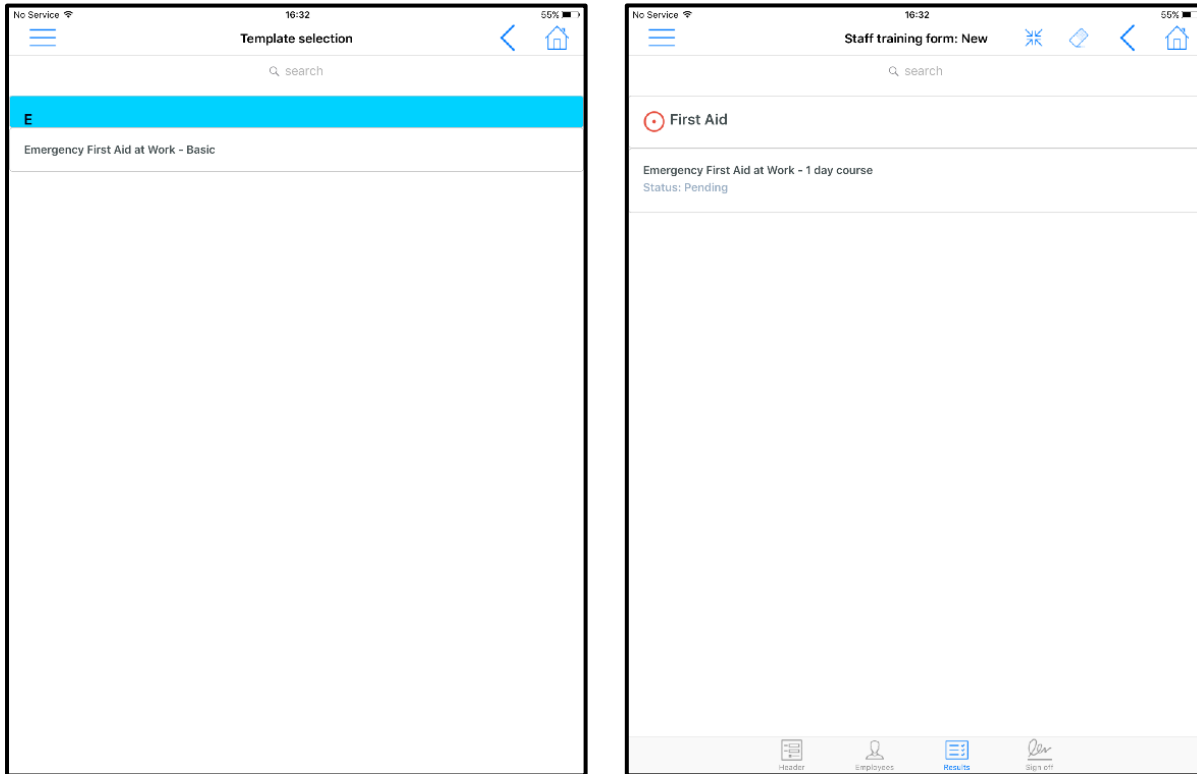


The user must complete mandatory elements on the form before he is able to mark the form as completed:

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.



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.

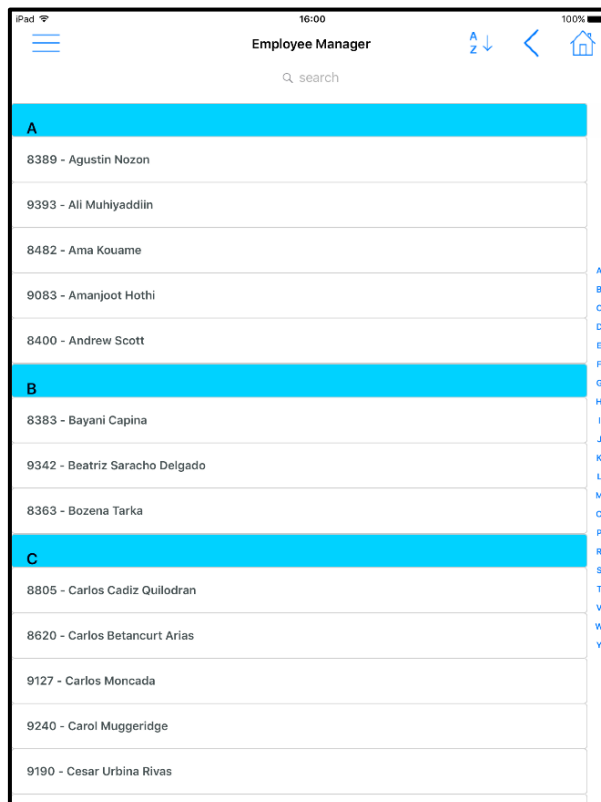
EMPLOYEE MANAGER

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

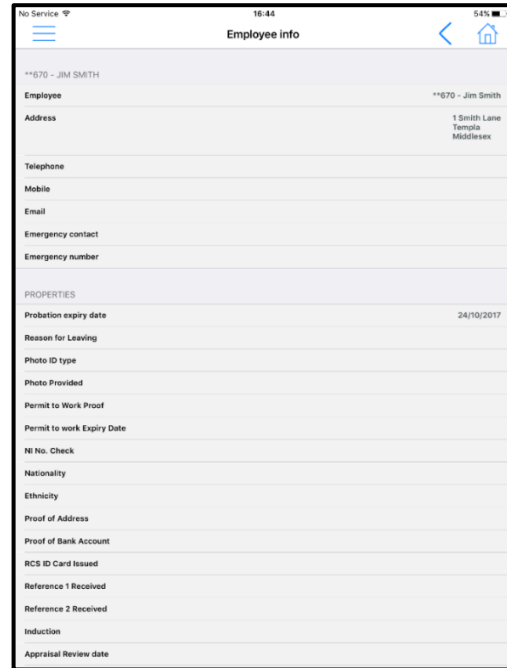
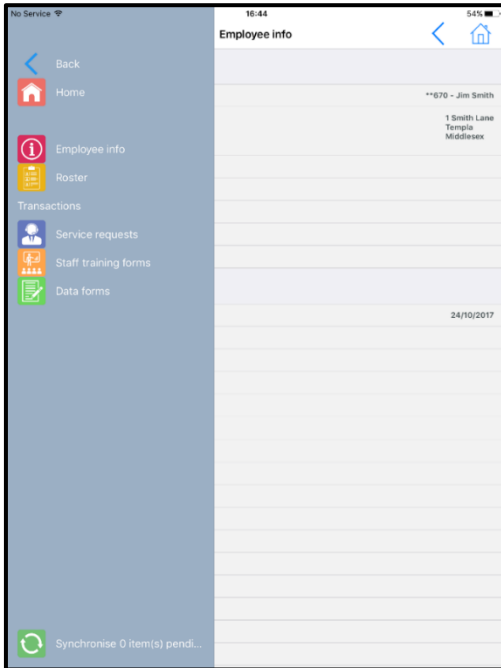
The **Employee Manager** will display a list of employees that are assigned to the user's sites (based on the contract assignments):



Employee Details

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

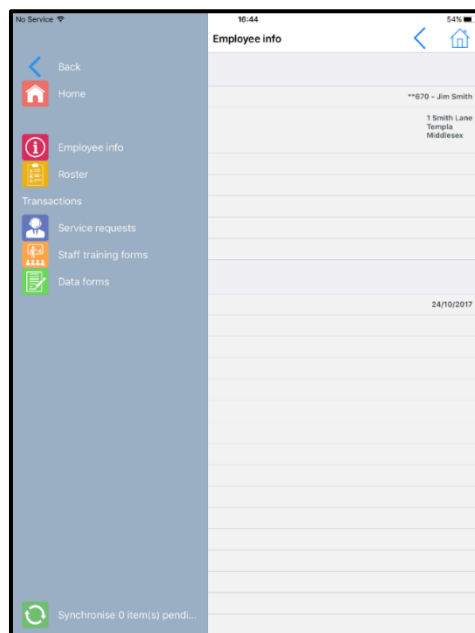
- Telephone/Mobile Number
- Email Address
- Emergency Contact and number
- Employee Photo



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





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.