ONESERVE
Subcontractor Access

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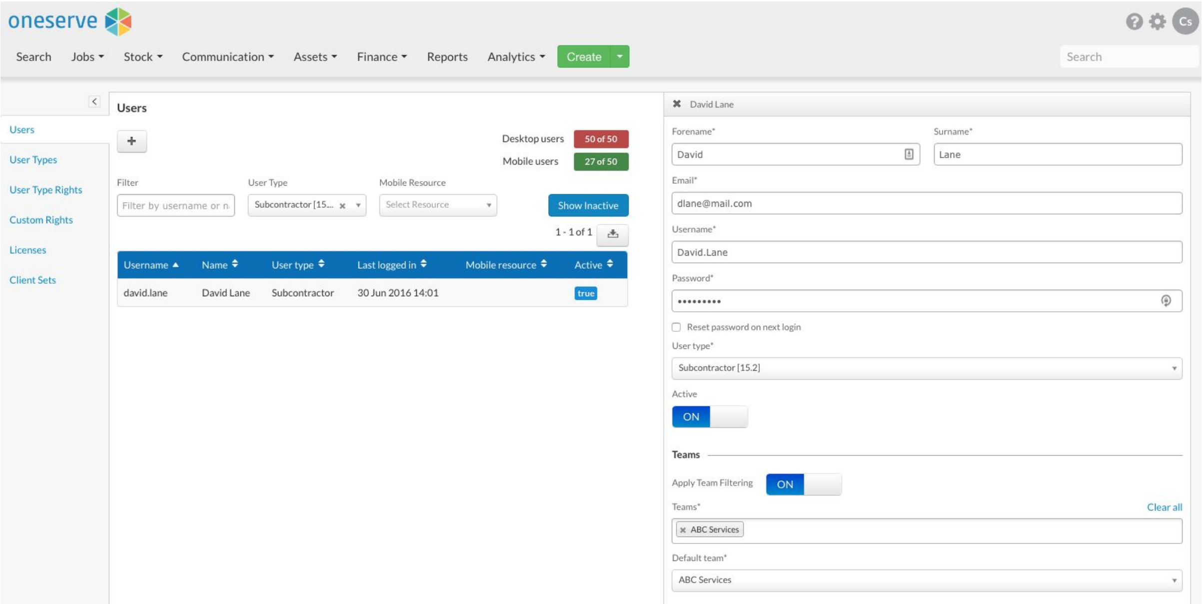
The subcontractor access settings detailed in this document will be relevant if you have a single or multiple subcontractor working on a job. As the filtering of jobs is performed on a Job Team and Job Activity level you will be able to ensure your users only access the information relevant to their assigned teams.

Users Page
Team filtering is set at the user account level, when you turn on ‘Apply Team Filtering’ you will have the option to assign the teams the user can access.



Pages that use the team filtering

- Job Search
- Global Quick Search
- Calendar View
- Scheduler
- Fixed and Pooled Scheduling
- Job Resources: Appointments/Time entries
- Job Costs: Existing entries and adding costs manually
- Job Activities: Existing entries and assigning new activities
- Modify Team/Service against a job
- Admin: Teams

Jobs

Job Versioning
To allow users to modify job costs, activities and job details the users require access to create and submit job versions.

Reasign Team/Service
The job needs to be at a job status within the Pending or In Progress Group and on a new version (If versioning is active). The reassign page will filter the available teams depending on the User-Team relationship, the team must be able to cover the service and the postcode for the site on the job.

Job Resource

- Will only show appointments allocated to the teams assigned to the logged in user
- Option to create and reschedule appointments
- The Time section will be displayed on the Resource tab, entries will be filtered using the User-Team relationship.

The option to add time manually will be available, users can add time for different Resources and Services but they will only be able to access the Team assigned to their user account. If this section is not required removed the user type right called 'Time Addition/Modification TAM'

Job Activities

This tab can look empty if the activities have not been assigned to the Team. The activities can be assigned by creating appointments or manually modifying the activities using the pencil icon.

Once the activities have been allocated the user will be able to complete the activity using the desktop (No need to create a new version for this now)

The activity can be modified, the Team dropdown will be filtered depending on the user.

- If the user requires the option to add new activities they will need additional user type rights and the option to create version if applicable.

A right called Mandatory Team Selection [MTS] will be required for users assigning new activities to a job, this right requires the 'team' to be populated before the activities can be assigned. Without this right the activities can still be assigned but without a team linked to the activity it will not be visible for the user.

Job Costs

Only costs assigned to the Team will be available, this was required so the page would filter Activity and Labour Costs. Other costs such as Parts and manual entries will depend on the Cost Type being set as 'Viewable', to check this flag open the Cost Type page from the Admin menu.

Job Documents & Access to Document Categories

Job sheets can be created on a job. Using document categories you can control what user types can create different types of documents. Job sheets use mail merge to insert job details such as address, job description and information relating to the activities. If the user creating the document has user-team filtering enabled the job sheet will only generate with activities the use has access to on the job. If you have multiple subcontractors using the same user type you may wish to set their access to generate job sheets but unable to view existing documents that appear in the job document tab. This will prevent users opening a job sheet from another subcontractor login which will contain different activities.

Sites

Site Details

Users can have access to view site details but unable to modify site, archive or create job unless you provide additional user type rights.

Contacts

Access to the Contacts tab against site, ability to view contact details but unable to modify or add a new contact unless you provide additional user type rights.

Site Work Tab

The tab to display jobs raised against the site will use the User-Team filtering. This will allow users to review previous jobs they have completed against a site.

Searching

Search - Views & Groups
The search tabs for Jobs, Sites, Contacts and Assets can be used for subcontractors. Jobs, Site and Contact search pages currently filter the results based on the User-Client relationship for the logged in user. The results for the Job Search page will now also be filtered based on the User-Team relationship.

Permission for the option for 'ALL' against Jobs, Sites, Contacts and assets can be granted using the right called 'Determines if the All option is available in the search page'. Without this right the users will only be able to access search views that have been created and shared with their user types.

There is a second right to control if the users can create their own search views or see the search box on the All Jobs page. The right is called [MANAGE_SEARCH_CRITERIA]. This will allow the Oneserve client to create particular views for the subcontractor and share them with the user type. This will restrict the subcontractors adding additional columns to the search and using different filters to see additional data that the Client doesn't want to share.

Quick Search
The Quick Search box in the menu header will honour the User - Team filtering relationship.

Admin section

Teams
The admin page to manage teams will use the User-Team filtering. This provides access for the user to manage their teams, resources and their working/non working time.
It is important to allow sickness/holiday/unavailable time to be assigned to stop appointments from being scheduled to a unsuitable date/time.

User Type Rights

If the subcontractor should be moving jobs between job statuses you will need to allocate the condition rights from the workflow transitions. As this will be different for each client it has not be included in the generic subcontractor user type rights.

Code	Right Name	Details
	Page Access	
SEA_NEW	Search	Access to the Job Search, this is required as it is the default homepage for the user type
SITE_LIST	Site Search	Access to the Site tab on the search page.
MANAGE_SEARCH_CRITERIA	Search - Manage search criteria	Ability to create search views and alter the column selection in the views.
SEARCH_PAGE_SHOW_ALL	Determines if the ALL option is available in the search pages	Provides access to the ALL page on the Job, Site, Contacts and Asset search pages. Without this right the users will require search views to be shared with their user types.
RE4	Scheduler	Ability to view the Scheduler to see the appointments on a day to day view
CALRS	Calendar View	Access to the Calendar View page to view jobs scheduled to their team.
MMEN	Jobs	Required if the user type has the Scheduler and Calendar View as this right is the menu header.
QSEARCH	Quick Search Box	Will allow users to search for jobs in the quick search located in the menu header
	Jobs	
JRE	Display Job - Resource Tab	Will show scheduled appointments and working/travel time. If the users can schedule appointments they will need this tab
TAM	Time Addition/Modification	Ability to add working/travel time manually to a job. Team

		selection will be filtered by User - Team access.
JAC	Display Job - Activities Tab	Only activities that have been assigned to the Users Team will show on this page.
MWI	Modify Activities	Required to update and add activities to a job. This will be linked to Create/Submit job versions if you have versioning enabled.
MTS	Mandatory team selection	Assigning new activities to a job will require the team label to be populated. Without this right users will still be able to assign activities to a job but they will not be visible as the User-Team filtering requires the activity team field.
JCO	Display Job - Cost Tab	Only costs assigned to the Users Team will be displayed. The cost total will only reflect the costs visible and not the overall cost of the job.
VJC	View Job Costs	Required to see the cost values on the job cost tab. Linked to the right above.
MJC	Modify Job Costs	The ability to make alterations/add new costs to a job.
VINTC	View Internal Costs	Required to see the Cost column against activities on the job cost tab
AOQJC	Available in Owner Field on QJC	To set the owner field on a job to be a subcontractor the user type requires this right for the names to appear
VERCS	Create/submit Job Versions	Creating and submitting versions will be required if the users can add costs and activities entries to the job. If you are not using versioning on your application you will not need this right.
MJTS	Modify job team/service	After creating a new version the option to modify the job team and service will be available. Only teams suitable for the job

		and assigned to the user will be available.
ALL	Re-Allocate Jobs	To modify the job team/service the user requires the re-allocate jobs right.
CJA	Create job for any team	To modify the job team/service the user requires this right.
JAM	Job/incident Addition/Modification	The ability to change job details
	Appointments/Scheduling	
APO	Appointment Making	Required to make any appointment on the system.
RSA	Reschedule an Appointment	Provides the Reschedule option against appointments on the Resource tab.
AAC	Add Appointment to Complete Job	If the user will be managing jobs through the desktop they may need the option to book an appointment once it has been completed so the job records match the actions completed outside of Oneserve.
AAM	Appointment Addition/Modification (Old RS)	Required to provide the options to Cancel, Reschedule and Update scheduled appointments.
CSA	Change Team when creating Appointments	If the user has been linked to multiple teams they will need the option to change the Team on the scheduling pages.
CPA	Create a pooled appointment	Access to the pooled appointment booked
CFA	Create a fixed appointment	Access to the fixed appointment booker
PCODA	Change to Post Code Any	The option to pick up additional resources depending on the postcode coverage.
SCH_MOD_RESOURCE	Scheduler - modify resource	The ability to change the resource name. This will make it easier to schedule one resource at a time.
SCH_MOD_RES_ZONE	Scheduler - modify resource zone	Enables the resource zone dropdown. The following two

		rights will provide the options that appear within the dropdown
SCH_MOD_SERVICE	Scheduler - modify service	The ability to change the service whilst scheduling appointments using the dropdown box
SCH_MOD_SER_SKILLS	Scheduler - modify service skills	Activates the primary/secondary service drop down. This will hold the option to change the available resources depending on who has the selected service as their primary or secondary service.
SERSE	Change to Service Primary and Secondary	With the right above the user will be able to select the Primary and Secondary service option.
SCH_MOD_SUPPLIER	Scheduler- modify team	The ability to change the supplier/team whilst scheduling. This will be required if the users will be assigned to multiple teams.
SCH__MOD_MULTIDAY	Scheduler - multi day appointments	The ability to select the multi-day option to schedule appointments that span over one working day.
SCH_MOD_DURATION	Scheduler - override duration	The ability to alter the duration field for the appointment. By default the appointment duration will use the total duration taken from the selected activities.
Sites		
SWO	SWO Display site - Work tab	Access to the Work tab against a site. This will show all jobs raised against the property the user has access to
SCO	Display Site - Contacts Tab	Access to see the contacts against a site. No option to alter the contact details.
Teams/Resources		
SSM	Teams	Access to the admin page for Team.
ADMIN_TEAMS	Teams	This right is required for the SSM right above as this is the

		parent right.
MSAD	Admin	Access to the admin menu, this will add the cog in the header. Required if the user needs the Teams page.
EDIT_TEAM_WORK_TIMES	Teams - Edit Working Times	Ability to access the working/non working tab against a team to add holiday, sickness, training, bank, holidays or overtime. This will apply the time to all resources within the team
VIEW_TEAM_RESOURCES	Teams - View Resources	Access to the Resource tab against a team
EDIT_TEAM_RESOURCES	Teams - Edit Resources	The option to add new or edit existing resource accounts. This can be resource details, post code coverage and if the account is active or inactive
VIEW_RESOURCE_SERVICES	Resources - View Services	Ability to view the services assigned to each resource, this is used to determine if a resource will be available for different types of work
EDIT_RESOURCE_SERVICES	Resources - Edit Services	The option to edit and add additional services to a resource. This will allow the user to manage what jobs each resource will be available for depending on their skill set.
DELETE_ALL_RESOURCE_SERVICES	Resources - Delete All Services	The option to remove all services linked to a resource
EDIT_RESOURCE_WORK_TIMES	Resources - Edit Working Time	Ability to access the working/non working tab against a resource to add holiday, sickness, training, bank, holidays or overtime.

Considerations

Job Team
The Job team can be a Team the user does not have access to. The Team field will be visible on the Job Details screen. This is because the User-Team filtering is achieved by filtering by Job team and/or Activities and you can have multiple teams assigned to different activities on one job.

The following pages **will not** use the User-Team filtering.

- Appointment Search
- Job History
- Job Survey
- Job Attributes

Search - Activity columns
They will display the total quantity for activities on the job and not filtered by User-Team. Therefore we do not recommend creating subcontractor search views depending on the activities being completed or not.

Search - Columns to avoid

- All Activities Complete
- Total Activity Count
- Total Completed Activity Count

Mobile Application
The mobile user will be able to see all activities on the job, they will only have access to click on the activities assigned to their appointment.