

# Team Portal Manual

## TEMPLACMS

Version: v.1 (CMS 6.1.0, September 2020)



# COMMERCIAL STATEMENT

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# INTRODUCTION

The TemplaCMS Team Portal system is a Two-part application consisting of both client (TemplaTPUI) and server (WebAPI) applications, these will be installed as a single website.

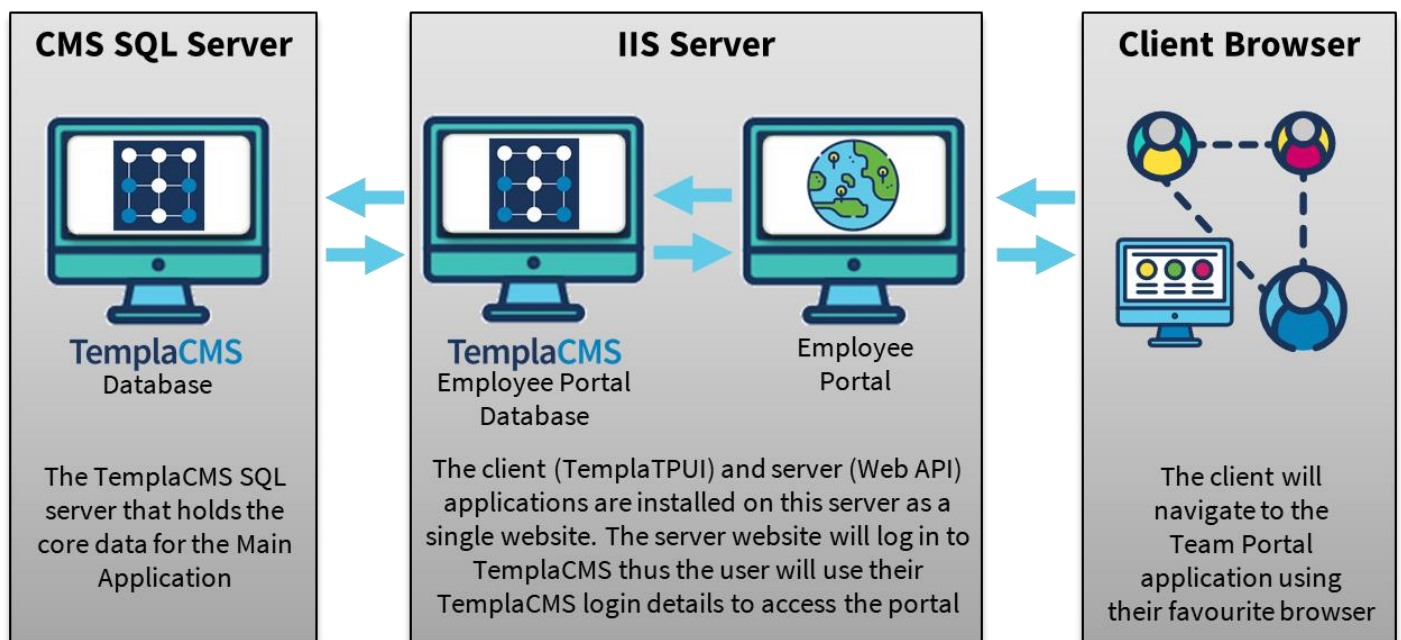
The client application is the front end of the system which the user will interact with using any web browser – however Internet Explorer is not supported, as this was replaced some time ago by Edge.

The server application communicates between the frontend client application and the TemplaCMS database.

The setting up of a secure connection (via HTTPS using a SSL certification) and port forwarding is the responsibility of the client’s IT department or their external IT support company.

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

# SCHEMATIC



# TECHNICAL REQUIREMENTS

## Server

The following items need to be installed on the server that is hosting the TemplaCMS Team 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 at least IIS version 7, however, version 6 is acceptable.

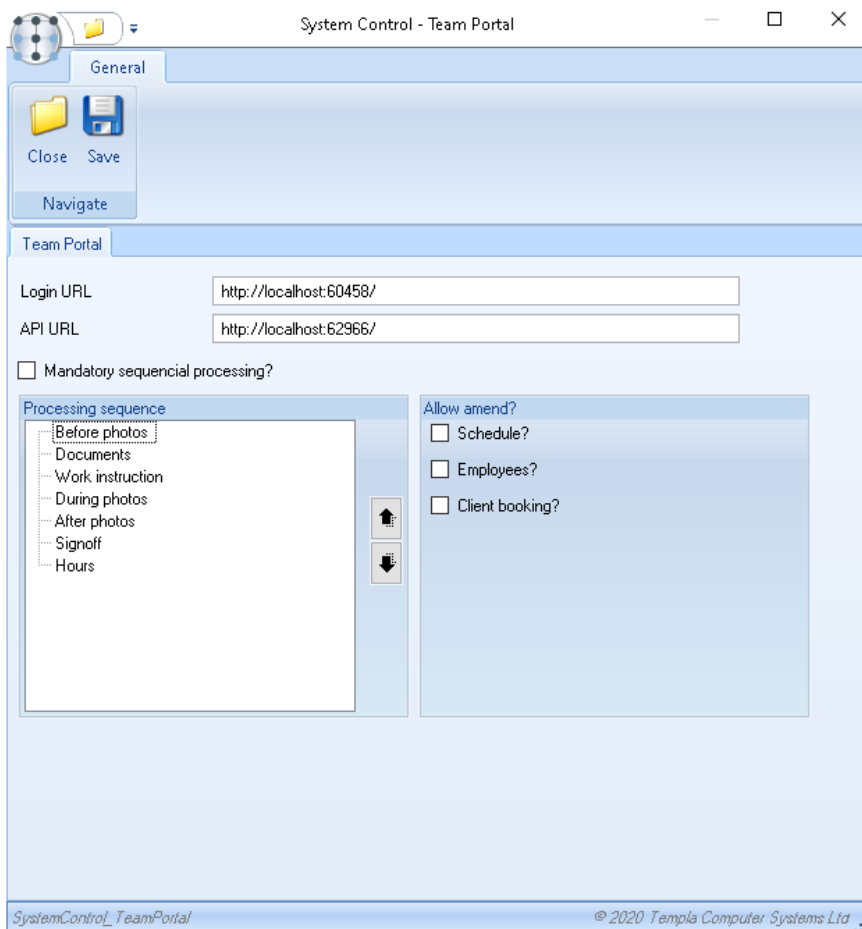
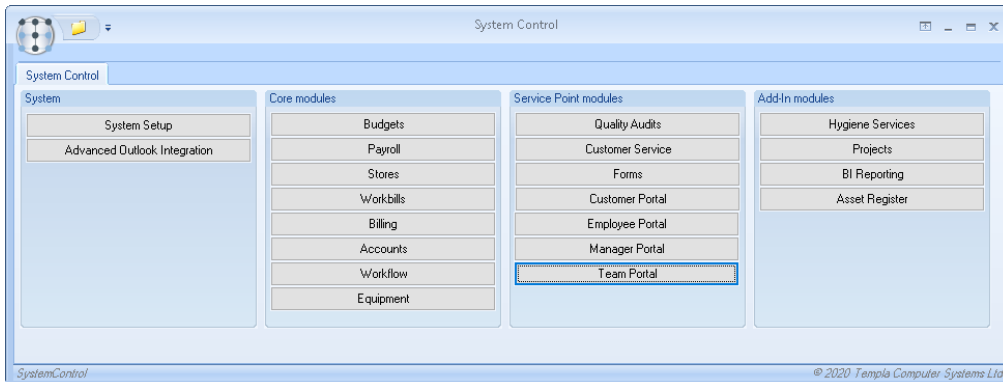
## Client

TemplaCMS Team Portal has been designed to be available across all major browsers; although still accessible, Internet Explorer was deprecated by Microsoft some time ago so Team Portal may not function correctly within IE. Team Portal is adaptive in design so can be used on mobile phone screens as well as tablets and PCs/Laptops. Whilst screens less than 5” will still work, Team Portal will work best above this size.

# TEMPLA-CMS CONFIGURATION

## System Control – Team Portal

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



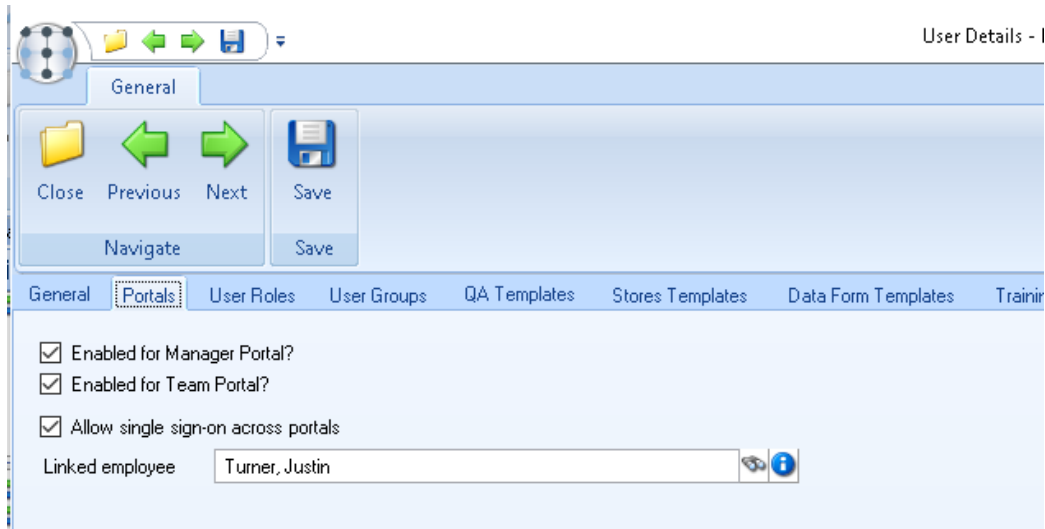
**Login URL:** the login URL defines the address for TP but will be passed to both Employee Portal (**EP**) and Manager Portal (**MP**), to allow them to render a link between the portals.

**Mandatory sequential processing, and processing sequence:** The processing sequence of the sections of each workbill can be set using the up/down arrows. This then controls the sequence in which these sections are shown in TP. Furthermore, if required you can force the user to complete the sections in the defined sequence by ticking the 'mandatory' flag.

**Allow amend:** The checkboxes here define whether the TP user can amend schedule, employee assignment and client booking details via TP.

## Users

Users need to be specifically enabled in order to use TP:



**Enabled for Team Portal:** if selected the user will be able to log in and use the Team Portal.

**Allow single sign-on across portal:** this setting works in conjunction with the above-mentioned URLs to enable the TP user to move seamlessly between TP, MP and EP.

**Linked employee:** this option is to link the user and the employee records together.

## Functions

Team Portal utilises the Workbill functions for the user to be able to use the portal. No specific functions exist for TP.

# TEMPLA-CMS Windows Client changes

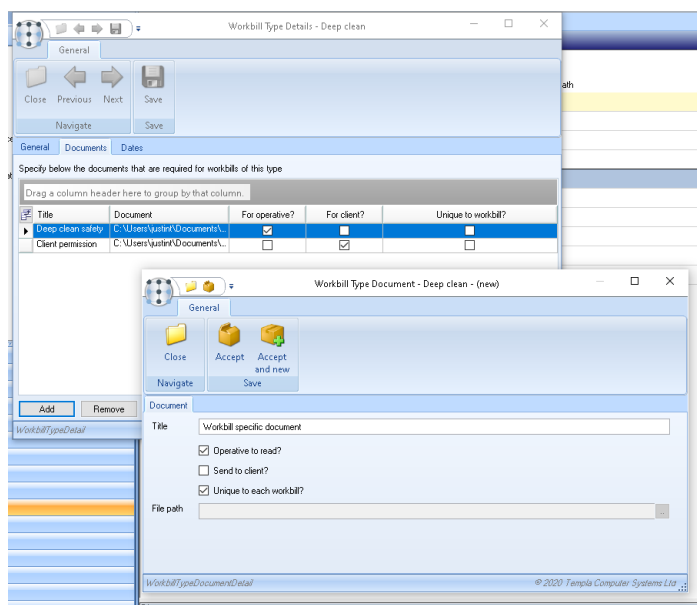
Several changes have been made to workbills within the TemplaCMS Windows Client application in order to support the required processes of Team Portal. The below described modifications are accessible in TemplaCMS regardless of whether TP is licensed or not.

## Workbill Documents

Most (if not all) workbills require that RAMS and COSHH documents be read and confirmed as such. TemplaCMS has now been extended to allow these documents to be created for every workbill and delivered to either the client, or the TP user.

### WORKBILL TYPES

Whilst these documents could vary between workbills, it is also likely that many workbills will require the same documents. As such the ability to define them on the 'workbill type' has been provided via a new toolbar button, which when pressed provides access to a list of documents:

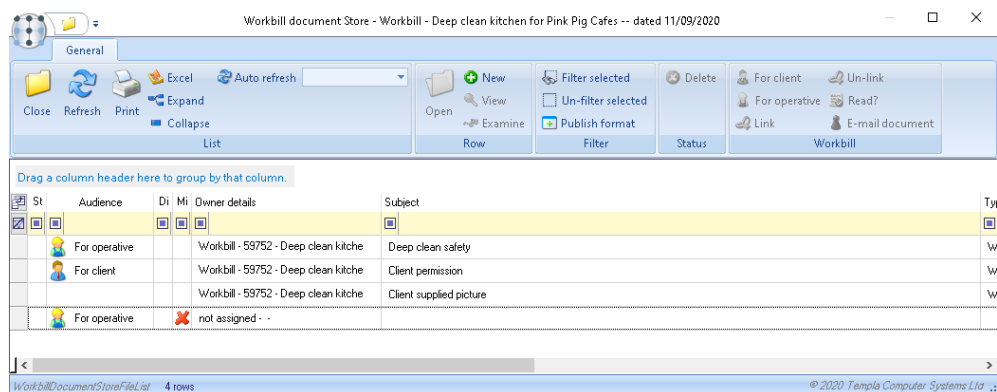


As can be seen, each document can be identified as for the operative or client.

For documents that are the same on all workbills of a given type, the file path should be specified. Alternatively, where a specific document is required that is unique to each workbill, this checkbox should be ticked. The use of this is described later.

### WORKBILL ATTACHMENTS

When a workbill is posted, the documents defined on the workbill type are automatically added as attachments, so are accessible via the existing toolbar button.



As can be seen above, the attachments list shows all manual attachments to the workbill along with those generated as documents.

Using the toolbar buttons (top right), the user can highlight any attachment and:

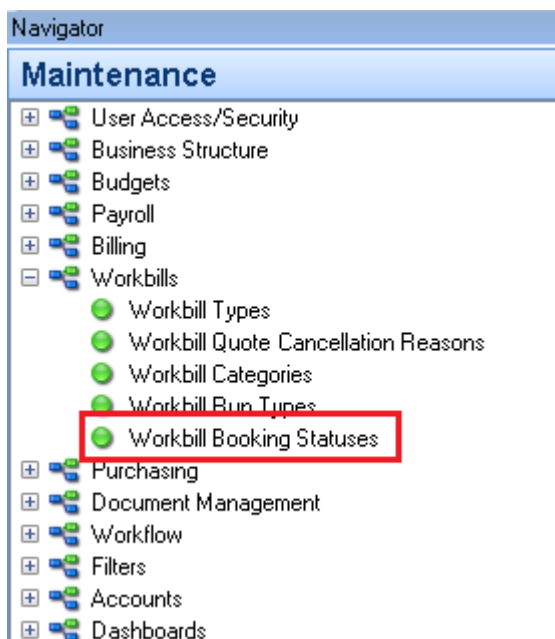
- Mark it as for the client or operative – in this way a photo sent by the client could be made visible to the operative on TP
- Link or un-link – this facility allows a ‘unique’ document requirement to be associated with the specific attachment added to the workbill
- Mark it as ‘read’ – though this is a process normally carried out via TP.
- Email it to the client

## Client Booking

A workbill will move through the various completion statuses (awaiting completion, completed, satisfied, etc.) in a controlled forward only manner. However, before work can commence, an agreed date for access may be negotiated.

TemplaCMS has been extended to allow for the optional free movement of a workbill through various user defined ‘workbill booking statuses’ to manage the client booking process.

### WORKBILL BOOKING STATUS



This process allows the definition of any number of workbill booking statuses. For example:

The screenshot shows a table titled 'Workbill Booking Statuses' with the following data:

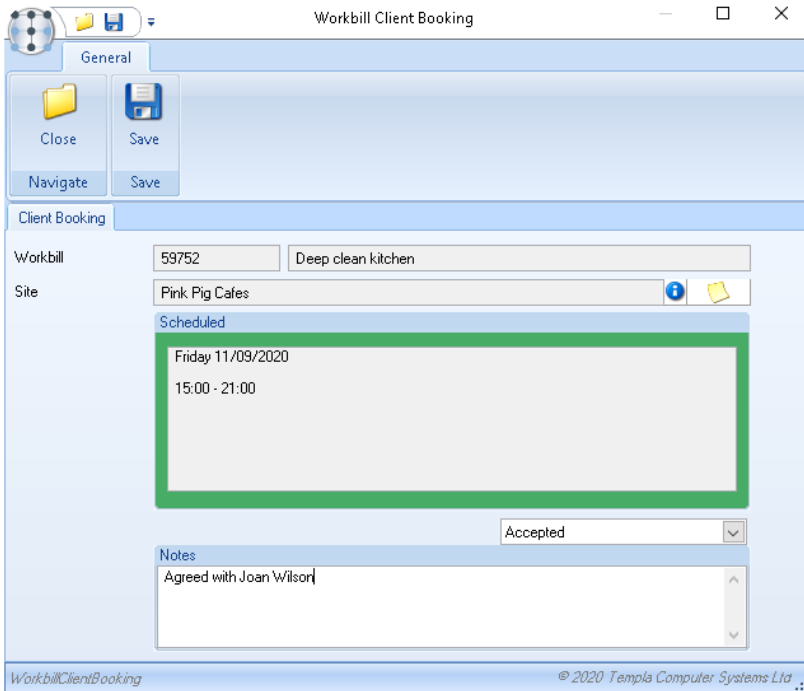
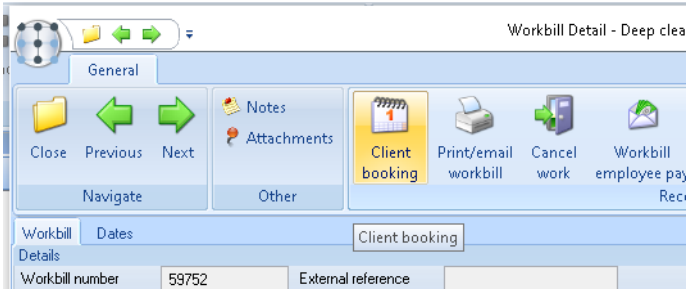
St	Code	Description	Default?	Full back colour
	1	not set	<input checked="" type="checkbox"/>	215, 80, 91
	2	Proposed	<input type="checkbox"/>	242, 121, 53
	3	Provisional	<input type="checkbox"/>	160, 204, 240
	4	Accepted	<input type="checkbox"/>	71, 172, 101

As can be seen in the above screenshot, 1 booking status can be defined as the default (starting status) for newly created workbills.

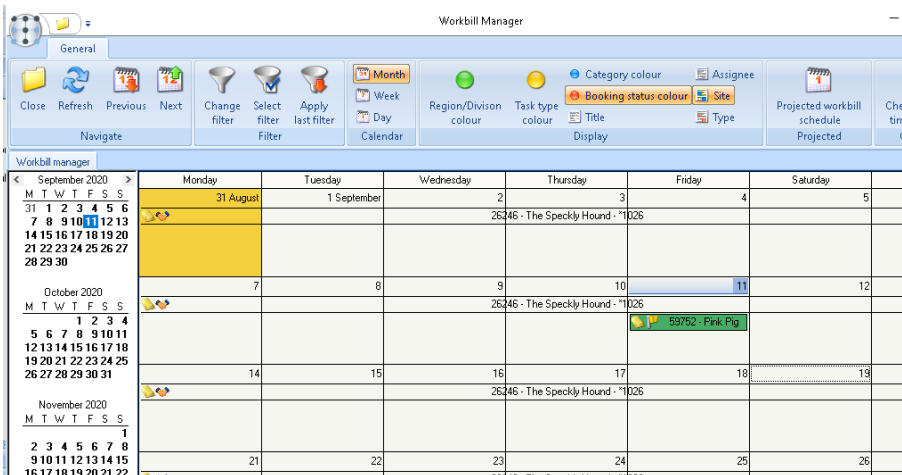
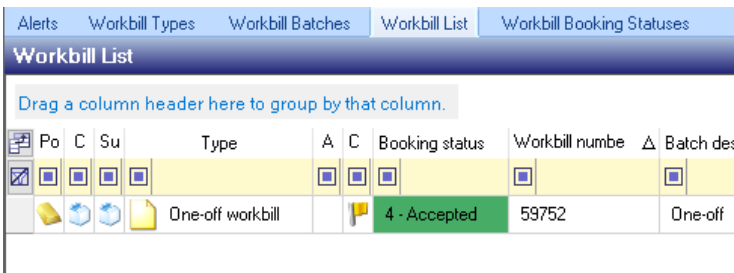


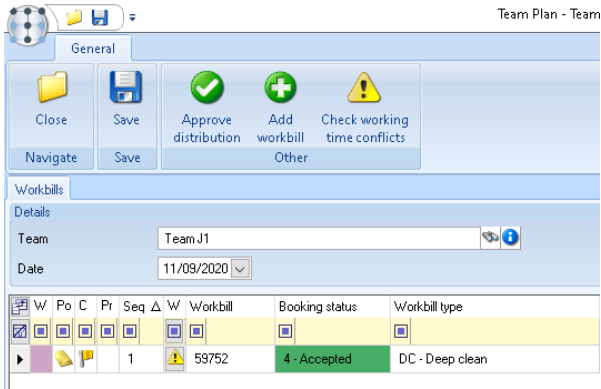
# WORKBILLS

From a workbill, the user can access the booking status via the toolbar:



From here the user can select one of the defined status and enter notes, with this being reflected on the main workbill list, workbill manager, and team manager, as well as on TP (see later):

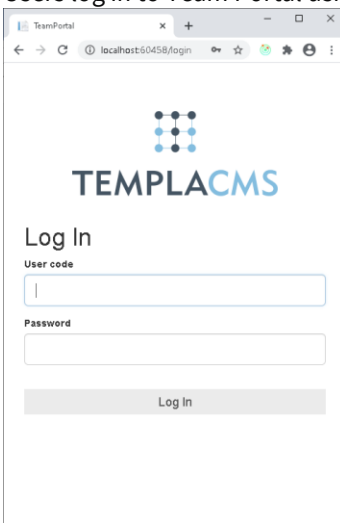




## TEAM PORTAL WEBSITE

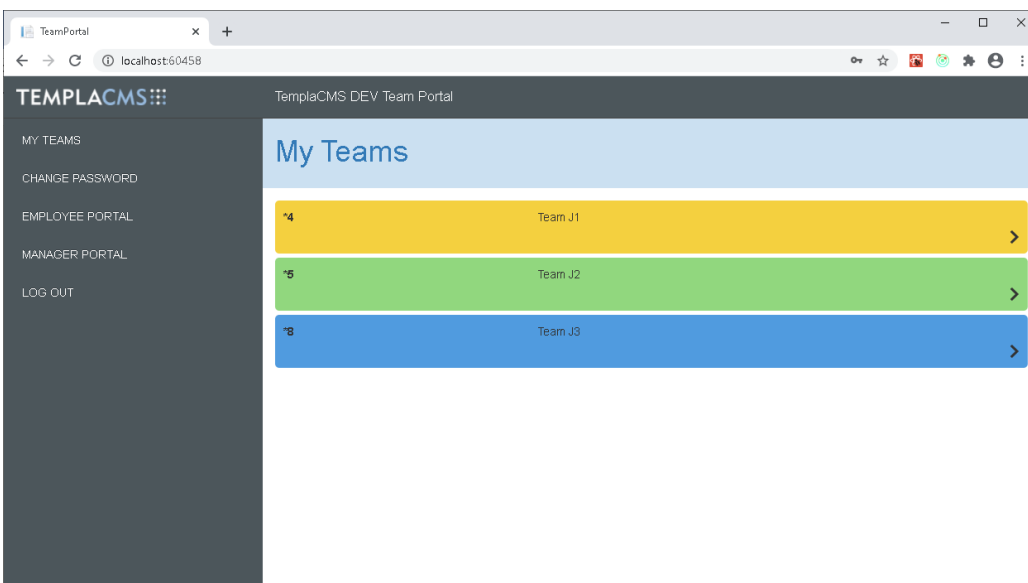
### Log in

Users log in to Team Portal using their TemplaCMS user and password:



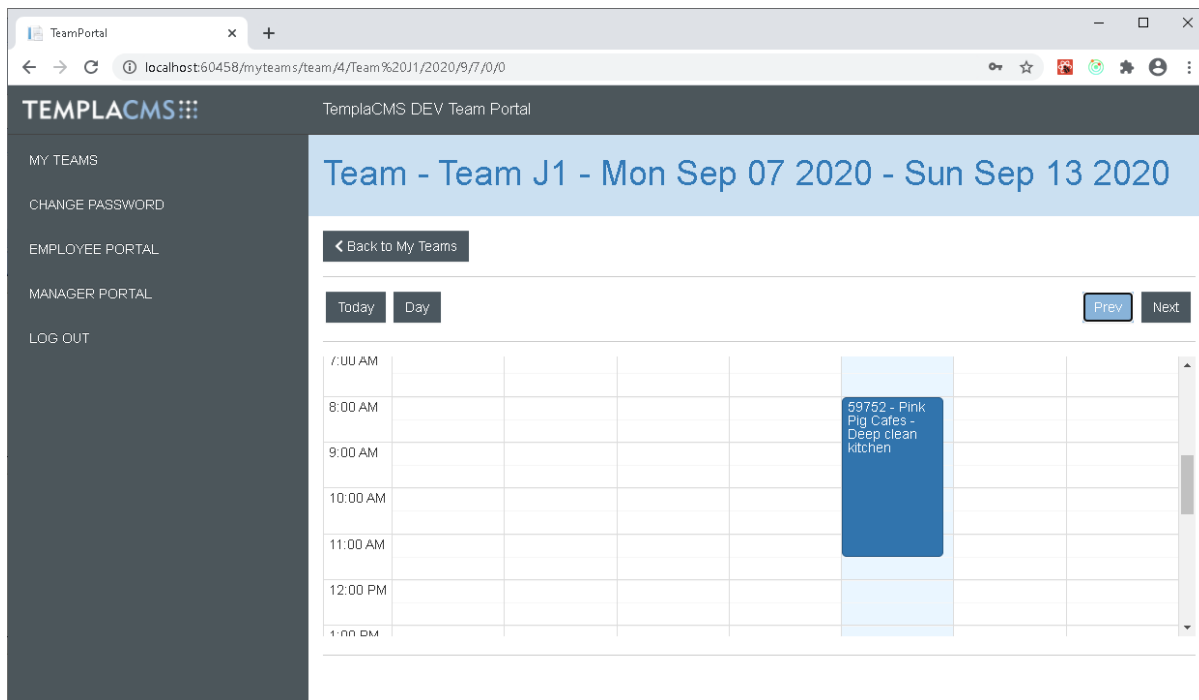
### MY TEAMS

On successful log-in, if the user has access to multiple teams (defined on the TemplaCMS user) they will be taken to the 'My Teams' list, where these are shown with their appropriate colour coding:



Tapping on a team will progress to the team calendar, whilst if the user only has access to a single team, My Teams will be bypassed, and they will progress directly to the calendar.

## TEAM CALENDAR



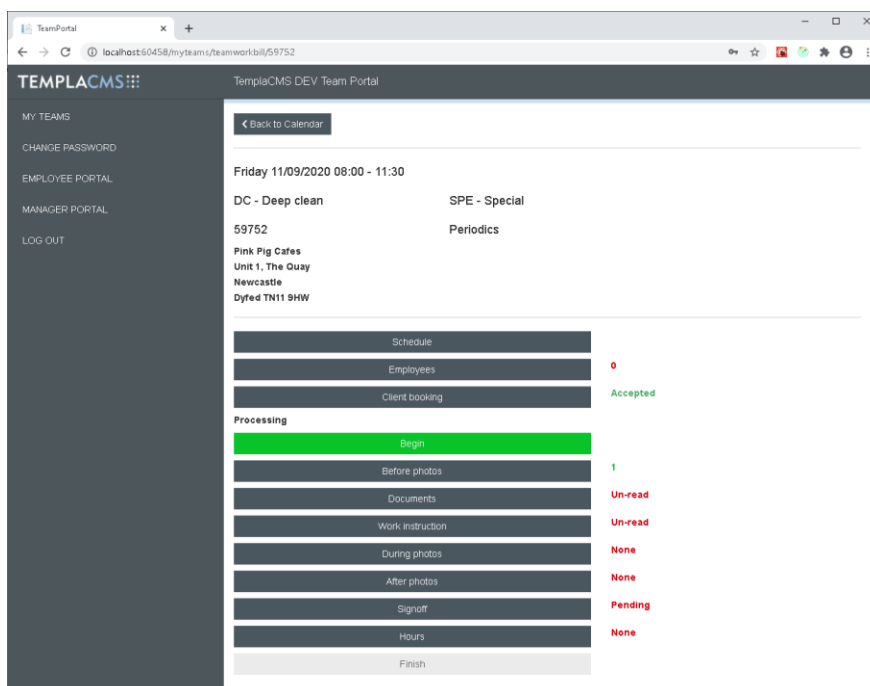
The Team Calendar will default to showing the current week of workbills plotted with their start and end times. Note that this will only include workbills that have been 'approved for distribution (via the TemplaCMS Team Manager process).

The user can switch between a week and single day modes, and navigate to previous or next week/day using the buttons at the top of the calendar.

Tapping on a workbill takes the user to the Workbill page.

## WORKBILL

The Workbill page presents the user with all the stages of a workbill so that they can be completed in the defined sequence (which may be mandatory – see System Control):



Tapping on any stage button will take the user to the appropriate view.

## Workbill – Schedule

TeamPortal  
localhost:60458/myteams/teamworkbill/59752

TEMPLACMS: Dev Team Portal

### Workbill 59752 -- Deep clean kitchen

Prev Next

Friday 11/09/2020 08:00 - 11:30

DC - Deep clean                      SPE - Special

59752                                      Periodics

Pink Pig Cafes  
Unit 1, The Quay  
Newcastle  
Dyfed TN11 9HW

Specific    AM    PM  
 Any time

Scheduled from: 11/09/2020 08:00  
Scheduled to: 11/09/2020 11:30

Cancel Save

The schedule view may be read-only based on the System Control 'allow amend' options (see earlier).

Using this view the user can change the date/time of the workbill in a similar manner to TemplaCMS.

## Workbill – Employees

TeamPortal  
localhost:60458/myteams/teamworkbill/59752

TEMPLACMS: Dev Team Portal

### Workbill 59752 -- Deep clean kitchen

Prev Next

Friday 11/09/2020 08:00 - 11:30

DC - Deep clean                      SPE - Special

59752                                      Periodics

Pink Pig Cafes  
Unit 1, The Quay  
Newcastle  
Dyfed TN11 9HW

777888                      Kelp, Charlie

200                                      Smith, Jorge

MEB ONZ

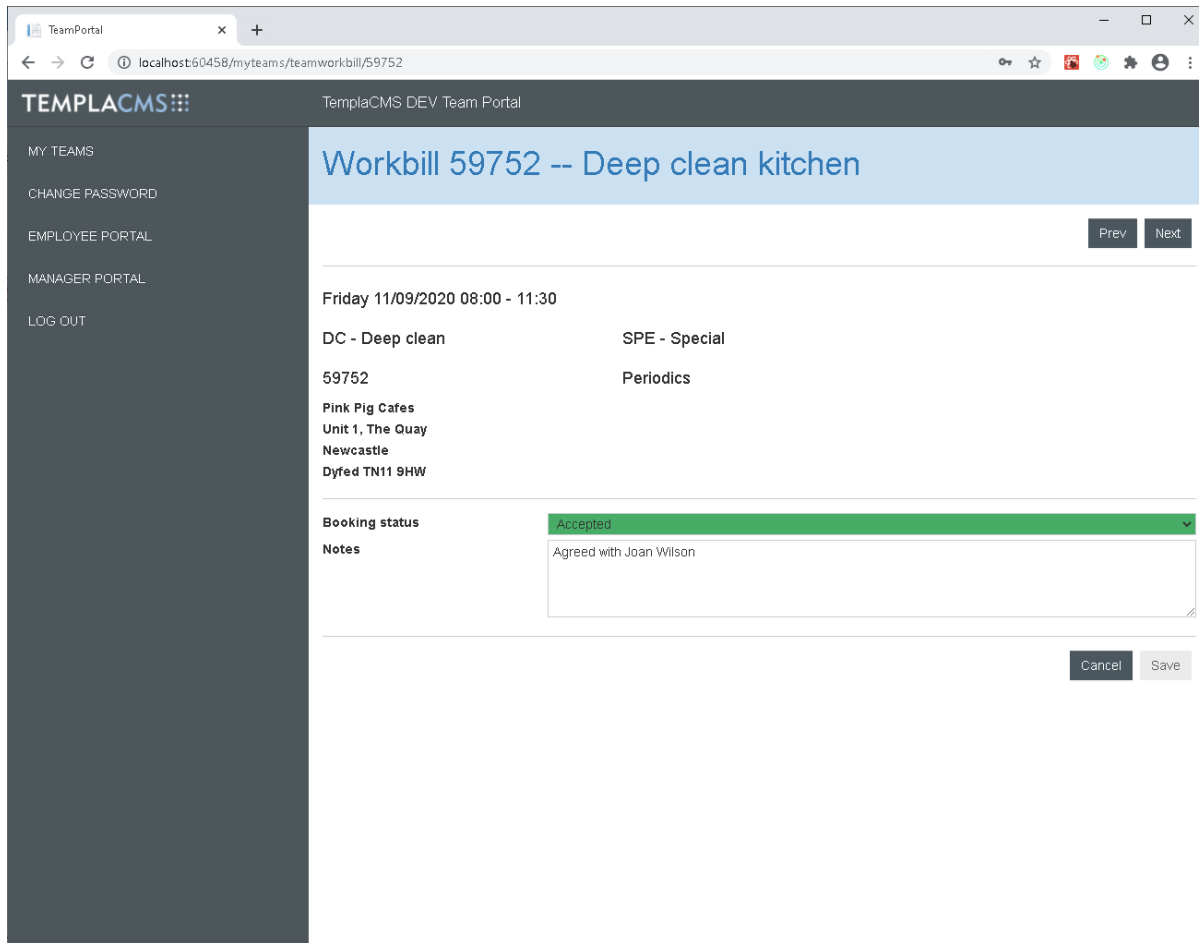
Add employee

Cancel Save

The employees' view may be read-only based on the System Control 'allow amend' options (see earlier).

The pre-selected employees for the workbill will be displayed, and the user may remove or add to this list as required. When adding employees, the defined team members will be presented at the top of the available employees' list.

## Workbill – Client Booking



The screenshot shows a web browser window displaying the 'TeamPortal' interface. The page title is 'Workbill 59752 -- Deep clean kitchen'. The left sidebar contains navigation links: 'MY TEAMS', 'CHANGE PASSWORD', 'EMPLOYEE PORTAL', 'MANAGER PORTAL', and 'LOG OUT'. The main content area displays the following information:

- Friday 11/09/2020 08:00 - 11:30
- DC - Deep clean
- SPE - Special
- 59752
- Periodics
- Pink Pig Cafes
- Unit 1, The Quay
- Newcastle
- Dyfed TN11 9HW

Below this information, there is a 'Booking status' dropdown menu set to 'Accepted' and a 'Notes' text area containing the text 'Agreed with Joan Wilson'. At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

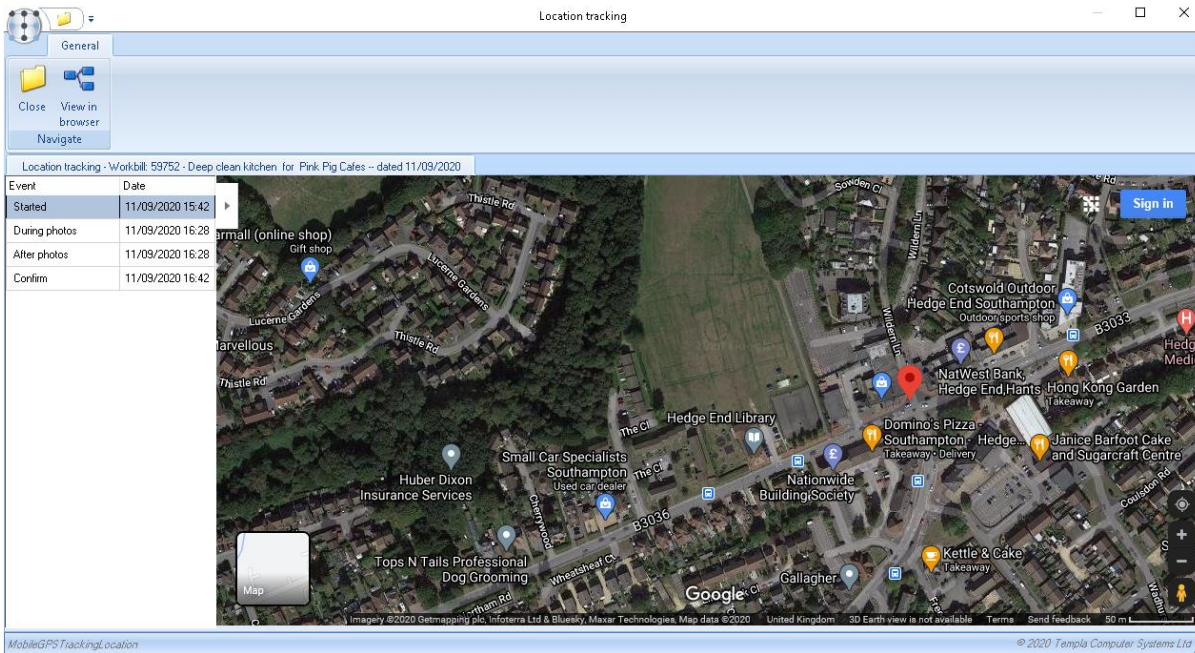
The client booking view may be read-only based on the System Control 'allow amend' options (see earlier).

Similar to TemplaCMS, this allows the workbill to be freely moved between defined workbill booking statuses.

## Workbill Processing – Begin

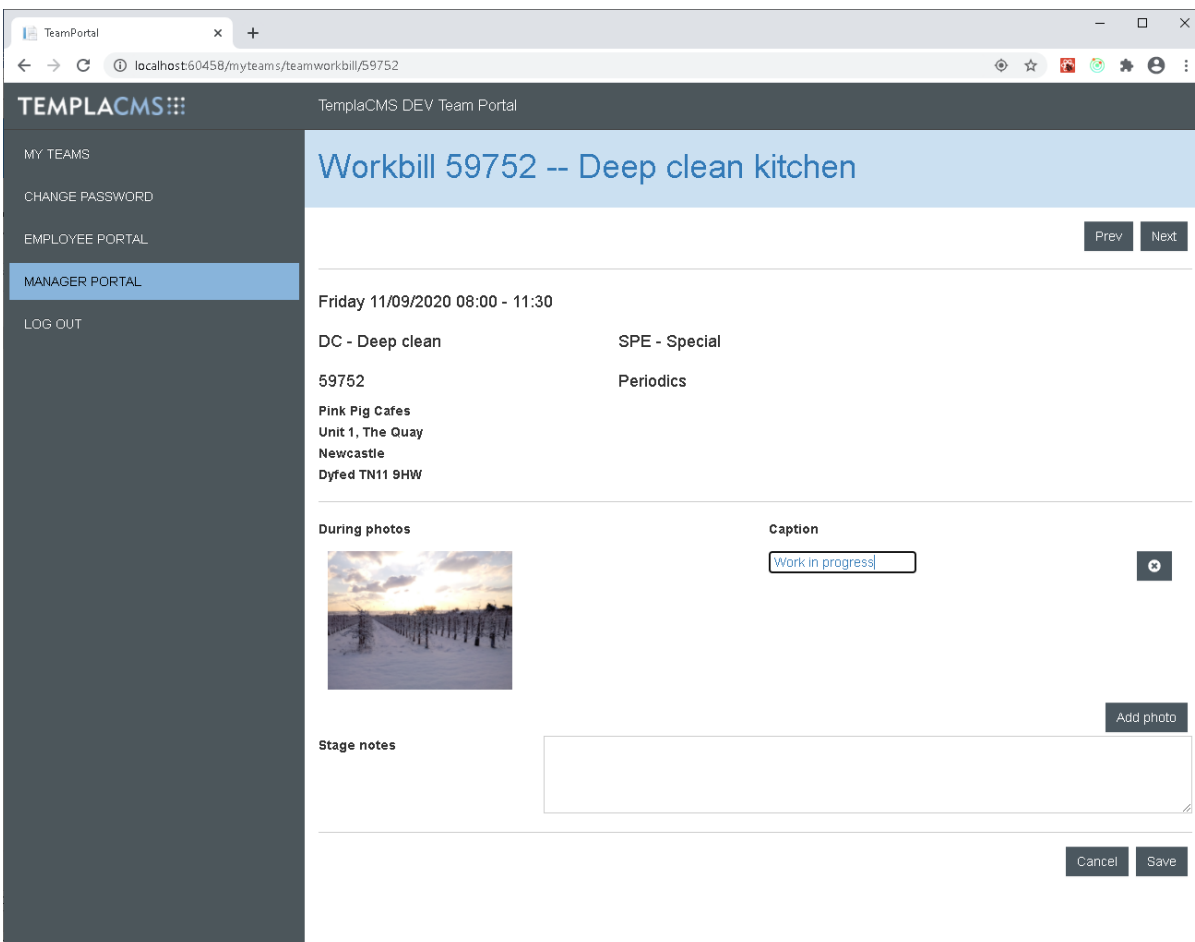
Until 'Begin' has been pressed, the following processing options are read-only. On pressing begin, the start time is recorded, as is the current GPS location of the user.

Note that the GPS location is only relevant when accessing TP via a mobile device that is capable of capturing it. The location tracking is accessible from the TemplaCMS Workbill record:



Having pressed 'begin' the other processing options are now available for update. Each must be completed (except for 'hours' – which are optional) before the user is allowed to press 'finish'.

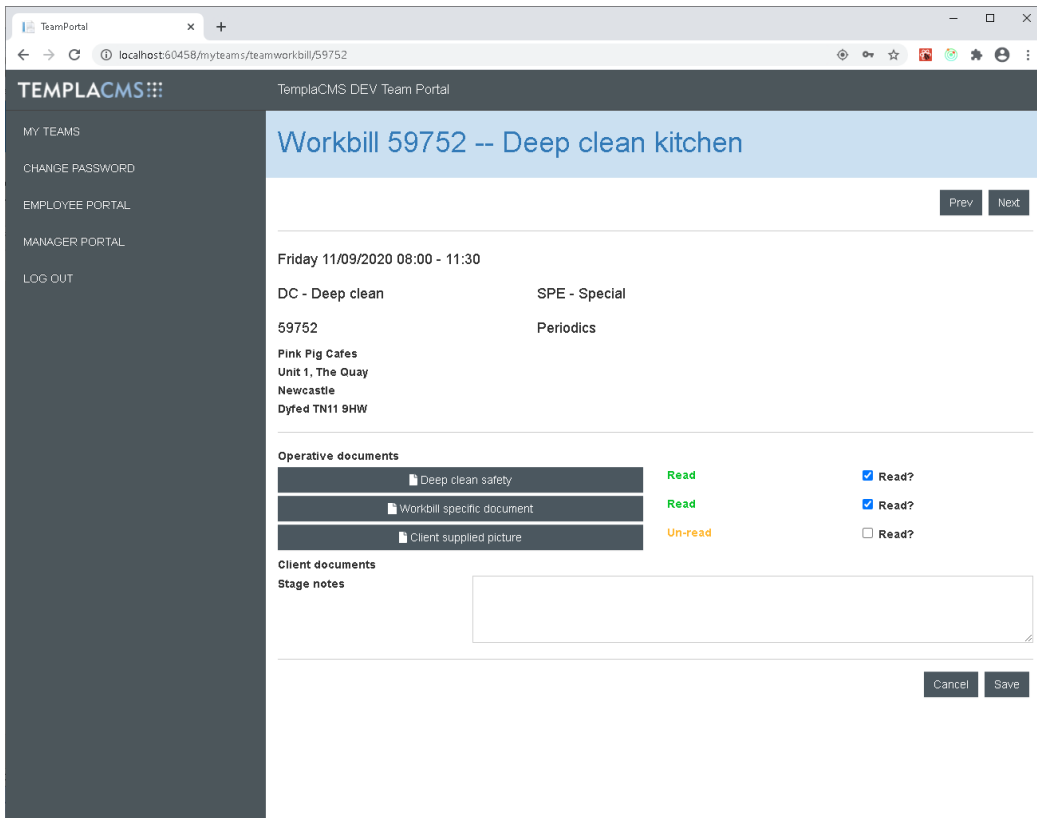
### Workbill Processing – Before, During and After Photos



Before, during and after photos each allow pictures to be taken (if on a mobile device with a camera) or selection of a pre-existing image, along with an optional caption.

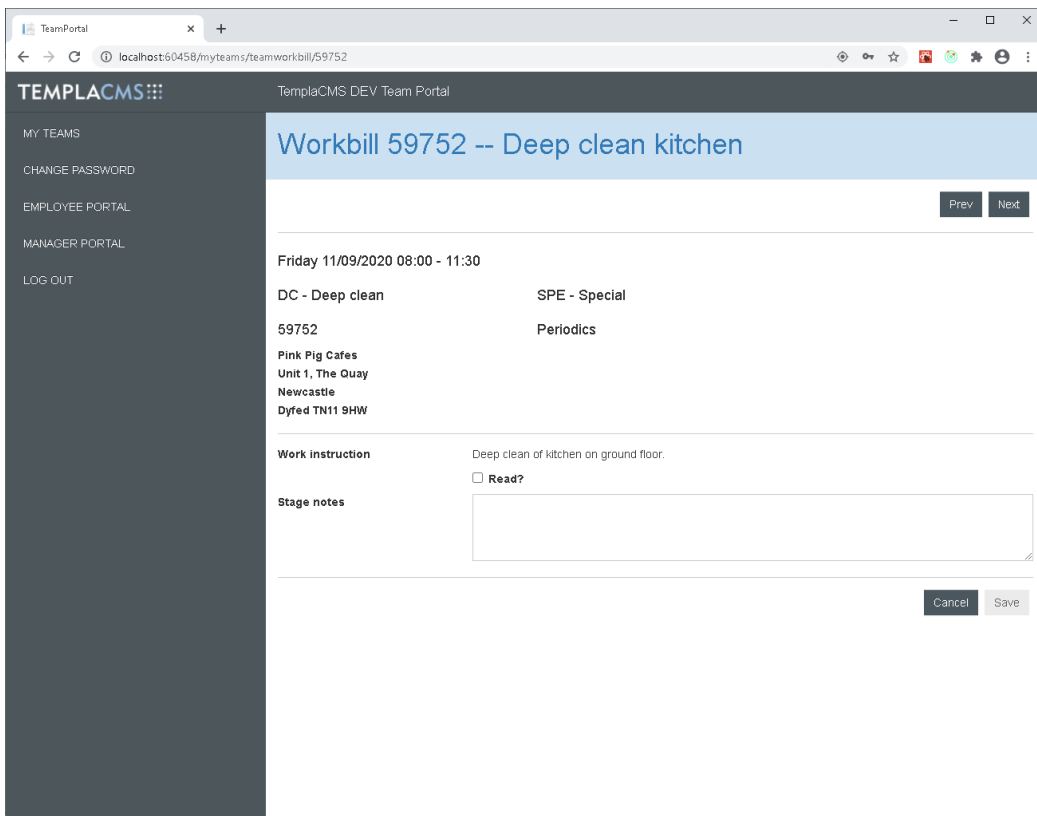
The GPS location is captured when photos are attached to the workbill.

## Workbill Processing – Documents



Each document can be accessed by tapping the button, which will download it to the browser for display in the appropriate app. Each document must be marked as read.

## Workbill Processing – Work Instruction



As with the documents, the user must confirm that the work instruction has been read.

## Workbill Processing – Signoff

The Signoff view allows the user to nominate the person who has signed along with capturing the signature.

Once signed-off, the user can now press the 'finish' button, though before doing so they may also enter employee hours and extra payment details.

## Workbill Processing – Hours

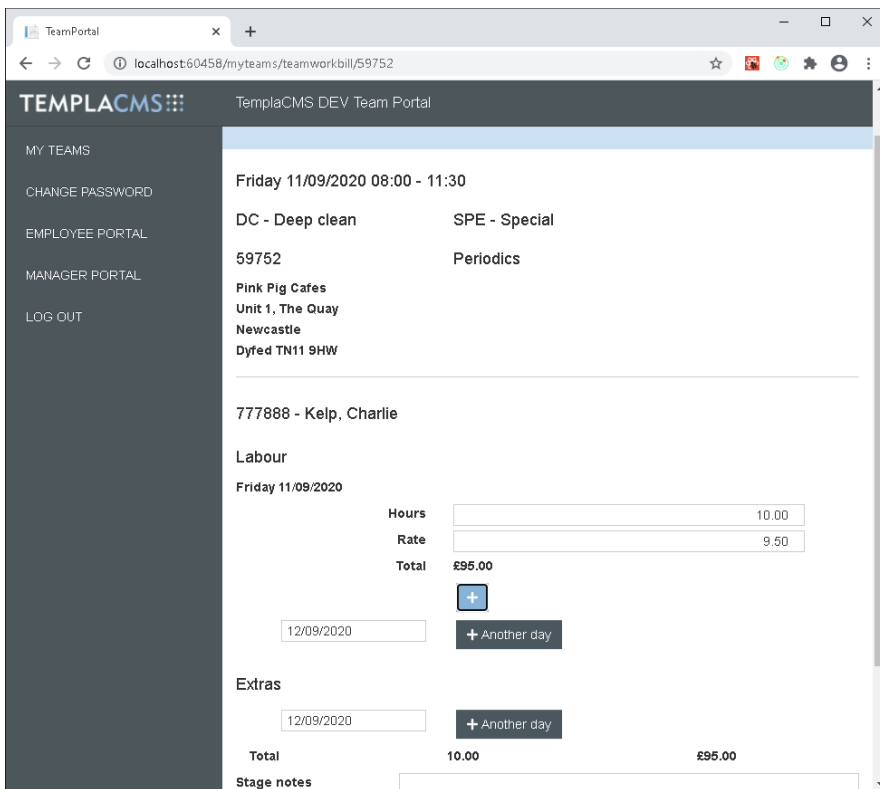
	Hours	Pay	Extras
8105 - Lamb, Lottie	0.00	£0.00	£0.00
200 - Smith, Jorge	0.00	£0.00	£0.00
777888 - Kelp, Charlie	0.00	£0.00	£0.00
<b>Totals</b>	<b>0.00</b>	<b>£0.00</b>	<b>£0.00</b>

	Hours	Cost
<b>Budgeted</b>	<b>10.00</b>	<b>£100.00</b>
<b>Actual</b>	<b>0.00</b>	<b>£0.00</b>
<b>Variance</b>	<b>10.00</b>	<b>£100.00</b>

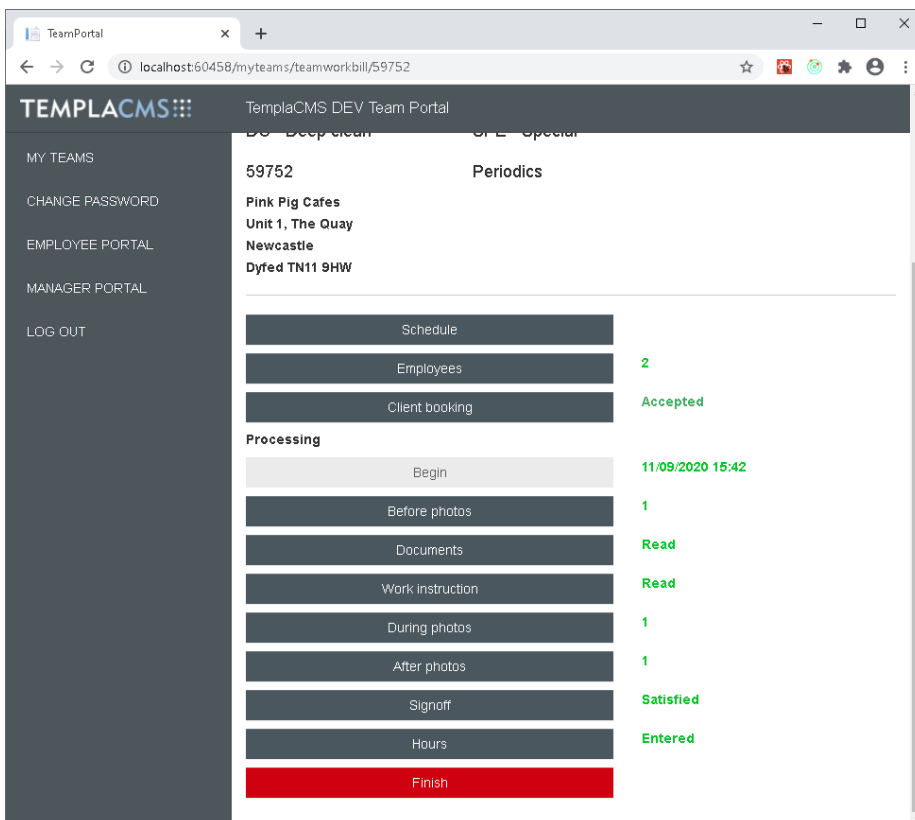


The Hours view shows the assigned employees with sum totals of their hours, pay and extras compared to the budgeted values on the workbill. Tapping on an employee takes the user to the detail view for entry:

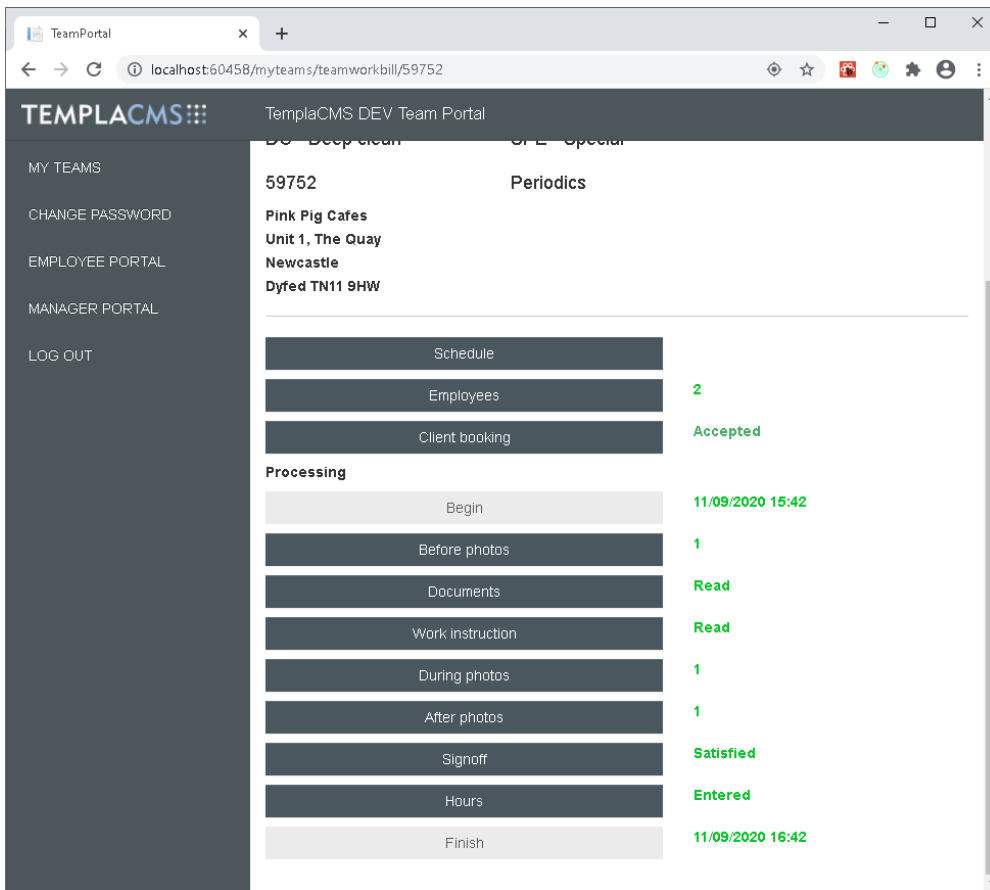


The detail view allows the hours, rates and extras to be entered per date, with the ability to add new dates beyond the scheduled range of the workbill if required.

### Workbill Processing – Finish



As above, once signed-off, the finish button is enabled. Tapping finish will capture the timestamp and GPS location, and mark the workbill as fully complete.



No further amendments to the workbill are then allowed via Team Portal



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