teamWorks

Creating and administrating portals

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Contents

1 Introduction

teamWorks is a CAS genesisWorld module with which you can provide and manage various data, but also use it as communication platform: company information and workflows are displayed via an Intranet or Extranet for employees or external contacts, such as business partners or customers.

Employees and external contacts only need a browser for the portal and can:

- find appointments and calendars,
- find information on contact persons, employees, documents,
- view standardized processes and checklists, and
- enter or change data.

The portal can be configured individually: the components of the portal, the Internet pages displayed and the design are defined in the Management Console. The administrator or a user with the corresponding rights can administer the portal in the Management console.

Contents in the portal can be received from the CAS genesisWorld database which means that some users work with the Windows client and some with the Web client for teamWorks: in that way, the same data can be entered, viewed and edited in appointments or documents. Double data maintenance is thus avoided.

Specific content for teamWorks is directly maintained in the portal via the browser.

If you want to offer your business partners or customers a custom portal, you can also use a separate database with specific information. You can also control the display of information in the portal using the rights system. Another option would be to replicate data of the CAS genesisWorld database in a separate teamWorks database.

The user guide for administrators mainly explains how to install and set up the portal referring to teamWorks.

- You as administrator will find more detailed information about the individual functions for teamWorks in the online help pages of the Management Console at **teamWorks** and the following sub-pages.

Users can access the online help pages in the portal which can be opened via an icon on the upper right side.

Your benefits

- The operating system on the users's computers is irrelevant because teamWorks is run in a browser.

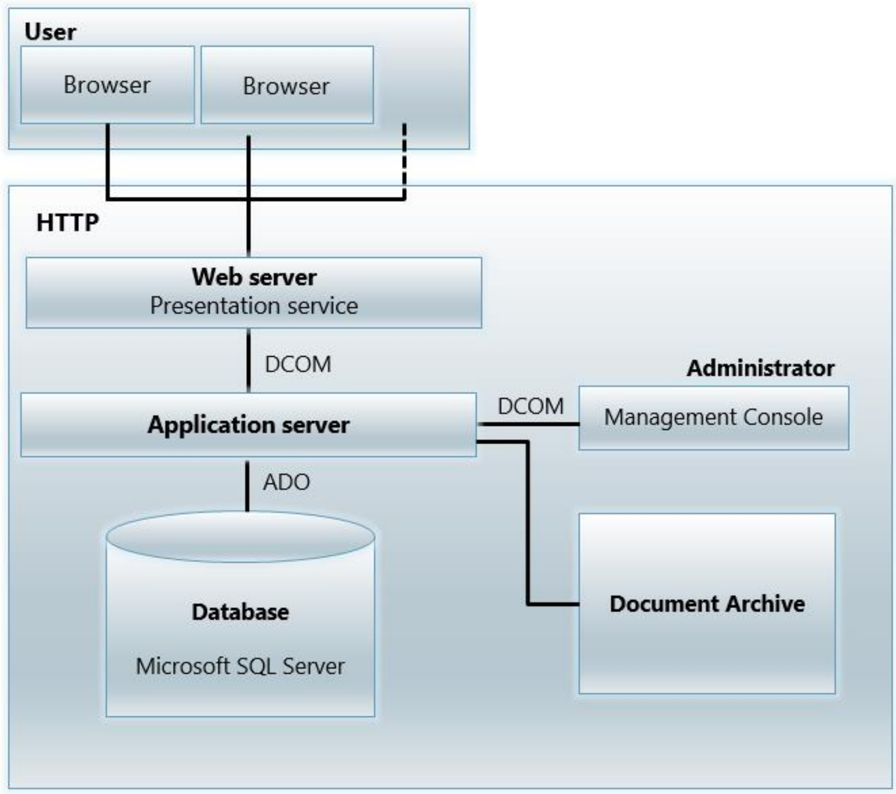
- ☐ With teamWorks, data of CAS genesisWorld can be accessed.
- ☐ Users can simply operate the portal and users who choose to only use a calendar function do not need to work with a complex application.
- ☐ Knowledge transfer and exchange are supported with, for example, company news, an employee list or the Notice board.
- ☐ Rights and access options of CAS genesisWorld also apply to teamWorks. Additional settings for rights and access options for the portal can be defined.
- ☐ The administrator and other users with the corresponding rights are allowed to manage the portal. Programming knowledge is not required.

Important information

- ☐ teamWorks requires a license. The license is entered in the Management Console, in the **Licenses** area, by the administrator and can be activated for specific users.
- ☐ If you deploy editions or additional modules, interdependencies must be considered.
- ☐ If a portal is also to be accessed from the Internet, please consider data security issues.

1.1 teamWorks architecture

The teamWorks architecture differs from the CAS genesisWorld architecture slightly.



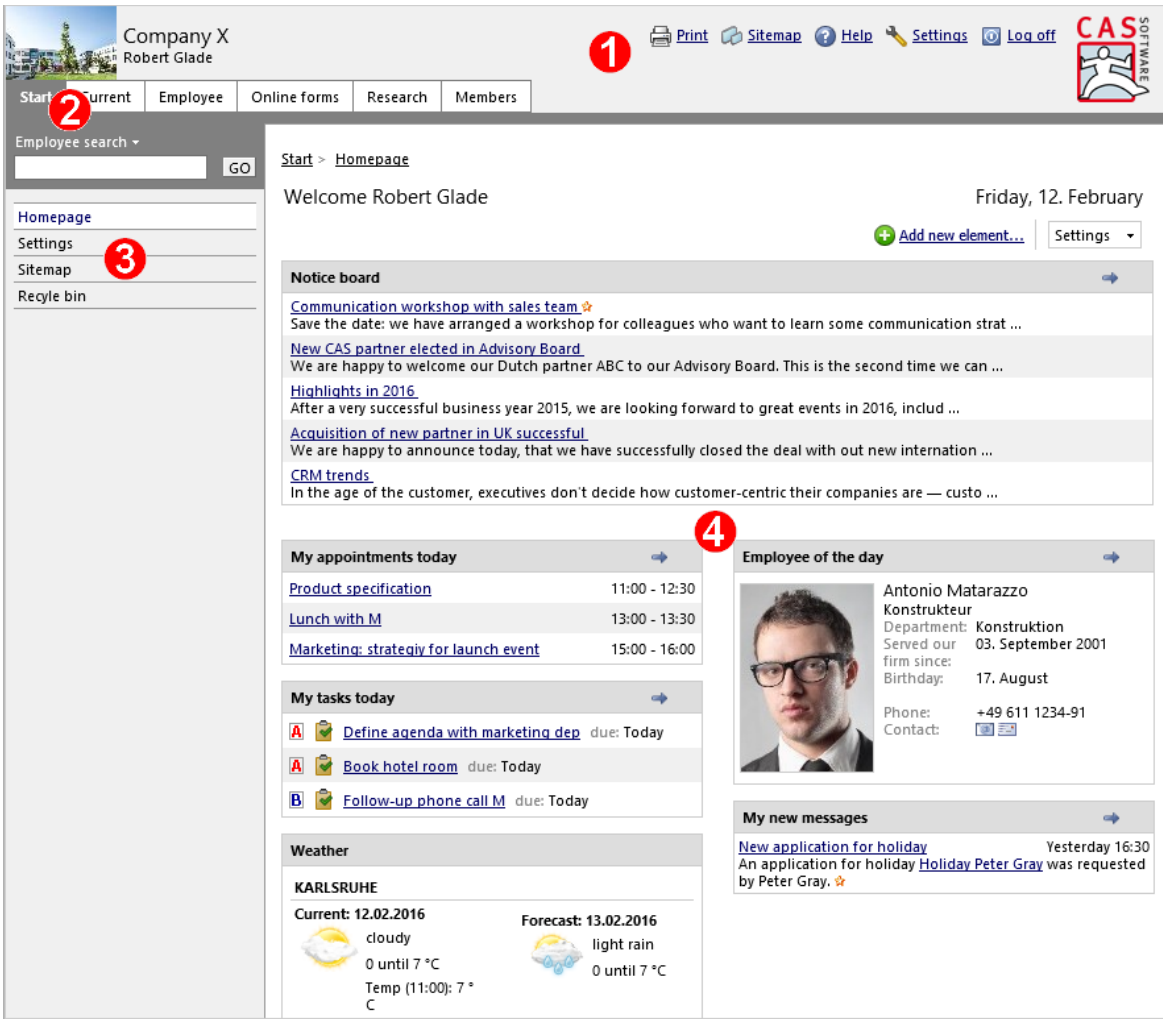
- ☐ The **Web server** makes content available to the users using the presentation services and accesses the database via the application server. Users log on to the **Web server**.
- ☐ A document must be stored in the **Document Archive** to allow users to access it.
- ☐ **Users** access teamWorks using a browser.

1.2 Portal structure

The user portal is run in a browser.

After starting the portal, you must log on. **User name** and **Password** are defined by the administrator.

You will need to enable cookies in your browser settings.



❶ The name of your portal is shown in the top left-hand corner, and the available functions are shown in the top right-hand corner.

- Online help pages are available in the portal.

❷ The information in the main menu is listed according to areas.

❸ Each main menu has a **Navigator** in which information is further sorted.

❹ The **workspace** shows the current information such as a personal start page with elements that can be individually selected, a calendar, and a list of colleagues or a material requisition form.

2 System requirements

teamWorks as CAS genesisWorld module has comparable system requirements. You need to consider which Web server you use and which browsers users may deploy.

2.1 Software requirements

The software requirements apply to the computer teamWorks is installed on.

Microsoft Internet Information Services (IIS) are required as Web server. For some operating systems, IIS is not installed by default and must be installed manually. Microsoft does impose license restrictions with respect to how many users can access IIS at any one time.

Other system requirements for hardware and software are identical with the requirements for CAS genesisWorld. For more information on required or released versions and service packs as well as known restrictions, see the latest release notes at CAS Product Documentation.

2.2 Database

When deploying teamWorks as Intranet, you usually work with the same database as CAS genesisWorld.

When using teamWorks as portal for business partners such as customers or suppliers, you need to consider security issues. You may want to work with a separate database to protect internal data from being accessed by external users. Content of internal databases which is to be published in the external portal can be marked with links and are then, for example, replicated to the external database.

Unicode databases are supported by teamWorks.

For additional information, please go to the online help pages of the Database Wizard at **Customizing the collation**.

A database is accessed via a CAS genesisWorld application server. One or several teamWorks databases are managed with the Database Wizard and the Server Manager via the CAS genesisWorld application server. Online help pages are included in both programs.

2.3 Manage your documents efficiently

If you deploy teamWorks and CAS genesisWorld with the same database, for example, in an Intranet, you access the same Document Archive.

If you deploy several databases or tenants, we recommend to set up a separate Document Archive for each tenant. The Document Archive cannot be changed later.

You need to consider some points for teamWorks when working with archive files from the Document Archive:

- teamWorks users can only access archive files which are saved in the Document Archive because you cannot access file references from the Internet.
- Due to a lock mechanism, like in the Desktop client, an archive file cannot be edited by two users at the same time. Users can also unlock the lock in teamWorks.
- Archive documents can include any number of archive files. Executable files cannot be edited directly. These include files with the following extensions: exe, com, bat, vbs, scr, cmd, pif, lnk, vbe, js, jse, vxd, chm, eml.
- In their portal settings, users define whether they want to edit archive files manually or automatically. Automatically: an archive file, if possible, can be opened directly in the corresponding application and can immediately be edited, for example, a Word document. Manually: an archive file is stored in a folder and can be re-imported to teamWorks after it has been edited. You must install the CAS Smart Add-on for the automatic editing function. If users have selected the automatic editing function, they will receive a message when they open an archive file and can install the CAS Smart Add-on.

  The CAS Smart Add-on supports common browsers. For more information, go to our CAS Product Documentation.

The different document types in teamWorks have different names than the ones in the Desktop client. This information can be important if you create document lists in the portal. Available fields and field names, for example for filters are identical in teamWorks and in the Desktop client.

- A memo in teamWorks corresponds to a CAS genesisWorld short note in the Desktop client.
- A link in teamWorks corresponds to a CAS genesisWorld Internet address.
- An archive file in teamWorks corresponds to a CAS genesisWorld document data record with an archive file.

2.4 Requirements for users

teamWorks users only need one browser.

Make sure to download the security updates of the deployed browsers. We recommend always using the latest version to reduce the risk of vulnerability.

To edit archive files automatically, users can install the CAS Smart Add-on.

3 Installing and updating teamWorks

teamWorks requires a separate installation. The installation of teamWorks is similar to the CAS genesisWorld installation.

You can update teamWorks with the update service if an update is available. CAS genesisWorld and teamWorks must be available in the same version.

You can use teamWorks to create portals. Each portal is based on delivered templates which you can change according to your requirements. The provided templates and your customizations are stored separately. It may be possible that teamWorks templates are changed during a software update. However, this does not mean that your own custom templates are changed.

3.1 Folder, Web folder and alias names

- ☑ During installation, you select a folder for teamWorks. You will see the ..\Program Files (x86)\CAS-Software\CAS teamWorks folder as standard option.
- ☑ You can select a folder as **Web folder** during installation.

  This is the folder for your portal with your customizations.

  Usually, it is the ..\Program Files (x86)\CAS-Software\CAS teamWorks\Portals folder.

You use this folder to store all files and custom portal pages which you have created with the delivered templates.

- ☑ If you create more portals with teamWorks after the installation, you will see one folder for each portal in the **Web folder**.

> The folders with the customizations of the portal for your company must also be backed up.

- ☑ On the Web server, you create another virtual directory with any **alias name**. The portal can be accessed via the name of the virtual directory.

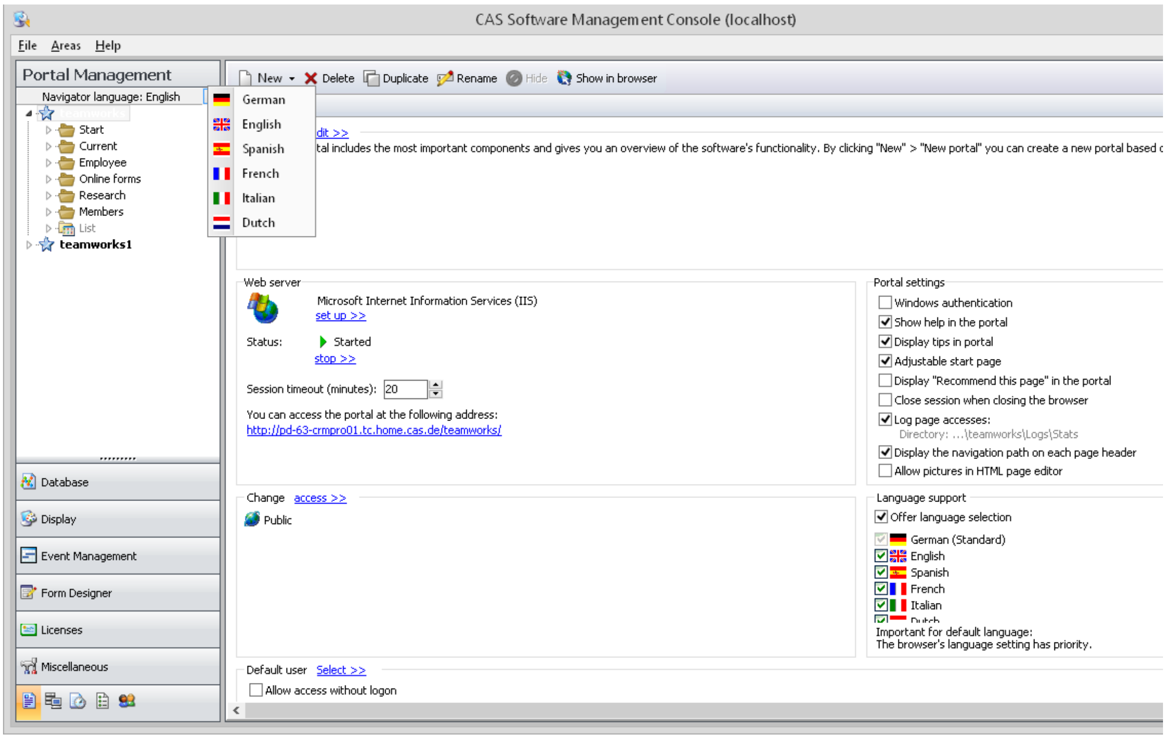
When deinstalling teamWorks, the installation wizard is opened. When deinstalling teamWorks, you can select which portal folders are to be deleted from the hard drive. Virtual folders are always deleted.

3.2 Languages

You can install the same languages for teamWorks than for CAS genesisWorld if you have installed the corresponding language packages for teamWorks.

The templates for the navigator, components and pages in teamWorks are available in multiple languages.

☑ On the first page in the **Portal management** area, activate the desired language with the **Language support** function.



You will find additional information in the online help pages of the Management Console on the **Portal functions** and **Toolbar for a portal** pages.

Multilingual navigator

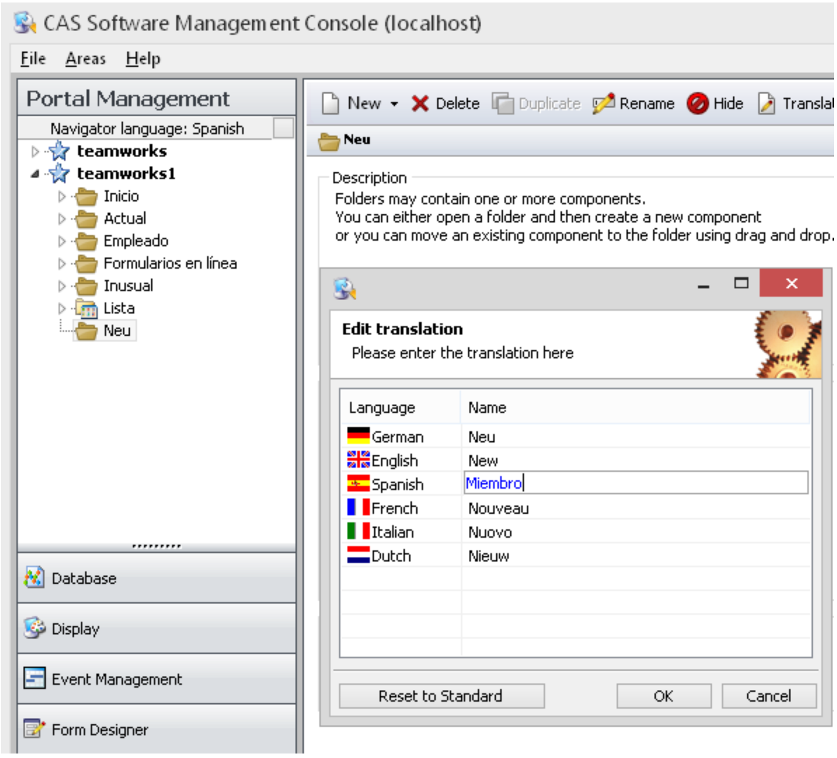
The entries in the navigator of the delivered version and/or the demo portal exist in every language that you have activated with the **Language support** function.

You enter own entries in the navigator by inserting folders, components or pages. If you name these entries individually, these entries are no longer available in multiple languages.

For example, you have created the portal in German and inserted folders, components and pages. An additional folder **Employees** contains the **All members** list and the **Become member** form. The portal should also be available in Spanish. The individual entries should therefore be translated into Spanish.

☑ Create a new folder. The **Edit translation window** opens and you can enter the **Name** in Spanish and other languages.

☑ After you have created the folder, you change the name of a folder by pressing F2 or selecting **Rename** in the context menu or select the folder and click **Translate** in the toolbar.

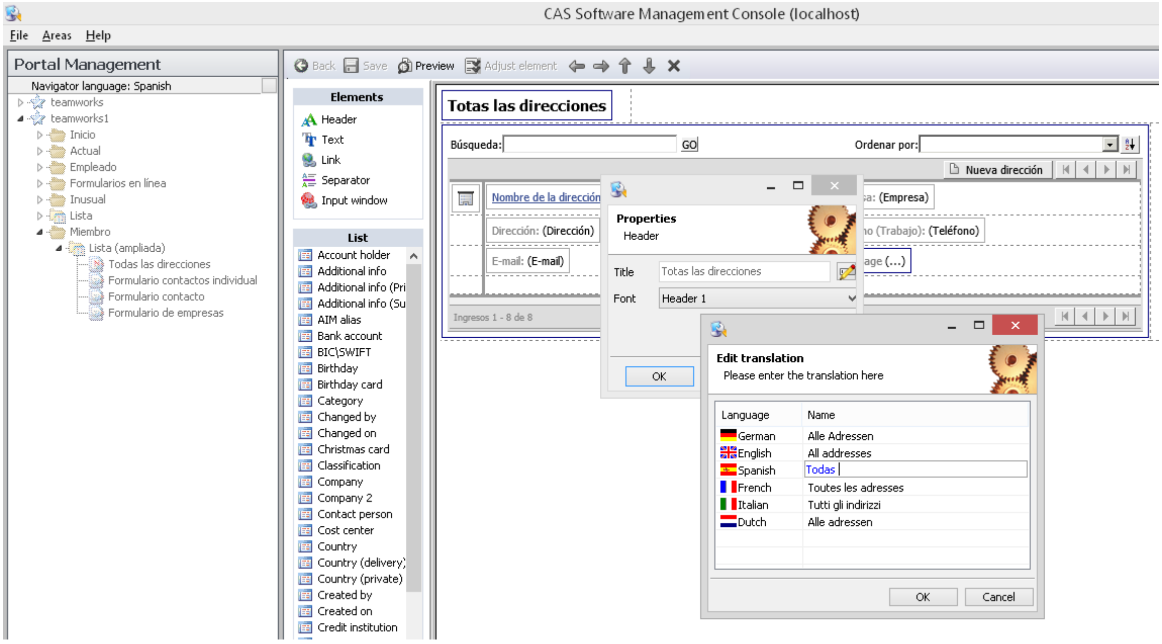


The displayed **Navigator language** in the upper left corner of the **Portal management** area is the language with which you have logged on to the Management Console.

☑ Click on the icon next to **Navigator language: ...** and select **Spanish** in the context menu. Now you see all already existing Spanish entries.

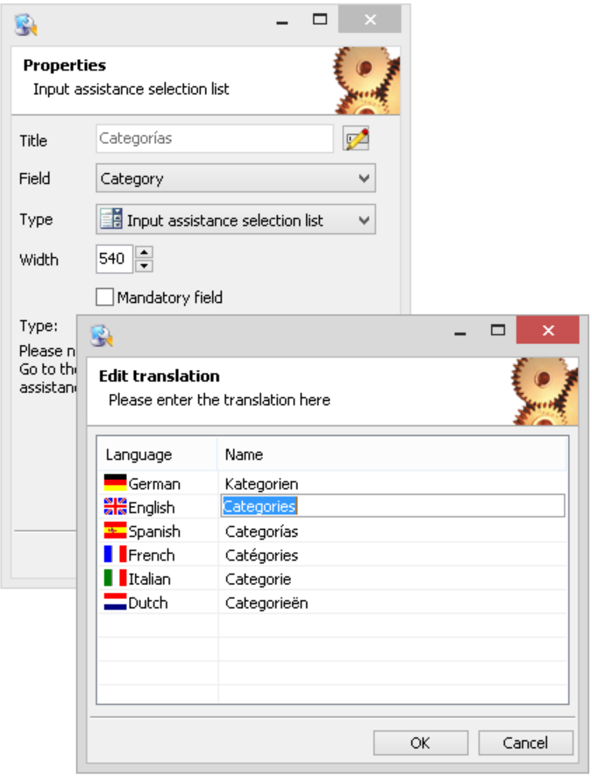
The name of the fields in a page, such as a list or a form, are automatically included in the corresponding language.

Click **Adjust element** on the corresponding page after you have opened a page and selected an element.



☑ You change names in the **Properties** window with the **Edit translation** button.

☑ With teamWorks, you can also create international input assistance options and input assistance options for groups. If you have defined input assistance options for a field, the **Input assistance selection list** element will be displayed in forms.



3.3 Database system

You can use the same database for teamWorks that you use for CAS genesisWorld. When installing the portal, the default database connected with the application server is used.

☑ The database and the access information are entered in the installation wizard on the **Selection of a database system** and **Database access**.

If you deploy a CAS genesisWorld database, you have automatically selected the CAS genesisWorld Document Archive.

If you create a new database for teamWorks, you automatically create a new Document Archive.

> If you work with several databases and Document Archives, please consider this fact when assigning rights to the Windows user of the application server: make sure that this user has read and write rights to the respective folders of the Document Archive.

Extranet with a second database

If you create an extranet for business partners and customer, we recommend the installation of teamWorks on a separate computer and eventually on a separate database.

An extranet should be accessible by external sources.

> Please consider possible security risks when setting up programs which can be accessed from anywhere.

☑ Install an application server for CAS genesisWorld and a database system on a separate computer.

☑ You can also install teamWorks on this computer.

☑ During installation, you can create a database or you enter the **Database access** for an already existing database for the extranet.

☑ A Document Archive is connected to a database so you have a separate Document Archive for the extranet.

☑ You can log on to any application server of CAS genesisWorld with the Management Console.

☑ When logging on, you specify the application server and the database for the extranet and administer the information for business partners and customers in the **Portal management** area.

3.4 Updating teamWorks

You have two options to make sure you always work with a current teamWorks version:

- ☐ Using the update service, or
- ☐ the distributed installation with update mechanism.

If you make a software update for a main version, it may occur that delivered templates for teamWorks are updated that are stored in the ..\Program Files (x86)\Common Files\CAS-Software_Portals folder. The templates are always completely de-installed and then re-installed.

The pages you have customized for a portal are not changed by a software update. These files are stored by default in the ..\Program Files (x86)\CAS-Software\CAS teamWorks\Portals folder.

Important

> When installing software updates, especially main versions, the database model of CAS genesisWorld is changed. It may occur that templates for components and portal pages are changed. Customized pages of your company are not changed by a software update.
>
> If new data record types are supported and the corresponding pages will be used, own pages can be entered in the portal. A corresponding component is usually provided. This applies if custom data record types were created by yourself or your CAS partner.
>
> This also applies for new fields or additional functions, such as, additional fields with a possible setting as mandatory field.

4 Backing up and securing data

You can use a backup copy to avoid data loss.

The pages for one or several portals that you have customized are stored by default in the ..\Program Files (x86)\CAS-Software\CAS teamWorks\Portals folder.

- ☑ The administrator creates a backup of the folders in which the portals are stored.
- ☑ Back up the theme you have used in the ..\Program Files (x86)\CAS-Software\CAS teamWorks\Portals_Schemata folder.
- ☑ Back up also the Document Archive if you have set up separate document archives for one or several portals.
- ☑ If you use an external data source for the **List** or **List (expanded)** components, you also need to back up the data of the external data source.

Data security

If you deploy teamWorks as extranet for customers or business partners, you can access the portal from outside your network.

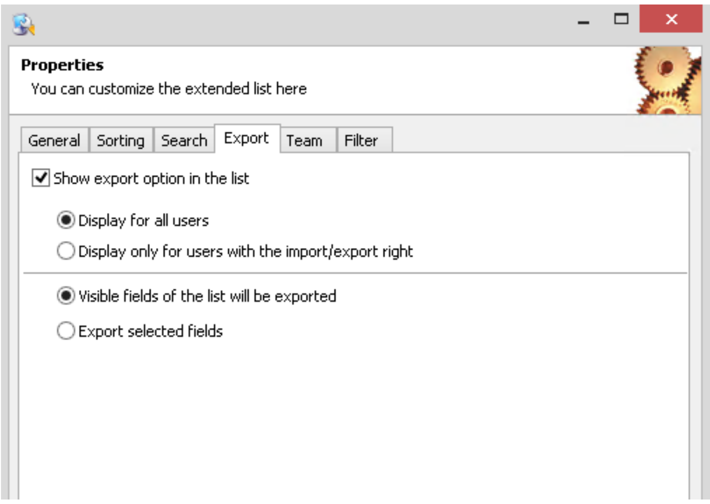
> Please consider possible security risks.

The export of data by users via the Desktop client can be restricted using the rights system.

You can find additional information on the online help pages of the Management Console on the **Importing and exporting data** page.

In the **Portal management** area, differing settings for all teamWorks lists can be defined in the **Export** tab of the properties. This does not apply if you use **External data sources** for a list; in this case, the **Export** tab does not exist for a list.

> The setting when creating a component is **Show export option in the list**.



5 teamWorks, CAS genesisWorld and additional modules

Many functions and fields with auto functions in the Desktop client of CAS genesisWorld are also supported in teamWorks. Some special considerations must be kept in mind.

5.1 Notifications

Notifications can include a link to a data record in teamWorks or in CAS genesisWorld Web or a GBT file for the Desktop client of CAS genesisWorld.

Users define in the settings of the portal which notifications they want to receive. The same settings can be defined in the Desktop client. The administrator's settings overwrite the user's settings, and vice versa. The most recent settings always apply

Only in teamWorks and only for the Holiday administration, Requests, Document life cycle and Short messages components exists the additional option for notifications. This type of notification is partly send automatically in teamWorks and can be displayed in two portal locations: on the **Personal homepage** with the **Notifications** element and with the **Notifications** component in the navigator.

Short messages for holidays or requests, for example, can still be sent even if you do not use an e-mail server. If you use an e-mail server or if you have an e-mail address, then notifications for holidays, requests, and so on, can also be sent via e-mail in addition to short messages.

Users can define in the settings of the portal whether they only want to notifications in the portal or additionally via e-mail.

If you as user have access to more than one portal, then you must select which portal your notifications are to be sent to. You can do this in the notification settings.

A link to teamWorks must be inserted in a notification text to be available in notifications with an e-mail. You can do this in the **Action** tab for fields in notifications.

You will find additional information in the online help pages of the Management Console or in the online help pages for users on the **Notification action** page.

If users are also to receive notifications via e-mail, each user needs an e-mail address and an e-mail client. teamWorks does not support e-mail functions.

Notifications and actions cannot be created for data record types which have been created using the example components of the teamWorks portal management.

You can find additional information in the online help pages of the Management Console on the **Example components** page.

Opening data records via notifications

In the teamWorks portal, a CAS genesisWorld icon can be displayed for data records in forms. By clicking on the icon, the corresponding data record in the CAS genesisWorld Desktop client opens. The Desktop client must be installed to use this function.

The administrator inserts the **Input window** element in the form of a component for a list.

5.2 Auto functions for data records

5.2.1 Rights to data records

Owner rights and external access rights apply for both teamWorks and the Desktop client if you work with the same database. Changed rights for data records in teamWorks and in the Desktop client overwrite each other. The last setting is the one that always applies.

If the administrator has given the necessary permissions, the general external access can be defined individually for each data record type in the Desktop client.

You will find more information in the online help pages for Management Console on the **Access rights** page, and in the online help for users on the **Settings: Assigning external access rights** page.

In teamWorks, you can define the following Owner rights for data records: **Full access** or **Read**. In the CAS genesisWorld Desktop client, rights can be defined in more detail if the administrator has given the corresponding permissions. If a user opens data records with more detailed rights in teamWorks, then the set rights in the Desktop client are also displayed in the teamWorks form.

The shares and roles of teamWorks are added to the rights for data records and can extend or restrict the access to data.

5.2.2 Supported and new data record types and fields

Most default data record types of CAS genesisWorld can be used in teamWorks. Even if there is no specific component available for a data record type, a link list, a list or an expanded list can be deployed.

The following data record types are not supported in teamWorks: Campaigns, Phone calls, Opportunities and Distribution lists. E-mails are also not supported in teamWorks.

If you are deploying modules such as Sales pro or Report and add additional data records, you can often also create link overviews, lists or expanded lists in teamWorks. This does not apply to all additional data record types for modules. Components for additional module data record types must be manually created in teamWorks.

This also applies if you or your CAS Partner create new data record types or new fields in the **Database area** of the Management Console. You can create the Link overview, List or List (expanded) components for new data record types. New fields can be inserted into new or existing pages for the portal.

Defining icons for own data record types

In the settings for a data record type in the **Database** area of the Management Console, you can set icons for own data record types.

☑ In the **Icons** tab, you can define the icons for the data record type. By clicking **Change**, you open the file selection.

For additional information, please refer to the online help pages of the Management Console at **Editing data record types**.

To display own icons in the dashboard and in the portals for teamWorks you have to complete another step.

☐ Create a GIF file with 16x16 pixels.

☐ Copy the GIF file to ..\Portals\Portalname\images\Objects.

5.2.3 Numbering

The automatic number generation is supported in teamWorks. If specifications for the automatic creation of a number exist, an icon for a field is displayed. The number can then be generated automatically and entered in the field using this icon.

If the administrator has defined defaults in the **Number assignment** area of the Management console for a data record type, the icon is displayed automatically in the **Number** field in the portal.

You find additional information in the online help pages of the Management Console on the **Number assignment** page.

5.2.4 Input assistance

In teamWorks, you can select a **Selection list** or a **Checkbox list** for all fields of a page. The defaults used as input assistance options in the portal are entered by the administrator in the respective form for each field in the **Portal management** area.

A **User selection list** displays all users of CAS genesisWorld or only certain users who are also defined by the administrator in the portal management area.

A **selection list for input assistance options** offers all input assistance options in the same way as in the Desktop client, if the respective defaults are defined for a field in the **Database** area of the Management Console.

5.2.5 Links

Links are supported with restrictions in teamWorks. Primary links of the Premium Edition are not supported.

It is possible to display linked data records of certain data record types in components for projects and in link overviews, and also enter new links and remove links. With the **Aggregated view of linked data records** element, an analysis or a summary of certain data records.

5.2.6 Mandatory fields

Mandatory fields in CAS genesisWorld and modules can be defined:

- **New column**/**Customize column** opens a window with which you can activate the **Mandatory field** option for a new or already existing field in the **Database** area of the Management Console.

  The **Can be duplicated** setting is not relevant for teamWorks, as the duplicate function is not supported for data records in teamWorks.

For additional information, please go to the online help pages of the Management Console on the **Editing a column for the data record type** page.

- ☐ With the Form & Database Designer module, new or newly inserted fields can be defined as mandatory field in data record windows.

Additional information can be found in the online help pages for the Management Console on the **Fields** page.

- ☐ With the Premium Edition, you can define mandatory fields depending on the input assistance options that were selected for the **Type** and **Status** fields.

  The **Type** and **Status** fields can also be inserted in a teamWorks form when working with the Premium Edition. The fields are always entered together and the properties of this element cannot be changed.

  If mandatory fields are defined depending on the selections for the **Type** and **Status** fields in the **Database** area, these fields automatically become mandatory fields in a form. This does only apply if **Type** and **Status** are used in a form. Checking mandatory fields also requires that checked fields are displayed in the form and that they can be filled in by users.

You find additional information in the online help pages of the Management Console on the **Input assistance for the Type and Status fields** page.

- ☐ If you insert a field in the **Portal management** area in a teamWorks form, the **Mandatory field** option can be set in the data record field properties.

You can find additional information in the online help pages of the Management Console on the **Properties of data fields** page.

Some of these settings for mandatory fields are independent. For example, the definition of a mandatory field in teamWorks does not affect the settings for a certain field in the database. However, defaults for mandatory fields for **Type** and **Status** do affect teamWorks.

Mandatory fields are checked in the respective client, not on the application server. If a mandatory field is to be checked in teamWorks, this setting must be defined in the corresponding fields and forms.

Both in the Desktop client and in teamWorks, certain tabs or fields cannot be displayed in a data record. Mandatory fields that are hidden for users are not checked when the data record is saved.

You find more information in the online help pages of the Management Console on the **Checking mandatory fields** page.

5.3 Premium Edition and teamWorks

- Primary links are not supported in teamWorks.
- The **Type** and **Status** fields and also mandatory fields depending on these fields are supported in teamWorks.
- The **Project status** field can be entered in teamWorks forms.
- Hierarchical input assistance options are not supported in teamWorks.
- The visibility function for tabs for the **Type** and **Status** fields is not automatically adopted for teamWorks.

5.4 Important to know for teamWorks and other modules

Exchange sync

As the participant of an appointment, you can change your own appointment in teamWorks. However, if you change the appointment as the organizer, then the appointments of the other participants are also updated as is usually the case.

If you delete an appointment in teamWorks, then you will be removed as a participant from the appointment. And if you delete an appointment as an organizer, then the appointment will be deleted for everyone as is usually the case.

You can create your own appointments, but inviting additional participants is not supported.

If absences from work are created in teamWorks, these are used to create appointments for other users. Absences are not synchronized with Microsoft Exchange.

We recommend to hide the **Change log** tab for appointments.

In **teamWorks**, you activate the display of the **Change log** tab for appointments in the **Portal Management** area.

Form & Database Designer

You can create new data record types and fields with the Form Designer.

For teamWorks new data record type formulas are customized in the **Portal management** area of the Management Console.

6 Management Console

With the teamWorks module, additional areas and functions are available in the Management Console. The portal configuration, the design and the corresponding functions are described in the online help pages of the Management Console. The following sections will give you an overview and describe the basics for the main functions.

> It may be necessary to delete the cache to display a changed portal or a changed display of the portal in the browser.

6.1 Portal: Processes and functions

The first steps for the portal are made in the Management Console.

teamWorks requires a license. The license is entered in the Management Console, in the **Licenses** area, by the administrator and can be activated for specific users.

Testing and planning

By creating a demo portal, you will get a first overview over the teamWorks functions. A demo portal contains the most important components. Each component and page is shown with a description.

You can select and drag and drop individual components or pages from the demo portal to your portal.

For more information, see **Creating demo portals** in the online help for the Management Console.

Managing portals

The **Portal management** area of the Management Console displays all the portals for all the databases.

Portals displayed in color are contained in the database you are currently logged on to. Portals displayed in grey are included in one or several different databases which are connected to the application server.

If you click on a portal of a different database, a hint is opened. Now you can log on to the database the portal is assigned to.

> If you log on, you also assign the portal of the other database to the one you currently log on to.

In the **Portal Management** area, you will find functions to create, structure and size a portal.

You find additional information in the online help pages of the Management Console on the **Portal Management area: teamWorks** page.

Designing the portal

In the **Display** area of the Management Console, you design the appearance of the portals.

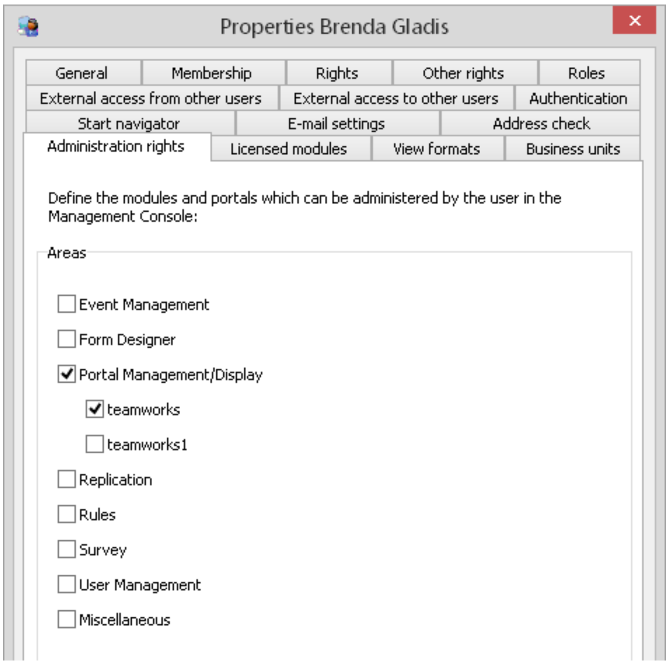
Here, you can embed a picture in the upper left corner as banner and the logo of your company to the right; you can also define font sizes and colors for your portal.

You will find more information in the online help pages of the Management Console on the **Display area** page.

6.2 Administration

The teamWorks portal can be administered and maintained in the Management Console by the administrator, but also by users with the corresponding rights.

☑ You can assign the corresponding rights in the **Properties** window, **Administration rights** tab.



6.3 Rights, shares and roles

In addition to the rights and external access rights concepts, two more right concepts define the access options of users to data records:

- Sharing elements and pages in portals
- Assigning users to roles, including the relationships between users based on role

6.3.1 Owner rights and external rights

Settings for owner rights and external access rights defined in the Management Console and for users in the Desktop client or other clients are also applied in teamWorks.

Whether users are allowed to define the general external access is defined by the administrator in the Management Console in the **User management** area. If you as administrator activate the **Set up external access rights** option in the user properties, users can also define general external access rights.

Users find settings for the general external access in the Desktop client in **Properties > General**.

In teamWorks, these settings for the general external access are defined in the portal in **Administer external access > Settings**.

Settings defined by users in teamWorks and in the Desktop client overwrite each other. The last setting is the one that always applies.

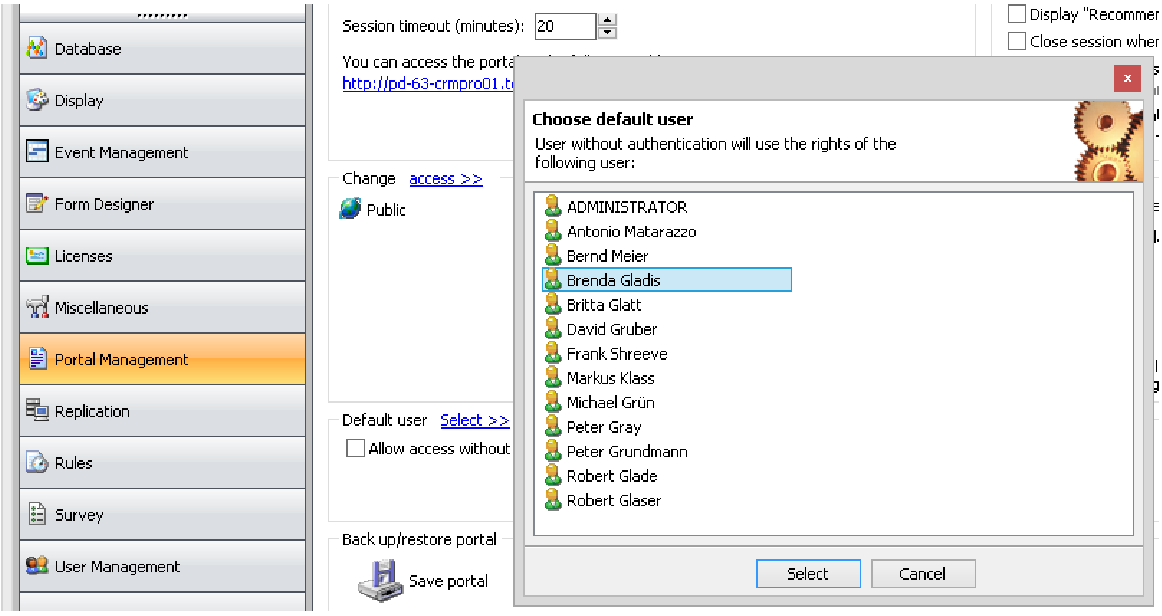
6.3.2 Standard user and guest access

Portal shares always apply to users. Defaults and restrictions are set for the standard user and/or a guest access.

If you want to create an extranet for external contacts like business partners or customers, a default user and, if necessary, a guest access may be helpful.

> The default user in the **User management** area serves as template to create new users and is deactivated to not use a license.

The **Default user** for teamWorks is a special setting in the **Portal management** area which is not connected to the general default user.



- The **Default user** account for teamWorks is a special CAS genesisWorld user account that requires a license.
- Using this user account, a number of persons can access teamWorks, for example, business partners or customers.
- Users can access the portal with the user name of the **Default user** with or without a logon.

  If the **Allow access without logon** option is selected, the portal opens, bypassing the logon page. Instead, you enter a text with the **Change salutation text** option.
- A personal start page is possible for this user or this user account, i.e for business partners or customers.
- Rights and external access rights for this user are defined, similar to CAS genesisWorld, in the **User management** area.
- In the **Portal management** area of the Management Console, you define the shares and roles for this user.

For additional information, please refer to the online help pages of the Management Console on the **The default user** page.

An additional or alternative option is a **guest access**. The access rights for a guest access restricted more than the ones for the default user.

- A guest access is based on a CAS genesisWorld user.
- The user for the guest access has restricted external access rights, no access rights via the All (public) user and cannot change the password.

You will find additional information in the online help pages of the Management Console on the **Guest access** page.

6.3.3 Sharing elements and pages

You permit shares for each component and each page in the **Portal management** area of the Management Console. By doing so, you define for which users or groups which components and/or pages are displayed.

These shares are not relevant for the rights to data record types which are defined in the **Database** area of the Management Console.

> Different rights for data record types and shares are added together for users and the highest right applies.

Examples

Components are based on CAS genesisWorld data record types. If users have no rights to the corresponding data records, they cannot use this component even if it is shared for teamWorks. For example, this applies to the notice board or the discussion forum if users have no access rights to documents.

But on the other hand it is possible to display components and/or pages in teamWorks even if a data record type is not user sensitive, that is, public. Addresses in CAS genesisWorld are public but should only be accessible in the portal by the sales team. Thus, you share the Addresses component only with the Sales group. All other users will then not be able to see pages of this component in the portal.

6.3.4 Roles

In teamWorks, specific users and groups have specific roles.

- Roles comprise specific rights for specific operations, for example, the right to submit or process a request.
- Roles can include specific rights that relate to other users or groups.

For example, when a user or group is assigned a role that relates to other users or groups, a relationship is formed. The "owner" of this role then has defined rights to the users or groups that are "related" to this role.

- You can define specific rights for the various components (e.g. the **Request**, **Notice board** or **Holiday administration** components), and you can then assign these rights to specific roles.
- By sharing elements and pages, you can determine which users and groups are able to see and edit which elements and pages. The rights of roles must be added to these shares. If you only allocate shares, then users will still not be able to view these pages if you have not assigned rights to the roles for these pages. Only when you assign the corresponding rights to a particular role, will the users who have been assigned this role be able to view and edit these pages.

Example for holiday administration

In the **Portal management** area, the **Holiday administration** component is shared for all users.

In the **User Management > Access rights** folder, the **Activate external access rights** and **Activate external access rights depending on group membership rights** options are activated.

In the **User management** area, it is defined that all users have full rights to the **Holiday** data record type.

The team leader and his assistant are members of a group. All members of the group have full rights within the group.

With full rights in the group, all members of the group have the **Read** external access right to all data records of the other members. This general **Read** external access right always applies if the special external access right is not reduced for a data record.

In the **Roles** folder of the **User management** area, you open for the **One for one** role the **Properties - one for one window**.

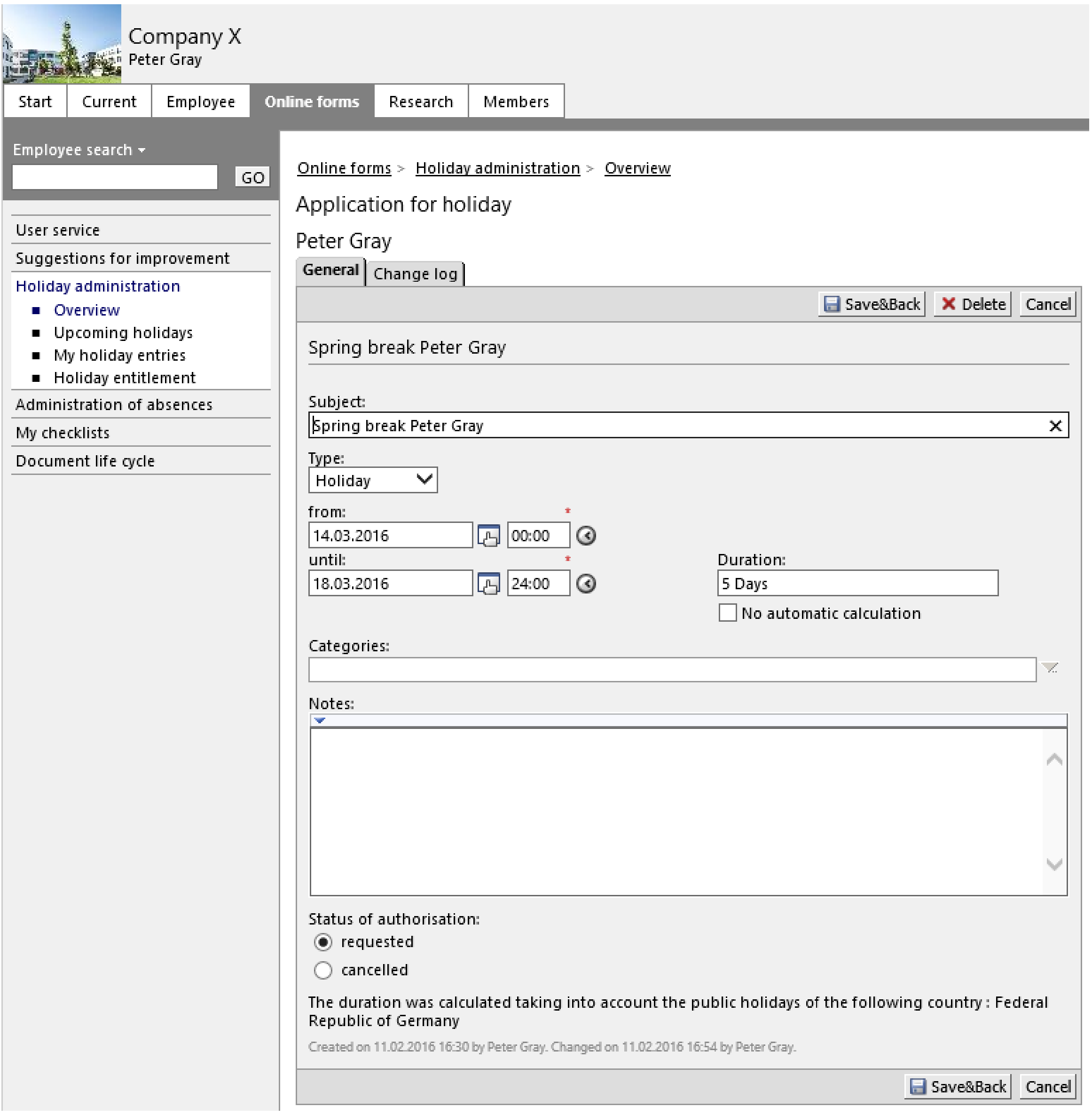
Activate the following settings in the lower pane of the window:

Request holiday

Cancel holiday

Read holiday entitlement

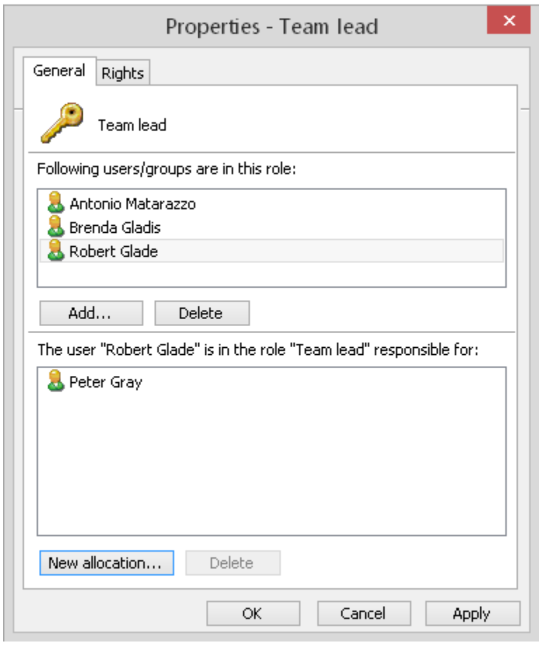
Each employee can request or cancel holiday for themselves and view their holiday entitlement in the portal.



To allow holidays and to enter holiday requests, more rights are necessary.

☑ Create a new role for these tasks and give it an appropriate name, for example, **team leader**.

☑ In the upper pane of the window, go to the **General** tab and select the users or groups for this role with **Add**.



☑ Select a user and/or group in the upper pane of the window. Click then **New assignment** in the lower pane of the window.

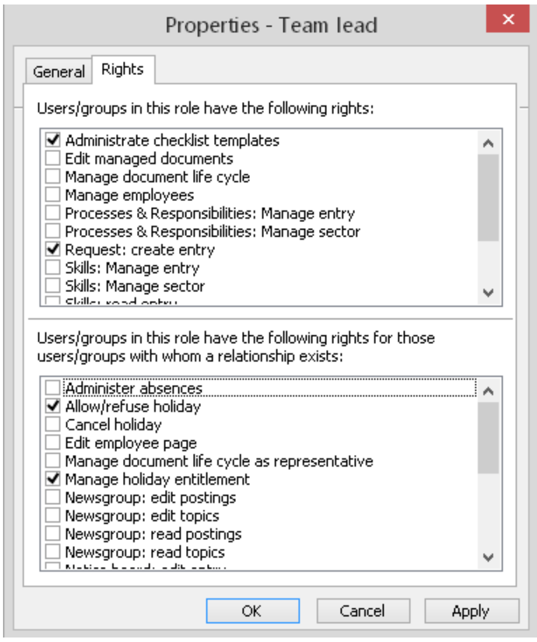
☑ Select the users or groups for which the team leader can allow or refuse holiday.

☑ Open the **Rights** tab of the window. Activate the following settings in the lower pane of the window:

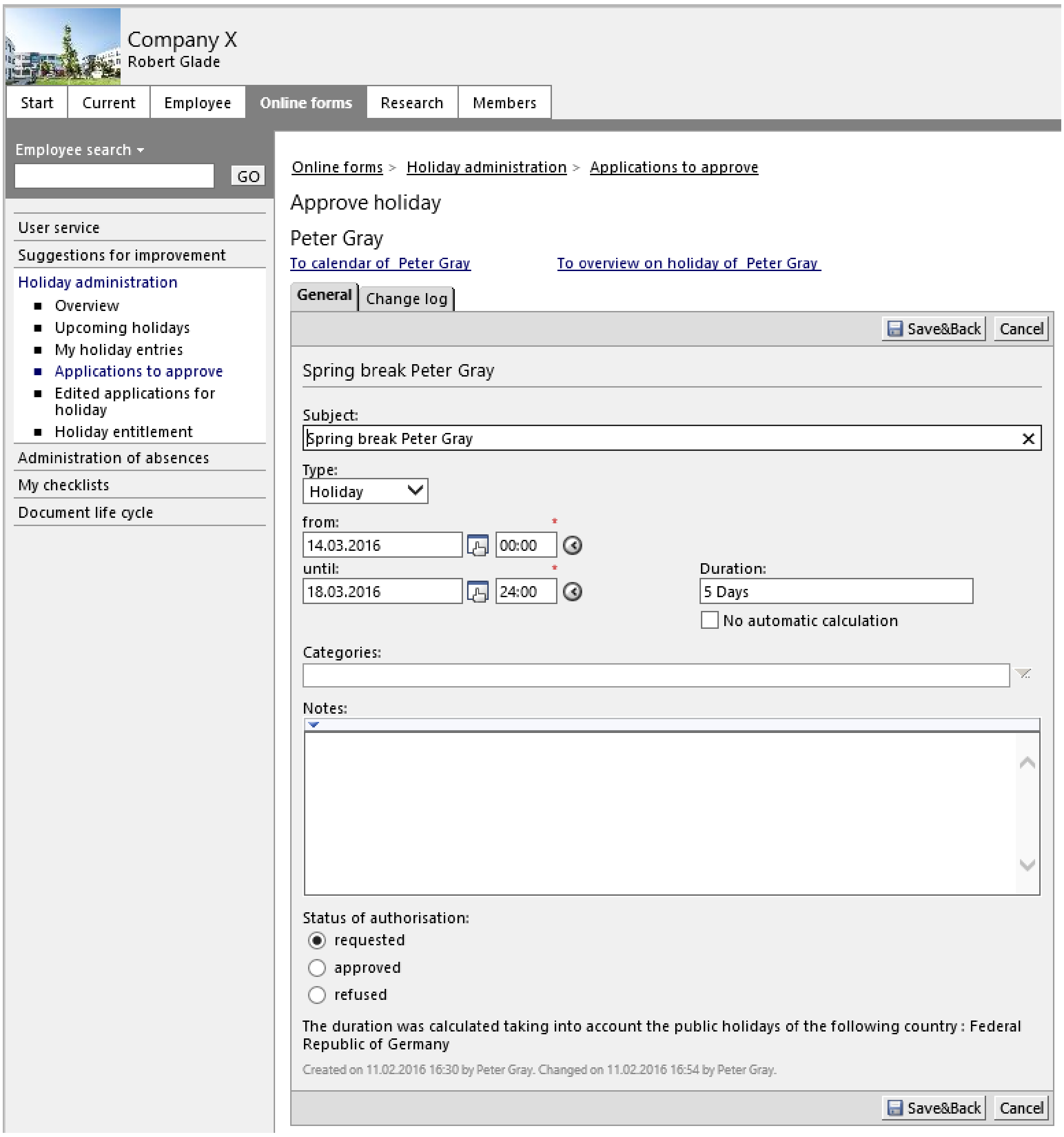
Allow/refuse holiday

Read holiday entitlement

Manage holiday entitlement



Team leaders view the corresponding options, for example, to allow or refuse a holiday, in the holiday form in the portal.



6.3.5 Rights and roles

Roles in teamWorks are based on rights:

- ☐ If a user has access rights to data record types or data records, but these rights have not been assigned to the role, then this user will not be able to access the relevant data.
- ☐ If a user has at least read-only access rights to a data record type, then this user will also have the rights that have been assigned to the role. And vice versa, if a user does

not have at least read-only access to a data record type, then he or she will not have the rights assigned to the role.

Users can, for example, create entries in the notice board even if they have only read rights to documents. Or a user can allow holidays although he or she only has read rights to this data record type.

- There are two exceptions to these rules:

  The corresponding role's **Administer employee** or **Edit employee data** rights are only used for displaying links to the employee page.

  For addresses, however, the predefined rights still apply to this data record type.

- To include documents in the document life cycle, a user will need at least **Insert** rights to documents. You will then only be able to edit document metadata in the document life cycle if you have Edit rights to the Document data record type. This is the minimum requirement. Your company's quality assurance officer will usually have full access rights to documents.

- If a user has rights from a role, then the system no longer checks in the **User Management** area of the Management Console to see whether the user has restricted rights to columns. Generally, rights from roles are the stronger rights.

  This prevents the following conflict: a user has full rights to a particular data record type, but has only read-only access rights to column X. He or she has also been assigned a role with edit rights to column X. Because role rights are stronger than normal rights, he or she can then edit this column.

6.4 Employee data records in teamWorks

teamWorks employee data records are used in the portal, for example, on a page for each employee, in a phone list or in an employee picture gallery. The corresponding pages are maintained in the **Employee management** component.

An employee data record is a connection between an individual contact or a contact person and a user and/or a user account in CAS genesisWorld.

You can find additional information in the online help pages for users on the **Employee data records** page.

The connection between one or several addresses with a user account can be made in the CAS genesisWorld Desktop client.

You can find additional information in the online help pages for users on the **Employee data records** page.

This link can also be created in the teamWorks portal by the administrator.

Employee data records can be created in the Management Console by creating individual contacts from user accounts. This is only possible with the teamWorks module.

With teamWorks, addresses can be imported as employee data records in the Management Console or the Desktop client with the import/export wizard.

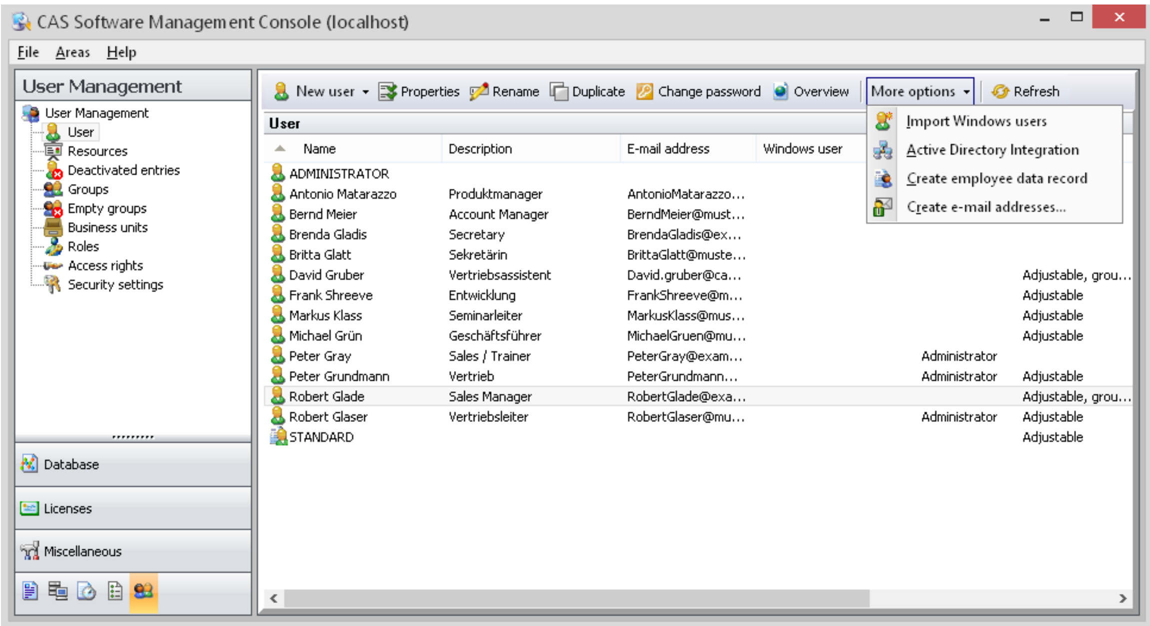
You can find additional information in the online help pages for users and in the online help pages of the Management Console on the **Import/Export - Source/Target: Text file** page.

The **Employee management** component pages can only be used for addresses which were transformed into employee data records. If you want to use other address types on certain pages or in forms, you must use a different component.

6.4.1 Creating employee data records from user accounts

In the **User** folder of the **User management** area, individual contacts for user accounts, which are not linked to an address yet, can be created.

Go to the toolbar and click **More options** and then **Create employee record**.



The following window displays the users for whom no link, that is, no employ data record, exists.

☑ Select the desired users and click on the **Create employee data record** button.

Individual data records are created for the selected user accounts. Name and e-mail address of the users are adopted.

The **Employee** data tab is now displayed in the corresponding Desktop client address; this tab displays the assigned user and user data can also be changed in this tab.

Please note that may be created with the **Create employee data record** function of the Management Console if addresses were already created for employees. In this case we recommend to use the **Display/hide employee data** function in the Desktop client.

With the **Create employee data record** function, one individual contact or employee data record per user can be created in the Management Console.

In the Desktop client and also in the teamWorks portal, two or more employee data records can be assigned to one user account.

6.4.2 Portal: Employee data record - linking address and user

The following functions are only available in the portal if you are logged on as administrator.

An employee data record is an address in CAS genesisWorld and can either be an individual contact or the contact person of a company.

If several users are to work with the same CAS genesisWorld user account, two or more employee data records and/or addresses can be assigned to one single user account.

The administrator can assign one or several addresses to user accounts generating employee data records in the CAS genesisWorld Desktop client and in the teamWorks portal.

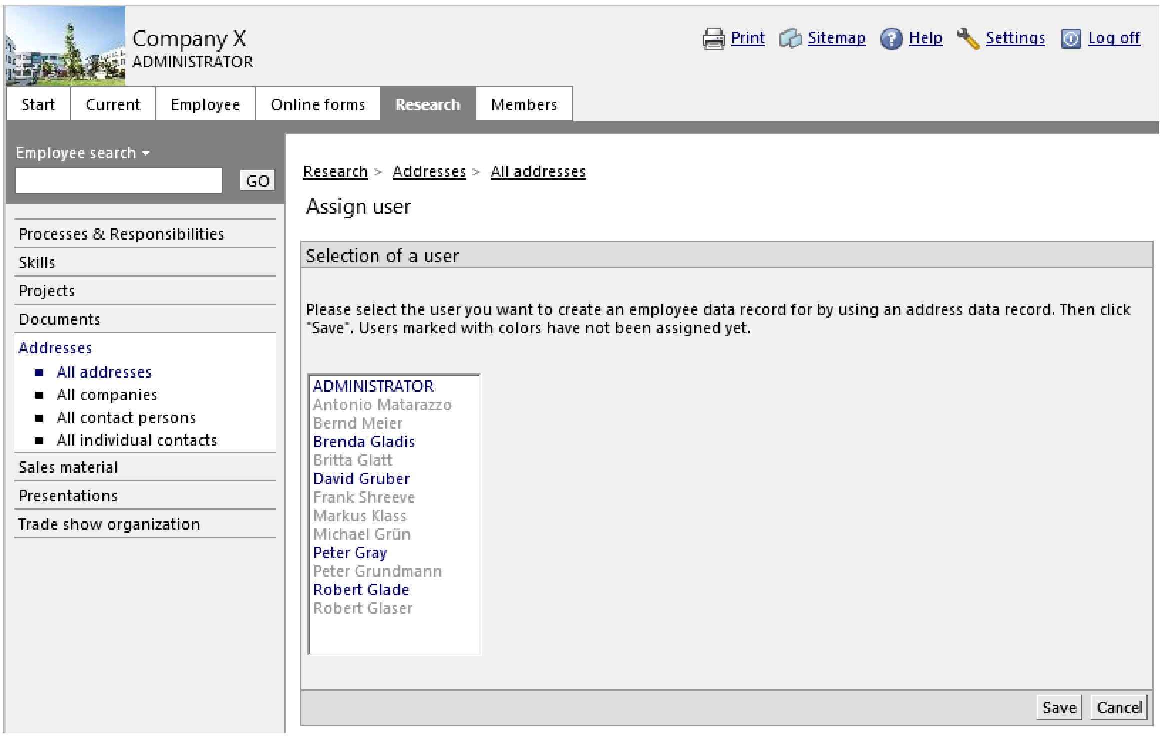
This means that each employee can have his or her own employee page and all these colleagues will then have a separate entry in an employee or phone list.

More data can be added to this employee page in the portal, for example, a picture or the department an employee works for.

Creating employee data records from an address

- ☑ Open the address of an individual contact or a contact person in the portal.
- ☑ With **Create employee data record**, you open the **Assign user** form showing all users. Users who have not been assigned to an employee data record are highlighted.

  The address can also be assigned to a user to whom an address was already assigned.



☑ Select a user from the list and then click **Save**.

The detail view for the employee data record opens automatically.

☑ Click **Select data record** if you want to add missing data.

The **Create employee data record** link is only shown if no employee data record was generated for the address.

Assigning a user on the employee page

☑ Open an employee page

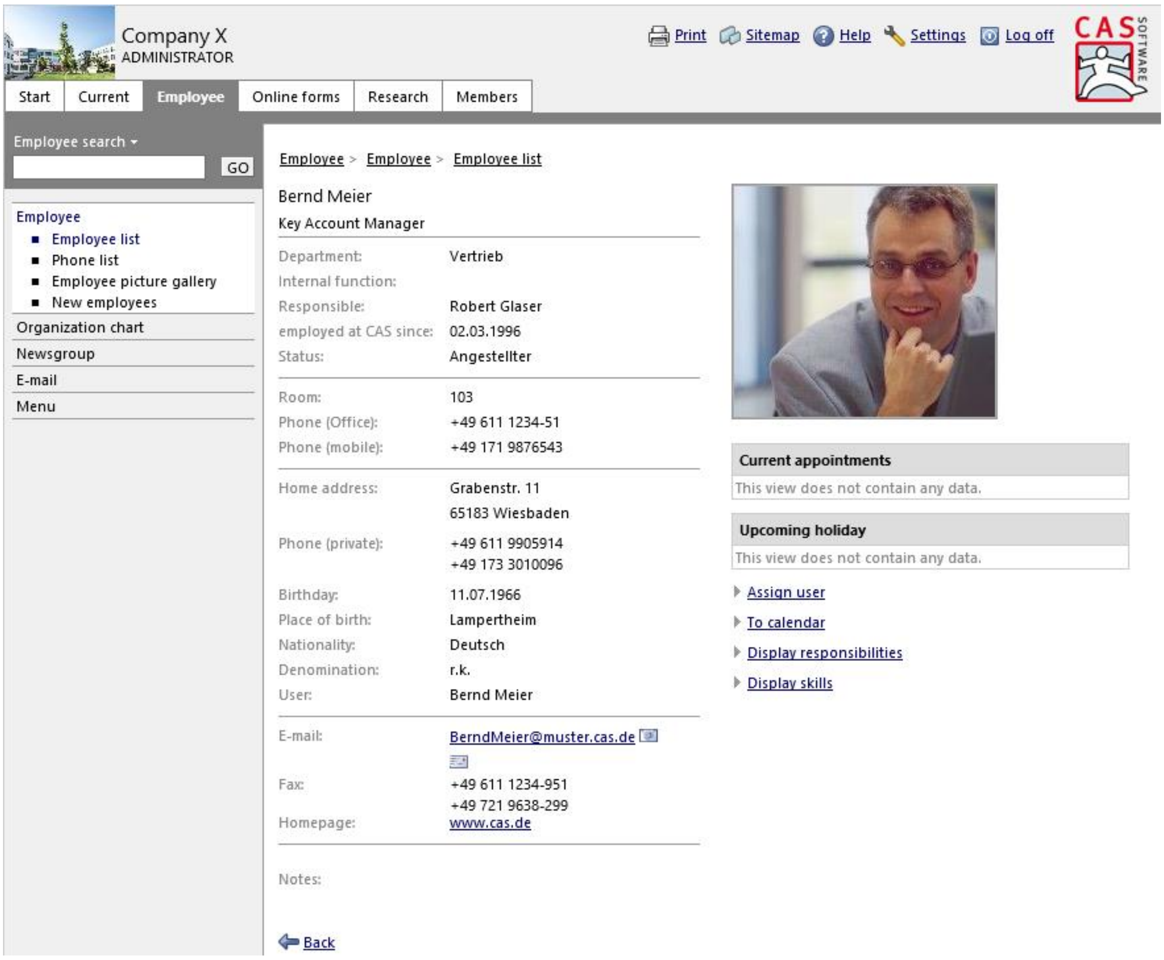
☑ Click **Assign user**. The corresponding window opens.

If a user is already assigned to a user account, they will be informed.

☑ Select a user from the list and then click **Save&Back**.

☑ Open then another employee page and select the same user account with **Assign user**.

You have then assigned the same address, that is, the same employee data record to several employees.

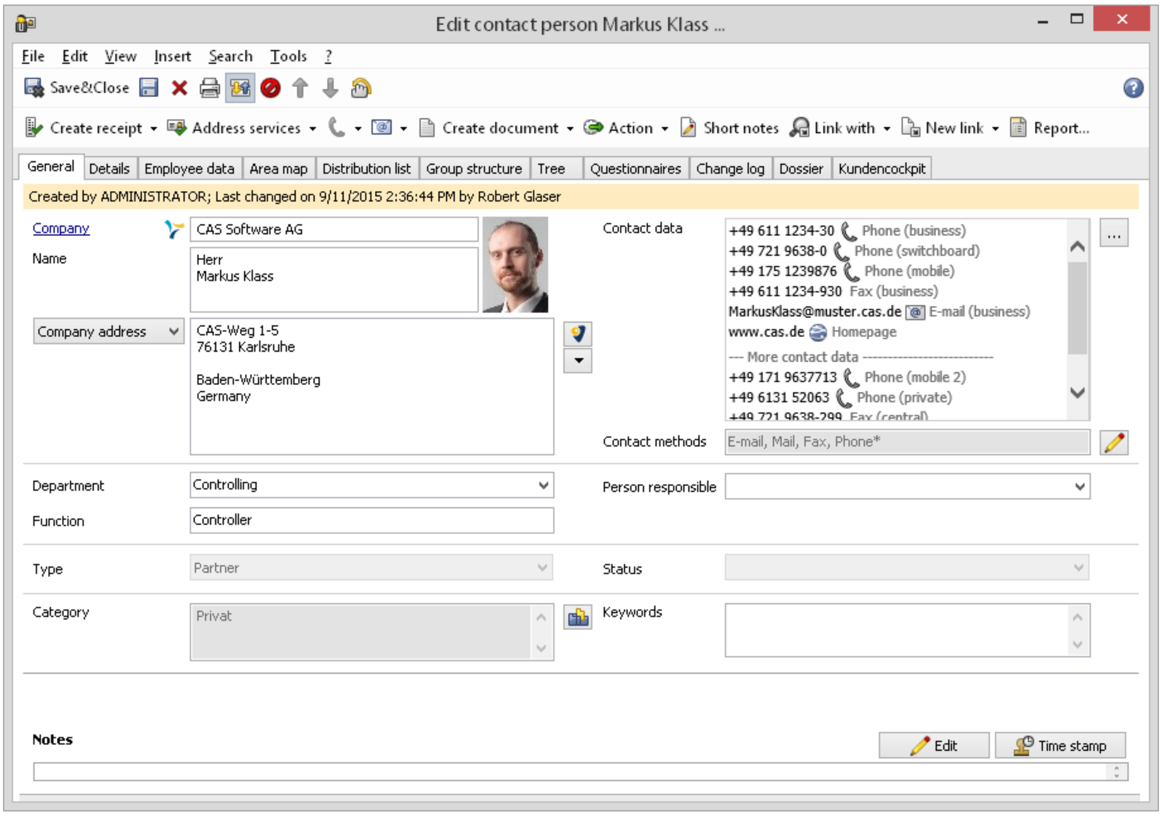


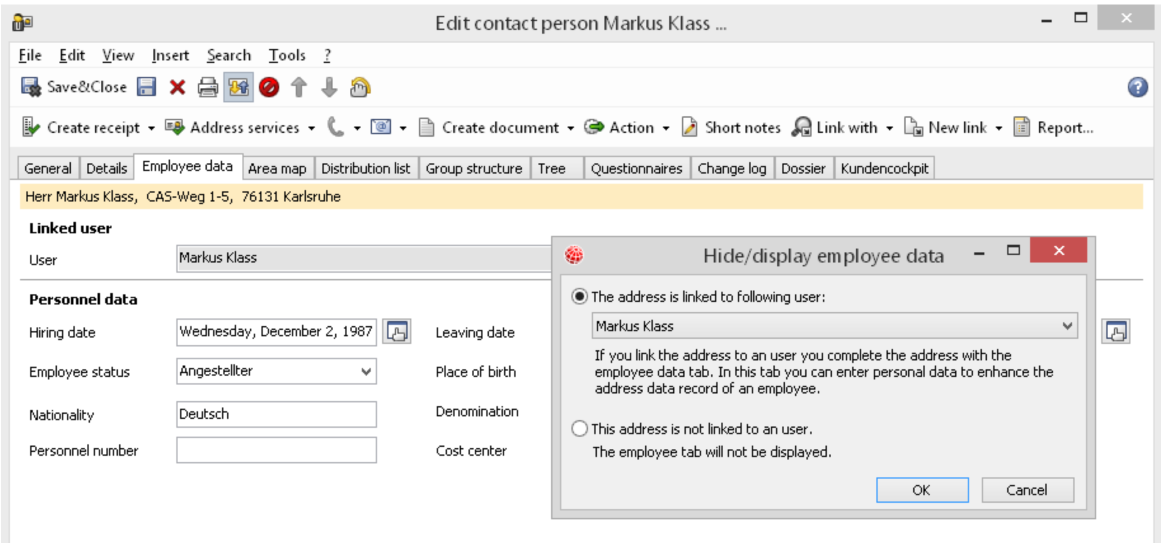
The **Assign user** link on an employee page is always displayed for the administrator.

6.4.3 Employee data record of an address

The employee data record in the Desktop client is the address for this employee who has a link to a user account.

This connection can also be entered or changed in the **Tools** menu of the address with the **Hide/display employee data** function.





7 Examples for components

The following examples show different scenarios of how to apply teamWorks. The described components can be deployed without much effort.

7.1 Requests

You can use requests, for example, to organize internal processes such as material order or business trips. Example components already exist.

Tasks data record types are the base of a request. You can assign specific rights and/or roles:

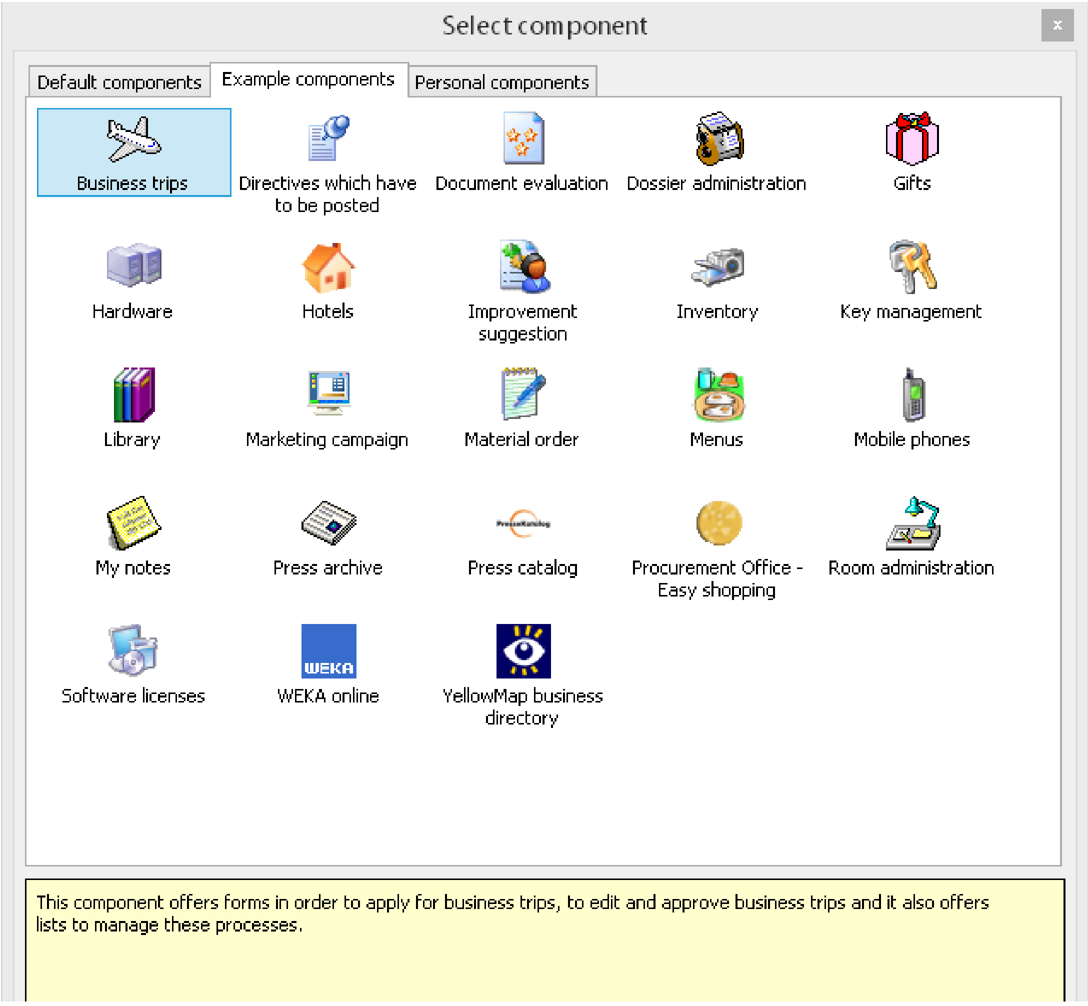
☐ Specific users can submit a request, and other users can administer or approve requests.

☐ By sending short messages in the portal or notifications with the notification service via e-mail, responsible users are automatically informed about existing tasks.

Additionally, shares in the portal allow that a specific component for a request is only displayed for specific users. The buttons to administer or approve a request are automatically displayed depending on the rights of the role.

☑ In the **Portal management** area of the Management Console, click **New component**.

☑ In the opened window, you open the **Example components** tab and click **Business trips**.

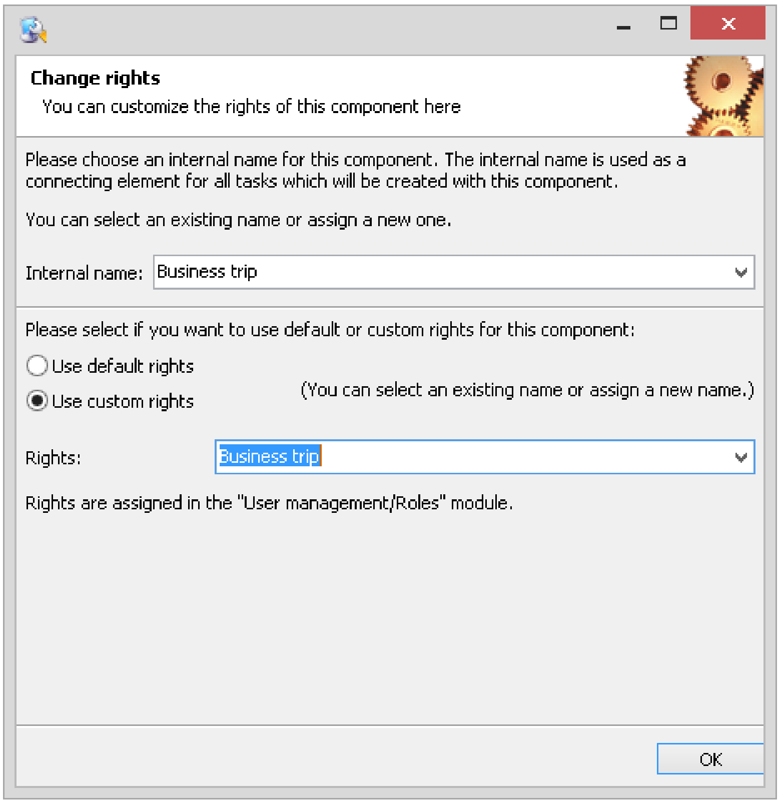


☑ In the next window, enter a name or accept the suggestion for **Internal name**.

☑ Activate the **Use custom rights** option and assign **Rights**, for example, **Business trip**.

In doing so, you have created special rights that you can then assign to specific users using the role system.

If you use **Default rights**, the common rights apply to tasks in CAS genesisWorld. Access options for users are then based on the corresponding owner and external access rights for a task.

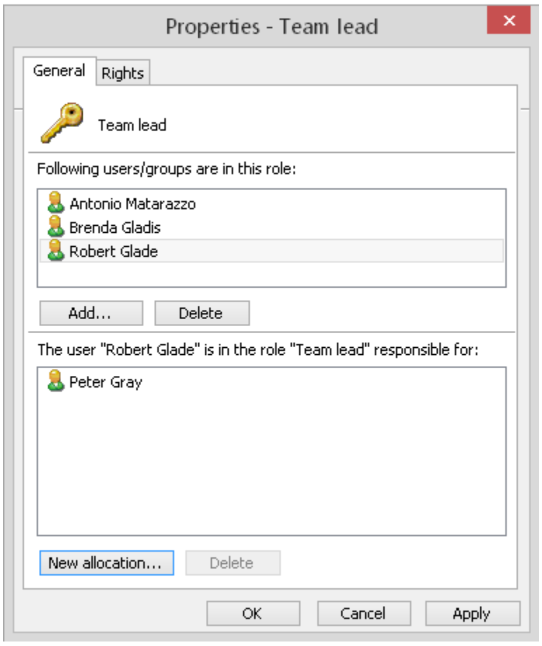


☑ Change to the **User management** area and the **Roles** entry.

☑ Create a new role or open a certain role, for example, **Team leader**.

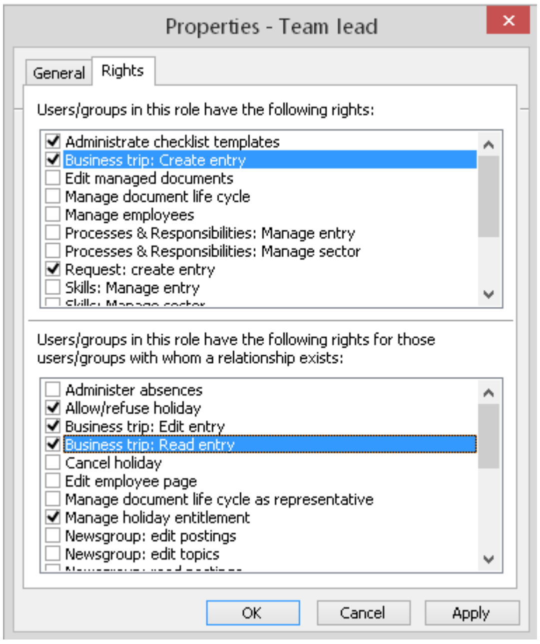
☑ In the **Properties** window, you define in the upper pane of the **General** tab which users you want to assign the **Team leader** role.

☑ In the lower pane of the window, you define for which users a selected team leader from the upper pane is responsible.



☑ In the **Rights** tab, you define, in the upper pane, for the **Team leader** role the rights that apply to this user.

☑ In the lower pane of the tab, you define the rights of the team leader with regard to the users for whom this team leader is responsible.

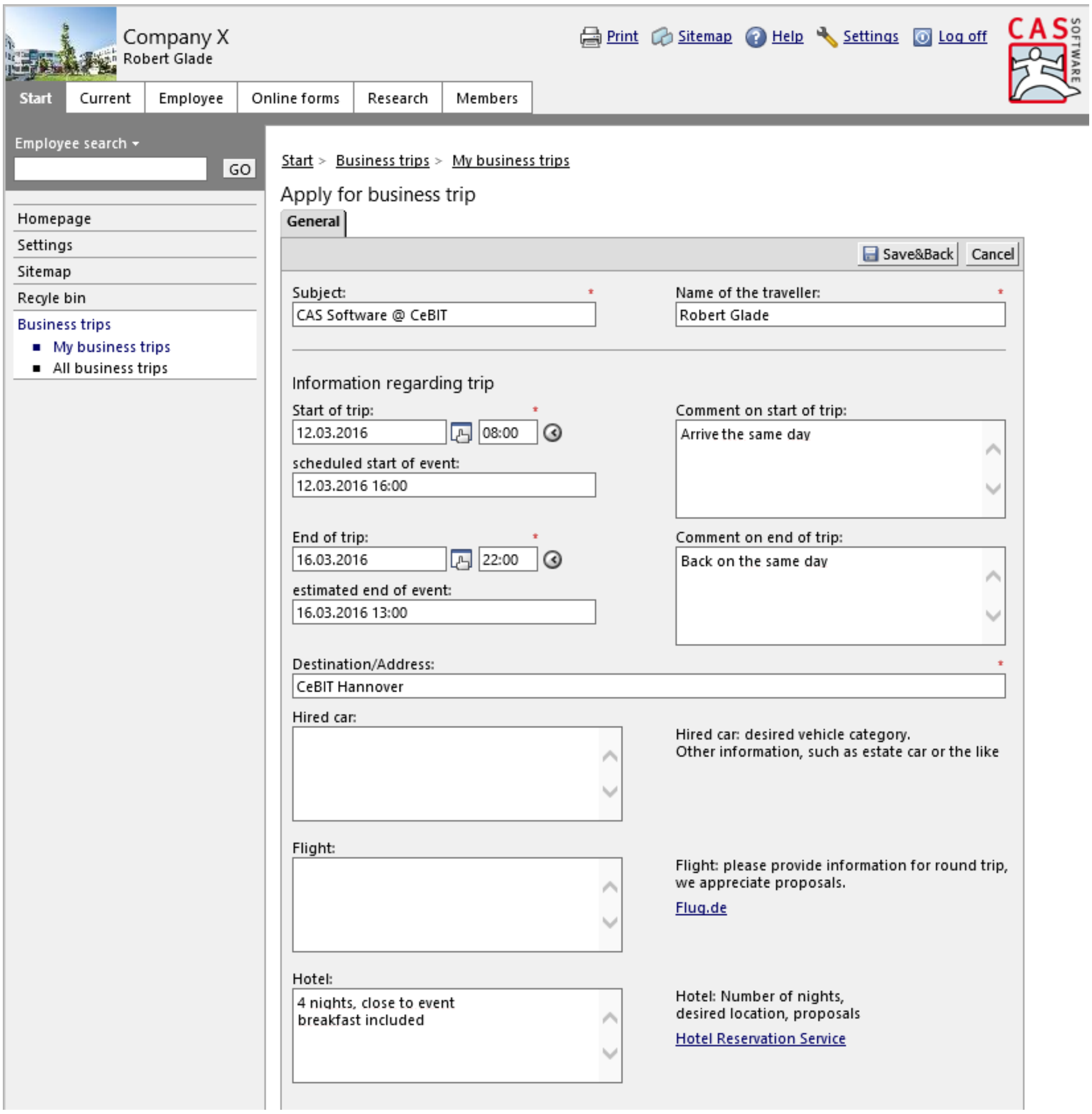


☑ To enable all employees to submit requests for business trips, you open the **Properties > One for one** window.

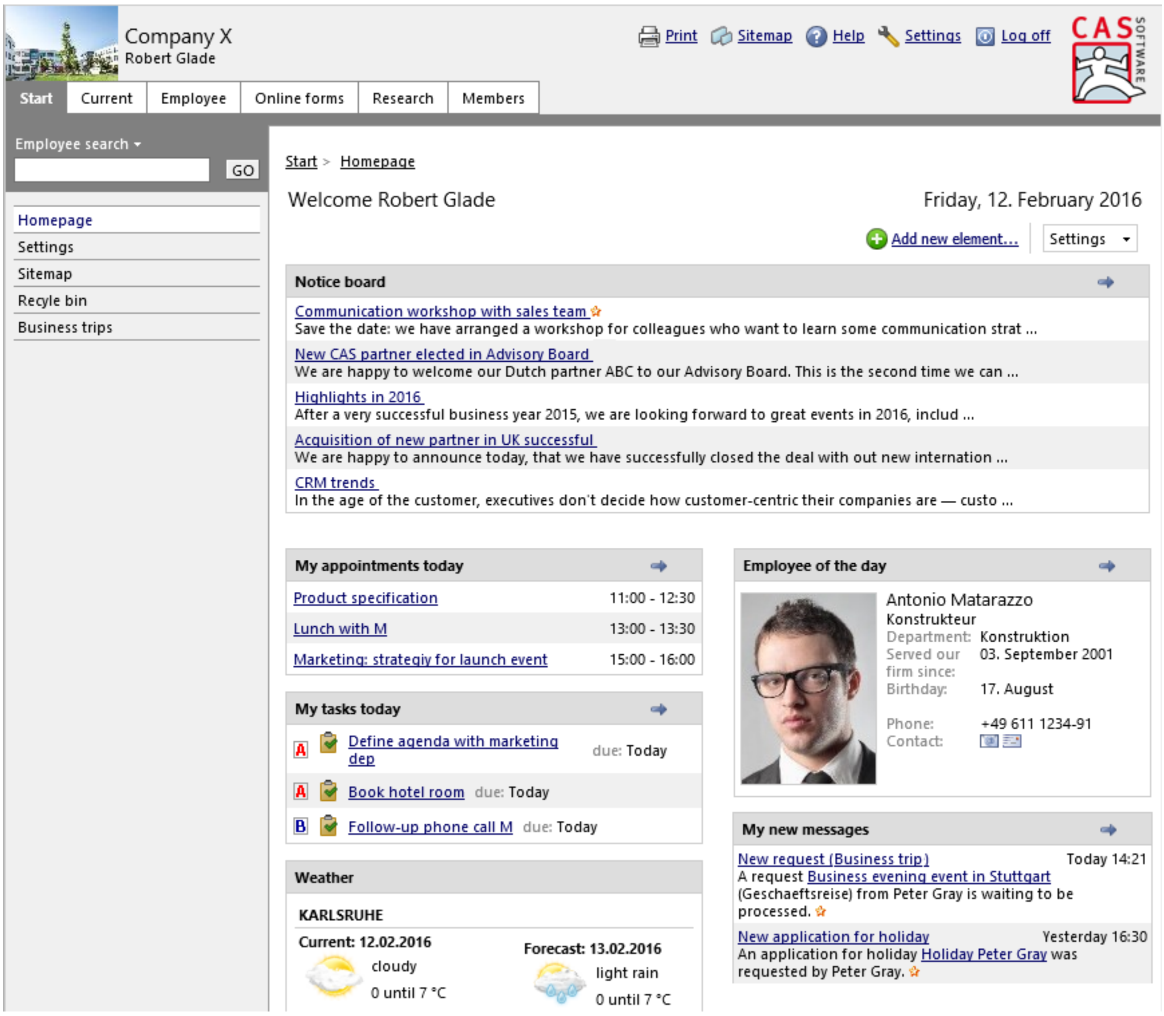
☑ Go to the upper pane of the **Rights** tab and activate **Business trip: Create entry**.

☑ In the lower pane of the tab, activate **Business trip: Read entry**.

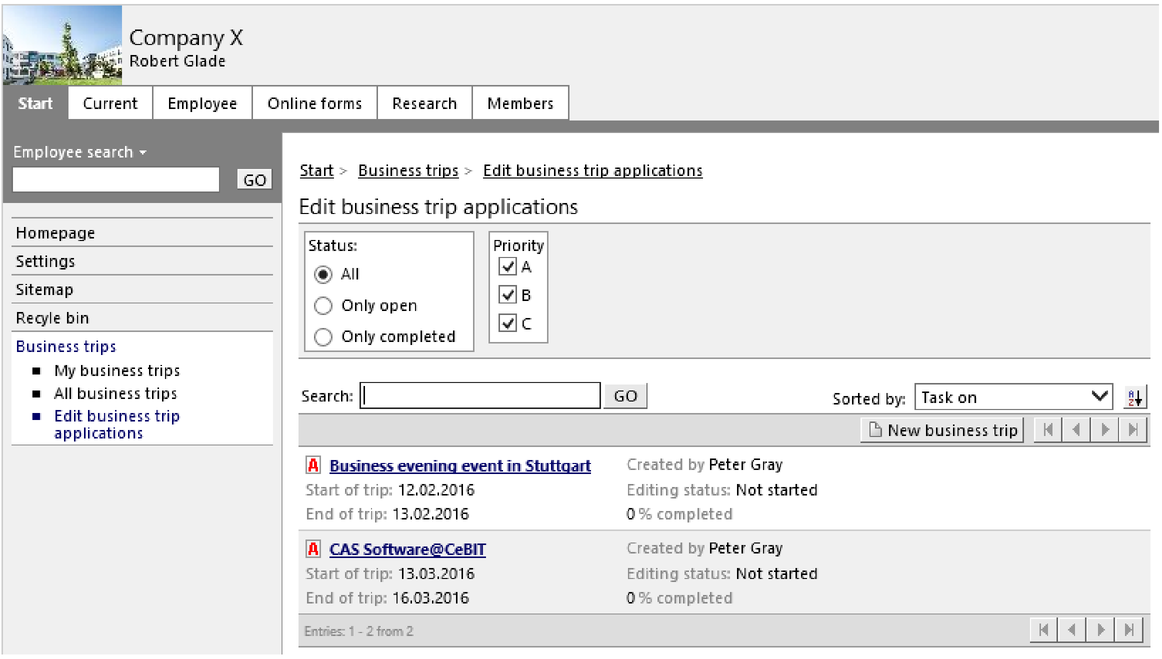
Each employee can now request a business trip.



The responsible team leader receives an automatic notification, depending on their portal settings, either in the portal or as an additional e-mail.



The responsible team leader has rights and the corresponding lists to edit requests for business trips.

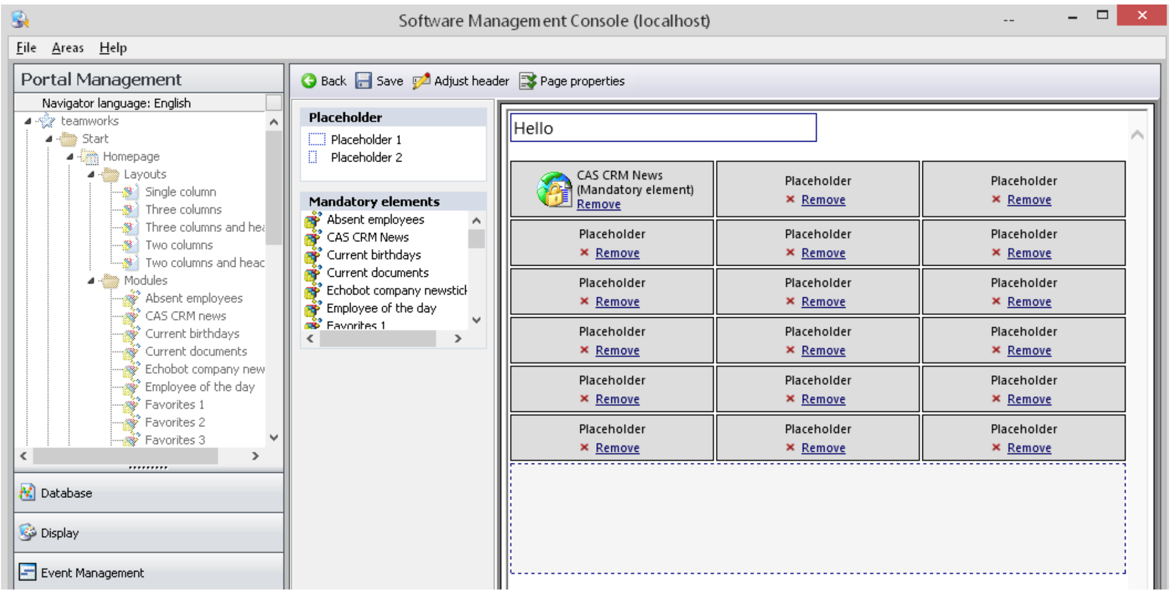


7.2 Start page

The start page as first page in the portal offers an overview about the current day.

☑ You as administrator can create the **Start page** component in the **Portal management** area in the Management Console.

Users can select different layouts in the portal: **Three columns**, **Three columns and header**, and so on.



A predefined element can be helpful to display, for example, company news to inform all employees of important news.

☑ To do so, you open the page with the respective layout and insert the element in each page.

☑ For company news, you can, for example, enter a **Notice board** in any folder of the portal.

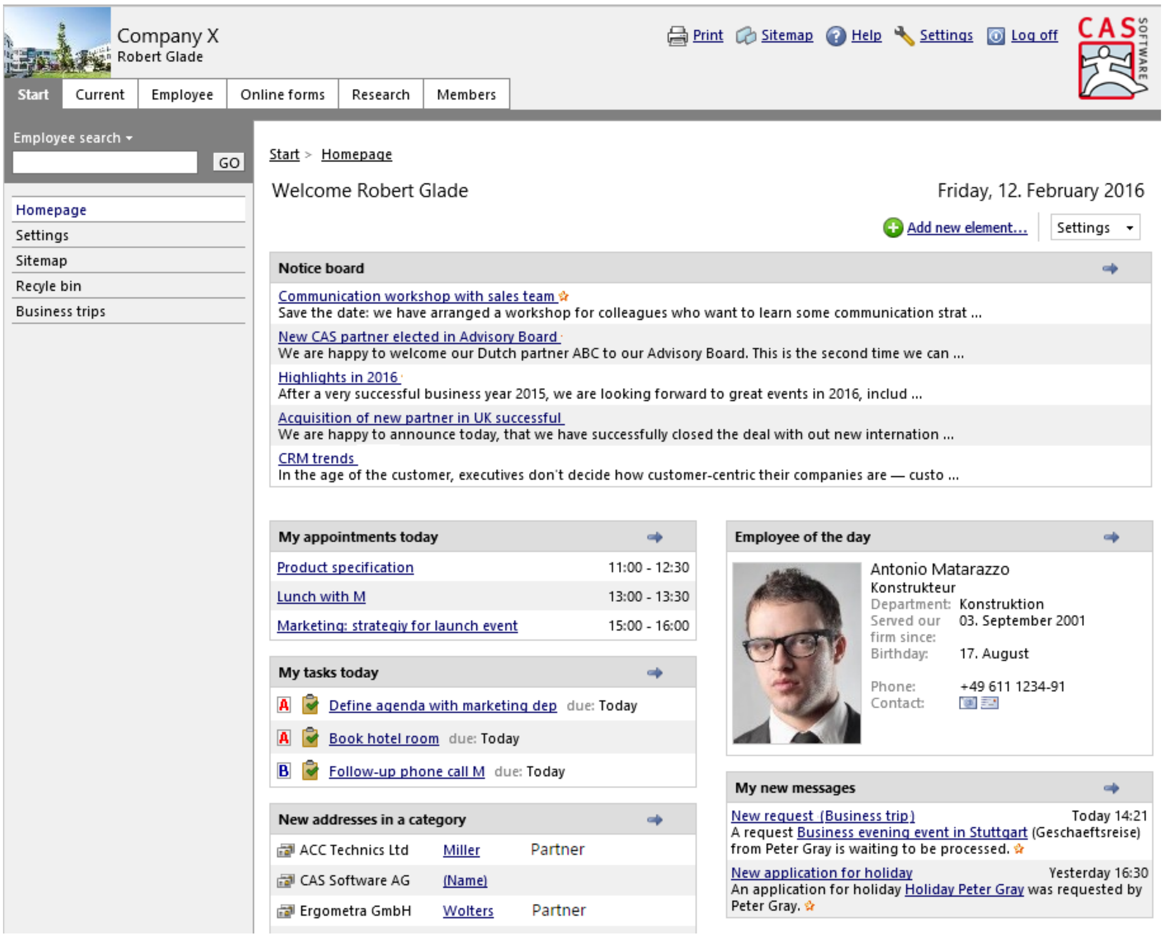
☑ For a Notice board, you assign a name at **Internal name** and activate **Use custom rights**, just like you do for a request.

☑ By assigning rights for the role only to certain users, all persons can read the entries on the start page or in the company news on the **Notice board** pages.

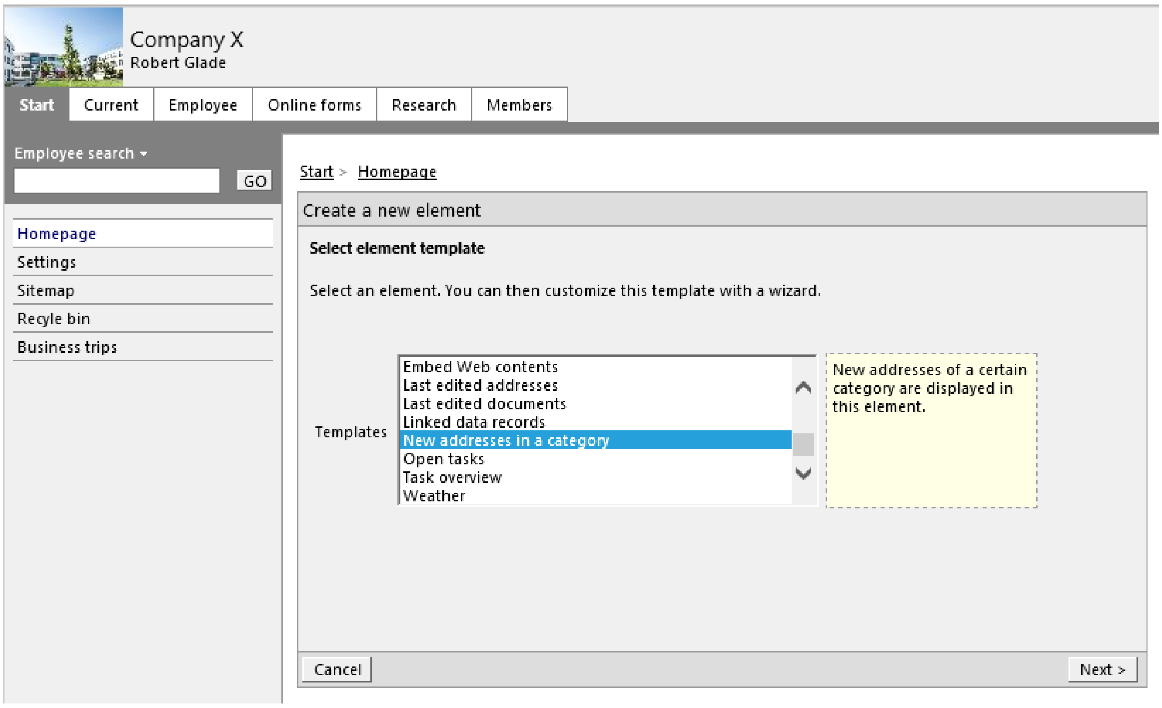
Only users with special rights can enter entries in the company news.

You can create more predefined elements, for example, company appointments within the next 4 weeks, a collection of hyperlinks as favorites for important forms in the portal or in the Internet, and so on.

☑ In the portal, users select a layout via the **Settings** drop-down list, **Customize personal start page**.



☑ On the next page, users can individually select their elements or create an element with templates.

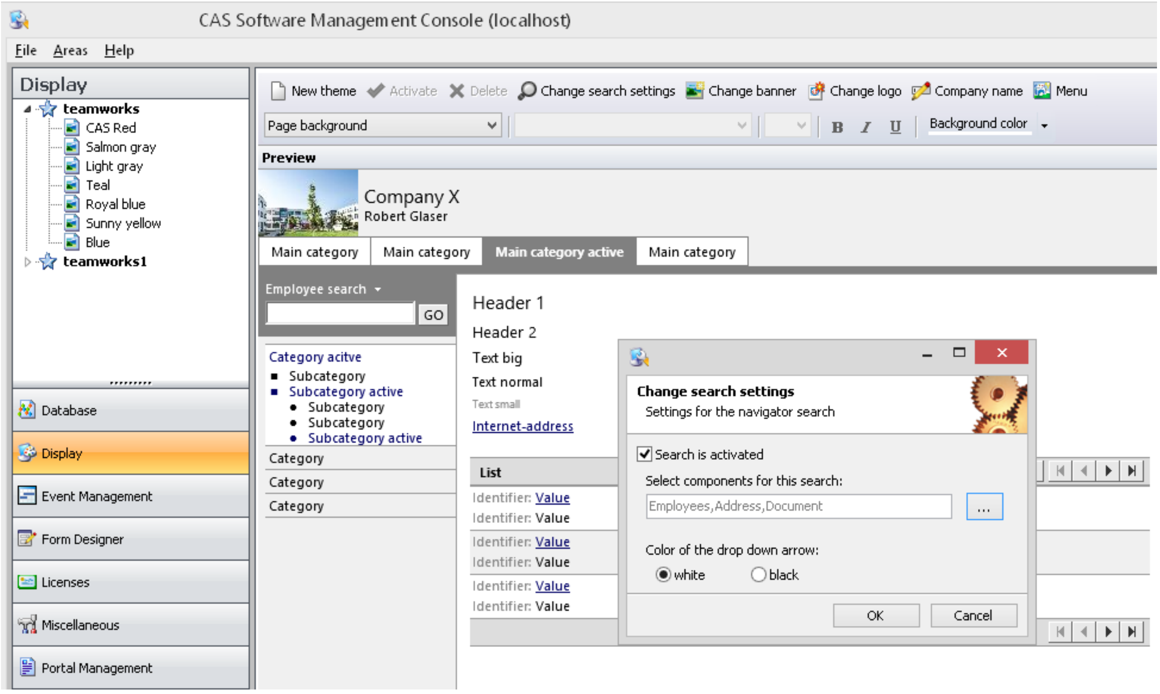


7.3 Keeping employees informed

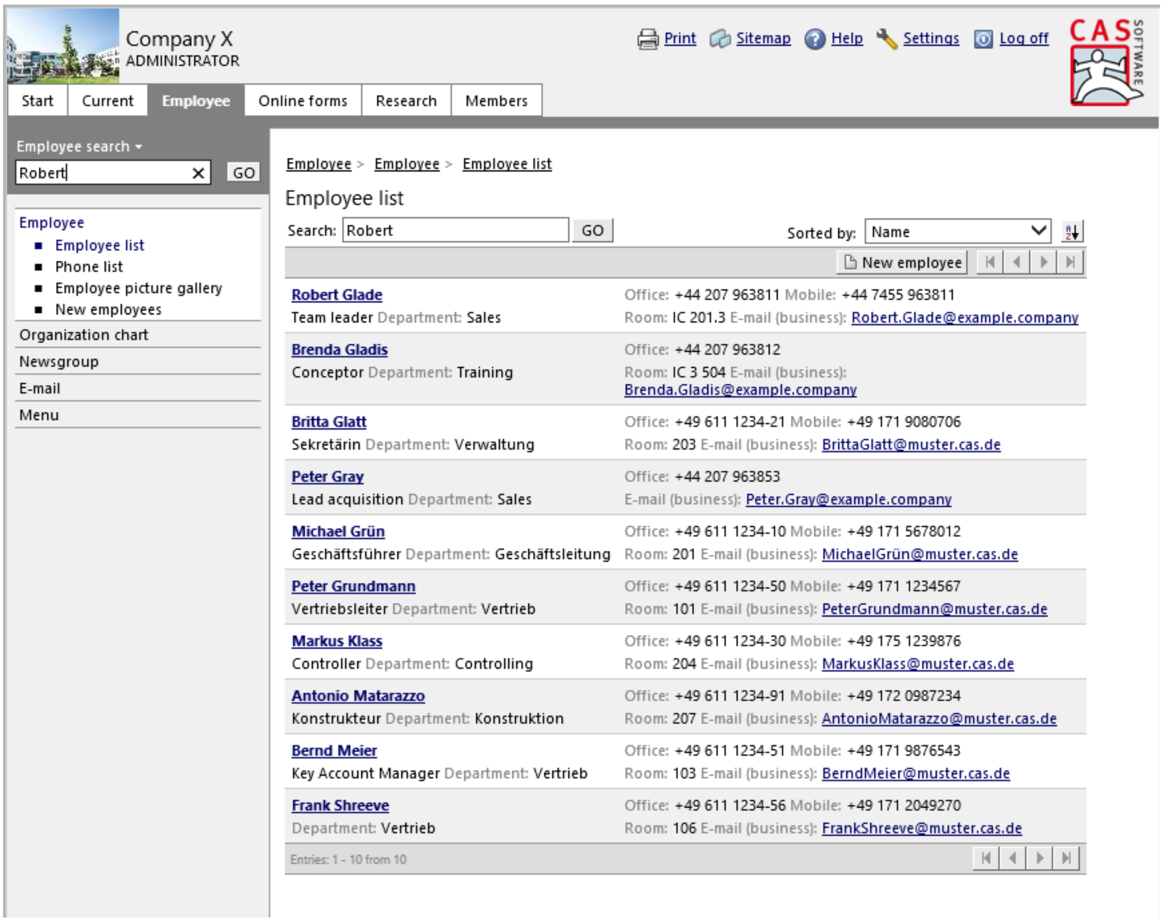
Who has which phone number or e-mail address, who sits where, who is in an appointment or on holiday?

☑ The **Employee management** component offers already existing lists and necessary forms.

☑ As administrator, you define the employee search in the portal navigator in the **Display** area of the Management Console with the **Change search settings** option.



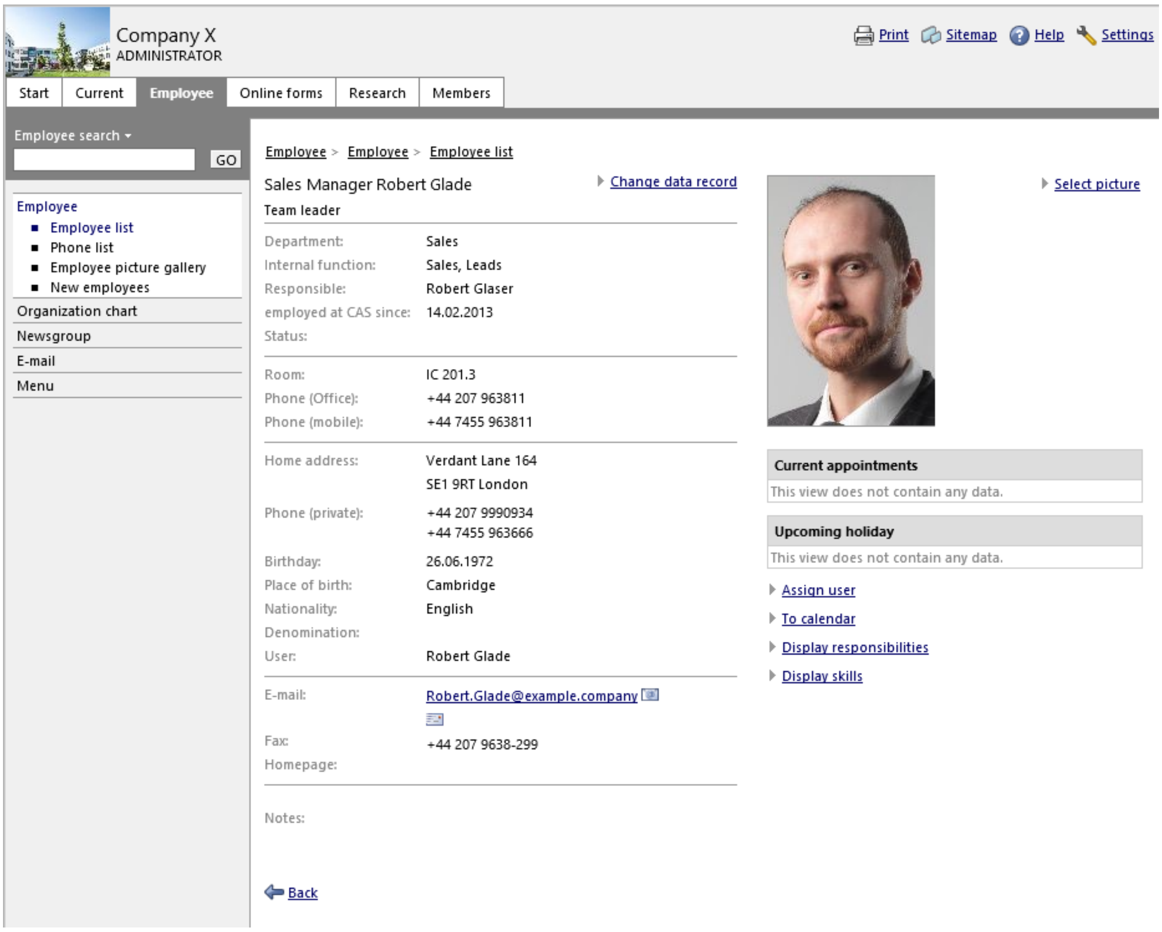
☑ In the portal, users can, for example, also search other data records such as documents with the **Employee search** if you as administrator have selected several components in the **Change search settings** window.



☑ In the portal, if you find several hits for a name when using the **Employee search**, the **Employee list** opens.

If you find a colleague with the **Employee search**, the page for this employee opens immediately.

Each employee can edit the displayed data and the picture with **Change data record** and **Change link** if he or she has the corresponding rights. These links are only displayed for the user or employee who is logged on to teamWorks.



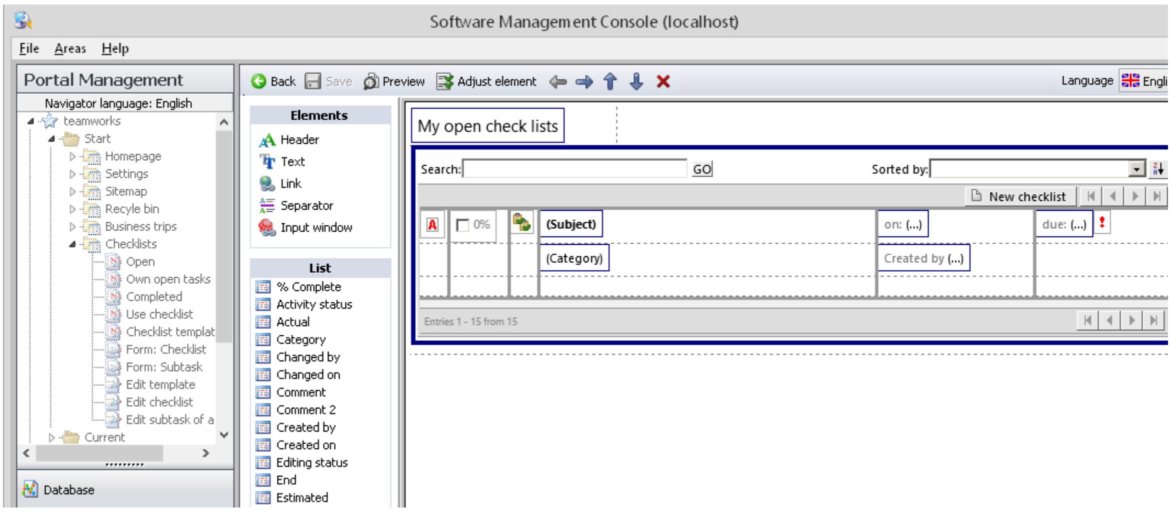
7.4 Checklists

Checklists as workflows or process descriptions in teamWorks are displayed as one main task with a number of subtasks assigned to this task.

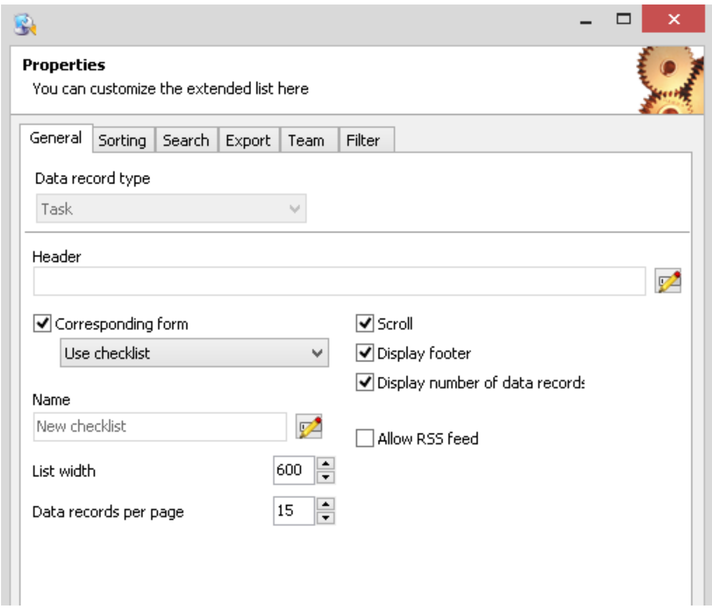
☑ In the **Portal management** area of the Management Console, click **New component** and then **Checklists**.

The component contains all necessary lists and forms.

☑ If you, for example, mark a list and open it with **Edit page**, you can adapt headers, texts and fields.



☑ Clicking **Adjust element** opens the properties window for a list.



A checklist consists of a main task and a number of subtasks. Users can create the checklist, that is, the main task and the subtasks.

☑ Users view all checklists which they or their colleagues have created in the portal.

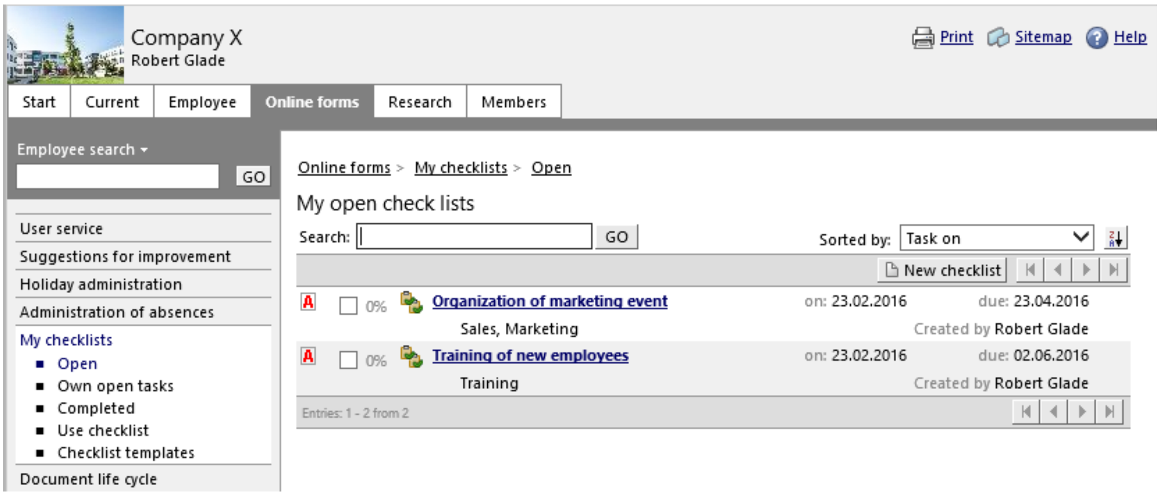
☑ Checklists comprise tasks, this means that the corresponding participants must be entered when creating the tasks.

☑ With the **Checklist template** list, checklists are newly created or changed.

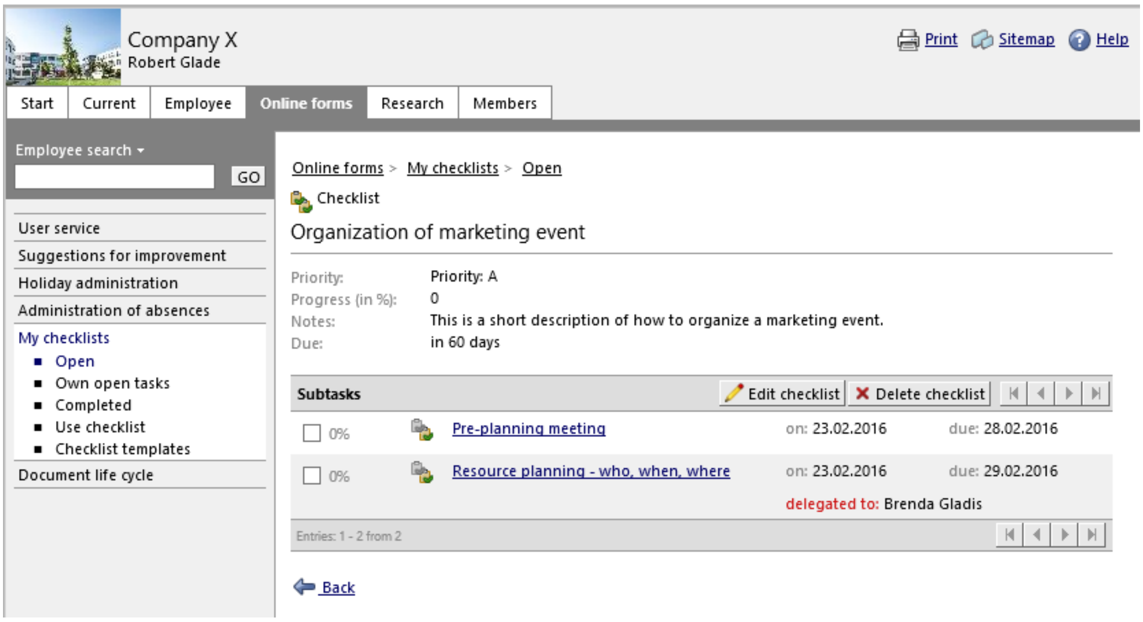
☑ Buttons in the **Checklist template** list help you to change the main task, add or remove subtasks, or add participants to the task.

☑ With the **Use checklist** list, an existing checklist is used: the main task and the subtasks are created.

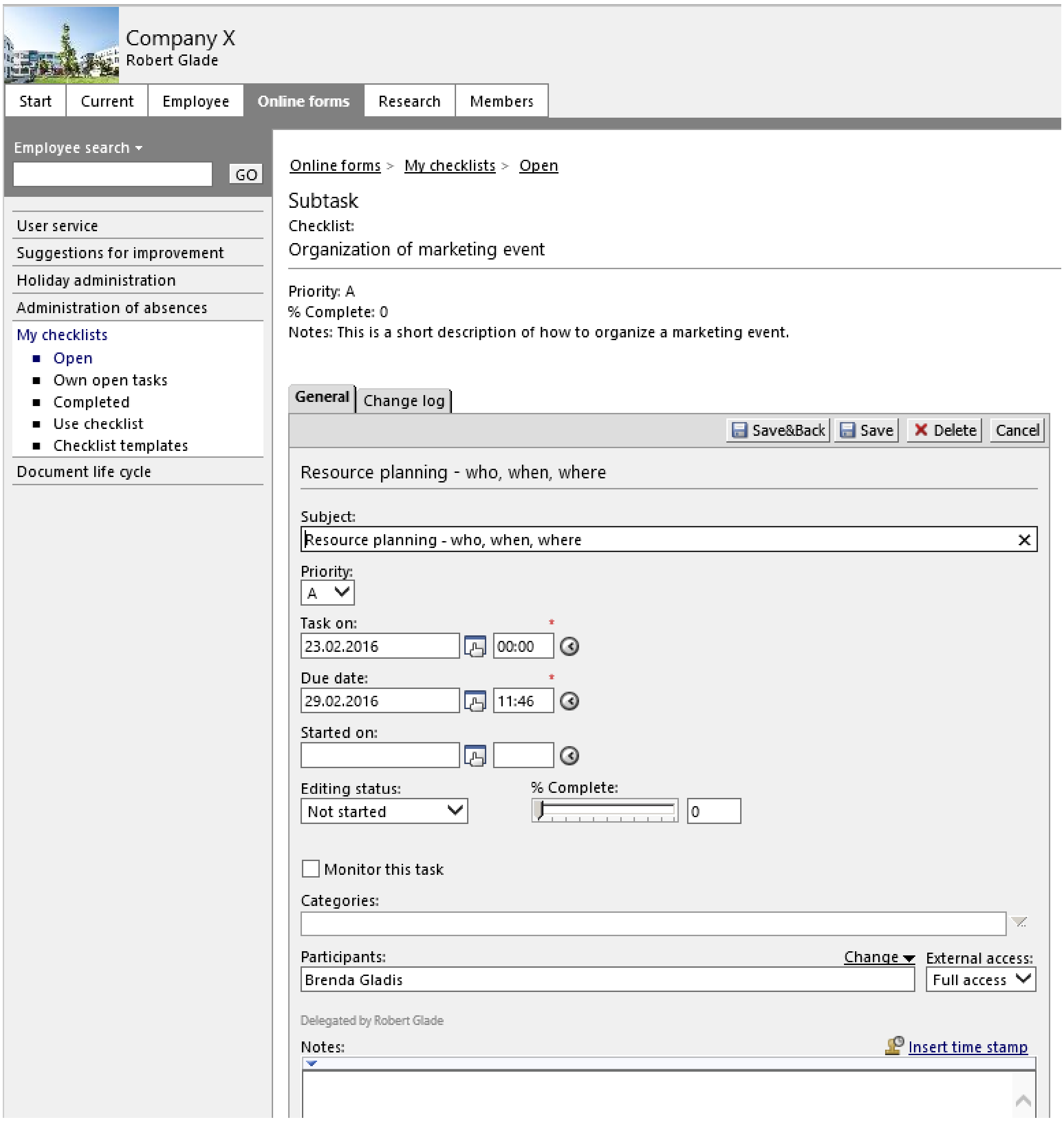
This creates a working task which is then displayed in the **Open** list.



☑ Opening an open checklist displays the main task and the corresponding subtasks. Planned or already processes subtasks and the progress for the main task are displayed.



☑ Tasks are delegated by entering participants.


Company X
Robert Glade
Start
Current
Employee
Online forms
Research
Members
Employee search
GO
User service
Suggestions for improvement
Holiday administration
Administration of absences
My checklists
Open
Own open tasks
Completed
Use checklist
Checklist templates
Document life cycle
Online forms > My checklists > Open
Subtask
Checklist:
Organization of marketing event
Priority: A
% Complete: 0
Notes: This is a short description of how to organize a marketing event.
General
Change log
Save&Back
Save
Delete
Cancel
Resource planning - who, when, where
Subject:
Resource planning - who, when, where
Priority:
A
Task on:
23.02.2016
00:00
Due date:
29.02.2016
11:46
Started on:
Editing status:
Not started
% Complete:
0
Monitor this task
Categories:
Participants:
Change
External access:
Brenda Gladis
Full access
Delegated by Robert Glade
Notes:
Insert time stamp