Quick Start Guide

Teamnio

Academic Edition

Contents

Introduction: automated workflow

This Quick Start Guide is our road map to a seamless integration between Moodle and Teamnio to track student activity. We´ll get Teamnio up and running in less than 60 minutes, and explore its benefits along the way.

Who needs to learn Teamnio?

This guide is aimed at the persons in charge of Moodle, who will set up Teamnio as an integrated solution to the already existing Moodle environment.

Given the fact that the student tracking technology is fully integrated into Moodle, its implementation doesn't require the students, the teaching staff, nor anyone else in the organization to learn how to use Teamnio. All they must do is use Teamnio's apps.

Teamnio's apps

Teamnio offers 3 apps:

	Optional	Easy!
Desktop App	☐	☑
Web App	☑	☑
Mobile App	☑	☑

Students and teachers only need to learn one "new thing": **Open the desktop app, login and logout,** but they also have optional access to the useful web and mobile apps

You, as Teamnio's admin for the school, can limit user access to the modules of your choosing within the web and mobile apps. For instance, you can create:

- Simple accounts for students and teachers (i.e. time tracking reports)
- Advanced accounts for course designers, so they take full advantage of the Teamnio Content Creation Framework: a collaborative project management environment with processes and version control, as well as a single Push to Moodle feature
- Any other user profile that fits your organization can have a customized level of access and permission to specific features

Ok! Then show me the goods!

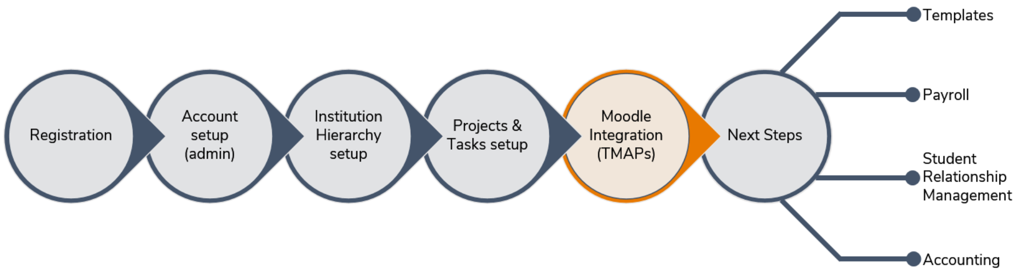
The main purpose of this guide is to set up Teamnio´s Moodle integration through T-MAPs. If you want to jump right in, we recommend reading the T-MAPs document, which offers an integration-focused overview. For a proper learning experience, please start at Section 1(Registration) of this document to avoid knowledge gaps.

Having said that, we're ready to begin!

Let's take a quick look at the steps required to set up a customized Teamnio integration with Moodle.

Teamnio: setup summary

This document is structured to easily obtain global results in 5 steps.
After that, we´ll be able to explore further possibilities in any order.



Step one: Registration of the organization

In the first step, we will register our organization's details and generate Teamnio's online environment, called the "Web-App". This is performed by the "Organization's Representative" (OR), which is the person from our organization who communicates with Teamnio's side and manages the Licenses, including the related payments to Teamnio. After that, we'll install the Web-App's local counterpart, called the "Desktop-App".

Step two: Account set up for the administrator

In step two, we'll set up the administrator's account. This main account will have full access to all of Teamnio's features and it will be assigned to the "Organization's Administrator" (OA) to set up and test the system. The testing consists of setting up Time Tracking for the admin account to peek into the system's tracking and reporting functionalities.

Important!
Remember the difference between roles. The Organization Rep is the person that contacts Teamnio and handles the Licenses' payments, whereas the Organization's Admin is the administrative user that has full permissions and access to the organization's data within Teamnio. **By default, step one generates two separate accounts, one for the OR and another for the OA**. This is a necessary security measure. The OR and OA accounts can be managed by the same person, but consider that **using the same username and password for both accounts might represent a security risk**.

Step three: Company hierarchy setup

In the third step, we'll customize Teamnio to our organization's structure by setting up a hierarchy to define access levels and permissions for all the users.

Step four: Projects and tasks setup

Then, we will create a project and assign tasks to all of our team members, to then see the immediate results on the Time Tracking and Reports modules.

Step five: Moodle integration setup

Finally, we will integrate Moodle with Temanio via the T-MAP plugins, which will allow us to track student activity and generate reports of their:

- Sign-in and sign-out times (TLT plugin)
- Activities they access (TAT plugin), and
- Cheat prevention records (TCT plugin).

Next Steps: More benefits!

From this point onward, we'll be free to explore four other areas in any order we want:

- **Templates** are a big part of Teamnio. Any configuration that requires repetition includes a template creation category. In this section, we´ll be creating templates for Time Tracking, Attendance, and Projects.
- The **Payroll** module includes the tools to calculate and keep track of everything related to compensation for the teaching and administrative staff of the organization, as well as any other collaborators. It allows for both compensation models: hourly and fixed salary.
- The **Student Relationship Management** features include all the tools and functions to create a customized pipeline to track potential students, turn them into prospects, and then into registered students; all the while establishing a solid relationship that leads to improved registration and retention rates.
- And finally, the **Accounting** module consists of a set of tools to manage income, expenses, transactions, and invoices

Let's get to it!

How to use this guide

The Go! box

This guide includes all the steps to get up and running in no time!
We will focus on results and leave the wordy explanations for the user manual. The steps will show you what to do directly on your system, but from time to time, we also show you examples in-between those demonstrations. The examples show how Teamnio's features look in a live environment.

Right after the examples, we'll remind you to **Go!** and try the steps on your own system with a colored box like this one, including some important steps to Remember

Go

Go ahead!
Check your screenshots now!
Remember to Submit the date.

The **fast** lane

After getting familiar with this guide, you can use it even faster. Focus on the **action steps** of each demonstration, which are marked in **bold style.** Secondary information is also underlined.

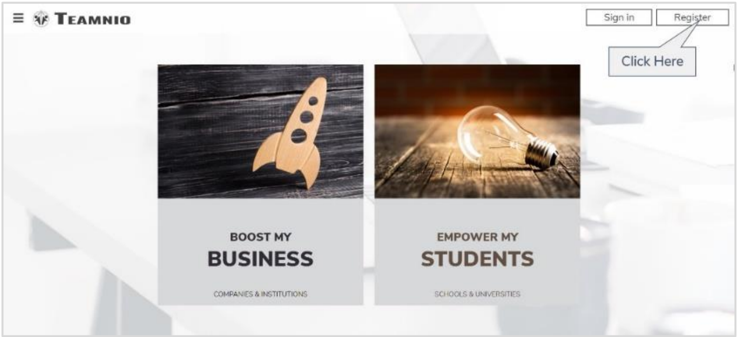
Step 1: Registration

Teamnio is hosted on the cloud, so we can get started right away. There are two possibilities for registration. The Academic Edition, or the Business Edition. Regardless of which we choose, the registration stage requires the same set of steps.

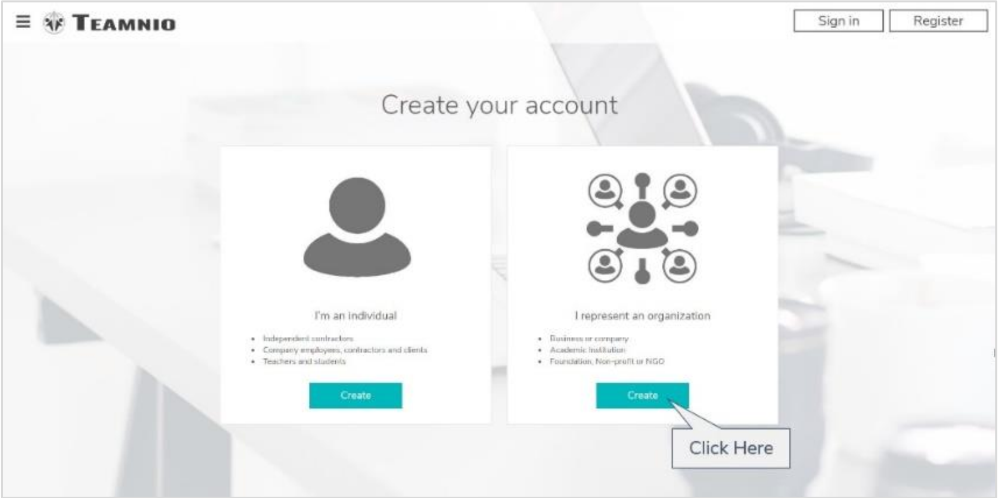
1.1 Registration (first steps)

At the end of this process, we will obtain the organization´s Representative Account.

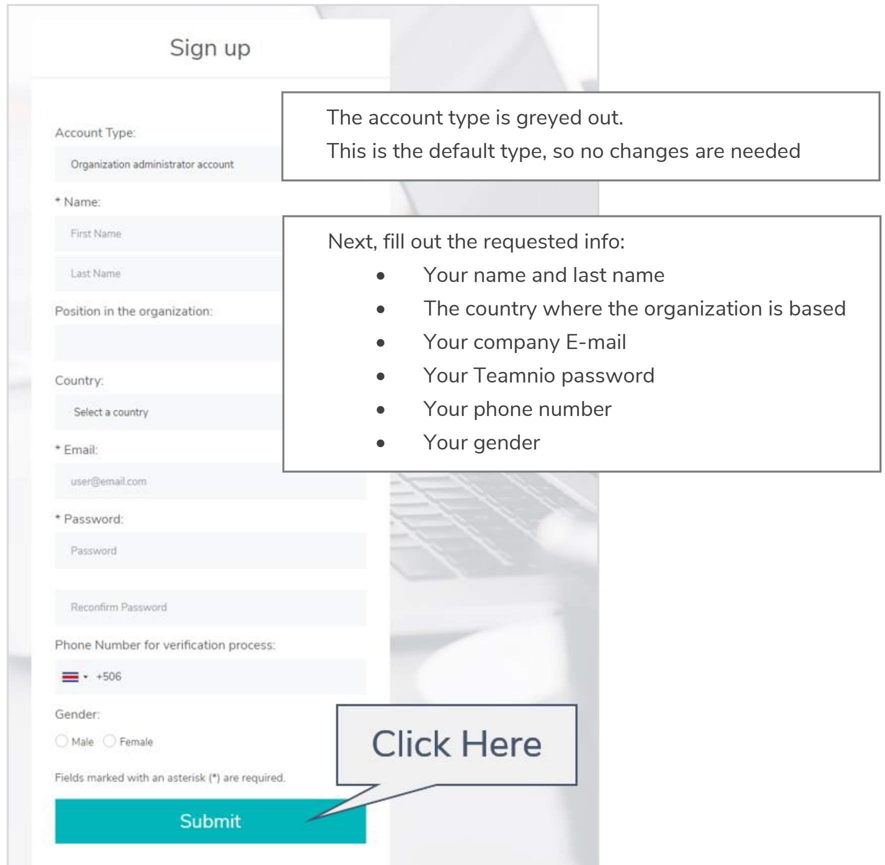
1. **Go to Teamnio.com and click the *Register* button**, located on the top right corner of the screen.



2. The following screen includes two alternatives, either for individuals or Organization Representatives.
    - For now, ignore the "*I´m an Individual*" section. It will become useful later to streamline the user creation stage. For more details, see 3.5.2. (External User Creation).
    - This is the first Teamnio registration for our organization, so **let's go to** the section called ***"I represent an Organization"*, and click *Create*.**

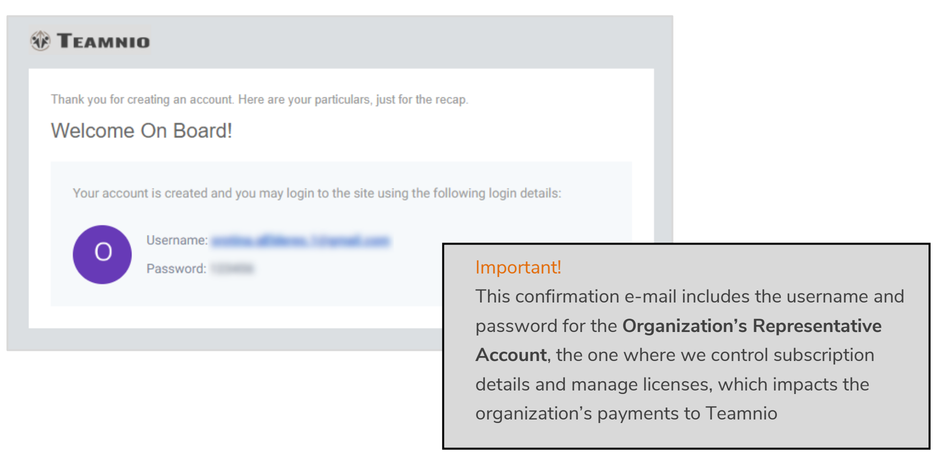


3. Next, let's **fill the form** with the organization's details and click *Submit*.
   To proceed, the only required fields are <u>*Name, Email, and Password*</u>. But it's highly recommended to <u>at least fill the phone number</u> to guarantee a proper confirmation stage.
   Remember: this is the data used to create the Organization's Representative Account

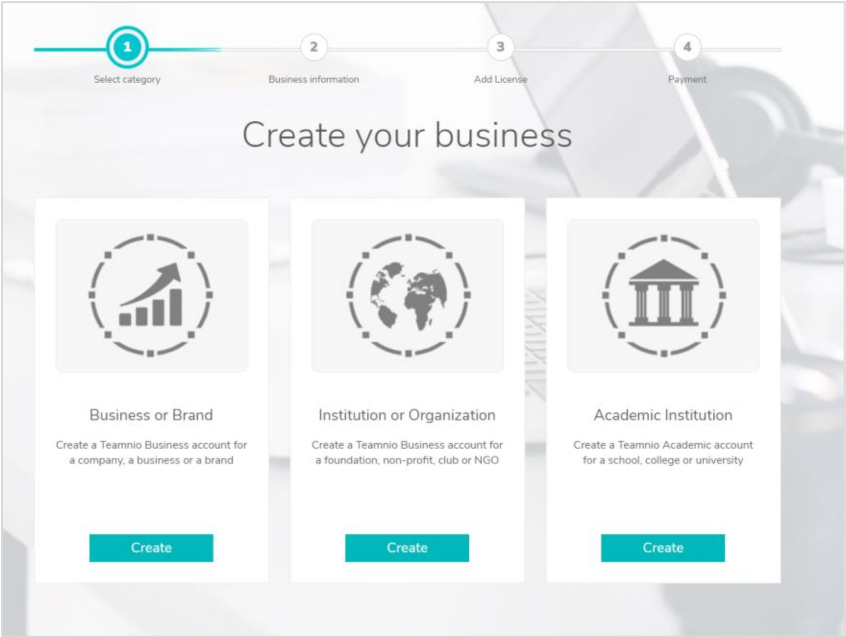


   This submission will generate two confirmations, via e-mail and SMS.

4. **Check your e-mail for the confirmation message**. Depending on the e-mail account's settings, this confirmation might end up in the spam folder. We must check every folder to find the confirmation message.
   When we **find the email**, it should look like the picture below.
   Copy the credentials and keep them in a secure location**.** <u>They provide access to the Organization's Representative Account, which controls payments to Teamnio and other license management options.</u>



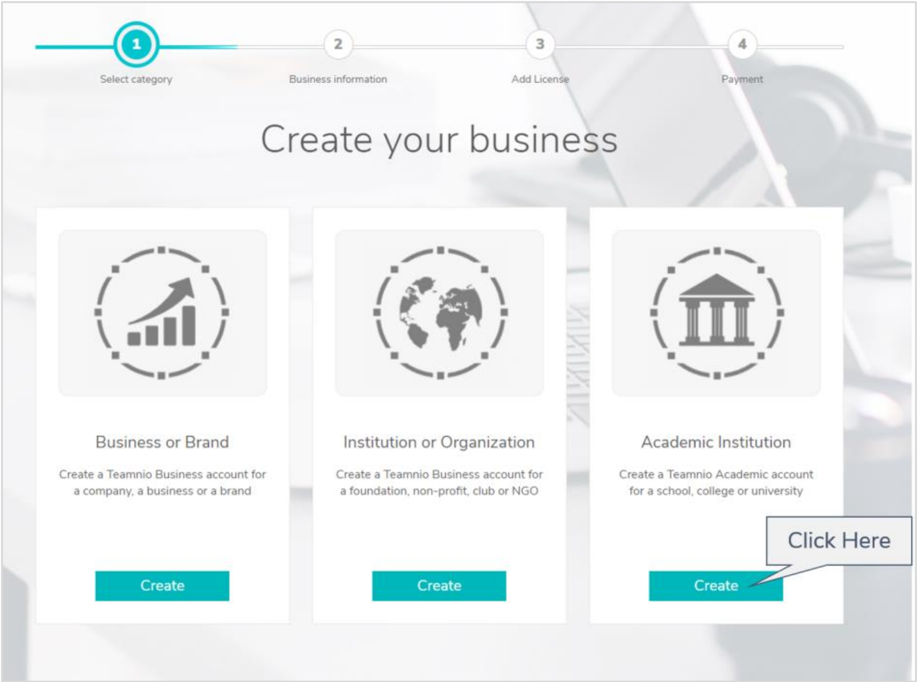
5. Let´s **go back** to the registration process within the **web browser.**
   The Submit button from the last page redirected us to this page. This is the first of four steps.
   Let's **choose our organization type**. Here is where the paths diverge.



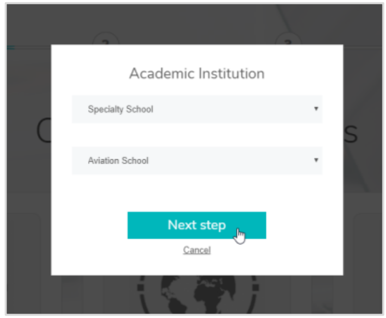
1.2. Academic Edition

This stage of the process starts after completing section [1.1 Registration (first steps)]

1. In the *Academic Institution* box, click on **Create**



2. A selection dialogue will pop up. **Make the appropriate selections** to specify your type of academic institution, and then click *Next Step*



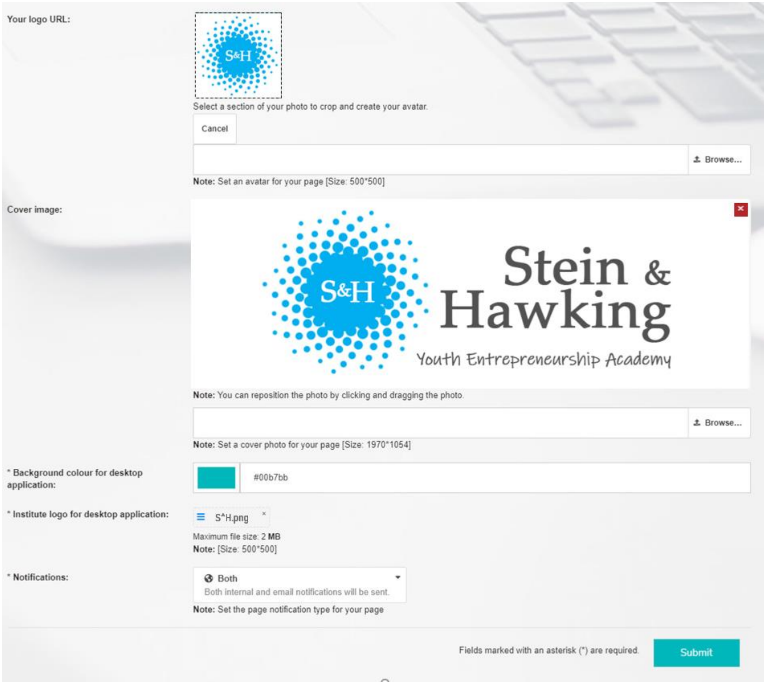
3. **Fill the Institution Information Form**.
   The following fields are required to submit this form:
   - Institution Name
   - Create a public page in Teamnio to promote your business
   - Background color for desktop application
   - Company Logo for desktop application, and
   - Notifications

Within "Your Institution Information":

a. Fill the **Institution Name**. <u>This is a required field</u>.
b. Directly below, **click the *Check* button** to determine if the Permalink is available
c. **Type the organization's Description and its contact information**:
   i. Website link
   ii. Phone number
   iii. Adress. In here, we can press the *Detect My Location* button to populate this field easily
d. Select the **working hours** from the available alternatives
e. Next, we have the <u>required field</u> called "***Create a public page in Teamnio to promote your business***". We must select the alternative that best fits our specific purposes. Each one is clearly explained.
f. The field "***Your Logo URL***" is used to generate the welcome screen image of the Web App.
   Click *Browse* to select the image. It should be 500x500 pixels in size.

> Important!
> The permalink will be the main URL to access your Teamnio environment.

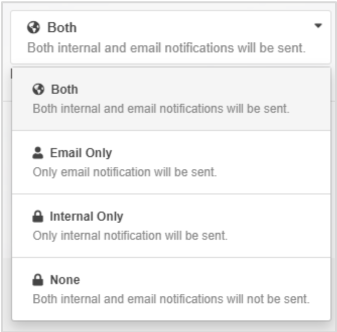
g. On the "***Cover Image***" field, **click *Browse* to load** a background image. This should be a large image of the institution's logo for optimal high-quality display on the user interface of the Desktop App.
The students will see this image when they sign in to Teamnio's Desktop App on their computer to track their attendance or activity within Moodle.
<u>To proceed, we have to fill the next three required fields</u>.



h. "***Background color for desktop application***" is a color selector.
Just click on the color and **drag to select it**. The hex code of the selected color will be shown in the adjacent textbox, which is useful for graphic and web design purposes.

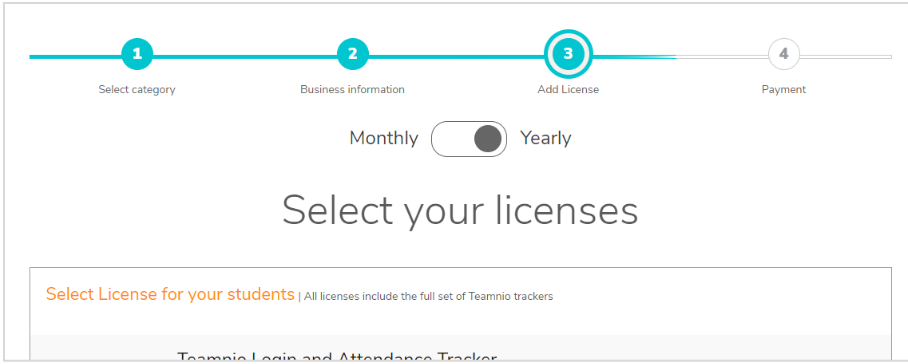
i. "***Background logo for desktop application***" is the image that will show in the local interface for each student
Click on ***Choose File*** and load the institution's logo. The file should be 500x500 pixels in size.

j. Finally, **select the *Notification*** option. Each item includes a summary of its functionality.

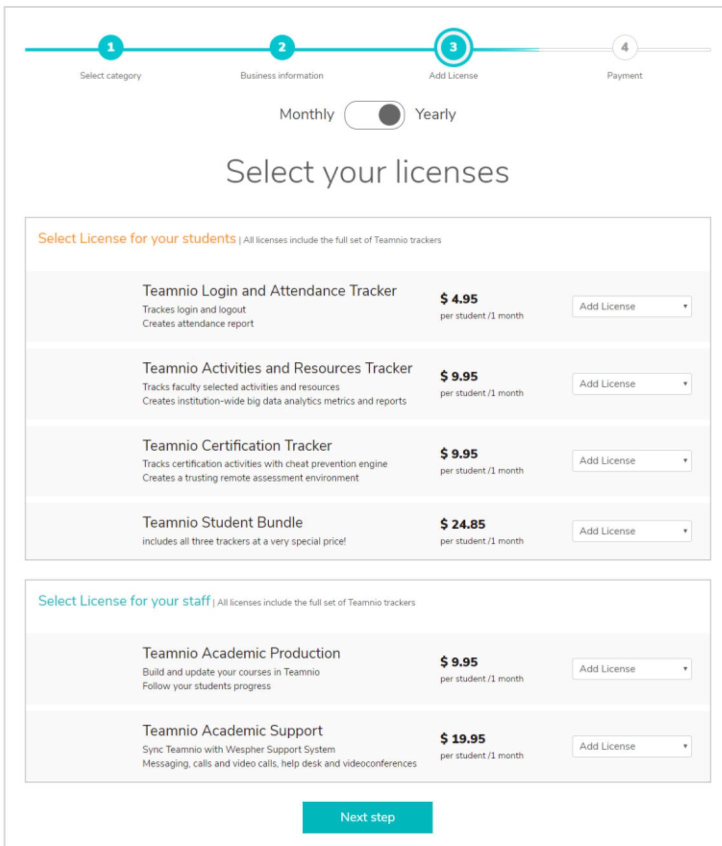


k. To finish with the business information form, click *Submit*.

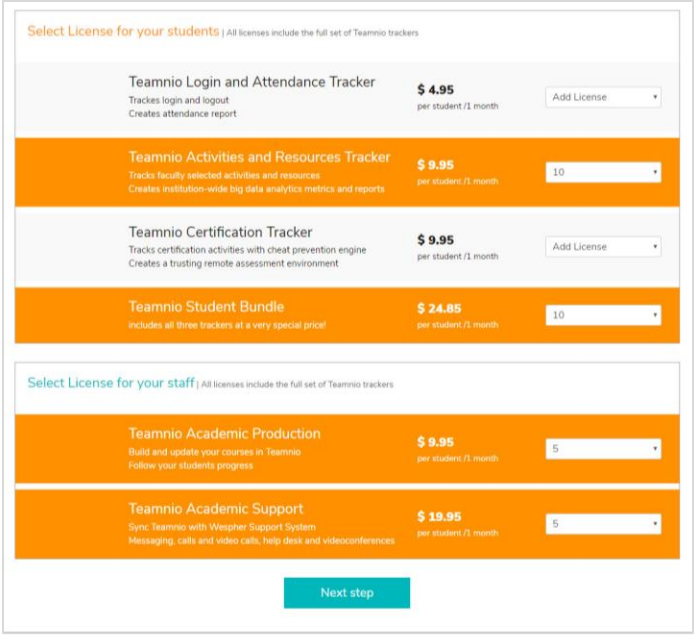
4. The third registration step is up next
    a. First, we must select if we want to pay **Monthly or Yearly** by clicking on the slider



    b. Then, we must **select the number of licenses** for our organization. There are two types of licenses, for students and staff members. Each item includes a functionality summary

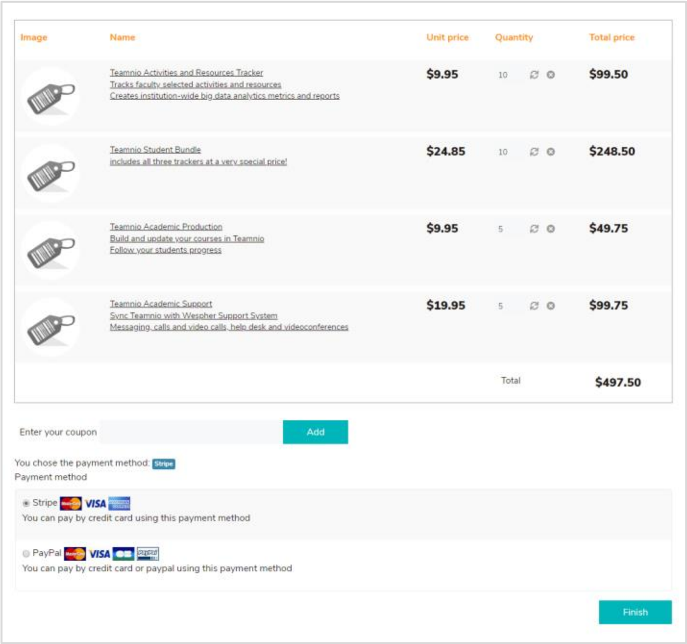


c. **Click *Add License*** and select a number for each Edition type.
The boxes will turn orange to signify the finished selection. If you aren´t quite sure about these numbers, don´t worry, you can always add or remove licenses later.

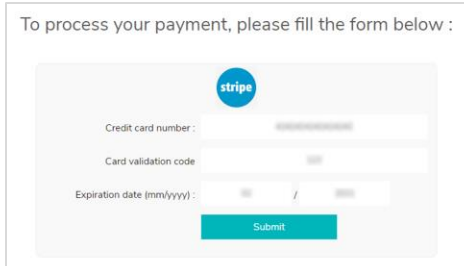


d. To confirm and proceed, click *Next Step*

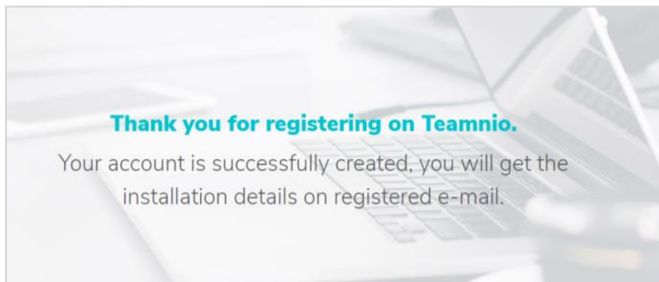
5. Payment is the fourth step of the registration process
   a. The first screen contains the order's summary, where we can edit the quantities for each license type
   Select the *Payment Method* here. There is also a field to type a coupon code.
   Click on *Finish* to proceed



6. Finally, **fill the payment details and click *Submit***

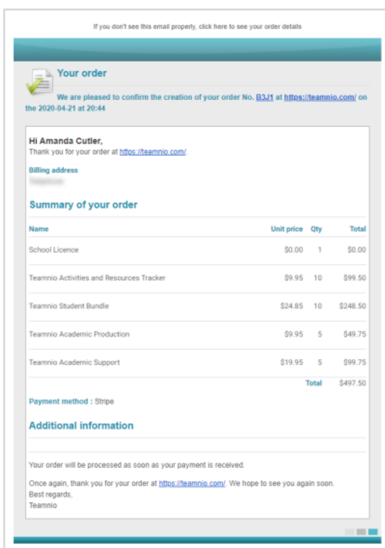


7. That´s it! The Organization Representative account has been successfully created within Teamnio

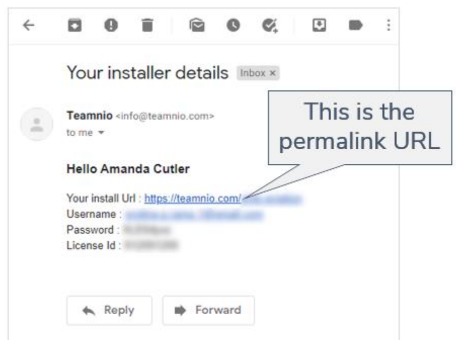


8. Now, let´s **check the confirmation e-mails**. We should have received two:
   a. The order's receipt
   b. The account's credentials.

Order's Receipt



Account's Credentials



Important!
The confirmation e-mail includes the username and password for the **Organization's Administrative Account**, the one where Teamnio's functions are set up for the whole organization.

9. From the account credentials information:
   a. **Save the permalink URL to your favorites.** This is the link that the Organization's Administrator will need to access the Teamnio environment.
   b. **Save your username and password.** You will need them to sign in to Teamnio as the Organization's Admin
   c. **Save your License ID.** You will need it to:
      i. Test the desktop app (2.2.2.)
      ii. Implement the external user creation procedure (3.5.2.)
      iii. Integrate Teamnio with Moodle (5.3., 5.4., and 5.5.)
      iv. Facilitate it to students so they can access the desktop app (5.3.4., and 5.4.2.)

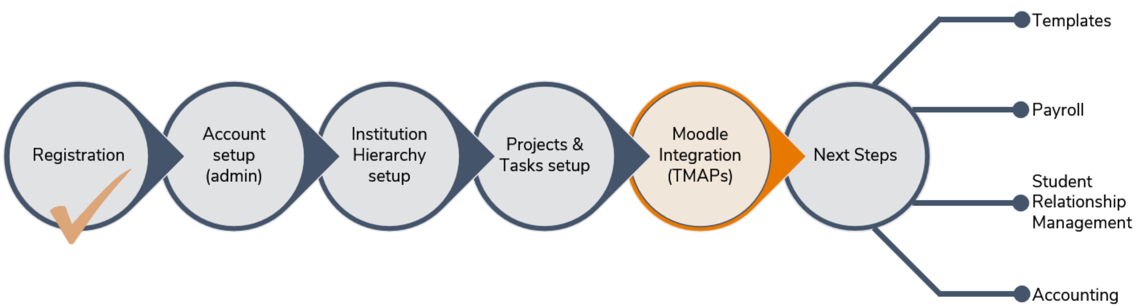
We've successfully registered to Teamnio!

1.3. Business Edition

This stage of the process starts after completing section [1.1 Registration (first steps)]
For more information about registration for business organizations, please refer to Teamnio's Quick Start Guide for Business.

Step 1: Congratulations!

We´re all set!
To continue with this Quick Start Guide, let's go to section 2 of this document, to set up the Organization's Administrator account.



Step 2: Organization's Administrator Account setup

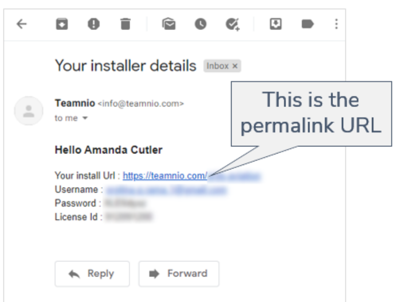
Let's set up the administrator's account for live use, and in the meantime, we will perform some basic configurations to test the time tracking functions, as well as some basic reports.

2.1. Account setup

The following steps require to have registered first (sections 1.2. Business Edition or 1.3. Academic Edition).
Let's get the organization's administrator account ready to start setting up the Teamnio Environment for the rest of the team.

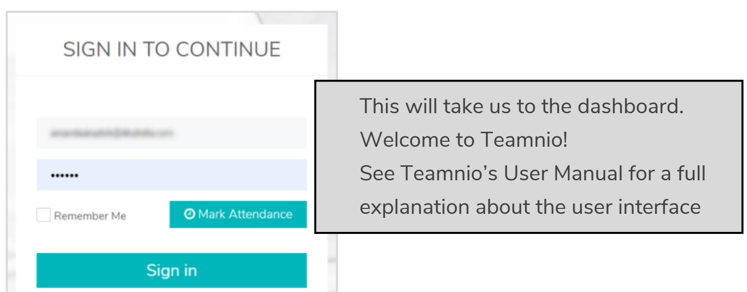
1. First, we must **open a browser and access our organization's permalink**, the one we received via email after the registration process.

   The permalink should be similar to this: https://teamnio.com/[Organization's-Name-Here]
   The email should look like the one below:

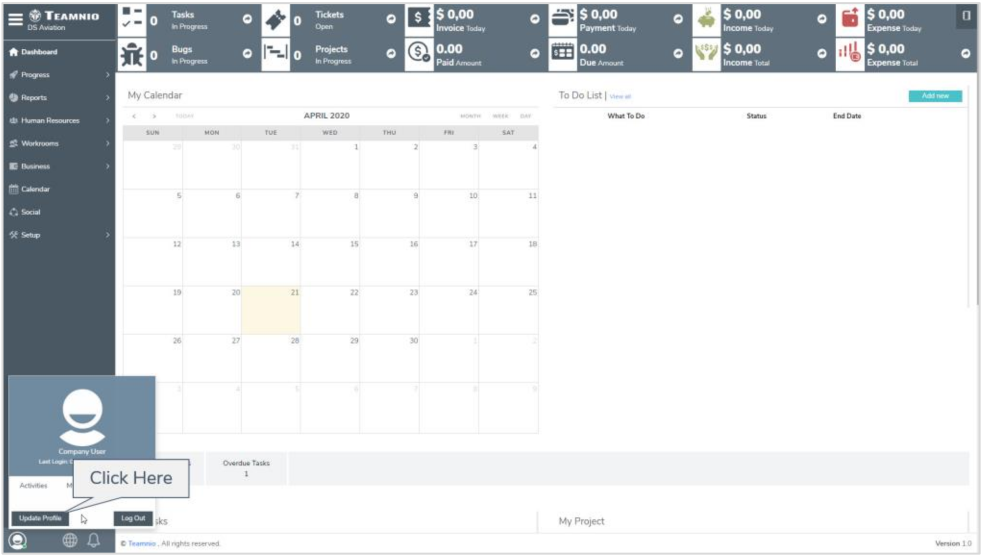
   

   It's recommended to save this permalink to our favorites.

2. **Enter the credentials** included in the confirmation email and click *Log in* to continue.



3. We´re ready to start setting up the Admin's account, which is an empty slate at the moment.
Go to the bottom left corner, **click the generic avatar icon and click on *Update Profile***



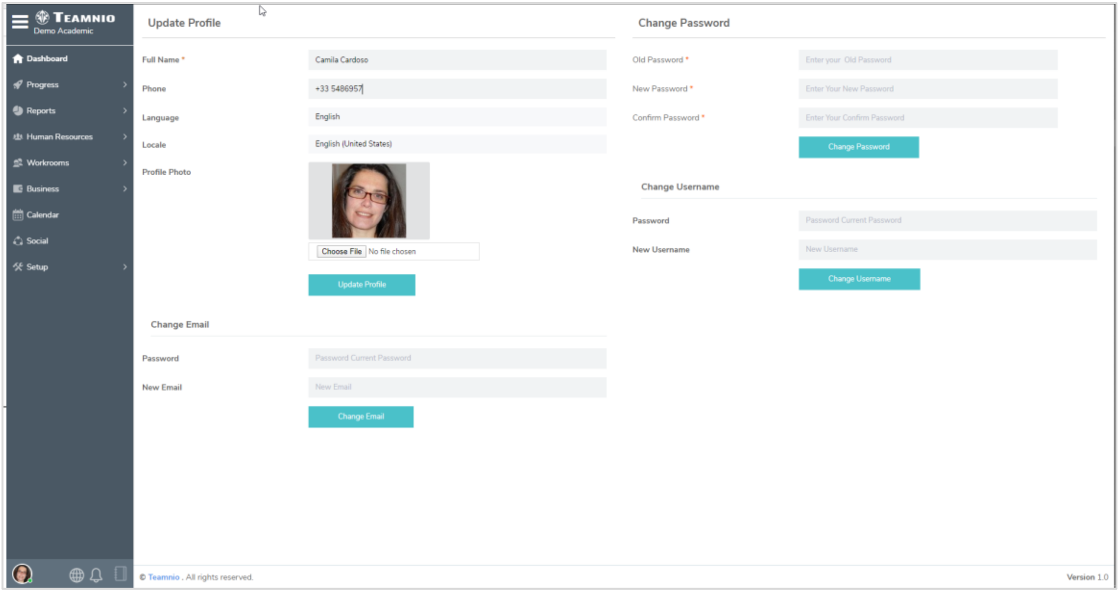
4. This is the *Update Profile* screen. Let's **customize the administrator's profile.**

a. **Enter their details**, including name, phone, language, country, and photo.
Click *Update Profile* to confirm the changes.

b. It highly recommended to **set up a new password**
This is done by entering the old password, the new one, and the confirmation of the new one, before saving the changes by clicking *Change Password*

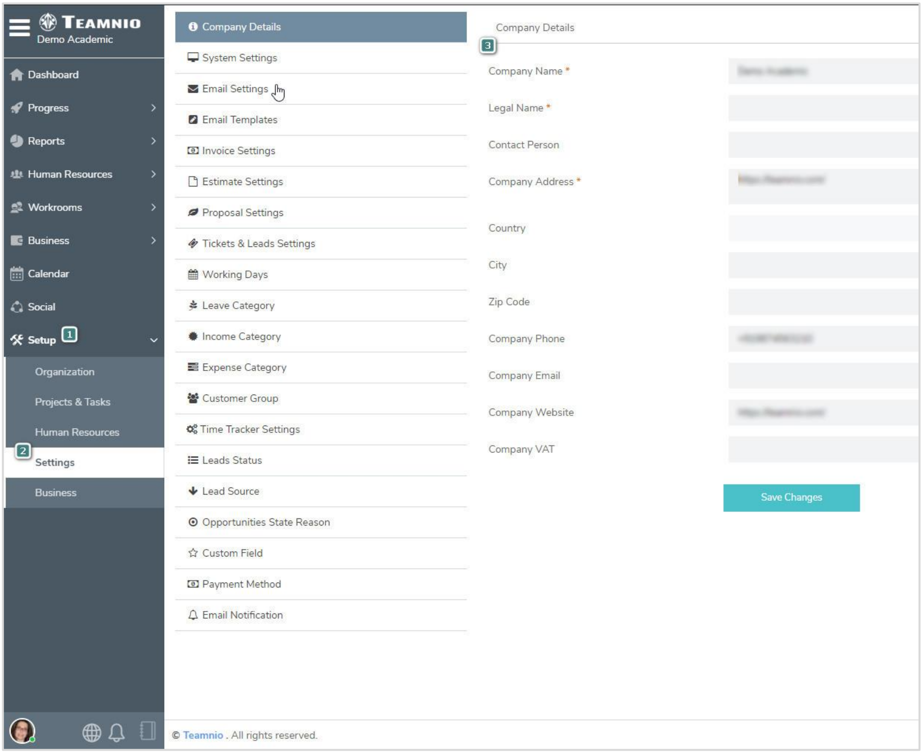
c. It is also desirable to **establish a new username**, which helps to log in faster. Enter the current password, the new username and hit *Change Username*
Consider using a similar scheme for all usernames. Example: use the name's first letter and the whole last name. For the image below, this scheme would generate the user "Ccardoso"

d. Finally, we can change the email related to the account. For now, this is unnecessary. We'll keep the one on file.



5. Now it's time to **fill out the institution's details**.
    a. Go to the left navigation panel, click **Setup, and then click *Settings***.
    This pops up the *Settings* Categories, with the *Institution Details* section selected.
    b. Let´s **fill the necessary information** on the form and confirm by clicking **Save Changes**

This is it! We're reading to start testing!



Before moving on, let's remember the *Setup* module. This is a very important section of the interface that we´ll use a lot later.

2.2. Preliminary tests

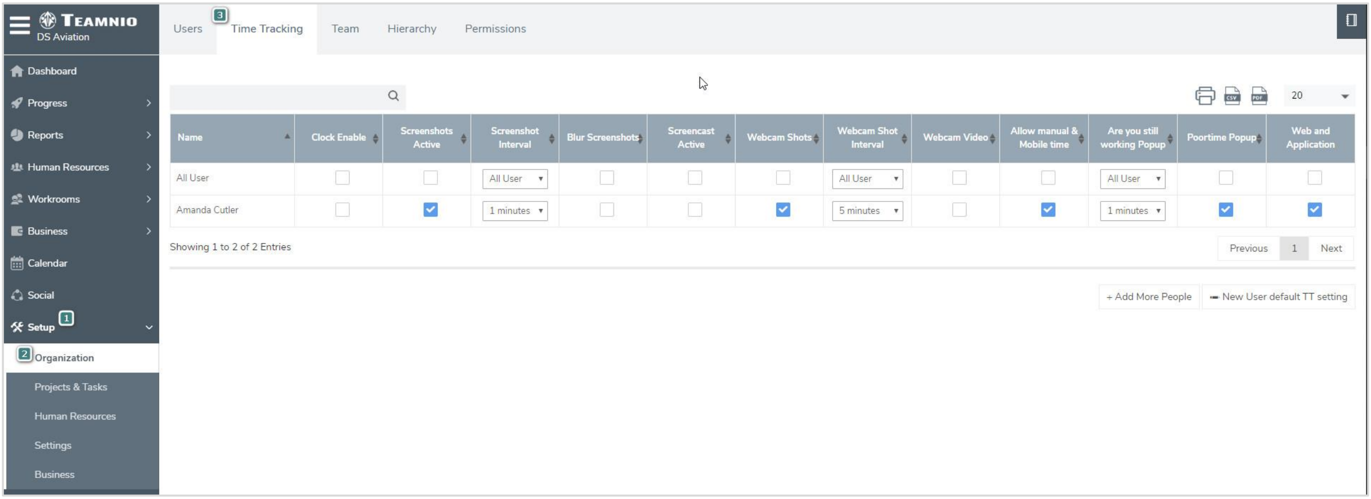
Let's perform some preliminary tests to see the time tracking functions in action. This requires to review some default settings to understand how the desktop app performs time tracking.

2.2.1 Review default TT settings and tasks

1. On the left navigation panel, click on **Setup** and ***Organization***
   Most of Teamnio's Setup sections offer this kind of interface, with several tabs on the top
2. Click on ***Time Tracking***
   This table includes all the settings for the admin user. Teamnio offers 12 customizable tracking parameters for every user:

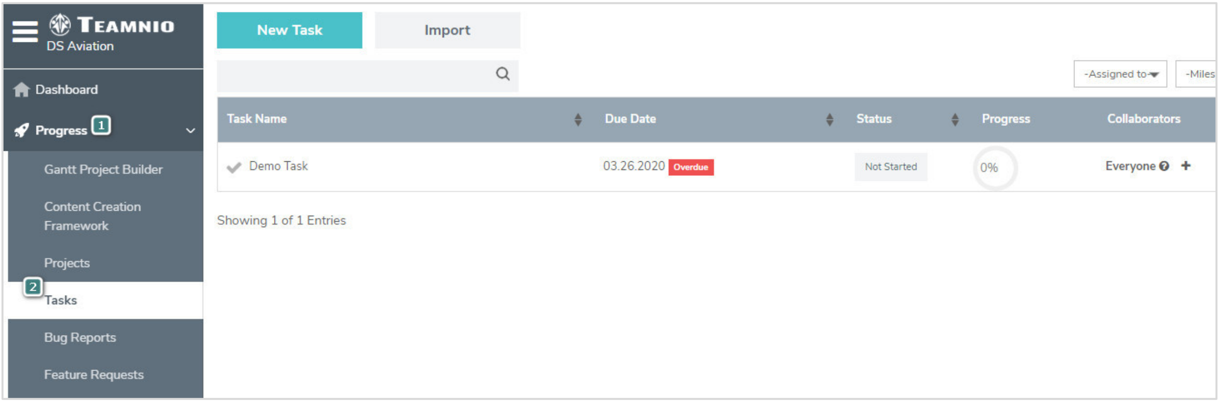
Parameter	Function
Clock Enable records attendance	Tracks user attendance; it can also track tasks independently
Screenshots Active	Takes screenshots of all of the user's screens
Screenshot Interval	Time interval between each screenshot
Blur Screenshots	Blurs the screenshots and makes text unreadable, for data protection and privacy purposes
Screencast Active	Records video from all of the user's screens
Webcam Shots	Takes photos of the user using the webcam
Webcam Shots Interval	Time interval between each webcam shot
Webcam Video	Records video of the user using the webcam
Allow manual & Mobile time	Enables manual time tracking entries and allows to track time with the mobile app
Idle time pop-up	Time interval of user inactivity before Teamnio pops up the "Are you still working" dialogue
Poortime Pop-up	Pops up a dialogue when the user accesses apps or websites from a custom list (such as Youtube or Facebook)
Web and Application	Tracks apps used and websites visited in the tracked computer

Let's review the activated parameters for our user. The 5 enabled parameters shown in the image below will be recorded when we start tracking time on the desktop app.



Time tracking requires the user to have been assigned to a task or a project.
Fortunately, the system includes one generic task. Let´s go see where it is.

3. On the left panel, let's go to ***Progress*** and click on ***Tasks.***
   There is a demo task already created. The *Collaborators* column shows that it's assigned to everyone, which means it's already assigned to us and any other new user that we add later on.
   For that reason, we should make a note to delete this task before the system goes live.

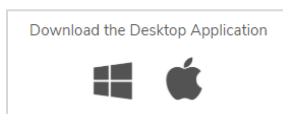


We're ready to start testing. Let's setup Teamnio's desktop app to go ahead.

2.2.2. Install and test the desktop app

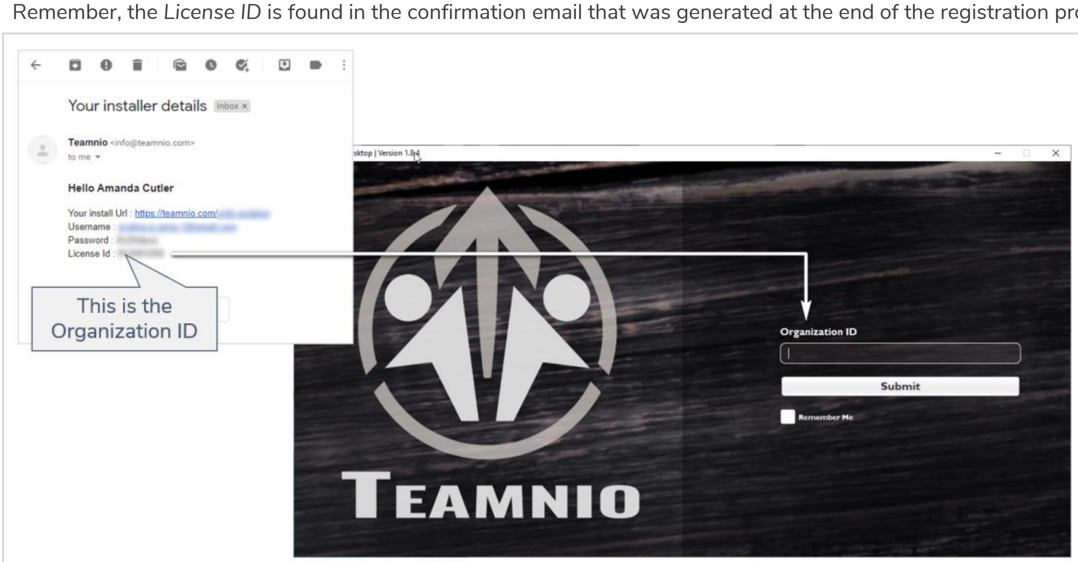
2.2.2.1. Install & test (Windows and Mac)

1. To install Teamnio's Desktop App, **go to your permalink URL** and **select the operative system**

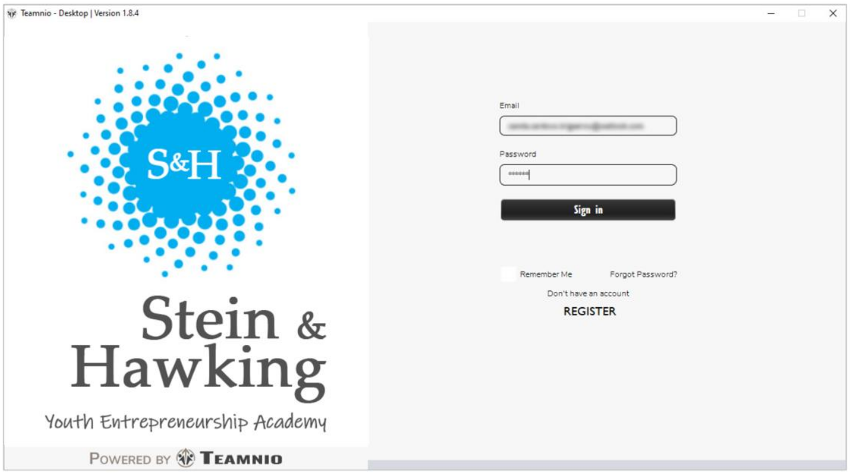


2. After the download is complete, **execute the installer** and **open the application**.
   Mac Os users might need some extra steps for installing and authorizing the app. Go to section [2.2.2.2.](#) for more details
3. Now, let´s **type the organization ID and click Submit**.

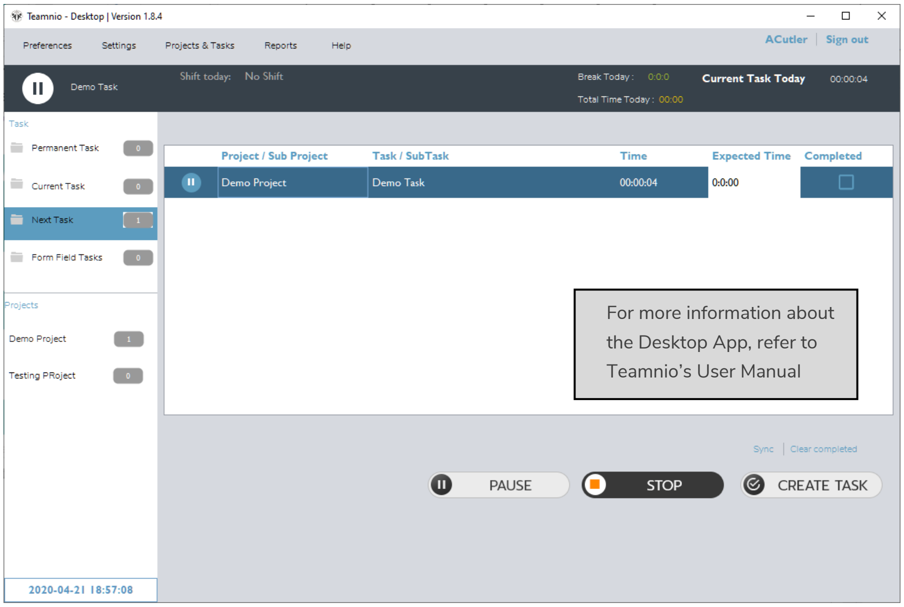
Remember, the *License ID* is found in the confirmation email that was generated at the end of the registration process



4. The next screen shows the login screen with the institution’s logo we set up during the registration.
   This is the same image the students will see when they sign in.
   Let’s **enter our username and password** from the confirmation e-mail, and click ***Sign In***

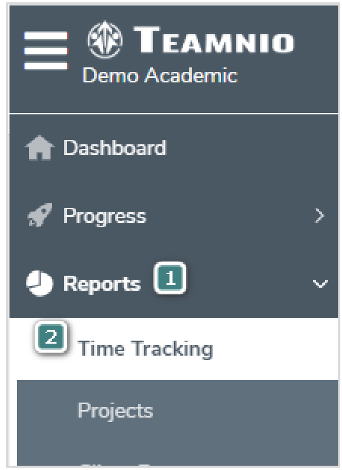


5. This is the desktop app.
   a. Click *Next Task* on the navigation panel to the left, which shows the Demo Task we reviewed before
   b. Let’s **select *Demo Task*** to start tracking time with it.
      As a result, the task becomes highlighted and the time counters start running.
      We´re going to let it run for some time, while we continue to work for about 5 minutes



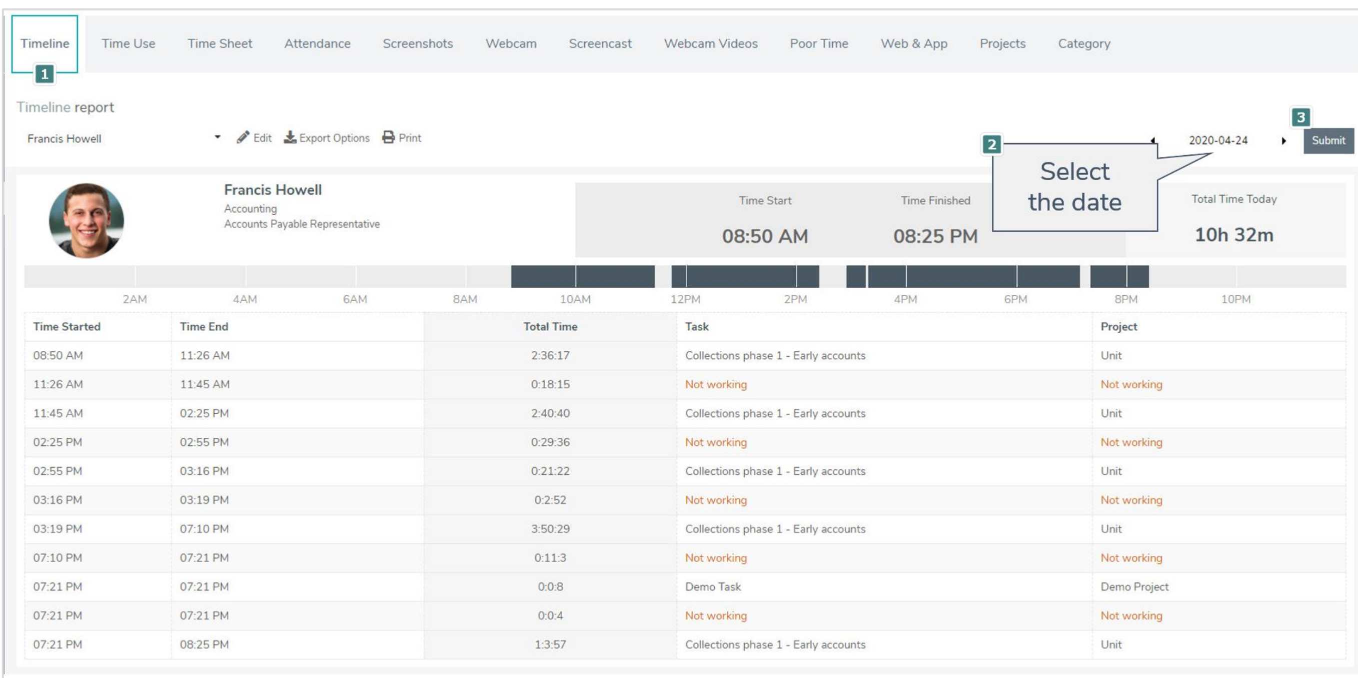
While the 5 minutes go by, let’s see three reports: Time Tracking, Screenshots, and Task Summary.

6. First, let's take a look at the tracked time and its three main reports: Timeline, Time Use, and Time Sheet
   a. In the left panel, **click Reports** and access the ***Time Tracking*** sub-module



   b. The **Timeline tab** is shown automatically. Here, we can see the tracked activity for a single day, including the time ranges, the tasks performed, their project, and the inactivity ranges
   c. To see Timeline data properly, it's necessary to select the correct date and click *Submit*.

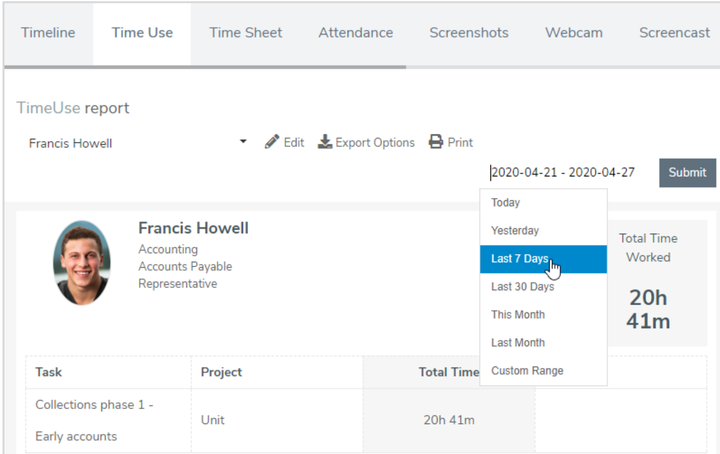
   In the example below, the user has been working for a whole day, including several breaks



The same process applies for the tabs *Time Use*, and *Time Sheet*

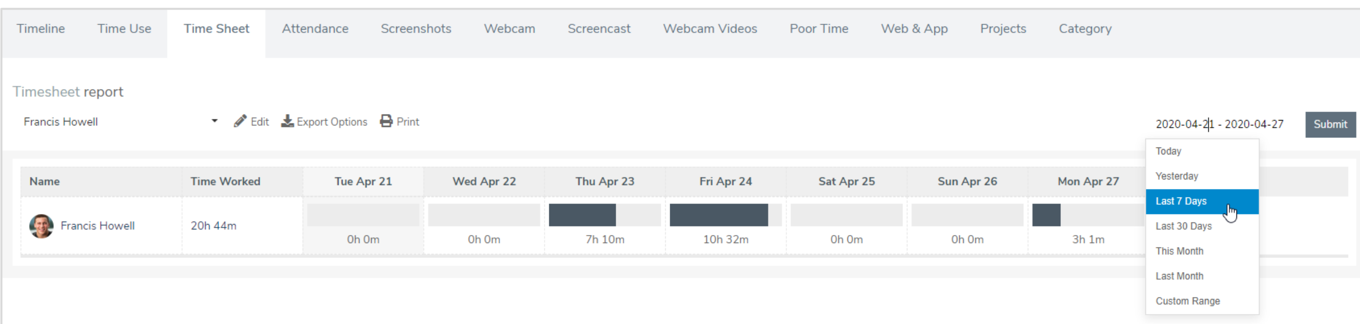
d. Click on *Time Use*
This screen shows the total time worked for a specific range of time, from one to several days.
Clicking on the time range offers several options, including a custom range.
Select a date range that includes the current date and **click Submit**

In the example below, the user has worked almost 21 hours through the past 7 days. When did he work those hours? The *Time Sheet* report provides that information.



e. Let's click on ***Time Sheet***
   This report shows the exact number of hours worked each day for a specific date range
f. To set it up, just **select a date range and click *Submit***

Continuing with the example, we can see the days when the user worked and the number of hours

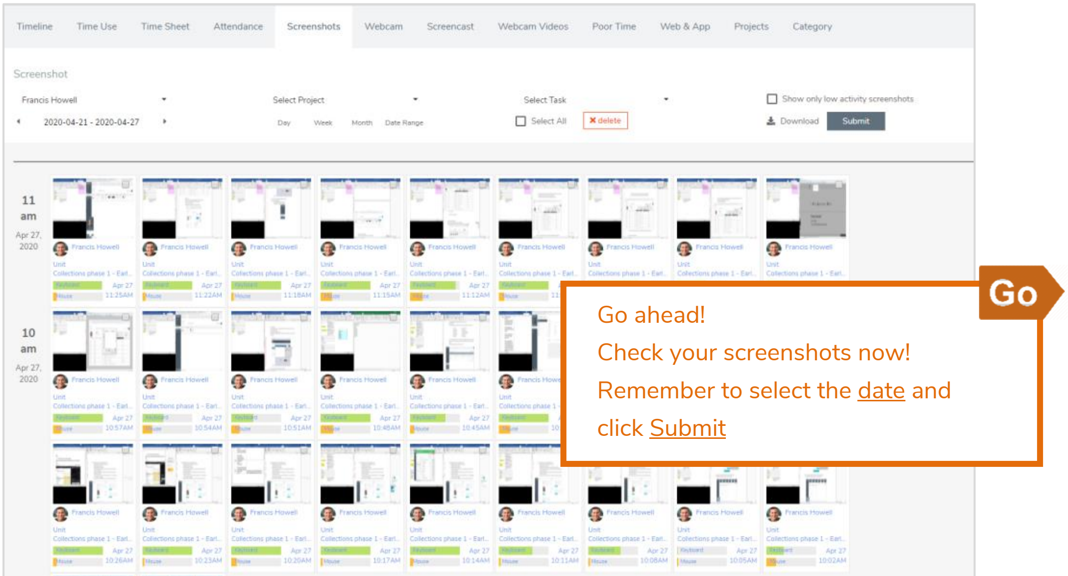


7. Great! We´ve seen how the time tracking reports work
   Now let´s check our own report!
   Go back to your web client to check out the results of the time tracking.
   Remember to focus on the three reports: Time Tracking, Screenshots, and Task Summary.

8. Are you back? Ok! Let's continue. By this time is probably fine to **stop the desktop app** from tracking the Demo Task, or you can leave it running to continue testing the system as your ay goes by.
9. Now, let's see the recorded screenshots.
   a. Without leaving the Time Tracking sub-module, let´s click on the **Screenshots tab**. Here, we can:
      - Filter the shown screenshots by user, project, task, and date range
      - Activate *Show Only Low Activity Screenshot* s to see what the user has been doing during their low activity lapses
      - See and download the screenshots taken during the user's active tracking periods
   b. For now, it's only necessary to **select the correct date range**, which should include today's date to show the screenshots for the activity we've been tracking

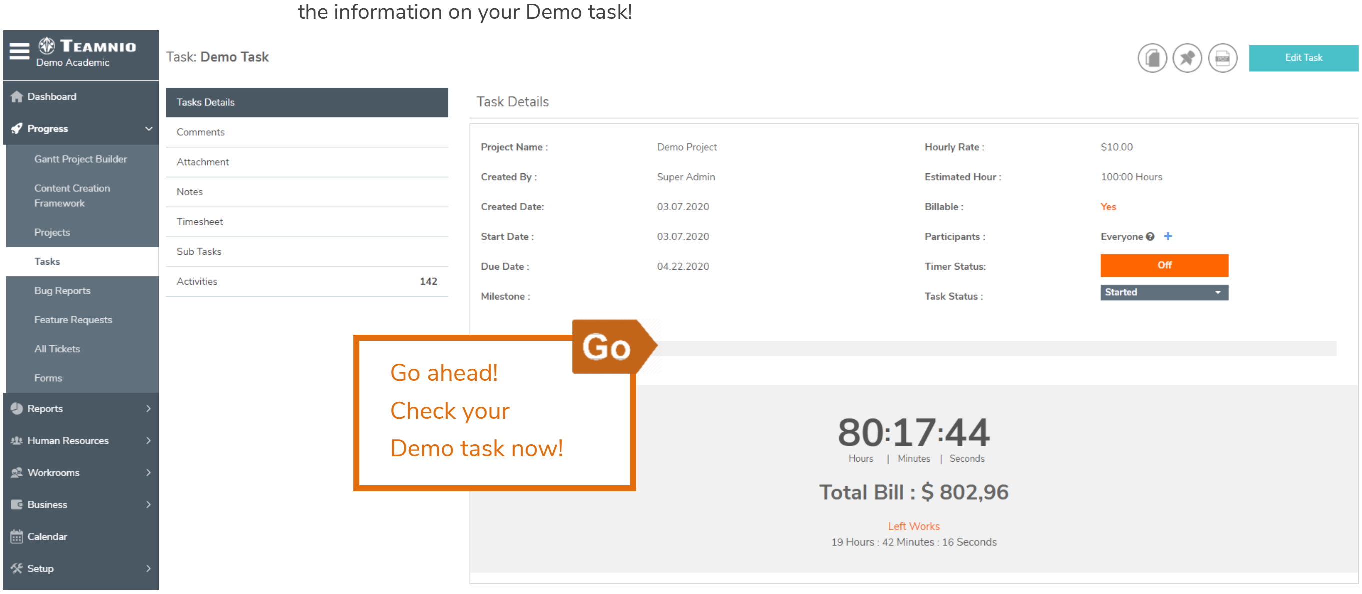
Note that we´re skipping the Attendance tab because we haven´t set up any schedules yet. For more information on this and the other tabs we're not exploring on this Quick Start Guide, please refer to Teamnio's User Manual

c. To confirm and show the report, click ***Submit***



10. To finish with the tests, let´s see the task's summary data.
    a. In the ***Progress* module, click on *Tasks***. From the list, **select *Demo Task***
       The tracked activity has been logged and it's available from the 7 buttons below the task's name.
    b. By selecting ***Task Details***, the system shows a summary including the total tracked time for this task and the billable information that has been generated, according to the internal configuration of the task

       The example below shows a Demo Task that has been tracked for testing purposes by several users. Check out the information on your Demo task!



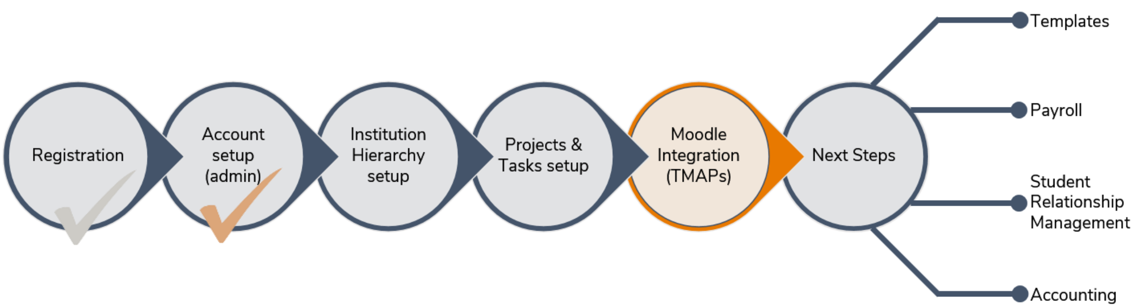
2.2.2.2. Mac installation considerations

The installer steps for mac require to set up the security preferences to grant permission for Teamnio's tracking features.

1. Download and open the Teamnio installer
2. Drag Teamnio to Apps
3. Go to the dock and double click on Teamnio
    a. If the system states that the app can´t be opened:
        i. Click "Cancel" to avoid the OS from deleting the app
        ii. Go to System Preferences > Security and Privacy > General
        iii. Under "Allow downloaded apps from", click on "Open anyway" and confirm the popup message
    b. Otherwise, continue to the next step
4. Open Teamnio again and enter the Organization ID, as well as the username/password
5. The Accessibility popup will ask to set up an exception. Click "Open System Preferences"
6. On the Preferences screen, unlock the padlock and enable Teamnio.
7. Open Teamnio again
8. Continue to use Teamnio. Repeat steps 5 to 7 when prompted by the OS. They have to be repeated to grant permission the first time each of these categories:
    a. System Preferences > Security and Privacy > Input Monitoring
    b. System Preferences > Security and Privacy > Camera
    c. System Preferences > Security and Privacy > Screen Recording

2.3. That's a wrap!

Now that we have tested the time tracking and progress modules, we can continue setting up Teamnio, starting with the structure of the organization within the Hierarchy module.



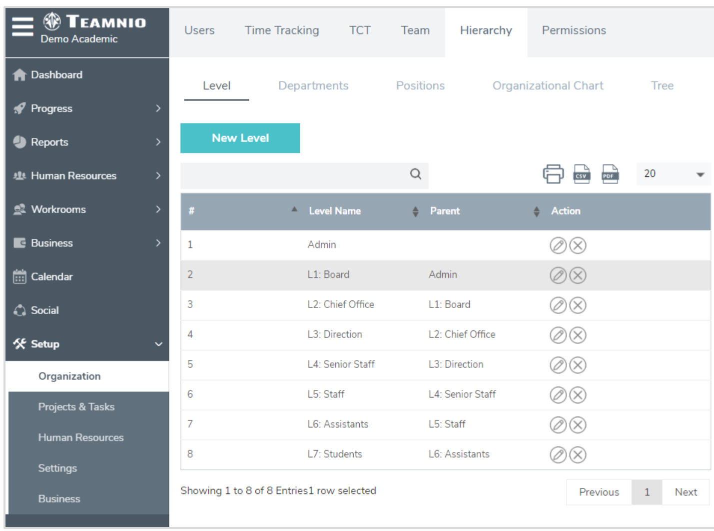
Step 3: Company Hierarchy

Let's create a customized hierarchy to reflect the structure of our organization. Once we´ve done that, all the users will have access to the exact modules and data they need.

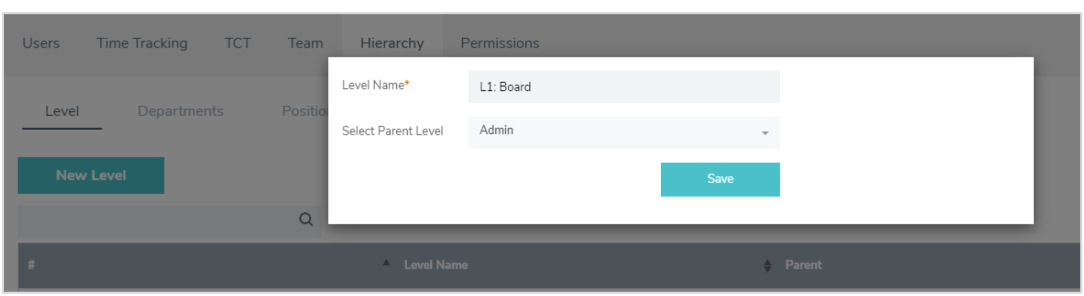
3.1. Levels setup (ACL)

First, we set up the "Levels" to establish user access to the data within Teamnio's modules.

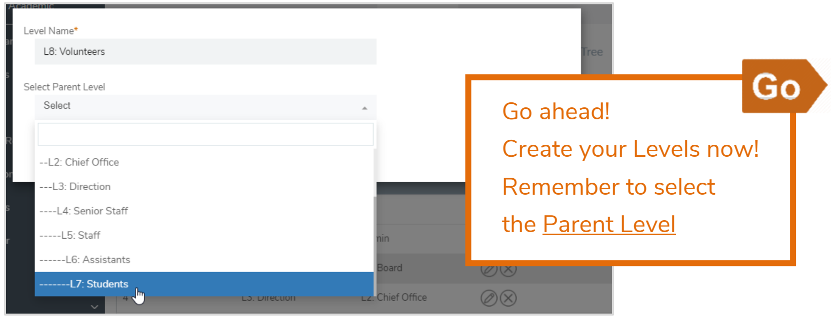
1. In the web app, let's go to ***Setup***, click ***Organization*** and access the ***Hierarchy tab***
   In this example, there are several levels already created.
   These levels are a representation of the organization's hierarchy. In the image below, we have seven levels and each one has a parent. The Admin is the highest level because it has full access to all of Teamnio's modules.
   For instance, Level 1 could include the board members, then Level 2 would be used for high-level positions like the President.



2. Let's create our first level
   a. **Click New Level**
      A level contains two pieces of data: its name and its parent level.
   b. Let's **name it** "L1: Board" or whichever name matches our organization
   c. Then, **select Admin as its Parent and click Save**. That's all there is to it!



3. Now, let's **create more levels** to reflect our institution's structure. It's important to select a parent each time.
   As we go further down the hierarchy, the system will add dashes to reflect the level.
   For instance, the image below shows two dashes for level two, three dashes for level three, and so forth.

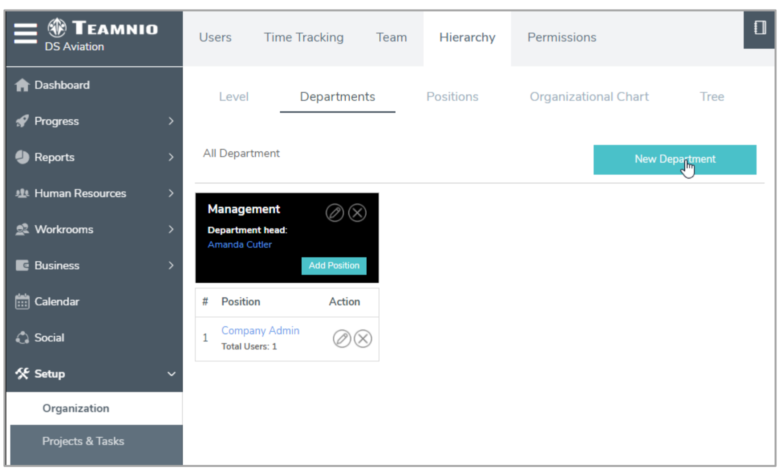


By repeating this process, we can create any hierarchy that fits the structure of our organization. Levels establish the broadest terms for that structure. Next up, we'll create the organization's departments and positions.

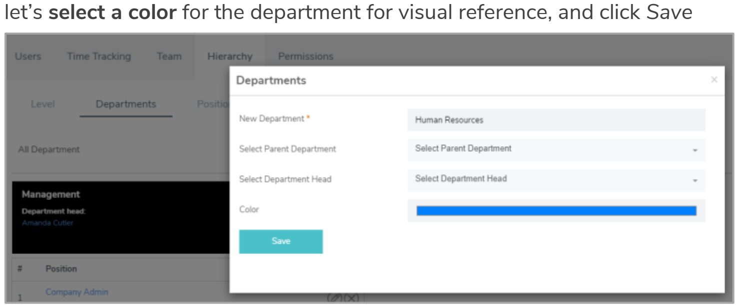
3.2. Departments setup

Departments represent the organization's structure within Teamnio. Every department is related to a parent department and contains several positions. Hence, the purpose of the departments is to group and separate the organization's positions.
Let's set up our first department.

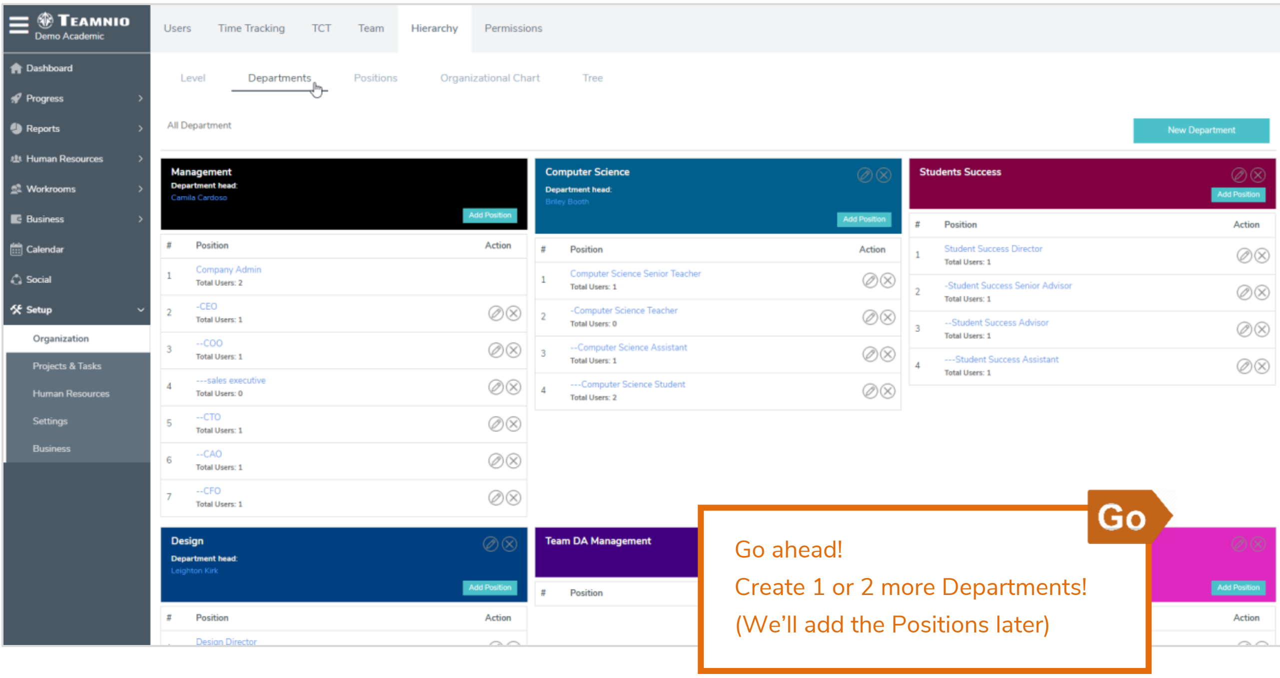
1. In the **Setup** module, click ***Organization*** and access the ***Hierarchy*** tab
2. Now, let's open the ***Departments* section**. Here we have the Management Department, which contains the Company Admin position



3. **Click on New *Department***
   a. Let's **name this one Human Resources**. This is the only required field.
   b. We could select a <u>Parent Department and a Department Head</u>, but for now, let´s **leave them blank**. We can always come back to edit this later.
   c. Finally, let's **select a color** for the department for visual reference, and click Save



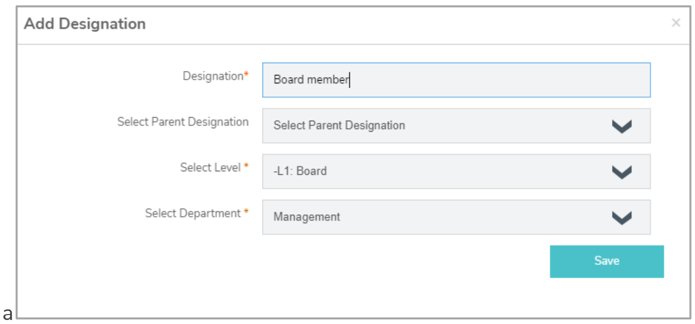
4. Now, let's **create a couple of other departments** that fit our institution's structure.
   Just create one or two to get familiar with the functions. You´ll have time to create the whole structure later.
   In the example below, there are several departments already created, and each of them contains several positions, which is the next step!



3.3. Positions setup

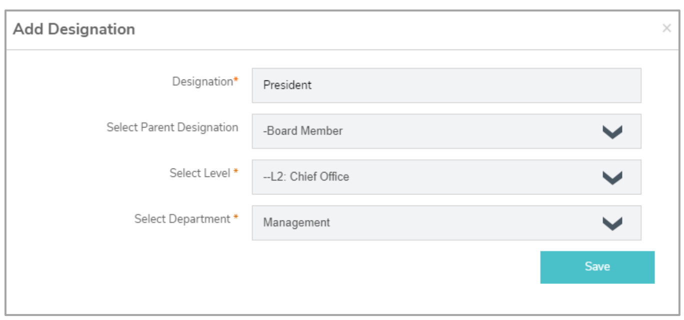
To start adding people to Teamnio, we first need to create functional profiles for them, which are called *Positions* or *Designations*.

1. Let's go back to the **Departments section** and create a couple of positions
    a. In the <u>Management department</u>, click on ***Add Position***.
    b. Let's **name the position "Board Member".** The <u>Parent Position is not required</u> so we´ll leave it blank
    c. Now, let´s assign this position to Level 1.
    d. The department is already selected, so let's **click Save**

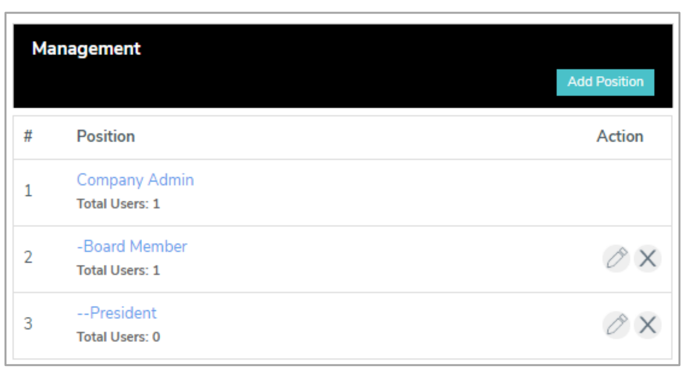


a

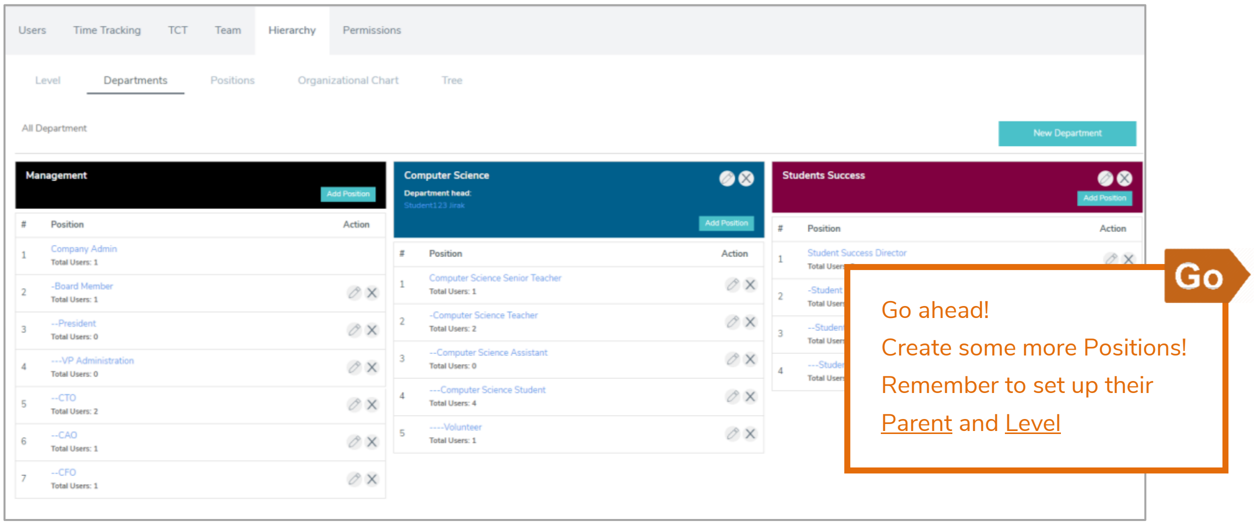
    e. Ok! Let's **create a second position** within the management department and **name it "President"**
    f. Select the **Board Member as the Parent Designation**. This means that the President position will have a child link to the Board Member position
    g. This will be a **Level 2 position** within the **Management department**.
    h. To confirm, **click Save**



2. As a result, both positions are shown within the department and the dashed lines show their respective level

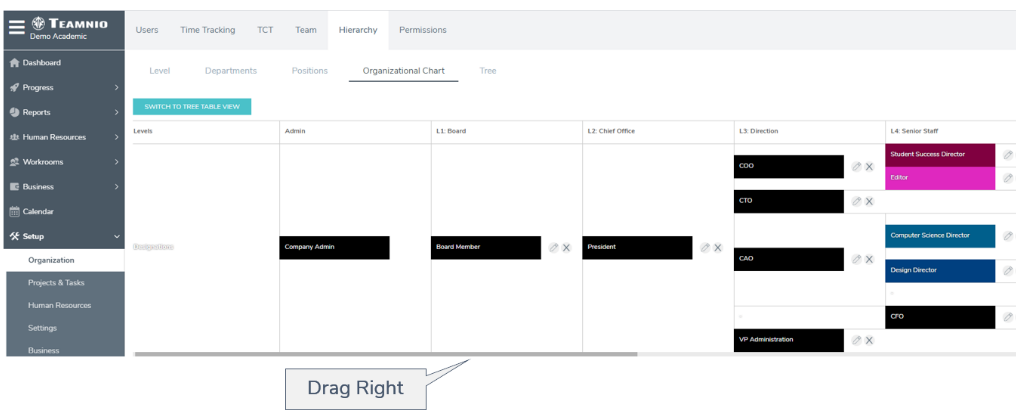


3. If we **continue adding positions**, we'll get a result similar to the image below, with positions grouped by department and organized via their Parent Designation relationship.



By creating some other Departments and Positions we´ll establish a customized structure.

4. We can even <u>visualize the result</u> by clicking on the sections called ***Organizational Chart*** or ***Tree***
   a. The chart shows the level, department, and position relationships from left to right, and



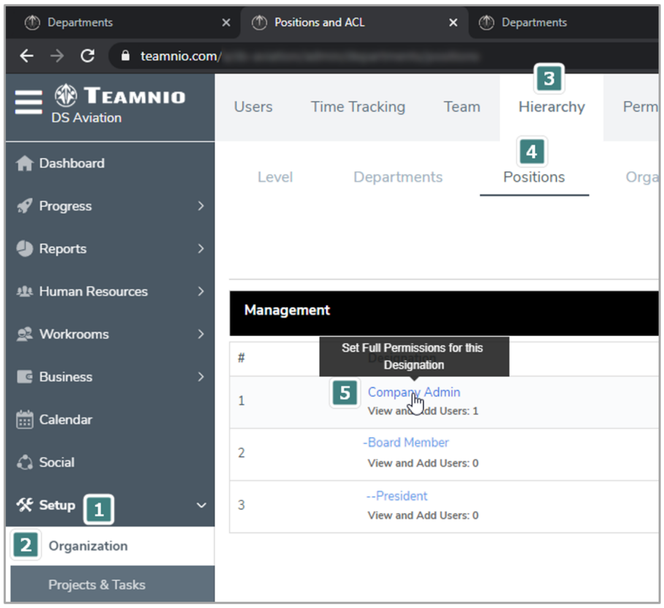
   b. The Tree shows them from top to bottom

The next step is to configure the positions to grant them access to Teamnio's modules.

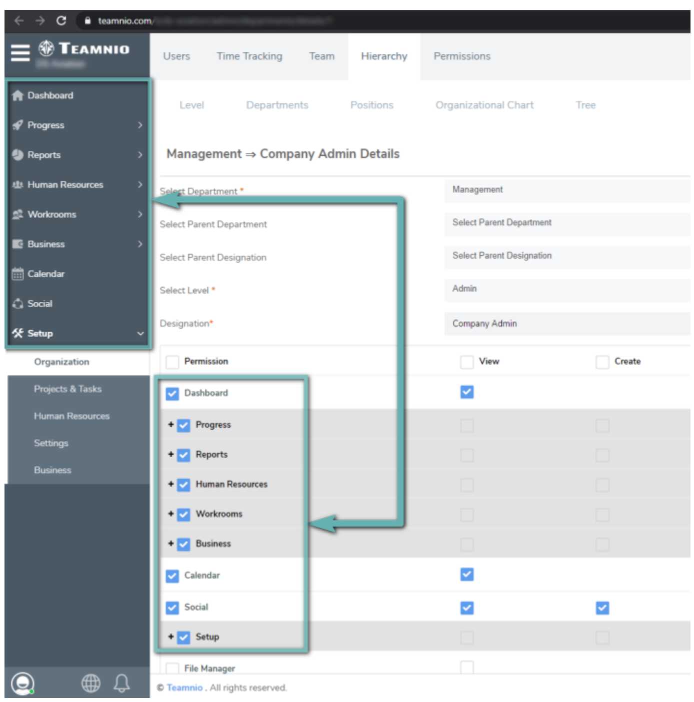
3.4. Position permissions setup

Positions grant access to Teamnio's modules. Any user assigned to a position will inherit the position's access permissions. Let's see how this works

1. First, go to ***Setup, Organization***
2. Click ***Hierarchy*** to access the **Positions** section, and **click on the Company Admin position**

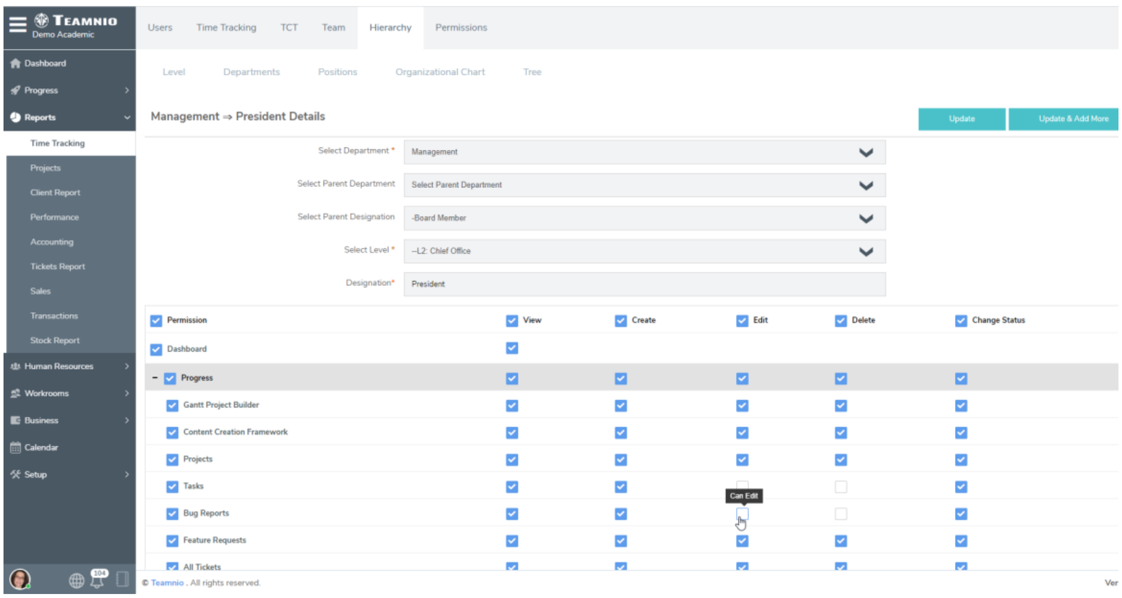


3. This screen shows the position's permissions.
   Every item on the *Permission* column reflects the modules available in the navigation panel to the left.
   These checkboxes determine which modules will be available in a given position.
   As we can see, the Company Admin position can access all of the modules.

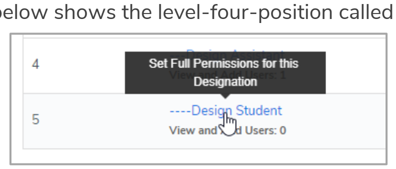


4. Let's **modify the permissions** of the President.
   Since it´s a high-level position, it should be able to access most of Teamnio's modules.
   a. To begin, **click the President position**

   This is the default status of a new position, but the CEO requires to access most modules.
   b. Click on the ***Permission* checkbox** to activate all permissions for this position. This way, any user assigned to the President position will have full access to the modules, including the ability to *View*, *Create*, *Edit*, *Delete*, and *Change Status*.
   c. Let's **expand the *Progress* module**. Given the executive perspective of the CEO position, maybe we don´t want it to Edit and Delete tasks or bug reports, so let's **uncheck those boxes**.
   d. Finally, **click Update** to confirm the changes



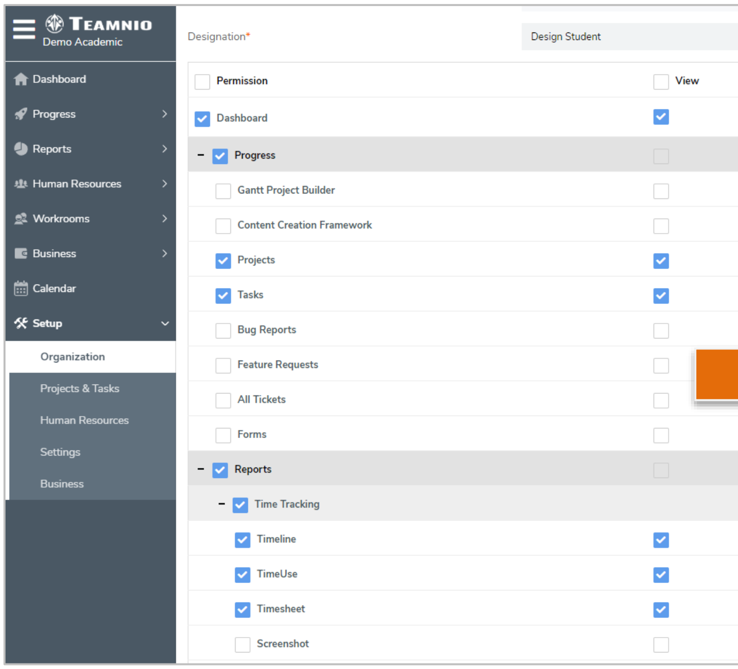
5. Now, let's **edit the permissions of a low-level position** from the ones we created before. In principle, this kind of position should have basic view-only access.
   a. Let's find a low-level position within any department and **click on it.**
   For instance, the image below shows the level-four-position called *Design Student*



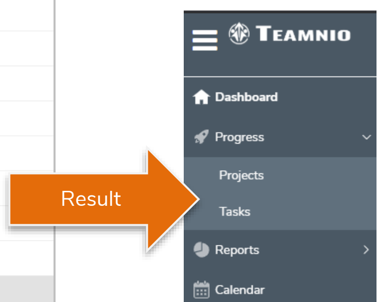
   b. For this position, let's **expand** the categories called ***Progress and Report***

c. We should **activate permissions on the View column** according to the following image, and click *Update* to confirm. The categories are self-explanatory:

- To track time on the desktop app, a position needs to be assigned to **Projects and Tasks items within the *Progress* category**
- Aside from that, we can enable the permission to view several reports; for instance, the ones related to ***Time Tracking***

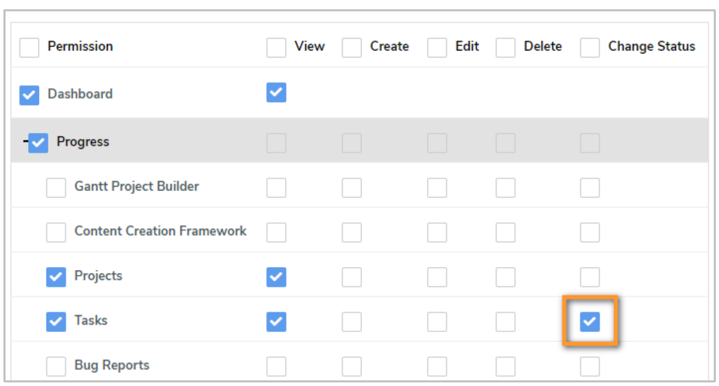


Web app on user's account*



* User gets acess to these Teamnio modules when they are assigned to a position with the permissions set up as the image to the left

d. Next, **activate Change Status permissions** on the **Progress Task** row. This is necessary for the lower-level users to be able to check the *Completed* box on the desktop app.



e. Finally, **click Update** to confirm the changes

Go

6. Done! Continue setting up the organization by setting up the permissions for the rest of the positions created before
   Remember to consider the modules you want each position to be able to access, according to their Level and Parent Designation relationships.
   - Upper-level positions should have access to view, edit, delete and change status
   - Lower-level positions should have view-only access over projects, tasks and time tracking, as well as change status permission for tasks

Now, all that is left, is to **create the users** and assign them to the available positions

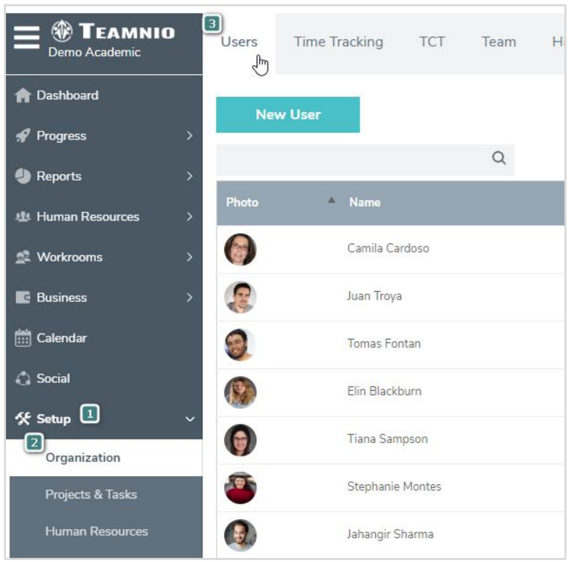
3.5. User management

User management consists of three stages: add users, activate them, and assign them to positions.
There are two ways to add users: internally (*Organization* module) and externally (through the website).
Let's see both methods in action.

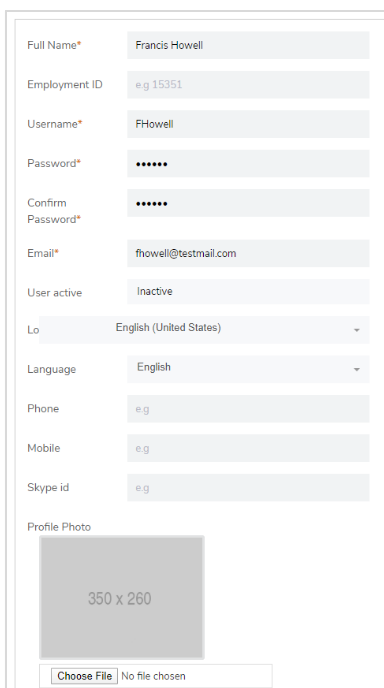
3.5.1. Internal user creation

Let's access the user management module.

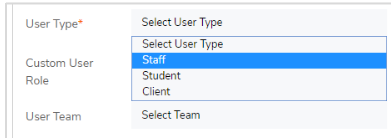
1. Go to **Setup** *and* click on ***Organization***
2. Here, the **Users tab** contains the list of users, where we can click the Edit button on any existing user to modify their username, password, contact information, position, and time tracking settings. All of which we will see in a moment when we create a new user.



3. Let's **click on New User** to add one
   There are over <u>30 fields</u> here, but <u>only a few are required</u> (marked with an asterisk). Let's focus on those.
4. First, we **fill the collaborator's details**: <u>name, username, password, and e-mail</u>. The rest of them are optional, but it's highly recommended to <u>upload a photo</u>.

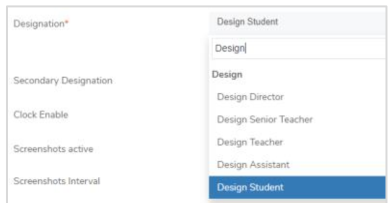


5. The next required field is the ***User Type***. Let's Select **Student.** Notice that this is the field where the users are set as Staff, which is useful for instructors, and other non-student members of the organization.

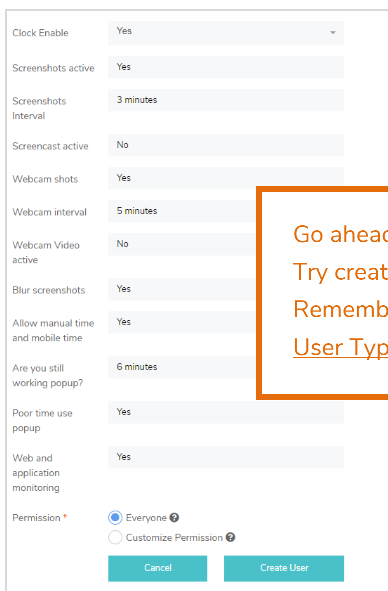


This action enables the possibility to assign the user to a position at once.

6. In the ***Designation*** field, let's search and **select the low-level position we edited before,** which in this case, is an example of how to set up a student user.
   This is the position assignment, and it is crucial because it will provide the user with the permissions previously set up for the assigned position. For more about user assignment, refer to section 3.5.4.



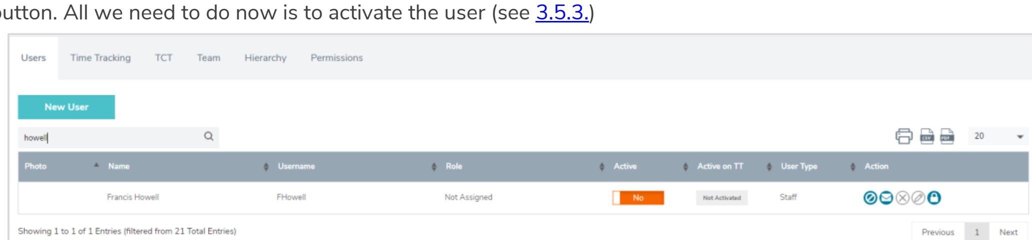
7. The rest of the fields are not required, so for this basic guide, we will **leave them unchanged**.
8. The second-to-last action for creating a new user is to set up their 12 Time Tracking settings, which start from *Clock Enable* and go all the way down to *Web and Application Monitoring.*
   The default values function properly for most users, but we should pay attention to *Clock Enable*. This one should be activated for collaborators who are paid fixed salaries.
9. The final setting is called ***Permissions*** and it should be **set to *Everyone*** for now.
10. To proceed, **click on *Create User***



Go

Go ahead!
Try creating a user.
Remember to set the User Type to "Staff"

11. The result is a new user on the list, which we can confirm by typing their last name on the search box below the *New User* button. All we need to do now is to activate the user (see 3.5.3.)

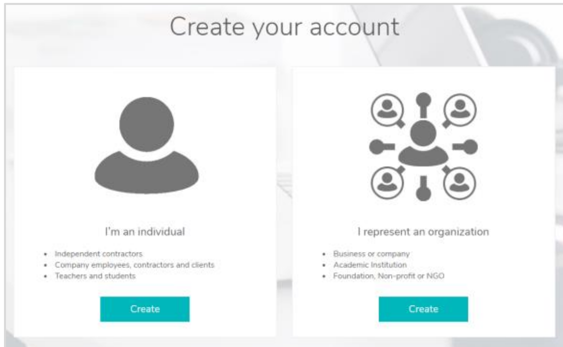


Creating new users can be a little slow. This process can be streamlined by asking each user to create their own account. Continue to section 3.5.2. for more details

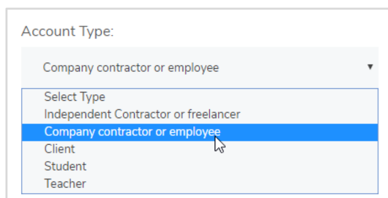
3.5.2. External user creation

Creating users one by one requires a lot of time. Let's save it by asking people to create their own accounts.

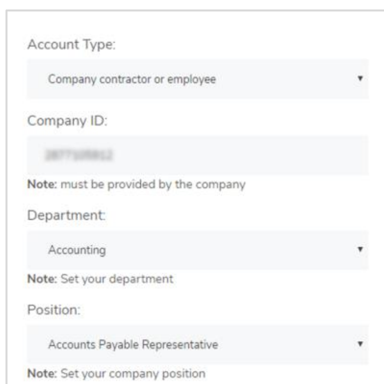
1. First, we have to **provide users with three pieces of information**:
   a. Their assigned **department and position**. This is not necessary for student users, as we´ll see in a moment.
   b. Our **Company ID** (the License ID we received via e-mail after completing the registration), and
   c. The following **link:** https://teamnio.com/en/create-account
2. The link will lead them to the "*Create your Account*" page, where they have to **click Create under "*I´m an individual*"**



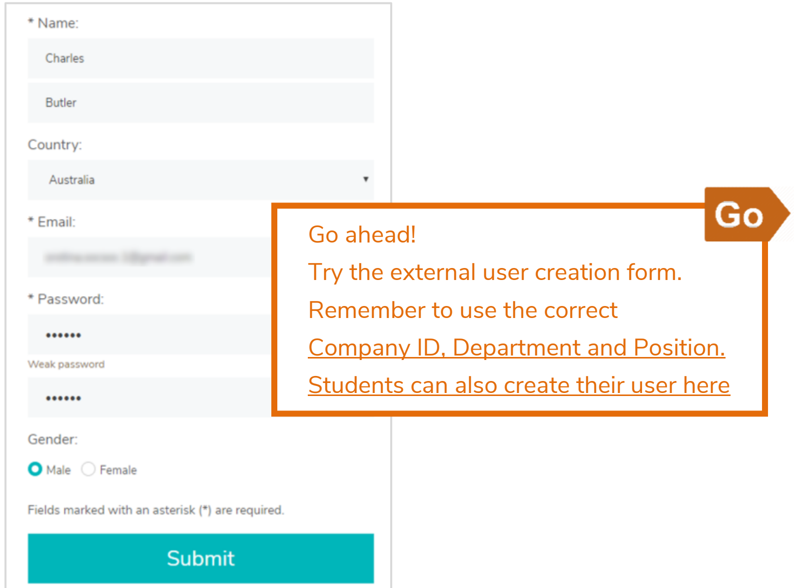
3. On the following page, they should click the **Account Type** dropdown and make their selection. Here, a student could also create their user, but let's see another path. ***Select Company Contractor or Employee***



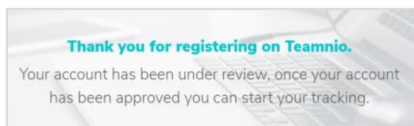
4. After that, they must continue **filling the form**, starting with the company ID and their position, which we provided them at the beginning of this process. The user account is automatically assigned to the position's permissions. For more information about permissions, refer to section 3.5.4.



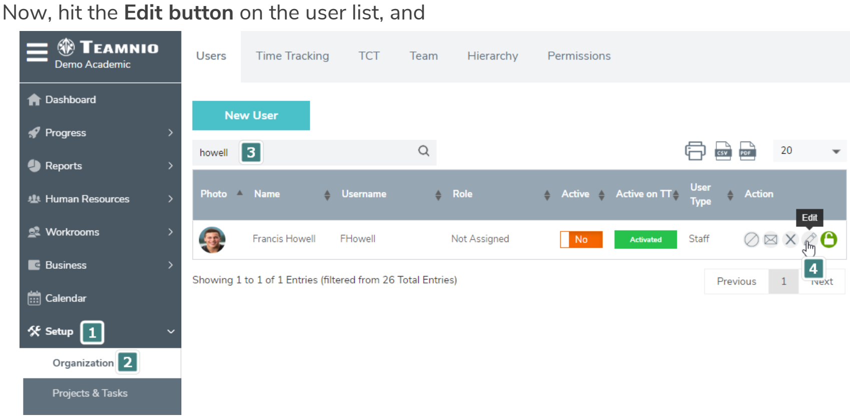
5. To finish, they must **fill the rest of their details and press** the ***Submit*** button



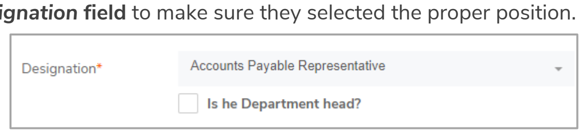
6. This creates the account with an inactive status, pending activation from the organization's administrator



7. Now we´re up! Let's verify that the user entered the information properly
    a. Go to **Setup > Organization** and **search** for the user. Note that the *Active* column shows "No", which means the user is inactive
    b. Now, hit the **Edit button** on the user list, and



    c. **Verify the *Designation* field** to make sure they selected the proper position.



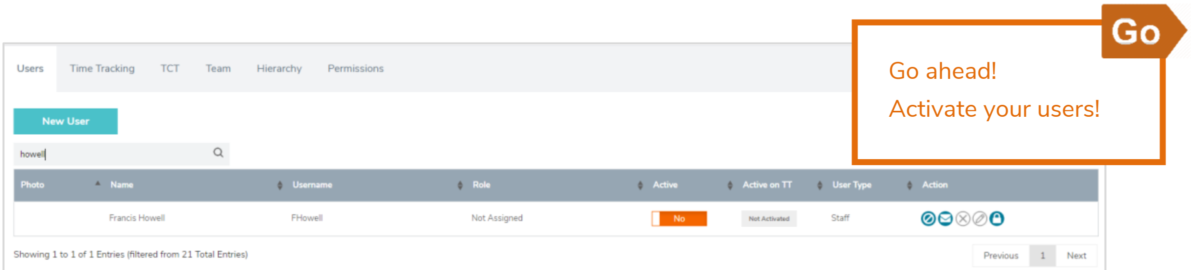
    d. Otherwise, make the necessary changes and **click *Update User***

After that, we can proceed to activate the account (see 3.5.3.)

3.5.3. User activation

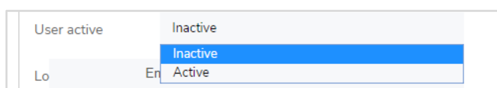
By default, new users are created with an *Inactive* status. When users are created externally their settings must be checked, especially their position assignment because this grants them access to specific modules within Teamnio.

The activation status can be changed in the *Users* section (Setup > Organization) by **clicking the No button under the *Active* column**.



As a result, the field will show as "Yes", which enables the user to start using Teamnio's tracking functions.

This parameter is also available inside the **New User** or **Edit User** screens.
Just go to ***User Active* dropdown** to select "***Active***" and scroll down to hit ***Update User***

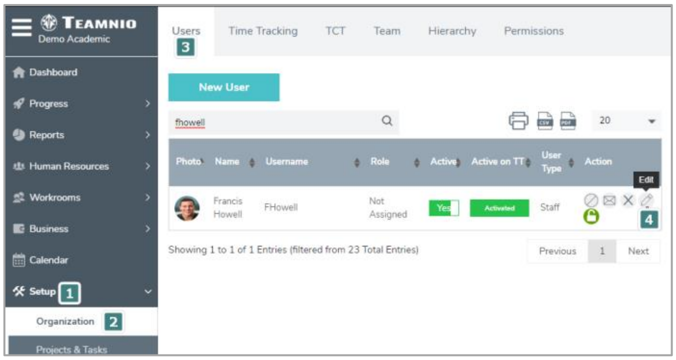


Now that we've created and activated two new users (one internally and one externally), we can finish the set-up process by assigning them to a position.

3.5.4. User assignment to positions

Through their assigned position, users gain access to Teamnio's modules. Let's see a few **ways to assign a user to a position**.

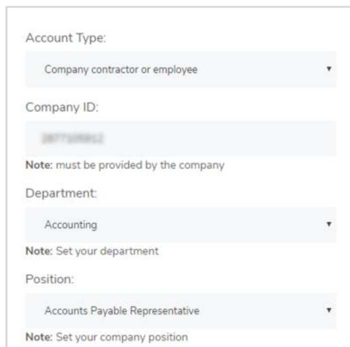
- Access the **Edit User screen** (*Setup > Organization > Users > Edit*).
  Once inside, **click on *Designation*** and **assign the user to a position**.



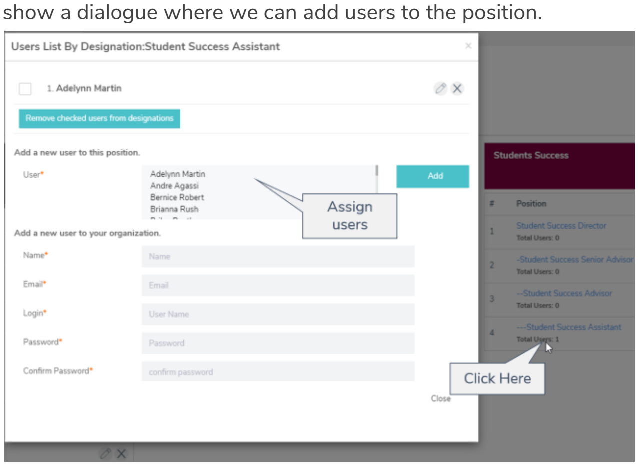
Go

Go ahead!
Assign a few users to different positions
Its required that some positions already exist

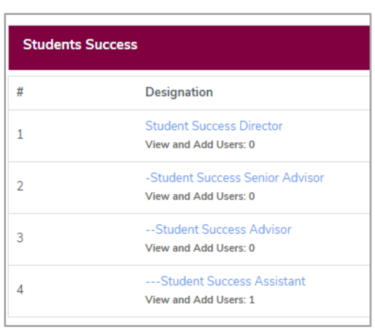
- Another method is the **external user creation form.** It also contains the *Department* and *Position* fields (see section 3.5.2.)



- The **Departments section** (Setup > Organization > Hierarchy) includes a button under each position, called ***Total Users***. Clicking on it will show a dialogue where we can add users to the position.



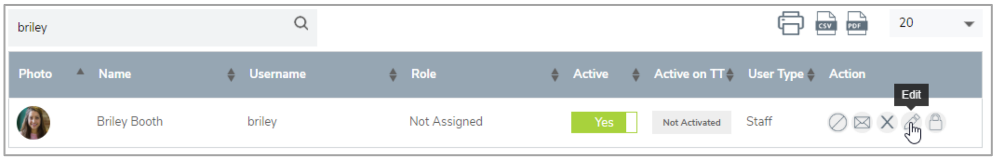
- The same dialogue is available in the **Positions section** (Setup > Organization > Hierarchy)
  To access it, just click ***View and Add Users***



3.5.5. Dummy user management

For testing purposes, we might need to create a couple of dummy student users within Teamnio
To do this, we first have to follow the Internal User Creation procedure (3.5.1.) and the Activation procedure (3.5.3.)
After that, we can perform dummy user management through these steps:

1. Go to ***Setup > Organization*** and click the ***Users tab***
2. In the users' list, use the **search field to find the desired user**
3. Click the ***Edit User button*** from the user



4. On the edit user screen, you can update the user's details, including their username and password.

3.6. Relationship between modules and data

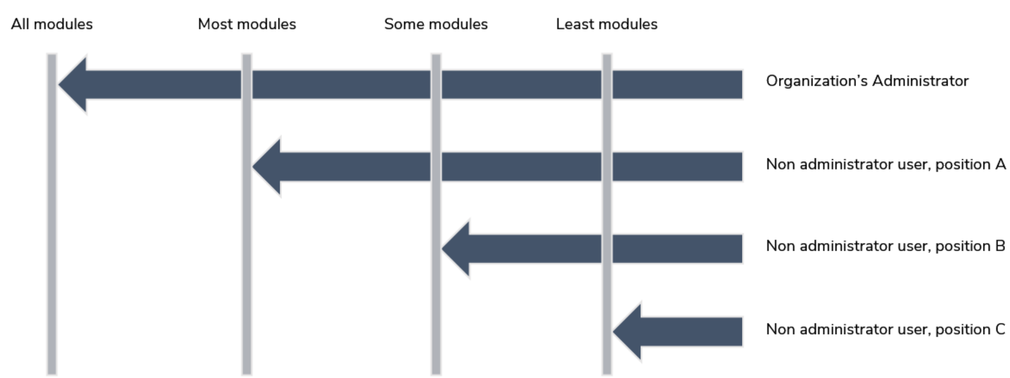
This explanation is non-vital to continue setting up Teamnio. If you prefer, you can **skip** to section 4.

Let's wrap up this Hierarchy configuration stage by analyzing two important concepts that will help you set up your organization and get ready to dive into Projects and Tasks.

By setting up Levels, Departments, Positions, Permissions, and Users, we've developed a basic understanding of Teamnio's Hierarchy functionality. This functionality has two main objectives: module-related and data-related.

3.6.1. Module-related objective

The first objective is module-related. We want non-administrative users to have restricted access to Teamnio's modules.

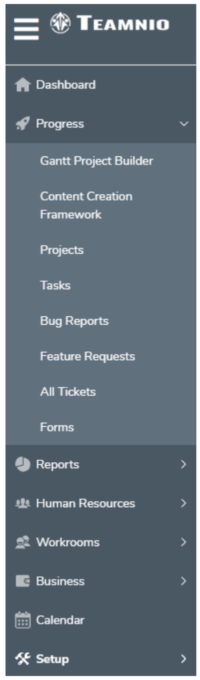


We achieved this by:

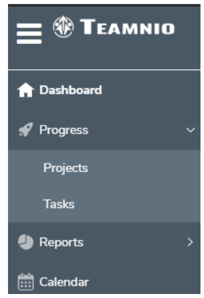
- Establishing a hierarchy with Levels (3.1.), Departments (3.2), and Positions (3.3),
- Setting up permissions for the positions (section 3.4.), and finally
- Assigning users to those positions (section 3.5.4.)

For instance, we set up the position called President to access all of Teamnio's modules, while restricting a student to only access the *Progress* and the *Reports* modules. This was an example of how to set up upper-level and lower-level positions, which reflects in their web apps:

President Position

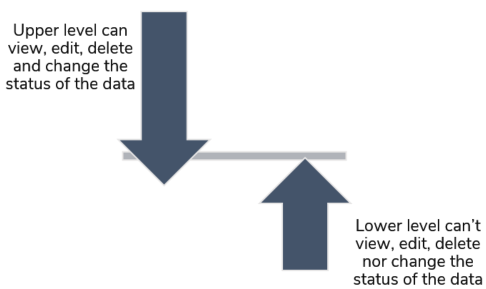


Student Position

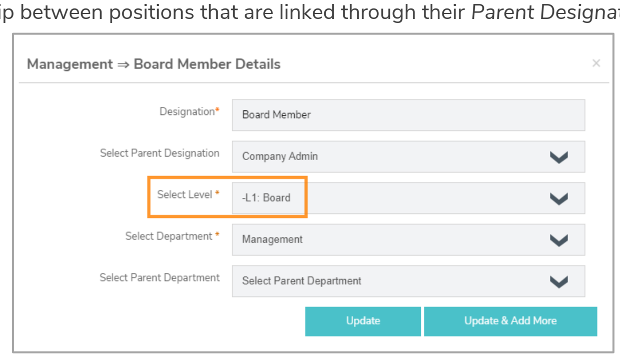


3.6.2. Data-related objective

The second objective is data-related. We want upper-level users to be able to view, edit, delete, or change the status of the data contained in every module that their subordinates can access.



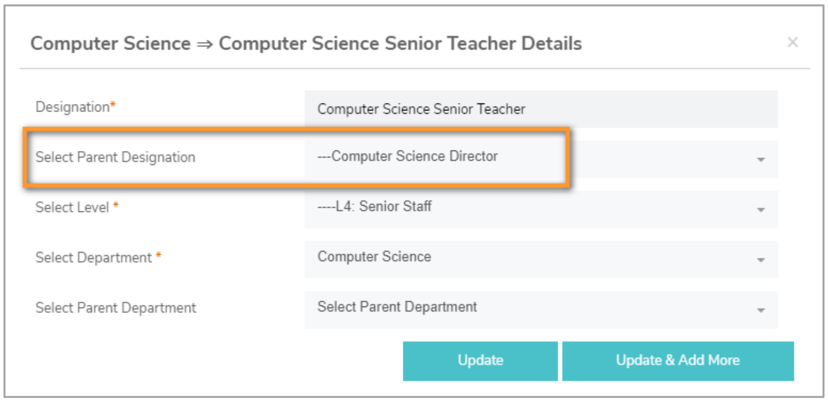
We achieved this by creating items in the Levels section (see 3.1). These levels affect all the positions automatically. The position's level establishes a relationship between positions that are linked through their *Parent Designation* parameter.



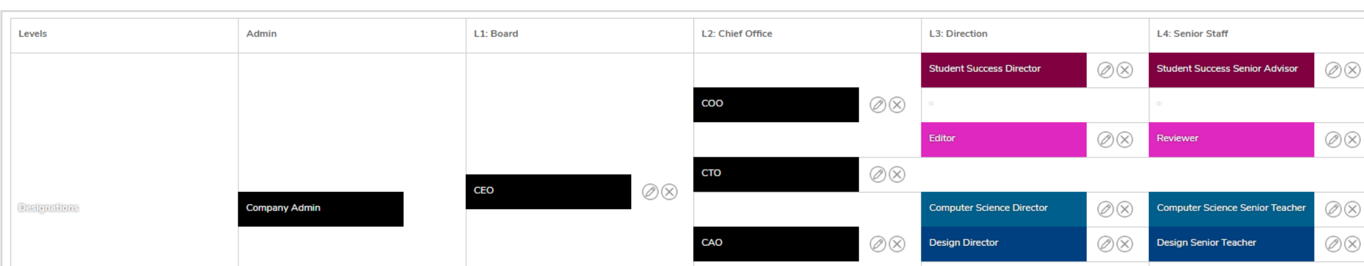
Simply put:

- Level 1 positions can see, edit, delete, and change everything on Level 2 positions.
- Level 2 positions can see, edit, delete and change everything on Level 3 positions but can´t modify anything on Level 1 positions
- Level 3 positions can see, edit, delete and change everything on Level 4 positions, but can´t modify anything on Level 1 and Level 2 positions
- And so on.

For instance, in the Organizational Chart below, the Computer Science Senior teacher is a level 4 position and the Computer Science Director is a level 3 position. The latter has access to the data of the former.

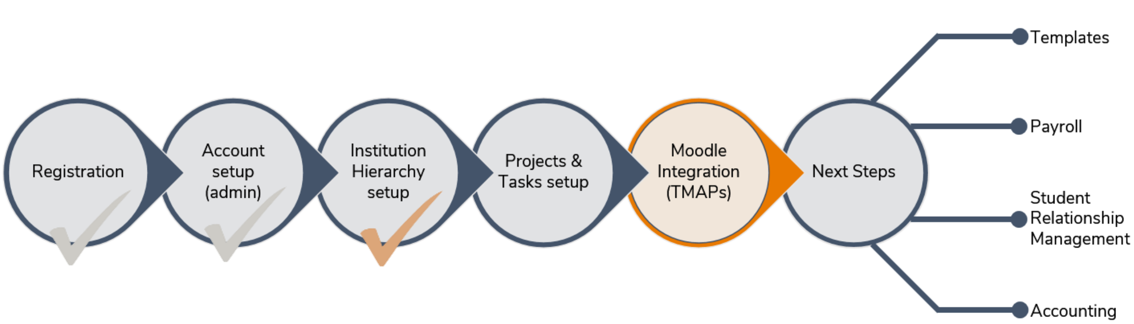


The Organizational Chart view shows the level relationship from left to right, which defines data access between positions with parent-child relationships
(like the ones from the example above)



3.7. We made it!

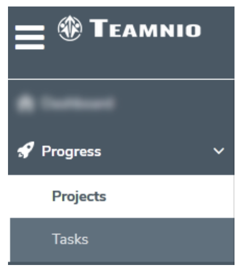
Now that we understand the Hierarchy functions, we can proceed to experiment with [Projects and Tasks]!



Step 4: Projects and tasks

4.1. P&T Overview

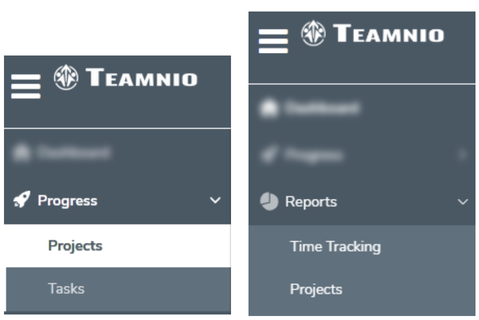
Let's set up a simple project with a few tasks. This is done in the Projects and Tasks sub-modules, which are located within the *Progress* module.



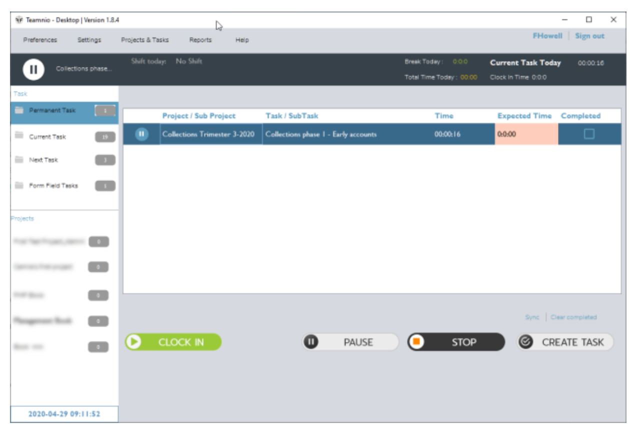
Teamnio offers two points of view to tackle any teamwork, related to management and operations:

- The management perspective allows upper-level users and clients to oversee the project through the *Progress* and the *Reports* modules inside the web app, whereas
- The operations perspective allows lower-level users (i.e. students) to focus on their immediate daily priorities through the desktop app

Management perspective



Operations perspective



4.1. Project creation example

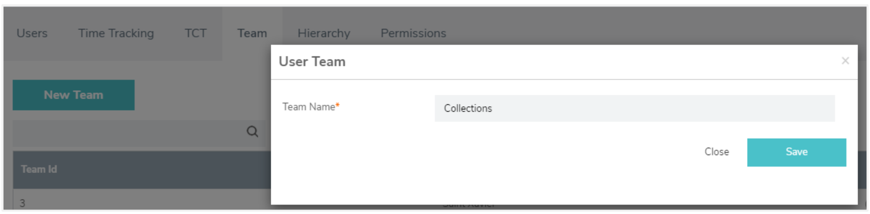
Teamnio's projects can be used for a variety of applications, from tracking student activity on courses, to coordinating academic efforts or administrative endeavors. The most powerful features related to student activity tracking can be set up automatically through T-MAPs (section 5). For now, we'll take a look at a simple example, just to get a grasp of how the system works.

Let's **create a small project**. To do this, we first need to identify the team members that we will assign to it.

4.1.1. Team setup

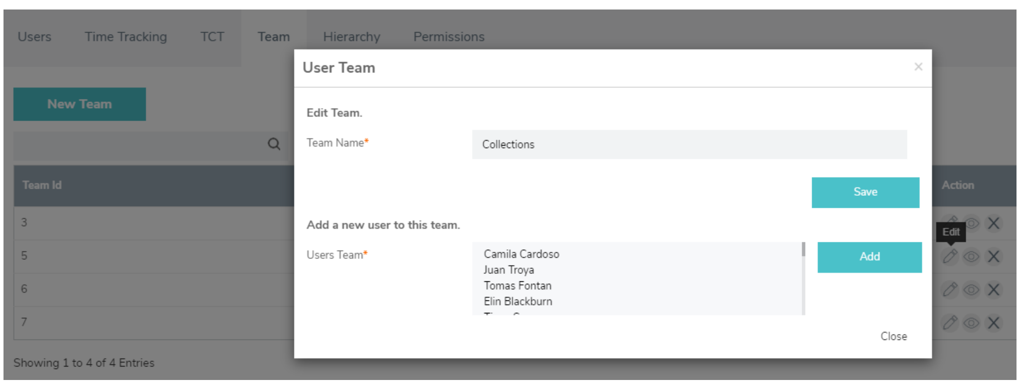
We're going to form a small team for the project. To do that, we just need to create the team and assign the users to it.

1. In ***Setup*, click on *Organization*** and go to the **Team tab**
2. Click **New Team, name it "Collections" and click Save**

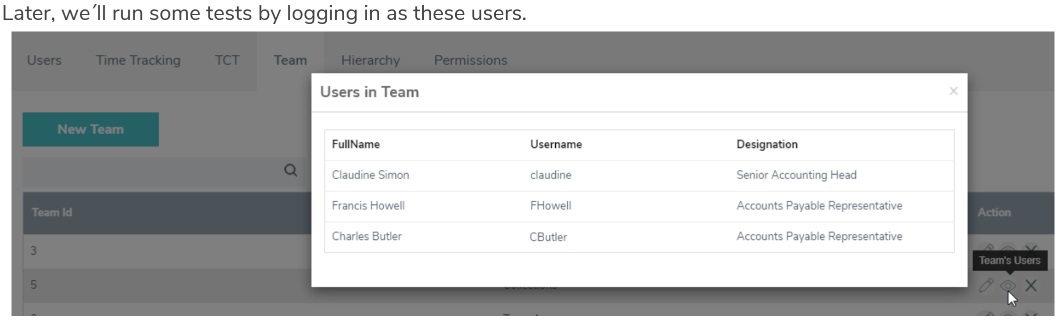


Now, let's assign the team members to our collections team.

3. **Click the *Edit* button** for the Collections team.
4. In the pop-up dialogue, **select the users** and confirm by hitting **Add.**
   The added users should include both the operations users and the management lead.



5. To confirm our actions, press the **Team's *Users* button** to check the assigned members and their positions.
   Later, we´ll run some tests by logging in as these users.



Go

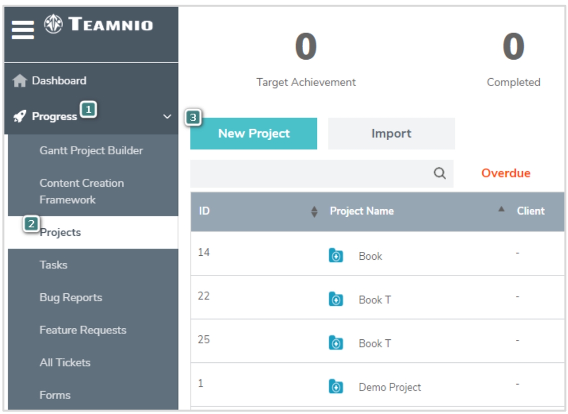
6. Now it's your turn!
   Repeat these steps using your organization's account. Remember to set-up permissions for the positions involved!
   To form the team, we need as a minimum:
   - One high-level position with permissions to the Progress and Reports modules (see 3.4.4.)
   - One low-level position with view-only permissions to the Projects, Task, and Time Tracking submodules (see 3.4.5.)

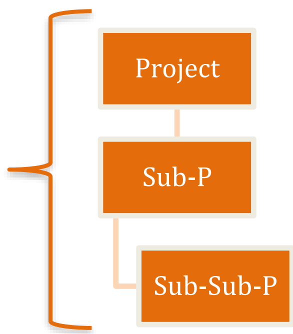
   After creating the team, we´re ready to assign it to a project.

4.1.2. Project setup

Let's create a small project by focusing on the required fields of the project creation form

1. On the left navigation panel, click ***Progress*** and then **Projects**
2. This is the project's section. **Click *New Project*** to create a new one



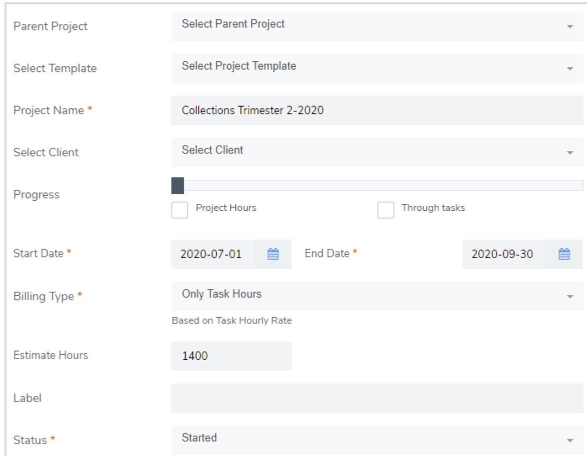


3. **Leave the *Parent Project* field empty**.
   This will be a single-level project, so we won´t select any parent projects for now.

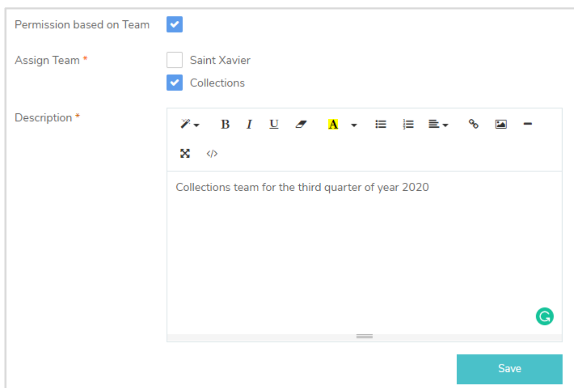
   (Teamnio includes a multi-leveled design to assign projects to parents and create a structure of up to 3 levels: project, sub-project, and sub-sub-project. More on that later.)

4. On the **name field**, type "*Collections Trimester 3-2020*"
5. Now, let´s set up the **date range**.
   The ***Start Date*** should be July 1st and the ***End Date*** should be September 30th
6. Next, go to ***Billing Type*** and **select *Only Task Hours***; and **type 1400** *Estimate Hours* which is the approximate amount for two resources working full time through 13 weeks, including some margin for overtime.

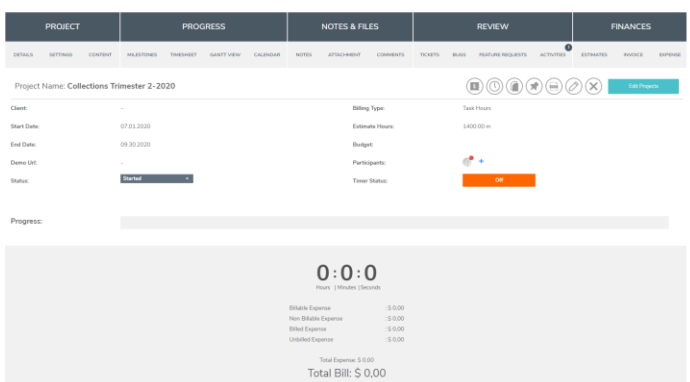
7. The **Status** of the project should be **set to *Started***. Even though we selected a start date in the future, let's just say we will begin to work on collections early.



8. Scrolling down, we have two required settings left.
First, the ***Collaborators* field.** We could select the assigned resources one by one, but instead, we will <u>use our collections team</u>. ***Activate Permission based on Team***, <u>and select the appropriate team</u> from the options shown.
9. The last step to create a project is to **type a description** of it. Let's do that and click Save to confirm.



10. As a result, the newly created project is shown. This is the dashboard of the project, from which the manager will oversee its progress

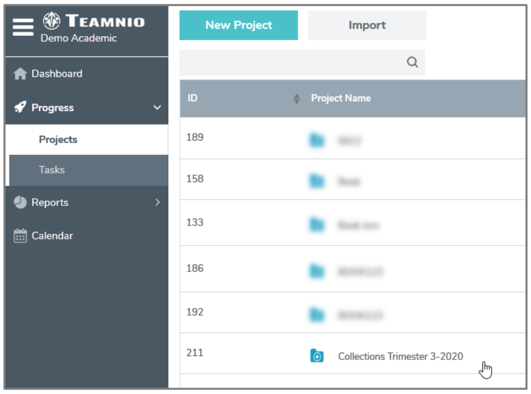


Our project is ready for launch. Now we only need to create its tasks.

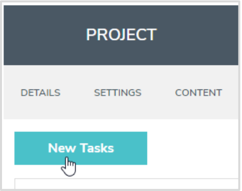
4.1.3. Task creation for a new project

This stage starts from the dashboard of any project

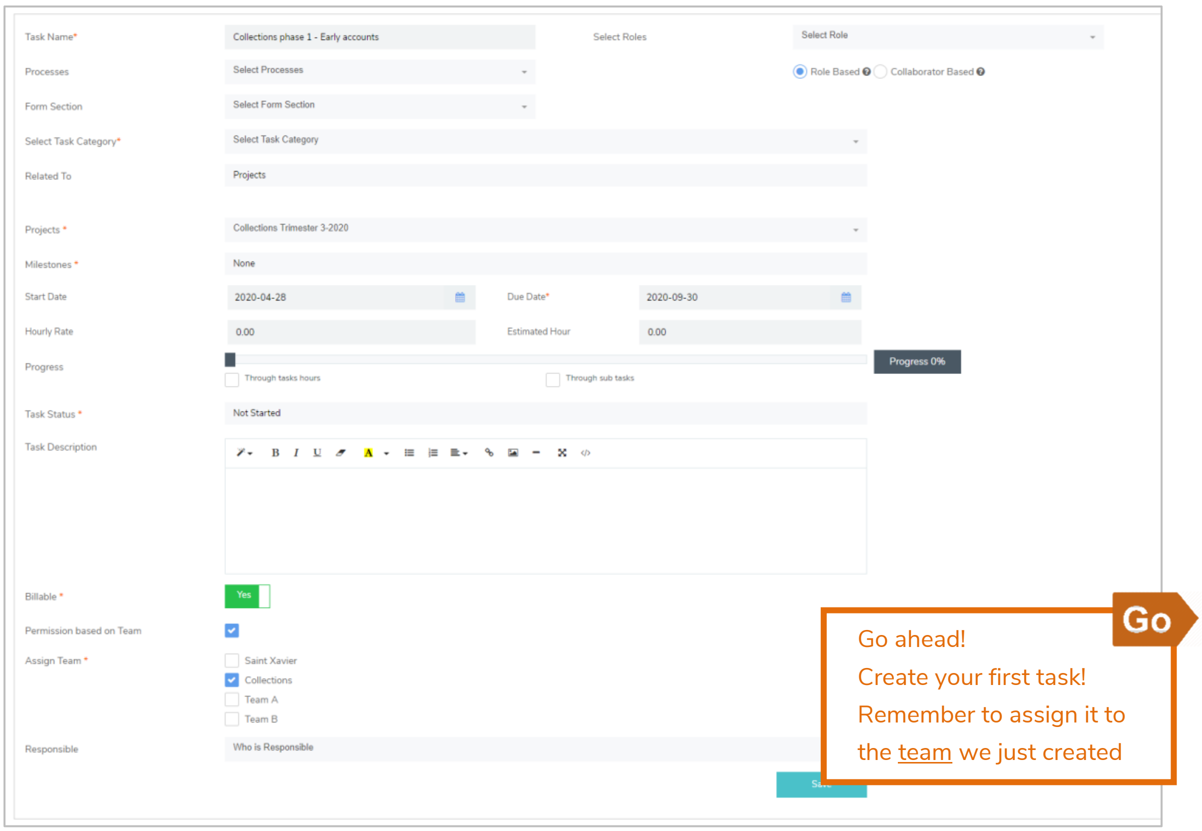
1. Go to the **dashboard of the project** (Progress > Projects > Select project)



2. Now, go to the **Project section**, **click Content**, and click the **New Tasks button**



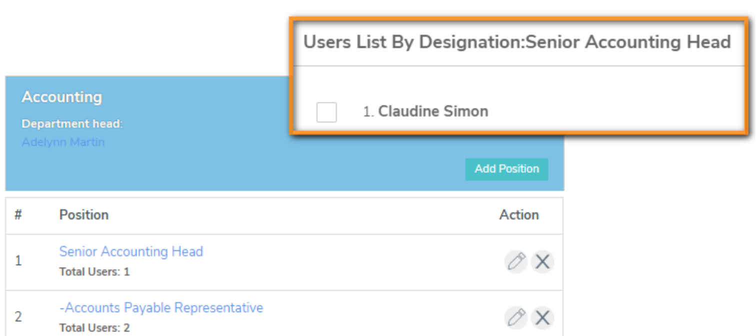
3. This is the task creation screen.
    a. **Type the name** of the task as “Collections phase 1 - Early accounts”
    b. On ***Related To*, select *Projects*, and select the project** name we created before: “Collections Trimester 3-2020”
    c. **Select** the same **due date** that we set up for the project
    d. The ***Billable* field should be activated**
    e. Finally, **assign the collections team** and **click *Save***



4. That’s it! The project’s task is ready to be used for tracking time
   Now, all we have to do is notify the collections team to download and install Teamnio’s desktop app and click on the task to start tracking their work.

4.2. Project reports

The project work is performed by the assigned users and supervised by management. The organization’s hierarchy establishes the chain of command for the assigned projects and tasks.
In our example, the Accounting department head, Claudine Simon, is in charge of the collections project we just created.

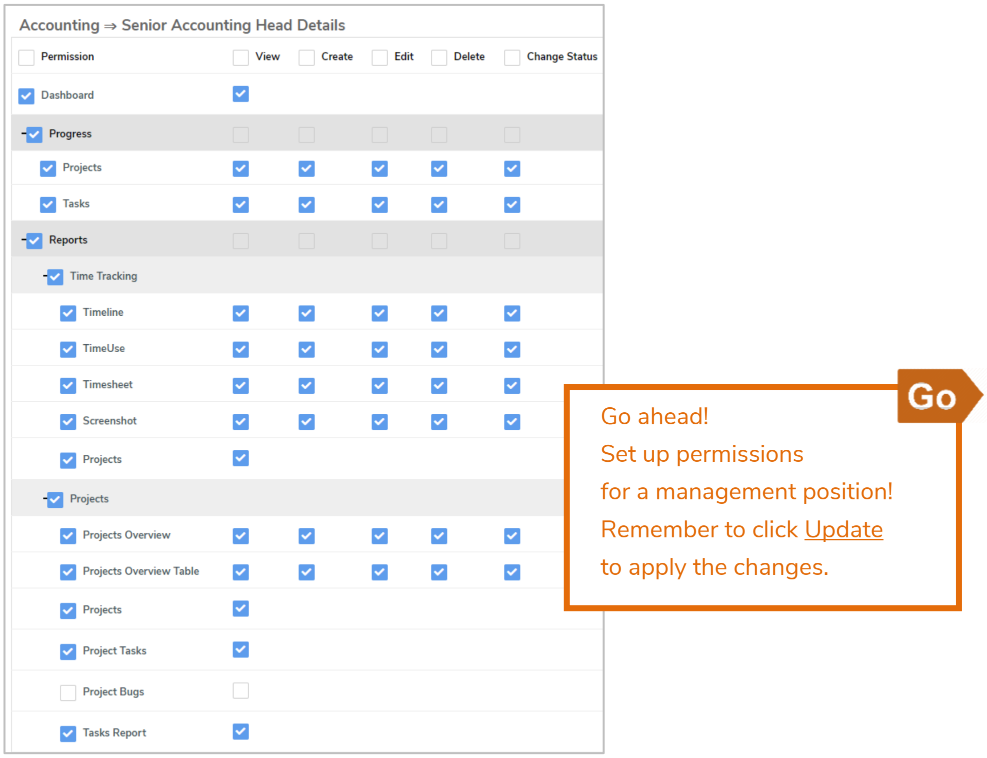


4.2.1. Management position configuration

The **management domain** consists of the project's overview. Upper-level positions can quickly see the progress of several or individual projects without the need to check every task separately. Remember that this will only work if we set up the proper permissions for the upper-level positions.
That's where we'll start.

Management Permissions

Let's **verify the manager position's permissions** by going to Setup > Organization > Departments > and clicking on the the management position.
In the example above, that position is the Senior Accounting Head. This management position requires full access to the *Projects* and *Tasks* submodules, as well as their respective items on the *Reports* modules.
Therefore, it's recommended to **Set up permissions** according to the image below and click ***Update*** to apply the changes

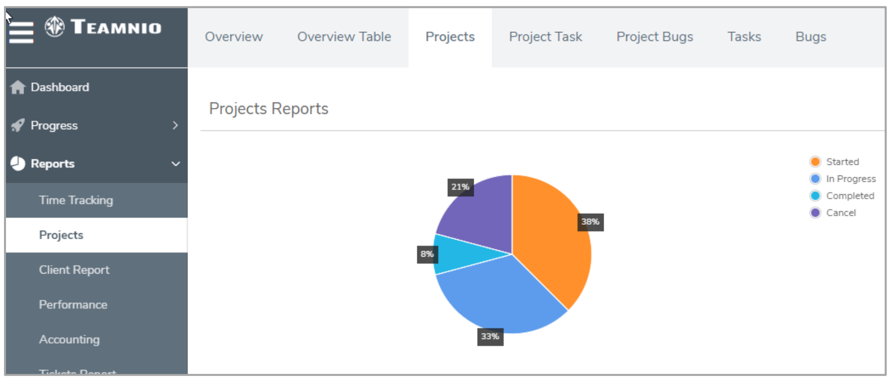


After we verify this configuration, the Senior Accounting Lead position is ready to start supervising the project.

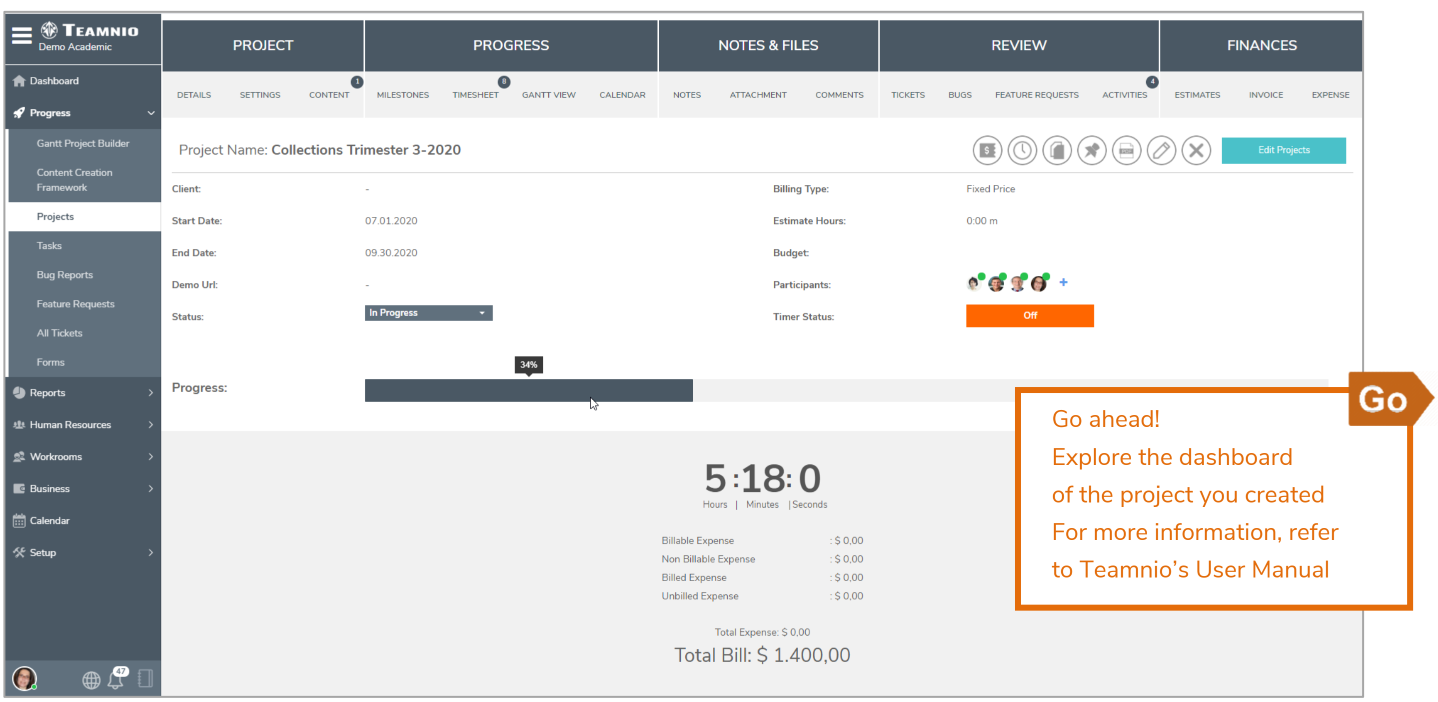
Management perspective

The progress of the management domain is automatically and constantly updated by the Smart Project Progress Calculator. To oversee the project's progress, the assigned user to the management position must access the **Reports Module** or the **Project's dashboard**.

- Let's go to **Reports**, select **Projects** and click on the **Projects tab**
  The image below is an example of the kind of global information available in this tab when many live projects have been rolled out within Teamnio



- Now, let's take a look at the **Project's dashboard** (Progress > Projects > Select project from the list).
  Here, we can check and edit all of its data, including different progress views.



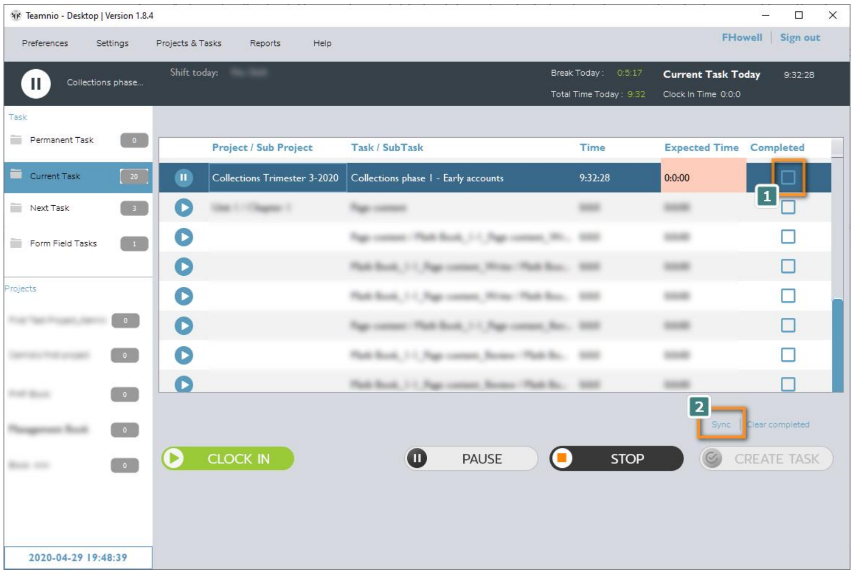
This is a quick overview of the management domain. The assigned users can even create new tasks or nest sub-projects to the existing projects using the task and project creation methods we already learned (sections 4.1.2. and 4.1.3.).

As we have seen, the management perspective empowers the leadership group of the organization to make precise decisions based on automated, simplified, and updated progress status reports.

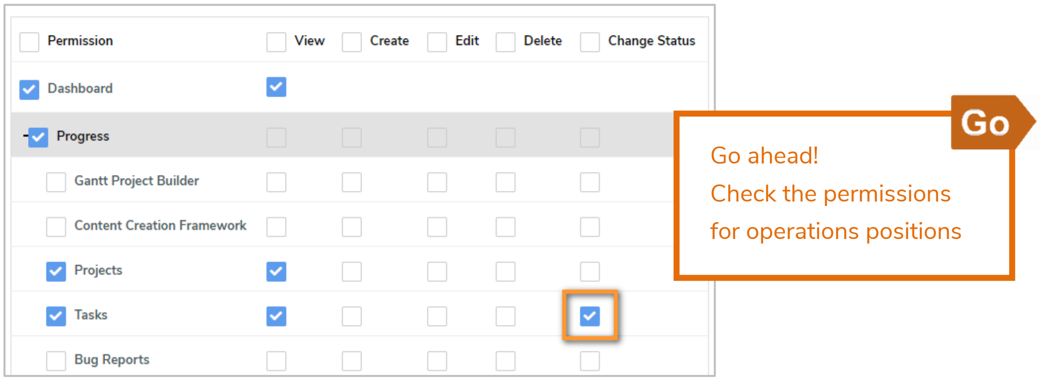
4.2.2. Operations position configuration

The **operations domain** consists of the highest level of detail within a project, represented by the tasks and their progress. It empowers the operational staff to identify their priorities and focus on the tasks available to them in the desktop app

The image below is a continuation of the previous example. Francis Howell works under Claudine Simon.
He is working on the collections project and after finishing the task, he will mark the task as completed, press the Sync button, and proceed to the next task on his list.



The empowerment mentioned before is achieved by setting permissions so that users like Francis (who are assigned to lower-level positions) always know what's next and what's first. Activating the *Change Status* permission on the *Progress > Task* row is necessary for users to be able to mark tasks as completed in the desktop app.



Furthermore, all dependencies between tasks and teams are automatically calculated so that projects advance with fluidity. The progress of the operational work is constantly updated by the Smart Project Progress Calculator, based on both the established baselines and the actual progress reported by the staff from the desktop app.

4.2. 3. P&T example

Let's analyze a simple example to summarize the functionality and benefits of Projects and Tasks.
For this example, we have a course writing team. Inside the project, there are two consecutive tasks, Task A (Writing) and Task B (Editing). The latter can only start after the former is completed.
Our team contains three people, Claudia (the manager), Janice (the writer) and Jake (the editor). Let's see how their lives would be simplified by working with Teamnio.

1. Claudia creates the project, with Tasks A and B, where B is dependant on A. She then assigns the tasks to the team.
2. At the beginning of her shift, Janice syncs her desktop app, identifies Task A, and starts tracking time for it as she writes the document.
3. Upon finishing, Janice marks Task A as completed in her desktop app and presses the Sync button.
4. The report gets updated on the web app, and immediately Claudia can see the progress report on the project's dashboard
5. Janice pings Jake to sync his desktop app, and he does it.
6. Automatically, Task B is made available for Jake, who starts tracking time on it as he begins editing the document
7. When Jake finishes, he mars Task B as completed, syncs his desktop app and notifies Claudia
   It's that easy!

This is how Teamnio helps all staff members know what to focus on, rather than guessing about which tasks to prioritize. Teamnio's intuitive features help avoid dependency bottlenecks.

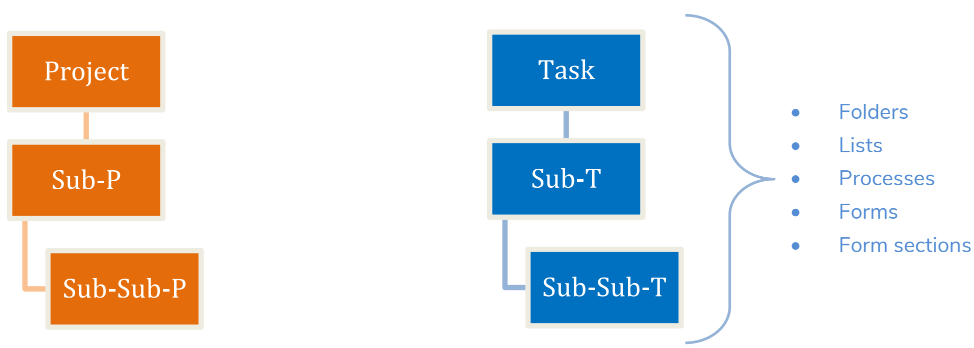
Now that we understand how to set up single-level projects and tasks, let's go up a step in the benefits ladder, by exploring Teamnio's multi-level design!

4.3. Multi-leveled Projects and Tasks

In Teamnio, the Management Domain and the Operations Domain are designed to contain up to 3 hierarchy levels or depths:

	The PROJECT DOMAIN (Management)	The TASK DOMAIN (Operations)
Level 1	Project	Task
Level 2	Sub-Project	Sub-Task
Level 3	Sub-Sub-Project	Sub-Sub-Task

The Management Domain will generally be used as shown above as this provides an easy overview of the work. On the other hand, the 3 Tasks depths can be transformed into folders, lists, processes, forms, or form sections.



Teamnio includes several out-of-the-box templates. These will inspire you into renovating your project management and give you ideas about the basic structures upon which you can build your own templates.
And when you create a structure in Teamnio that you're proud of, you can share your ideas!
Maybe your example will become a Teamnio Success Case Study!

4.3.1. Flexible functionality

The default project structure (DPS) is the best fit for one-time projects and small teams, and it's the traditional approach offered by standard project management software.

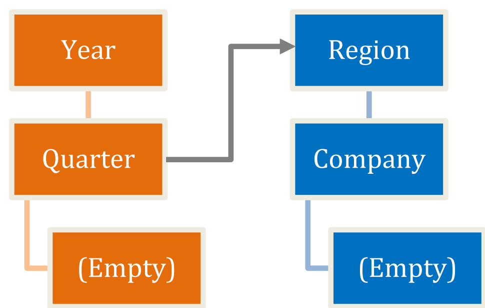
The Default project structure

	The PROJECT DOMAIN (Management)	The TASK DOMAIN (Operations)
Level 1	Project	Task (Also called containers, folders, etc)
Level 2	Sub-Project	Sub-Task (Also called lists)
Level 3	Sub-Sub-Project	Sub-Sub-Task

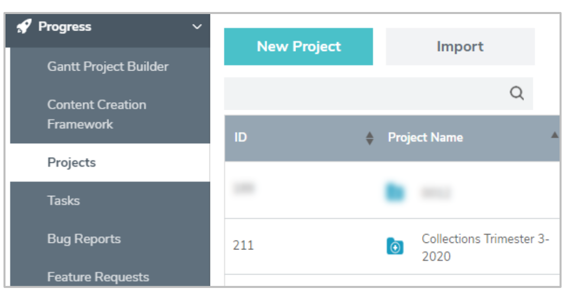
It´s time to use Teamnio's DPS!

We'll build upon the example project we created before.

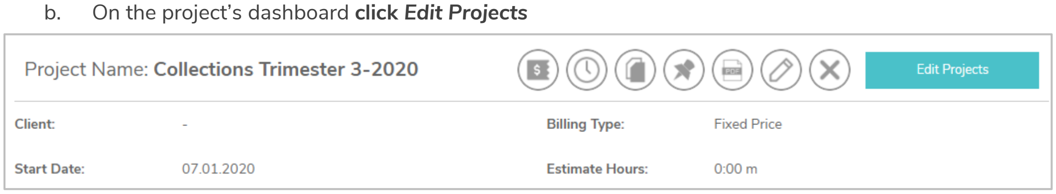
1. To begin, let's **design the structure**.
   We have a <u>collections project</u>, so let's break it down.
   a. In the project domain, we´ll use a time criterion
      i. Year for level one,
      ii. Quarter for level two, and
      iii. We´ll leave level three empty in case its needed during the implementation
   b. In the task domain, we´ll use a geographic criterion
      i. Region for the first level, and
      ii. Company name for the second.
      iii. We'll leave the third level alone for now



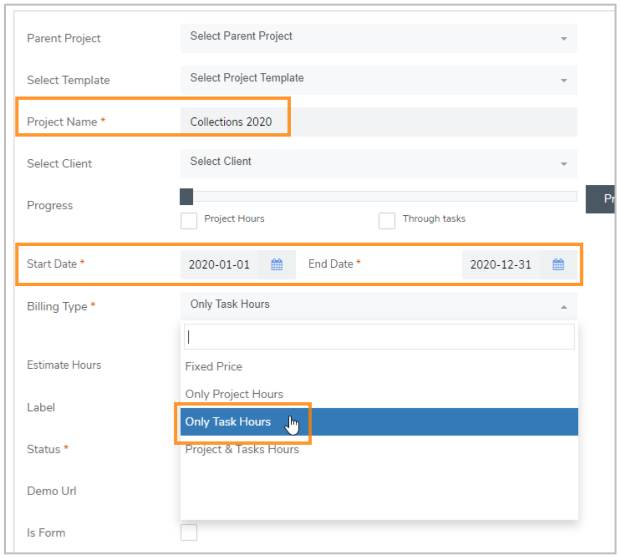
2. Next, let´s create the **project structure.** We'll begin by modifying the existing project
   a. Go to **Progress > Project**, and **access the Collections project**



   b. On the project's dashboard **click *Edit Projects***



c. Let's **update its name, dates and other related parameters** to reflect that this will be the collections project for a whole year.
This is our level 1 project, so we need to **leave blank** the ***Parent Project*** field



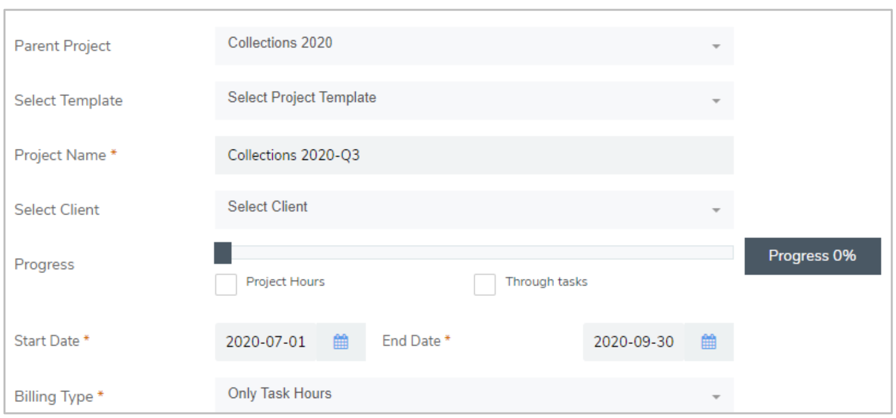
d. **Click Update** to confirm.

e. Let's create our level 2 project.

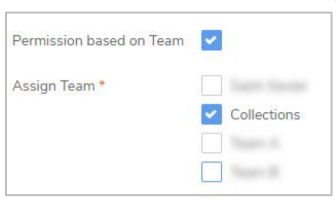
i. Go back to Projects and **click New Project**

ii. **Select the Parent Project,** which will be our previous project

iii. **Fill the Project Name** field, with the next quarter's information

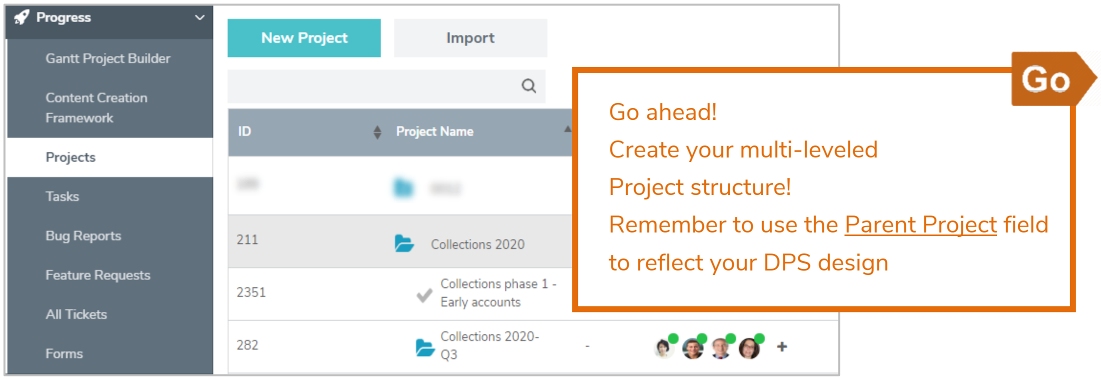


i. Then, enable **Permissions based on team** and assign the project to the **Collections team**



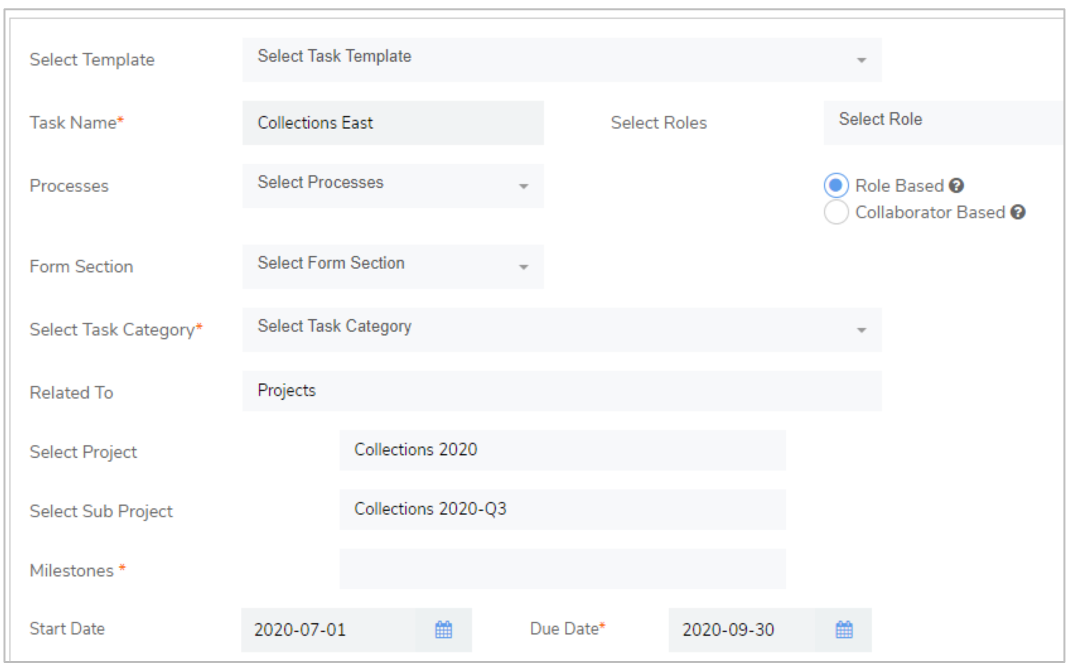
ii. To finish, **click Save**

f. Now, go back to the **Projects** list**, find the level 1 project, and expand it** to verify the structure was created properly. This structure includes the task we created before, which can be deleted for now.

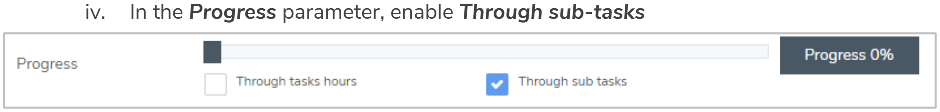


g. That's it for the project structure.

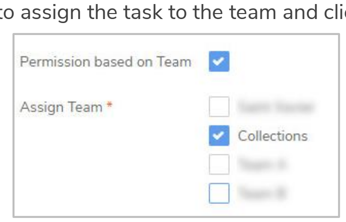
3. Let's go ahead and create the tasks.
   a. Go to ***Progress > Tasks*** and ***click New Task***
   b. Now, fill the form according to the image below:
      i. The ***Task Name*** should include the **region's name** to <u>correspond with our design</u>
      ii. In the ***Related to*** field, **select *Projects***, and then **select the level 1 and level 2 projects** that we just created
      iii. Then, select the corresponding **dates** for the <u>quarter of the collections' sub-project</u>



      iv. In the ***Progress*** parameter, enable ***Through sub-tasks***



      v. Finally, we need to assign the task to the team and click **Save**



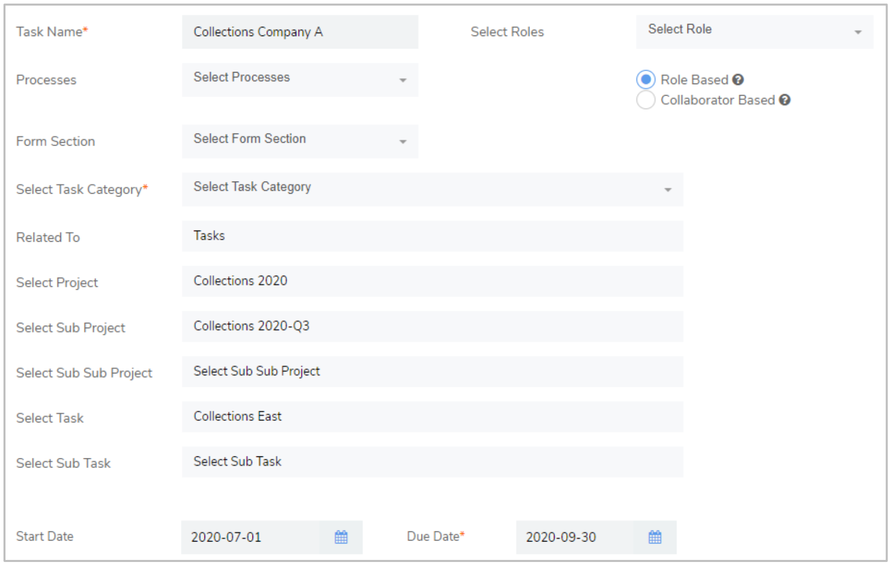
This leads us to the task's dashboard.

c. Let's create the first sub-task by going back to ***Progress* > *Tasks*** and clicking **New Task**

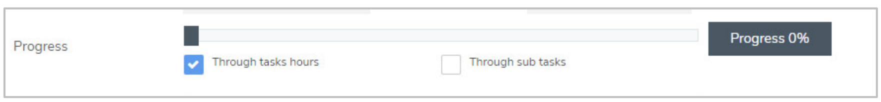
   i. The **Task Name** should include the **Company name** to <u>correspond with our design,</u> for instance, "Company A"

   ii. In the ***Related to*** field, **select *Tasks***. Then, **select the level 1 and level 2 projects**, as well as the **Level 1 task** we just created

   iii. Then, select the corresponding **dates** for the <u>quarter of the collections' sub-project</u>

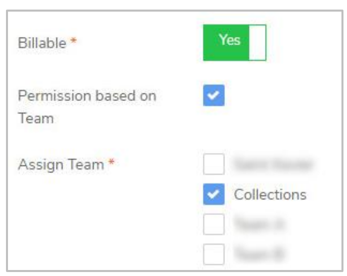


   iv. Let's set up **Progress** enabling ***Through tasks hours***

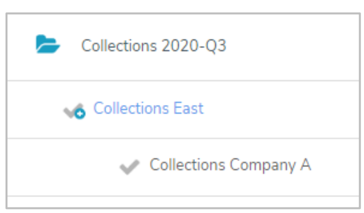


   v. Also, activate ***Billable,*** since this is the deepest level we´re going to use for now

   vi. Finally, **assign the task to the team** and **click Save**



d. As a result: the task structure looks like this:



e. That's it! We´re ready to repeat this process and populate the subtask level to take advantage of Teamnio's Default Project Structure

Go

Go ahead!
Create a multi-leveled
Task structure!

Room for growth

The one-size-fits-all approach found in the Default Project Structure might seem "good enough" for regular projects, but there is ample room for improvement. Some opportunities are:

- Efficiency
- Productivity boost
- Promoting best practices
- Cost reduction
- Risk management
- Decision making
- Complex dependencies

Fortunately, Teamnio goes above and beyond to solve the lack of project-structure-flexibility that causes frustration for seasoned Project Managers. It does this by offering advanced project structures.

4.3.2. Advanced Structure types

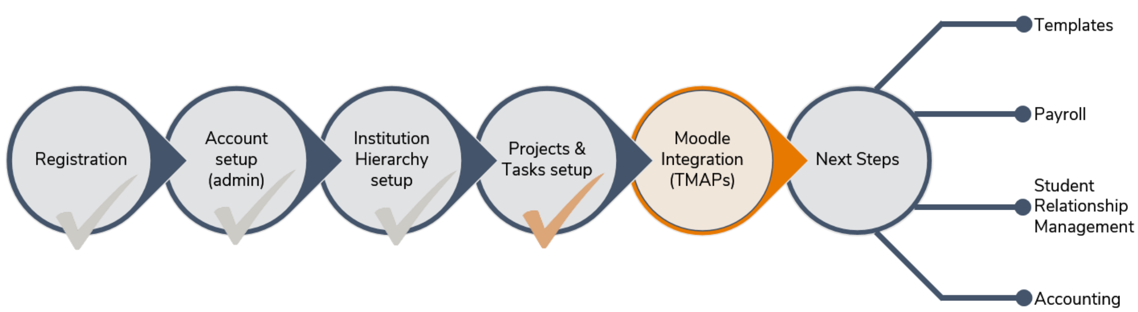
Teamnio's user manual includes several advanced project structures, such as the following:

- The **Process-oriented** project structure
- The **Agile** project structure
- The **Lean six-sigma** project structure
- The **Content Creation** project structure
- The **Q2M (Quick to Market)** project structure
- The **Conditional** project structure
- The **Creative-innovation** project structure
- The **Software development** project structure
- The **Legal** project structure

Are you ready to expand your project implementation capabilities?

4.4. There you go!

We´re done with projects and tasks!
It's time to proceed with the main section of this guide: Moodle Integration!



Step 5: Moodle Integration (T-MAPs)

Moodle's integration with Teamnio is done through the T-MAPs (Teamnio-Moodle Awesome Plugins). These plugins synchronize the student's activity within Moodle with Teamnio's tracking functions.

5.1. Perspective shifts

To better understand the following demonstrations, we´re going to jump between four perspectives:

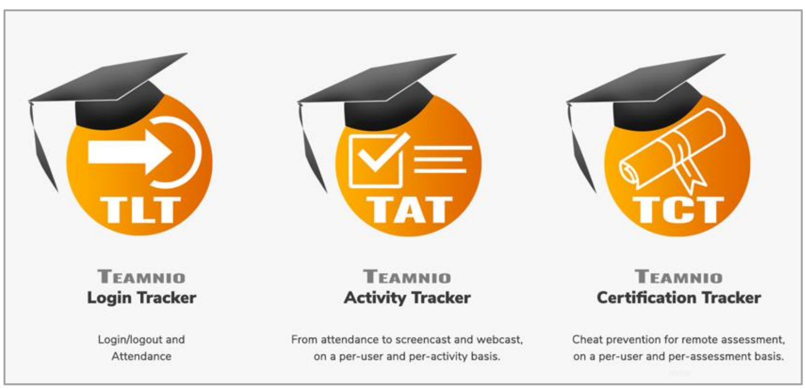
- Moodle (Admin's account)
- Moodle (Student's account)
- Teamnio (Admin's account)
- Teamnio (Student's computer)

One of the next four images will be shown each time we change from one perspective to the other:

moodle Admin's Account | moodle Student's Account
TEAMNIO Admin's Account | TEAMNIO Student's computer

5.2. Teamnio Plugins

Moodle's integration with Teamnio is achieved through 3 plugins: TLT, TAT, and TCT. With a single click, we can synchronize all course content into Teamnio



The following table might help to understand them better. It's important to note that TLT and TCT can be set up independently from each other, whereas TAT includes TLT.

Plugin	The plugin...	It answers this main question:
TLT (stand-alone)	Tracks student attendance	When and for how long were they in Moodle?
TAT (includes TLT)	Tracks Activities and Resources	How long did it take them to complete each item within the course?
TCT (stand-alone)	Performs cheat prevention through remote surveillance of graded tests	Is their activity honest when performing evaluations?

Let's see each of these in action!

5.2.1. T-MAP features

All T-MAPs have the following features in common:

1. One-click installation from your Moodle, like any other Moodle plugin
2. Controlled user creation: you can choose how to create Teamnio users, depending on two modes:
    a. Open: creates Teamnio users automatically when they perform a specific action within Moodle, such as logging in.
    b. Restricted: you decide who is allowed to track by first creating their user in Teamnio

After this brief and easy setup stage, you can:

- Track student activity to the extent of your choosing. From attendance (TLT) to tracking of each activity within courses (TAT), including the ability to record screenshots and webcam shots
- Access Teamnio's reports to perform a variety of tasks, such as:
    - Analyzing student behavior to make better-informed decisions
    - Setting goals for the students
    - Exporting the reports to share your success with the stakeholders, such as auditors and financing authorities

5.2.2. Local vs. Web T-MAPs (DA vs. no DA)

When using the TLT or the TAT plugins, we can choose between two types of functionality: Web or Local. The first is simpler to use because Teamnio's tracking functions run directly from the student's Moodle session, while the second requires the Desktop App and it integrates additional tracking functions, such as Screenshots, Screencast, Webcam Shots, Webcam Video, Web&App usage, and Poor Time Use.
On the other hand, the TCT plugin does require the student to open the Desktop App.
Please consider this when setting up your T-MAPs.

5.3. Preparation steps for T-MAPs sync

5.3.1. Time Tracking default Settings

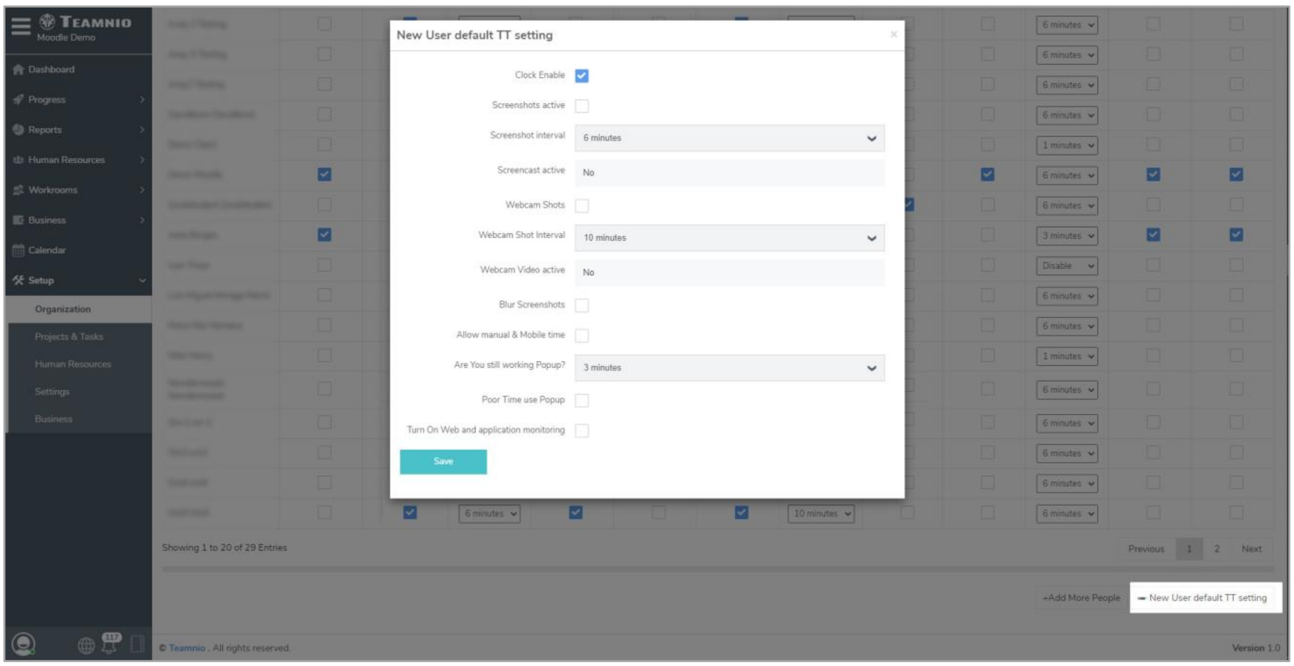
When the T-MAPs are set up in Open mode, Teamnio creates users automatically when the student performs a specific action in Moodle, either logging in (TLT/TAT) or accessing a graded evaluation (TCT). For that reason, the first step to set up the T-MAPs is to establish a Default TT setting for all new users.

1. Go to **Teamnio's Admin Account**

   TEAMNIO
   Admin's Account

2. Navigate to ***Setup*** **>** ***Organization*** > ***Time Tracking***
3. **Scroll to the bottom** right, **click** ***New User default TT Setting***, and set up the trackers according to the plugin you wish to use. Remember that if you use TAT, it includes TLT functionality.
   a. **For the TLT plugin, only activate Clock Enable** and **click Save**

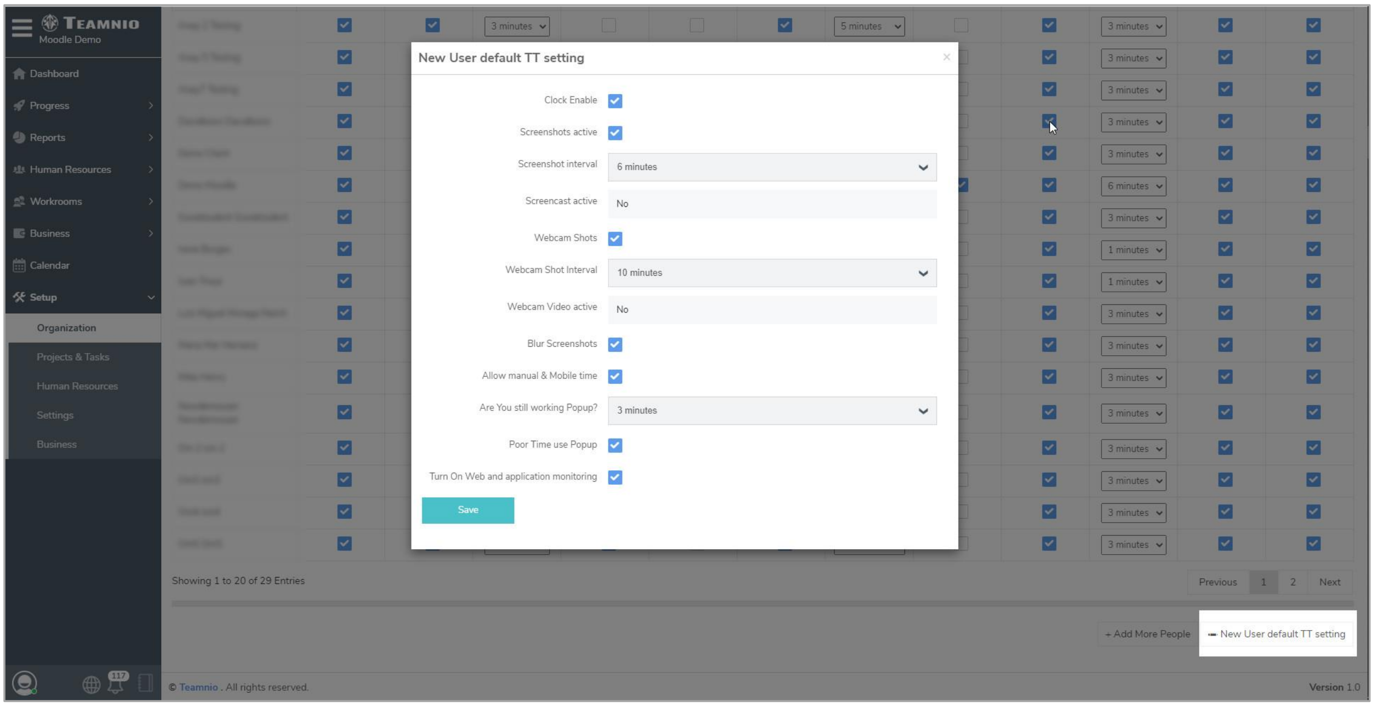
      This image includes a reference:



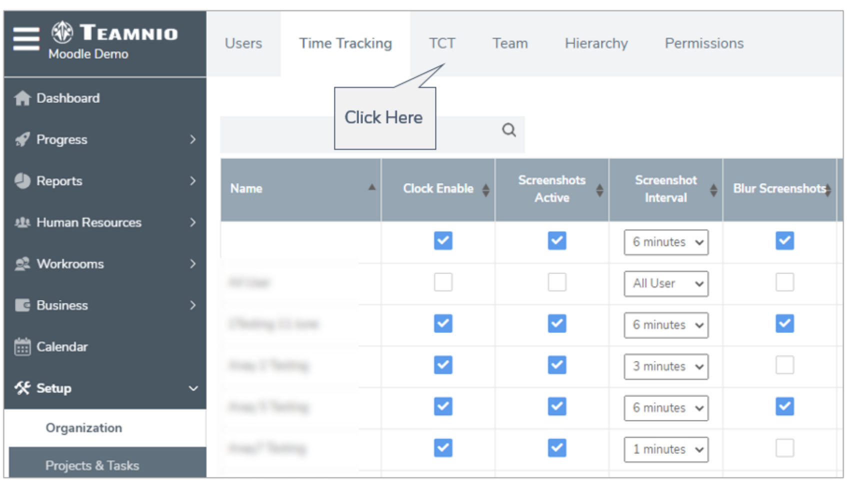
b. **For the TAT plugin, activate all the trackers except Screencast and Webcam Video**

c. ***Click Save*** to confirm

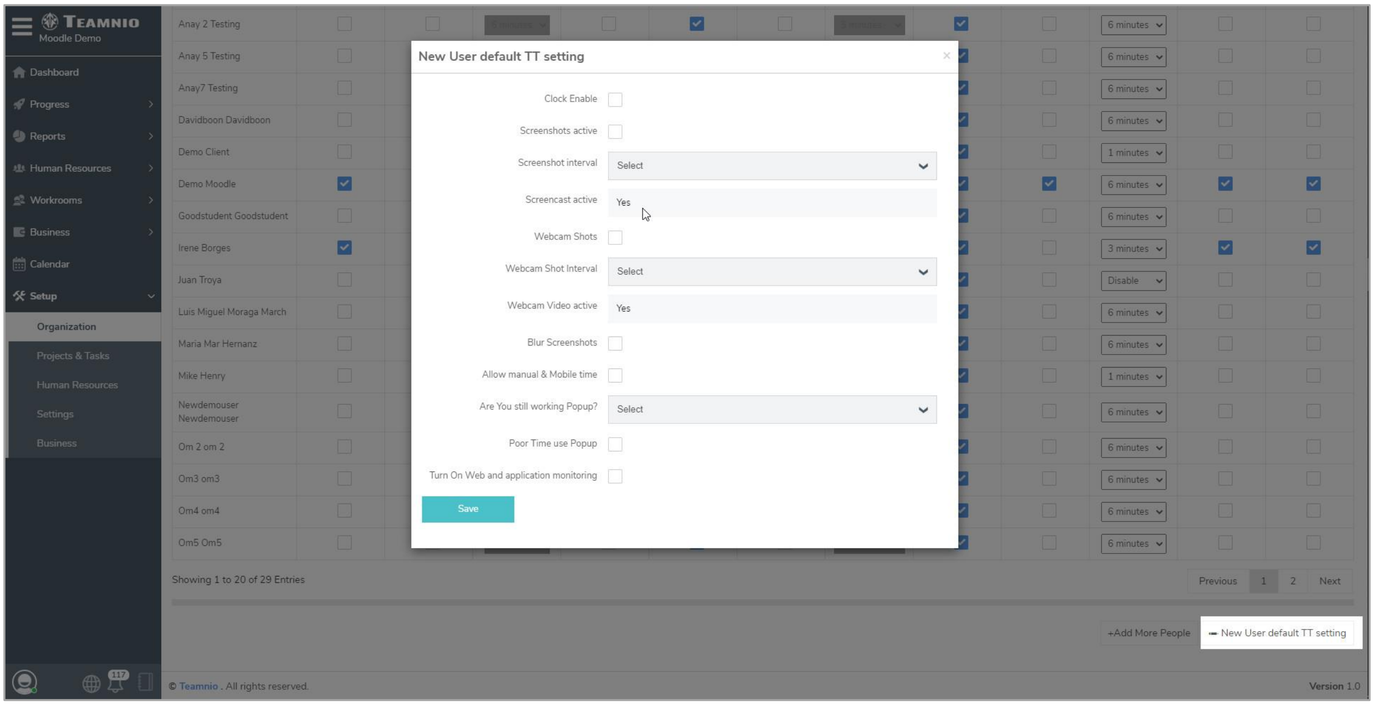
This image includes a reference:



4. Now, if you want to set up time tracking for the TCT plugin, scroll to the top of the screen and go to the **TCT tab**



a. Click the button ***New User default TT Setting***
In here, we must only enable ***Screencast active*** and ***Webcam Video active.***
Leave the rest of the trackers disabled.



b. **Click Save** to finish this preparation stage!

That's it! From now on, and thanks to Open Mode, the T-MAPs will create users in Teamnio automatically with the correct Time Tracking settings!

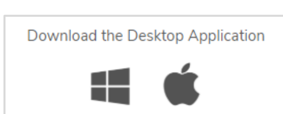
5.3.2. Student's first login to Teamnio DA

Teamnio's Desktop App is OPTIONAL when we use Moodle's TLT and TAT plugins. The Desktop App is only required for tracking student activity with the TCT plugin, and it expands the functionality of the TLT and TAT plugins (see 5.2.2)
Let's test the login tracking plugin (TLT) on the student's side. The setting steps are the same for using the Desktop App with the TAT and the TCT plugins.

1. Now let's **go to the student's computer**

   TEAMNIO
   Student's computer

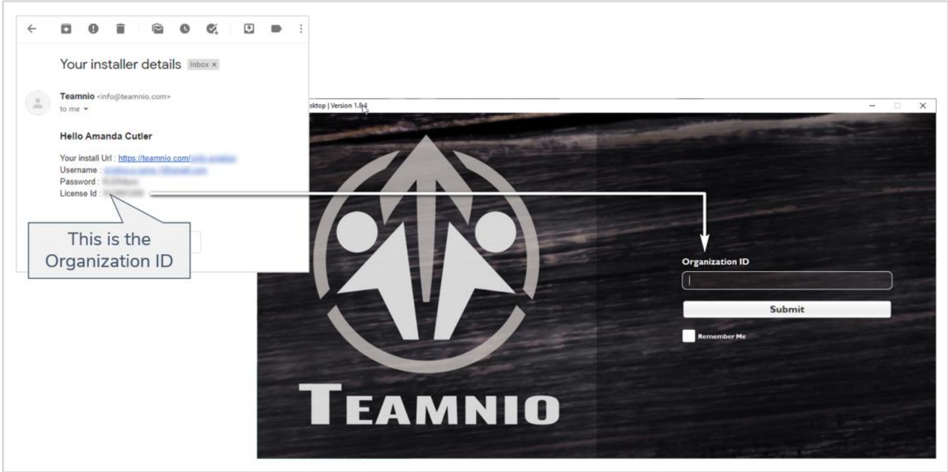
2. We should instruct them to download and install Teamnio's desktop app, using these steps:
   a. Access the institution's permalink URL* and select the operative system



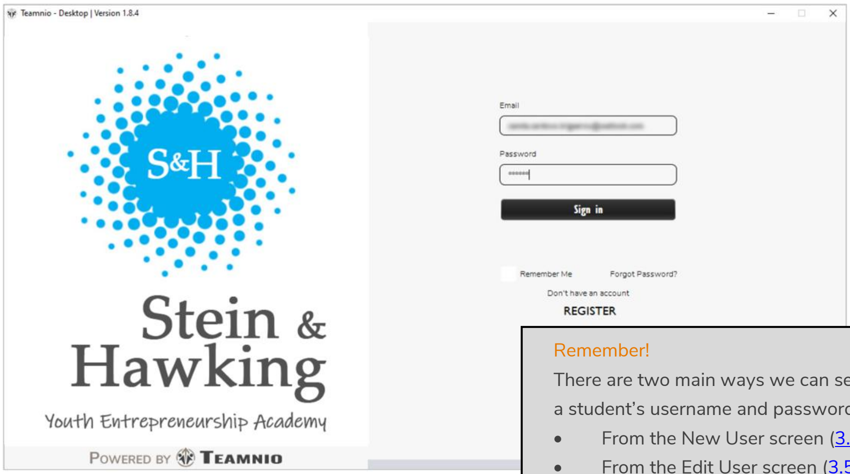
> Important!
> The **Permalink URL** was included in the confirmation e-mail we received upon finishing the registration stage (1.2.)

   b. After the download is complete, **execute the installer**

3. They should open Teamnio's desktop app and enter the Organization ID
   Remember, this number is the License ID we received at the end of the registration stage ([1.2. Step 9](#))

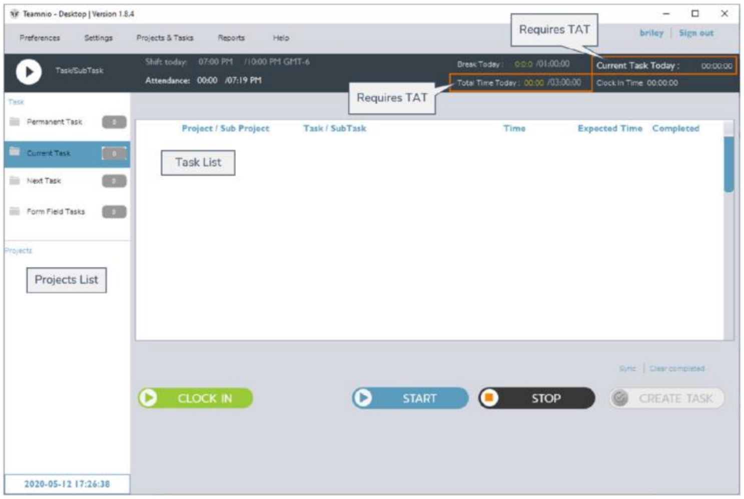


4. This pops Teamnio's login window (which shows the school's logo to confirm they entered the ID correctly)
   In here, they should enter their Teamnio **username and password**, and **click Sign In**



> Remember!
> There are two main ways we can set or change a student's username and password:
> - From the New User screen ([3.5.1.](#))
> - From the Edit User screen ([3.5.5.](#))

5. This is the student's desktop app.
   Let's analyze three main pieces of information



> Important!
> The task list might show some items. This might happen if we previously assigned tasks to "Everyone" back when we were testing tasks (For instance, [2.2.1. Step 3](#))
> To fix that:
> 1. Go to **Progress > Tasks** to access the task list
> 2. Check the **Collaborators** column. Access the ones assigned to "Everyone"
> 3. In the assignment section, move the task's assignment from "Everyone" to any single user.
> 4. Back at the student's desktop app, logout and log back in

- At the top, we have the timers bar. Some of them require the TAT plugin, for this example, they show zero.
- The task list and the project list:
  - Are empty because we´re tracking through the TLT plugin
  - Can show data when we track Moodle activities and resources with the TAT or the TCT plugins (5.5. or 5.6.)
- Finally, the green CLOCK IN button:
  - Triggers automatically when the student logs into Moodle. Attendance tracking begins this way.
  - The student will be Clocked-out automatically when they log out of Moodle.
  - The student can press this button manually as well

Method	Left counter shows	Right counter shows	T-MAP required
Clock in time	Total time tracked today	N/A	TLT
Break Today	Total break today	Maximum allowed break time	TLT
Total Time Today	Total tracked time today (in synced Moodle activities and resources)	Minimum expected time	TAT
Current Task Today	Total time recorded today (in the current Moodle Activity or resource)	N/A	TAT

Now what we've seen the whole empty system, we have a frame of reference.
We´re ready to explore the three T-MAPs.

5.4. Login Tracking (TLT)

The TLT plugin tracks student attendance based on their login and logout dates and times. This automatically creates reports, based on the expected attendance schedule.

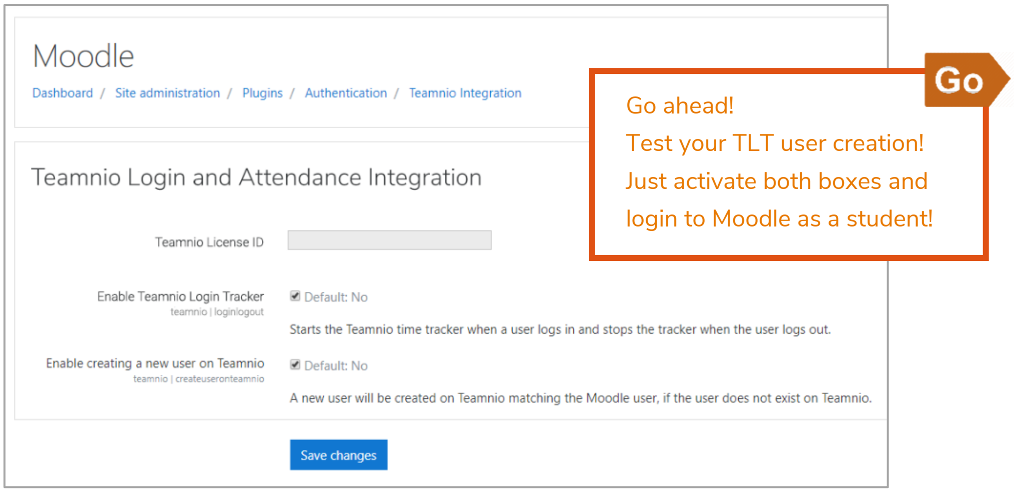
5.4.1. TLT - Moodle setup (Local and web)

1. Let's go to **Moodle's Admin Account**

2. Go to the **Dashboard** and go to **Site Administration** and select the **Plugins tab**
3. To access the TLT plugin, select ***Teamnio Login and Attendance Integration.***
4. **Fill** the plugin configuration screen
    a. In the ***License ID*** field, copy your License ID.
    Remember, this number was included in the last confirmation email from the Registration Process (see 1.2.8b)
    b. **Activate** the ***Enable Teamnio Tracking*** checkbox to let students track their attendance
    c. **Decide** whether to activate the ***Enable Creating a New User on Teamnio*** checkbox.
        i. Check the box to activate Open Mode
        ii. Or uncheck it to activate Restricted Mode
        For this demonstration, we´ll **activate Open Mode**

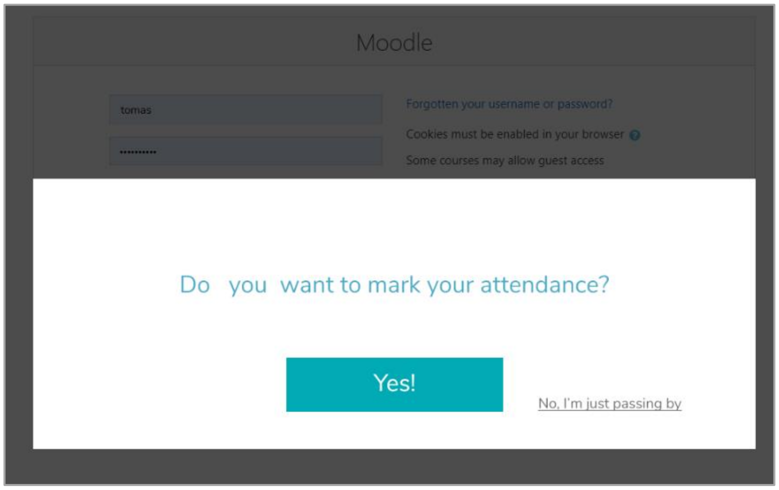
> Important!
> **Open mode:** creates a Teamnio user automatically when the student logs in to Moodle
> **Restricted Mode:** allows you to decide who can access the tracking features.
> You create the Teamnio users.

    d. Finally, **confirm** by **clicking *Save Changes***



5. It's time to **test Open Mode**
    a. **Still in Moodle,** create a dummy student account. Let's say that the student's username for that account is Tomas Fontan
    b. Open an **incognito browser window** and **log in to Moodle with the dummy credentials**
    This will effectively create a user within Teamnio.

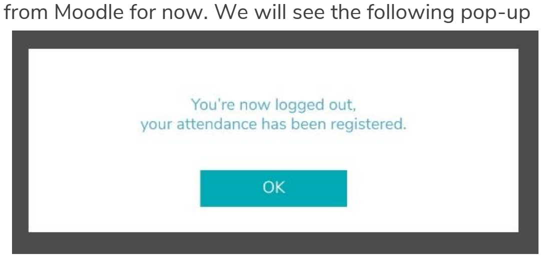
c. Before granting access, the following pop up will show



d. **Click Yes** to continue.
From this point onward, the TLT plugin will track this student's attendance within Teamnio!

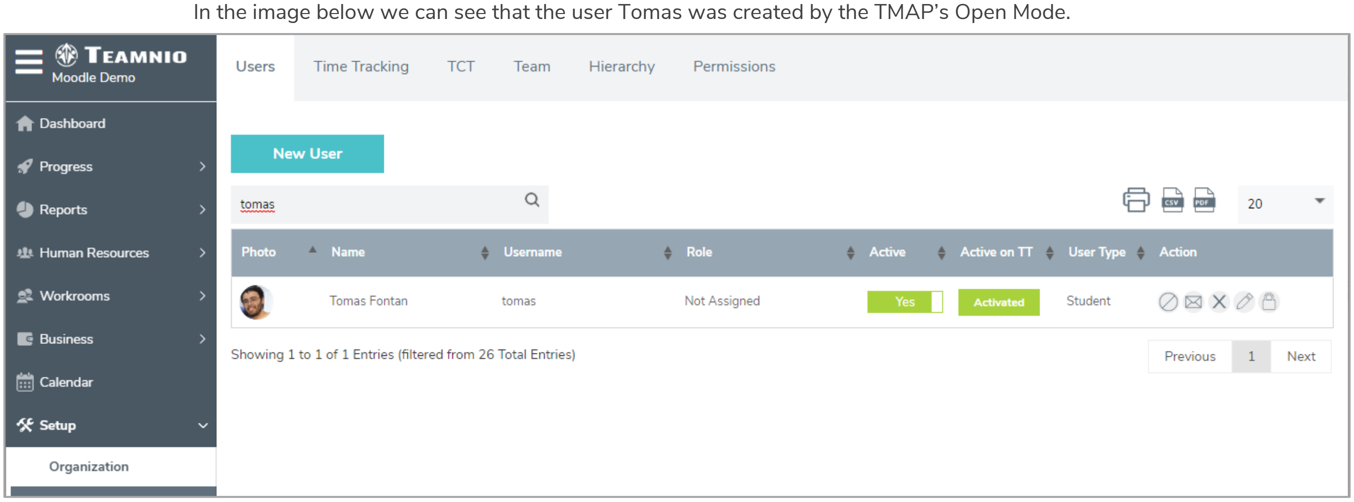
e. Once inside, the attendance tracker will show on the right-hand panel.

f. Let's logout from Moodle for now. We will see the following pop-up



g. To finish this test, let's go to **Teamnio's Admin Account**

h. **Navigate to Setup > *Organization* > *Users*** and search for the dummy student's name to verify if the user was successfully created
In the image below we can see that the user Tomas was created by the TMAP's Open Mode.



6. That's it! Teamnio's TLT functionality has been integrated into Moodle!

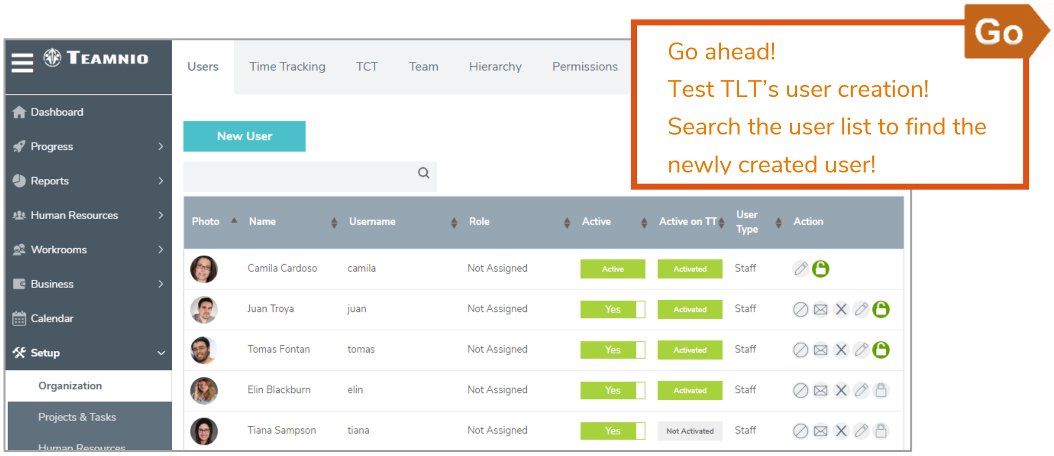
5.4.2. TLT – Teamnio setup (user confirmation and schedule setup)

The following steps require to have completed section 5.4.1., including the test of TLT's Open Mode.

1. Let's go to the **Teamnio's Admin Account**

TEAMNIO
Admin's Account

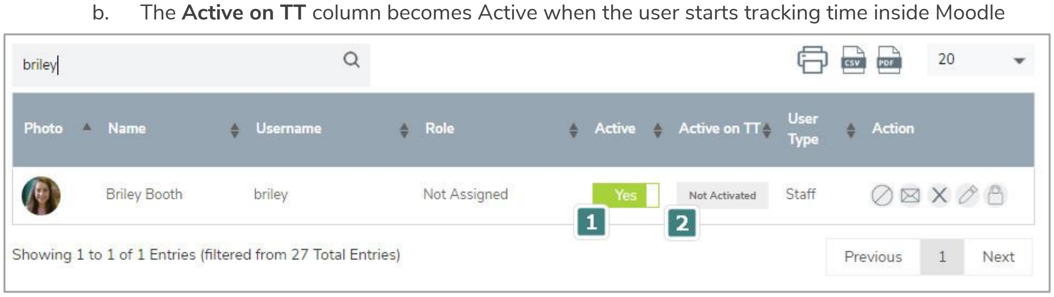
2. Navigate to ***Setup > Organization* and click on the *Users* tab**
Here, the student's user got created automatically because we activated Open Mode from Moodle's TLT plugin
Type in the search box to **find the dummy student** we just used to login to Moodle.



Important!
It's optional to use TLT's Open Mode to create users.
Remember, there are 3 other methods for creating users. Let's see them all:

Method	Who performs it?	Type
TLT Open Mode	System (Moodle) (Authorized by the system)	1-by-1 (automatic)
Badge Import	Admin (Imports file to the web app)	Many at once (manual)
External	User (Creates account from the front-end) Admin (Authorizes the account from the web app)	1-by-1 (manual)
Internal	Admin (Creates and Authorizes the account from the web app)	1-by-1 (manual)

3. Let's check that new user
(The image below shows an example of a student named Briley)
   a. The **Active** column shows that the user is ready to start tracking time. This was done automatically by TLT's Open Mode, but if we employ the external creation method, we must perform the activation manually.
   b. The **Active on TT** column becomes Active when the user starts tracking time inside Moodle



4. Next, we must **verify the user's Time Tracking settings.** We just have to verify these settings because we have already set up a default TT setting in section 5.3.

a. Go to ***Setup > Organization > Time Tracking***

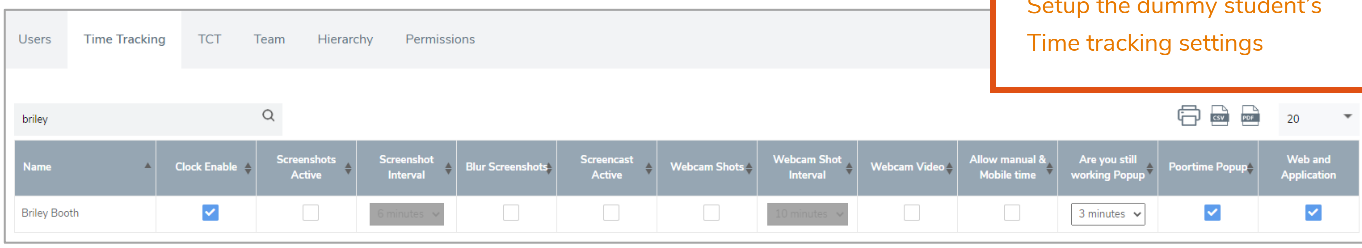
b. Let's analyze these settings.
Their general functionality is explained in section [2.2.1.]

c. The only choice we must take pertains to the ***Clock Enable*** checkbox. It tracks time continuously, both from login/logout and selected activities and resources

d. On top of that, we could **activate *Poortime Popup*** and ***Web and Application*** for tracking the student's activity during their assigned schedule.
Important: this action will require students to use the Desktop App

> Work Smart!
> Skip this step by setting up a [Time Tracking template].

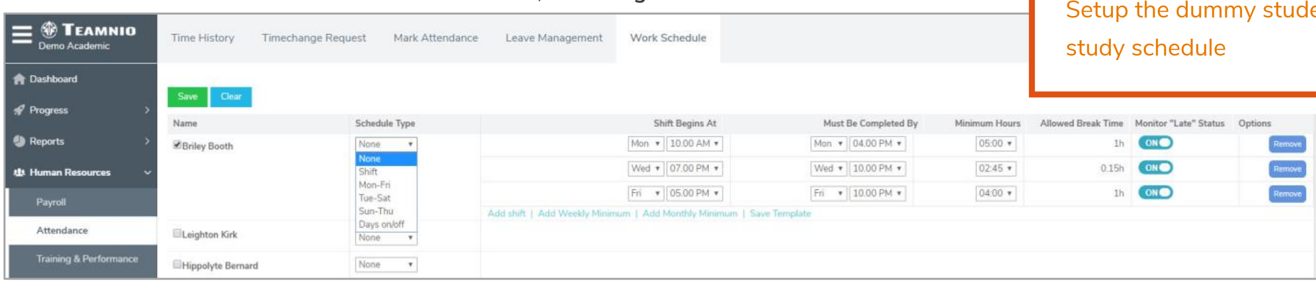
> **Go**
> Go ahead!
> Setup the dummy student's Time tracking settings



These time tracking settings work in tandem with the student's study schedule

5. To set up the student's shift, go to ***Human Resources > Attendance*** and click the ***Work Schedule tab***
   a. This list shows all the users, so we first have to **find the student**
   b. Then, **select the Schedule Type,** and configure the fields that pop to the right
   c. Finally, if we want to use this schedule for other users, click Save Template
   d. To save the user's schedule, **click the green Save** button

> **Go**
> Go ahead!
> Setup the dummy student's study schedule



5.4.3. TLT – Attendance report (empty)

We have just set up the student's time tracking settings and their schedule. As a result, when this student logs in Moodle:

- Teamnio will track the time she spends on the system
- This includes the data gathered by all the activated trackers

Then, when she logs out of Moodle, Teamnio will stop tracking everything

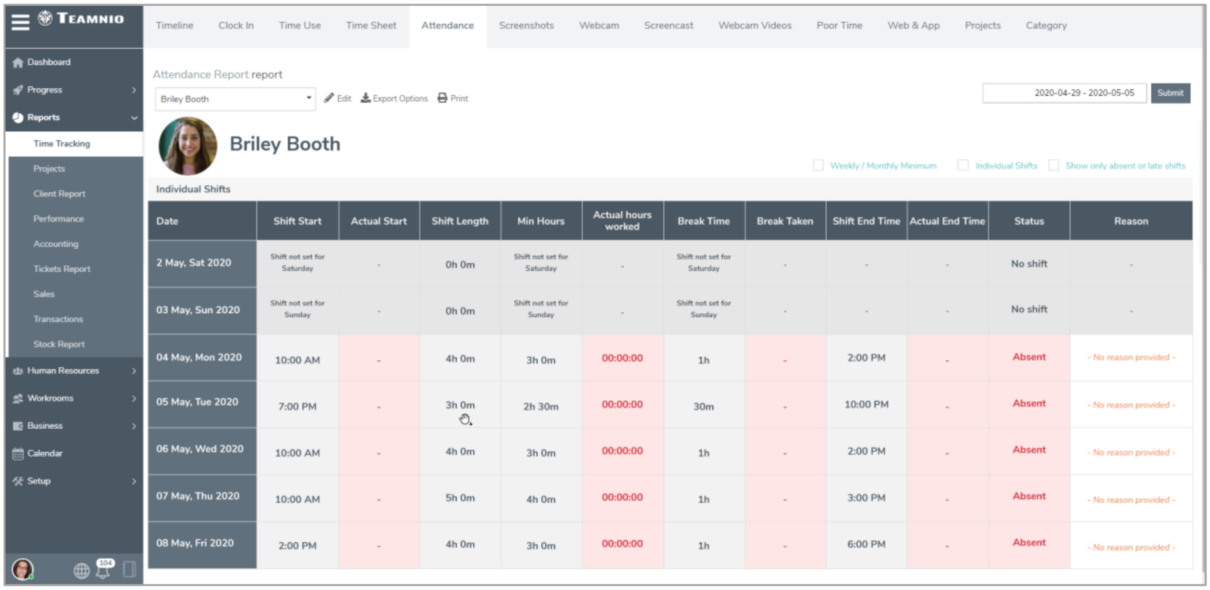
Let's pull up her attendance report.

1. Login to **Teamnio's Admin account**

   TEAMNIO
   Admin's Account

2. Go to ***Reports >Time Tracking*** and click on the **Attendance tab**
   The TLT plugin reports all the dates and times that the student was supposed to log in to Moodle.
3. To pull up the attendance report:
   a. Select the **student's name** and the **date range**
   b. **Click Submit**

   In the example below, the student hasn't been tracked so far, so the *Status* column shows *Absent* for each date of the selected range



5.4.5. TLT – Testing phase

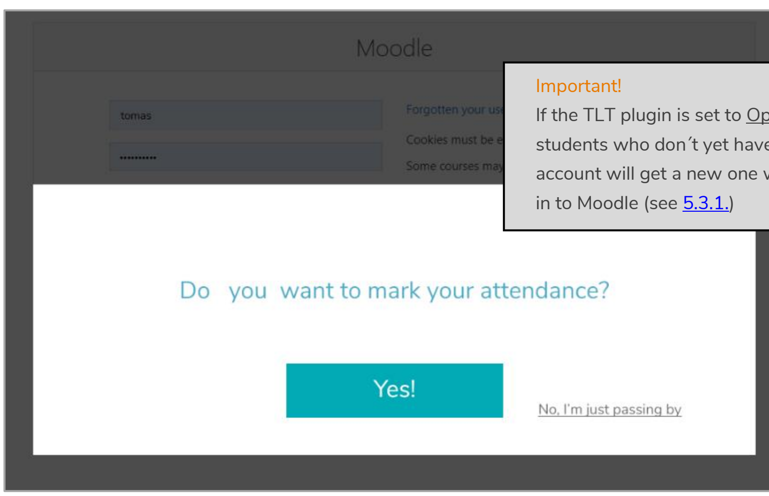
It's time to test the TLT tracking functions!

We're going to use our student dummy account to access Moodle and its integrated Teamnio TLT functionality

1. First, the student must **log in** to their **Moodle account** and follow their routine

moodle Student's Account

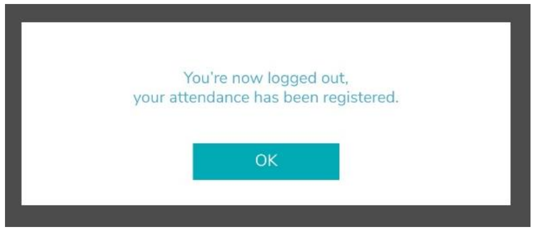
2. TLT will pop up this message:
    a. If they **click Yes,** their attendance will be automatically tracked during the time they're logged in Moodle
    b. They can also click ***No, I´m just passing by*** to keep the tracker from starting.



Important!
If the TLT plugin is set to Open Mode, all students who don´t yet have a Teamnio account will get a new one when they sign in to Moodle (see 5.3.1.)

    c. After clicking Yes on the pop-up, the browser shows Moodle's interface.
    d. This will show Teamnio's tracker on the right-hand panel.
    The student can proceed to study their class materials as they normally do
    e. Finally, when they're done studying and sign out of their Moodle account, TLT will pop up the following message.
    There are no actions required besides **clicking OK to confirm**

Go
Test the TLT plugin!
Use a dummy account to use Moddle as a student!

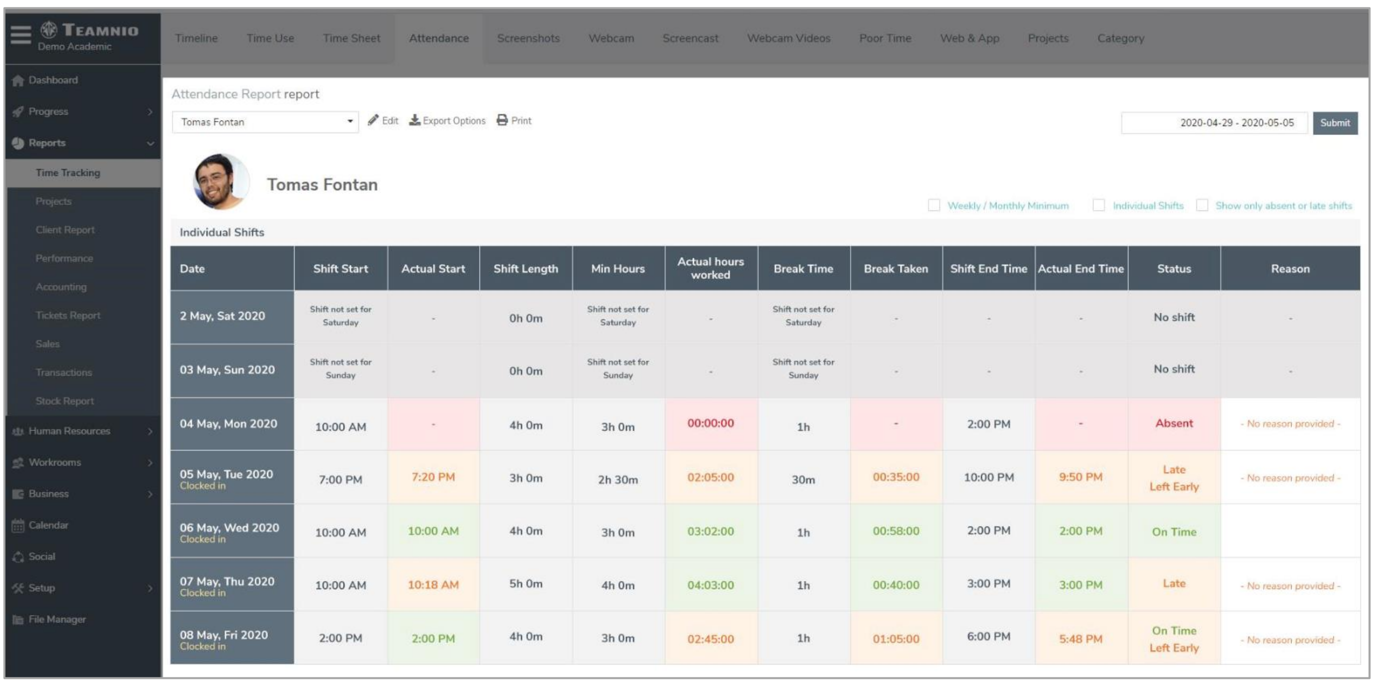


That's it for the student's side!
Just 2 simple steps!

3. Now, let's go to see the reports, on **Teamnio's admin account**

TEAMNIO
Admin's Account

4. Navigate to ***Reports*** **>** ***Time Tracking*** and click the ***Attendance tab***
   This is an example of the student's report after a few days of activity
   For instance, on May 5th the student:
   - Was 20 minutes late
   - Tracked 2h05m instead of his minimum amount, which was 2h30m
   - Took 35 minutes total breaks, out of the configured 30 minutes maximum, and
   - Left 10 minutes early
   - The Status column shows both his tardiness and his early leave.



Date	Shift Start	Actual Start	Shift Length	Min Hours	Actual hours worked	Break Time	Break Taken	Shift End Time	Actual End Time	Status	Reason
2 May, Sat 2020	Shift not set for Saturday	-	0h 0m	Shift not set for Saturday	-	Shift not set for Saturday	-	-	-	No shift	-
03 May, Sun 2020	Shift not set for Sunday	-	0h 0m	Shift not set for Sunday	-	Shift not set for Sunday	-	-	-	No shift	-
04 May, Mon 2020	10:00 AM	-	4h 0m	3h 0m	00:00:00	1h	-	2:00 PM	-	Absent	- No reason provided -
05 May, Tue 2020 Clocked in	7:00 PM	7:20 PM	3h 0m	2h 30m	02:05:00	30m	00:35:00	10:00 PM	9:50 PM	Late Left Early	- No reason provided -
06 May, Wed 2020 Clocked in	10:00 AM	10:00 AM	4h 0m	3h 0m	03:02:00	1h	00:58:00	2:00 PM	2:00 PM	On Time	
07 May, Thu 2020 Clocked in	10:00 AM	10:18 AM	5h 0m	4h 0m	04:03:00	1h	00:40:00	3:00 PM	3:00 PM	Late	- No reason provided -
08 May, Fri 2020 Clocked in	2:00 PM	2:00 PM	4h 0m	3h 0m	02:45:00	1h	01:05:00	6:00 PM	5:48 PM	On Time Left Early	- No reason provided -

That's how the TLT plugin works. But there is so much more Teamnio can do inside Moodle!
Let's go into the activity tracking plugin!

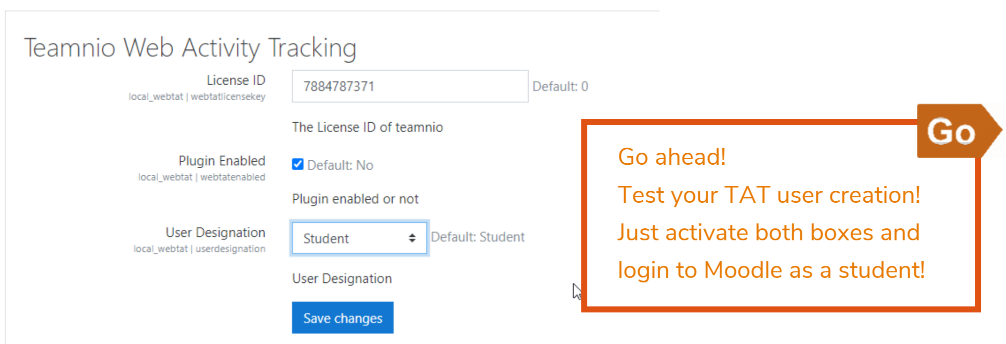
5.5. Activity Tracking (TAT)

The TAT plugin tracks activities and resources (ARs) on a course and student basis. This generates several reports that can be used by both the teaching staff and the students to improve their performance and optimize their efforts.

5.5.1. TAT – Moodle setup

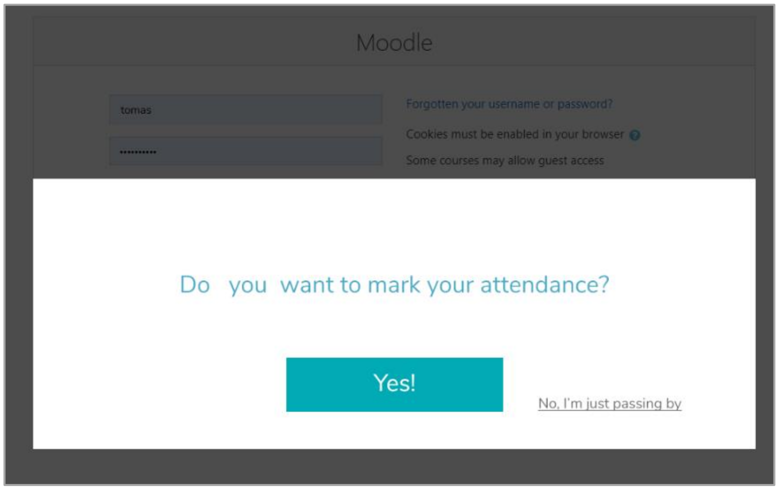
1. Let's go to **Moodle's Admin Account**

2. Go to the **Dashboard** and go to **Site Administration** and select the **Plugins tab**
3. To access the TAT plugin, select ***Teamnio Web Activity Tracking***
4. **Fill** the plugin configuration screen
    a. In the ***License ID*** field, copy your License ID.
    Remember, this number was included in the last confirmation email from the Registration Process
    (see 1.2.8b)
    b. **Activate** the ***Enable Teamnio Tracking*** checkbox to start tracking Moodle activities and resources
    Since TAT includes TLT, the user creation preference (Open/Restricted Mode) will be carried over from the TLT settings (see 5.4.1.c)
    c. **Select** a user type from the ***User Designation*** checkbox. We recommend selecting ***Student*** this time.
    d. Finally, confirm by **clicking *Save Changes***

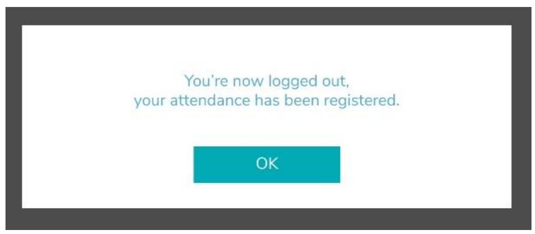


5. It's time to **test Open Mode**
    a. **Still in Moodle,** create a dummy student account. Let's say that the student's username for that account is Tomas Fontan
    b. Open an **incognito browser window** and **log in to Moodle with the dummy credentials**
    This will effectively create a user within Teamnio.

c. Before granting access, the following pop up will show



d. **Click Yes** to continue.
From this point onward, the TAT plugin will track this student's activity within Teamnio!
e. Once inside, the attendance tracker will show on the right-hand panel.
f. Let's logout from Moodle for now. We will see the following pop-up



6. That's it! Teamnio's TAT functionality has been integrated into Moodle.

5.5.2. TAT – Student's Teamnio apps (empty)

The following steps are just a demonstration to see the empty account of the student inside Teamnio.
These are not necessary as a setup step. To continue testing the TAT plugin, go to section 5.5.3. Moodle Content Synchronization

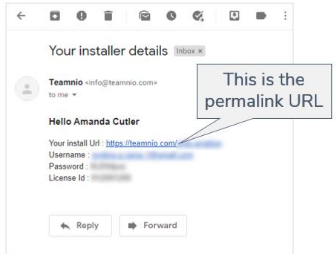
1. Let's go to the student's computer to see the initial state of Teamnio's apps

TEAMNIO
Student's computer

The following steps require that the student's account is first created, using any of the 4 available methods.
We recommend TAT Open Mode because it is completely automatic.

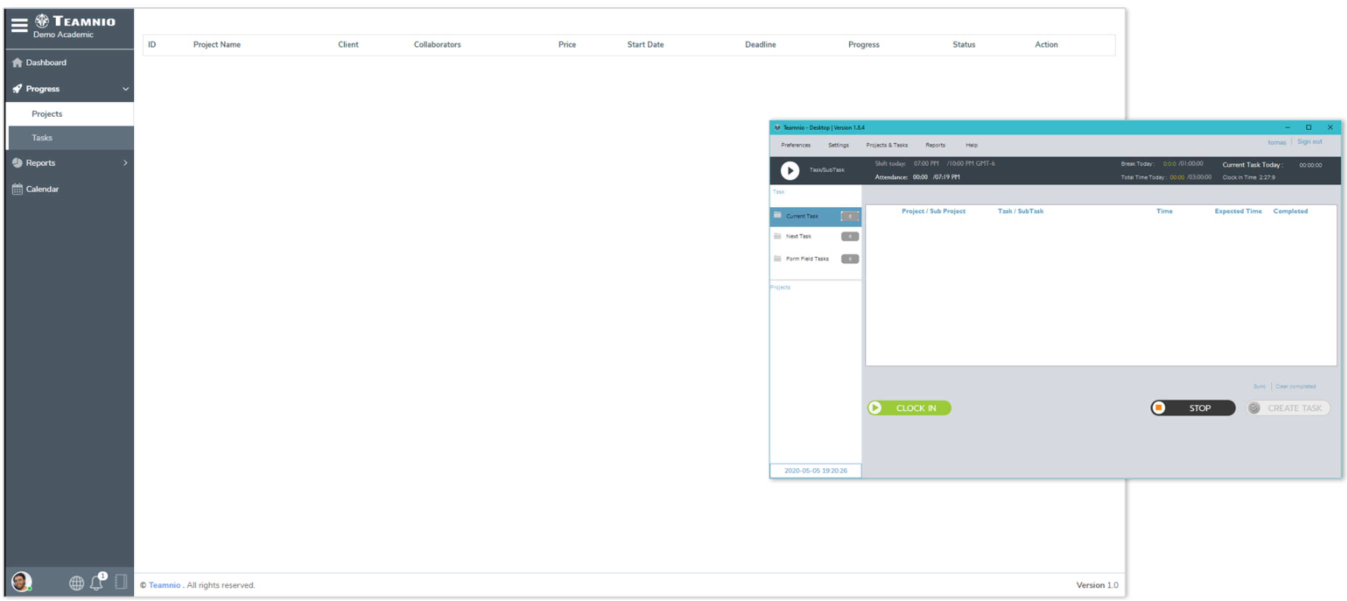
Method	Who performs it?	Type
TAT Open Mode	System (Moodle) (Authorized by the system)	1-by-1 (automatic)
Badge Import	Admin (Imports file to the web app)	Many at once (manual)
External	User (Creates account from the front-end) Admin (Authorizes the account from the web app)	1-by-1 (manual)
Internal	Admin (Creates and Authorizes the account from the web app)	1-by-1 (manual)

2. Let's access Teamnio's web app
   - Go to the organization's **Permalink URL** and **sign in using the student's credentials**
     Remember, this URL was included in the confirmation e-mail after finishing the registration
     (see the end of section 1.2)



   - Once inside, go to ***Progress > Projects*** or ***Progress > Tasks***
   - The image below shows an example of its empty look.
3. If we sign in to Teamnio's desktop app, we'll notice that it's empty too
   Remember that this action requires to enter the License ID included in the confirmation e-mail from the registration process (see 1.2. step 9), as well as the student's Teamnio credentials

Both the web app and the desktop app are currently not showing any projects or tasks because we haven't synced any Moodle content.
That's our next step!



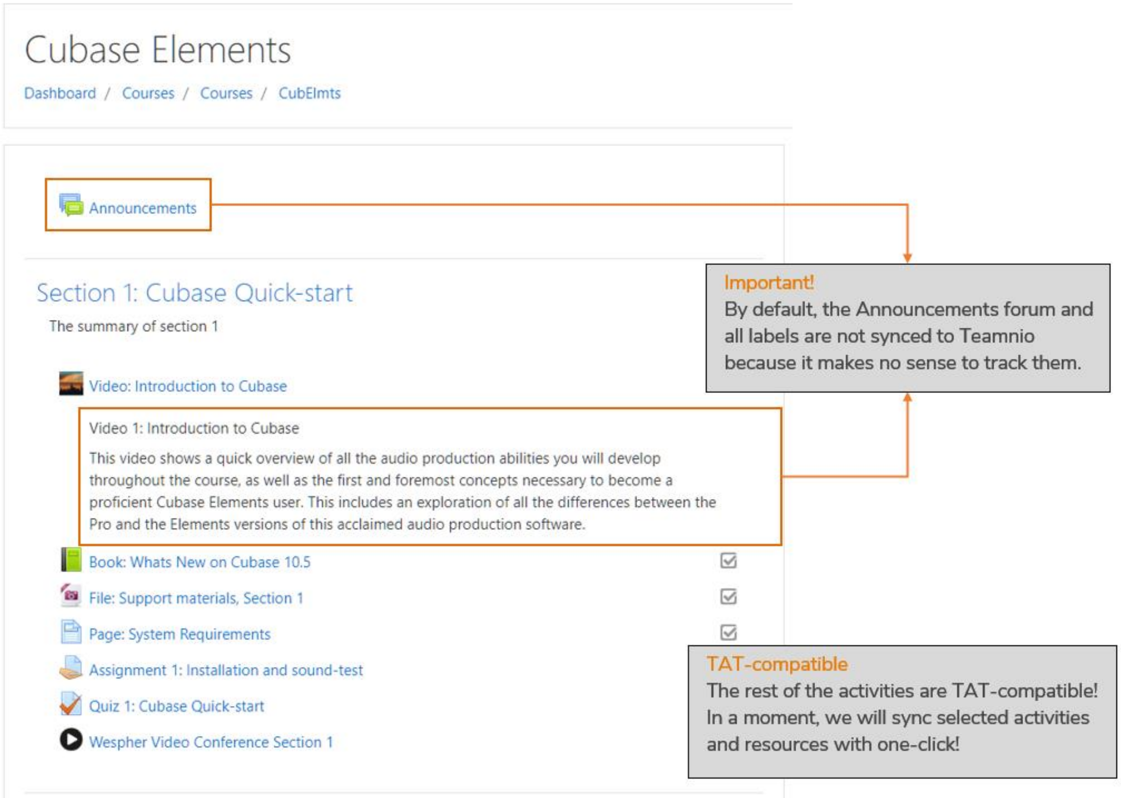
5.5.3. TAT – Moodle Content Synchronization

Remember how we tested Teamnio's projects and tasks in section 4?
It's possible to use them for tracking students' activity within Moodle.
The TAT plugin automatically creates a full project structure that contains all of the activities and resources within a course.
Let's make it happen with a single click!

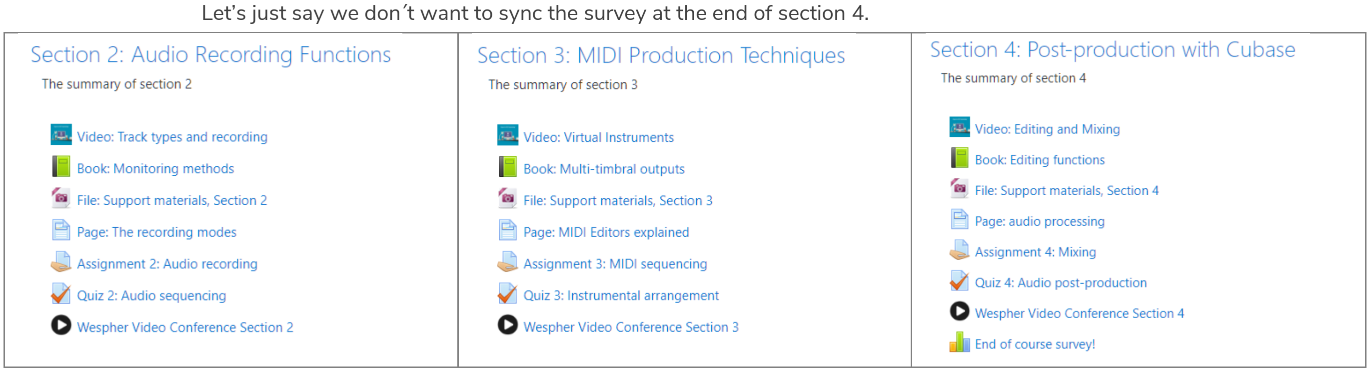
1. First, we have to **go to Moodle's Admin Account**.

2. Let's **go to any course** that we want to sync with Teamnio.
   For this demonstration, we'll use a course called "Cubase Elements"

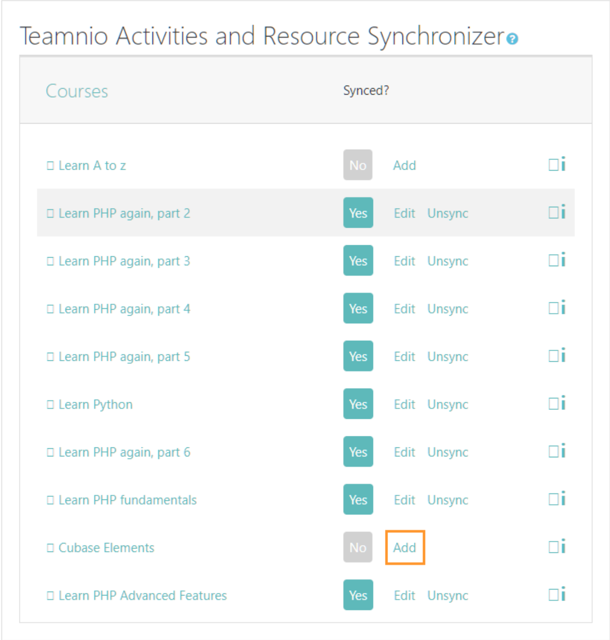
In the image below, we can see that this is a regular course, with many activities and resources, including third-party plugins for video and conferencing.
In a moment, we'll sync all the content with one-click!



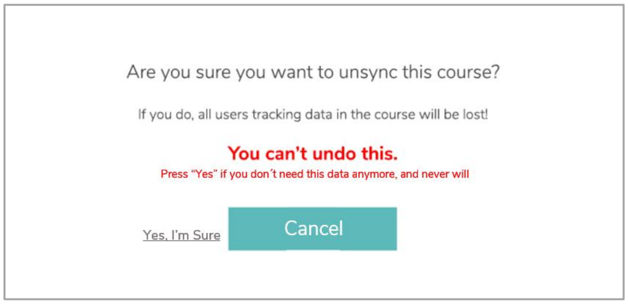
3. Let's take a look at the remaining three sections of the course, which content we'll also synchronize in a moment
All of the shown activities and resources can be tracked.
Let's just say we don´t want to sync the survey at the end of section 4.



4. Let's sync the course to Teamnio
    a. First, we have to access **Teamnio Activities and Resources Synchronizer** for the TAT plugin
    The screen shows the course list to the left and the sync functions to the right
    b. To sync the course, press the ***Add* button**
    (For this demonstration, we´ll do that for the course called Cubase Elements)

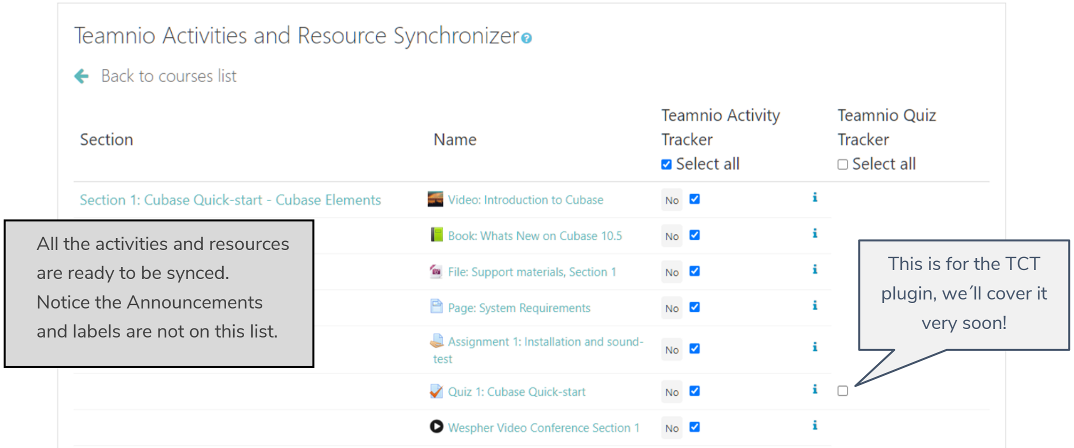


    c. Before proceeding it's important to understand the <u>*Unsync button.*</u>
    As its name conveys, this button eliminates all the synchronization between the course and Teamnio
    If we click it, we will get the following warning. Notice the phrase in red letters:
    <u>this action can´t be undone after it's confirmed.</u>



    Now, let's sync the course's activities.
    d. To do that, click the ***Edit* button** located to the right of the Yes button

e. This is the Sync editor. Here, we can see all the TAT-compatible activities and resources.
By default, none of them are synced in the Teamnio Activity Tracker column,
Click the Select *All* checkbox for the Teamnio Activity Tracker column
That's it!
All of the course's content is now synced between Moodle and Teamnio.



f. After doing that, we can **click *Unsync* to remove any unwanted element** from the list
Let's see the rest of the sections
The one-click sync activated TAT for all of the content, including third-party plugins such as:

- Think Blue's Video resource, and
- Wespher Video Conferences

The only element we're not going to sync is the survey at the end of section 4

g. To sync the items to Teamnio, **click Submit**

h. As a result, all the items will show as synced, and they can be excluded from the sync by pressing the unsyinc button.

i. After verifying that we have all the synced items needed, we can proceed to setup TAT on Teamnio's side To finish, click **Back to courses list**

Teamnio Activities and Resource Synchronizer

Sychronizationed successfully.

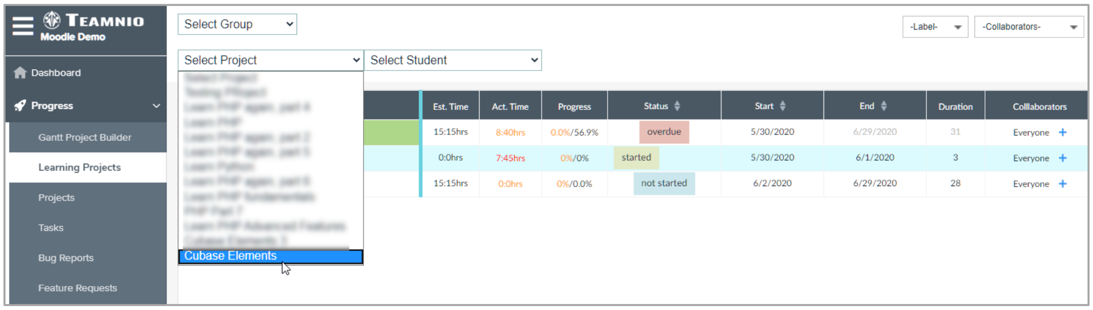
Back to courses list

Section	Name	Teamnio Activity Tracker Select all	Teamnio Quiz Tracker Select all
Section 1: Cubase Quick-start - Cubase Elements	Video: Introduction to Cubase	Yes Unsync	
	Book: Whats New on Cubase 10.5	Yes Unsync	
	File: Support materials, Section 1	Yes Unsync	
	Page: System Requirements	Yes Unsync	
	Assignment 1: Installation and sound-test	Yes Unsync	
	Quiz 1: Cubase Quick-start	Yes Unsync	☐
	Wespher Video Conference Section 1	Yes Unsync	
Section 2: Audio Recording Functions - Cubase Elements	Video: Track types and recording	Yes Unsync	
	Book: Monitoring methods	Yes Unsync	
	File: Support materials, Section 2	Yes Unsync	
	Page: The recording modes	Yes Unsync	
	Assignment 2: Audio recording	Yes Unsync	
	Quiz 2: Audio sequencing	Yes Unsync	☐
	Wespher Video Conference Section 2	Yes Unsync	
Section 3: MIDI Production Techniques - Cubase Elements	Video: Virtual Instruments	Yes Unsync	
	Book: Multi-timbral outputs	Yes Unsync	
	File: Support materials, Section 3	Yes Unsync	
	Page: MIDI Editors explained	Yes Unsync	
	Assignment 3: MIDI sequencing	Yes Unsync	
	Quiz 3: Instrumental arrangement	Yes Unsync	☐
	Wespher Video Conference Section 3	Yes Unsync	
Section 4: Post-production with Cubase - Cubase Elements	Video: Editing and Mixing	Yes Unsync	
	Book: Editing functions	Yes Unsync	
	File: Support materials, Section 4	Yes Unsync	
	Page: audio processing	Yes Unsync	
	Assignment 4: Mixing	Yes Unsync	
	Quiz 4: Audio post-production	Yes Unsync	☐
	End of course survey!	No ☐	
	Wespher Video Conference Section 4	Yes Unsync	
		Submit	

5.5.4. TAT – Teamnio sync verification (One-Pager)

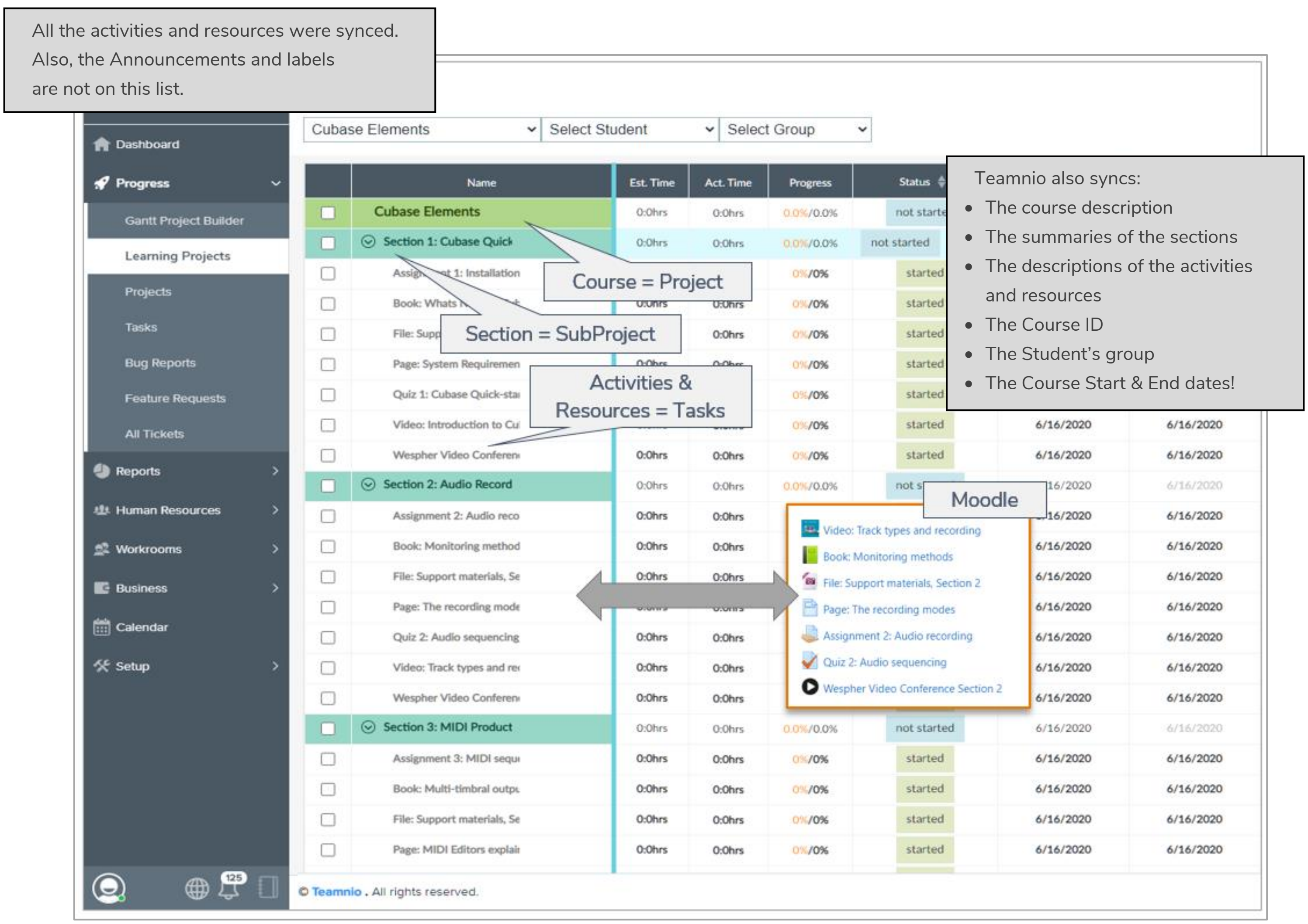
1. Let's go to Teamnio's admin account

2. Navigate to ***Progress > Learning Projects*** and use the **Select Project** dropdown to select the project



3. This is the result of the synchronization:
   - The Moodle course is a Project
   - Every section of the course is a SubProject
   - The activities and resources are Tasks. These first tasks are called "Main tasks" and they control the settings that are applied to the student's individual tasks, which become available after enrolling students in the course (see 5.5.5. and 5.5.6.)

The course is ready for activity tracking! Now we have to enroll some students.



5.5.5. TAT – Moodle enrollment and Teamnio user test

If we activate Open Mode (see 5.4.1.5) in the TLT configuration, the users that are enrolled in a Moodle course are automatically created in Teamnio when they login to Moodle.
Let's test an example.

1. Let's go to **Moodle's Admin Account** and **enroll a student in the course** we were testing before (called Cubase Elements)
2. After that, open an incognito browser window and **log in to Moodle using the student's credentials**.
   Thanks to Open Mode, a new user was created within Teamnio
3. Let's **verify** that. Login to **Teamnio's Admin Account**, go to **Setup > Organization** and search for the student's name
   The user was created successfuly.
4. Now, navigate to **Progress > Learning Projects**
   If we are already there when we enroll students in the Moodle course, we should press F5 to refresh Teamnio's browser window
5. As a result, **all the tasks for that user were added**. Note their name on the tasks' suffix.
   This is what happens in the background when the Moodle course is syncronized to Teamnio. Now, all we have to do is to plan the course (see 5.5.6.), and check out the reports generated by the students' activity (see 5.5.7.).

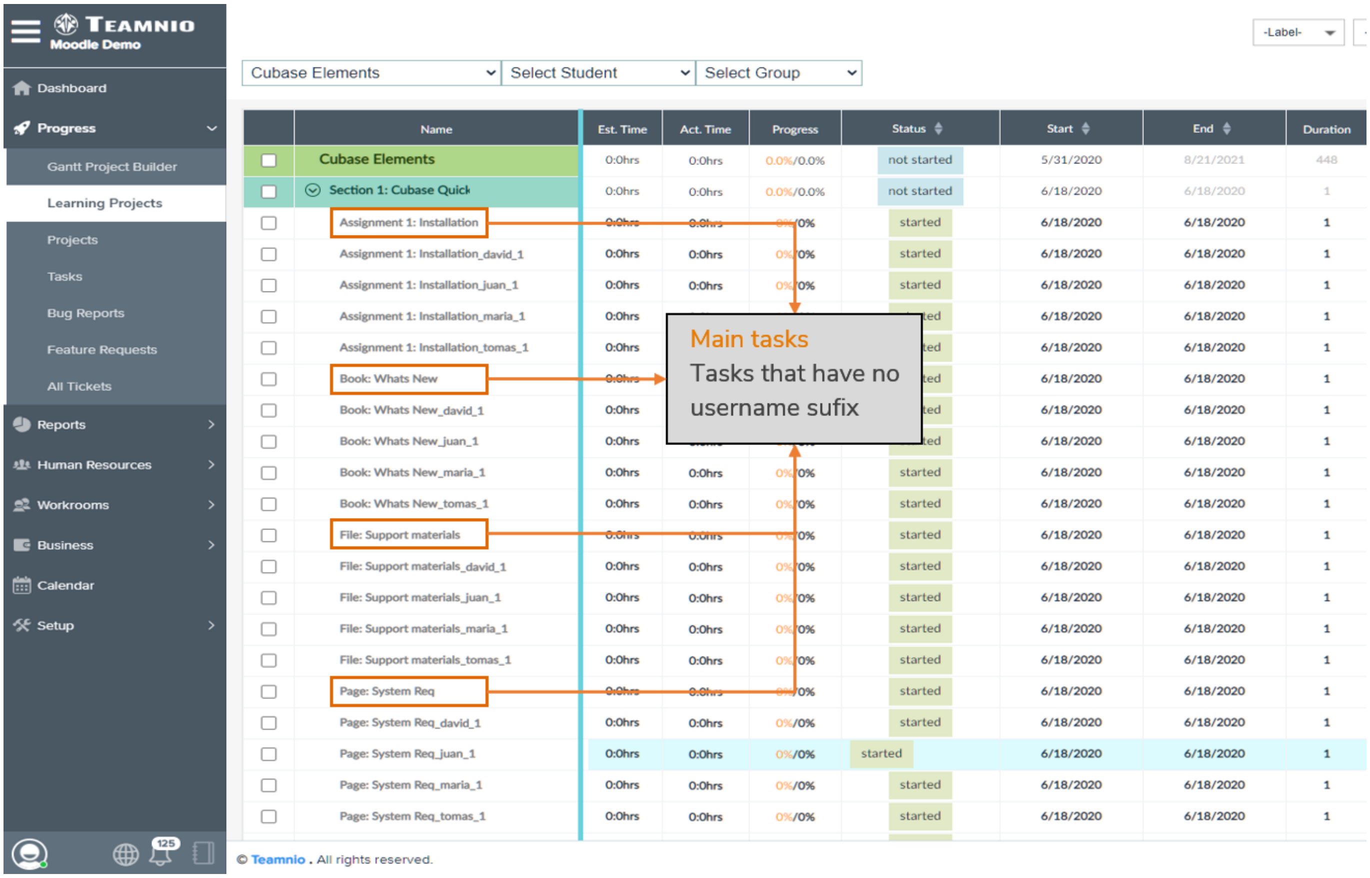
5.5.6. TAT - Class planning in Teamnio

Teamnio can be used for class planning! This is achieved by setting the duration time for every activity.
This duration can be used by the students as a performance reference.

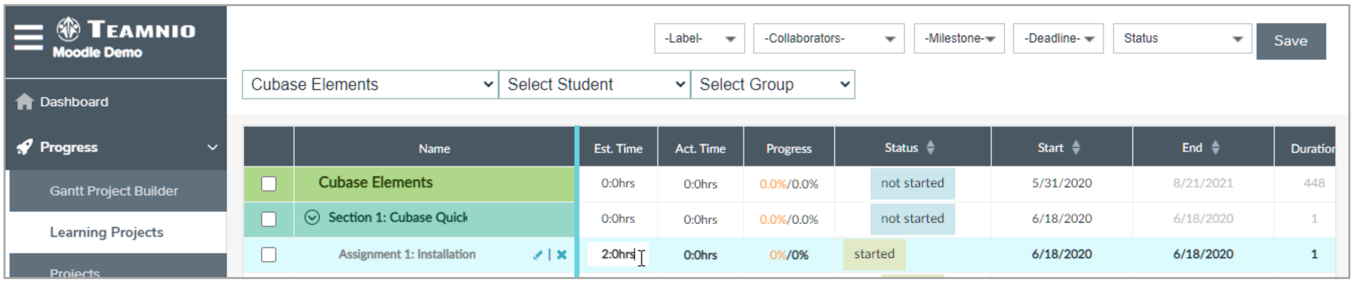
1. First, go to ***Progress > Learning Projects*** and use the **Select Project** dropdown to select the project
   Let's see the most important parameters on this view and how they help us to map out the course throughout the calendar!

	Name	Est. Time	Act. Time	Progress	Status	Start	End	Duration
☐	Cubase Elements	0:0hrs	0:0hrs	0.0%/0.0%	not started	5/31/2020	8/21/2021	448
☐	Section 1: Cubase Quick	0:0hrs	0:0hrs	0.0%/0.0%	not started	6/18/2020	6/18/2020	1
☐	Assignment 1: Installation	0:0hrs	0:0hrs	0%/0%	started	6/18/2020	6/18/2020	1

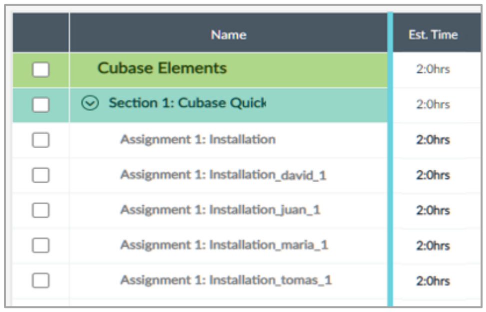
   a. Estimated Time is set by the instructor for every activity and resource.
   b. Actual Time is tracked by Teamnio on the student's computer for each activity and resource
   c. Progress is the difference between the estimated and the actual times
   d. The Status parameter changes from Not Started, to Started, to Completed, according to the user's progress in the course. Teamnio uses Moodle's Activity Completion to automatically mark activities as complete
   e. Finally, the Start parameter is the date for every activity and resource. We can update the course's start date and the dates for all activities and resources are changes accordingly!
2. Let's **set up the estimated times** for each activity within section 1 of this course
   To do that, we need to use the main tasks. By default, the course shows one instance of each task for all of the enrolled students. The name of the user is shown at the end of each task.
   Notice how all the items in the estimated time column are showing 0.0 hours. We're about to change that!


Teamnio
Moodle Demo
Dashboard
Progress
Gantt Project Builder
Learning Projects
Projects
Tasks
Bug Reports
Feature Requests
All Tickets
Reports
Human Resources
Workrooms
Business
Calendar
Setup
Cubase Elements
Select Student
Select Group
-Label-
Name
Est. Time
Act. Time
Progress
Status
Start
End
Duration
Cubase Elements
Section 1: Cubase Quick
Assignment 1: Installation
Assignment 1: Installation_david_1
Assignment 1: Installation_juan_1
Assignment 1: Installation_maria_1
Assignment 1: Installation_tomas_1
Book: Whats New
Book: Whats New_david_1
Book: Whats New_juan_1
Book: Whats New_maria_1
Book: Whats New_tomas_1
File: Support materials
File: Support materials_david_1
File: Support materials_juan_1
File: Support materials_maria_1
File: Support materials_tomas_1
Page: System Req
Page: System Req_david_1
Page: System Req_juan_1
Page: System Req_maria_1
Page: System Req_tomas_1
not started
started
Main tasks
Tasks that have no
username sufix
© Teamnio . All rights reserved.

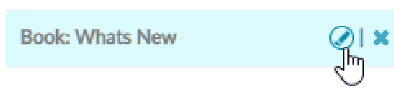
3. There are two ways to do set up the estimated time, either directly or in the edit dialogue
    a. **In the first main task:**
        i. **Go to the "Est-Time" column**
        ii. **Click on the timer to enter a 2-hour duration, and**
        iii. **Click the Save button** on the top of the screen



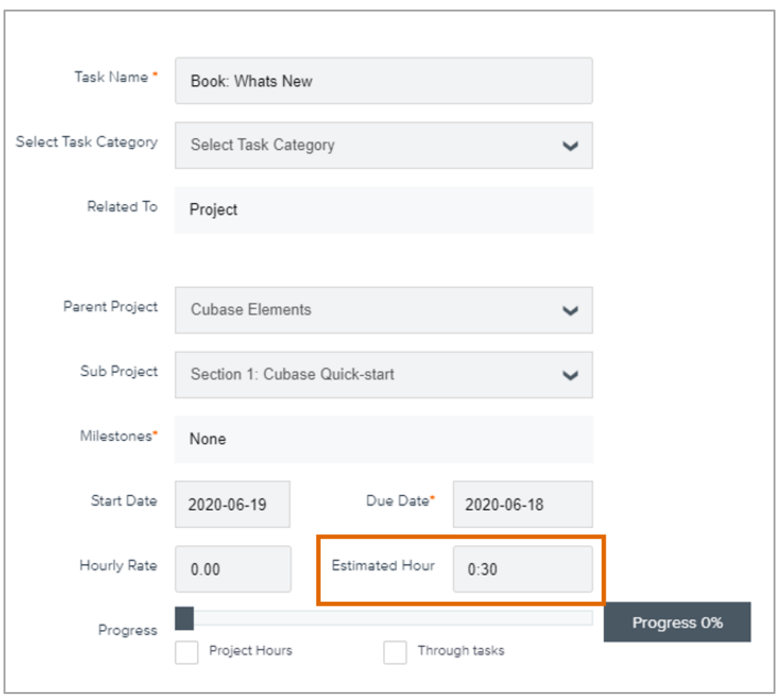
        iv. As a result, the same duration is applied to all the iterations of the task



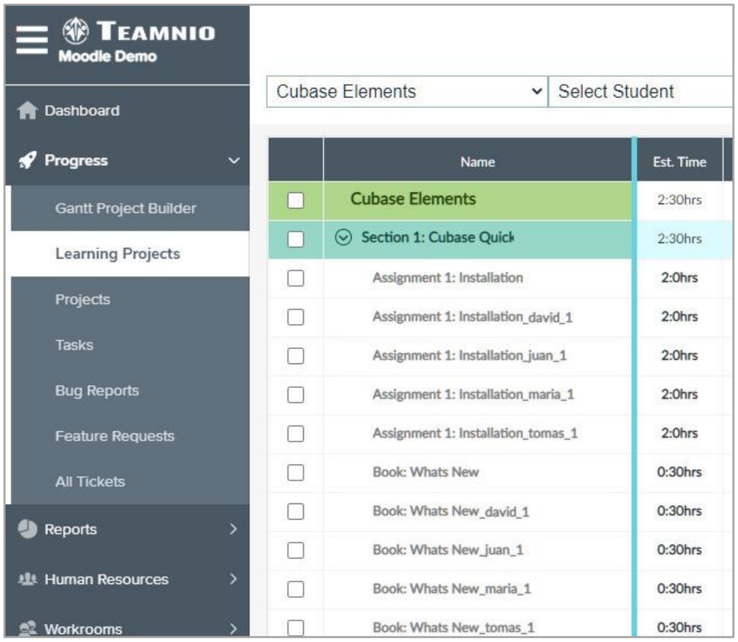
    b. **Now, go to the second main task:**
        i. **Click the edit button**



        ii. **In the pop-up dialogue, go to Estimated Hour, type 30 minutes and click Save**



iii. This way, all the iterations are also set up to the same Estimated Time
Also note that the Estimated Duration of the course is calculated automatically



4. By repeating this process, the instructor can set up the estimated times for the whole course!

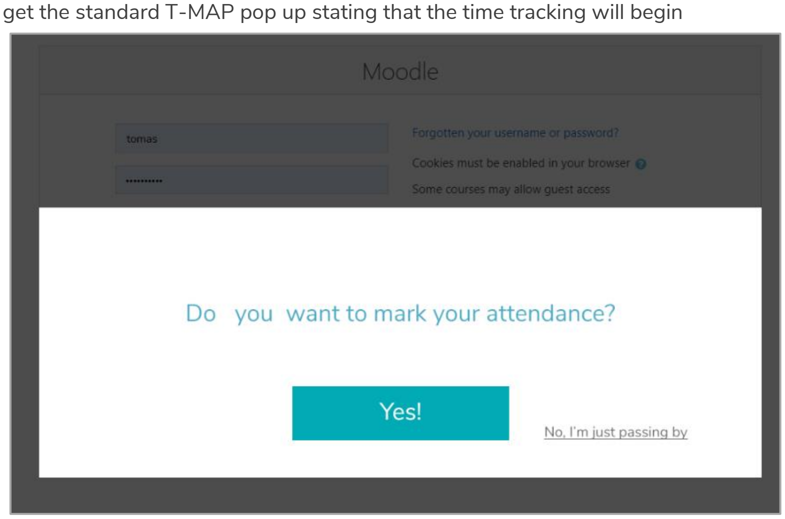
5.5.7. TAT – Reports

Let's test the system on the student's computer and see how their activity shows on Teamnio's administrator account.

1. First, let's go to the student's computer and **sign in to Moodle**.

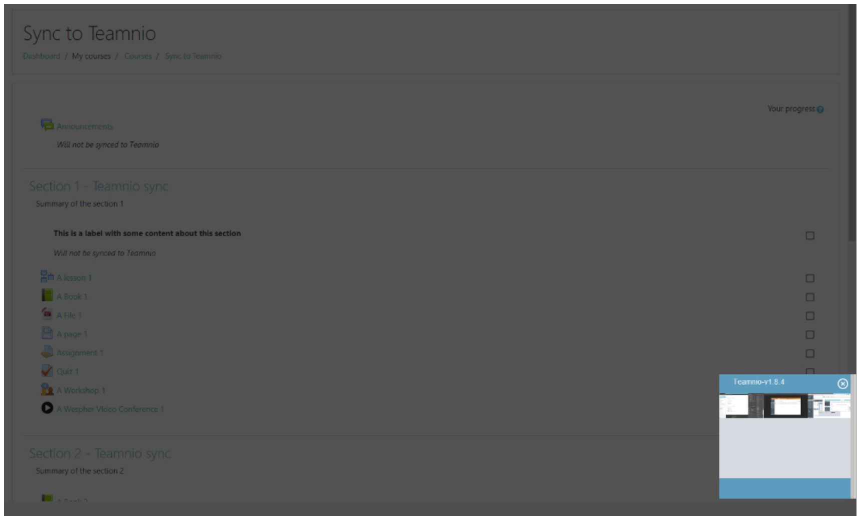
moodle
Student's Account

2. They will get the standard T-MAP pop up stating that the time tracking will begin

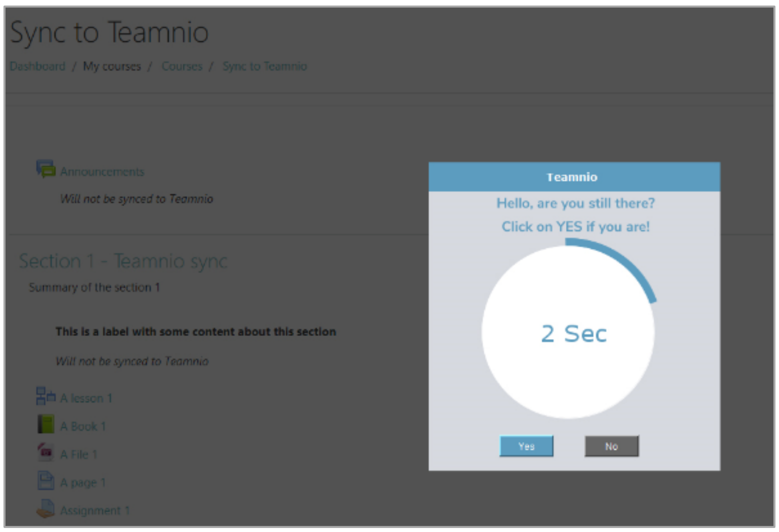


(Remember that the student can OPTIONALLY use the Desktop App. All the items they complete within Moodle will be automatically synced to Teamnio, no matter if they open the desktop app or not)

3. At this point, the student starts studying the course's content
4. Teamnio's counter on the right-hand panel will start tracking their activity on each of the course's activities and resources
5. Depending on the time tracking settings we have configured, Teamnio will start taking screenshots of the student's screens. A pop-up at the bottom of the screen will notify the user about it.



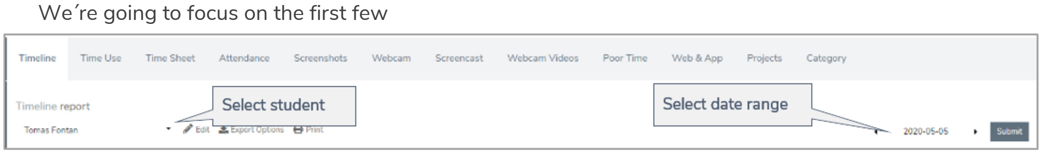
6. Another likely function that the student will experience, is the inactivity pop-up
   Depending on the time we set on the Time Tracking settings, this warning message with a countdown will show when the student stops moving the mouse or typing.



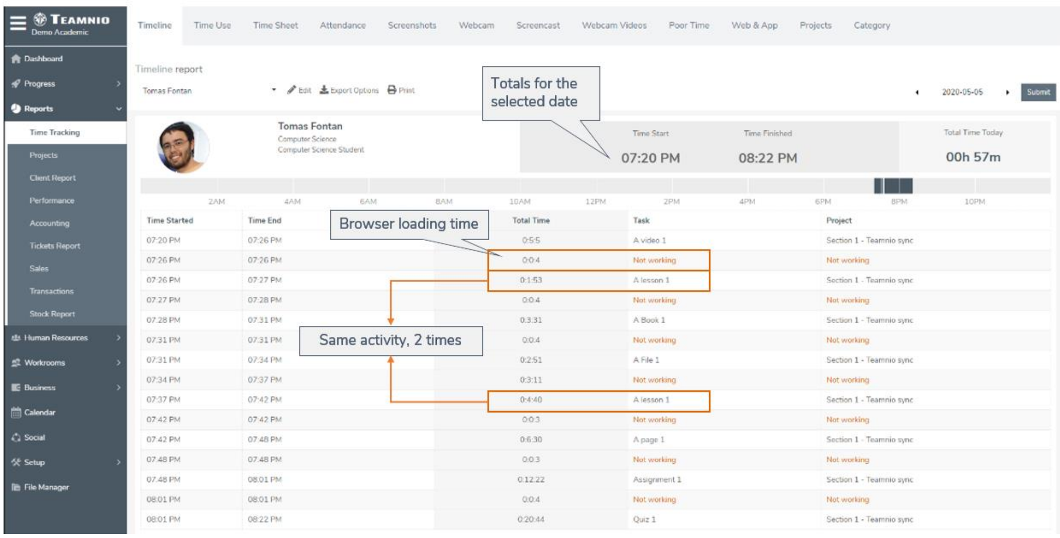
7. Now let's see how the student's tracked activity reflects on Teamnio's reports

TEAMNIO
Admin's Account

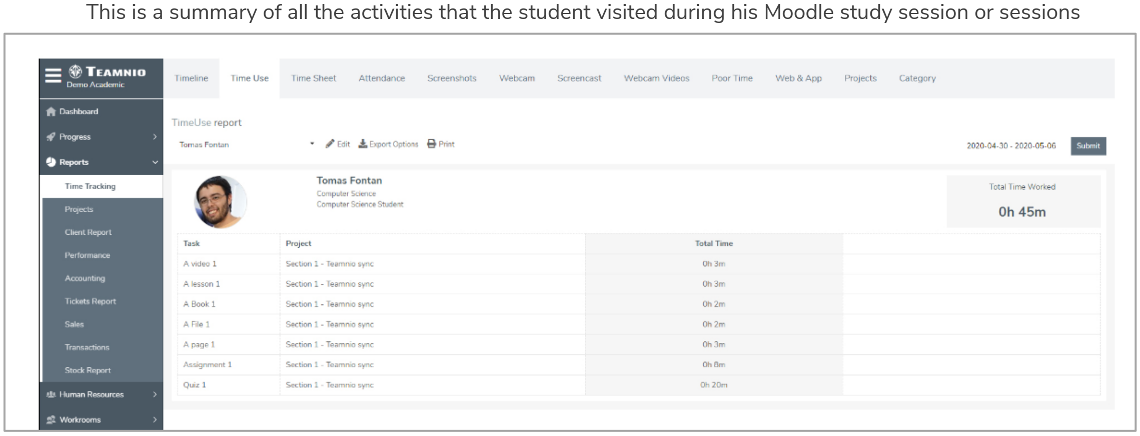
8. Go to ***Reports > Time Tracking***
9. All of the following reports can be filtered by selecting student names on the top left, and date ranges on the top right. We´re going to focus on the first few



10. By default, the ***Timeline Report*** is the first one that shows when accessing the Time Tracking module
    Here, we can see all of the student's actions within Moodle.
    - At the top, we see the student's details and the totals for the day
    - Down below, each row of the table shows the start and end times, as well as the total time that the student worked on a specific activity.
    - The activity and the course are listed on the Task and Project columns respectively
    - Let's analyze some interesting details about this report
        - The first row shows that he dedicated 5 minutes to watch a video activity
        - Then, there are several rows showing spans of four seconds registered as "not working". These short spans represent the browser's loading time between activities in Moodle
        - Finally, it´s important to note that the student visited Lesson 1 two times. These times will be summed in the next report.



11. Let's click on ***Time Use***
    To set up this report, just select the user and the date range. Note that we can set this up for longer than one day, so it's a convenient resource to summarize the student activity and analyze their performance
    This is a summary of all the activities that the student visited during his Moodle study session or sessions

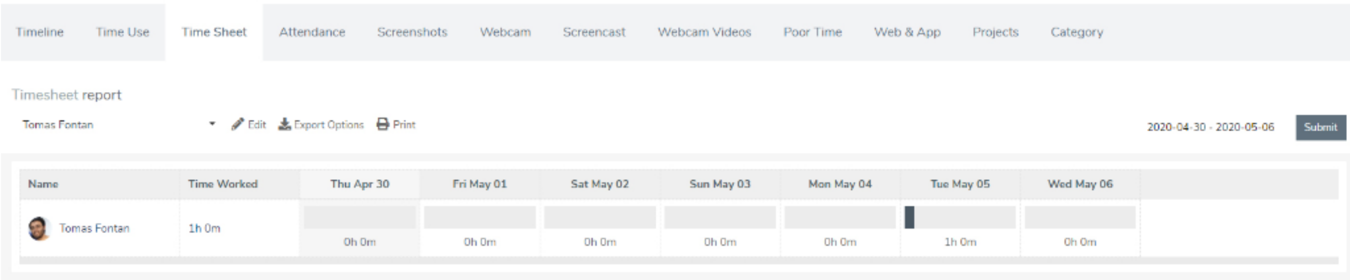


12. Now, let's go to the ***Time Sheet***

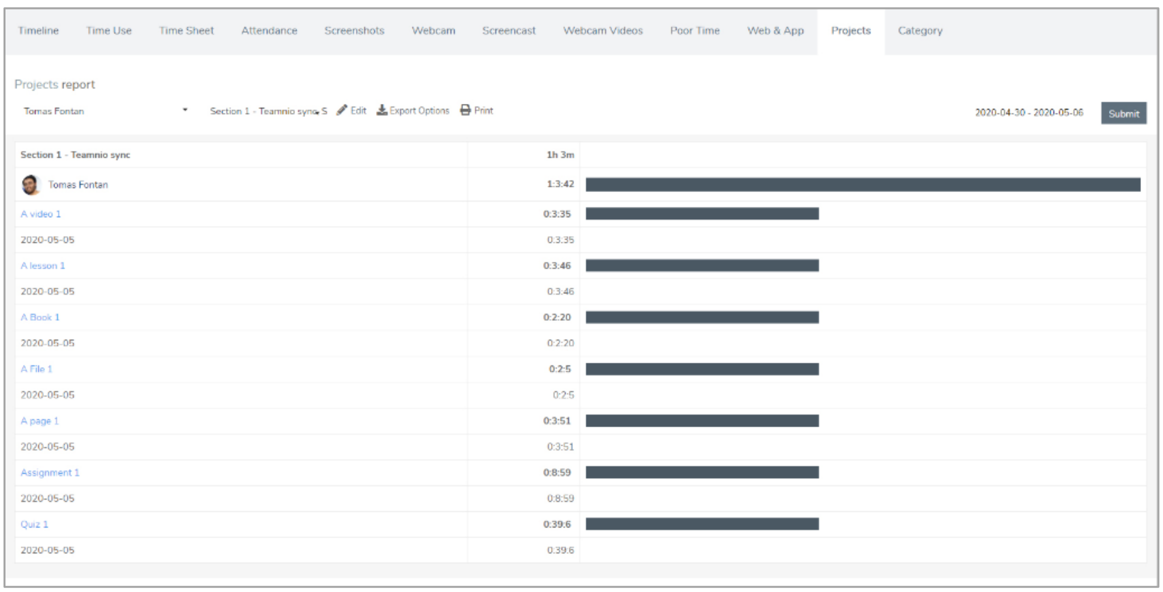
    To set it up, just select the student and the date range. More than one student can be selected to make quick comparisons.

    This report shows an even broader view of the student's activity through several days.

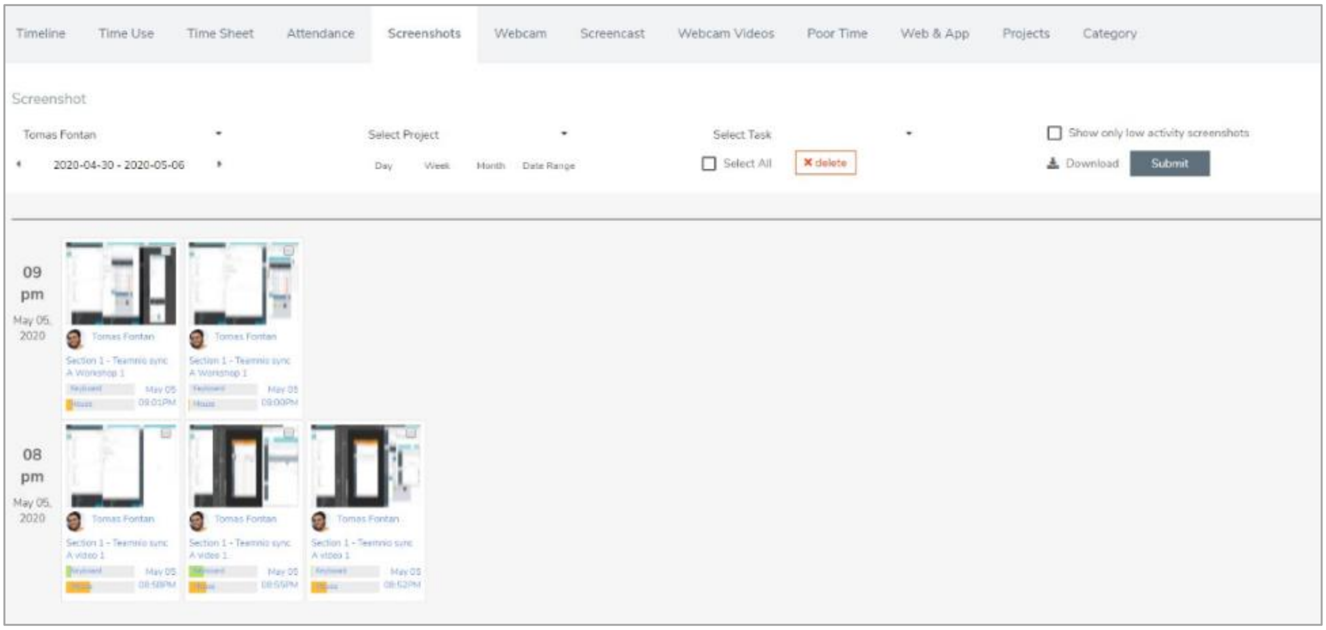
    The image shows how the report would look after the first day of class, with the time showing on just one day.



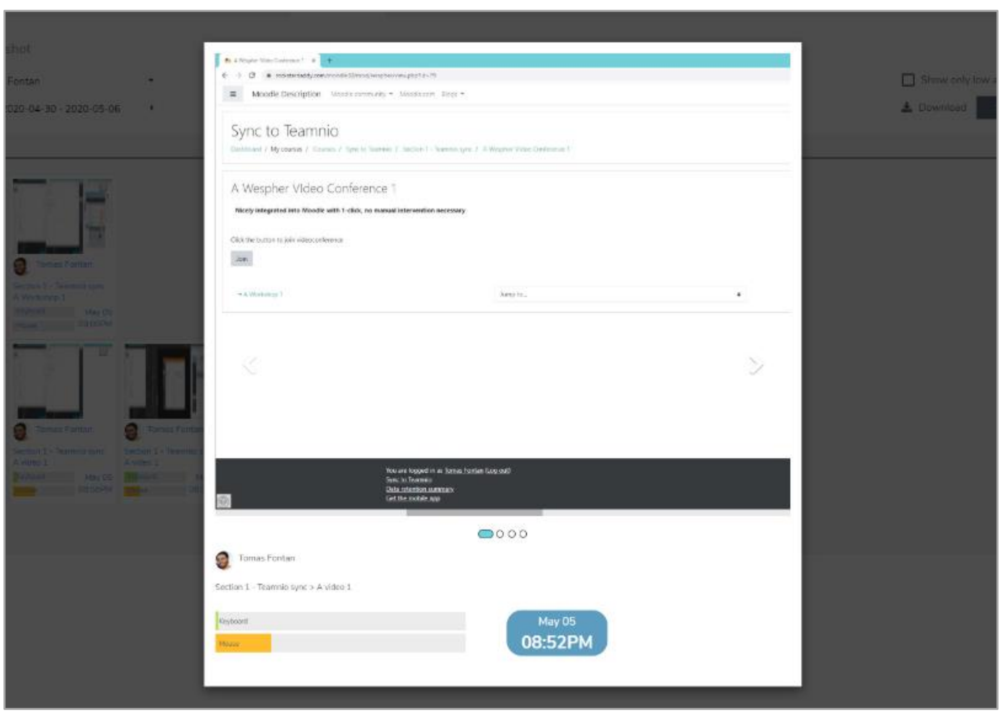
13. For another perspective on the student's activity, let's click ***Projects***
    - To set it up, we select the course and section from the dropdown at the top.
    - Then, select the date range and click submit.
    - This report shows how much time the student spent on every single activity for a single section of the course, with a summary of the time spent on different dates.
    - The upper graph shows the summed times for the whole selected section of the course.



14. Finally, **click on *Screenshots***
    - In the top section, this report offers some parameters beyond the standard name and date range. We can filter by course activities or resources, and even enable the checkbox to only show low activity screenshots.
    - The overview results are sorted by date and time. It's also important to note that Teamnio takes screenshots of all the user's screens. Tomas, for example, uses three, so they are all registered on each screenshot



    - Clicking on any record shows a dialogue with more details Here, for instance, we can see all of the student's screen with higher detail. The image confirms that the student was actually navigating Moodle.
    - The bottom section shows the mouse and keyboard activity. Keep in mind that Teamnio records the number of keystrokes, not the actual keys typed.



That's it! We're done tracking student's activity on with the TAT plugin.
Now let's see how to use Teamnio to optimize evaluations!

5.6. Certification Tracking (TCT)

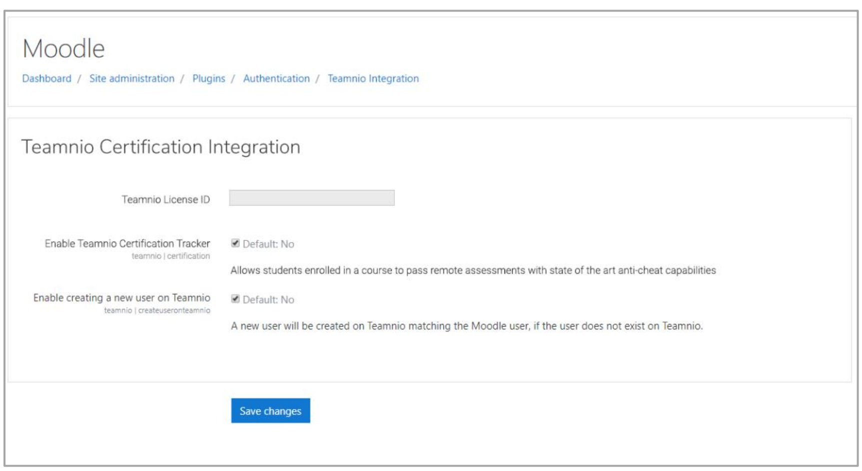
Teamnio's certification tracker consists of a cheat prevention engine for remote assessments. Basically, you add the TCT plugin to any activity that requires advanced and separate tracking settings. This separation makes TCT independent from the tracking settings available for TAT.
Based on the settings per student, TCT can track anything within Moodle's assessments, from attendance to video recording of the student's screen and webcam (screencast and webcast, respectively)
Let's jump right to it!

5.6.1. TCT - Moodle Setup

1. Let's go to Moodle's admin account and from the ***Dashboard***
2. Go to the **Dashboard** and go to **Site Administration** and select the **Plugins tab**
3. Access the TAT setup screen by selecting ***Teamnio Certification Integration***
4. **Fill the configuration screen**
    a. In the ***License ID*** field, copy your License ID.
    Remember, this number was included in the last confirmation email from the Registration Process
    (see 1.2.8b)
    b. **Activate** the ***Enable Teamnio Certification Tracker*** checkbox to start tracking Moodle graded assessments, like quizzes and exams
    c. **Decide** whether to activate the ***Enable Creating a New User on Teamnio*** checkbox.
        i. Check the box to activate Open Mode
        ii. Or uncheck it to activate Restricted Mode
        For this demonstration, we´ll **activate Open Mode**

> Important!
> Unlike TLT and TAT, TCT syncs users when they start an attempt on a synced assesment
> **Open mode:** Teamnio users are automatically created when your students start a synced quiz
> **Restricted Mode:** allows you to decide who can track their assesments.
> You create the Teamnio users.

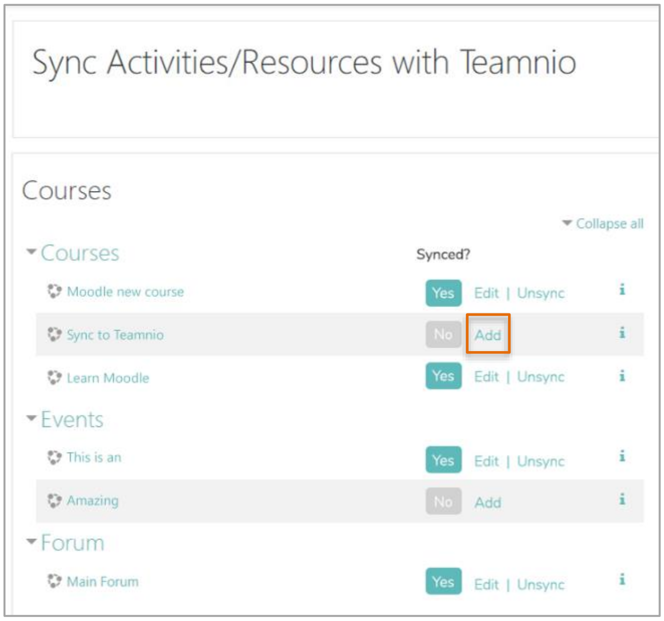
    d. Finally, confirm by **clicking Save Changes**



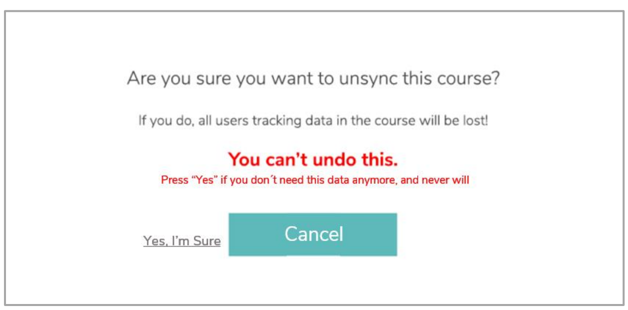
5. It's time to **test Open Mode!** To do that, we first have to sync the graded evaluations.

5.6.2. TCT - Moodle assessment synchronization

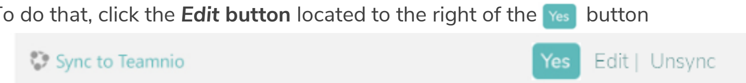
1. Let's sync a couple of graded assessments
    a. First, we have to access **Sync Activities/Resources with Teamnio** for the TCT plugin
    The screen shows the course list to the left and the sync functions to the right
    b. To sync the course, we just press the **Add button**
    (For this demonstration, we´ll do that for the course called Sync to Teamnio)
    That's it! All of the course's content will now show on the student's Teamnio apps as an easy-to-follow list of tasks



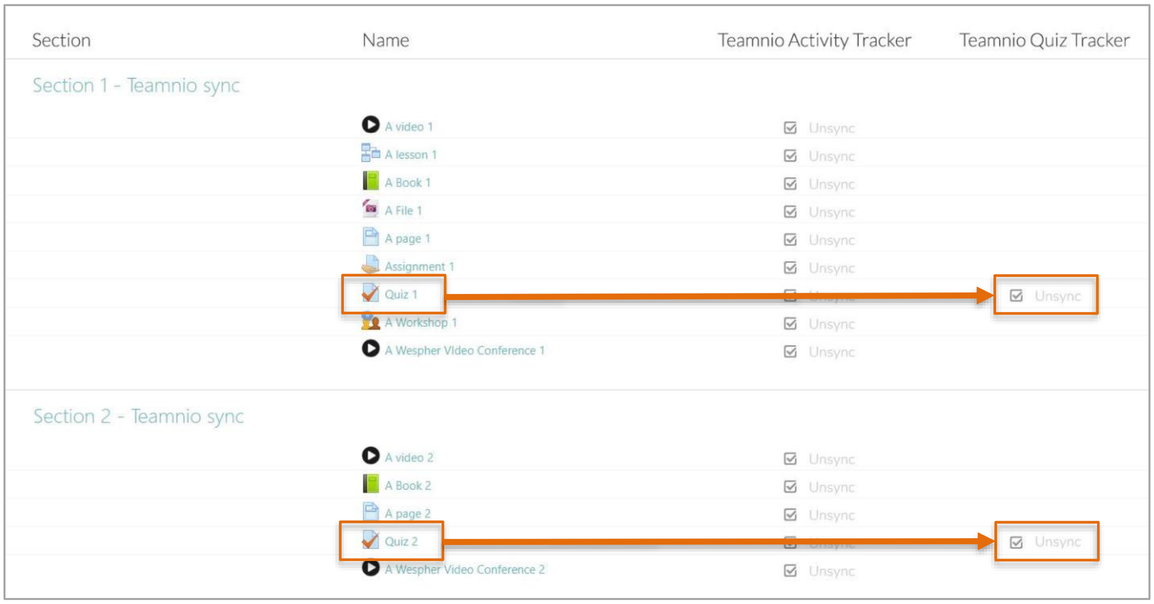
    c. Before proceeding it's important to understand the <u>Unsync button.</u>
    As its name conveys, this button eliminates all the synchronization between the course and Teamnio
    If we click it, we will get the following warning. Notice the phrase in red letters<u>: this action can´t be corrected after it's confirmed.</u>



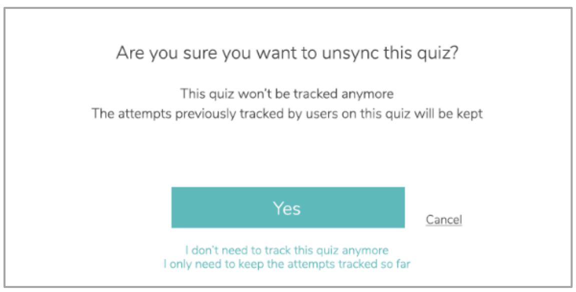
    a. We can customize TCT even further by **selecting the exact assessments** we want to sync.
    b. To do that, click the ***Edit* button** located to the right of the Yes button



d. This is the Sync editor
Here, we can see all the TCT-compatible assessments
By default, they're all synced in the Teamnio Quiz Tracker column, and we can click Unsync to remove any element from the list.



e. We can turn off the tracking for any assessment by clicking the Unsync button
This action does not erase any previously tracked attempts. Teamnio saves all previous records.



f. After verifying that we have all the synced items needed, we can proceed to set up the TCT settings

5.6.3. TCT – Teamnio setup

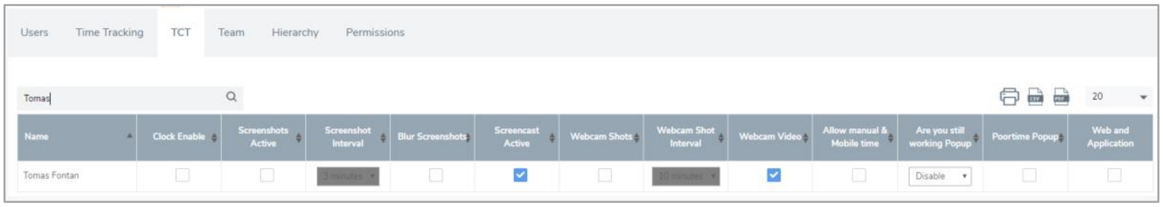
TCT can create assessment tracking records for existing users. If the student doesn't have a Teamnio user, a new one can be created automatically by activating Open Mode (see section 5.6.1.). The following steps will show you how to create tracking settings even for those students who don´t yet have a Teamnio user.

1. Let's go to the **Teamnio's Admin Account**

TEAMNIO
Admin's Account

2. Navigate to ***Setup*** > ***Organization*** > **Time Tracking** and click the **TCT tab**

3. Let's set up for an existing student first. **Search for the student** by typing their name on the search field up top
4. This is where we verify the user's tracking settings for graded assessments
   Remember, we are just verifying these settings because we already created a default TCT template for all new users (see section 5.3.1.)
   As a minimum, we recommend activating Screencast Active and Webcam Video. These settings record video from the student's screens and webcam.



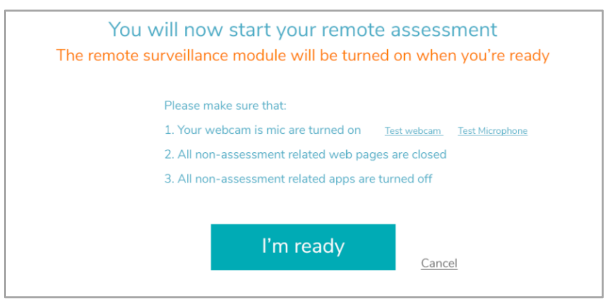
5. Great! Now we´re ready to test the TCT plugin!

5.6.4. TCT - Testing phase

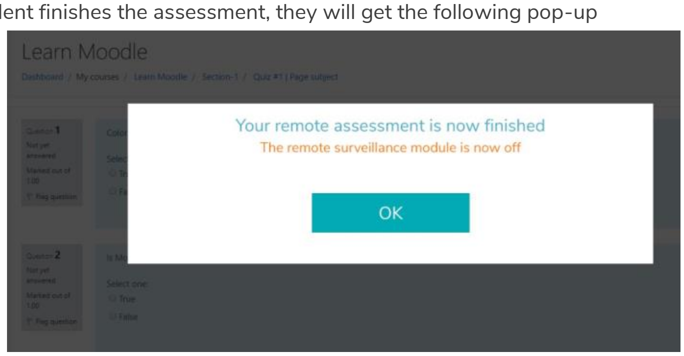
1. Let's login to Moodle with a dummy student account and access the course we just synchronized with TCT

   moodle
   Student's Account

2. Now, we should access any of the graded quizzes we just synchronized
3. Upon doing that, TCT will show this pop-up
   If Open Mode is active within the TCT plugin's settings and the student doesn't have a user in Teamnio, the system will automatically create one for them.
   If the Restricted Mode is active, only the students with an active Teamnio account will see this pop-up and be allowed to track their quiz attempt.
   After clicking ***I'm ready***, the quiz attempt will be tracked according to the TCT settings for the student's Teamnio account



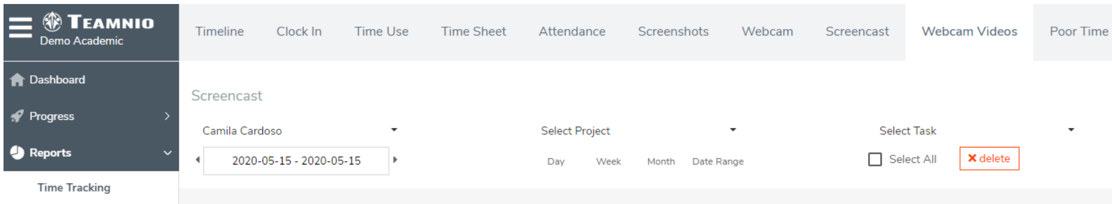
   At this point, the student can proceed with the assessment as usual
4. When the student finishes the assessment, they will get the following pop-up



   Ready! The quiz has been tracked remotely and securely, with Teamnio's cheating prevention technology
5. Let's go back to Teamnio's admin account and check the remote surveillance records, depending on what we set before

TEAMNIO
Admin's Account

6. The tracking records can be found at ***Reports > Time Tracking.*** The two most important are Screencast and Webcam Video
   On these reports, we can check the student's activity during the test to make sure they abide by the institution's rules for graded assessments

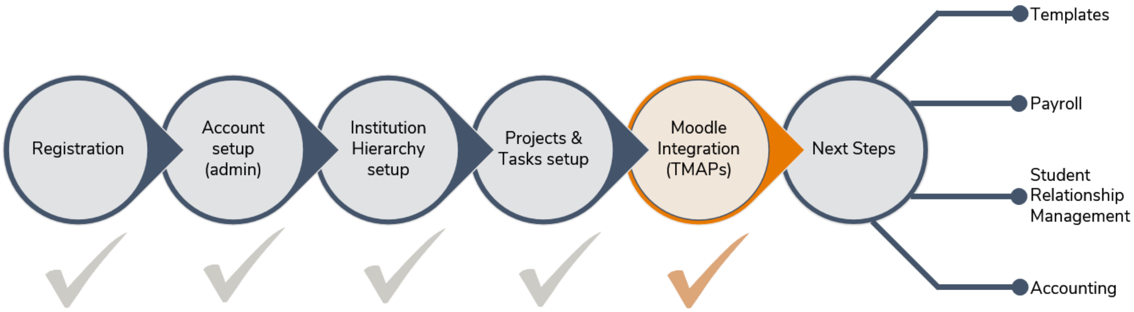


7. That's it! We're ready to start tracking graded assessments through TCT.

5.7. Presto!

We're done with the five main setup steps!

From this point onward, we can dive into the Next Steps sections in any order we want:
Do you want to explore Templates, Payroll, Client Accounts, or Accounting?



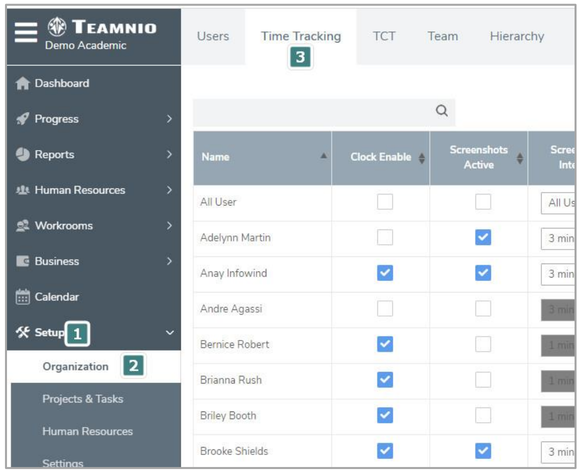
Next Steps: Templates

With Teamnio, we can avoid having to repeat the same configuration more than one time. This is the power of templates!

T1. Time Tracking Templates

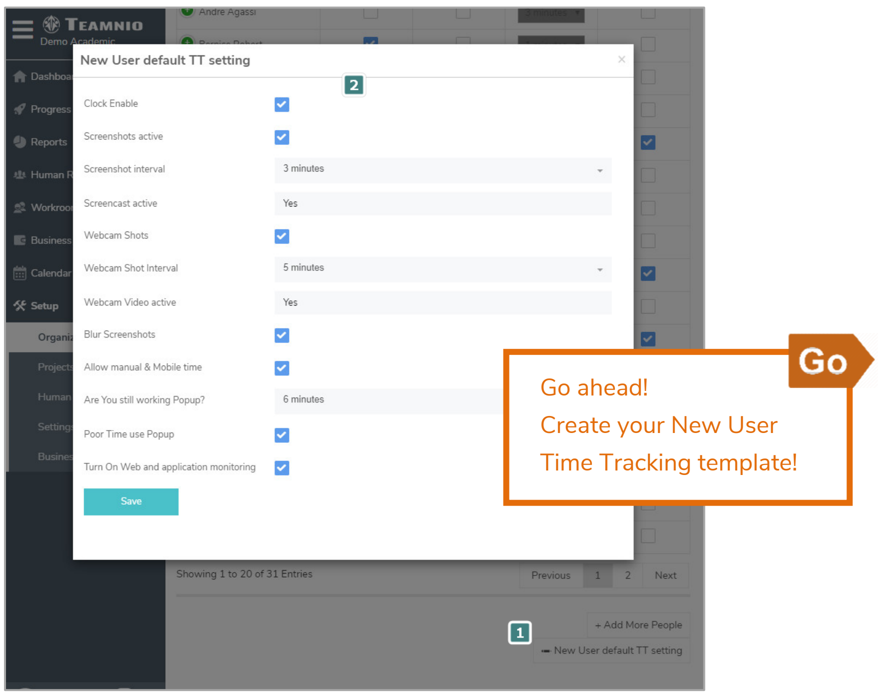
Let's say we´re registering 30 new students. All of them should have the same Time Tracking and TCT settings. We can save time by setting up a template for that! In other systems, the administrator would have to create and set up every account, but we're using Teamnio,
so we´re going to work smart!

1. Let's go to ***Setup > Organization > Time Tracking***
   This list shows the Time Tracking settings of all registered users



a. Let's **scroll down** and at the bottom right, **click *New User Default TT Setting***

b. In the pop-up dialogue, **set up the template** by enabling and configuring all the required parameters



c. **Click Save** to confirm

2. Now, all we have to do is ask each user to create their own account (see section 3.5.2. External User Creation)
   We're done! In just a few minutes we've finished creating 30 accounts with the same TT setting.

T2. Project Templates

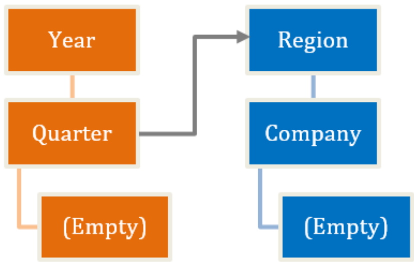
Creating tasks and projects takes time and a careful design effort.
Let's put the same amount of work towards creating templates that we can use to save time in the future!

T2.1. P&T template design

To create an effective template scheme, we first have to design it. Remember, Teamnio offers up to six levels, three for Projects, and three for tasks.

	The PROJECT DOMAIN (Management)	The TASK DOMAIN (Operations)
Level 1	Project	Task
Level 2	Sub-Project	Sub-Task
Level 3	Sub-Sub-Project	Sub-Sub-Task

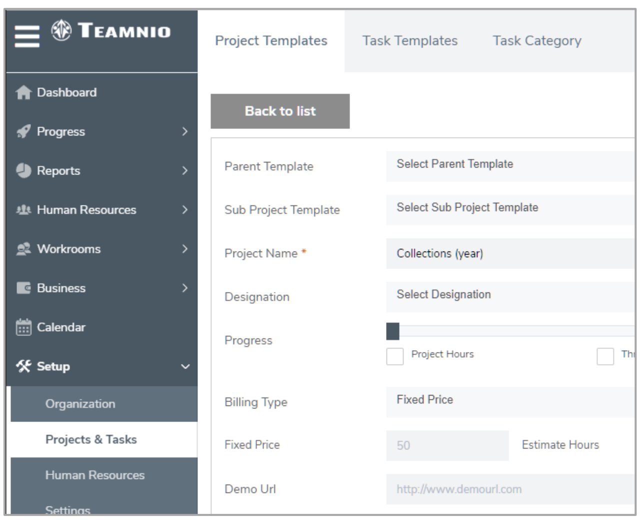
Let's use the scenario from the previous sections (the collections project) and set up a template for it.



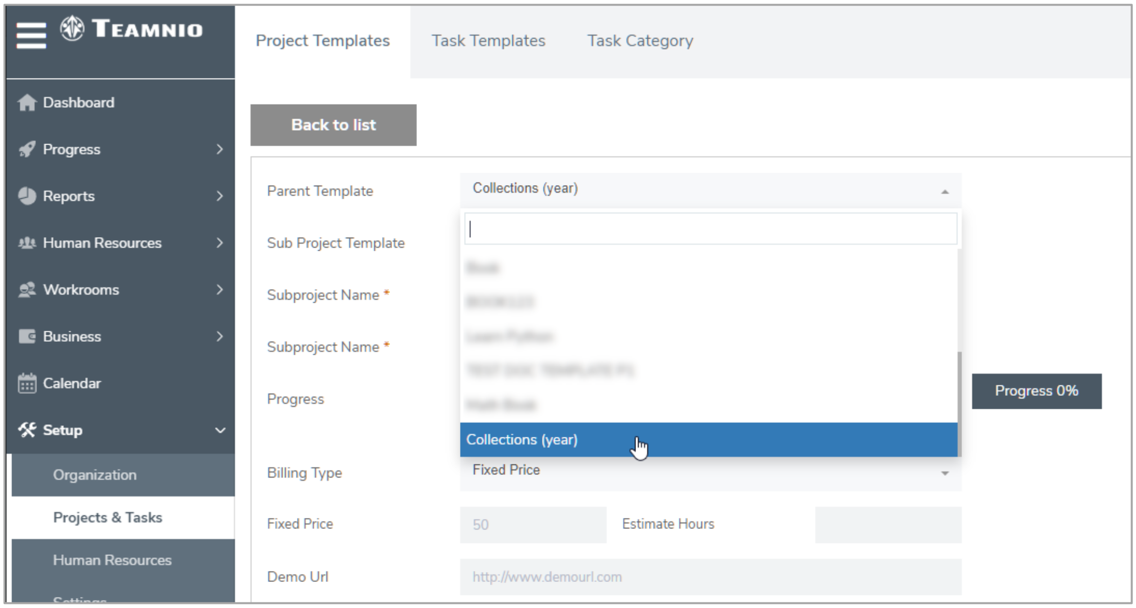
T2.2. Project Templates

We already planned the template design (see T4.1.), so all we need to do is to create a task template that includes two levels.

1. Go to ***Setup > Projects & Tasks.***
2. In the **Project Templates** tab, click **New Template**
3. **Fill the** project template **form**. For the first level, we just have to Name it.
   In this case, let's type *Collections* and a placeholder for the year



4. Click Save and go to create another project template, this one is for level two of our design. In the form:
   a. Select the previous template for the ***Parent Template*** field
   b. **Type** the ***Sub-project Name***. In this example, we should type Collections Q1

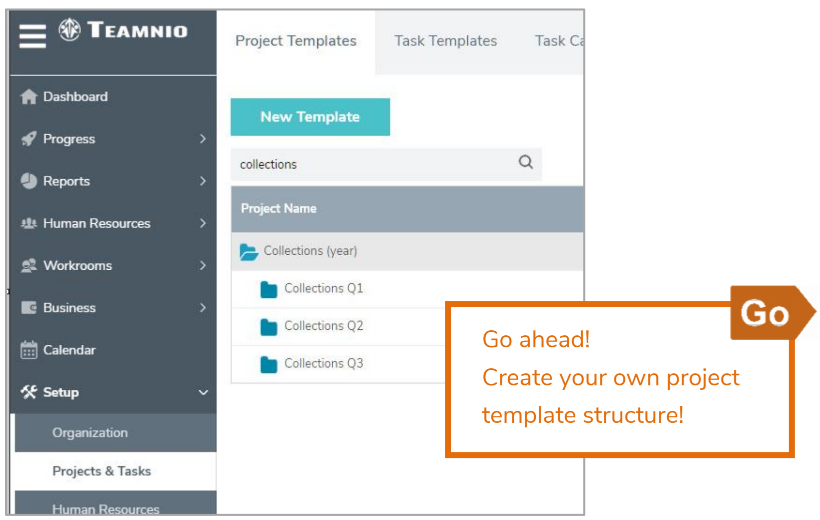


c. To proceed, **click Save**

d. Next, we should **repeat the steps** to create two more sub-projects, for Q2 and Q3

e. Let's confirm the structure. Use the **search field** to look for the project and click the plus symbol to expand its elements.

The result should show the following structure:

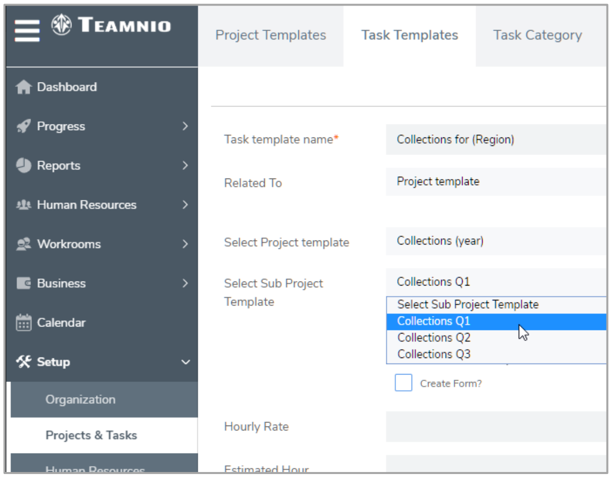


That's it for the project's structure. Let´s proceed with the task templates!

T2.3. Task Templates

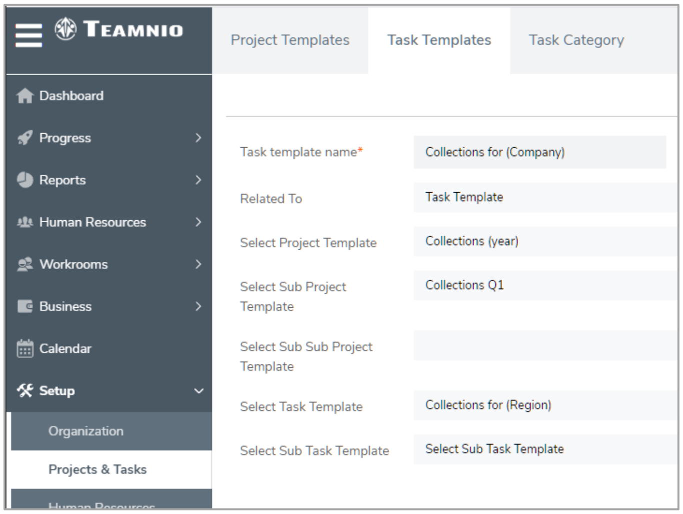
A task structure requires to have created a project structure (see T4.2.)

1. Go to ***Setup > Projects & Tasks.***
2. In the ***Task Templates*** tab, click ***New Task Template***
3. Type the ***Task Template Name***. To follow the structure we designed previously, it should be the word *Collections* and a placeholder for the region
4. Next, we should set up the structure
   a. In ***Related To, select Project Template***
   b. Then, select the ***Project Template*** we created before.
   c. This enables the ***Select Sub Project*** field. Select the first sub-project



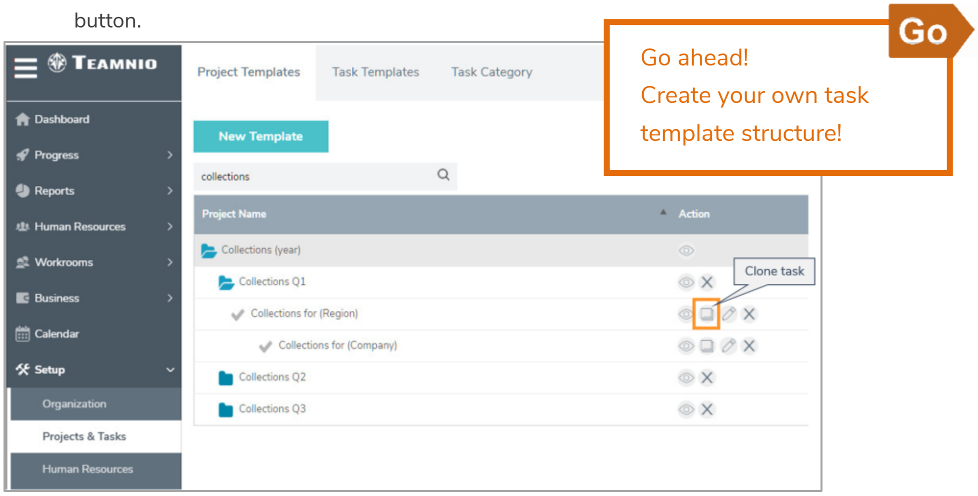
d. Confirm by **clicking *Save***

5. To load the sub-task template, we repeat the previous steps, but **Task Template** in the **Related To** field.
   a. The ***Task Template Name*** should reflect our design.
      In the example, this includes the word *Collections* and a placeholder for the *Company name*
   b. In the ***Related To*** field, select ***Task Template***
   c. And then, select the items corresponding to the designed structure.
      In this example, the structure should reflect the following image:



d. To save the sub-task template, **click Save**

e. Finally, let's confirm the structured template we just created.
   i. Go back to the ***Project Templates*** tab and search for the parent project
   ii. Now click on the plus signs to expand each level
   iii. Now, all we have to do is continue creating the rest of the tasks or subtasks to reflect the collections activity for a whole year. If any of the task templates need to be replicated, all we have to do is use the *Clone* button.



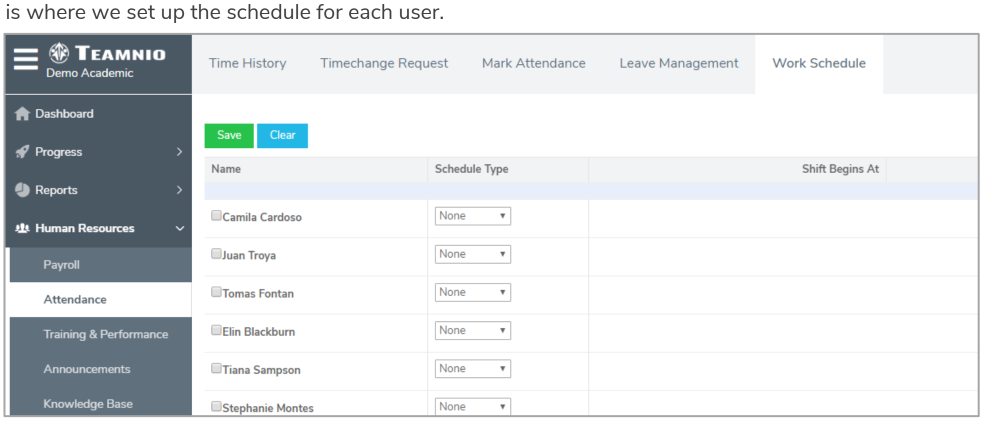
If we take the time to create proper templates like this, we´ll save time and guarantee a consistent workflow.

T3. Attendance Templates

For some institutions, attendance control is paramount. Teamnio allows us to establish shifts for all users, even for the students! Let's set it up!

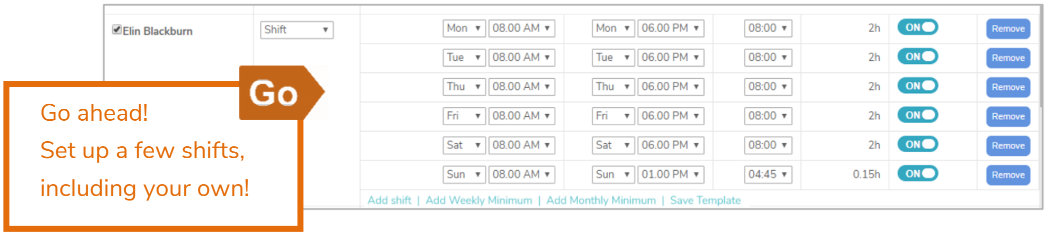
T3.1. Work schedules setup

1. Go to ***Human Resources > Attendance,*** and click on the ***Work Schedules tab***
   This is where we set up the schedule for each user.



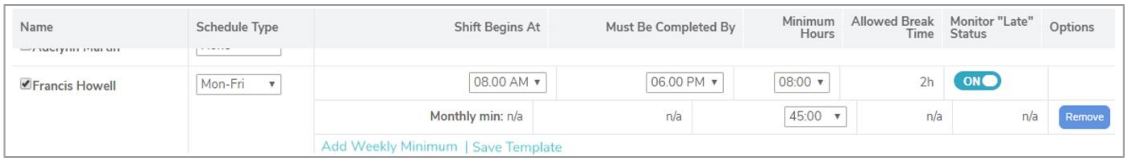
2. **Select the user** by enabling the checkbox
   a. Then, **select** the **Schedule Type**, for instance, **Shift**; and finally, fill the required information to specify the schedule.
   b. In this case, we have to select the **beginning and end of each shift**, the minimum hours, and the allowed break time for each day of the shift. We can even track the tardiness, in the **Monitor Late Status** column.
   c. For now, let's keep the default settings and just make one adjustment.
      Click the Remove button for Wednesdays and Sundays. In case we make any mistakes with this button, all we need to do is click *Add Shift* and make the necessary adjustments.

d. Let's **click *Add Shift*,** and select **Sunday,** set the hours from 8 a.m. to 1 p.m., and the minimum hours to 4:45.
This last action calculates 15 minutes for the **Allowed Break Time** column
Note the other buttons on the bottom row. The minimums are useful for added flexibility
Furthermore, we can use ***Save Template*** if we want to apply this same schedule for another user



Let's try those another template

3. Enable any other user and in the ***Schedule Type***, select ***Monday through Friday***
   a. A single line is added, which means the same shift is applied to the selected ***Schedule Type***
   b. In the ***Minimum Hours*** field, select 9. This sets up 1 hour for the ***Allowed Break Time*** value
   c. Finally, click ***Add Weekly Minimum*** and select 45 hours
   We could also add a monthly minimum, but we won't this time.



   d. Great! We're done!
   We can use the same flexibility to set up the schedules for any other user

4. To confirm the changes, click **Save**

5. Ask the users to **log out and log back in** to start tracking time under the loaded Shift data.
We´re done!
As a result of this configuration:
   - The users can see their shift information on the desktop app (See T3.2.)
   - The managers can track shift adherence from the web app (See T3.3.)

T3.2. Shift information on the Desktop App

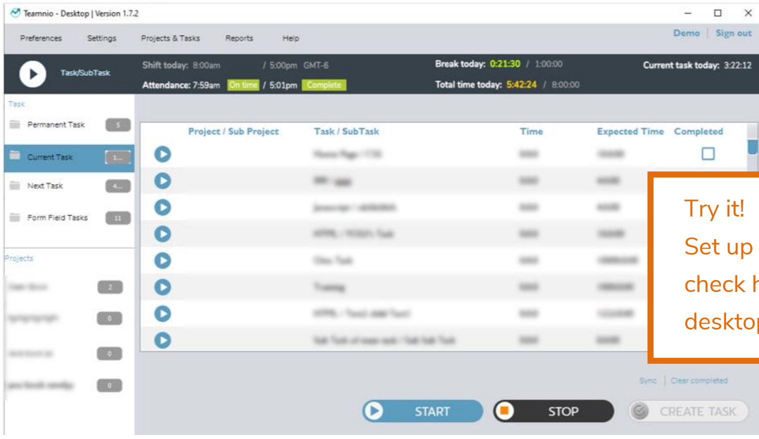
After setting up the user's shift, they will see it on their desktop app.
Let's see some examples of how the shift information shows on the time counter bar.

- The ***Shift Today*** information shows on the top left, with the **Attendance** timer below it. This timer registers the first start time and the last finish time registered within a single day.
- ***Break Today*** runs whenever the user presses the Pause button

- ***Total Time Today*** runs continuously whenever the user is tracking time on any task, and
- ***Current Task Today*** counts the time spent on the current task throughout the day

Also, every counter includes a time after a slash, colored in grey.

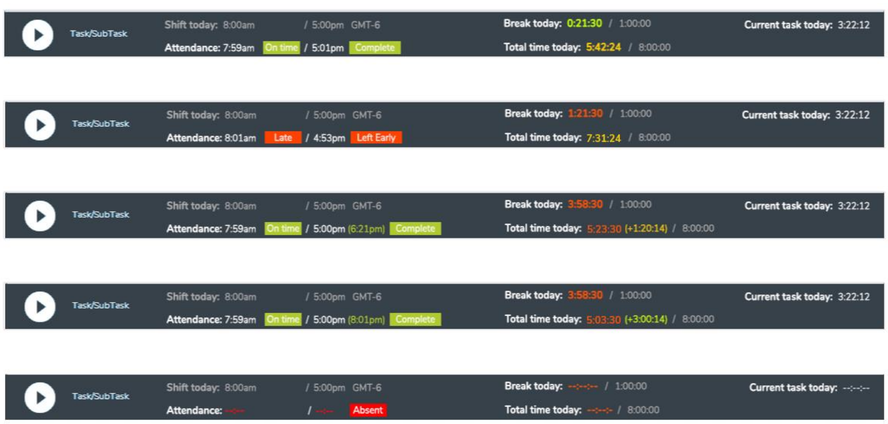
These represent the assigned times according to the user's shift for that day.



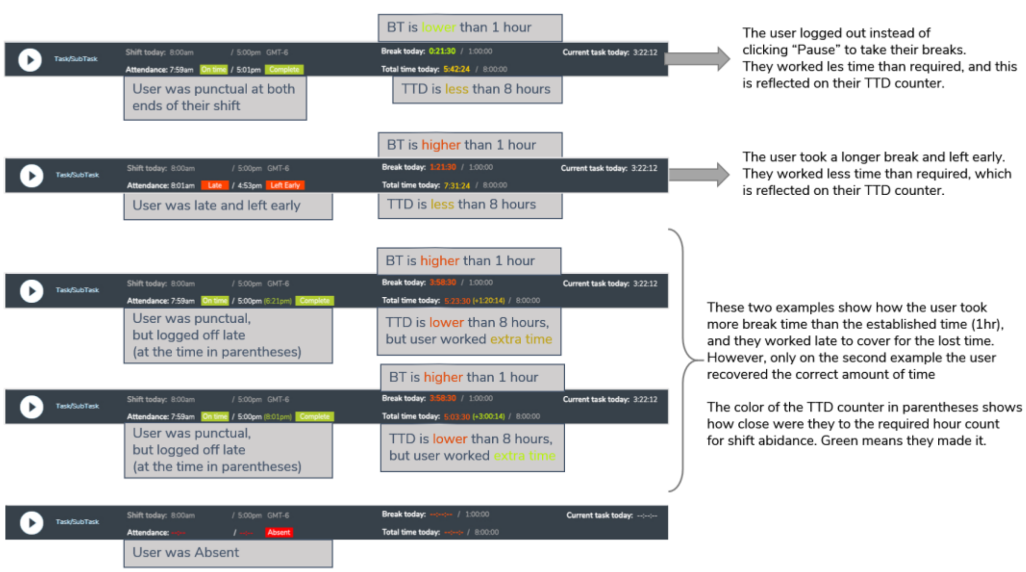
The timers also include feedback in the form of tags and colors. The following image shows several examples.

- The Attendance timer will show Late, Absent, Left Early, or Complete depending on the user's start and end times throughout the day.
- Colors in the green to yellow gradient mean the user abided by the assigned shift, while colors in the orange to red gradient mean the opposite.
- Extra time is shown in parentheses by the corresponding counter.

See if you can figure out the meaning of the tags and colors from the examples below:



The following image explains all the counters and visual feedback:



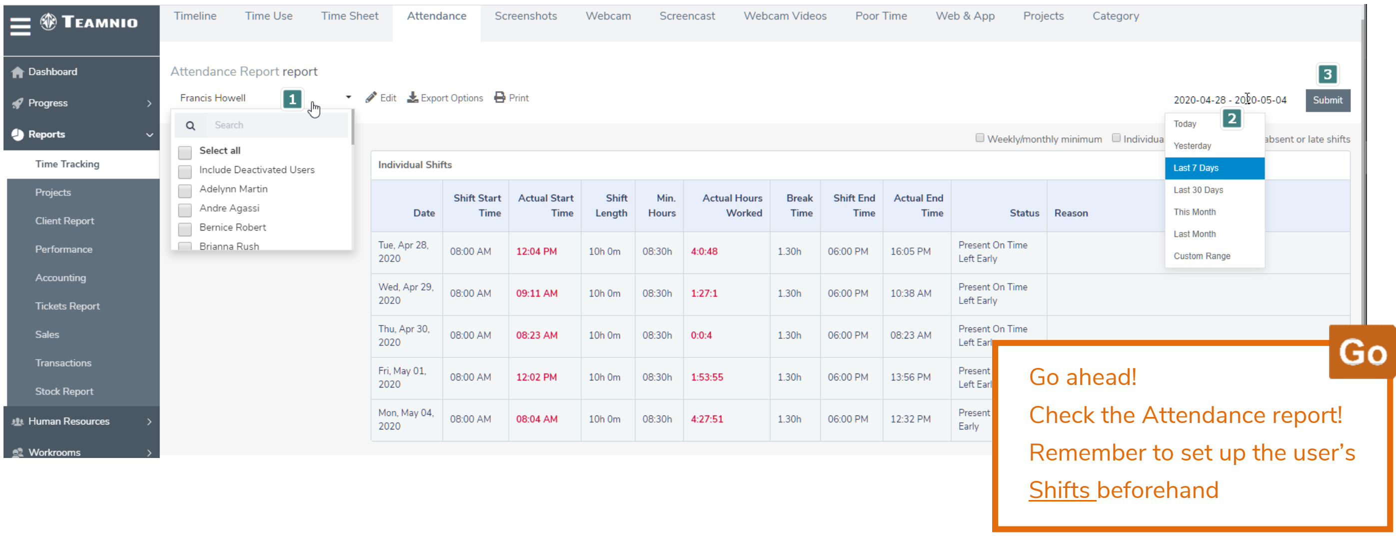
These are some examples of the information that each user will see as they track time for a specific shift on the desktop app.

T3.3. Attendance Report

After assigning the user's shifts (see [T3.1.](#)), we can check their tracked time against it, via the *Attendance* report.

1. Go to ***Reports > Time Tracking*** and select the ***Attendance*** tab
2. Select the **user**, the **date range** and click ***Submit***

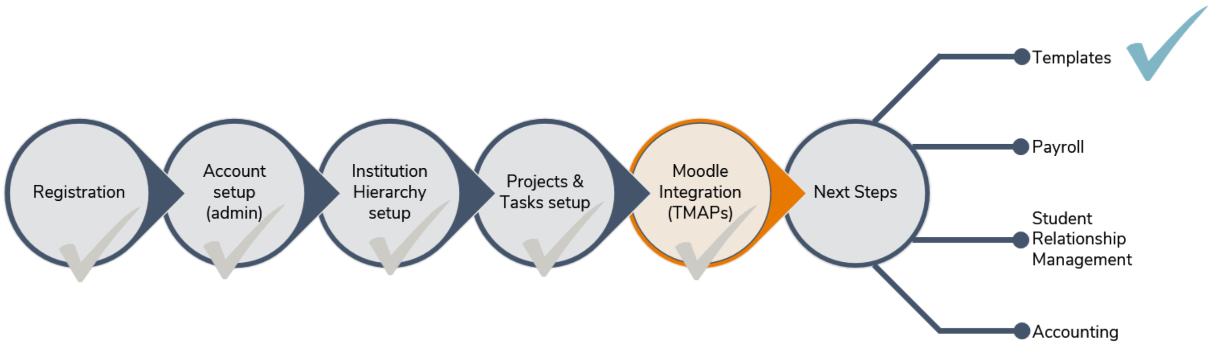
   The report will show, including the details of shift adherence.



T.4. Voila!

We've improved our time tracking efficiency through the templates for Time Tracking, Projects, and Attendance!

What do you want to explore next? [Payroll](#), [Student Relationship Management,](#) or [Accounting](#)?



Next Steps: Payroll

With Teamnio, we get **payroll automation** at the tips of our fingertips!
No more wondering about rules or exceptions when calculating salaries.
After a one-time setup per user, we get a 100% accurate calculation.
It's Hassle-free!

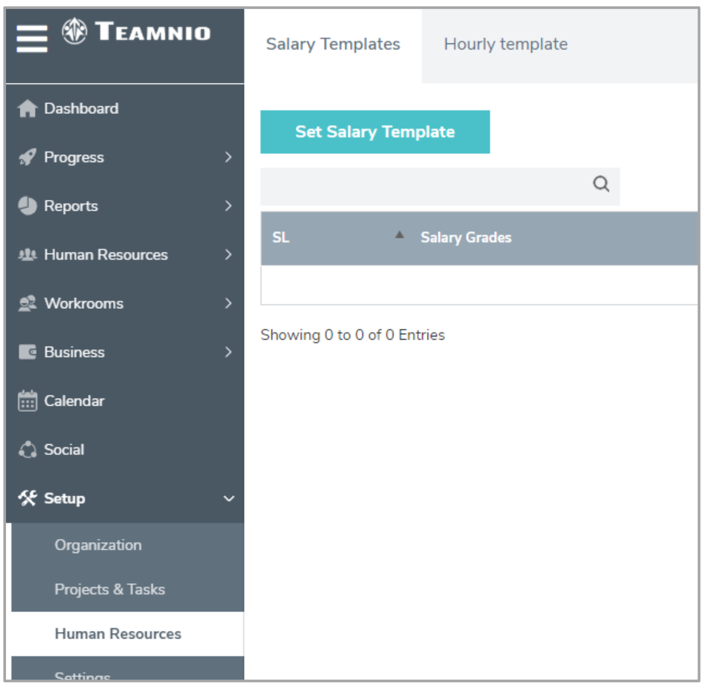
After that, the generated payment data can be exported for any third party payment provider, from independent transference systems like Paypal and Uphold, to any other financial institution.

Important!
For security reasons, **there are no financial transactions within Teamnio**, the Payroll modules focus record keeping. You are free to keep using any finacial services platform of your choosing.

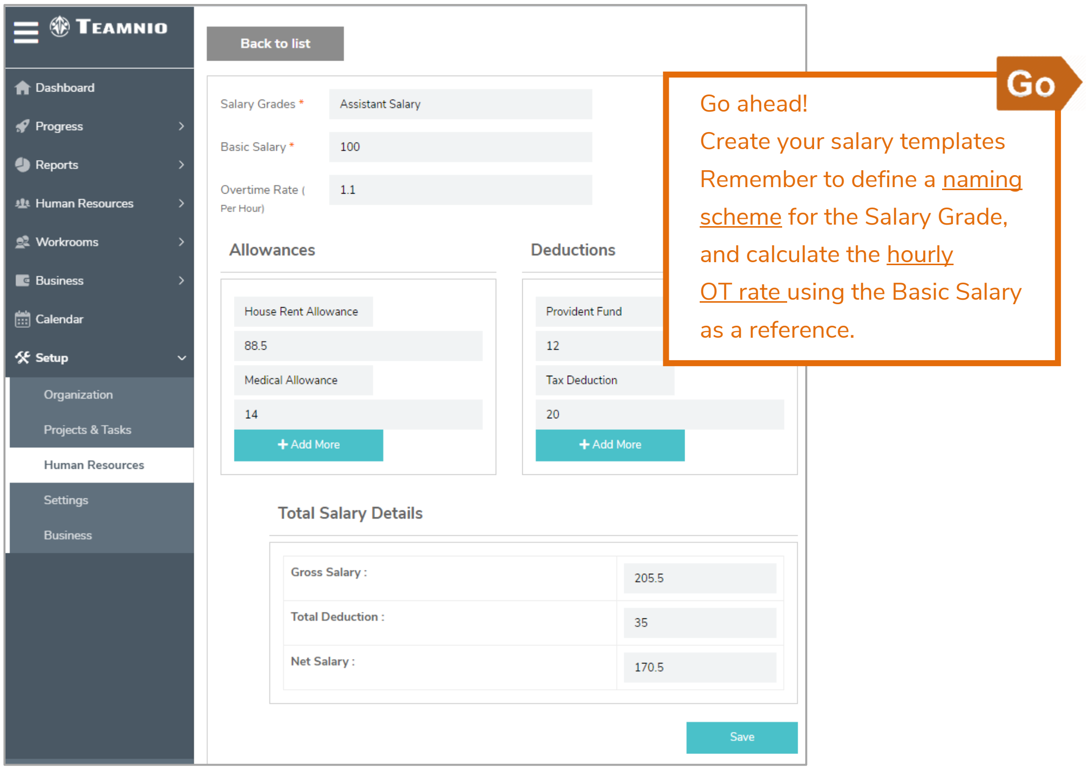
P1. Payroll Setup

Teamnio's Payroll module is based on salary and hourly templates.
Let's set them up!

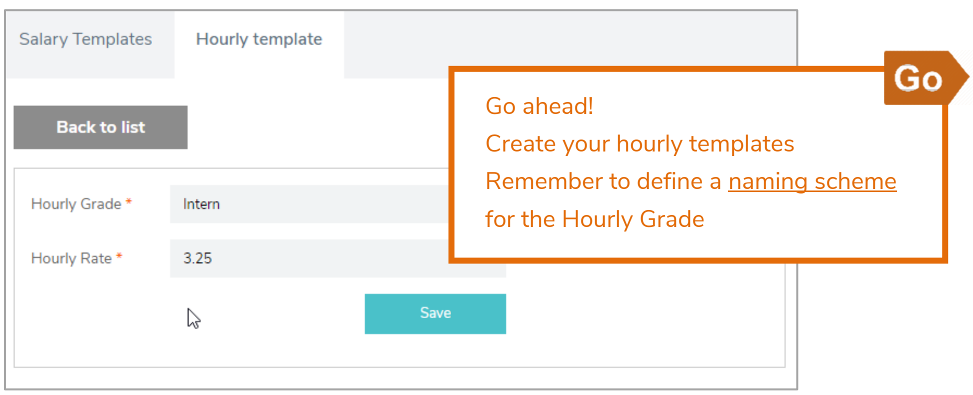
1. In ***Setup***, go to ***Human Resources***
   Right now, there are no templates.



2. **Click *Set Salary Template.*** *The image* below shows an example.
    a. First, set the ***Salary Grade*** name and its ***Basic Salary***
    It's highly recommended to define a naming scheme for the *Salary Grade* field
    b. Then, type the **Overtime Rate,** which is an hourly rate that might require some calculations using the Basic Salary as a starting point.
    c. Then, **type the amounts** for each allowance and deduction
    Alternatively, you can click the ***Add More button*** to create other Allowances or Deductions.
    d. As we do this, the calculations are shown in the ***Total Salary Details*** section



    e. Click **Save** to confirm
3. Now, let's go to ***Hourly Template.*** Here we can set up compensation standards for collaborators that work by the hour.
    a. Click ***Set Hourly Template.*** The image below shows an example.
    An Intern position earns $3.25 per hour.
    b. Let's name the ***Hourly Grade,*** set the ***Hourly Rate,*** and click **Save**



4. Once we´re done creating our templates, they will look like the images below.

Salary Templates

SL	Salary Grades	Basic Salary	Overtime (Per Hour)	Action
1	Assistant Salary	$ 100,00	$ 1,10	
2	Junior Staff Salary	$ 200,00	$ 2,10	
3	Senior Staff Salary	$ 300,00	$ 3,10	
4	Directors Salary	$ 350,00	$ 4,20	
5	Chief Officers Salary	$ 500,00	$ 5,30	

Hourly Templates

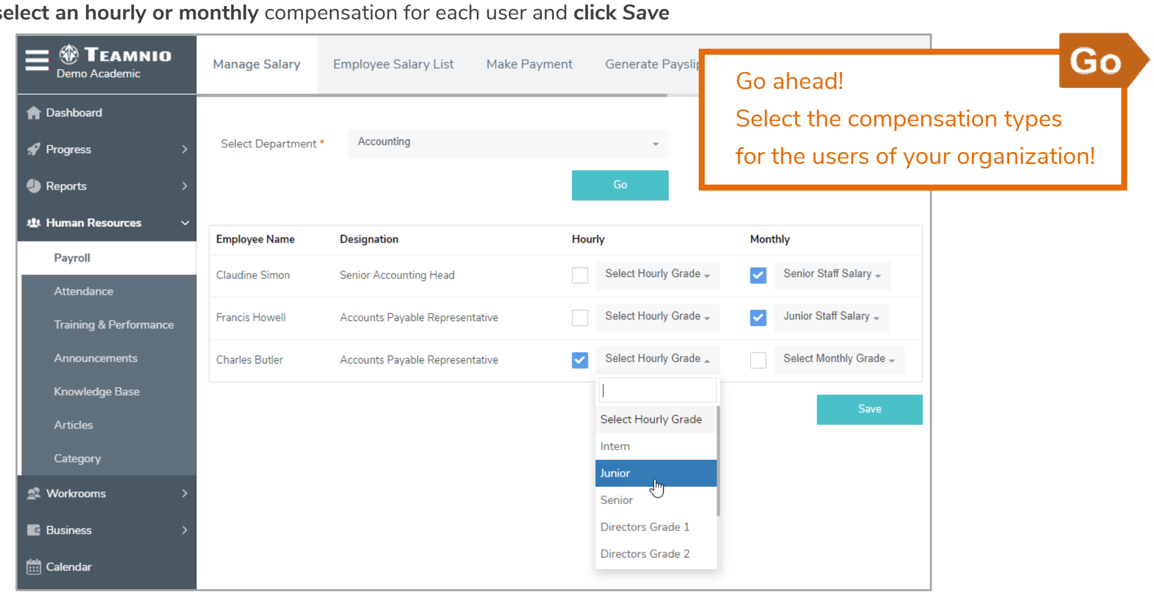
SL	Hourly Grade	Hourly Rate	Action
1	Intern	$ 3,25	
2	Junior	$ 2,00	
3	Senior	$ 3,00	
4	Directors Grade 1	$ 4,00	
5	Directors Grade 2	$ 4,50	
6	Chief Officer Grade 1	$ 5,00	
7	Chief Officer Grade 2	$ 5,50	
8	Board Members	$ 6,00	

5. Great! We're ready to see the automated Payroll in action!!

P2. Salary management

Let's add the users to a salary grade so their compensation is calculated accurately. We´ll experiment with an example.

1. Go to ***Human Resources > Payroll***
2. In the **Manage Salary** tab, select the **Department** and ***click Go***
   These are the users assigned to the positions within the selected department
3. Let's **select an hourly or monthly** compensation for each user and **click Save**

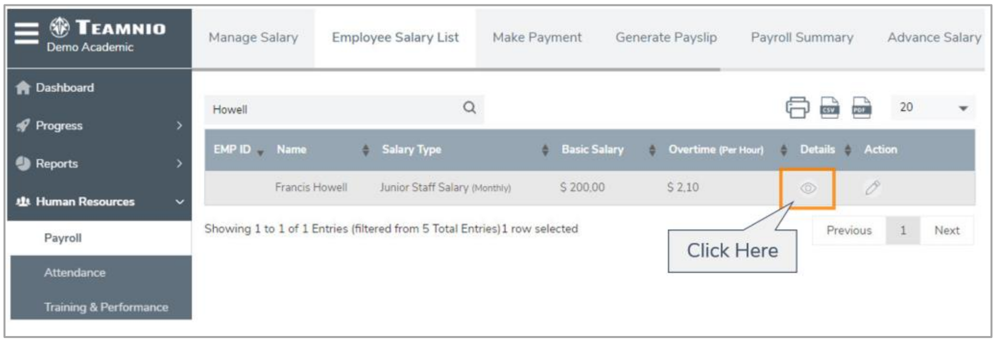


4. By repeating these steps, we can set the Salaries for the whole organization.

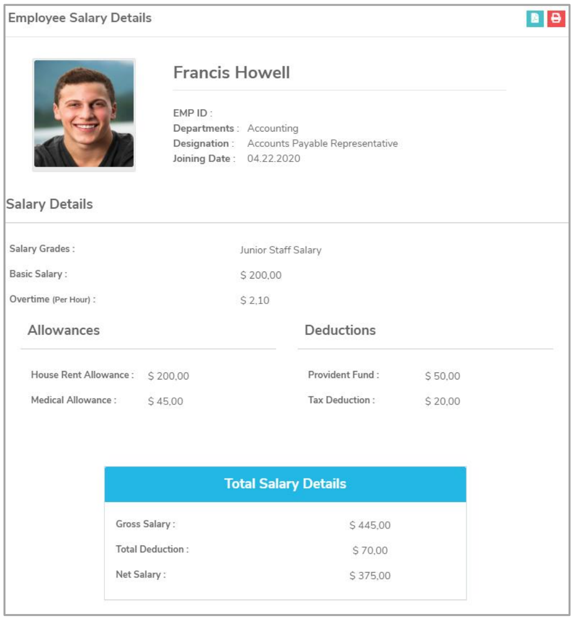
P3. Payroll - User search

After creating users, it's important to be able to find them easily. If we need to find the details for a specific user but don´t know their department, we can use the *Employee Salary List*.

1. Go to ***Human Resources > Payroll***
2. Click the tab ***Employee Salary List*** and **type the person's name** on the search field.
   Here, we can either edit or see the user's details.
   - If we click Edit ( ), Teamnio will show the *Manage Salary* tab and automatically select the user's team
   - Instead, let's **click *View.***



3. This is the ***Employee Salary Details*** screen
   We can use the buttons on the top right corner to print or export this information
   To exit, **click Close**



P4. Automated salary calculation

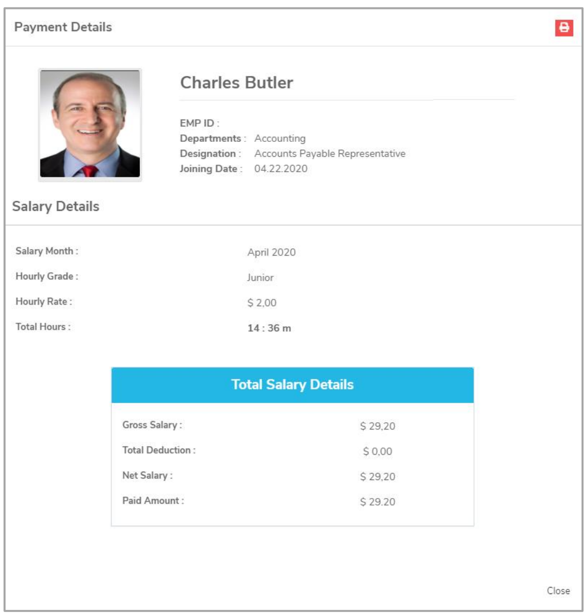
All that is left is to generate the payments and their corresponding slips.

1. Go to ***Human Resources > Payroll***
2. In the **Make Payment** tab, **select the department and the Month,** and **click Go**
3. This is the payment table.
   The Net Salary column shows the amounts due for payment, and the Make Payment button generates a record of the payment.

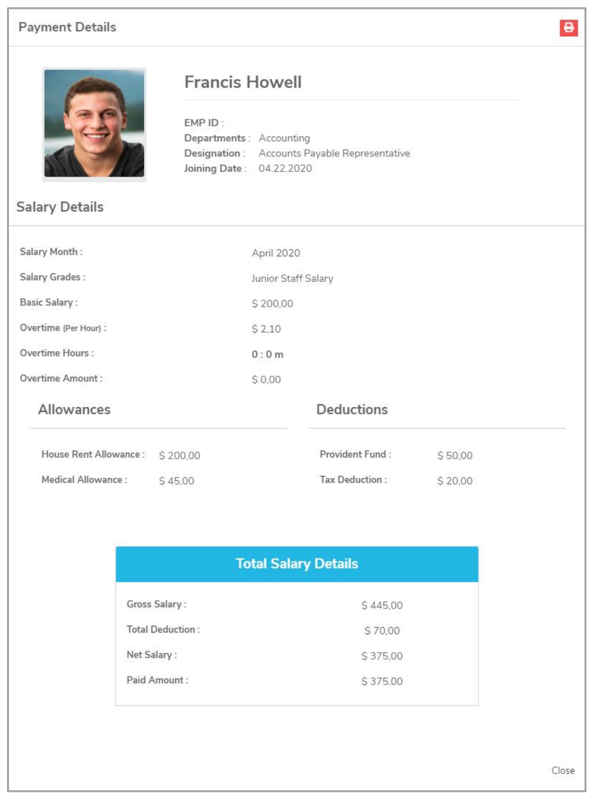
EMP ID	Name	Salary Type	Basic Salary	Net Salary	Details	Status	Action
	Claudine Simon	Senior Staff Salary (Monthly)	300	540		Unpaid	Make Payment
	Charles Butler	Junior (Hourly)	2 (Per Hour)	29.2		Unpaid	Make Payment
	Francis Howell	Junior Staff Salary (Monthly)	200	375		Unpaid	Make Payment

4. Next, we should **click on the *Details*** column of every user to verify their payment details.
   The examples below show one example of each compensation type: hourly and salary

Hourly Compensation



Salary Compensation

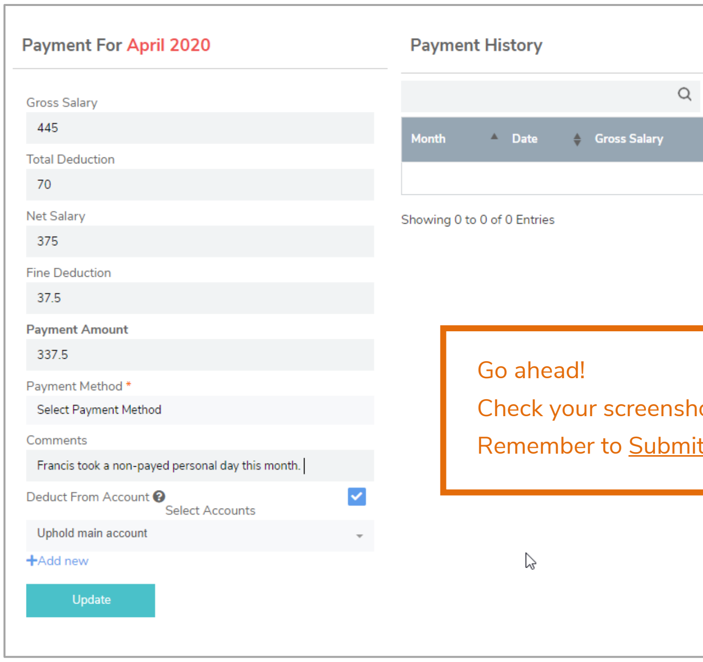


5. After verifying, close the details dialogue and **click Make Payment** on the desired user

Details	Status	Action
	Unpaid	Make Payment

This is the payment confirmation screen, where we can see the payment history before verifying the current payment information.

6. To **Verify the payment information:**
    a. **Check** to see if the **gross salary** is correct
    b. In the **Fine Deduction** field, **type** the amount of any required **deductions**
    c. Select the ***Payment Method***
    d. **Type your comments**
    e. And finally, click ***Update***



Go

Go ahead!
Check your screenshots now!
Remember to <u>Submit</u> the date.

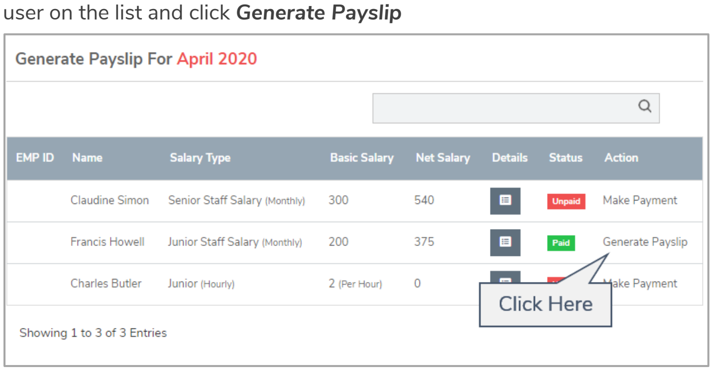
    f. As a result, the payment is registered on file and Teamnio's Accounting module updates its records to reflect the movement of funds. There is no actual money being handled here. Teamnio just keeps a record for accounting purposes.

7. Now, we must perform the payment through the financial platform we normally use for payroll deposits.

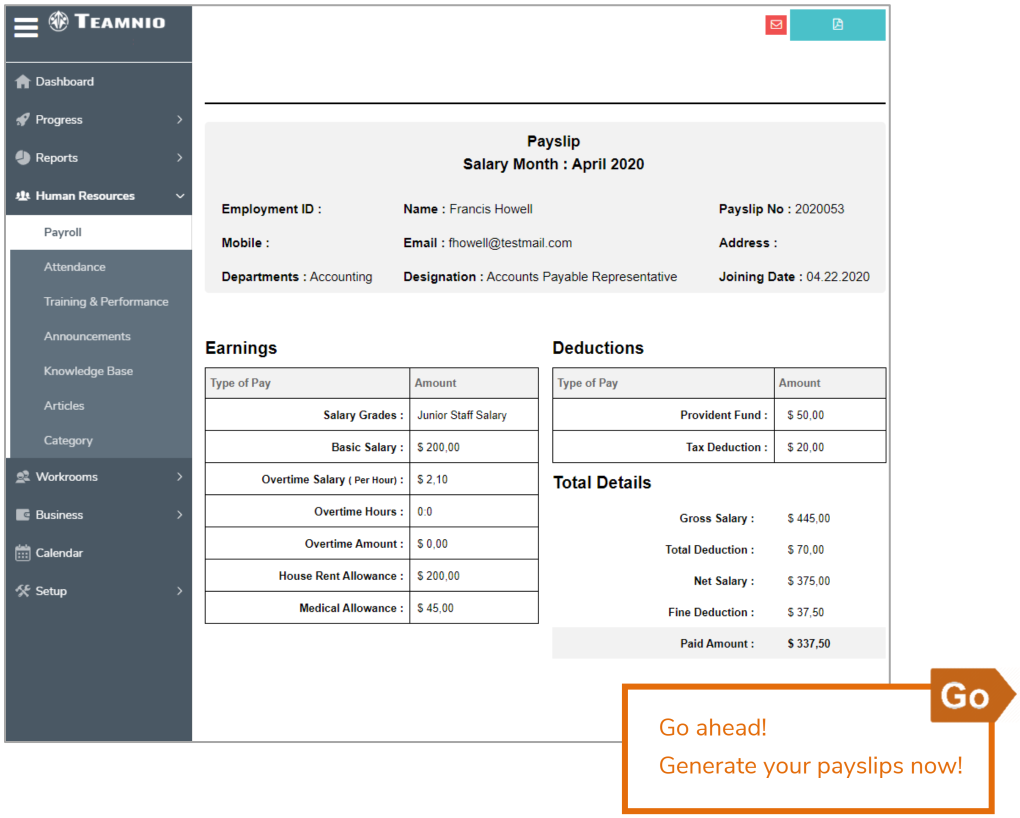
Go

Go ahead!
Proceed with the deposit!
Remember, for security purposes,
this is done <u>outside of Teamnio</u>

8. Finally, we need to generate the **Payslip.** This is also done within the Payroll module
    a. Go to the **Generate Payslip** tab, select the ***Department*** and **Month,** and **click Go**
    b. Find the user on the list and click ***Generate Payslip***

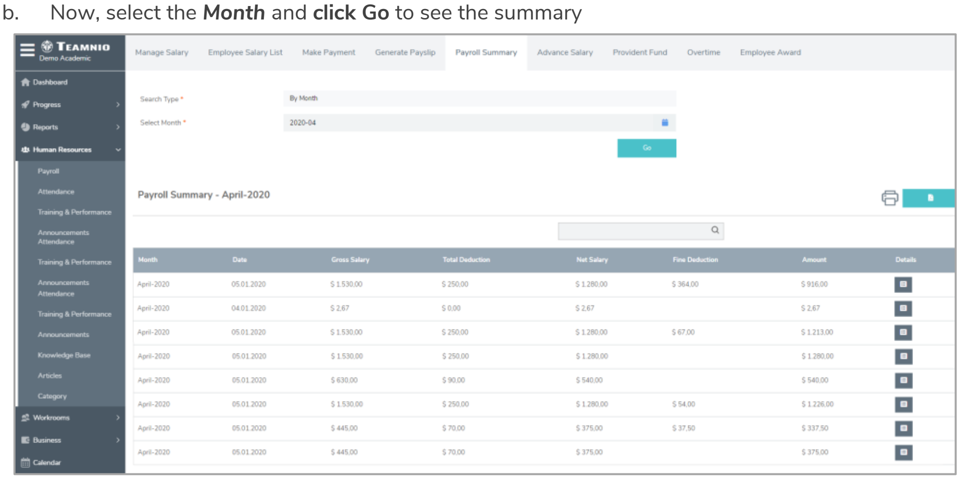


c. The payslip is generated on a new tab.
Use the buttons on the **top right corner to email or export** the payslip



After repeating these steps for every user, we should gather a report.

9. Let's do that, by going to the **Payroll Summary** tab
   a. Select the ***Search Type.*** We have four options: By employee, by month, by period, or All activities. The latter is useful to analyze all the payroll-related performed historically by different users.
   b. Now, select the **Month** and **click Go** to see the summary

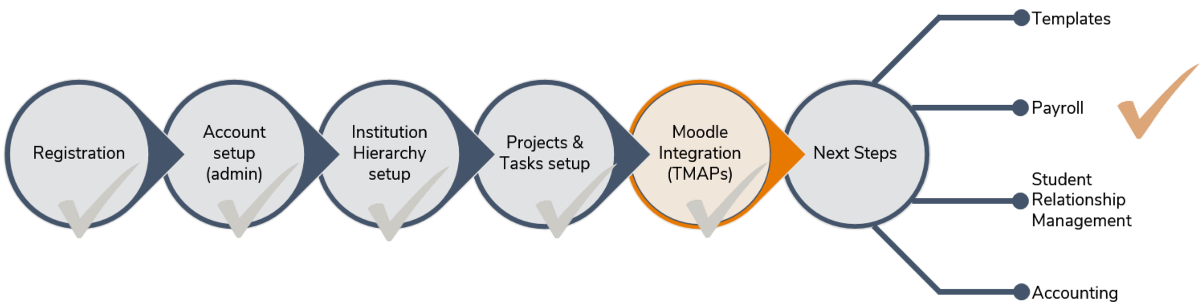


That's it!
We´ve quickly calculated and registered the month's salaries thanks to the power of Teamnio's automated payroll functionality! But this is just the tip of the iceberg! There are more Payroll functions still to explore, related to adjustments, exceptions, and benefits. Refer to Teamnio's User Manual, where they are covered in detail.

P5. How about that!

We've automated our payroll system!

What do you want to explore next? [Templates](), [Student Relationship Management,]() or [Accounting]()?



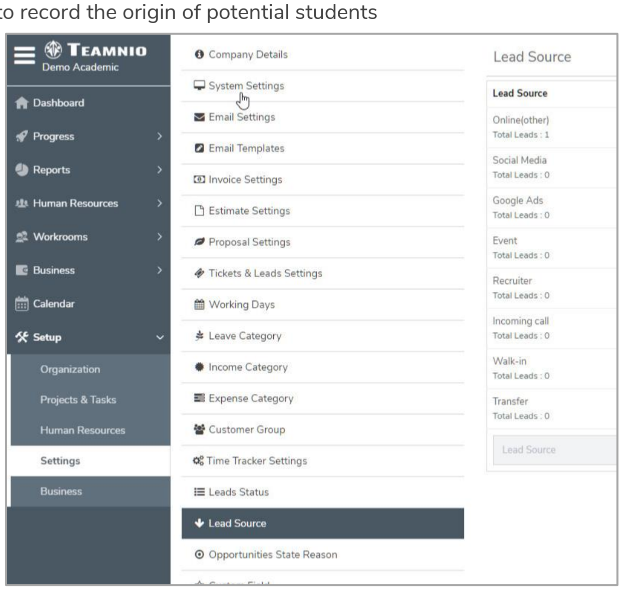
Next Steps: Student Relationship Management

Teamnio Academic includes all the functionality of CRM software (Customer Relationship Management), which is very useful to track and build meaningful relationships between the students and the institution's staff.
Let's see it in action!

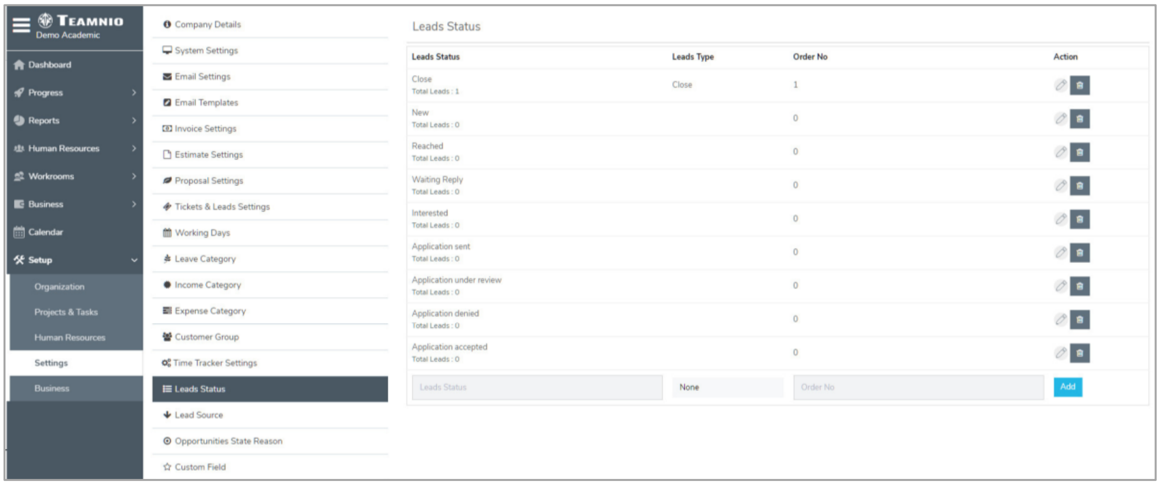
S1. Set up the pipeline

Teamnio offers a fully customizable environment to engage and follow up on both potential and registered students. Before entering any data, it's important to find how Teamnio fits our institution's engagement model. Let's see how to set up the New Admissions pipeline for a college offering 4-year degree programs.

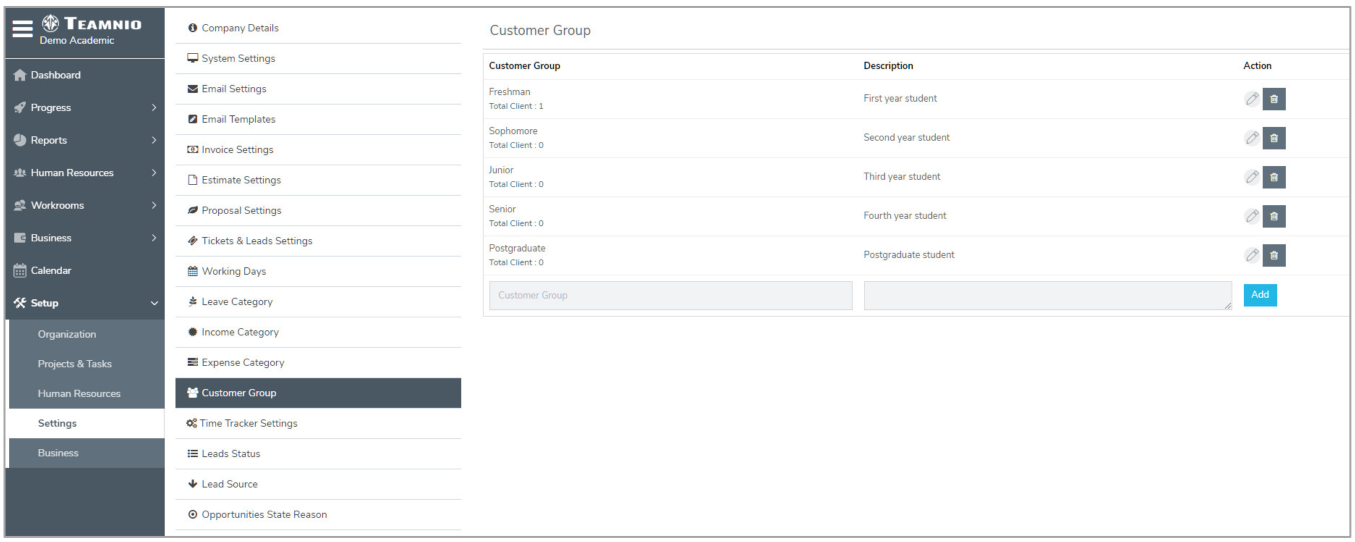
1. Go to ***Setup > Settings,*** select the ***Lead Source*** category and use the ***Add button*** to create all the needed sources
   This will allow us to record the origin of potential students



2. Next, we should define the status changes to move prospects down the pipeline
   To do that, go to ***Setup*** > ***Settings*** and access ***Leads Status***
   Use the ***Add button*** to create all the status items you need



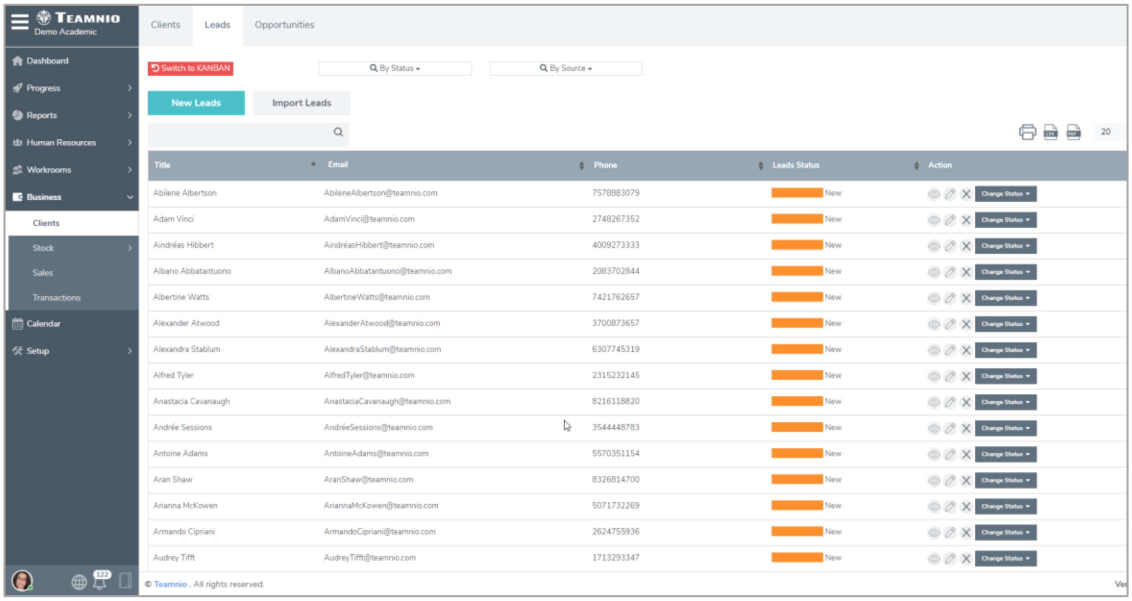
3. Finally, go to ***Setup*** > ***Settings*** and click ***Customer Group***
   We want to divide the student body depending on their seniority.
   Click ***Add*** to create the groups you need.



We´re ready to start engaging our leads!

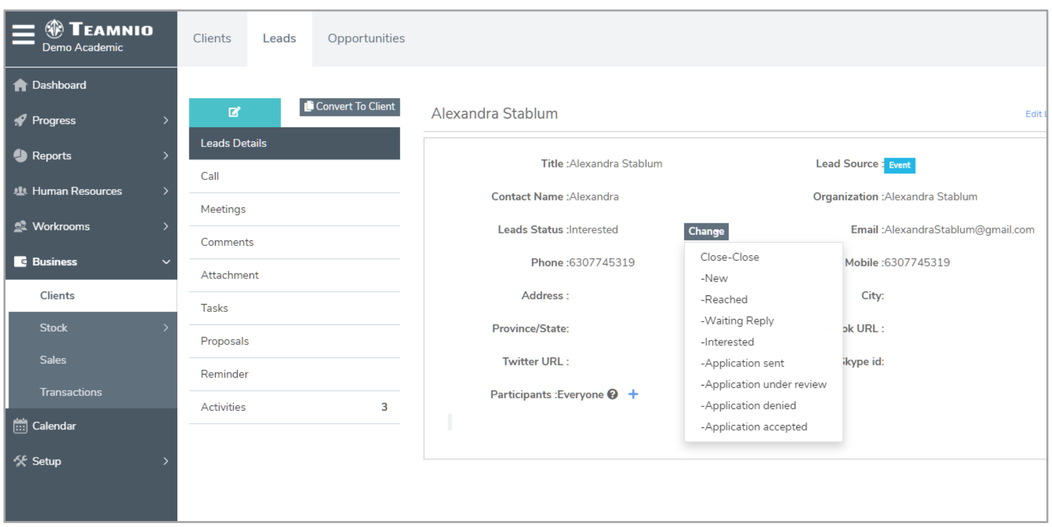
S2. Leads Module

1. Let’s go to ***Business > Clients*** and click the **Leads tab**
2. This is the list of potential students that have entered our pipeline.
   Here, we can create new leads individually through the ***New Lead*** button, or import badges via the ***Import Leads*** button
   The list shows the lead’s contact information and status. For instance, the status of all these leads is New. They were probably imported from a list.



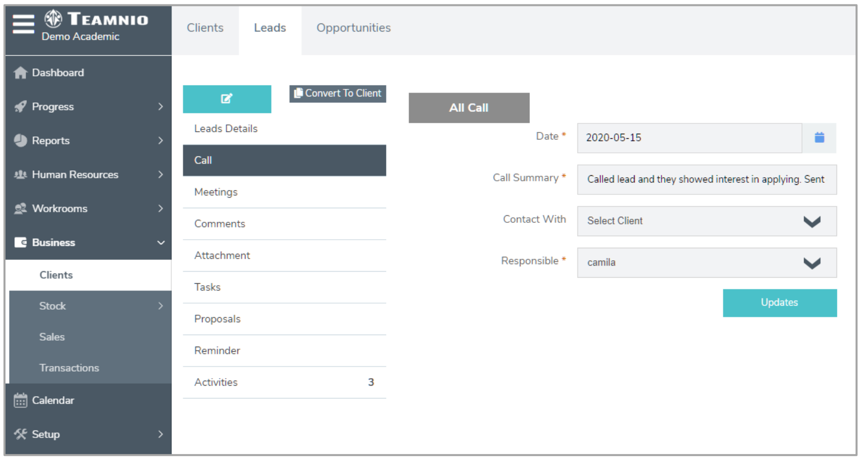
Let’s contact one of these guys and help them become a student.

3. **Click on any name** to access their contact history. For instance, Alexandra Stablum
   a. The ***Leads Details*** section shows Alexandra’s general information.
      Let’s suppose Camila called Alexandra, who expressed interest in filing the application
   b. To record this progress, Camila would click the **Change button** and select the **Interested** status.
      Remember, we created these custom statuses in the Setup > Settings module

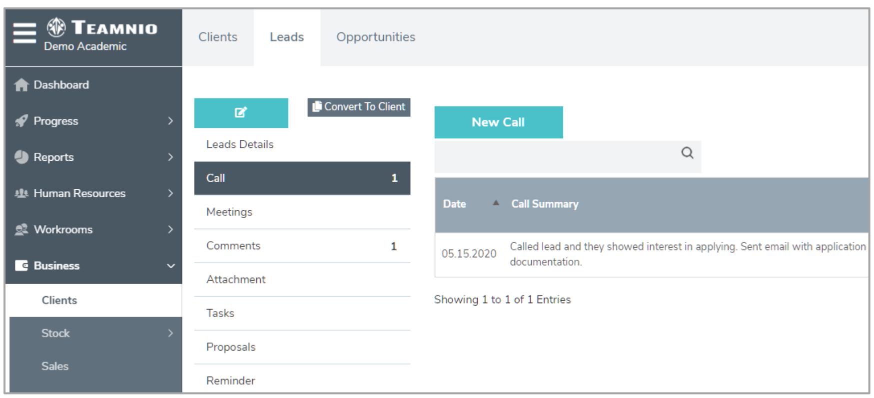


c. Now, Camila would go to ***Calls*** and click ***New Call***
She should fill this form to record the outgoing contact and hit **Update** to confirm

d. To finish logging these events, Dennis might go to **Comments** and add a simple note to describe the interaction

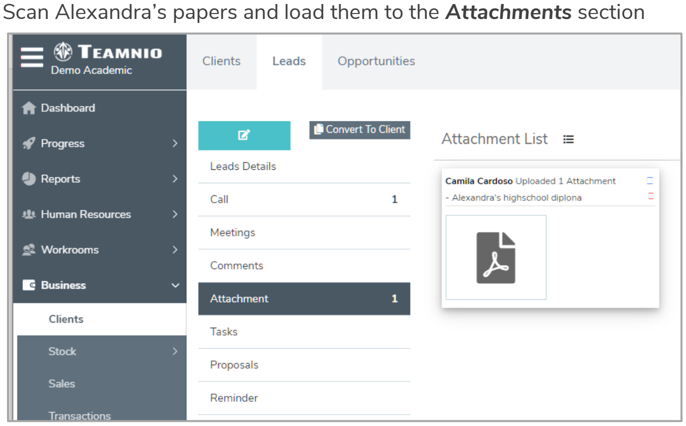


e. Now, suppose that a few days later, Alexandra came in to bring her application personally, along with other documents
During this visit, Dennis from Admissions helped her.
To process this, he should go to ***Business > Clients***, click on the **Leads tab** to search for Alexandra and click on her name
Right away, he would notice that there is one call and one comment logged for this lead
He could click on either of these two categories to see what went on

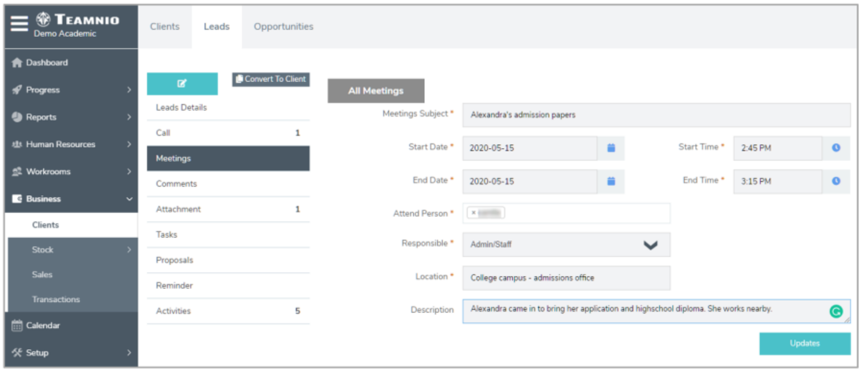


f. After reading the documentation, Dennis could:

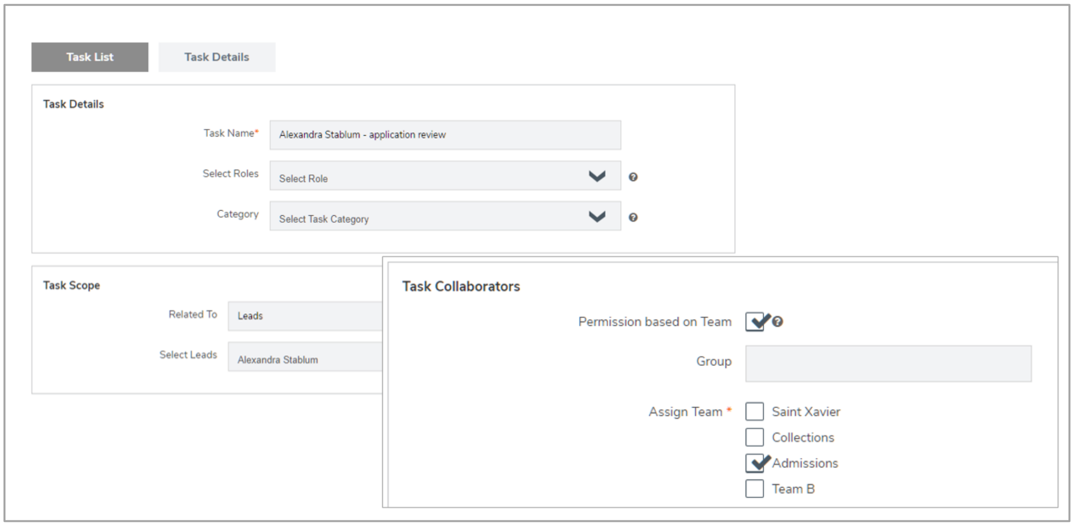
i. Scan Alexandra's papers and load them to the ***Attachments*** section



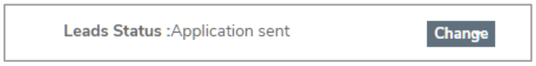
ii. Go to ***Meetings*** and ***click New*** to log the interaction



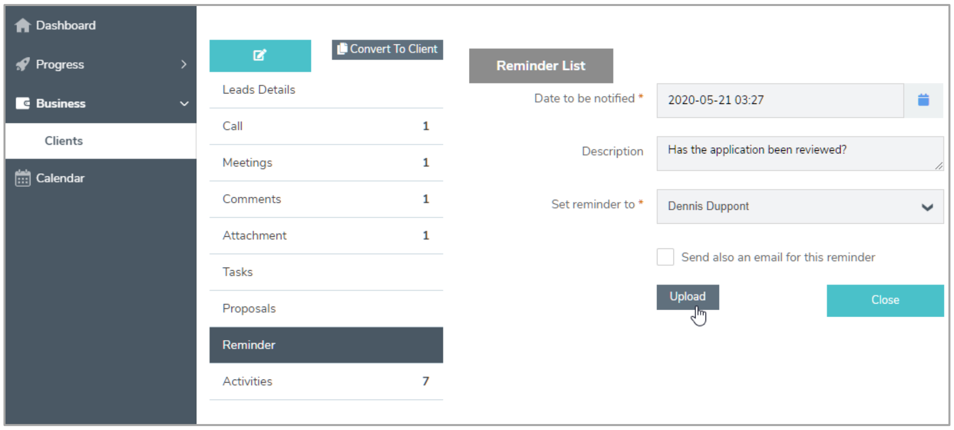
iii. Go to the **Tasks** category on the left and create a new task for the Admissions Team to process Alexandra's application.
The image below shows an example. Notice that the **Task Scope** section relates this task to the Lead called Alexandra Stablum and that it was assigned to the Admissions Team.
By clicking **Save** to continue, Dennis would be almost done with his part of the work.



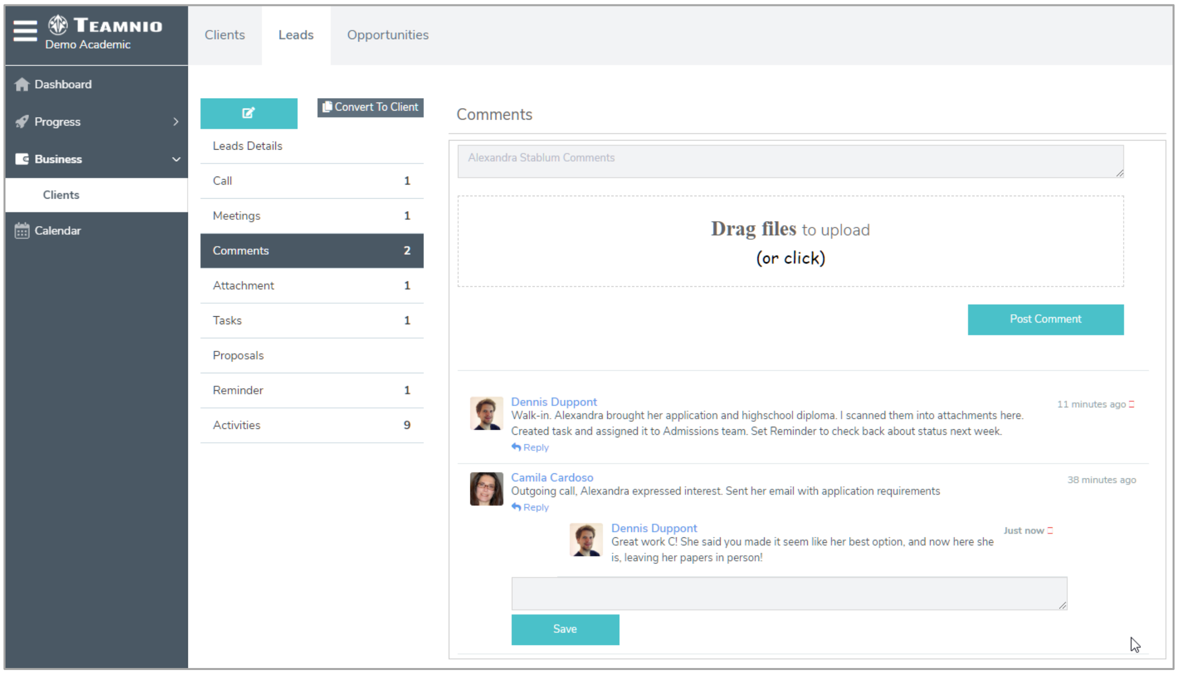
iv. To finish, Dennis needs to **update the Lead Status** to Application Sent



v. Dennis also could set a reminder for himself, to check back on the status of the application
To do that, he'd have to ***go to Reminders,*** create a new item, fill the form, and **click Update**.



vi. Now he just needs to add an item in the **Comments** section of Alexandra´s lead record to specify his actions.
Notice that comments can be replied, which makes it easy to ask questions or provide feedback.

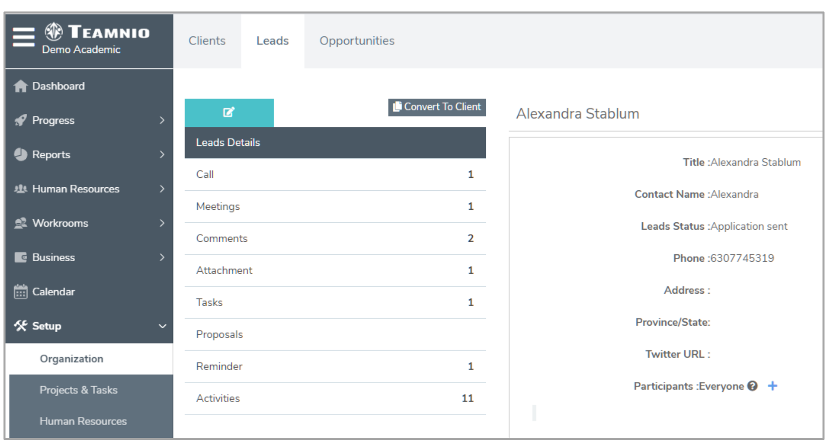


4. This way, the whole team has visibility over all lead interactions and prospecting work can be performed effectively

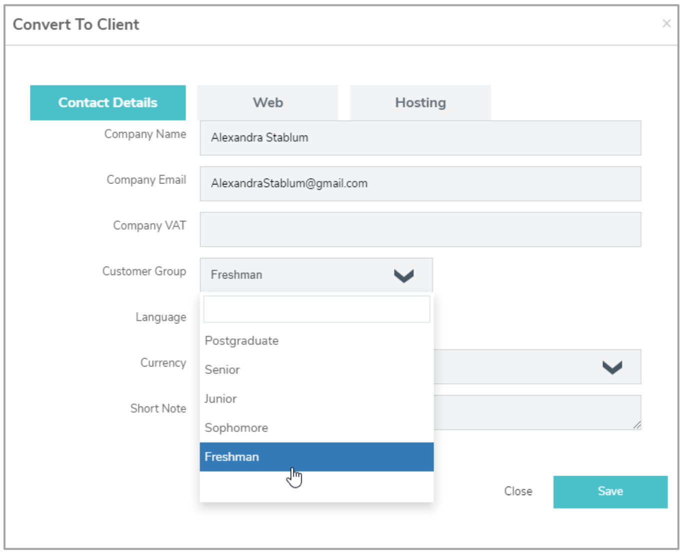
S3. Client's Module

Let's continue going down the pipeline!
Alexandra's application has been approved, so we´re going to start her process as a student

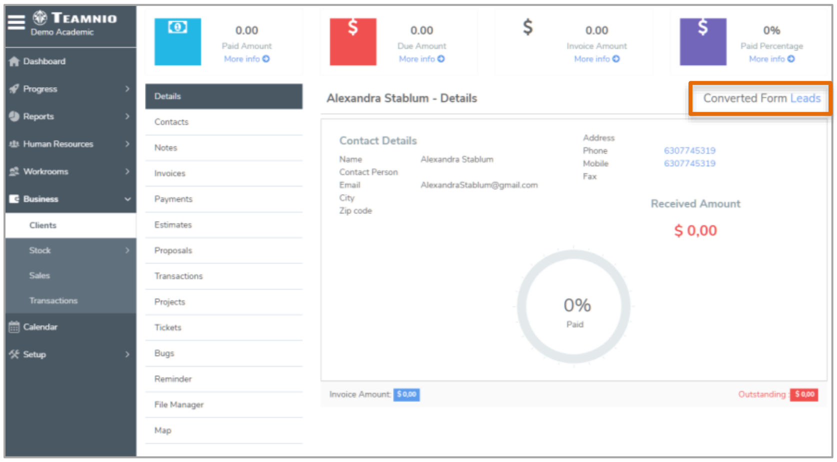
1. Go to ***Business > Clients*** and access the **Leads tab**
2. Find the lead's name and click on it
3. Click ***Convert to Client***



4. Teamnio will pop-up a message to confirm the Lead's information.
   Make any desired changes, for instance, selecting the Customer Group.
   To confirm, ***click Save***



5. Now the lead is part of the student's body and we can access their records from within the **Clients tab**
   To see the data generated from back when this record was a Lead, click on the ***Converted from Leads* button,** located on the top right corner of the client record.

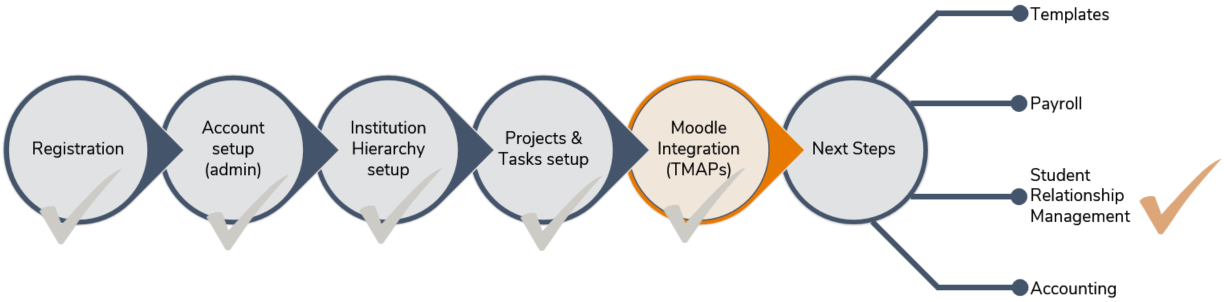


6. The category panel on the left of this screen makes it possible to record all the interactions with the student, from tuition collection to tickets and all other non-academic service requests.
   Every time the student contacts the institution, the interaction can be recorded here.
   But this is just the tip of the iceberg. We could take advantage of the modular interaction between Teamnio's modules to optimize the student engagement experience. Refer to Teamnio's user manual for further examples to fully explore the possibilities.

S4. Behold!

We've set the stage to establish and maintain the best possible relationship with our students. They will feel we're with them every step of the way!

What shall we explore next? Templates, Payroll, or Accounting?



Next Steps: Accounting

The accounting features create a set of automatic reports to help simplify financial decisions within the institution. Let's look at two simple scenarios related to expenses and income. We learned how to perform payments in the Payroll section, so let's focus on one form of income: the tuition fees.

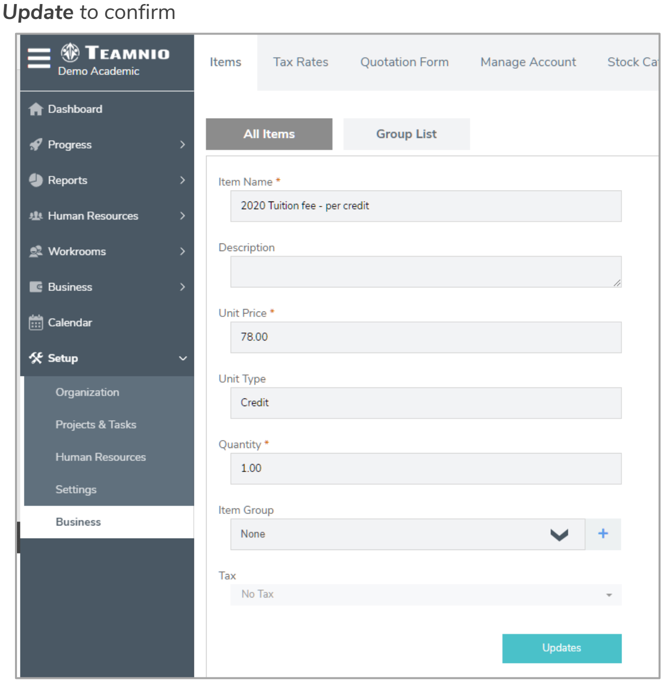
A1. Income set up

Let's perform the most basic setup to charge student fees.

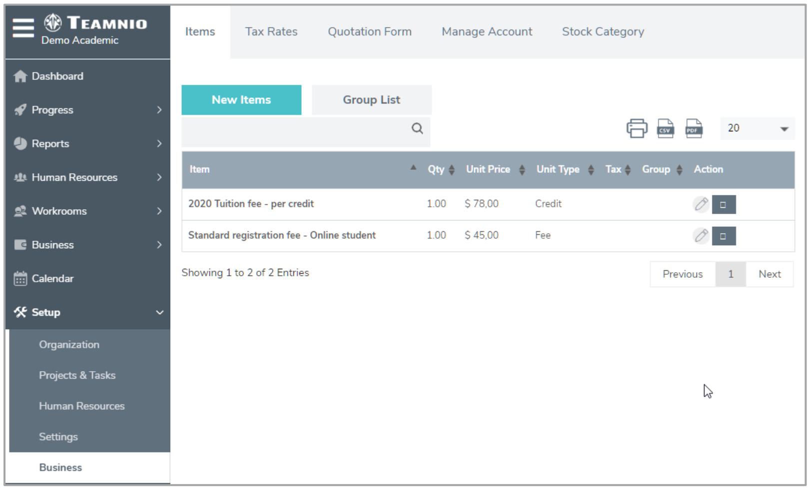
1. Go to ***Setup > Business*** and click the ***Items tab***
2. Click ***Create New Items*** to add a standard item to the invoicing system

   We'll set up a simplified item to charge on a credit basis

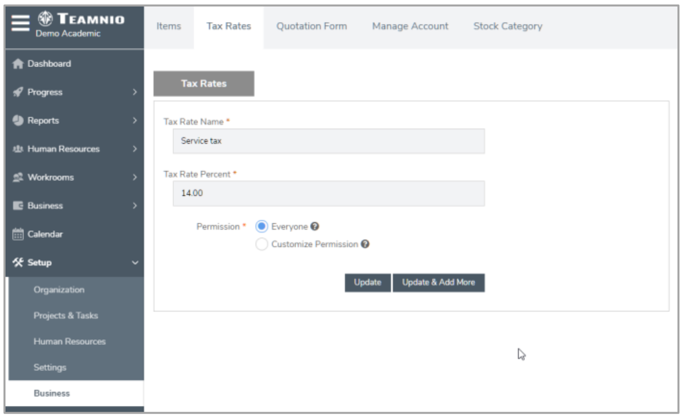
   a. Let's name this item ***2020 – Tuition fee – per credit***
   b. In the ***Unit Price*** field, type the amount for a single credit, and type ***Credit*** in the ***Unit Type*** field
   c. In ***Quantity*** type the number 1
   d. We could add a specific tax to the item, but for now, we'll leave it as is.
   e. ***Click Update*** to confirm



f. We can repeat the previous actions to create as many items as we want, from the simple standard charge per credit we just created, to a separate fee for every course the institution offers



3. Now, let's click the **Tax tab**
   a. Here we can set up any kind of tax rate. **Click New Tax Rate**
   b. Let's set up a local **service tax of 14%** and **click Update**



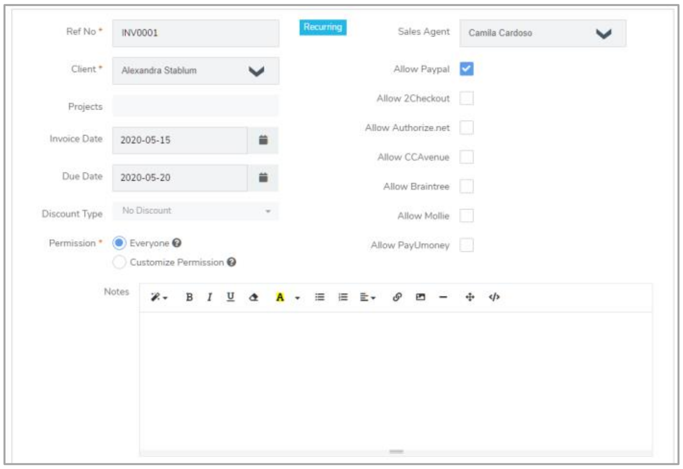
4. That's it! We're ready to generate invoices

A2. Invoicing

In Teamnio we can set up all sorts of structures for sales. Let's charge a student for their tuition fees.

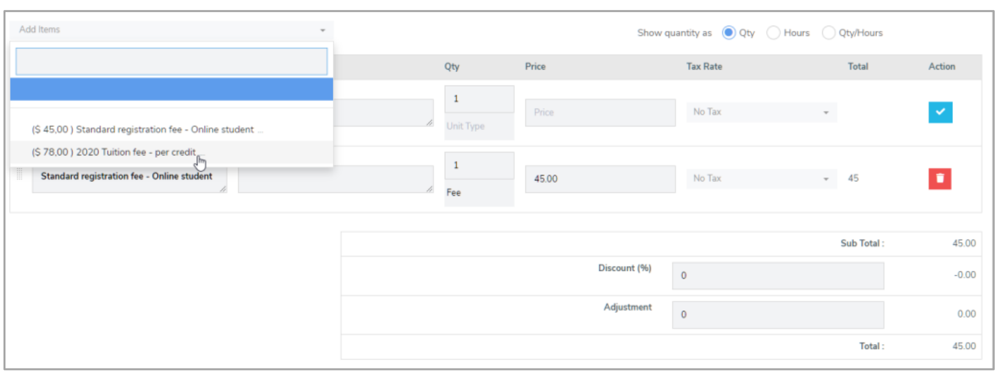
1. Go to ***Business > Sales*** and click on the ***Invoices tab***
2. This is the invoices screen. Click ***Create Invoice***

3. Let's fill out the form
    a. The reference number and invoice dates generate automatically
    b. Click the ***Client* field,** and search for the student's name
    c. The ***Sales Agent* field** is populated with the Teamnio username of the person creating the invoice
    d. From the checkboxes below, select ***Allow Paypal***
    e. We can add permissions and notes if required



Now comes the most important part: the student's charges.

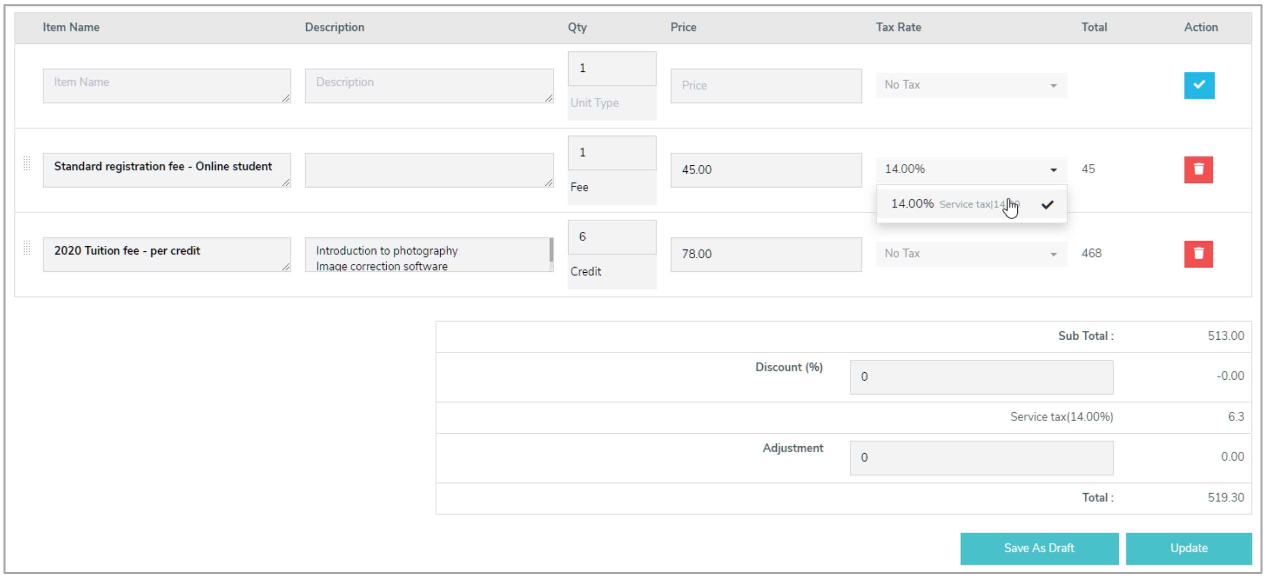
    f. **From the *Add Item* dropdown menu, select the appropriate items**
    For this example, we´ll add the two we just created:
        i. **Select** the Standard Registration Fee from the dropdown,
        ii. **Set the *Quantity*** field to 1,
        iii. Check the ***Price*** is correct, and
        iv. **Click the check button on the *Action* column**
        As a result, the item will be listed to the invoice
        v. Now, **add the item** called ***Tuition Fee – Per credit***



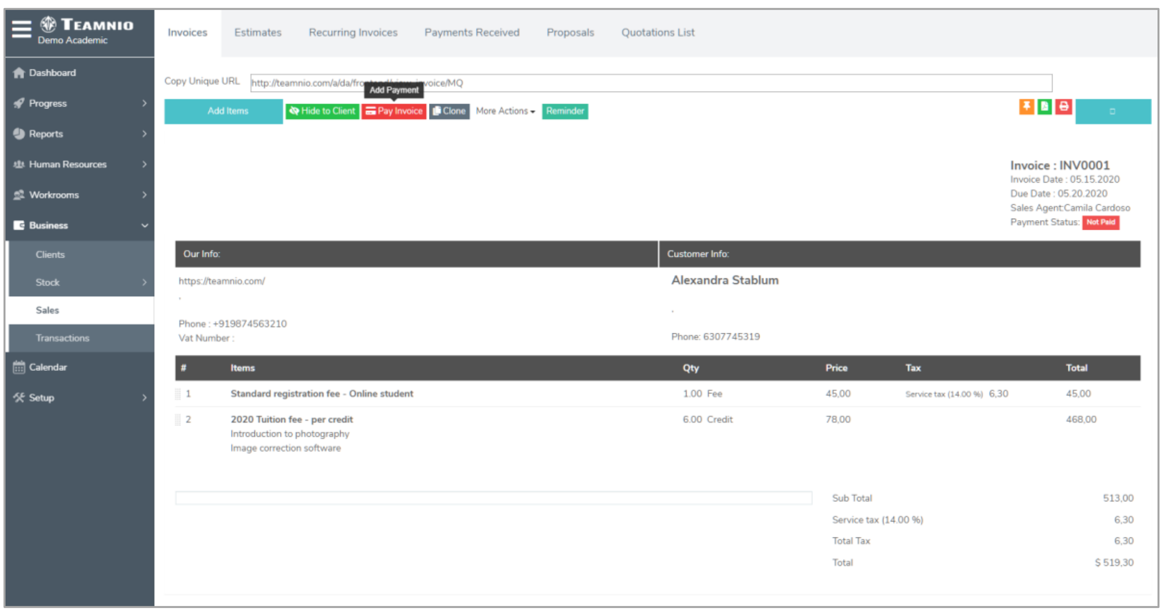
        vi. In the ***Description* field**, <u>list the courses the student is going to take</u>, and enter the number of credits for those in the ***Quantity* field**
        For this example, we´ll add 6 credits
        vii. To confirm, **click the check button**
        viii. Now, let's add taxes. Select the service tax from one of the items. It's possible to apply taxes separately for each item on the invoice.

ix. The total will be calculated and shown at the bottom, where we can also add discounts or adjustments

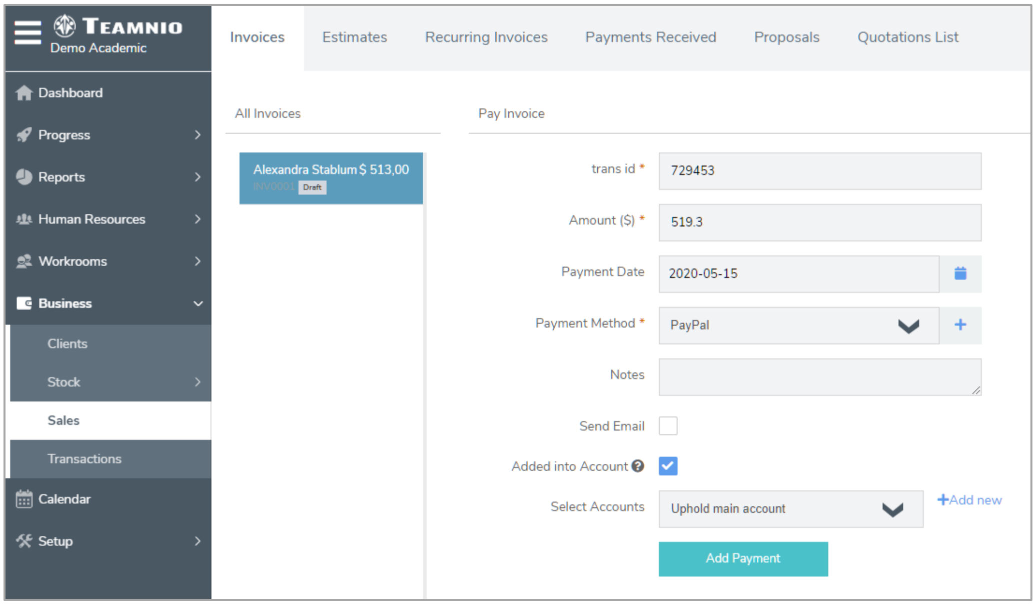
x. **Click Update** to confirm and proceed to create the invoice.



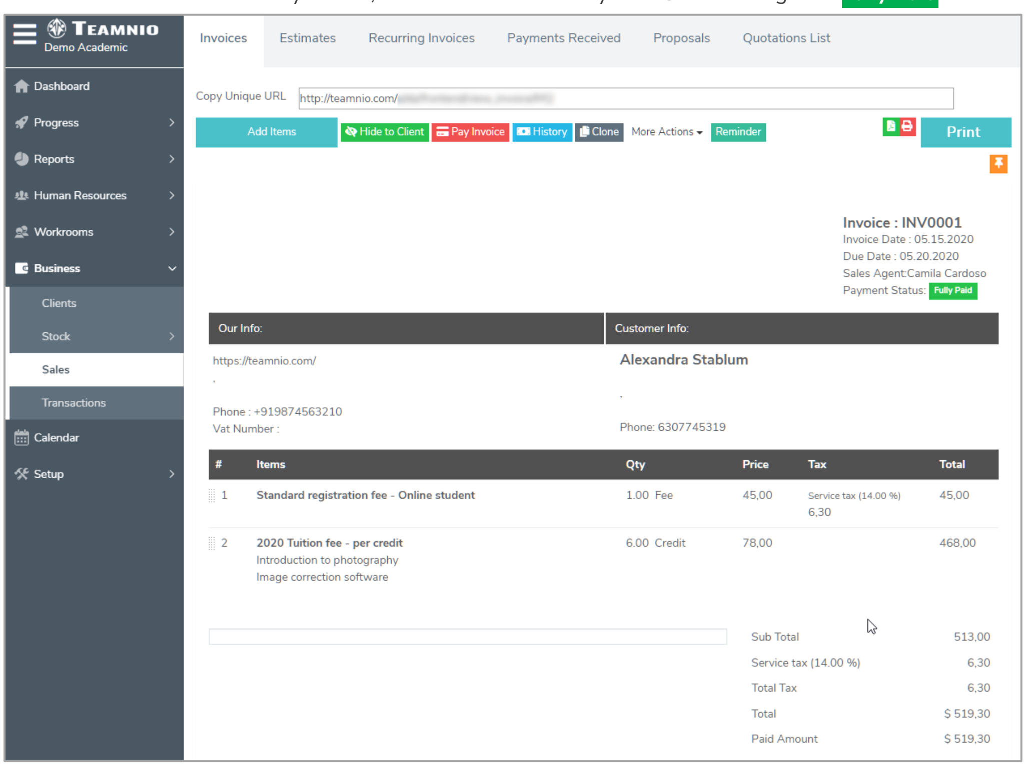
4. This is the invoice summary screen. Notice the Not Paid tag on the right side of the screen.
To proceed with the payment, ***click Pay Invoice***



5. This is the payment screen. It´s time to collect a payment from the student, using their preferred method of payment. Remember, Teamnio does not perform any financial transactions.
   We are registering the payment to the accounting system.
   a. This screen shows a confirmation of the payable ***Amount*** and the ***Date***
   b. Select a ***Payment Method***, and add any pertinent notes
      The following steps are vital for the Accounting Reports inside Teamnio.
   c. Enable ***Added into Account,*** and **select the account from the dropdown.**
      If we haven't created one so far, we can do so by clicking the Add New button
   d. To finalize the registration of this payment, **click *Add Payment***



6. Back at the invoice summary screen, we can see that the Payment Status changed to Fully Paid



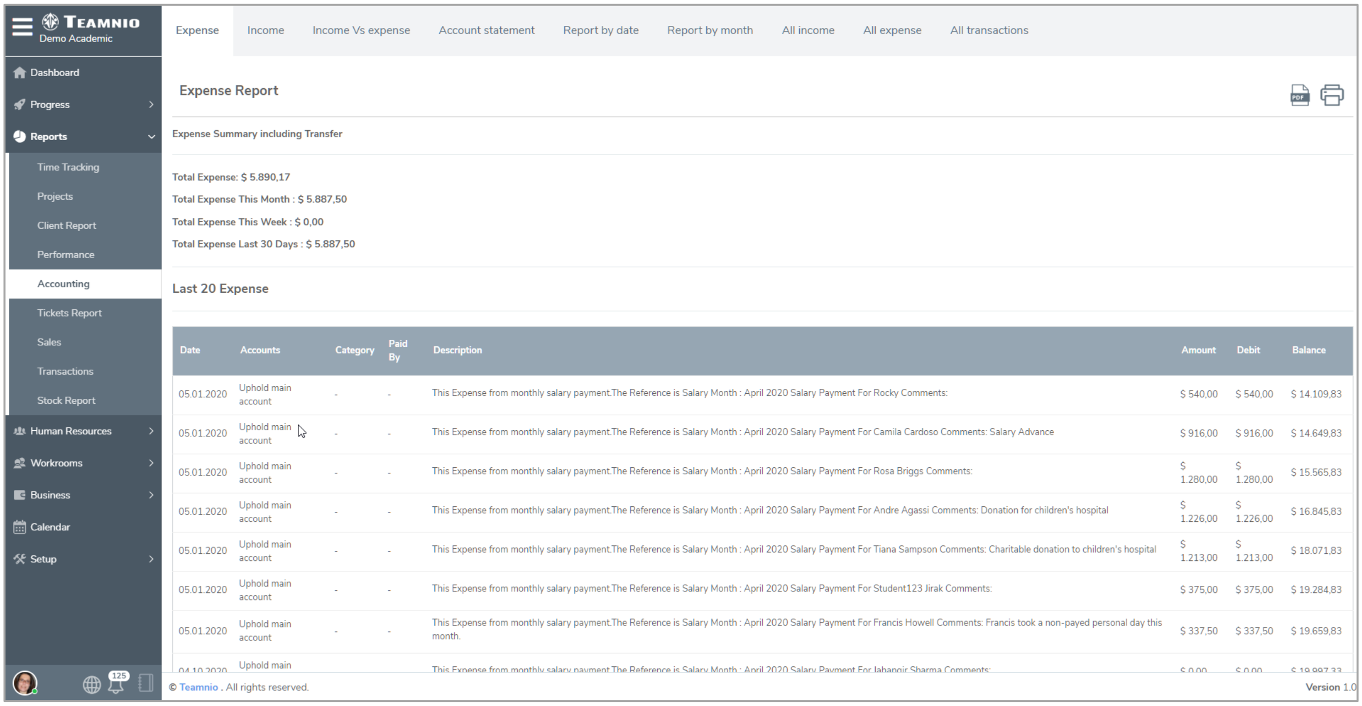
7. That's the way to create and execute invoice payments!

A3. Accounting reports

The accounting reports provide a wide array of analysis possibilities.
Let's look at the two main reports, found in ***Reports > Accounting***

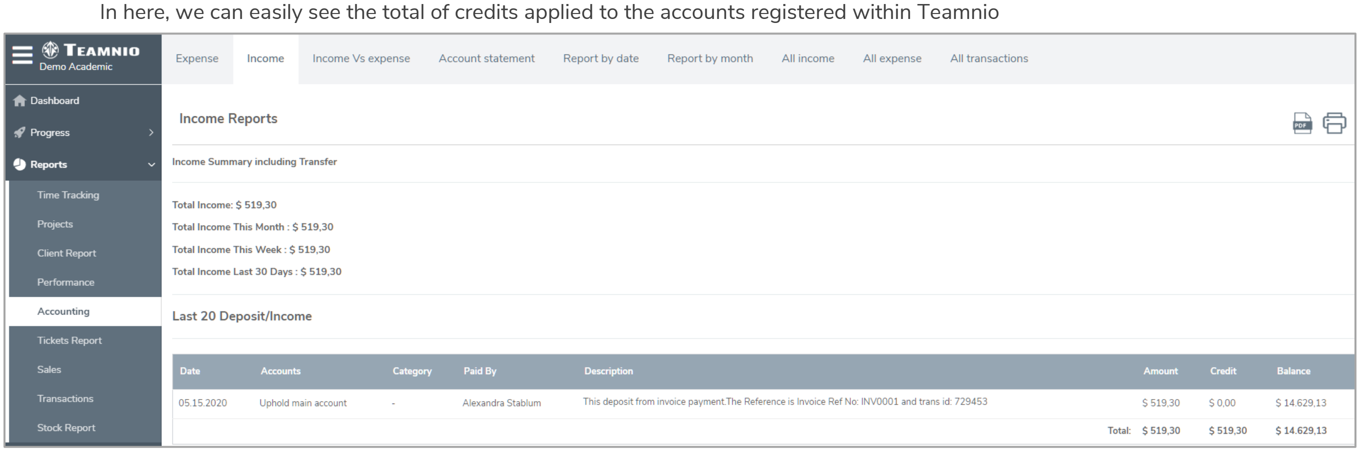
A3.1. Expense Report

The expense report is found in ***Reports > Accounting > Expense tab***
It provides an updated summary of all the debits performed in the registered accounts



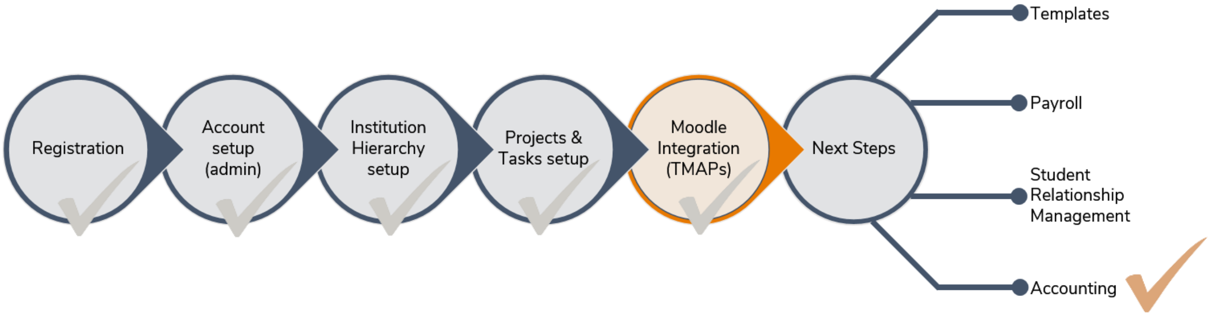
A3.2. Income Report

The income report found in ***Reports > Accounting > Income tab***
In here, we can easily see the total of credits applied to the accounts registered within Teamnio



A4. Check it out!

We've taken full control of the institution's accounting inside Teamnio!
What do you want to explore next? Templates, Payroll, or Student Relationship Management?



TEAMNIO