

Colleague

Colleague Candidate & Contact Portals

Colleague 7 Recruitment CRM

Colleague Software

Colleague Portals

Version 1.3
Author David Payne

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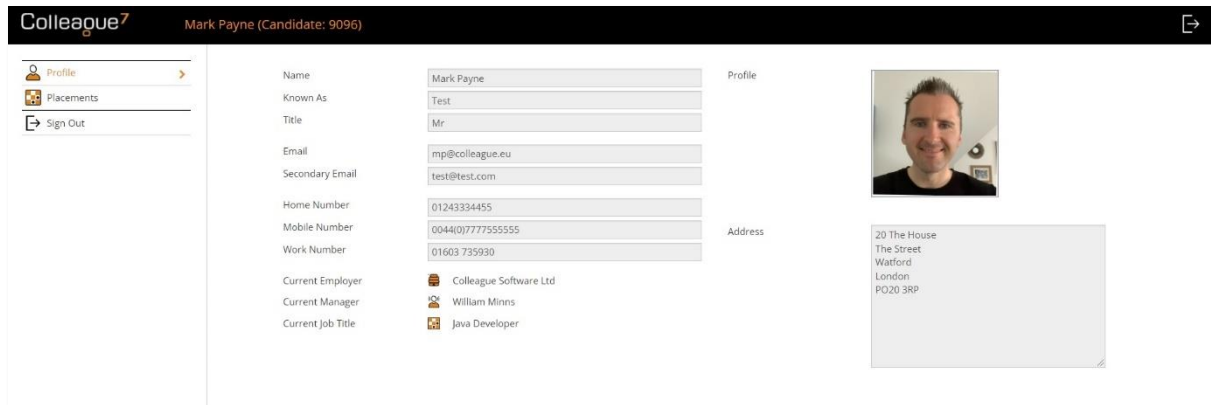
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Colleague Portals





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/or approve timesheets.

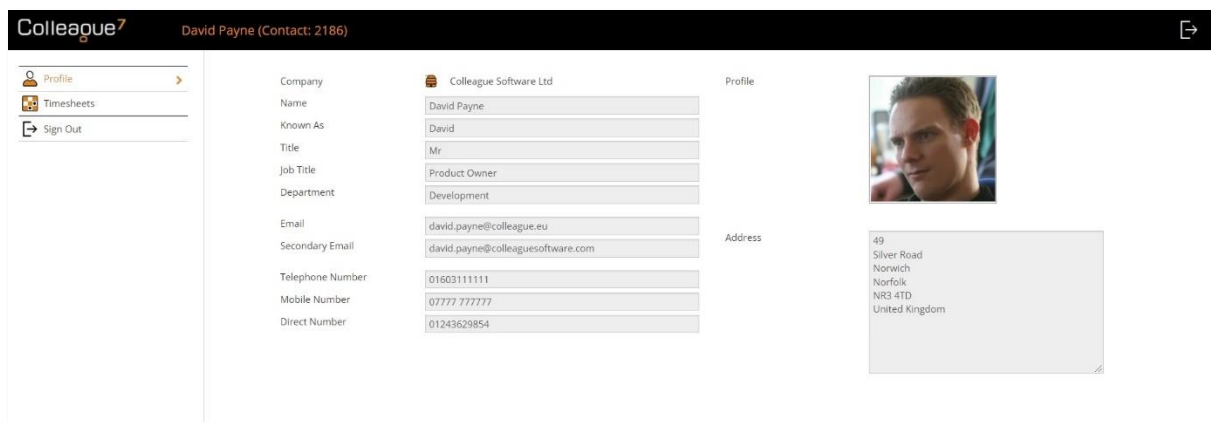
Candidate Portal




The screenshot shows the Colleague7 interface for a candidate named Mark Payne (Candidate ID: 9096). The page is divided into a left sidebar with navigation options (Profile, Placements, Sign Out) and a main content area. The main area contains a form with the following details:

Name	Mark Payne	Profile	
Known As	Test		
Title	Mr		
Email	mp@colleague.eu		
Secondary Email	test@test.com		
Home Number	01243334455	Address	20 The House The Street Watford London 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



The screenshot shows the Colleague7 interface for a contact named David Payne (Contact ID: 2186). The page is divided into a left sidebar with navigation options (Profile, Timesheets, Sign Out) and a main content area. The main area contains a form with the following details:

Company	 Colleague Software Ltd	Profile	
Name	David Payne		
Known As	David		
Title	Mr		
Job Title	Product Owner		
Department	Development	Address	49 Silver Road Norwich Norfolk NR3 4TD 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

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'.

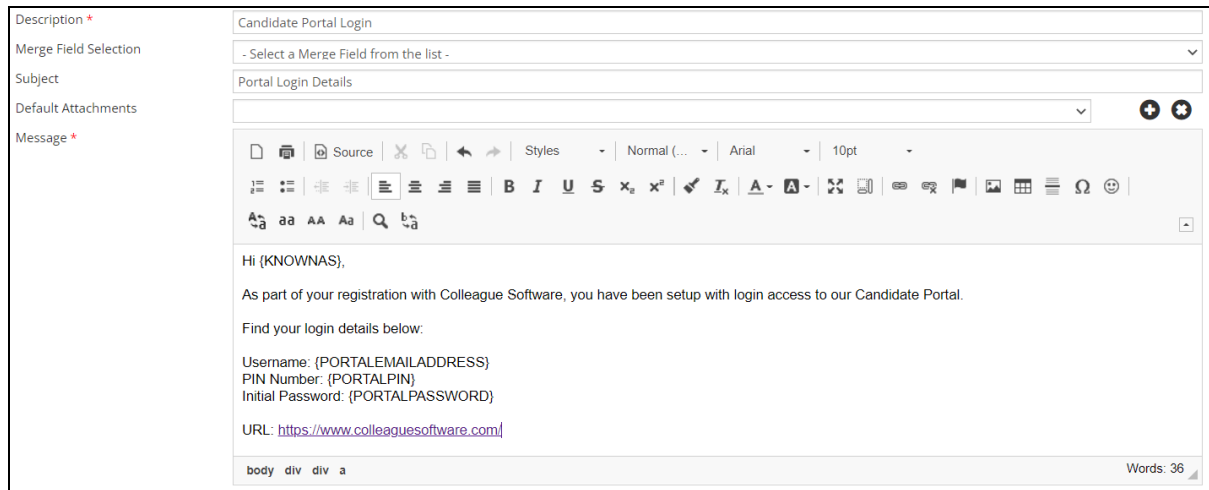
The Username of a Candidate's Portal User will be the Candidate's primary email address.

✓ 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 a default email template.

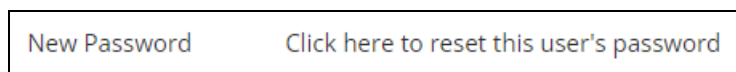


In the event of needing to reset a Candidate's Password, an administrator can access the Portal Users from within the Admin area under 'Users'.



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.



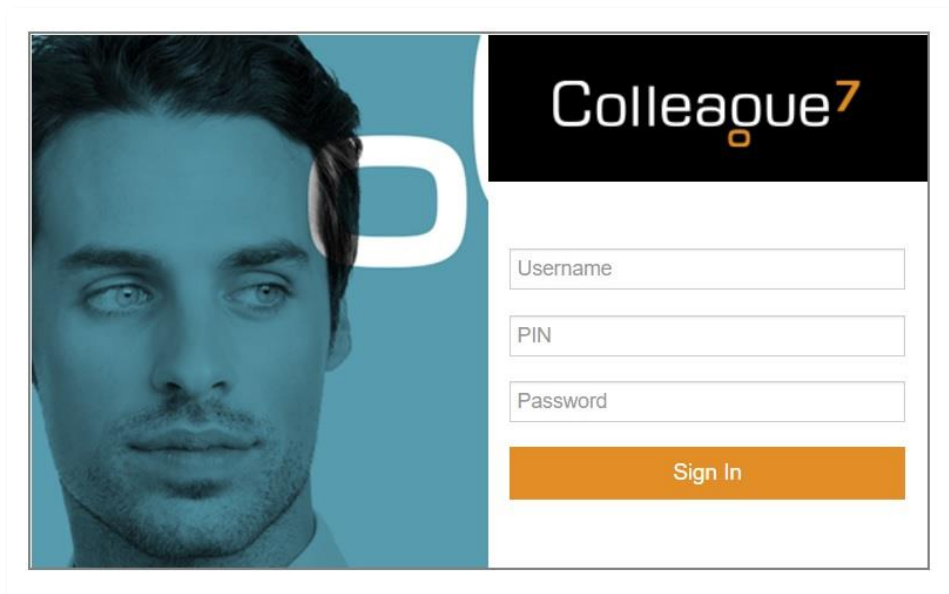
A Portal User can also be deactivated and re-activated from within the Candidate record, via the 'View More' menu under 'Portal Details'. This option will only appear if a Portal User has been created against the record.

	
Deactivate	Cancel
Portal User	<input type="text" value="henrydavies@colleaguedemo.com"/>
PIN	<input type="text" value="559469"/>
Active	<input type="text" value="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.

Documents

Based on a Global Setting, you can configure whether the Candidate can view Documents in the Portal:

System	Allow Documents in the Portal	<input type="text" value="Yes"/>
--------	-------------------------------	----------------------------------

Whether a document can be viewed on the portal is based on a document setting:

Document Information

Description *	<input type="text" value="C7_MS_Packages-and-Pricing.pdf"/>	
Document Type	<input style="border: 1px solid #ccc; width: 100%;" type="text" value="Timesheet"/>	Document Index
Date Uploaded	<input type="text" value="10 Feb 2023 10:16"/>	Uploaded By
Date Amended	<input type="text" value="10 Feb 2023 10:16"/>	Amended By
Default	<input type="checkbox"/>	Document Id
Show in Portal	<input checked="" type="checkbox"/>	

The Candidate can also add Documents via the portal that are then uploaded to their Candidate 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 or Expense (including any associated document).

The screenshot shows the Colleague portal interface for candidate Ellisse Payne (Candidate: 11191). The interface includes a navigation menu on the left with options for Profile, Documents, Placements, and Sign Out. The main content area displays a table of active placements for Colleague Software Ltd, with columns for Company Name, Placement Type (Extension), Job Title (Java Developer), Start Date (01 Jan 2023), End Date (01 Jun 2023), Timesheet (+), and Expenses (+). Below the table, there are buttons for Save, Cancel, and Add New Document. The Timesheet Details section includes a text area for notes and a table for entering timesheet data.

Date	Standard Rate (Daily)	Overtime (Hourly)	Weekends (Daily)
Sat 04 Feb 2023	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Sun 05 Feb 2023	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Mon 06 Feb 2023	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Tue 07 Feb 2023	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Wed 08 Feb 2023	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Thu 09 Feb 2023	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>
Fri 10 Feb 2023	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>

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'.

The Timesheet is draw based on the rates that are set to be shown in the Portal from the Placement.

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 a default email template.

Description *	Contact Portal Login
Merge Field Selection	- Select a Merge Field from the list -
Subject	Portal Login Details
Default Attachments	
Message *	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Hi (KNOWNAS),</p> <p>You have now been setup with login access to our Contact Portal.</p> <p>Find your login details below:</p> <p>Username: {PORTALEMAILADDRESS}</p> <p>PIN Number: {PORTALPIN}</p> <p>Initial Password: {PORTALPASSWORD}</p> <p>Portal URL: https://www.colleaguesoftware.com/</p> </div>
	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.

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

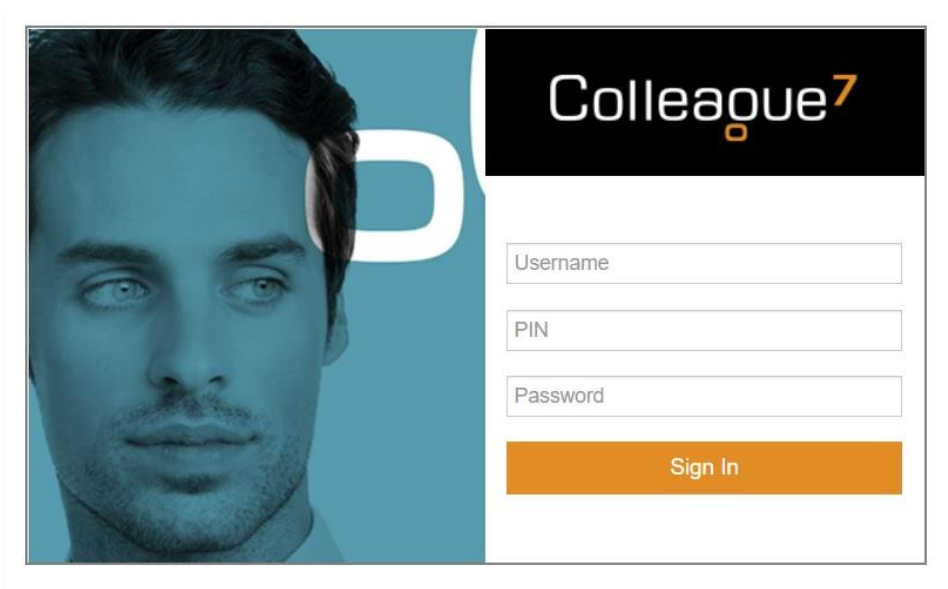
A Portal User can also be deactivated and re-activated from within the Contact record, via the 'View More' menu under 'Portal Details'. This option will only appear if a Portal User has been created against the record.

Deactivate	Cancel
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.



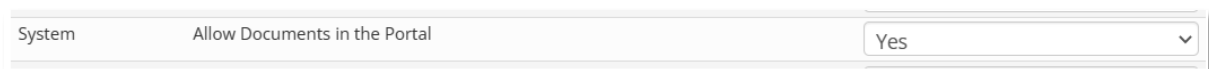
Profile

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.

Documents

Based on a Global Setting, you can configure whether the Contact can view Documents in the Portal:



Whether a document can be viewed on the portal is based on a document setting:

Document Information

Description *	C7_MS_Packages-and-Pricing.pdf	
Document Type	Timesheet ▼	Document Index
Date Uploaded	10 Feb 2023 10:16	Uploaded By
Date Amended	10 Feb 2023 10:16	Amended By
Default	<input type="checkbox"/>	Document Id
Show in Portal	<input checked="" type="checkbox"/>	

The Contact can also add Documents via the portal that are then uploaded to their Candidate record.

Timesheets/Expenses

A Contact will have the option to view the Timesheets that 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 screenshot shows the Colleague7 interface for Dave Payne (Contact: 1014). The left sidebar contains navigation options: Profile, Documents, Timesheets (selected), Expenses, and Sign Out. The main content area displays a table of timesheets with the following data:

Timesheet Id	Candidate	Job Title	From	To	Units	Notes	Status
348	Ellisse Payne	Java Developer	21 Jan 2023	27 Jan 2023	6.5	P/E Date : 27 Jan 2023	Pending Approval

Showing 1 to 1 of 1 entries

The Contact can then select the magnify glass to view the details of the timesheet, any associated documents and then 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 the Back Office area.

The screenshot shows the 'Colleague7 Back Office' dashboard. On the left is a navigation menu with options: Documents Received, Parse CV, Daily Planner, Calendar, Tasks, Reports, Search, Candidates, and Companies. The main area is divided into three sections: 'Sales Invoices' (with sub-options: Generate Invoices, List Invoices, Manual Invoice, Manual Credit), 'Payments' (with sub-options: Generate Payments, List Payments), and 'Timesheet Management' (with sub-option: Update Timesheet Status).

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 shows the 'Update Timesheet Status' page. It features a search bar, navigation buttons (Go Back To Menu, Reset Options, Company Lookup, Update Timesheet Status), and a dropdown for 'Timesheet Status' set to 'Ok'. Below this are filters for 'Owning Company' (Colleague Demonstration), 'Type' (Ok), and 'Currency'. A table lists 7 entries with columns for Id, Type, Company, Candidate, and Notes. The first three entries are checked for selection.

<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.