

# Colleague

## Colleague Candidate & Contact Portals

Colleague 7 Recruitment CRM

Colleague Software

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### Colleague 7 Portals

Version 1.1  
Author David Payne

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## Colleague Portals

### Introduction

Colleague's standard offering enables you to embed a portal within your website and allow a Candidate and/or Contact to log into their Colleague profile to submit and approve timesheets.

### Candidate Portal

**Colleague<sup>7</sup> Mark Payne (Candidate: 9096)**

- Profile
- Placements
- Sign Out

|                   |                        |         |   |
|-------------------|------------------------|---------|---|
| Name              | Mark Payne             | Profile |   |
| Known As          | Test                   |         |   |
| Title             | Mr                     |         |   |
| Email             | mp@colleague.eu        |         |   |
| Secondary Email   | test1@test.com         |         |   |
| Home Number       | 01243334455            | Address | 20 The House<br>The Street<br>Watford<br>London<br>PO20 3RP |
| Mobile Number     | 0044(0)7777555555      |         |   |
| Work Number       | 01603 735930           |         |   |
| Current Employer  | Colleague Software Ltd |         |   |
| Current Manager   | William Minns          |         |   |
| Current Job Title | Java Developer         |         |   |

### Contact Portal

**Colleague<sup>7</sup> David Payne (Contact: 2186)**

- Profile
- Timesheets
- Sign Out

|                  |                                   |         |  |
|------------------|-----------------------------------|---------|--|
| Company          | Colleague Software Ltd            | Profile |  |
| Name             | David Payne                       |         |  |
| Known As         | David                             |         |  |
| Title            | Mr                                |         |  |
| Job Title        | Product Owner                     |         |  |
| Department       | Development                       | Address | 49<br>Silver Road<br>Norwich<br>Norfolk<br>NR3 4TD<br>United Kingdom |
| Email            | david.payne@colleague.eu          |         |  |
| Secondary Email  | david.payne@colleaguesoftware.com |         |  |
| Telephone Number | 01603111111                       |         |  |
| Mobile Number    | 07777 77777                       |         |  |
| Direct Number    | 01243629854                       |         |  |

# Colleague Portal Login

## Setting up the Portal

In the first instance, the Colleague Portals will need to be setup as an embedded web app within your website. To begin this process, please contact the support team: [support@colleaguesoftware.com](mailto:support@colleaguesoftware.com)

# Candidate Login Setup Permissions

## User Group Permissions

Within the Colleague Admin area, under User Group Permissions, the ability to create a 'Candidate Portal User' is enabled from within the 'Candidate' Permission Group:

|             |  |   |
|-------------|--|---|
| Candidate   | Candidate Edit Alert Text                    | Gives the option to edit the Alert Text on a Candidate record   |
| Company     | Candidate Alert Level All                    | Grants access to all Alert Levels on the Candidate record       |
| Contact     | Candidate Alert Level 1                      | Grants access to Alert Level 1 on the Candidate record          |
| Global      | Candidate Alert Level 2                      | Grants access to Alert Level 2 on the Candidate record          |
| Homepage    | Candidate Alert Level 3                      | Grants access to Alert Level 3 on the Candidate record          |
| Placement   | Candidate Alert Level 4                      | Grants access to Alert Level 4 on the Candidate record          |
| Requirement | Candidate Alert Level 5                      | Grants access to Alert Level 5 on the Candidate record          |
| Search      | Allow User to create a Candidate Portal User | Allows the user to create a login for a Candidate in the Portal |
| Super User  |  |   |
| View All    |  |   |

# Setup Candidate Portal Login

## Candidate Record

Within the Candidate record, a Candidate's Portal User can be created from the 'View More' menu > 'Create Portal User'.

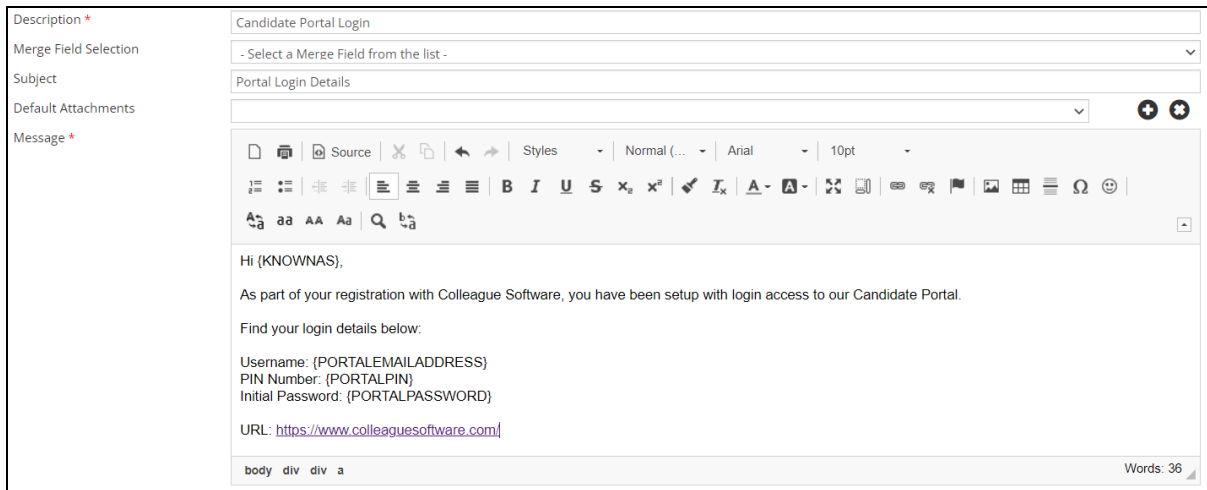
The Username of a Candidate's Portal User will be the Candidate's primary email address.

✓ Save
✗ Cancel

Portal User

Upon creating a Portal User, you will be advised of the username, unique PIN number and temporary password (for the Candidate's first login). On first login, the Candidate will be asked to set their own password for future access.

There are also merge fields available against the Candidate entity that can be used when sending the portal details to the Candidate via an email template.

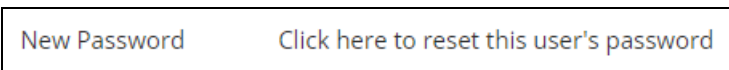


In the event of needing to reset a Candidate's Password, an administrator can access the Portal Users from within the Admin area under 'Users'.

Above the Users table you will find an option to include/exclude Portal Users.



Resetting a portal user password is the same as resetting a User's password.



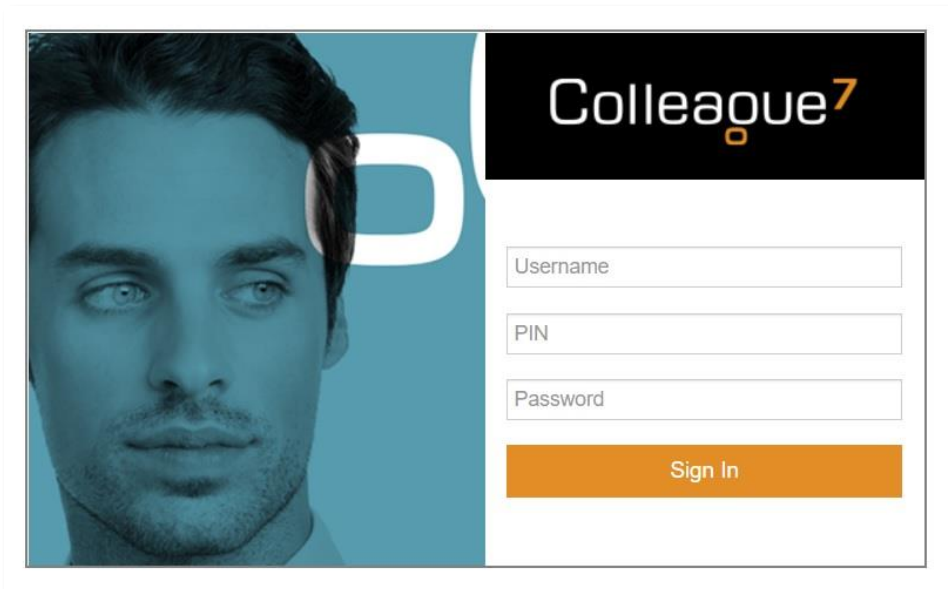
A Portal User can also be deactivated and re-activated from within the Candidate record, via the 'View More' menu under 'Portal Details'. This option will only appear if a Portal User has been created against the record.

|             |                               |
|-------------|-------------------------------|
| Deactivate  | Cancel                        |
| Portal User | henrydavies@colleaguedemo.com |
| PIN         | 559469                        |
| Active      | Yes                           |

## Candidate Portal

### Login Page

The portal login page can be embedded into your website and branded as required.



### Profile

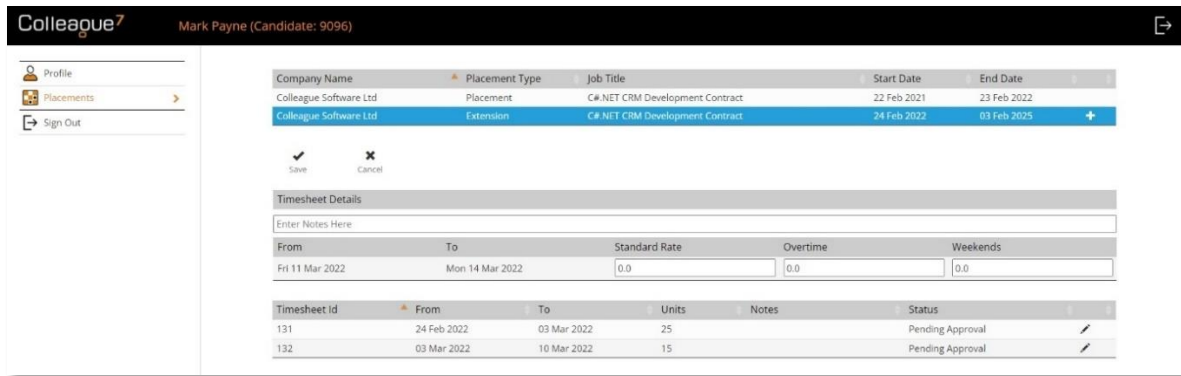
Upon successful login, the Candidate will access their profile page.

This will contain a list of standard fields showing the basic contact information and personal details you hold against the record.

### Placements

A Candidate will have the option to view all active Contract Placements against their record.

When a Placement is selected, the timesheets against that Placement will be listed and the candidate will have the option to press the plus sign to add a new Timesheet.



The Timesheet that is created will be as per the Timesheet Type (Weekly, Monthly, etc) and Period End Day as set against the Placement. Timesheets will be added against the Placement with the status 'Pending Approval'.

## Contact Login Setup Permissions

### Introduction

Within the Colleague Admin area under User Group Permissions, the ability to create a 'Contact Portal User' is enabled from within the 'Contact' Permission Group.

|             |  |   |             |
|-------------|--|---|-------------|
| Contact     | Contact Alert Level 1                      | Grants access to Alert Level 1 on the Contact record          | Full Access |
| Global      | Contact Alert Level 2                      | Grants access to Alert Level 2 on the Contact record          | Full Access |
| Homepage    | Contact Alert Level 3                      | Grants access to Alert Level 3 on the Contact record          | Full Access |
| Placement   | Contact Alert Level 4                      | Grants access to Alert Level 4 on the Contact record          | Full Access |
| Requirement | Contact Alert Level 5                      | Grants access to Alert Level 5 on the Contact record          | Full Access |
| Search      | Allow User to create a Contact Portal User | Allows the user to create a login for a Contact in the Portal | Full Access |
| Super User  |  |   |             |
| View All    |  |   |             |

## Setup Contact Portal Login

### Contact Record

Within the Contact record, a Contact's Portal User can be created from the 'View More' menu > 'Create Portal User'. The User ID of a Contact's Portal User will be their primary Email address.

✓ Save
✗ Cancel

Portal User

Upon creating a Portal User, you will be advised of the username, unique PIN number and temporary password (for the Contact's first login). On first login, the Contact will be asked to set their own password for future access.

There are also merge fields available against the Contact entity that can be used when sending the portal details to the Contact via an email template.

The screenshot shows an email template editor interface. On the left, there are fields for 'Description \*', 'Merge Field Selection', 'Subject', 'Default Attachments', and 'Message \*'. The main area contains a rich text editor with a toolbar and the following content:

Hi (KNOWNAS),

You have now been setup with login access to our Contact Portal.

Find your login details below:

Username: {PORTALEMAILADDRESS}  
 PIN Number: {PORTALPIN}  
 Initial Password: {PORTALPASSWORD}

Portal URL: <https://www.colleaguesoftware.com/>

Words: 30

In the event of needing to reset a Contact's Portal Password, an administrator can access the Portal Users from within the Admin area under 'Users'. Above the Users table you will find an option to include Portal Users.

The screenshot shows a dropdown menu titled 'Include Portal Users in the Users Table'. The menu is currently set to 'No'. The dropdown options are 'No' and 'Yes'. Below the dropdown, there are buttons for 'Admin' and 'Active'.

Resetting a portal user password is the same as resetting a User's password.

A Portal User can also be deactivated and re-activated from within the Contact record, via the 'View More' menu under 'Portal Details'. This option will only appear if a Portal User has been created against the record.

The screenshot shows a 'Deactivate' dialog box with a 'Cancel' button. The dialog contains the following information:

Portal User: henrydavies@colleaguedemo.com

PIN: 559469

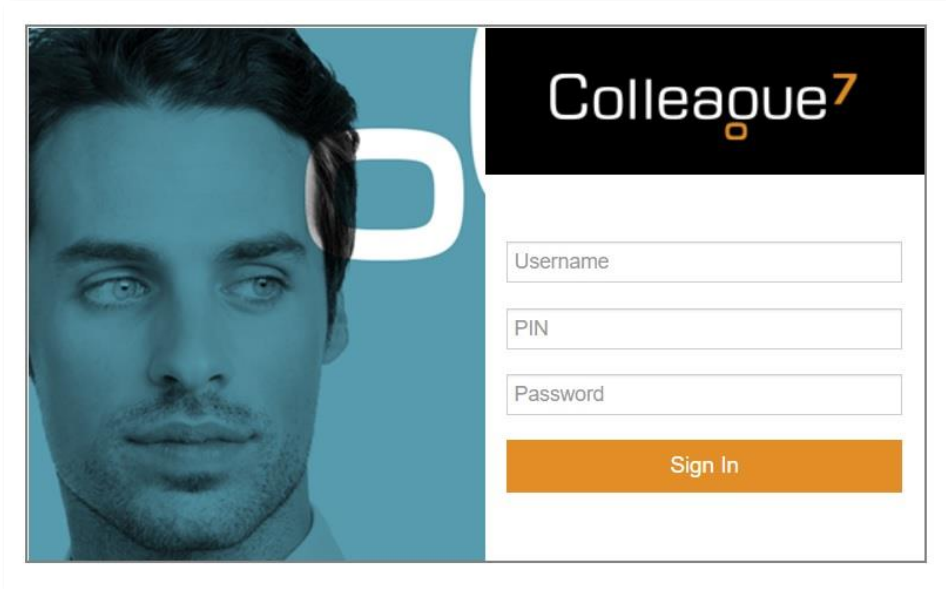
Active: Yes



## Contact Portal

### Login Page

The portal login page can be embedded into your website and branded as required.



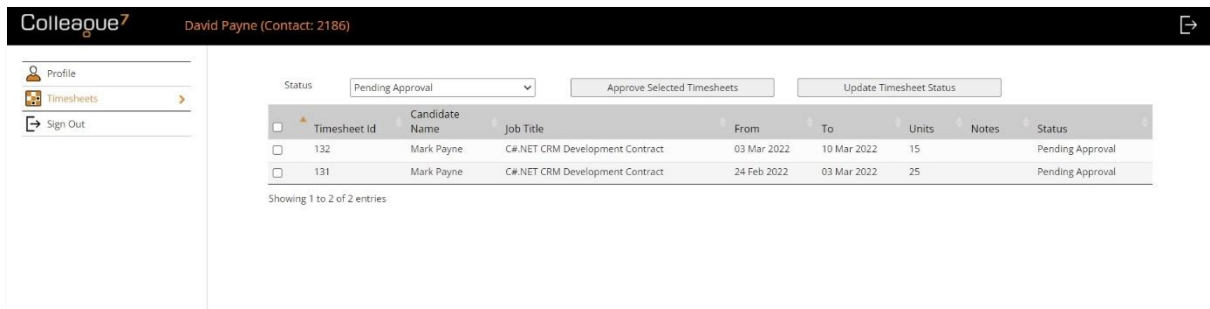
### Profile

Upon successful login, the Contact will access a profile page

This will contain a list of standard fields showing the basic contact information and personal details you hold against the record.

### Timesheets

A Contact will have the option to view the Timesheets that are at the status of 'Pending Approval' or in other statuses. The listed Timesheets will be based on whether the Contact is a primary contact to the Placement or a specified Timesheet Approver (Placement > Back Office tab > Approver)

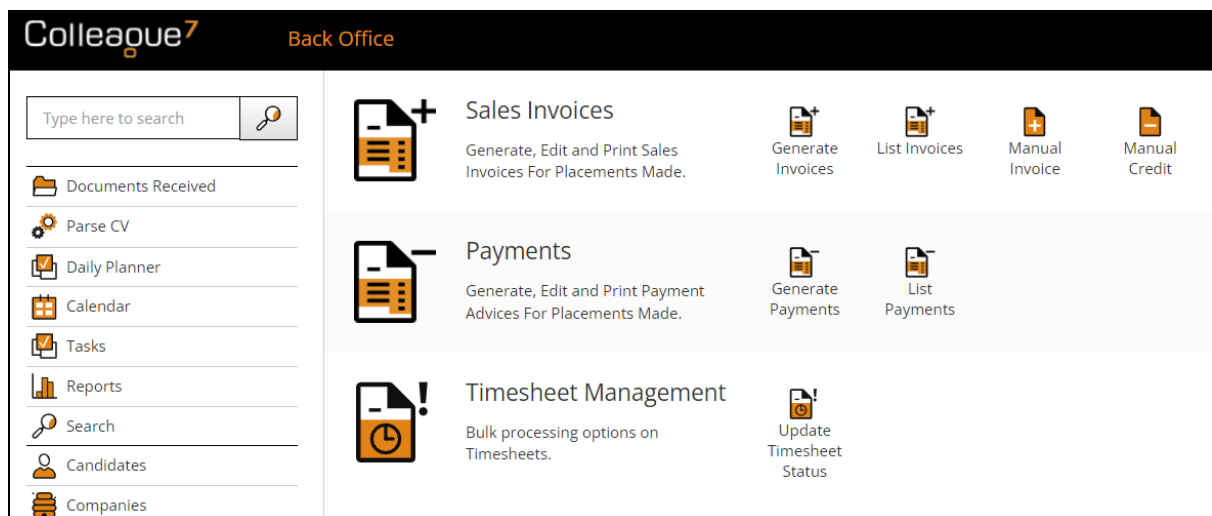


The Contact can then select and approve the Timesheet or edit the Timesheet status as required.

## Back Office

### Timesheet Management

In the event that you want your Contractors to submit their own Timesheets, but your Contact does not wish to commit to approving them. You can utilise the Timesheet Management section within Back Office area.



From within this area you will be able to view all of the submitted timesheets from your Contractors and select, either in bulk or individual, whether to approve.

The screenshot displays the 'Update Timesheet Status' page in the Colleague 7 system. The interface includes a left-hand navigation menu with options like 'Documents Received', 'Parse CV', 'Daily Planner', 'Calendar', 'Tasks', 'Reports', 'Search', 'Candidates', 'Companies', 'Contacts', 'Requirements', 'Interviews', 'Offers', and 'Placements'. The main area features a search bar and several action buttons: 'Go Back To Menu', 'Reset Options', 'Company Lookup', and 'Update Timesheet Status'. Below these, there are filter dropdowns for 'Timesheet Status' (set to 'Ok'), 'Owning Company' (set to 'Colleague Demonstration'), and 'Type' (set to 'Ok'). A table lists 7 timesheet entries with columns for selection, Id, Type, Company, Candidate, and Notes. The first three entries are checked.

| <input type="checkbox"/>            | Id | Type      | Company                       | Candidate           | Notes               |
|-------------------------------------|----|-----------|-------------------------------|---------------------|---------------------|
| <input checked="" type="checkbox"/> | 31 | Timesheet | Norman Communications Limited | Martin Sharpe       | P/E Date : 22 Apr 2 |
| <input checked="" type="checkbox"/> | 38 | Timesheet | Nestle Worldwide              | Dmitri Yakov        | P/E Date : 05 Aug 2 |
| <input checked="" type="checkbox"/> | 46 | Timesheet | BBL Technical                 | Edward O'leary      | P/E Date : 16 Feb 2 |
| <input type="checkbox"/>            | 47 | Timesheet | Dynamite Recruitment          | Ray Andrew Williams | P/E Date : 15 Mar 2 |
| <input type="checkbox"/>            | 57 | Timesheet | Javelin Corporation           | Tony Howarth        | P/E Date : 19 Jun 2 |
| <input type="checkbox"/>            | 56 | Timesheet | Javelin Corporation           | Tony Howarth        | P/E Date : 12 Jun 2 |
| <input type="checkbox"/>            | 71 | Timesheet | Norman Communications Limited | Paul Smith          | P/E Date : 14 Apr 2 |

Showing 1 to 7 of 7 entries

## Generate Invoices

Once approved, the Timesheets will be added within the Generate Invoices area and the standard Back office workflow for invoice generation can proceed.