

Terms and conditions – User Guide

Terms and Conditions

Id

Description

File

Active

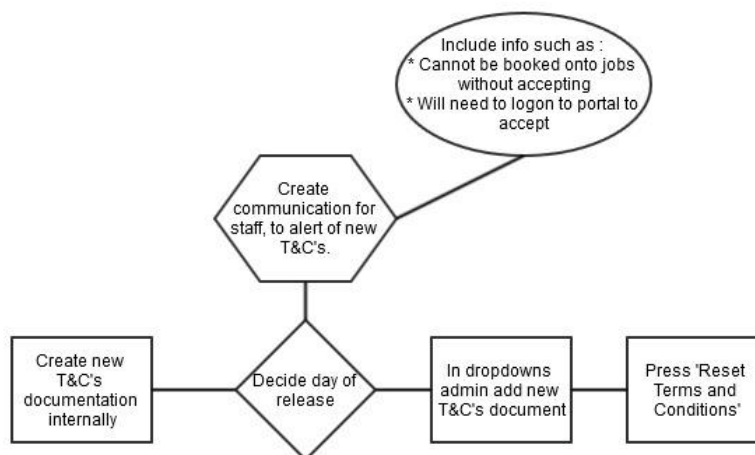
Current Terms and Conditions

Id	Description	File	Created Date	Active
1	Terms and conditions	www.terms_and_conditions_new.com	2-May-2014 14:05	No
2	Terms and Conditions May edition	www.example.com/knowledgebase/terms_conditions_document	8-May-2014 09:33	Yes
3	2014 Terms and Conditions	www.example.com/knowledge_terms_14	13-May-2014 11:06	No

1 Functional Objectives

The enhanced terms and conditions modifications allows you to control in one area the terms and conditions currently available to staff, to reset the current status of agreement (Accepted or not accepted T&C's) and to determine the T&C's upload date for effective monitoring. The T&C's mod works in a variety of areas, including Dropdowns admin and the reports area, so System Admin and View Reports right need to be enabled in order to utilise this function.

2 Workflow



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4 How Terms and Conditions work in the system

The terms and conditions work from a lookup on a contact in your system. If the terms and conditions value is Yes, they have accepted the Terms and Conditions and are allowed to be booked as normal. If the terms and conditions lookup value is set to no, various blocks may be in place including their name being red in the Staff search, them being unable to be booked on a shift, and them being unable to access the rest of their details in the portal until the Terms and Conditions have been accepted.

Accepted	Not Accepted
Additional Skills and Experience	Additional Skills and Experience
Age	Age
Agencies	Agencies
Agreed to Terms & Conditions Yes	Agreed to Terms & Conditions No
Airport Check	Airport Check
Alternative Working Area 1	Alternative Working Area 1

5 Drop downs area

The terms and conditions are uploaded and managed via an area within the dropdowns menu (Admin Menu > Dropdowns Admin) titled Terms and Conditions.

5.1 In order to upload a new T&C's

- 1 Add a description of the Terms and Conditions, this will be only viewed internally but will enable identifying the various documents, including within the report.

- 2 Add in the file name. This must be a file uploaded to the internet in some way, so should always be prefixed with (e.g) http:// or www.
- 3 Only tick **Active** when the document is ready to be made live. E.g, in the screenshot below although the document Id 3 is the most recent, it is currently not **active** so document Id. 2 will still be seen on the portal for those who have not accepted.

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3.1

- 4 Press the Save button

5.2 Reset all T&C's values

Once the staff members have been prepared for accepting the T&C's, and the decision has been made to go live:

1. Make the appropriate file active
2. Press Reset Terms and Conditions Status

All staff members Terms and Conditions lookup will now have been returned to 0, meaning that they must accept the terms and conditions in the portal in order to proceed.

5.3 Staff view once T&C's have been reset

Once the staff member logs into the portal, they will be prompted to change their password and to accept the Terms and Conditions. Changing the password is not mandatory, but complies with good security principles. The wording may be different depending on the staff portal, as this can be changed via Labels Admin (Please see 7 Terms and conditions labels)

Welcome

Please choose your new password for logging in to this staff portal.
If you want to keep your existing password then leave the following fields blank.

New Password

Confirm New Password

You must agree to current Health and Safety Policy and Terms & Conditions before you can proceed to the staff portal.

Please tick to confirm that you have read and agree to our [Terms & Conditions](#).

6 The Terms and Conditions Report

The Terms and Conditions report, found in the reports tab, enables you to keep a track of who has accepted the terms and conditions, which terms and conditions have been accepted and when.

Staff Terms and Conditions Report. Reload Report			
Agreed Date between <input type="text" value="01/05/2014"/> and <input type="text" value="19/05/2014"/>			
First Name	Last Name	Terms and conditions	Terms and Conditions May edition
Gemma	Abrahams	02/05/2014 14:22	
Jay	Askew	07/05/2014 16:03	
Mary	Lamb		08/05/2014 09:37
Maia	Eagling		16/05/2014 11:13
Michael	Naish		08/05/2014 10:40
Cara	Porter		08/05/2014 09:54
Angelika	Palm		08/05/2014 10:05

There is a filter on the report to display staff members who have agreed to terms and conditions between certain dates. Tip: If you are looking for all those who accepted a recent T&C and you know when it was uploaded; use that as the start date. They will not have accepted it before the document was uploaded.

The report then displays the staff members names; clicking on the first name opens an email with their email address automatically in-filled, their surname takes you to the staff details screen.

The columns are then determined by the T&C's that have previously been uploaded. Each time a new T&C is uploaded a new column will be created. The date in the relevant column indicates when a staff member accepted a set of T&C's. Having an accurate description in the Drop Downs area means that you are better able to tell in this report which T&C's have been accepted.

E.g:

Gemma Abrahams accepted 'Terms and Conditions' on the 02/05/2014 14:22, but has not yet accepted the 'Terms and Conditions May Edition'.

6.1 Lookup history

This information can also be found in another lookup on the staff contact profile, titled Terms and Conditions History. This lookup shows you the Terms and Conditions documents that the staff member has accepted in the past.

Terms and conditions History	Terms and conditions, Terms and conditions, Terms and conditions, Terms and conditions, Terms and conditions, Terms and Conditions May edition
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7 Terms and conditions labels

The labels for editing the Terms and Conditions text on the Staff Portal can be found the following way:

1. Admin Menu
2. Labels Admin

3. Dropdown menu > Staff Portal
 - a. Load
4. Find the label on the right hand side that you wish to change. To overwrite the text, add it into the left hand side and press save.

label3	You must agree to current Health and Safety Policy and Terms & Conditions	You must agree to our Terms & Conditions before you can proceed to the staff portal.
label4		Please tick to confirm that you have read and agree to our
label5		Terms & Conditions

8 Adding a document using the Knowledgebase

In order to follow these instructions you must first have the Knowledgebase installed (if you do not, please contact our sales team for further advice) and Knowledgebase Admin enabled in User Admin.

The Knowledgebase Admin manual will provide further detail, but the process is to:

- Upload a document to the specific class
- When the document is uploaded, press 'Test URL' which will then open the document in a webpage
- Use that URL in the Terms and Conditions (in dropdowns admin) file field and proceed as normal

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