

TemplaCMS

RIGHTCHECK INTEGRATION

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COMMERCIAL STATEMENT

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INTRODUCTION

Background

These training session notes are designed to provide background information and useful hands-on experience of using the general CMS function. These notes are designed to complement the training and assist you at a later stage when away from the training environment.

Overview

The Rightcheck module allows TemplaCMS to communicate with a 3rd party Rightcheck user account. It does this by building on the existing Advanced Form (AF) functionality, meaning that the Advance Form module is required.

SYSTEM

License

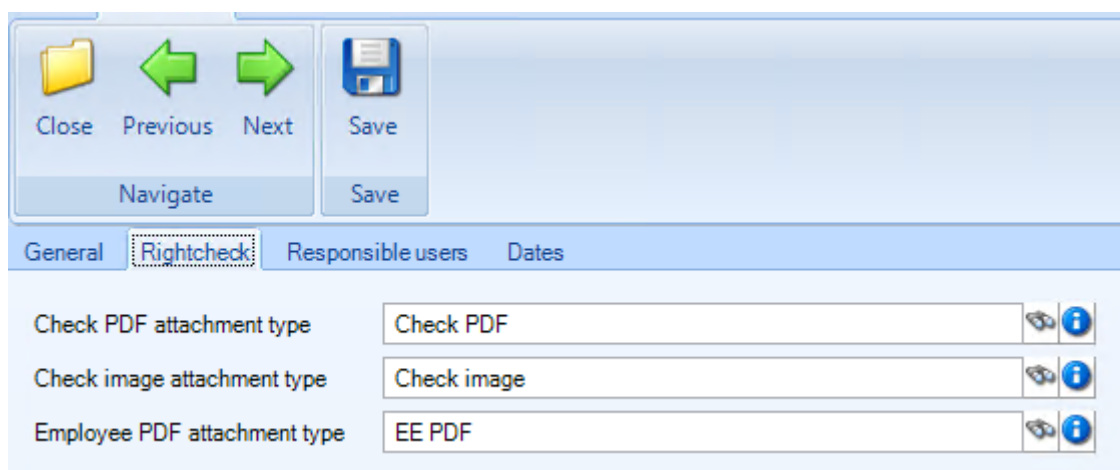
The Rightcheck (RC) module is separately licensed so a relevant license key must be obtained from TEAM Software and applied to TemplaCMS.

External System

All configuration on the 'General' tab will be set up by TEAM Software as part of the implementation process to allow communication with Rightcheck. This should not be altered once configured.

Additionally, three new Attachment types will be defined on the 'Rightcheck' tab:

1. Check PDF attachment type – used to save the check PDF document against the TemplaCMS check record.
2. Check image attachment type - used to save the employee photo against the TemplaCMS check record.
3. Employee PDF attachment type – used to save the check PDF document against the TemplaCMS employee record.



System Control

There are no specific settings on System Control for the Rightcheck module.

Functions and Function Groups

The Rightcheck module spans across three main areas of TemplaCMS:

1. Employees – for returned check details.
2. Maintenance – for Rightcheck Pools.
3. Data Forms - for set up and review.

Therefore, the following three function groups could be applied to a user depending on the level of authority required:

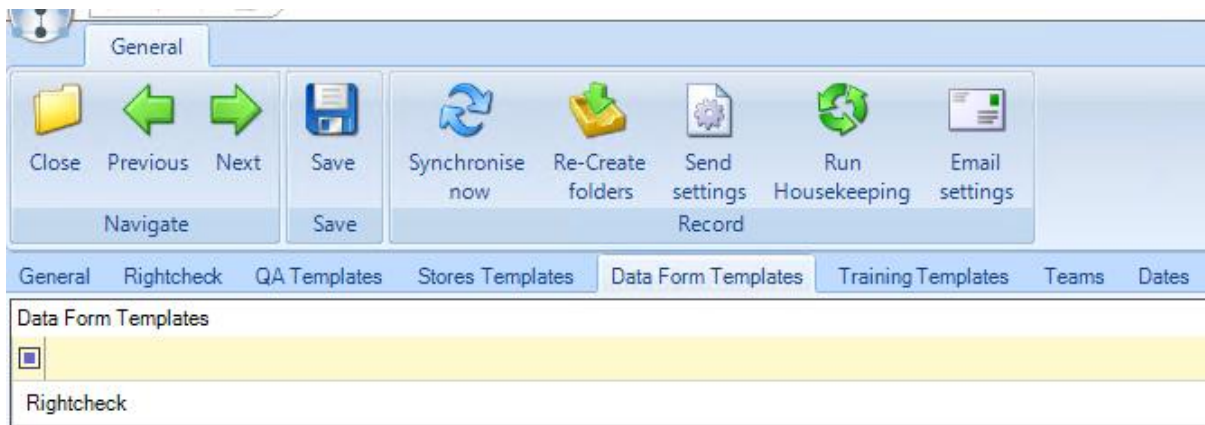
- ***EEVRTW** - * View employee right to work details.
- **RC** – Rightcheck.
- ***DATAFORM** - Data Form Functions.

It is up to the TemplaCMS administrator to add these (or other bespoke) **function groups** into their existing **function group structure** so that only the relevant users see the relevant QA options.

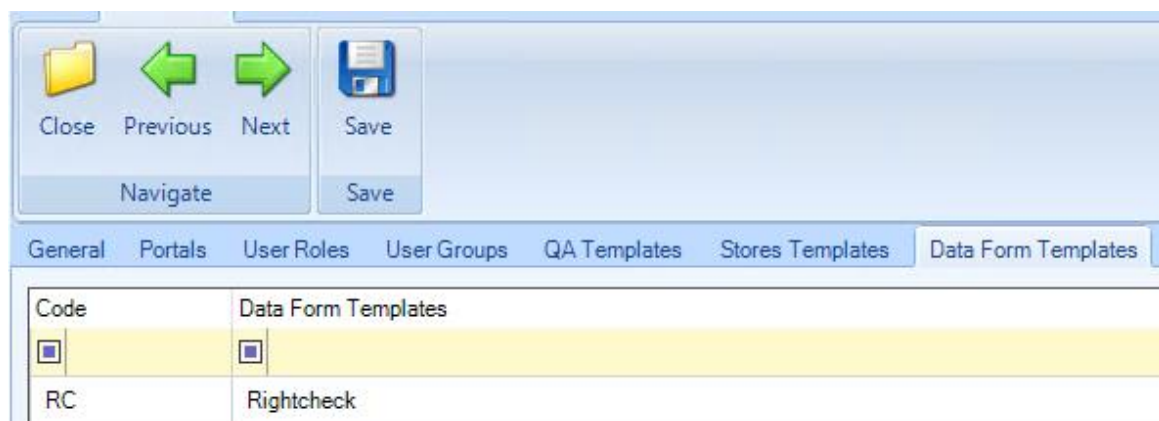
Users / Device Registration – Template Assignment

The Data form templates containing the Rightcheck control need to be assigned to required users, for them to be used – this can be done via User Maintenance or Device Registration or Data Form Templates (see below).

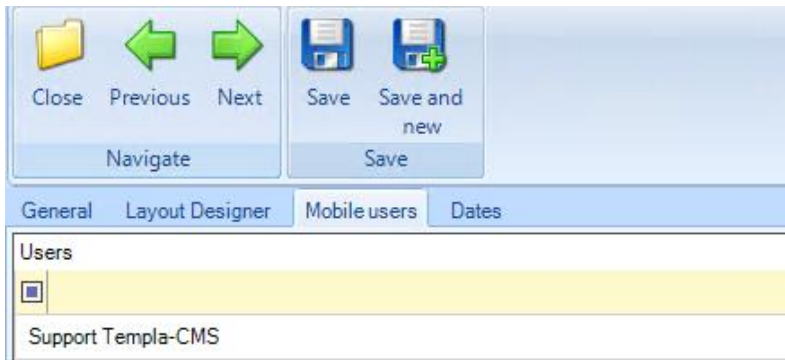
DEVICE REGISTRATION



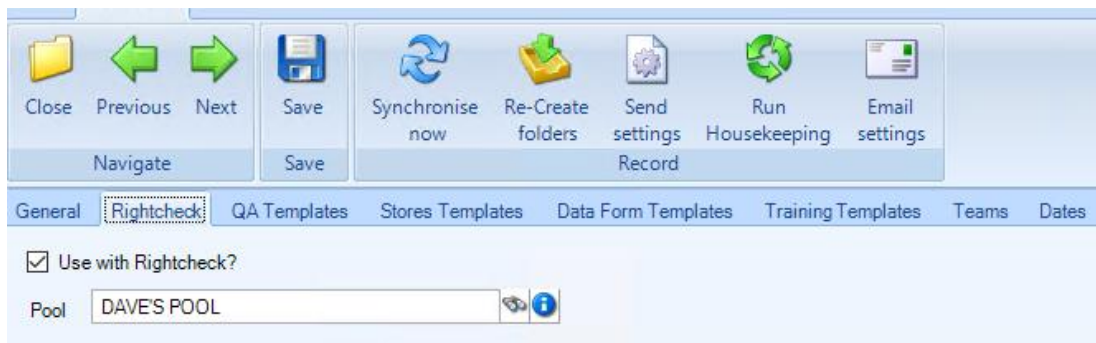
USER MAINTENANCE



DATA FORM TEMPLATES



Additionally, the 'Use Rightcheck' option needs to be enabled on the 'Rightcheck' tab of the Device Registration and a Rightcheck Pool defined for TemplaCMS to send the check to the require Rightcheck user for authorisation (see below):

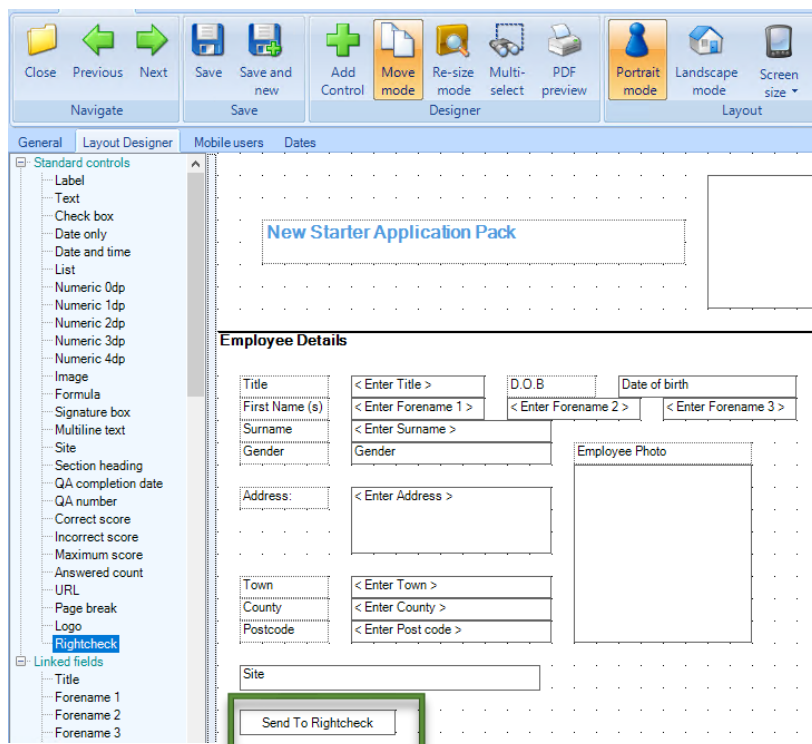


MAINTENANCE

For further details please see the Advanced Data Forms manual

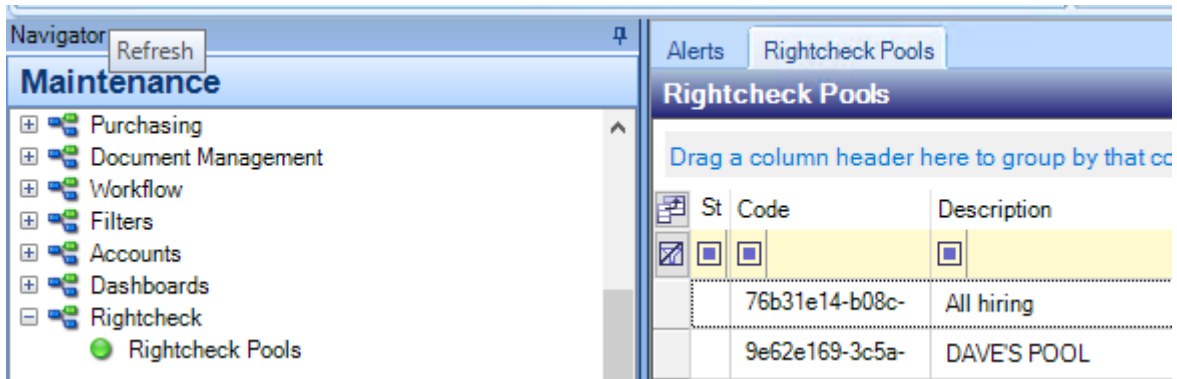
Data Form Templates

The Rightcheck control must be added to the required Data Form to send an employee to Rightcheck. This is only available on Data Form templates which have an 'Assignment area' of 'Employee'.



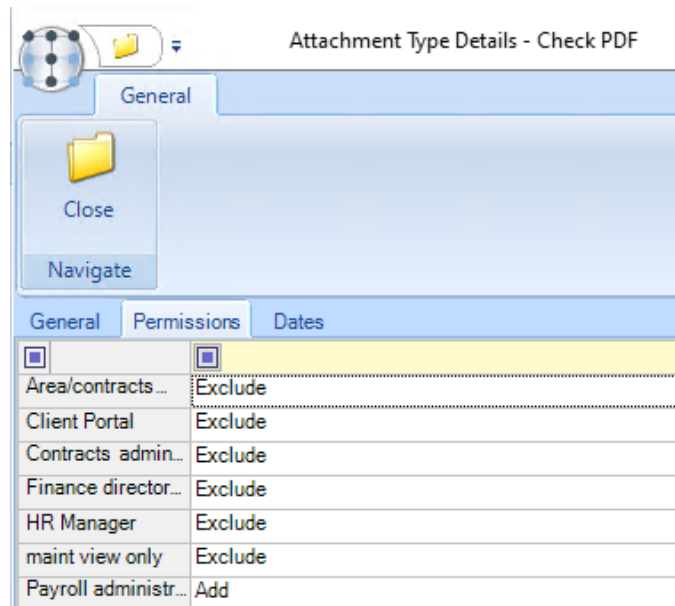
Rightcheck Pools

TemplaCMS has visibility of all Pools set up within Rightcheck. These can be viewed via **Maintenance > Rightcheck > Rightcheck Pools**. Please Note: These must be created/ maintained within the Rightcheck user interface, not TemplaCMS.



Attachment Types

It is the responsibility of the Templa-CMS administrator to set the required permissions on the three Attachment Types which are configured against the external system. For further information, please see the Attachment Types section of the Maintenance manual).



DATA FORMS

Data Forms containing the Rightcheck control can be reviewed and processed in the same way as all other employee assigned forms. For more information, please see the Advanced Data Forms manual.

RIGHT TO WORK CHECKS

Right to Work Check – List and Filter

The Right To Work Checklist allows the following specific filters to be used:

The screenshot shows a web-based filter form for Right To Work Checks. The form is titled "Check" and includes a toolbar with icons for Close, Save, Default criteria, Select filter, Publish, and Select format. The filter fields are:

- Employee: Text input field
- Check status: Dropdown menu (all)
- Matched?: Radio buttons for No, Yes, and Ignore (Ignore is selected)
- Check Id: Text input field
- Candidate Id: Text input field
- Candidate forename: Text input field
- Candidate surname: Text input field
- Candidate reference: Text input field
- Check review Id: Text input field
- Passport number: Text input field
- Passport expiry date range: Two date range dropdowns (not set) and a checkbox for "All dates are relative?"
- Date of birth range: Two date range dropdowns (not set)
- Matched date range: Two date range dropdowns (not set)

All completed checks from Rightcheck can be viewed in TemplaCMS via the **Payroll > Other > Right To Work Checks** menu

The screenshot shows a table view of Right To Work Checks in TemplaCMS. The table has the following columns: St, Employee, Check status, Matched?, Check Id, Candidate Id, Candidate forename, and Candidate surname. The table contains two rows of data:

St	Employee	Check status	Matched?	Check Id	Candidate Id	Candidate forename	Candidate surname
	0012 - Magaly Whiteside	Approved	<input checked="" type="checkbox"/>	b5de2045-67c2-4010-bd4e	25f3710b-a473-43e6-a633	Magaly	Whiteside
	0002 - Dung Beltrami	Approved	<input checked="" type="checkbox"/>	4c523686-5a10-4c2b-97aa	8ae8ba2a-5f0a-48e9-a586	Dung	Beltrami

Additionally, it is possible to 'drill down into any of the rows within this list to see additional information on the check:

The screenshot shows a web application window titled "Right To Work Check". The interface includes a top navigation bar with "Close", "Previous", and "Next" buttons, and an "Attachments" section with "Process sheets", "View image", "Print check", and "Record" options. The main content area is a form with the following fields:

Employee	Magaly Whiteside
Check status	Approved
Check Id	b5de2045-67c2-4010-bd4e-48021bb23137
Candidate Id	25f3710b-a473-43e6-a633-d8a1d6e14b19
Candidate forename	Magaly
Candidate surname	Whiteside
Candidate reference	31-132622787528698516
Date of birth	08/04/1921
Passport number	Ajdhaj
Passport expiry date	11/06/2022
Check review Id	1ea0d269-b6c3-4b3e-b9d0-90883d92b6f2
Reviewd at	08/04/2021 08:11:36
Review by first name	Admin
Review by last name	Templa
Review by username	templa.sandbox.admin@rightcheck.io

The 'Attachments' option on the check detail, will also have the attachments below defined on the external system. Users can select 'Examine' to view each file:

1. Check PDF attachment type.
2. Check image attachment type.

Drag a column header here to group by that column.

St	Owner details	Type	Subject	Grouping	Expiry date
	Right to work check - 16 - 16	Check image	EmployeeImage16-13262343204998	61	
	Right to work check - 16 - 16	Check PDF	CheckPDF16-132623432242977445	62	

EMPLOYEES - RIGHT TO WORK

When an 'Approved' check is returned to TemplaCMS, the 'Right to Work' tab on the employee is updated:

The screenshot shows the "Employee Detail - Dung Beltrami" form. The "Right to Work" tab is active, displaying the following information:

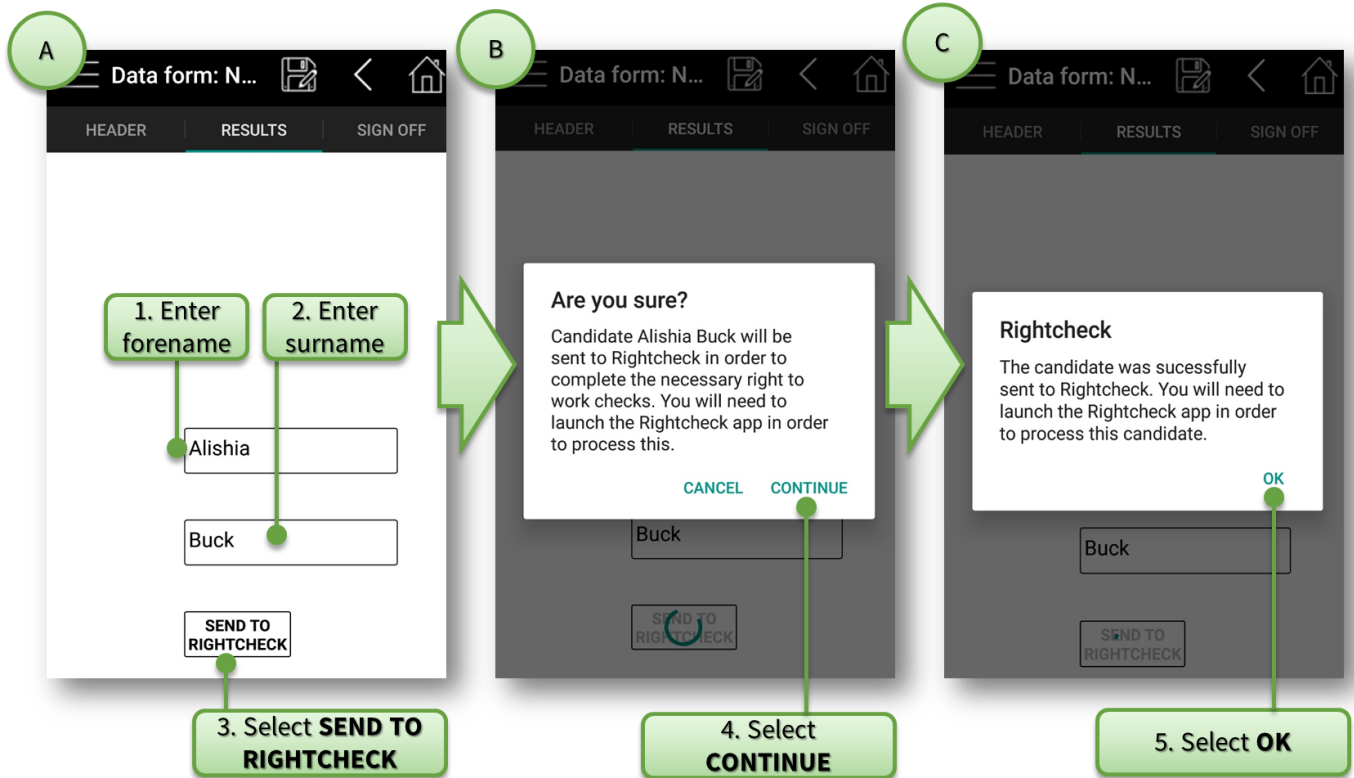
- Visa required?
- Visa reference: abcdefghu
- Issued date: 10/05/2021
- Expiry date: 20/05/2021
- Check status: Approved
- Candidate Id: 8ae8ba2a-5f0a-48e9-a586-c757546c5

RIGHTCHECK ON TEMPLA MOBILE APPLICATION V3

When completing a Data Form containing the Rightcheck control, users will be able to push the 'Send To Rightcheck' button on the Data Form. This sends the entered employee Forename and Surname to Rightcheck. The user is then prompted to log into the Rightcheck app. This is shown in the diagram below

Except for the above, the Data Forms can be created, completed, and synced in the same way as all other Data Forms. For more information, please see the Advanced Data Forms manual.

Please Note: The Rightcheck functionality is only compatible with Templa Mobile v3





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.