USER GUIDE

Tamplo

www.tamplo.com

SUMMARY

1 Organize your TAMPLO account

TAMPLO allows you to optimize teamwork by offering a simple solution to connect meetings to decision tracking and action plans.

To take full advantage of TAMPLO's added value, it is important to organize your account according to your expectations and needs. In other words, TAMPLO adapts to your needs and not the other way around.

STEP 1: *My organization*

TAMPLO proposes several levels of organization to structure the monitoring of your activities.

Example:
SUNNY HOMES is an SME of 120 people who build residential projects. Julia is the site manager at "SUNNY HOMES" and is looking to improve the collaboration of her team.

1° Level — **SUNNY HOMES** (Organization)

Users access rights

By default, at each organizational level different user roles are available. These roles have different access rights.*
At a global level, there are two roles: ***Administrator*** and ***User.***

* **These roles are fully configurable and it is possible to add new roles tailored to your organization. To learn more, go to the «**Settings**» module.*

GLOBAL ROLES	ADMIN	USER
User management	✓	✗
Department management	✓	✗
Project management	✓	✗
Service management*	✓	✗
Settings management	✓	✗

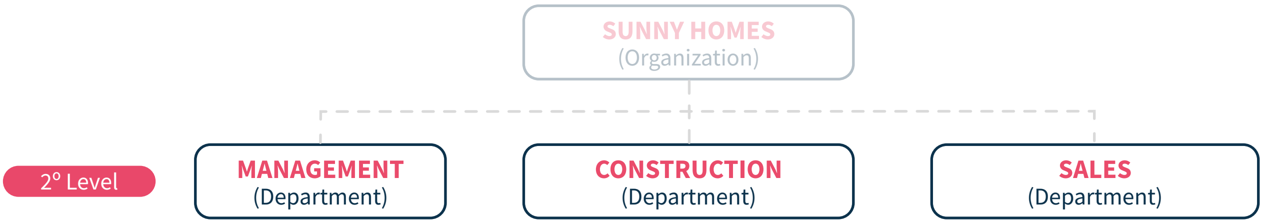
**Intermediate level between departments and projects available upon request.*

ADDITIONAL MODULES (Service management, Settings management)

STEP 2: *My departments*

A department corresponds to a perimeter of activity that groups people working together and is divided into sub-perimeters that correspond to the projects in *TAMPLO.*

> *Example:*
> *Julia is in charge of the construction department at "SUNNY HOMES". Her team is integrated by: Caroline, Arnold and Emily who have the role of "members" within the department.*



Users access rights

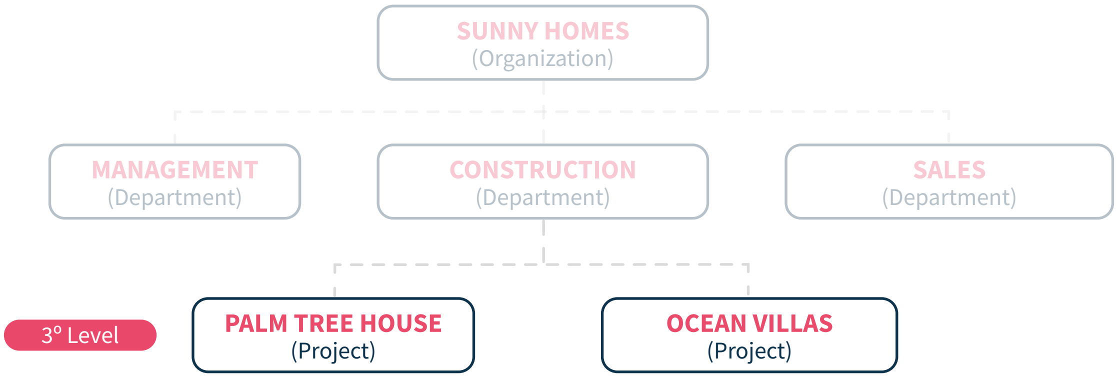
Each department is coordinated by a "*department manager*", and his or her team is integrated by "*members*".

DEPARTMENT	ADMIN	DEPARTMENT MANAGEMENT	MEMBER	
Department projects management	✓	✓	✗	
Department team management	✓	✓	✗	
Services management	✓	✓	✗	ADDITIONAL MODULES

STEP 3: *My projects*

A project corresponds to a sub-perimeter of activity within a department. A project groups people working together on an action plan.

Example:
The "Palm tree house" project team is integrated by Caroline, Arnold y Emily. Caroline is the "project manager" while Arnold and Emily have the role of "project members".
In the "Ocean Villas" project, Julia is the "project manager", and Caroline and Arnold are "project members".



Users access rights

Each project is coordinated by a "***project manager***" and his or her team is integrated by "***project members***".
The same person can be part of several projects at the same time.

PROJECT	ADMIN	DEPARTMENT MANAGER	PROJECT MANAGER	MEMBER
Project modification (name, status, etc.)	✓	✓	✓	✗
Project team management	✓	✓	✓	✗
Creation of tasks	✓	✓	✓	✓
Meetings organization	✓	✓	✓	✓
Modify / delete tasks created by others	✓	✓	✓	✗
Phases management	✓	✓	✓	✗
Phases visualization	✓	✓	✓	✓

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User stories management	✓	✓	✓	✗
User stories visualization	✓	✓	✓	✓
Dashboard visualization	✓	✓	✓	✓
Share documents	✓	✓	✓	✗
Documents visualization	✓	✓	✓	✓

STEP 4: *Everyday use*

TAMPLO allows to **connect** in a single collaborative platform **different organizational levels** (departments, projects, etc.) with their **action plans** and **meetings.**

1. MEETINGS

A **meeting** corresponds to a **gathering**, physical or not, single or recurrent, between different **people who collaborate** in **common perimeters**, whose purpose is to analize, discuss, help each other, make decisions and plan the activities to be carried out in order to achieve the exchanges made.

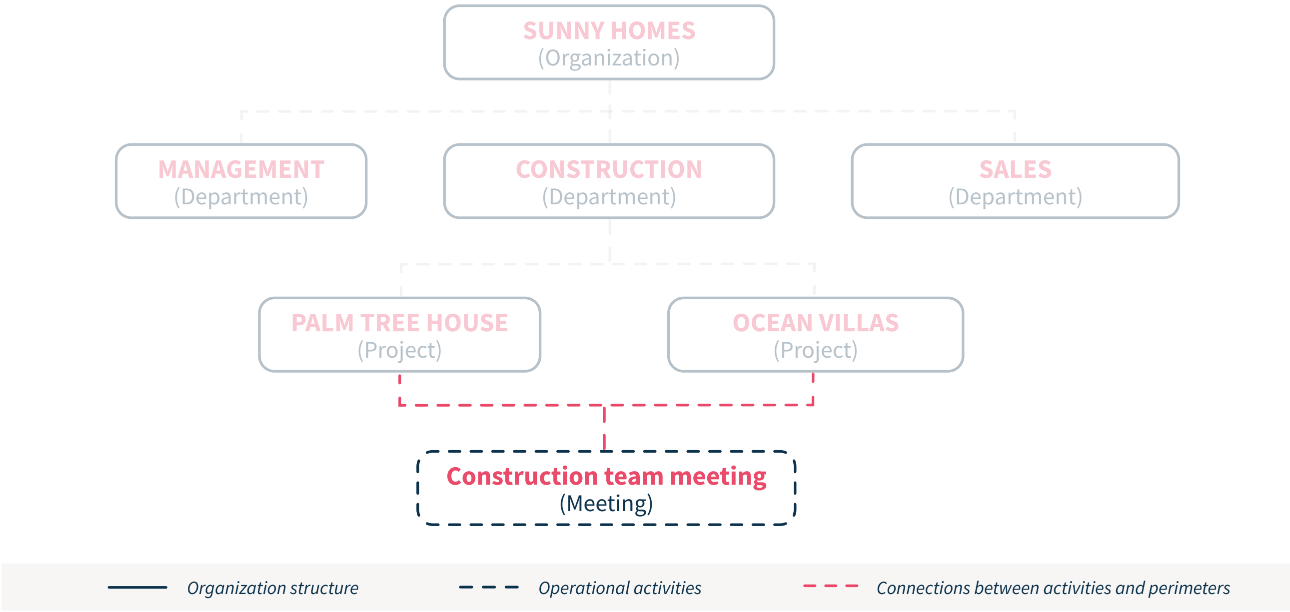
A meeting is composed by:

- Meeting name
- Invitees
- Start and end date and time
- A perimeter
- A meeting agenda that can be connected to an action plan and decisions
- A conclusion

It can also have:

- A recurrency (weekly, monthly…)
- Particular permissions to make the meeting more or less collaborative
- A place
- A link to a videoconference
- Documents

> *Example:*
> *Julia, Arnold, Emily and Caroline meet every Monday morning at 10:00 am to review ongoing projects. Therefore, this is a weekly meeting. They can easily access the previous meeting minutes and follow the progress of the actions decided from week to week.*
> *Julia is the organizer of this meeting and gave her team permissions to contribute to the meeting agenda by adding tasks and topics to be discussed.*



Users access rights

The permissions given to meeting participants are defined at the time of organizing the meeting.
The organizer can authorize his or her guests to contribute to the meeting agenda by adding topics, comments or tasks. He or her can also ask them to validate the meeting minutes.

MEETING	ADMIN	DEPARTMENT MANAGER	PROJECT MANAGER	MEMBER
Organize a meeting	✓	✓	✓	✓
Meeting visualization	✓	✓	✓	✓ *Only if invitee
Participate on a meeting (options defined by the organizer)	✓	✓	✓	✓ *Only if invitee
Add documents to a meeting	✓	✓	✓	✓ *Only if invitee
Accès aux documents d’une réunion	✓	✓	✓	✓ *Only if invitee
Modify a meeting	✓	✓	✓	✓ *Only if organizer
Minute of meeting visualization	✓	✓	✓	✓ *Only if invitee

2. TASKS

A **task** corresponds to an **objective** that a person must **complete** by a **specific date.**

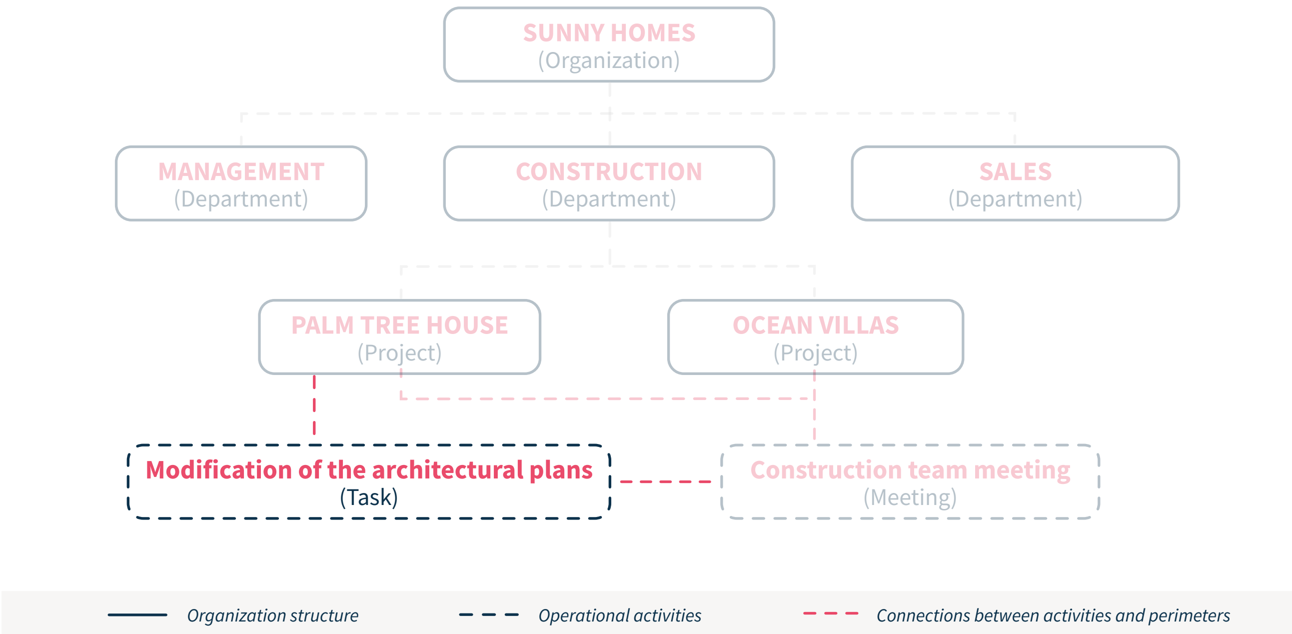
A task contains:

- Name
- Due date
- Importance level
- It belongs to a perimeter
- An owner
- A progress status (By default: OPEN, IN PROGRESS, VALIDATION PENDING, LATE, COMPLETED and CANCELED) **In order to modify these statuses go to the «**Settings**» module.*

It can also have:

- A description (text, imges, videos…)
- One or more followers
- One or more sub-tasks
- Documents
- Comments

Example:
Julia assigns Arnold a task to review and modify the plans for "Palm tree House" by Friday, June 11. This task is critical.
After being notified, Arnold may change the progress status of the task from "OPEN" to "IN PROGRESS" and ask Julia to share the plans to be modified to the task documents.
Arnold can also ask Emily to help him complete this task by adding her as a follower. Once the task is done, Arnold will change the status from "IN PROGRESS" to "COMPLETED".
Julia will be notified of the progress as she is the creator of the task, and will be able to add a comment to Arnold: "Thank you very much for the modifications of the plans Arnold :)".



Users access rights

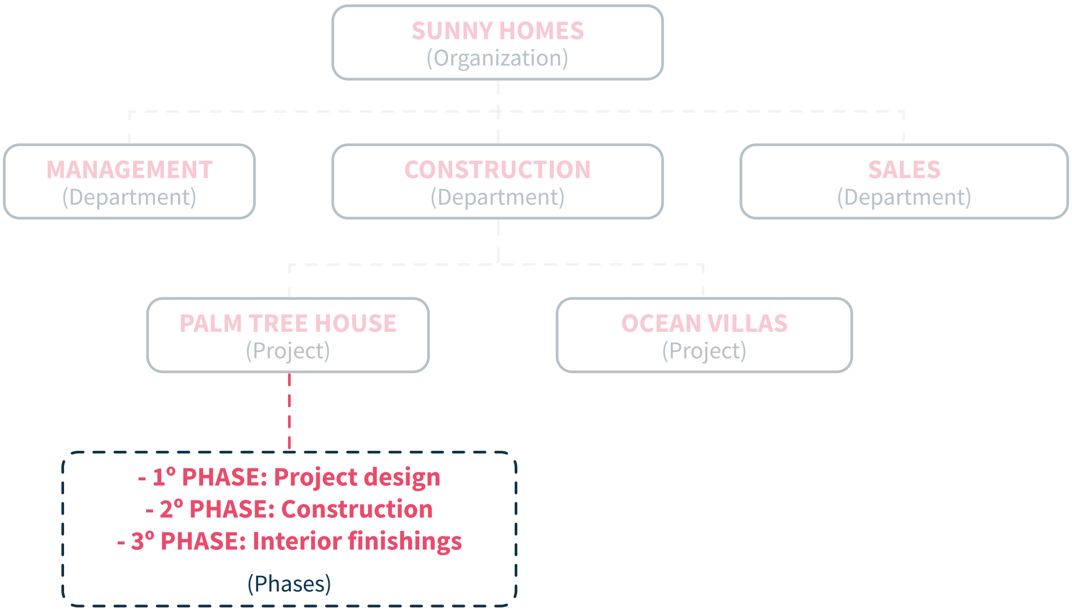
Tasks are created within a project.

TASKS	ADMIN	DEPARTMENT MANAGER	PROJECT MANAGER	MEMBER
Creation of a task	✓	✓	✓	✓
Visualization of a task	✓	✓	✓	✓ **Only if creator, owner or follower*
Add documents to a task	✓	✓	✓	✓ **Only if creator, owner or follower*
Access to documents in a task	✓	✓	✓	✓ **Only if creator, owner or follower*
Modification of a task *(name, description, owner and due date)*	✓	✓	✓	✓ **Only if creator*
Modification of a progress status of a task	✓	✓	✓	✓ **Only if creator, owner or follower*
Creation of a sub-task	✓	✓	✓	✓ **Only if creator, owner or follower*
Add a comment	✓	✓	✓	✓ **Only if creator, owner or follower*
Delete a task	✓	✓	✓	✓ **Only if creator*

3. PHASES

A phase is a **sub-perimeter of a project limited in time** with a start and end date.
A phase **allows grouping tasks** to be performed within a certain time limit.

> *Example:*
> *Julia has created three phases to better manage the "Palm tree house" project:*
> - *1ª PHASE: Project design*
> - *2ª PHASE: Construction*
> - *3ª PHASE: Interior finishings*



Organization structure — *Operational activities* — *Connections between activities and perimeters*

Users access rights

PHASES	ADMIN	DEPARTMENT MANAGER	PROJECT MANAGER	MEMBER
Creation and modification of a phase	✓	✓	✓	✗
Visualization of a phase	✓	✓	✓	✓
Visualization of the tasks in a phase	✓	✓	✓	✓ *Only if owner

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Management of the tasks whithin a phase	✓	✓	✓	✗
Add documents to a phase	✓	✓	✓	✓
Access documents of a phase	✓	✓	✓	✗
Delete a phase	✓	✓	✓	✗

4. USER STORIES

A user story **allows you to centrilize information** (text, images, videos…) that are relevant to a project in order to create an action plan related to it.

A user story can be considered as a **project sub-perimeter.**

Example:

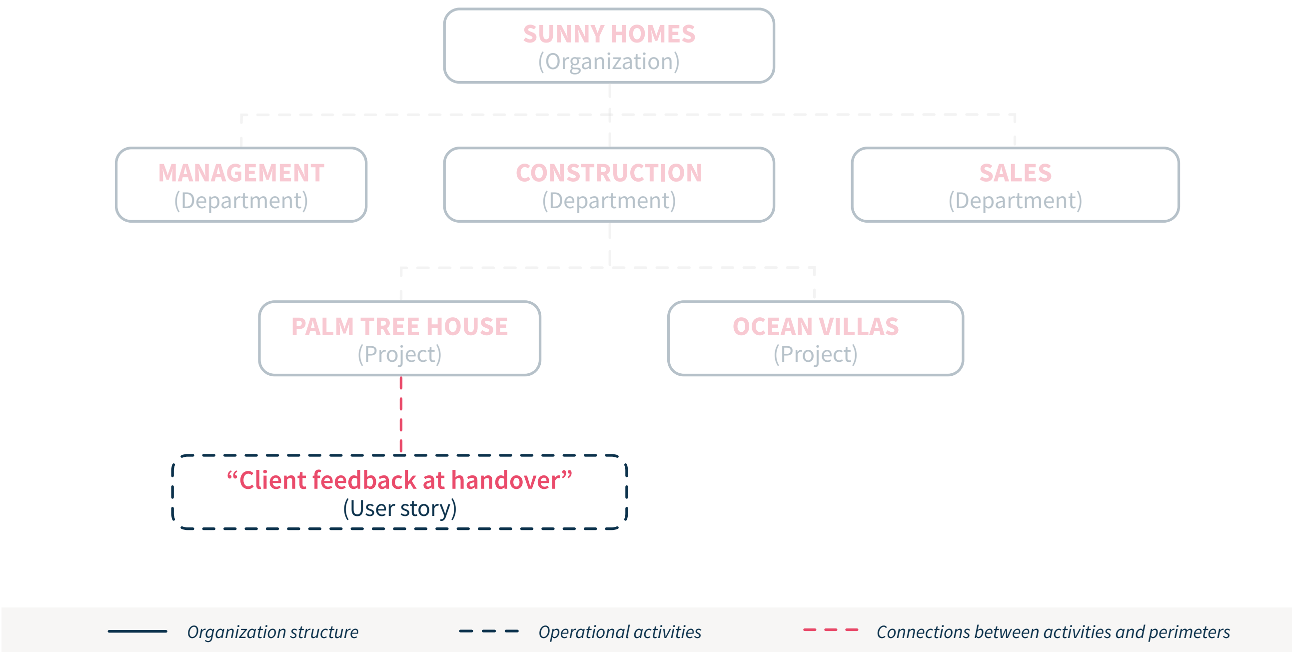
Julia has added a user story about client feedback on the "Palm tree house" project:

User story name: "Client feedback at handover"

Here is the list of things to do before they move in:

- Repaint bedroom 2.

- Replace broken tile in downstairs bathroom.



Users access rights

USER STORIES	ADMIN	DEPARTMENT MANAGER	PROJECT MANAGER	MEMBER
Creation and modification of a user story	✓	✓	✓	✕
Visualization of a user story	✓	✓	✓	✓
Visualization of the tasks in a user story	✓	✓	✓	✓ *Only if owner*
Management of the tasks whithin a user story	✓	✓	✓	✕
Add documents to a user story	✓	✓	✓	✓
Access documents of a user story	✓	✓	✓	✕
Delete a user story	✓	✓	✓	✕

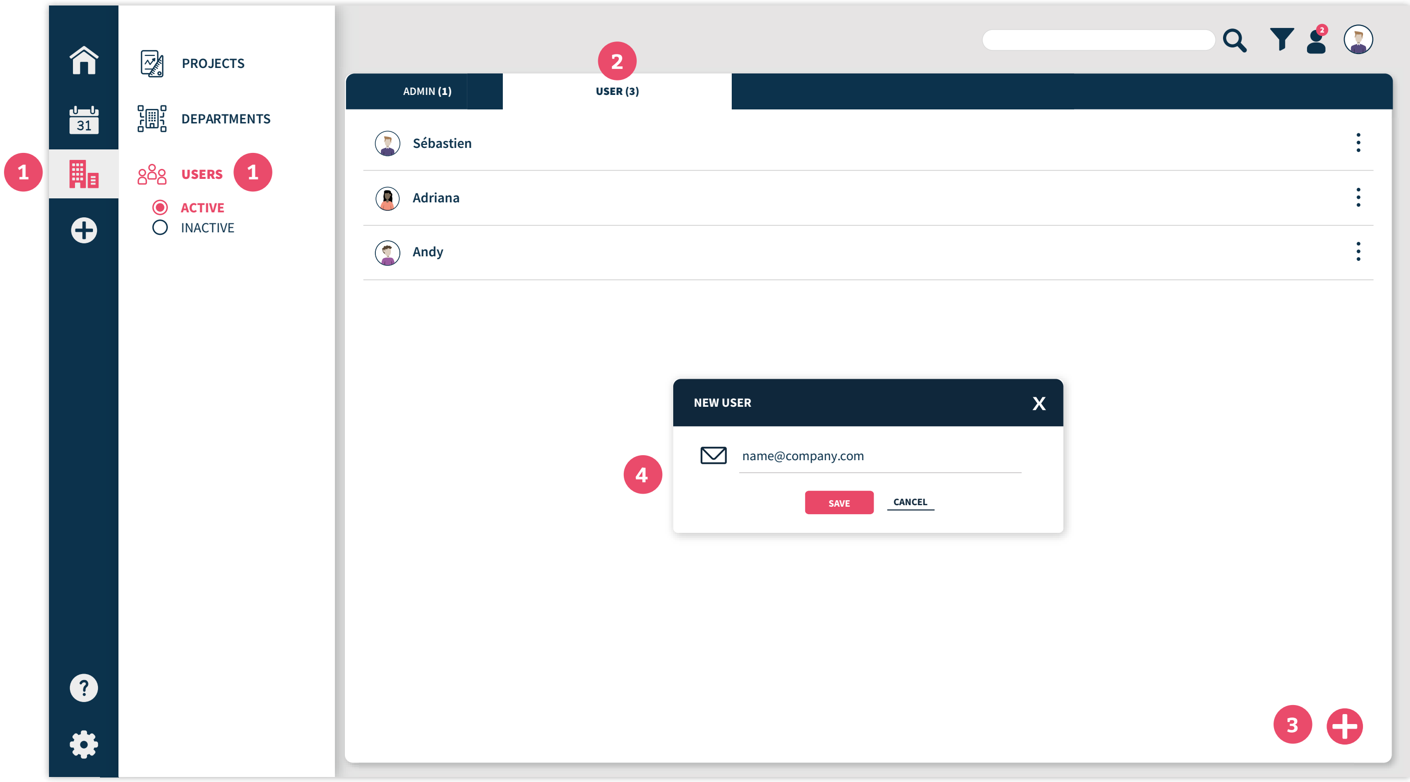
2 Users management

By default, this module is only accessible to **ADMINISTRATORS. Please refer to the **"Settings"** module if you wish to make changes.*

2.1 Add a user

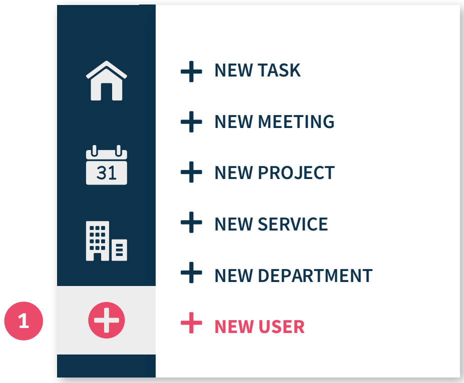
2.1.1 Add a user from «USERS» page

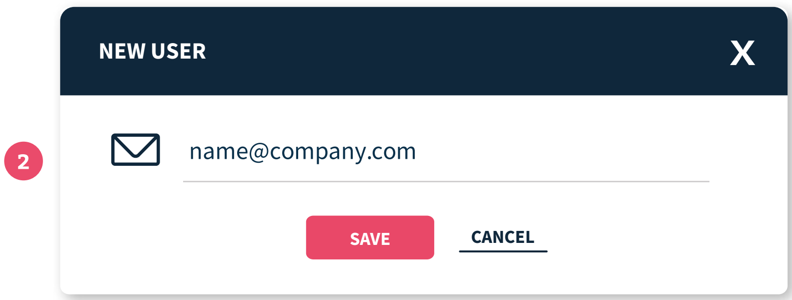
1. Click on the «*ORGANIZATION*» button on the left sidebar of your screen, then click on «*USERS*» option.
2. Click on the tab of the role you wish to assign to the user.
3. Click on the «+» button at the bottom right of your screen.
4. Enter the user's email address, then click on «*SAVE*»



2.1.2 Add a user from other pages

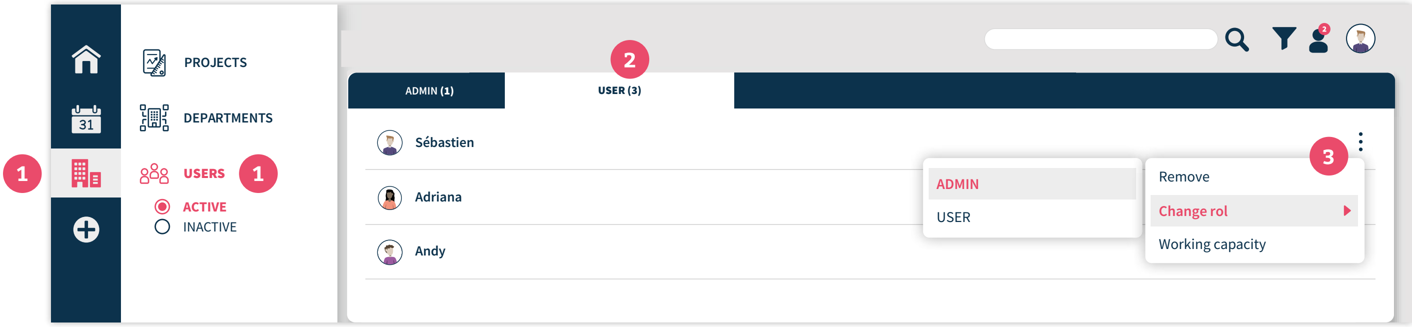
1. Click on the «*ADD*» button on the left sidebar of your screen, then click on «*NEW USER*» option.
2. Enter the user's email address, then click on «*SAVE*»





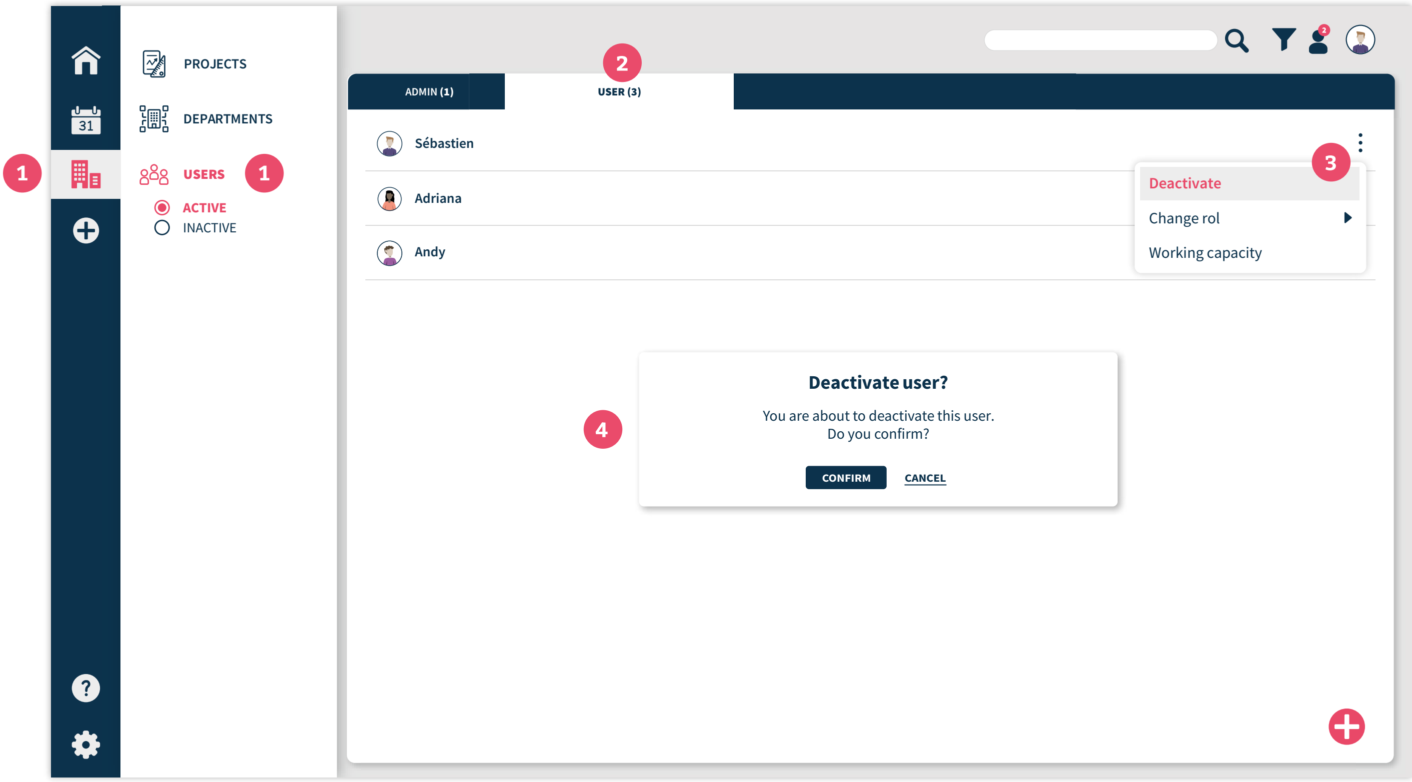
2.2 Modify a user's role

1. Click on the *«ORGANIZATION»* button on the left sidebar of your screen, then click on *«USERS»* option.
2. Click on the user's role tab.
3. Click on the *«Three dots»* button on the right side of your screen on the user's line, then click on *«Change role»*, then click on the desired role.



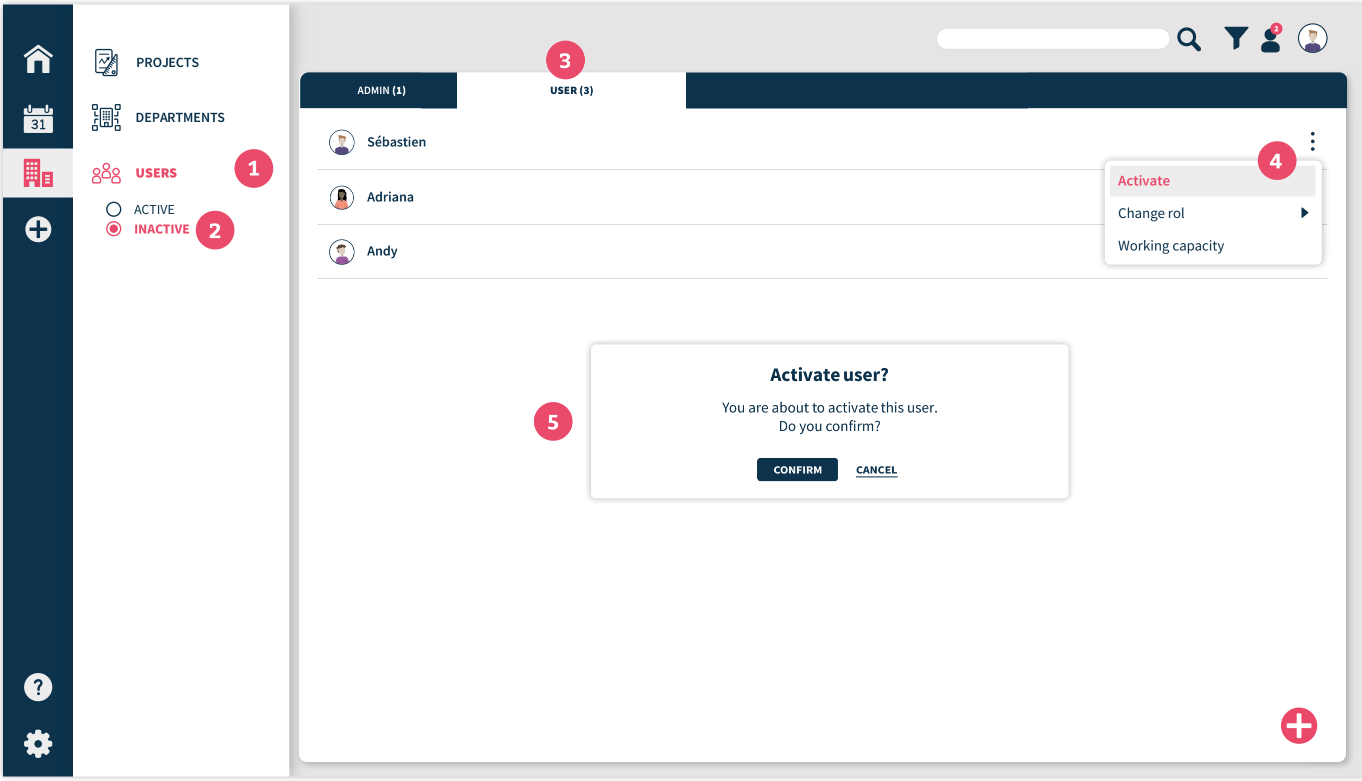
2.3 Deactivate a user

1. Click on the *«ORGANIZATION»* button on the left sidebar of your screen, then click on *«USERS»* option.
2. Click on the user's role tab.
3. Click on the *«Three dots»* button on the right side of your screen on the user's line, then click on *«Deactivate»*
4. Click on *«Confirm»*



2.4 Activate a user

1. Click on the «*ORGANIZATION*» button on the left sidebar of your screen, then click on «*USERS*» option.
2. Activate the «*INACTIVE*» option.
3. Click on the user's role tab.
4. Click on the «*Three dots*» button on the right side of your screen on the user's line, then click on «*Activate*»
5. Click on «*Confirm*»

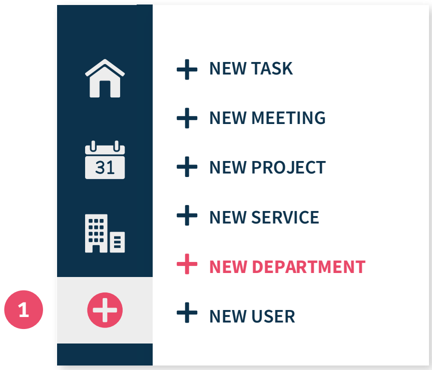


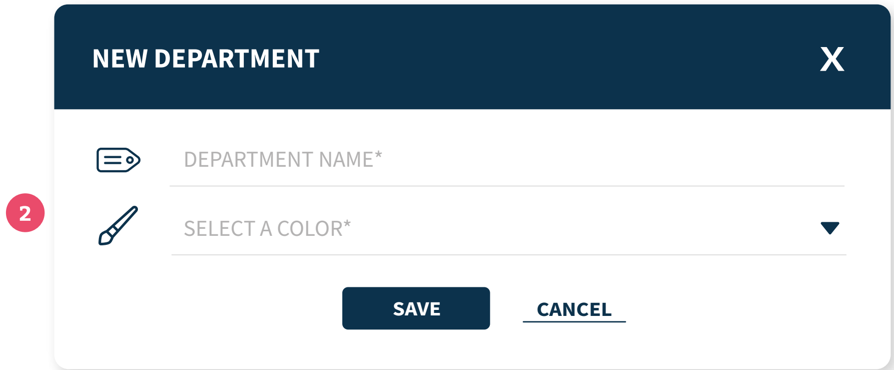
3 Departments management

*By default, this module is only accessible to **ADMINISTRATORS**.*
*Please refer to the **"Settings"** module if you wish to make changes.*

3.1 Add a department

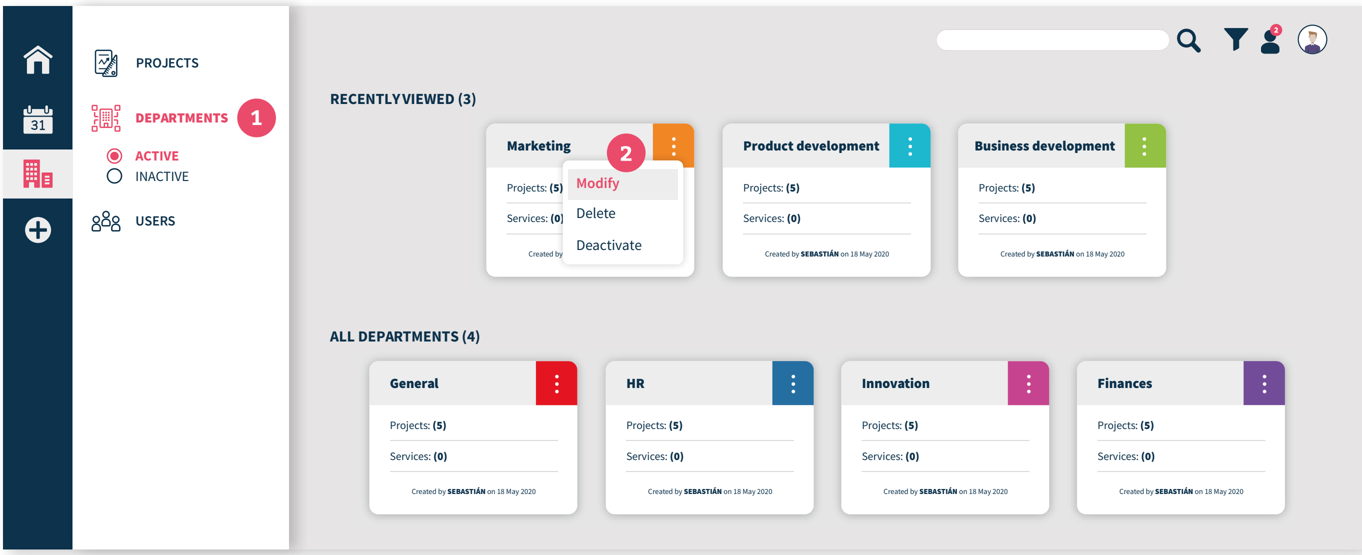
1. Click on the «*ADD*» button on the left sidebar of your screen, then click on «*NEW DEPARTMENT*» option.
2. Enter the name of the department and assign a color, then click on «*SAVE*»

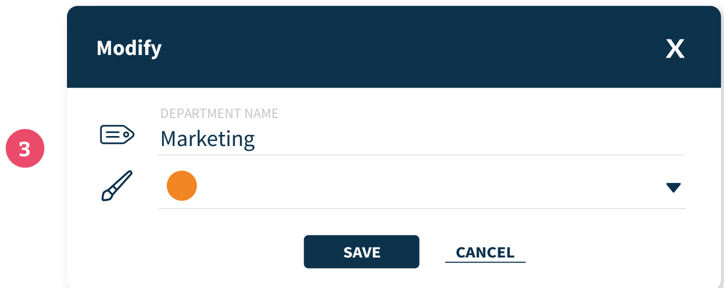




3.2 Modify a department

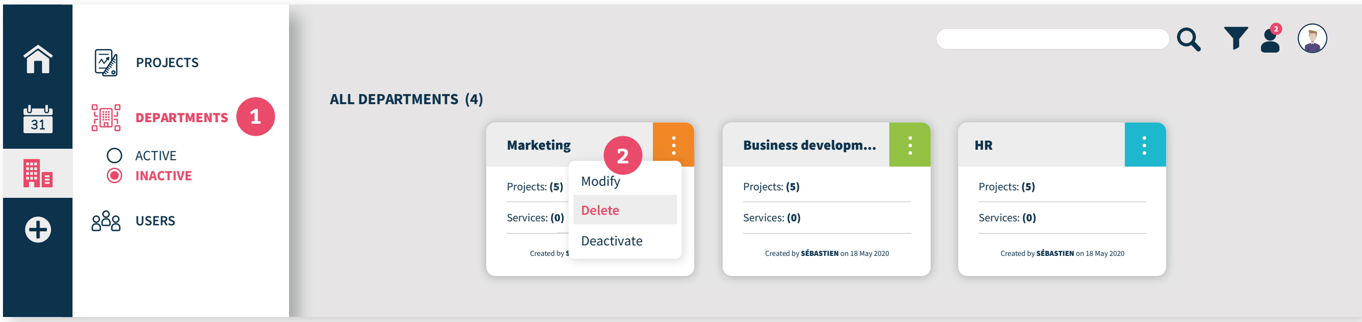
1. Click on the «*ORGANIZATION*» button on the left sidebar of your screen, then click on «*DEPARTMENTS*» option.
2. Click on the «*Three dots*» at the top right of the department box, then click on «*Modify*»
3. Modify the department name or colour, then click on «*Save*»

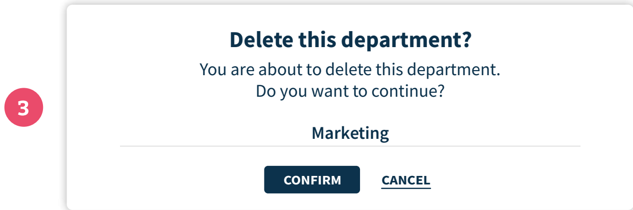




3.3 Delete a department

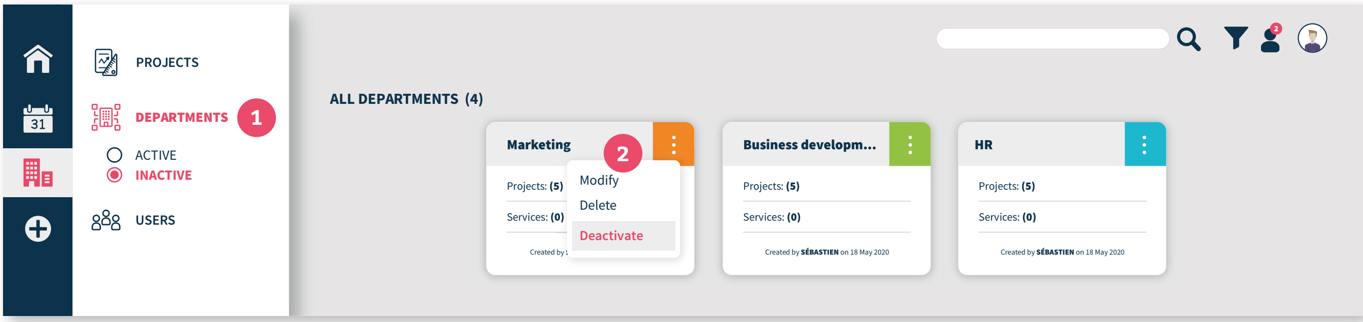
1. Click on the «*ORGANIZATION*» button on the left sidebar of your screen, then click on «*DEPARTMENTS*» option.
2. Click on the «*Three dots*» at the top right of the department box, then click on «*Delete*»
3. Click on «*Confirm*»

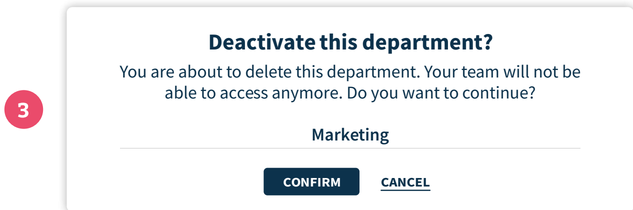




3.4 Deactivate a department

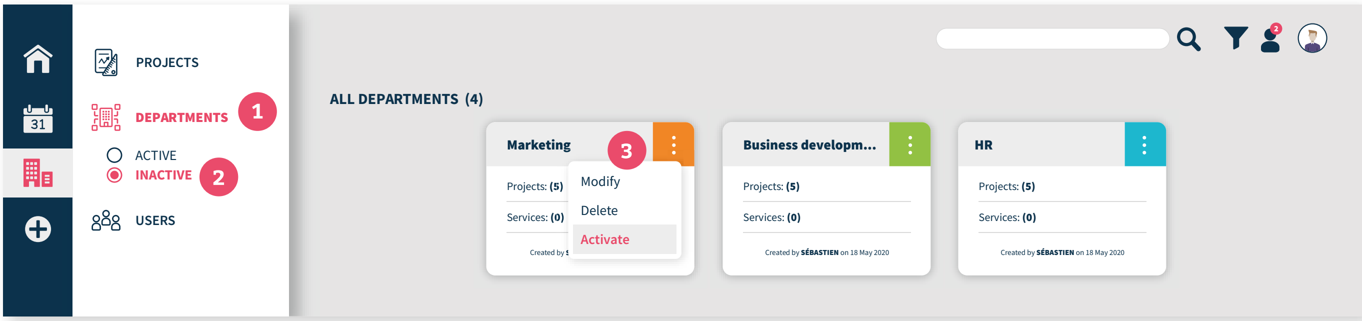
1. Click on the «*ORGANIZATION*» button on the left sidebar of your screen, then click on «*DEPARTMENTS*» option.
2. Click on the «*Three dots*» at the top right of the department box, then click on «*Deactivate*»
3. Click on «*Confirm*»

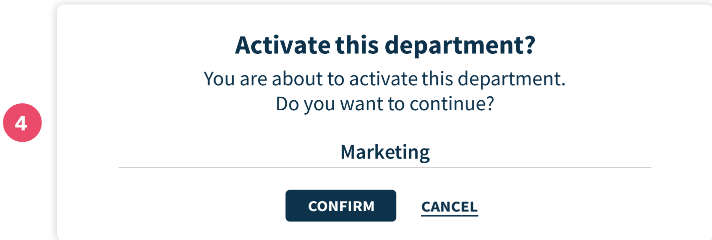




3.5 Activate a department

1. Click on the *«ORGANIZATION»* button on the left sidebar of your screen, then click on *«DEPARTMENTS»* option.
2. Activate the *«INACTIVE»* option.
3. Click on the *«Three dots»* at the top right of the department box, then click on *«Activate»*
4. Click on *«Confirm»*



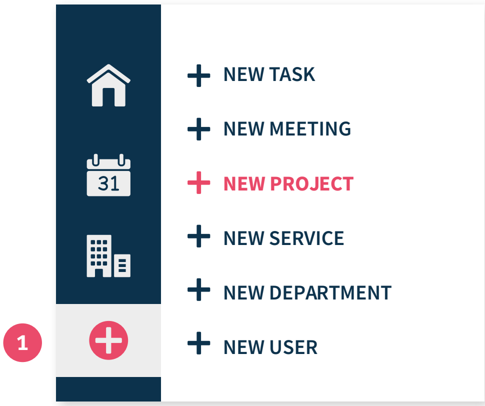


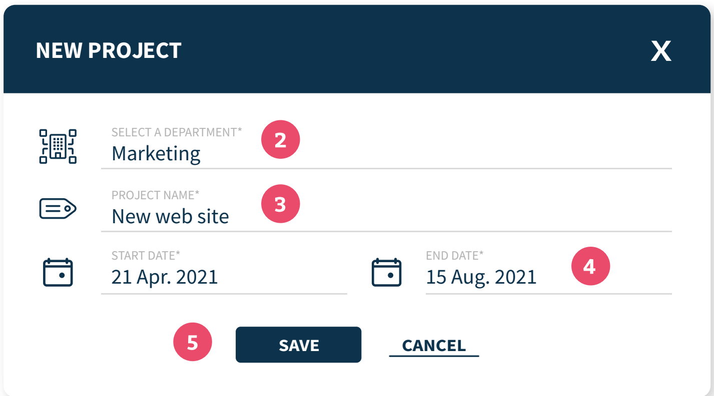
4 Projects management

By default, this module is only accessible to **ADMINISTRATORS and **DEPARTMENT MANAGERS**.*
*Please refer to the **"Settings"** module if you wish to make changes.*

4.1 Add a project

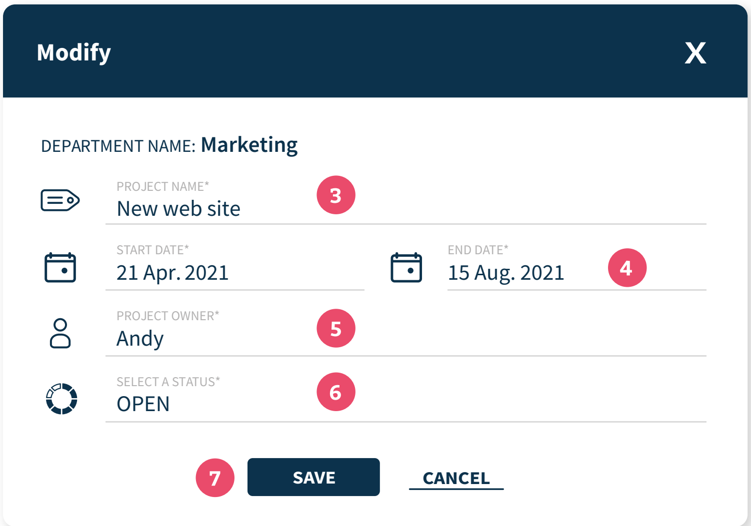
1. Click on the «*ADD*» button on the left sidebar of your screen, then click on «*NEW PROJECT*» option.
2. Enter the department of which the project will be part of.
3. Enter the project name.
4. Enter the start and end date (optional).
5. Click on «*SAVE*»





4.2 Modify a project

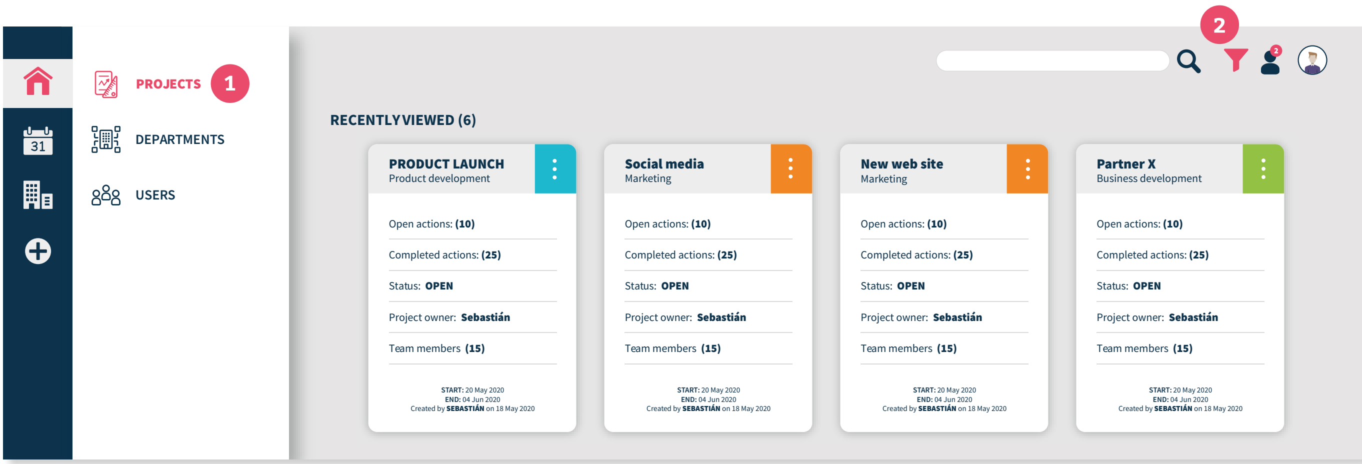
1. Click on the «*ORGANIZATION*» button on the left sidebar of your screen, then click on «*PROJECTS*» option.
2. Click on the «*Three dots*» at the top right of the project box, then click on «*Modify*»



3. Modify the project name.
4. Modify the start and / or end date.
5. Modify the project owner.
6. Modify the project status.
7. Click on *«SAVE»*

4.3 Find a project from the list of all projects

1. Click on the *«ORGANIZATION»* button on the left sidebar of your screen, then click on *«PROJECTS»* option.
2. Click on the filter button at the top right of the screen:
   - Filter your projects by department(s). ***(Fig. 1)***
   - And / or filter your projects by status. ***(Fig. 1)***



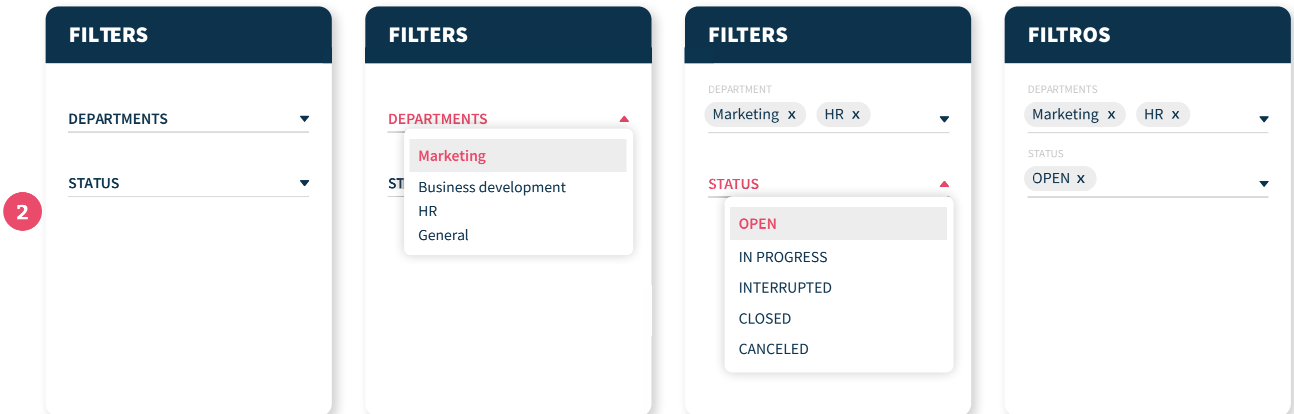
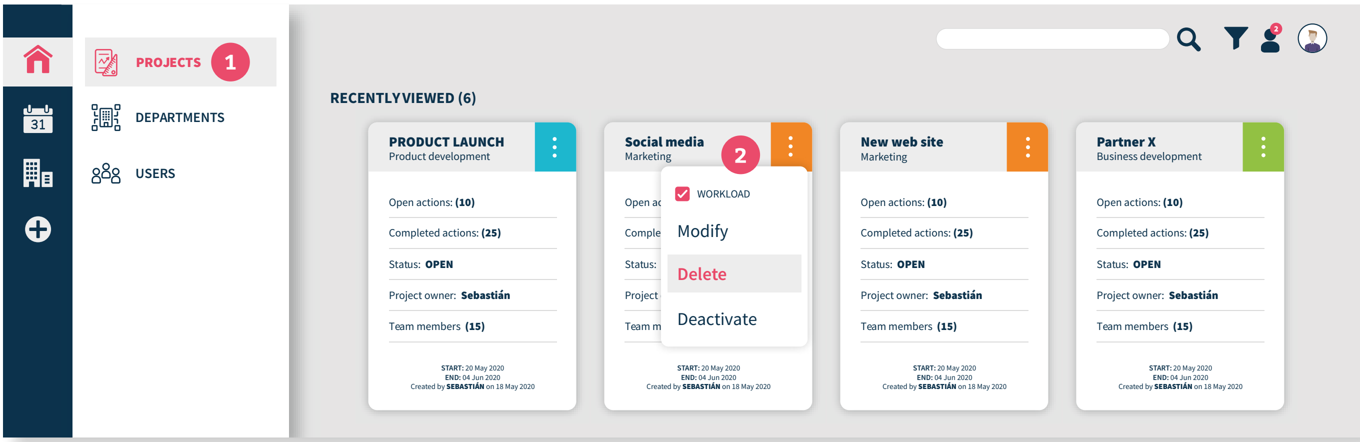
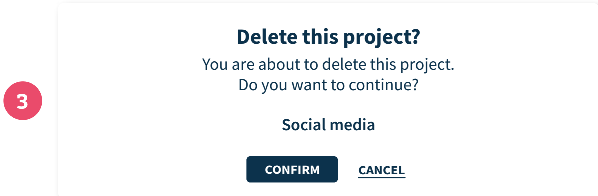


Fig. 1

4.4 Delete a project

1. Click on the *«ORGANIZATION»* button on the left sidebar of your screen, then click on *«PROJECTS»* option.
   Click on the *«Three dots»* at the top right of the project box, then click on *«Delete»*
2. Click on *«CONFIRM»*





*Access to the functions described below depends on your user role in a project. For more information, see the module **"Organize your TAMPLO account"***

4.5 Features available within a project

4.5.1 Dashboard: The dashboard provides an overview of the project tasks (deadlines, status, users and/or importance) *(Fig. 2)*

1. To access the detailed views from the dashboard, click on a pie chart to display the list of associated tasks.

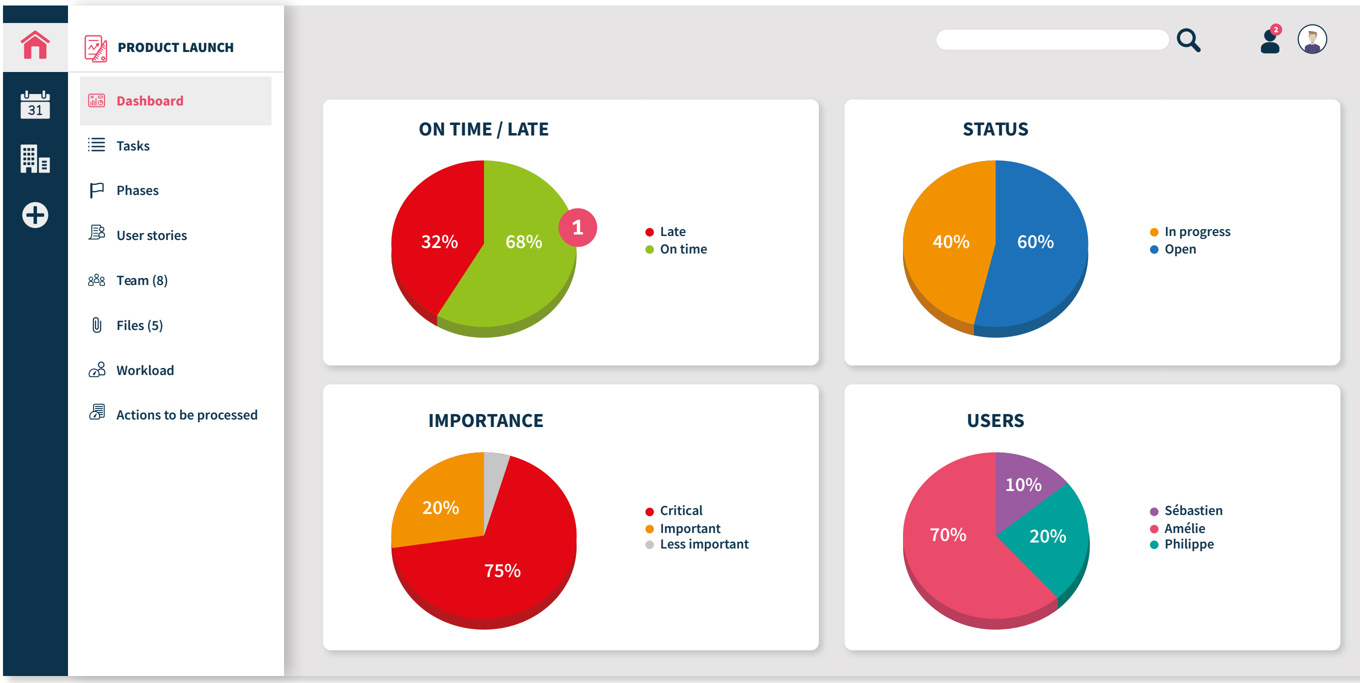
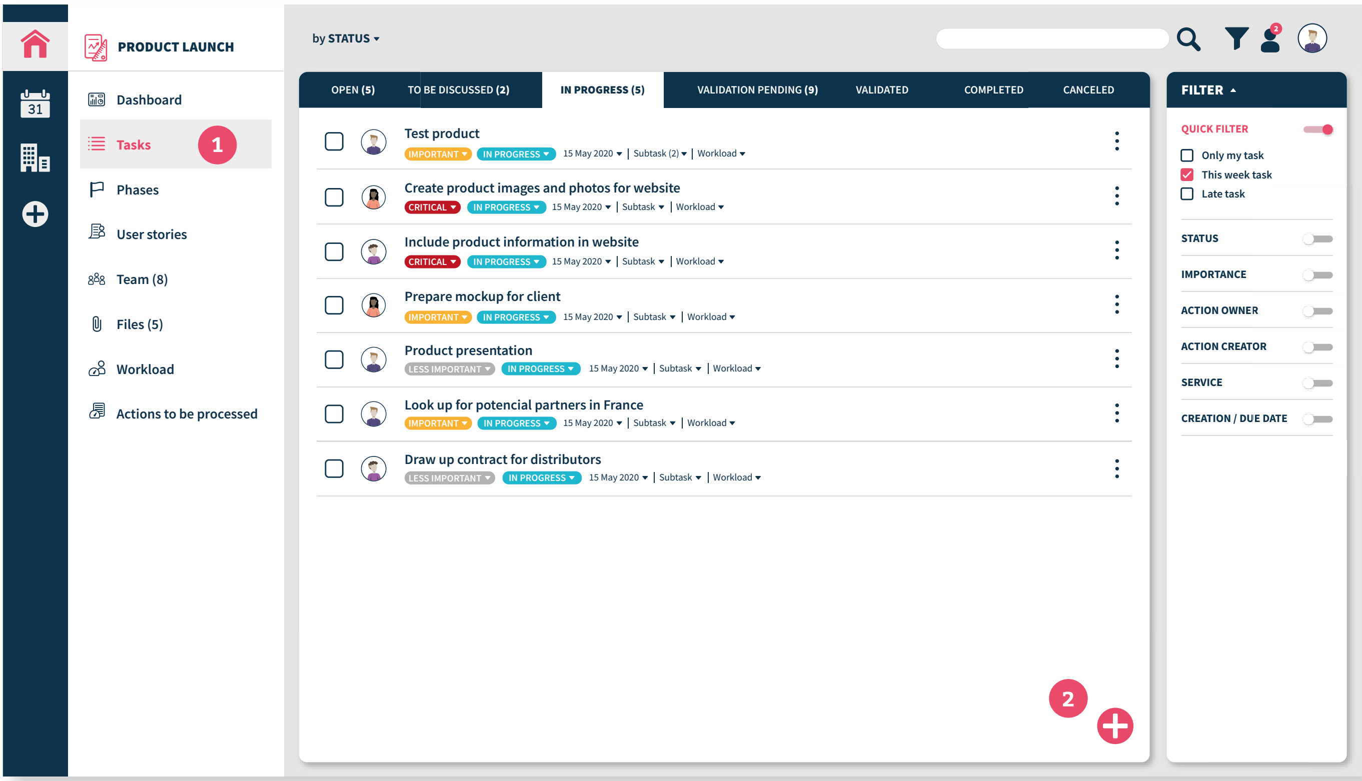


Fig. 2

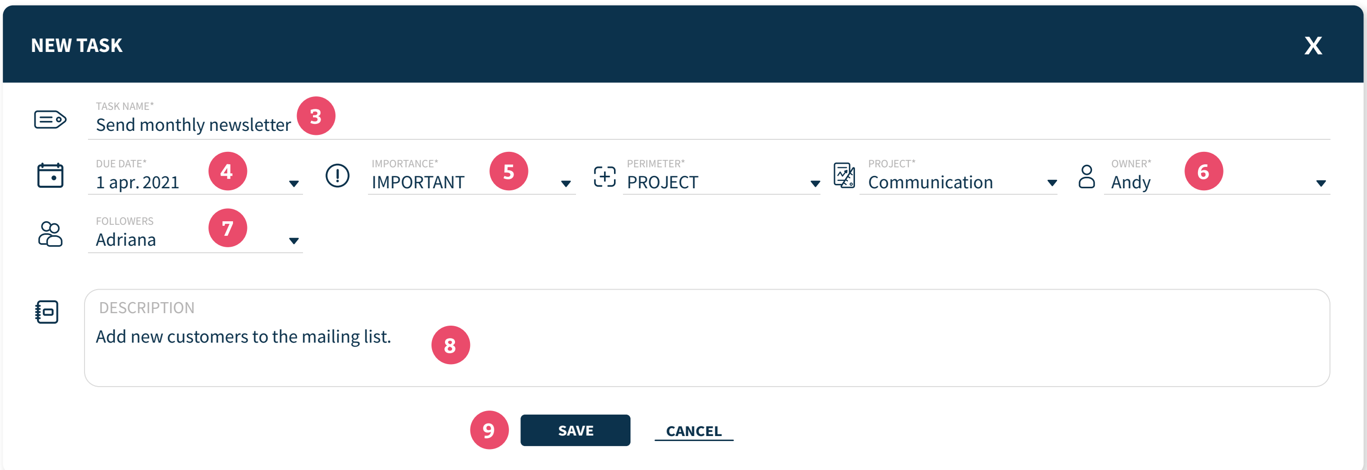
4.5.2 Tasks

1. Click on the «*Tasks*» option on the project features menu.
2. Click on the «+» button at the bottom right of the screen.



3. Enter the task name.
4. Enter the task due date (By default today plus seven days).
5. Enter the task importance (by default «IMPORTANT»).
6. Enter the task owner.
7. Enter the task followers (optional).
8. Enter the task description (optional).
9. Click on «*SAVE*»

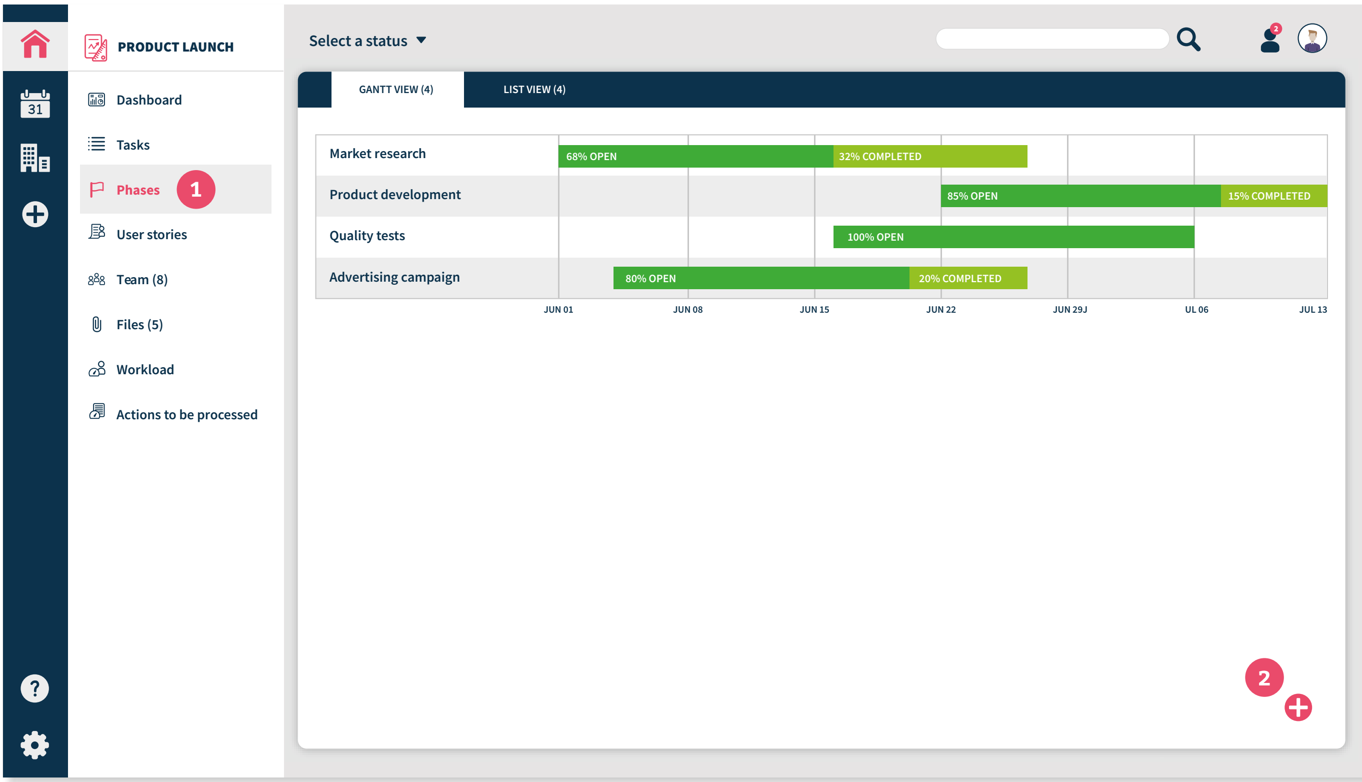
** The owner and followers will be notified.*



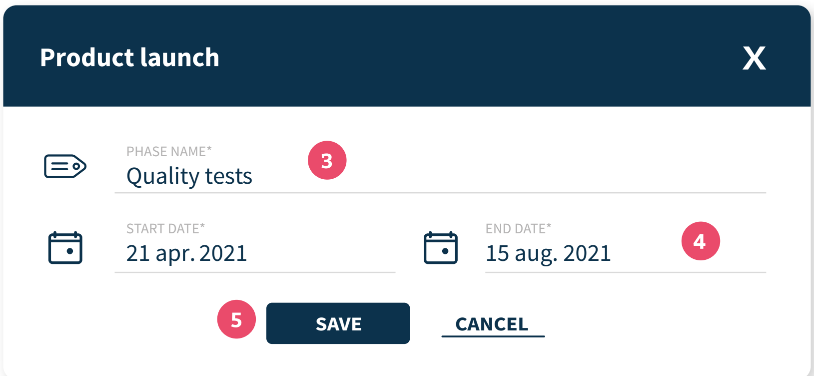
4.5.3 Project phases

4.5.3.1 Add a phase

1. Click on the «*Phases*» option on the project features menu.
2. Click on the «+» button at the bottom right of the screen.

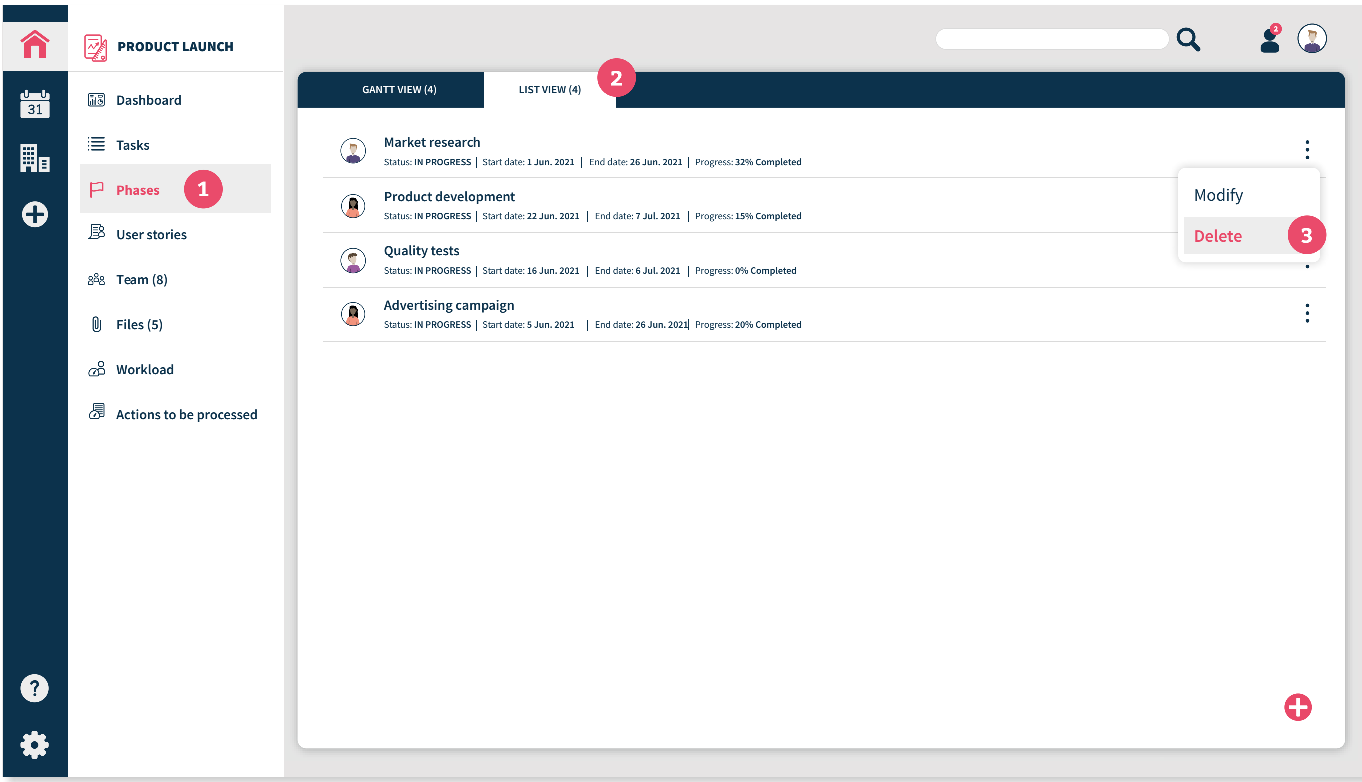


3. Enter the phase name.
4. Enter a start and end date.
5. Click on «*SAVE*»

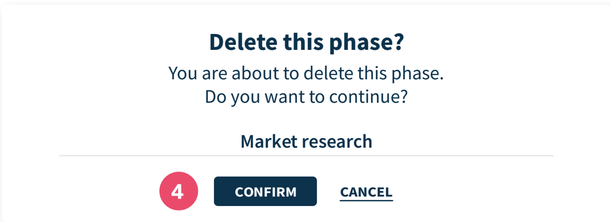


4.5.3.2 Delete a phase

1. Click on the «*Phases*» option on the project features menu.
2. Click on the « *List view*» tab.
3. Click on the «*Three dots*» button on the right side of your screen on the phase line, then click on «*Delete*»



4 Click on «*CONFIRM*»

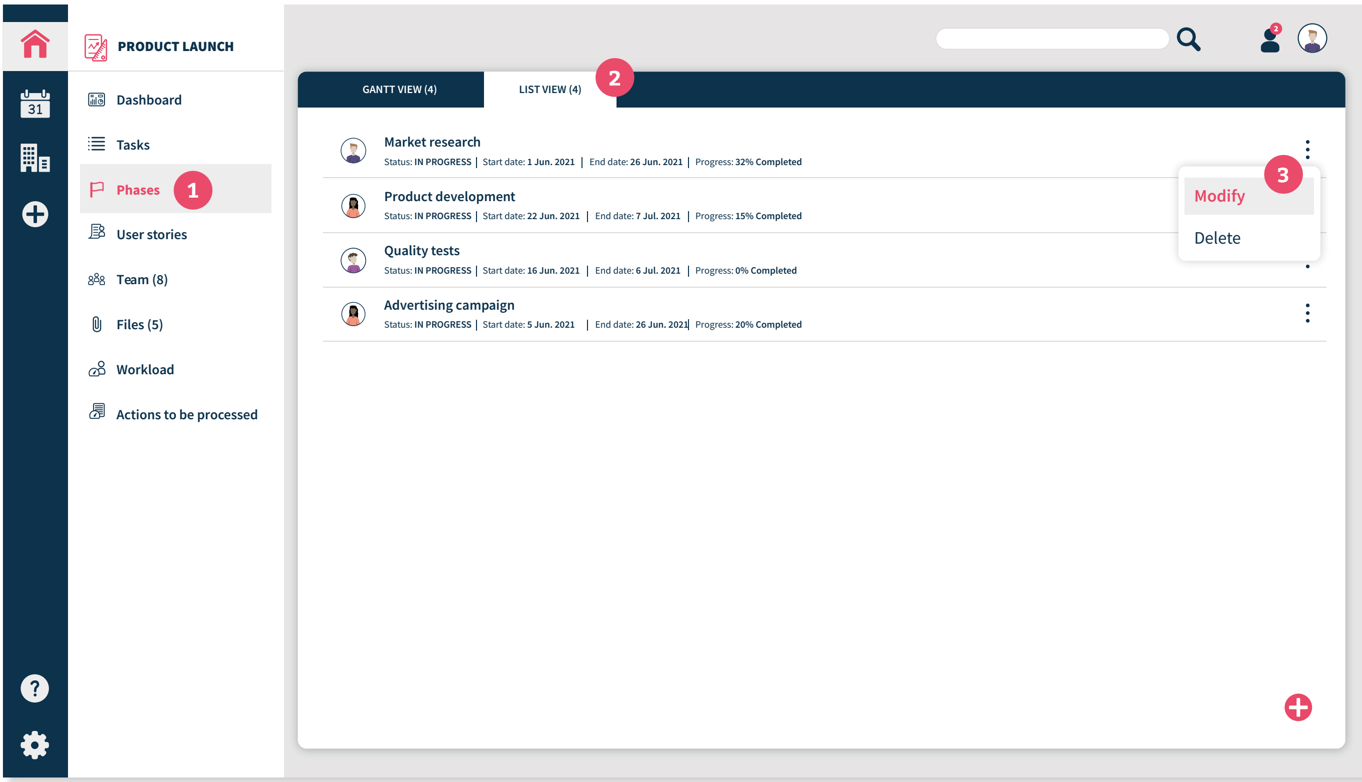


4.5.3.3 Find a phase

1 Click on the «***Select a status***» drop-down menu at the top of your screen, then select the desired status.

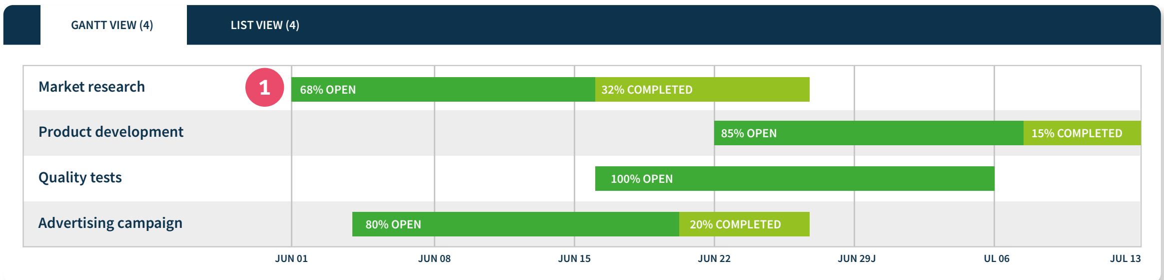
4.5.3.4 Modify a phase

1 Click on the «*Phases*» option on the project features menu.
2 Click on the « *List view*» tab.
3 Click on the «*Three dots*» button on the right side of your screen on the phase line, then click on «*Modify*»



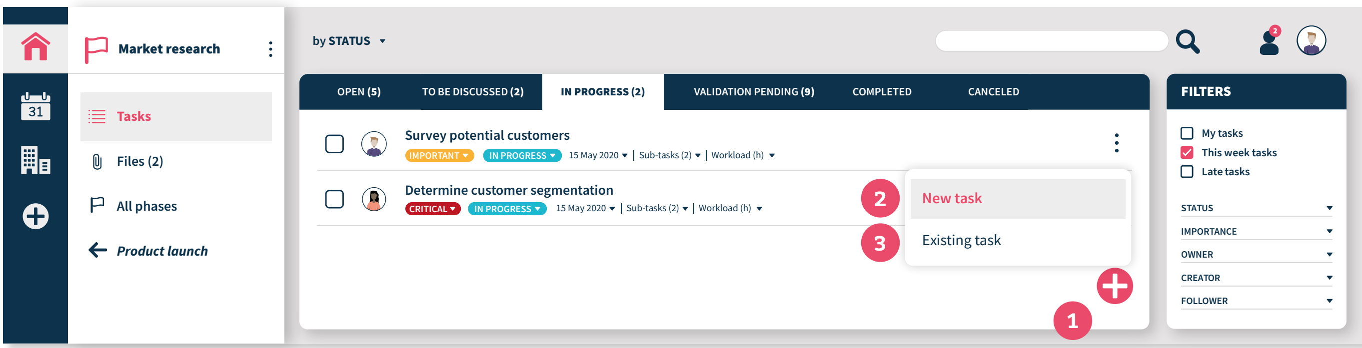
4.5.3.5 View a phase

1. Click on the phase from the «*Calendar view*»



4.5.3.6 Attach a task to a phase

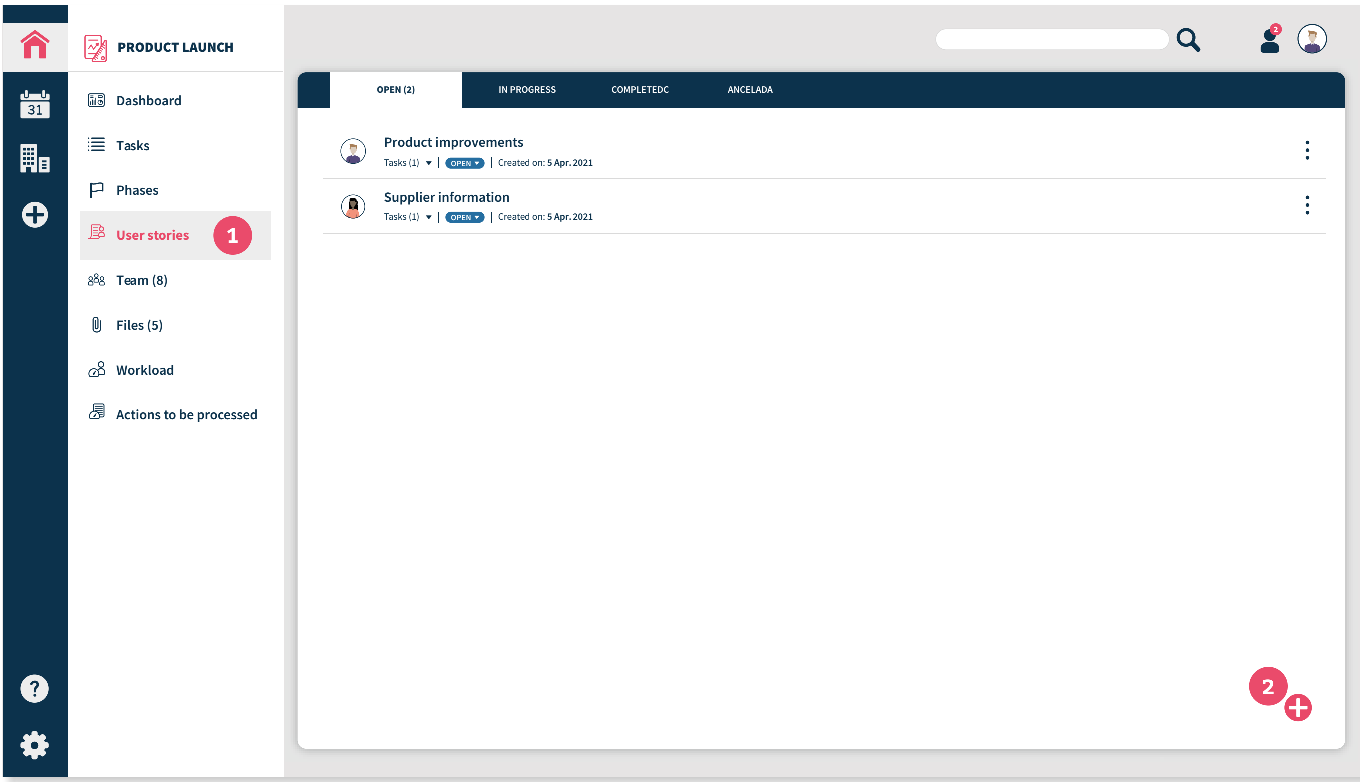
1. Click on the «+» button at the bottom right of the screen.
2. Click on «*New task*» to create a new task to be added to the phase. This task will also be visible from «*Project*», «*Departement* » and «*All tasks*» views.
3. Click on «*Existing task*» to attach an existing task to the phase.



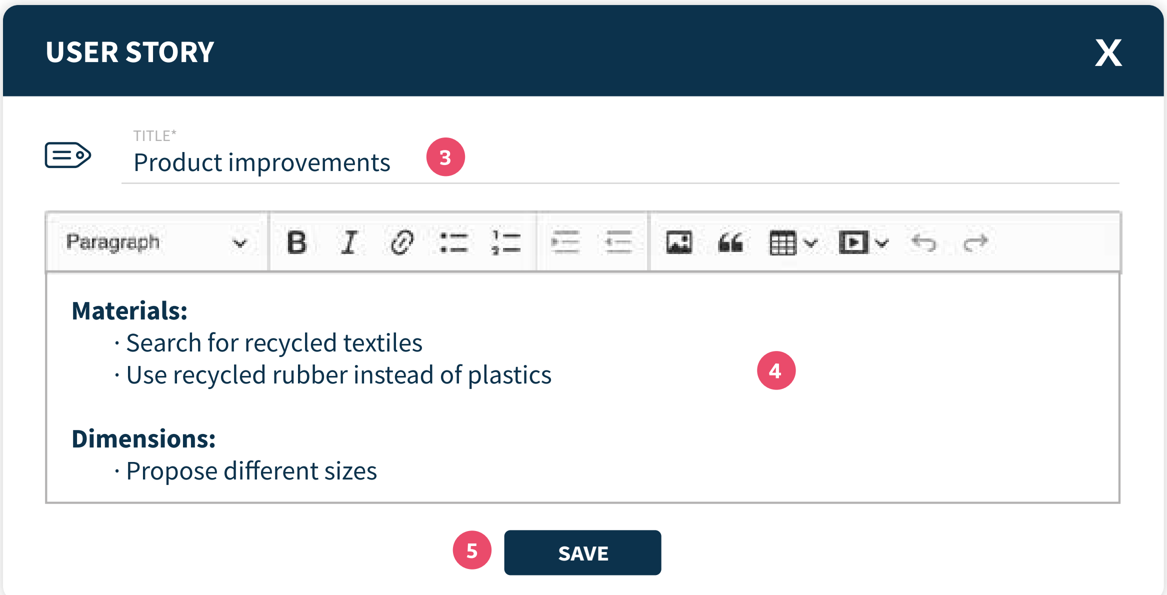
4.5.4 User story in a project

4.5.4.1 Add a user story

1. Click on the «*User stories*» option on the project features menu.
2. Click on the «+» button at the bottom right of the screen.

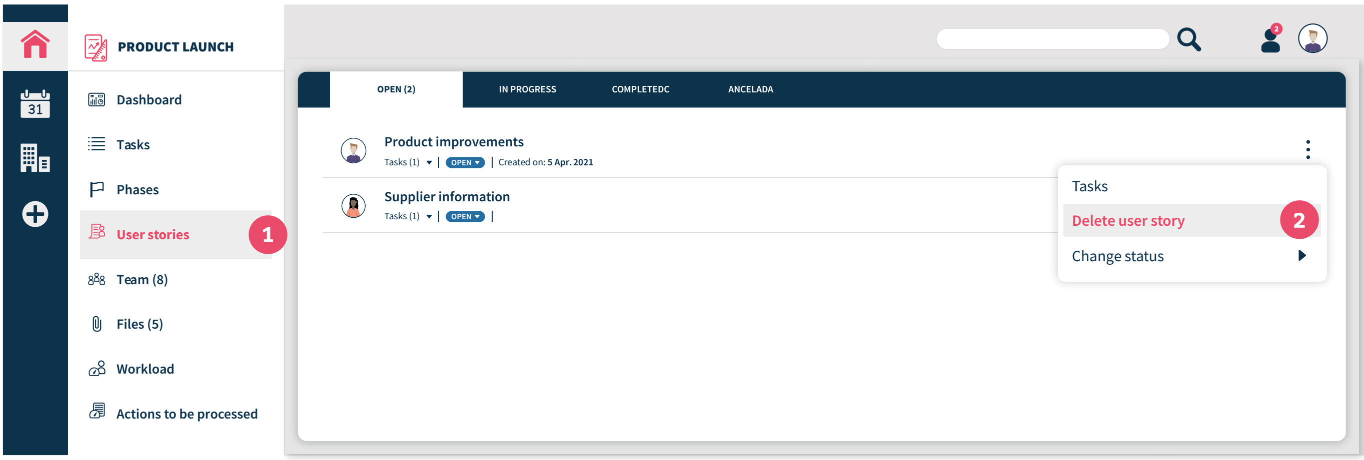


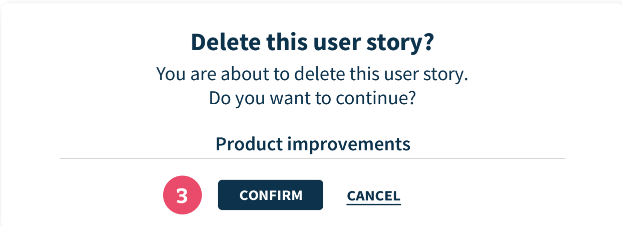
3. Enter a name for the user story.
4. Enter the content of the user story.
5. Click on «*SAVE*»



4.5.4.2 Delete a user story

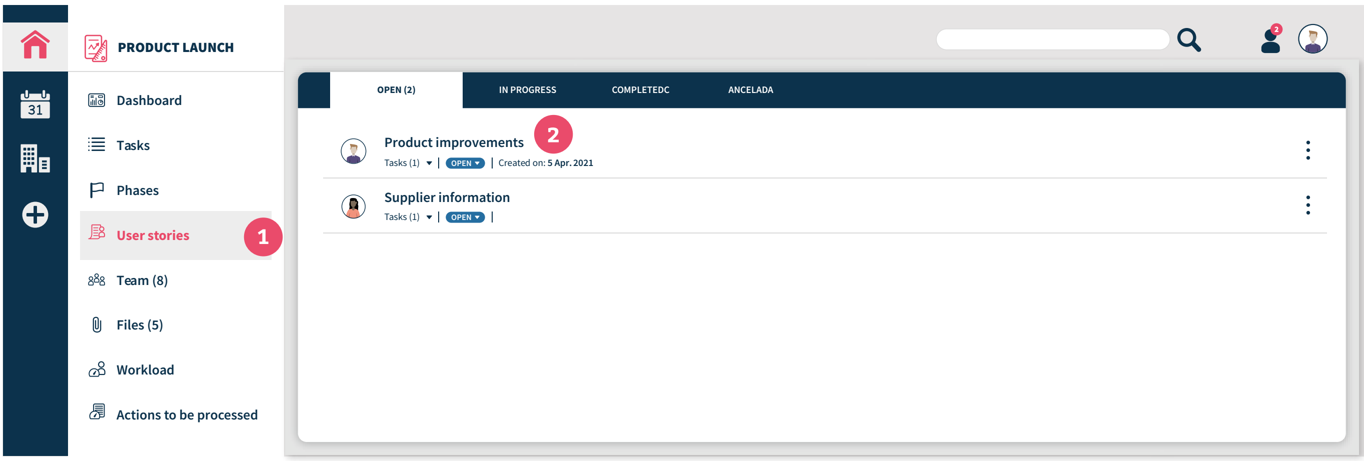
1. Click on the «*User stories*» option on the project features menu.
2. Click on the «*Three dots*» button on the right side of your screen on the user story line, then click on «*Delete*»
3. Click on «*CONFIRM*»





4.5.4.3 Modifier un rapport collaboratif

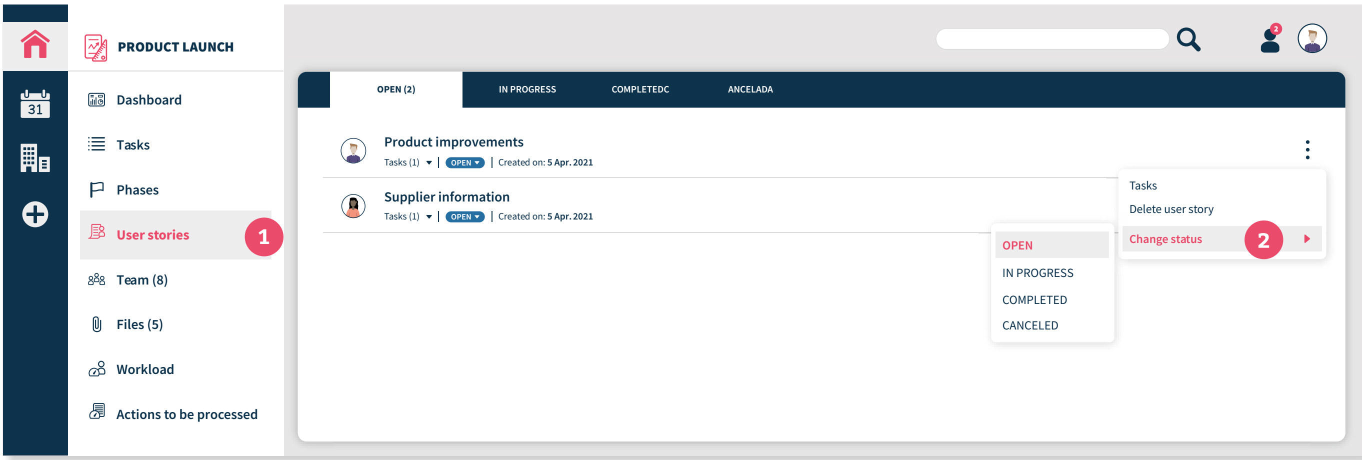
1. Click on the «*User stories*» option on the project features menu.
2. Click on the desired user story. A pop-up window will open.



3. Click on the «*Modify* » button on the top left of the window that appears.

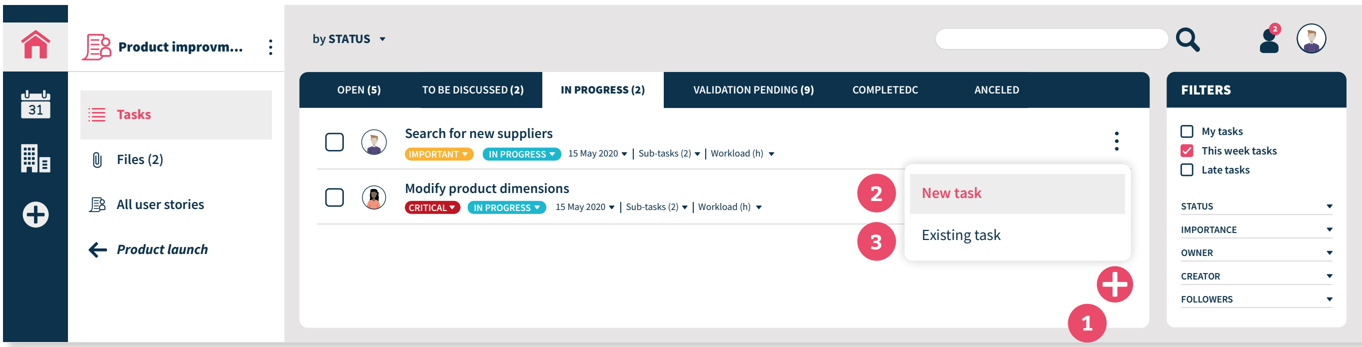
4.5.4.4 Modify the progress status of a user story

1. Click on the «*User stories*» option on the project features menu.
2. Click on the «*Three dots*» button on the right side of your screen on the user story line, then click on «*Change status*» option on the drop-down menu and select the desired status.



4.5.4.5 Attach a task to a user story

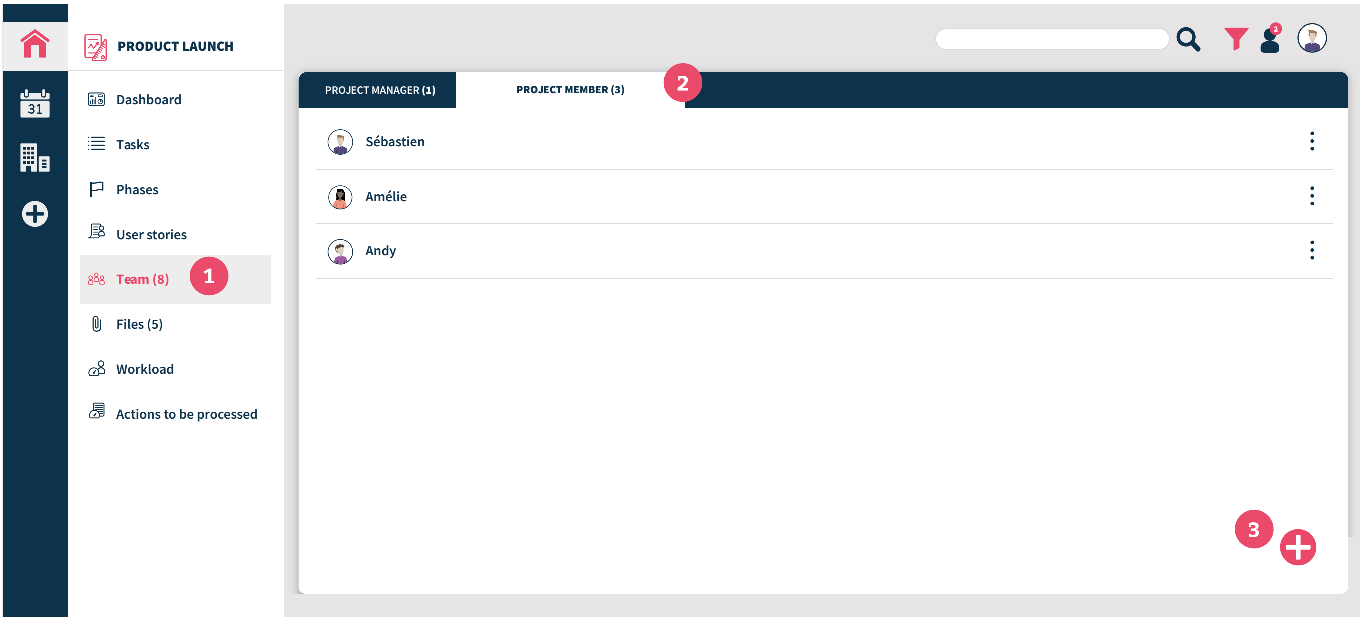
1. Click on the «+» button at the bottom right of the screen.
2. Click on «*New task*» to create a new task to be added to the user story. This task will also be visible from «*Project*», «*Departement* » and «*All tasks*» views.
3. Click on «*Existing task*» to attach an existing task to the user story.



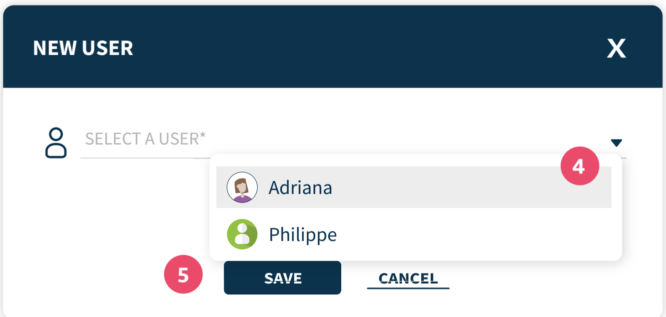
4.5.5 Team

4.5.5.1 Add a user to a project

1. Click on the «*Team*» option on the project features menu.
2. Select the tab of the role you want to assign to the user.
3. Click on the «+» button at the bottom right of the screen.

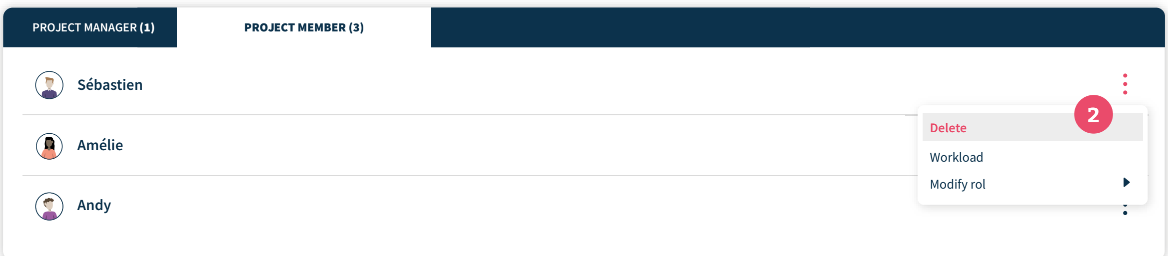


4. Click on the drop-down menu, then select the desired user.
5. Click on «*SAVE*»



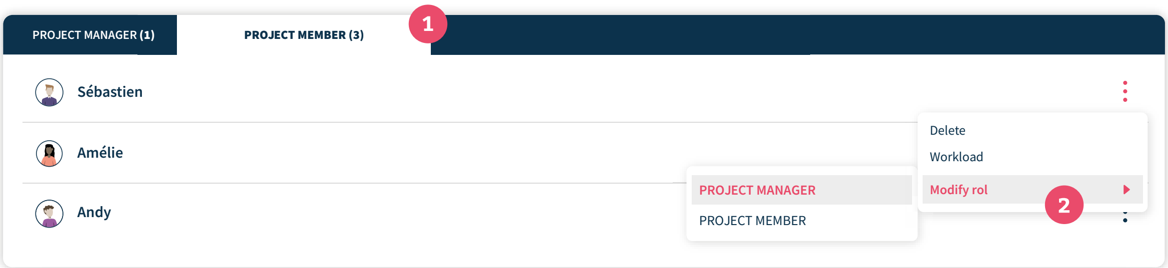
4.5.5.2 Delete a user from a project

1. Click on the «*Team*» option on the project features menu.
2. Click on the «*Three dots*» button on the right side of your screen on the user's line, then click on «*Delete*»



4.5.5.3 Modify the user role

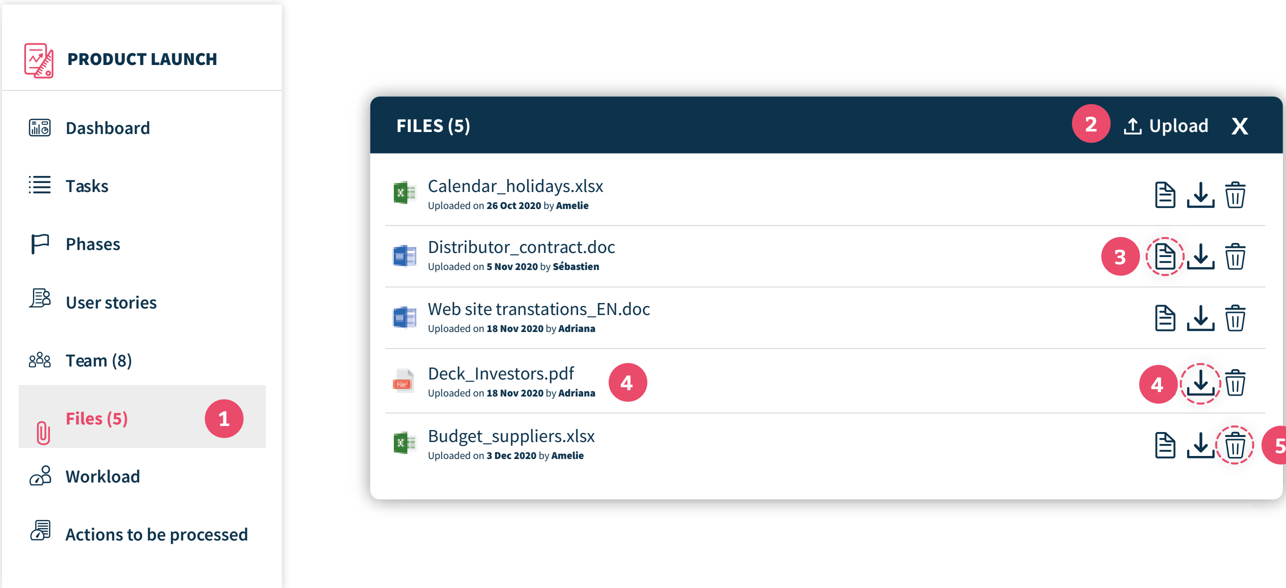
1. Click on the user's role tab.
2. Click on the «*Three dots*» button on the right side of your screen on the user's line, then click on «*Change role*» option on the drop-down menu and select the desired role.



4.5.6 Files

4.5.6.1 Import, view, download and delete files in a project

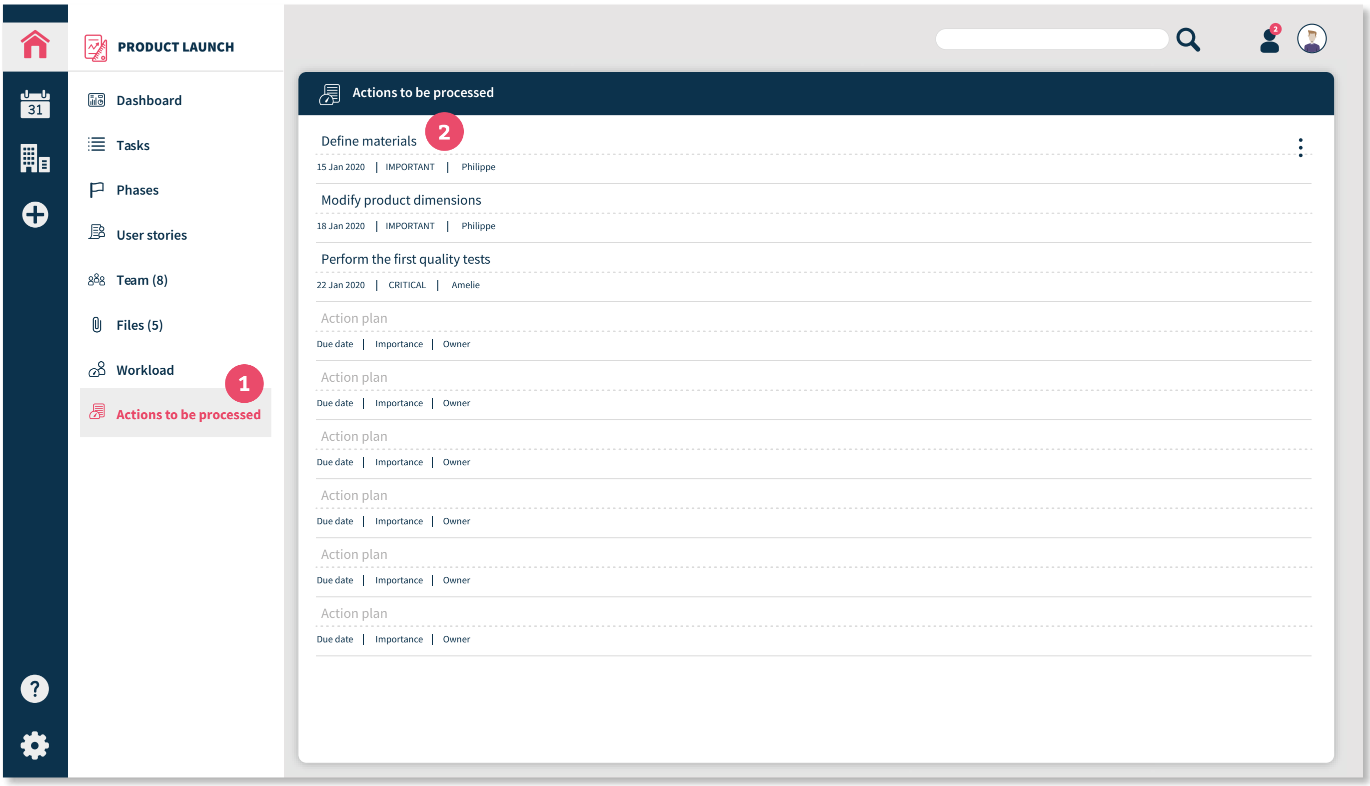
1. Click on the «*Files*» option on the project features menu.
2. Click on the «*Upload*» button to add the desired file.
3. Click on the «*file*» icon to preview the uploaded file.
4. Click on the desired file or on the «*download*» icon to download it.
5. Click on the «*trash can*» icon to delete the uploaded document.



4.5.7 Actions to be processed

1. Click on the «*Actions to be processed*» option on the project features menu.
2. Enter the task name on the field.

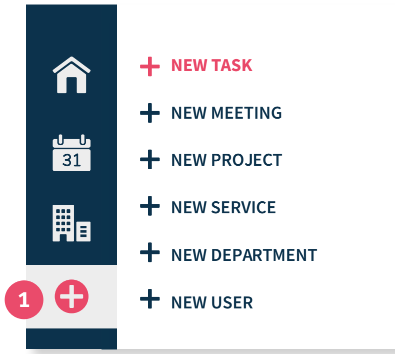
** The actions to be processed will only appear in the task list once the deadline, the criticality and the person responsible have been notified.*



5 Task management

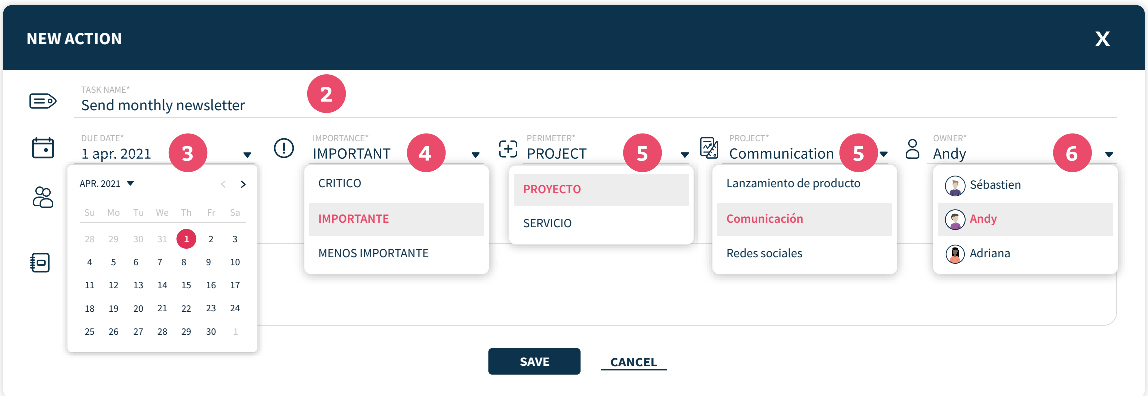
5.1 Add a task

5.1.1 Add a task from the «ADD +» button



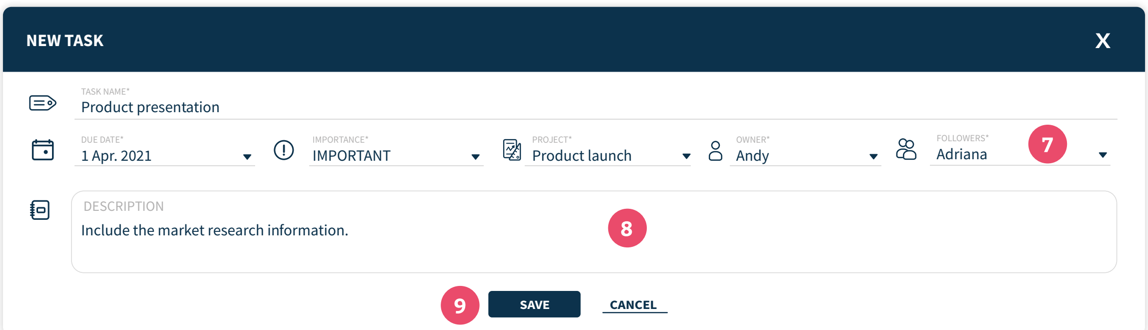
1 Click on the *«ADD»* button on the left sidebar of your screen, then click on *«NEW TASK»* option.

2 Enter the task name.
3 Enter the task due date (by default today plus seven days).
4 Enter the task importance (by default «IMPORTANT»).
5 Enter the task primeter.
6 Enter the task owner.



7 Enter the task followers (optional).
8 Enter the task description (optional).
9 Click on *«SAVE»*

** The task owner and followers will be notified.*



5.1.2 Add a task from a meeting

- In the «*Meetings management*» module, see the paragraph *«Adding a task to a meeting» (p. 53)*

5.1.3 Add a task from a department

- In the «*Projects management*» module, see the paragraph *«Tasks» (p. 25)*
  ** To add a task within a department, follow the same steps as within a project.*

5.1.4 Add a task from a project

- In the «*Projects management*» module, see the paragraph *«Tasks» (p. 25)*

5.1.5 Add a task from a project phase

- In the «*Projects management*» module, see the paragraph *«Add a task to a phase» (p. 28)*

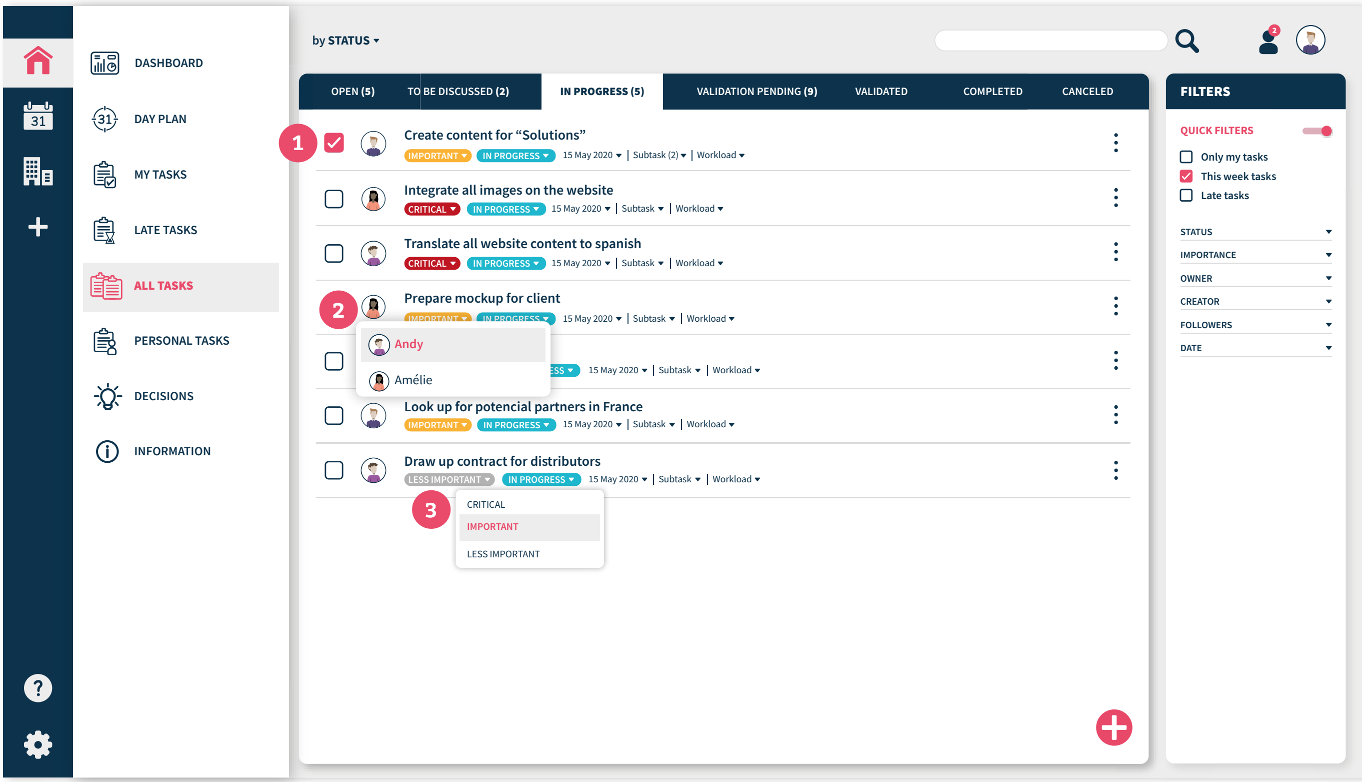
5.1.6 Add a task from a user story

- In the «*Projects management*» module, see the paragraph *«Add a task to a user story» (p. 31)*

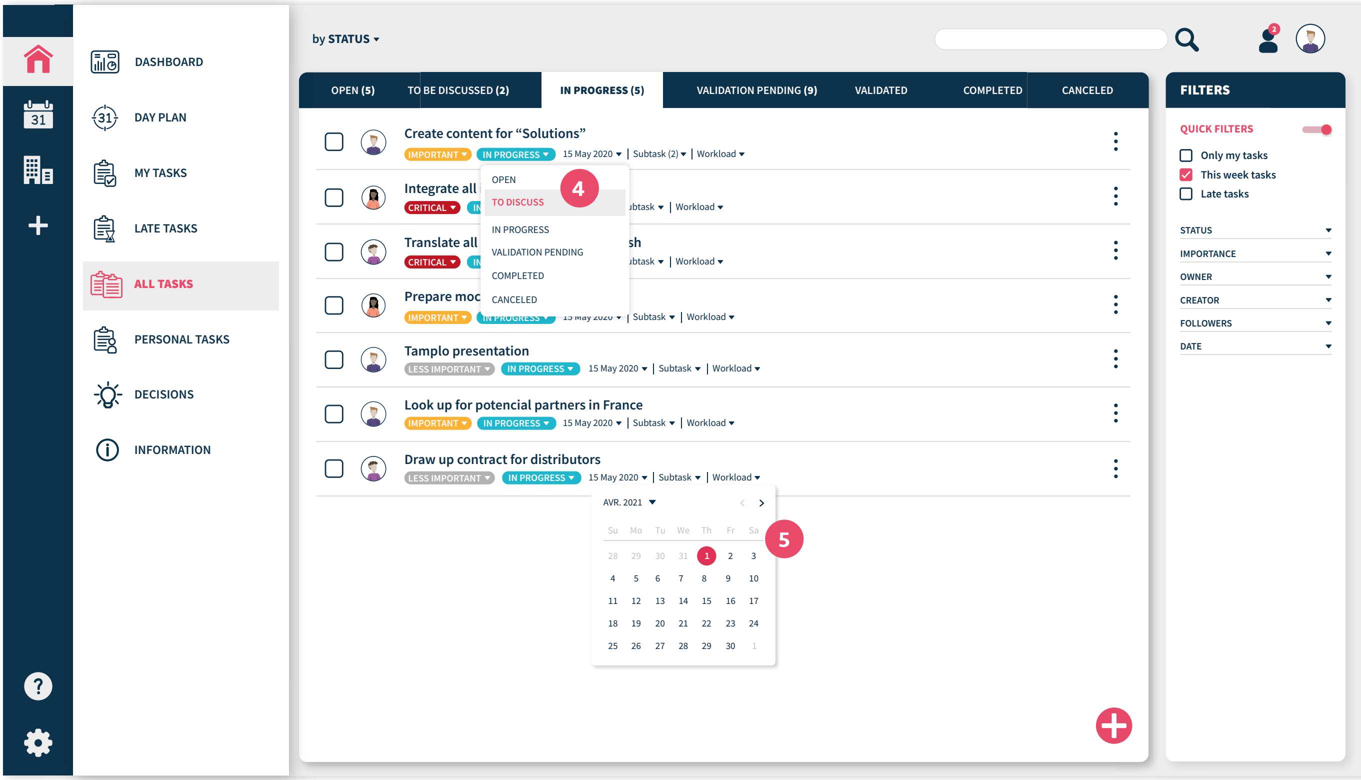
5.2 Modify a task

5.2.1 Modify a task from a tasks list

1. Close a task by checking the box to the left of the task owner photo.
2. Change the task owner by clicking on the current task owner photo, then select a new task owner.
3. Modify the task importance by clicking on the current importance, then click on the new desired one.



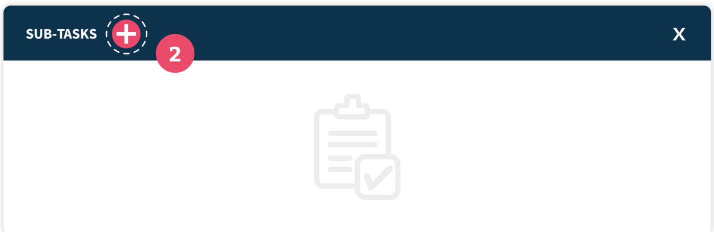
4. Modify the progress status of a task by clicking on the current status, then select the desired new one.
5. Modify the task due date by clicking on the current date, then select a diferent one.



5.2.1.1 Add a subtask

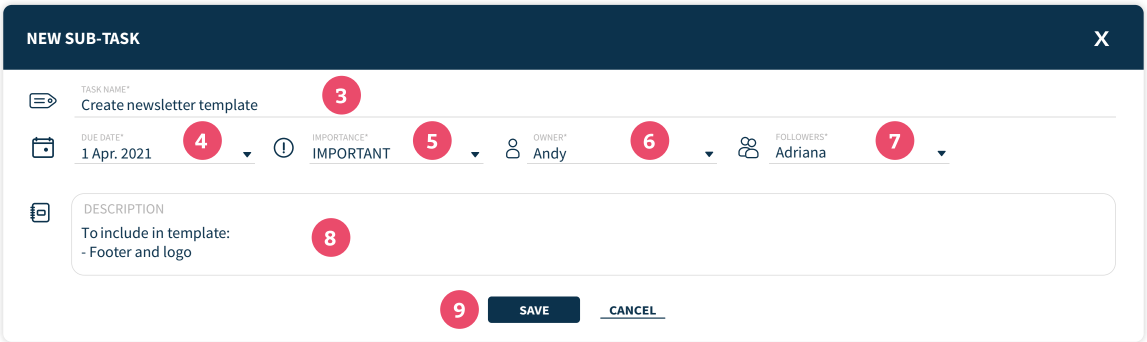
1. Click on «*Subtask*» from a task on your task list.

2. Click on the « + » on top left of the window.



3. Enter the subtask name.
4. Enter the subtask due date (by default today plus seven days). The subtask due date cannot be later than the task due date.
5. Enter the subtask importance (by default «IMPORTANT»).
6. Enter the subtask owner (by default the same one on the task) .
7. Enter the subtask followers (optional).
8. Enter the subtask description (optional).
9. Click on «*SAVE*».

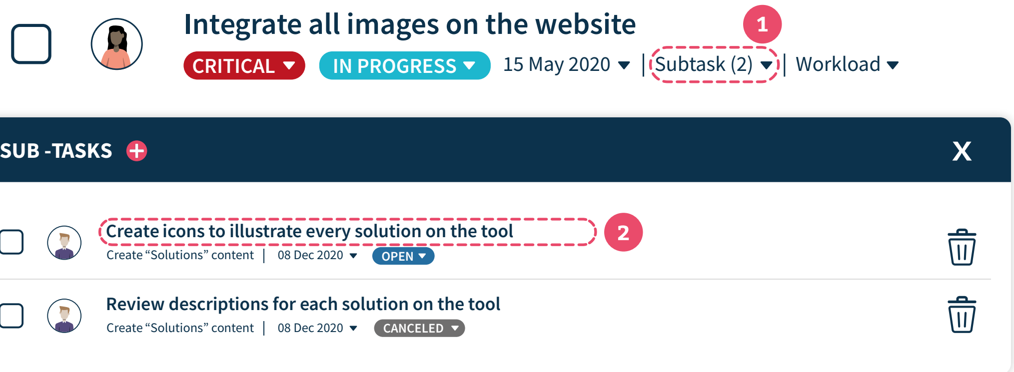
** The subtask owner and followers will be notified.*



5.2.1.2 Modify a subtask

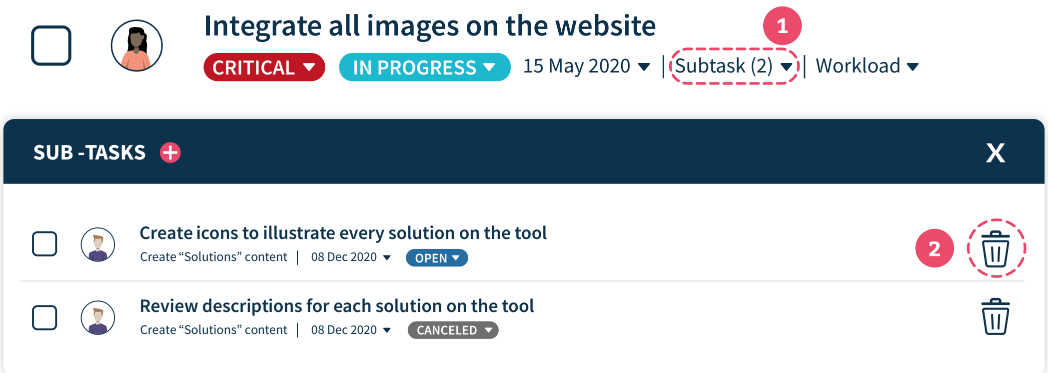
1. Click on «*Subtask*» from a task on your task list.
2. Click on the subtask name.

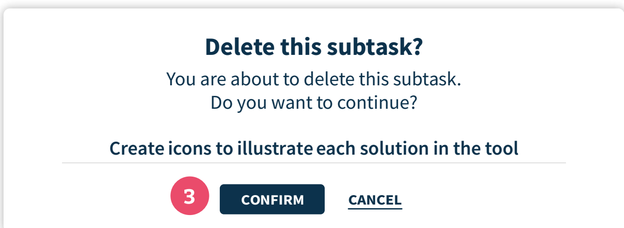
** A subtask is modified in the same way as a task.*



5.2.1.3 Delete a subtask

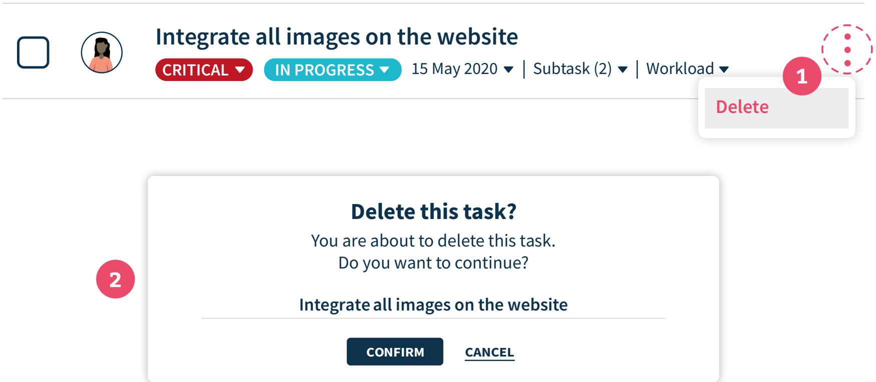
1. Click on «*Subtask*» from a task on your task list.
2. Click on the «*Delete*» button on the right side of the screen on the subtask line.
3. Cliquer sur «*CONFIRM*»





5.2.1.4 Delete a task from a task list

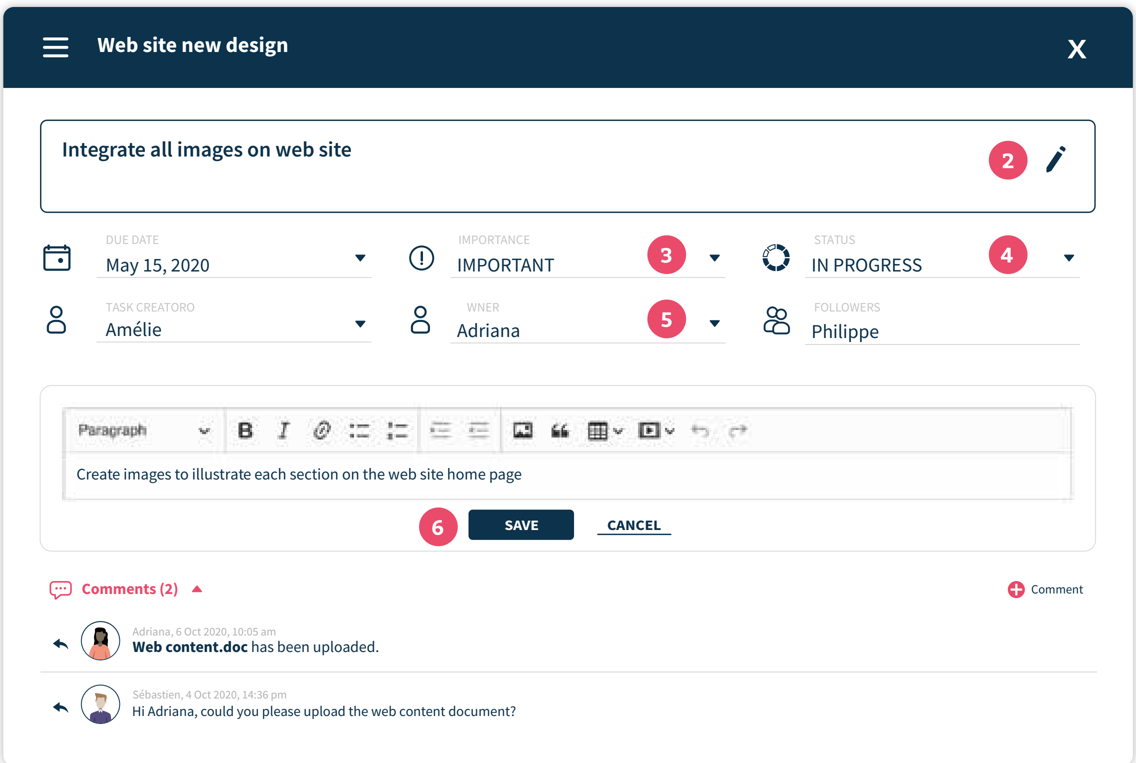
1. Click on the *«Three dots»* button on the right side of your screen on the task line, then click on *«Delete»*
2. Click on *«CONFIRM»* **The task owner and followers will be notified.*



5.2.2 Modify a task from a task window

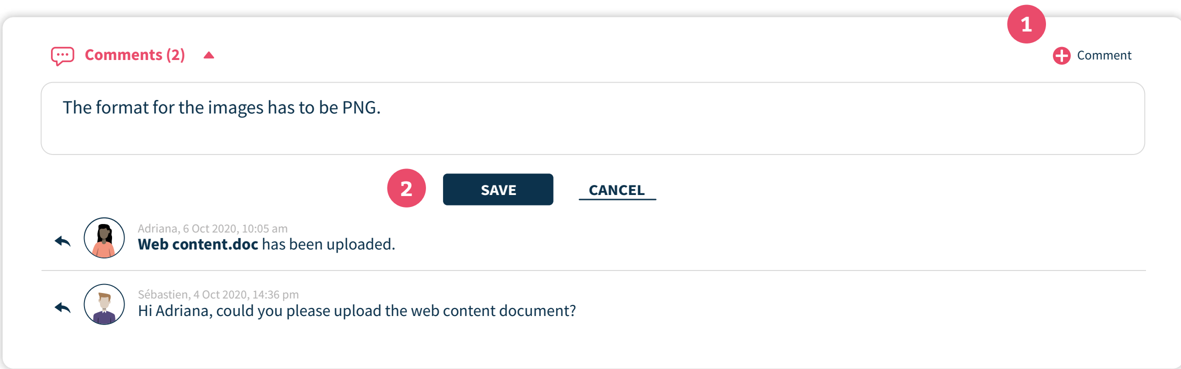
1. Click on the task title to display the task window.

2. Modify the task name by clicking the *«Modify»* button on the right side of the title box, then click on *«SAVE»*
3. Modify the task importance by clicking on the *«Importance»* field, then selecting the new importance.
4. Modify the progress status of the task by clicking on the *«Status»* field, then selecting the new status.
5. Modify the task owner by clicking on the *«Owner»* field, then selecting a new owner.
6. Modify the task description by clicking on the *«Modify»* button on the right side of the description box, then click on *«SAVE» (It is possible to add images, videos, boards, links and to give a format to the content of the description with the options displayed on the top banner).*



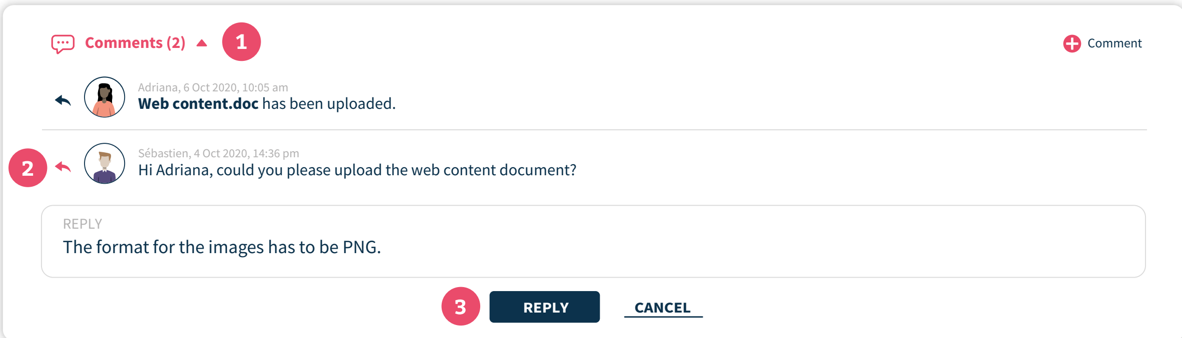
5.2.2.1 Add a comment

1. Click on the *«+ Comment»* button on the right side of the screen.
2. Enter the comment on the text box that will appear, then click on *«SAVE»*



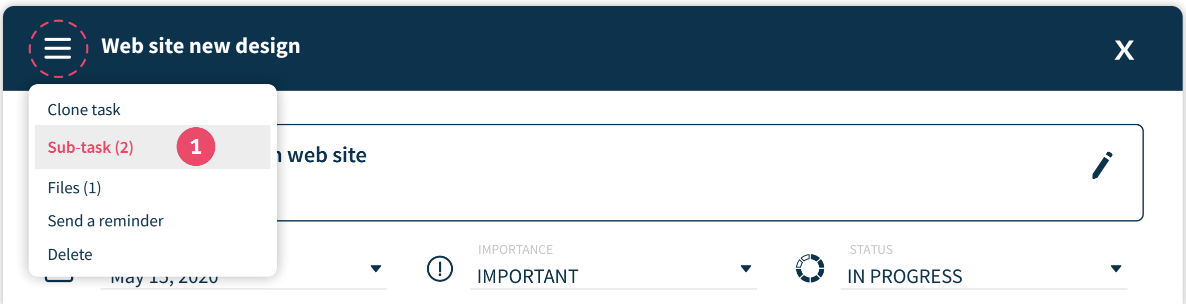
5.2.2.2 Reply to a comment

1. Click on the *«Comments»* tab to display all comments.
2. Click on the *«Reply»* button on the left side of the user photo and comment you want to respond.
3. Enter the response and click on *«REPLY»*



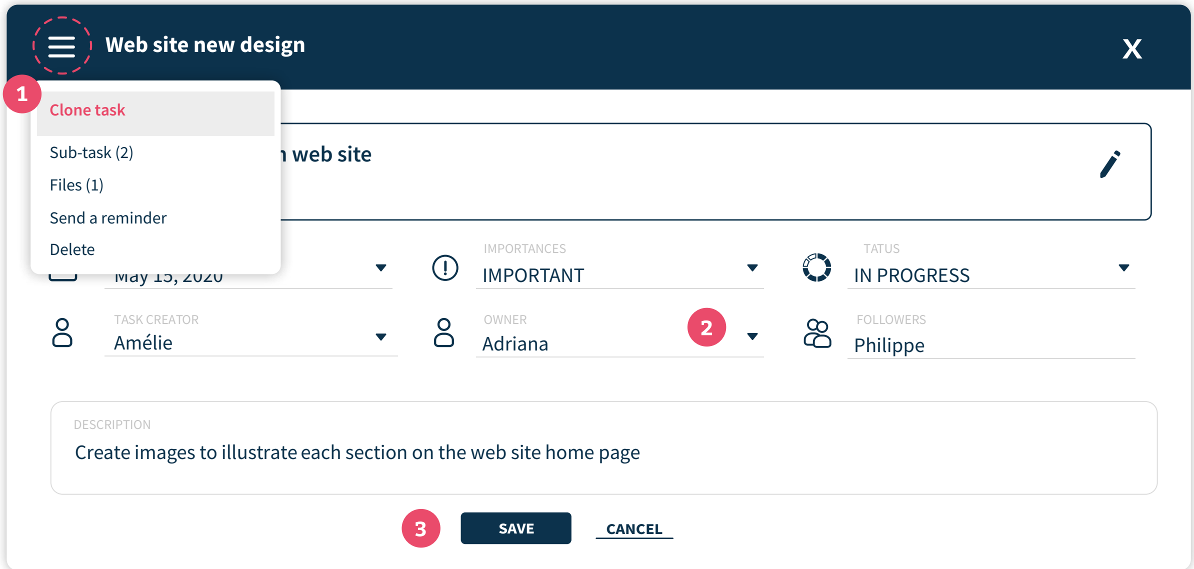
5.2.2.3 Add, modify or delete a subtask

1. Click on the "Burger Menu" on top left of the task window, then click on *«Subtasks»*
   - To add, modify or delete a subtask, please refer to the paragraph: *«Modify a task from a task list» (Page 25)*



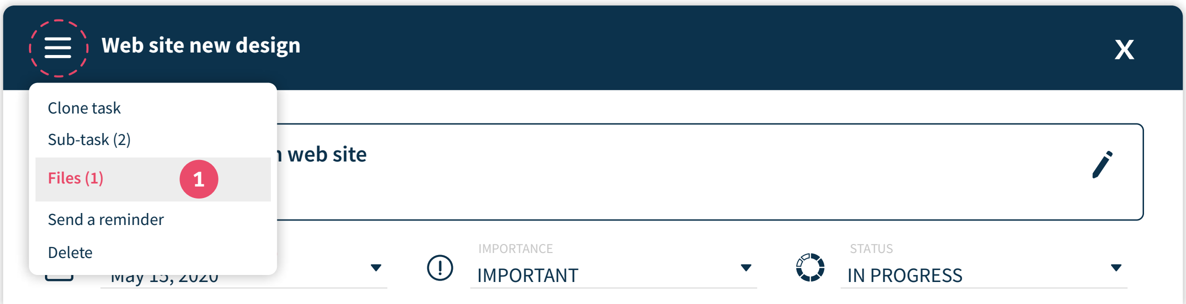
5.2.2.4 Clone a task

1. Click on the “Burger Menu” on top left of the task window, then click on «*Clone*»
2. Re-assign the task to a new owner.
3. Click on «*SAVE*»

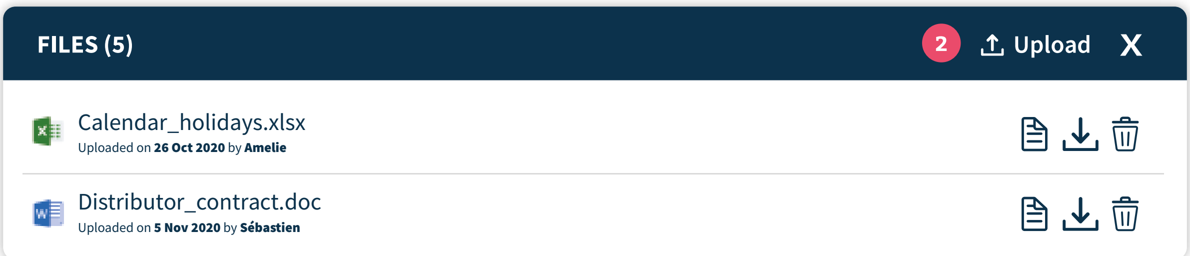


5.2.2.5 Add a file to a task

1. Click on the “Burger Menu” on top left of the task window, then click on «*Files*»

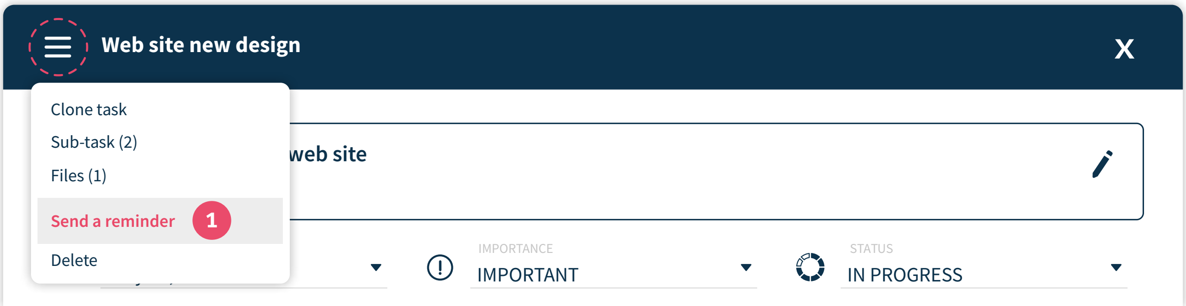


2. Click on the «*Upload*» button to add a file to the task.



5.2.2.6 Send a task reminder

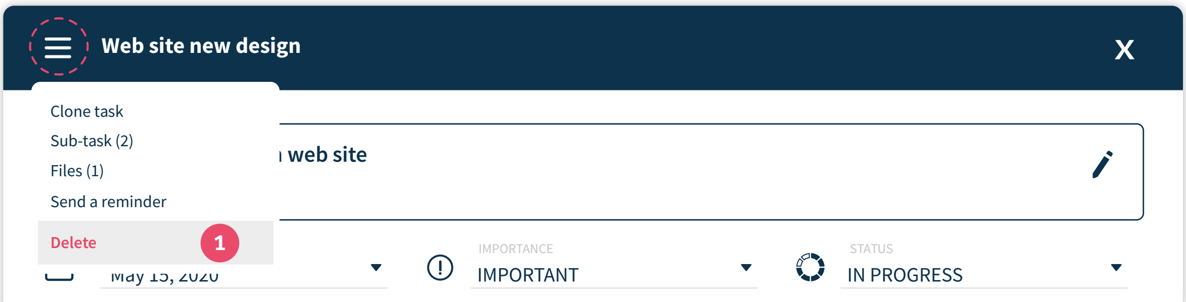
1. Click on the “Burger Menu” on top left of the task window, then click on «*Send a task reminder*»

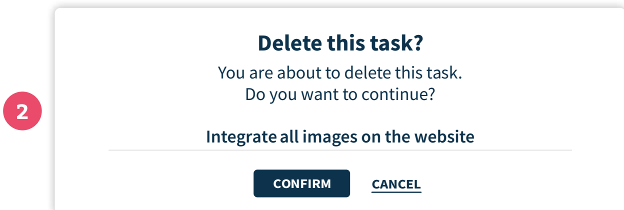


2. Select the task creator, owner or follower you want to send a reminder.
3. Click on «*Send*» button on top right of the window.

5.2.2.7 Delete a task from a task window

1. Click on the “Burger Menu” on top left of the task window, then click on «*Delete*»
2. Click on «*CONFIRM*»





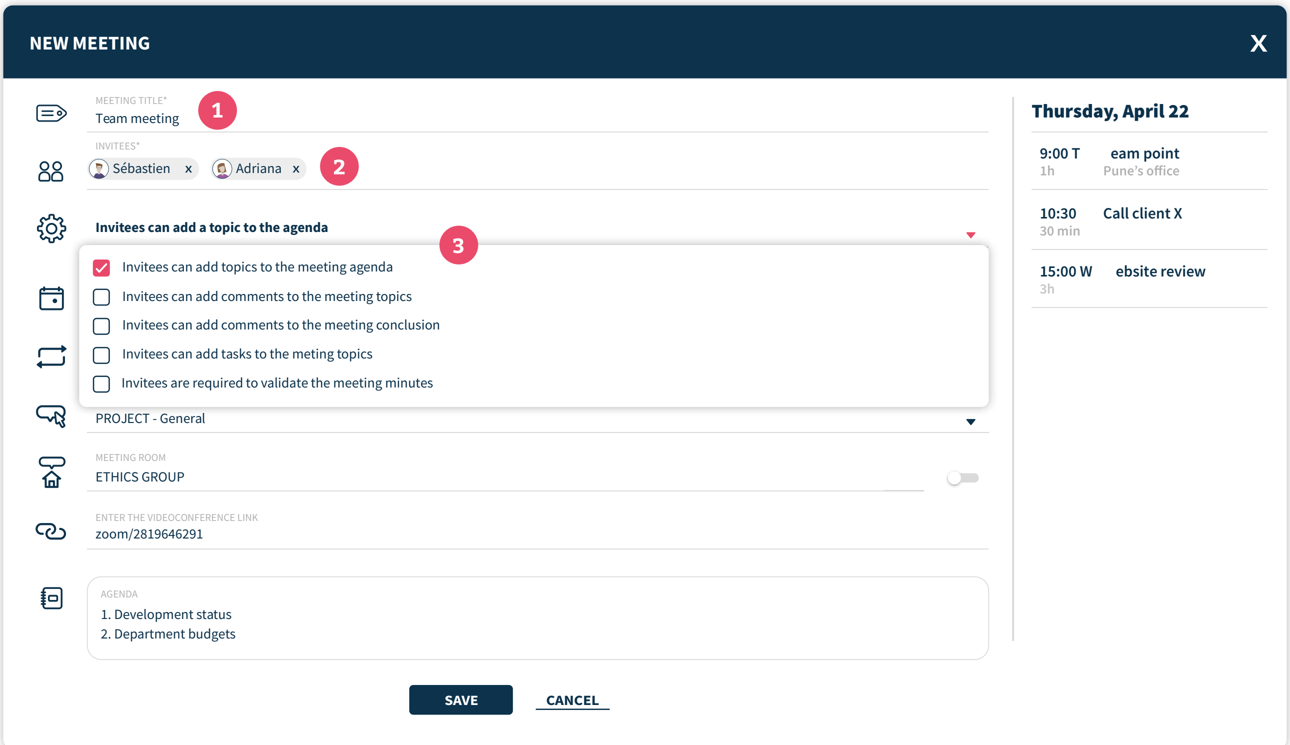
6 Meetings management

6.1 Add a meeting

1. Click on the «*ADD*» button on the left sidebar of your screen, then click on «*NEW MEETING*» option.

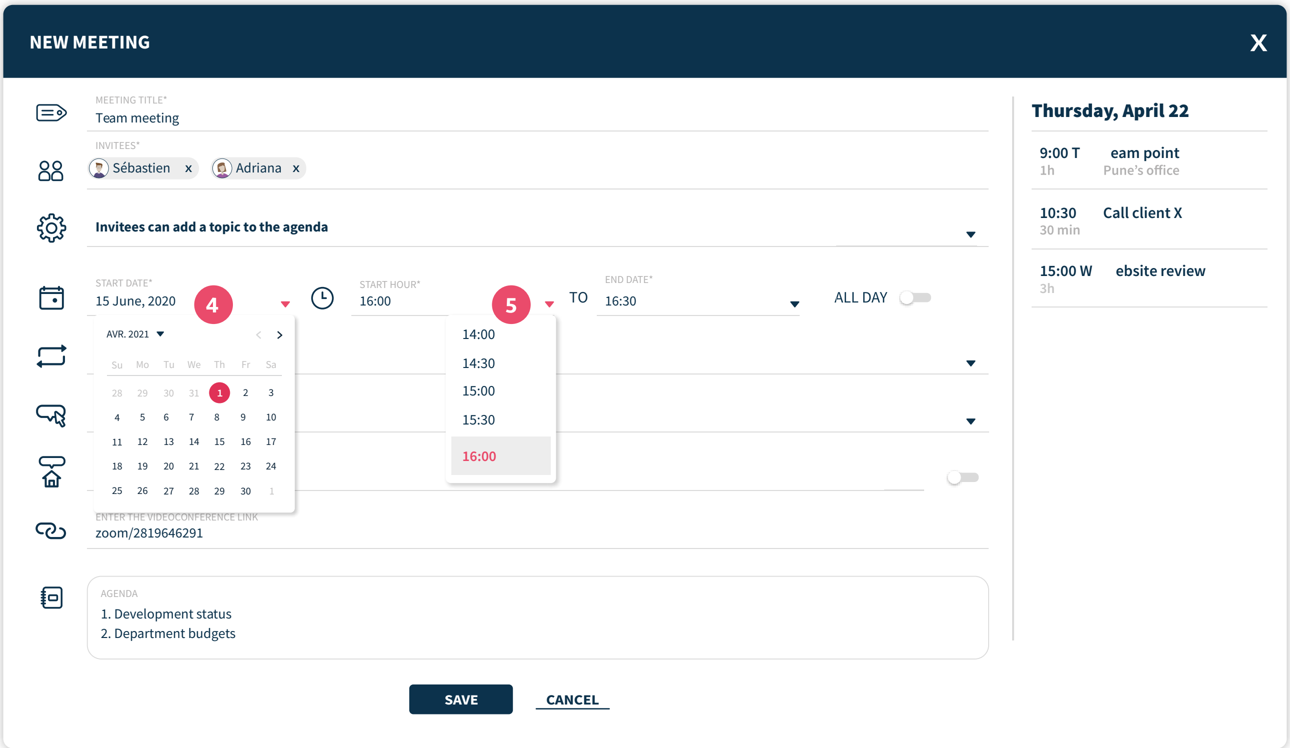
6.2 Information to enter to create a new meeting

1. Enter the meeting title.
2. Enter the meeting invitees by entering the first letters of their name that will automatically will display so you can select it.
3. Enter the invitees permissions:
   - Click on the "Gear icon" field to select or deselect the different permissions:
     - «***Invitees can add topics to the meeting agenda***» Check this option if you want your meeting to be collaborative and allow invitees to add topics to the agenda.
     - «***Invitees can add comments to the meeting topics***» Check this option if you want invitees to be able to add comments on the meeting topics added by others.
     - «***Invitees can comment on the meeting conclusion***» Check this option if you want invitees to be able to add comments on the meeting conclusion.
     - «***Invitees can add tasks to the meeting topics***» Check this option if you want invitees to be able to add tasks during the meeting.
     - «***Invitees are required to validate the meeting minutes***» Check this option if you want invitees to validate the minutes.

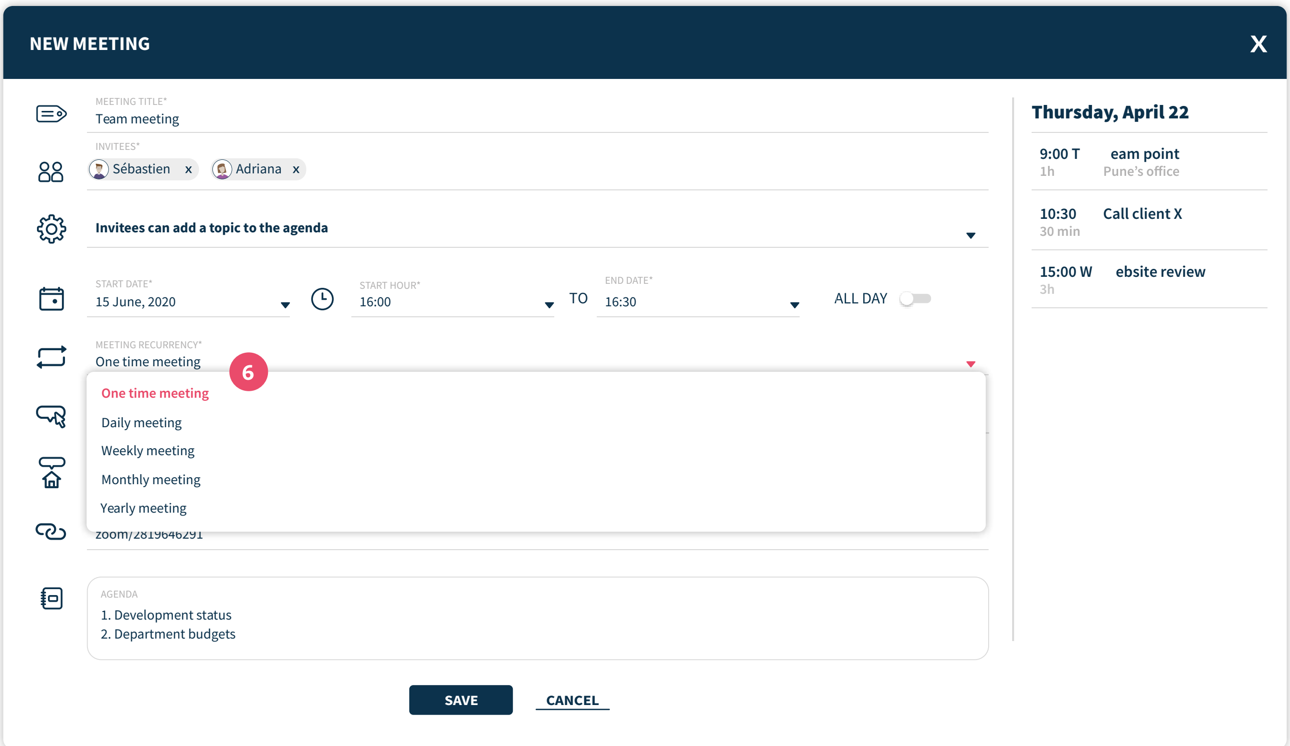


4 Enter the meeting start date (by default “today”).

5 Enter the meeting start and end time.

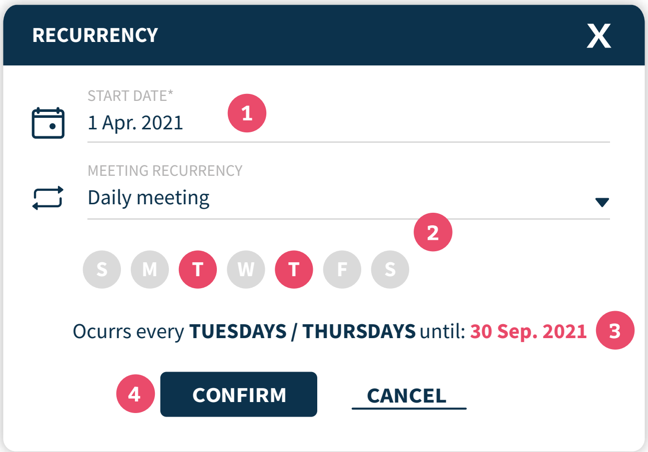


6 Enter the meeting recurrence (by default “One time meeting”)



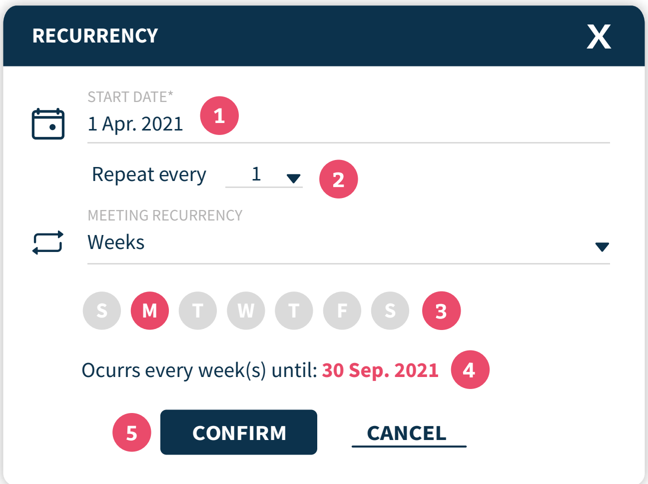
a. Select «Daily meeting» if you want your meeting to be repeated several times a week.

1. Select the meeting start date on the window that will open (by default “today”).
2. Select on which days of the week you want your meeting to take place.
3. Select the end date of the sequence.
4. Click on *«CONFIRM»*



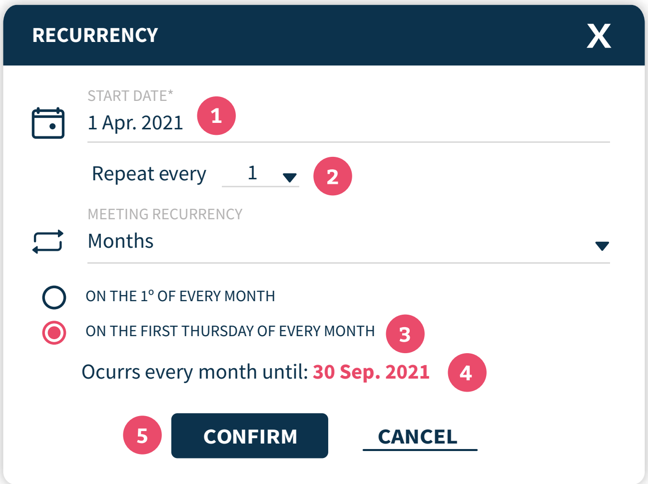
b. Select «Weekly meeting» if you want your meeting to be repeated every week.

1. Select the meeting start date on the window that will open (by default “today”).
2. Select the number of weeks between meetings.
3. Select on which day(s) of the week you want your meeting to take place.
4. Select the end date of the sequence.
5. Click on *«CONFIRM»*



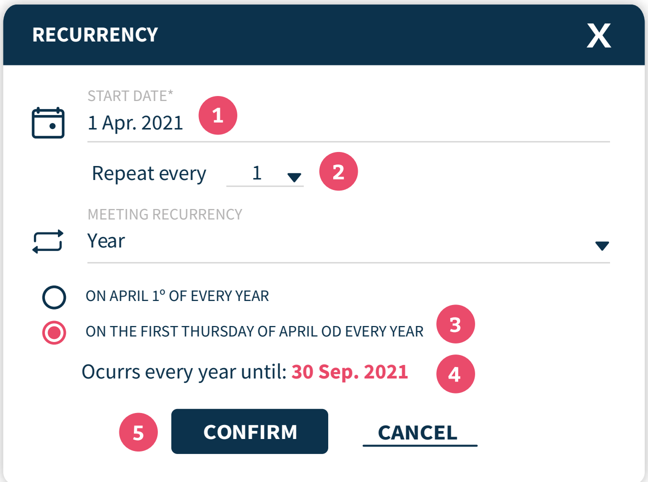
c. Select «Monthly meeting» if you want your meeting to be repeated every month.

1. Select the meeting start date on the window that will open (by default “today”).
2. Select the number of months between meetings.
3. Select the meeting day of the month (for examplo the 20th of every month or the third Tuesday of every month).
4. Select the end date of the sequence.
5. Click on *«CONFIRM»*

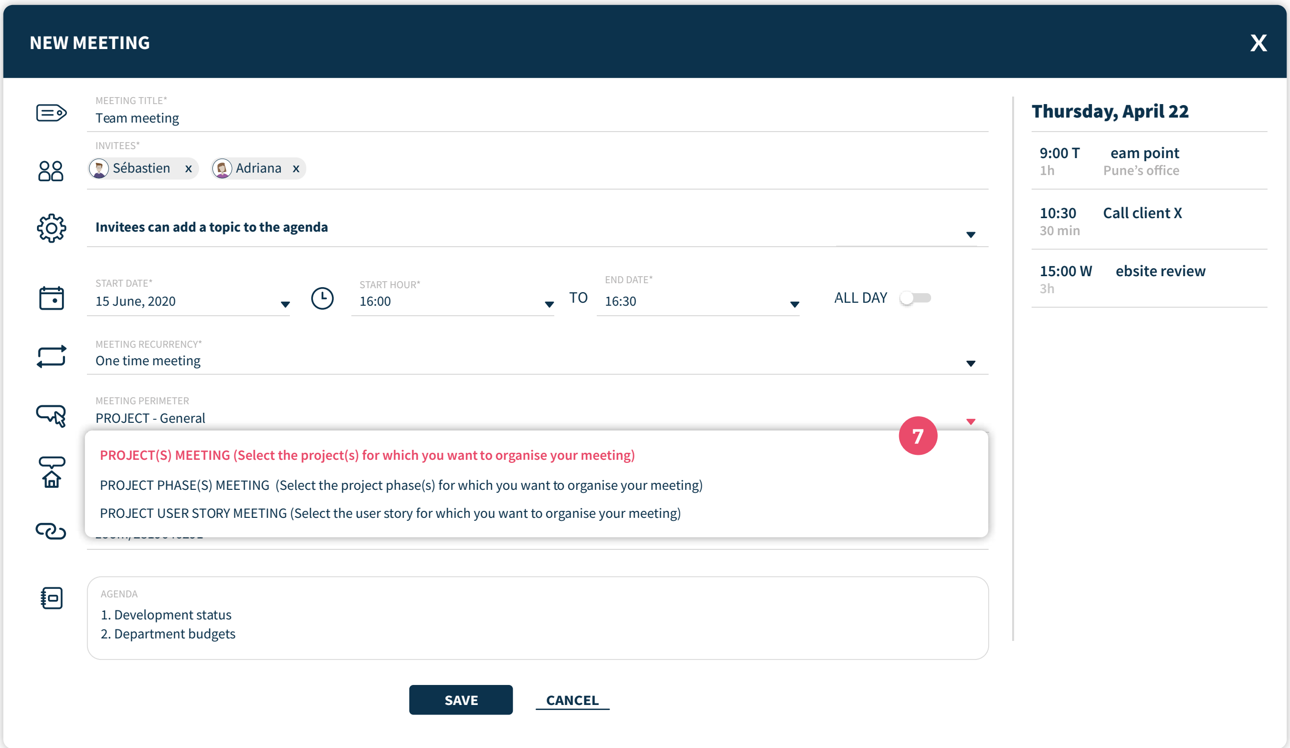


d. Select «Yearly meeting» if you want your meeting to be repeated every year.

1. Select the meeting start date on the window that will open (by default "today").
2. Select the number of years between meetings.
3. Select the meeting day during the year (for example on April 20 of every year, or the third Tuesday of April of every year).
4. Select the end date of the sequence.
5. Click on «*CONFIRM*»

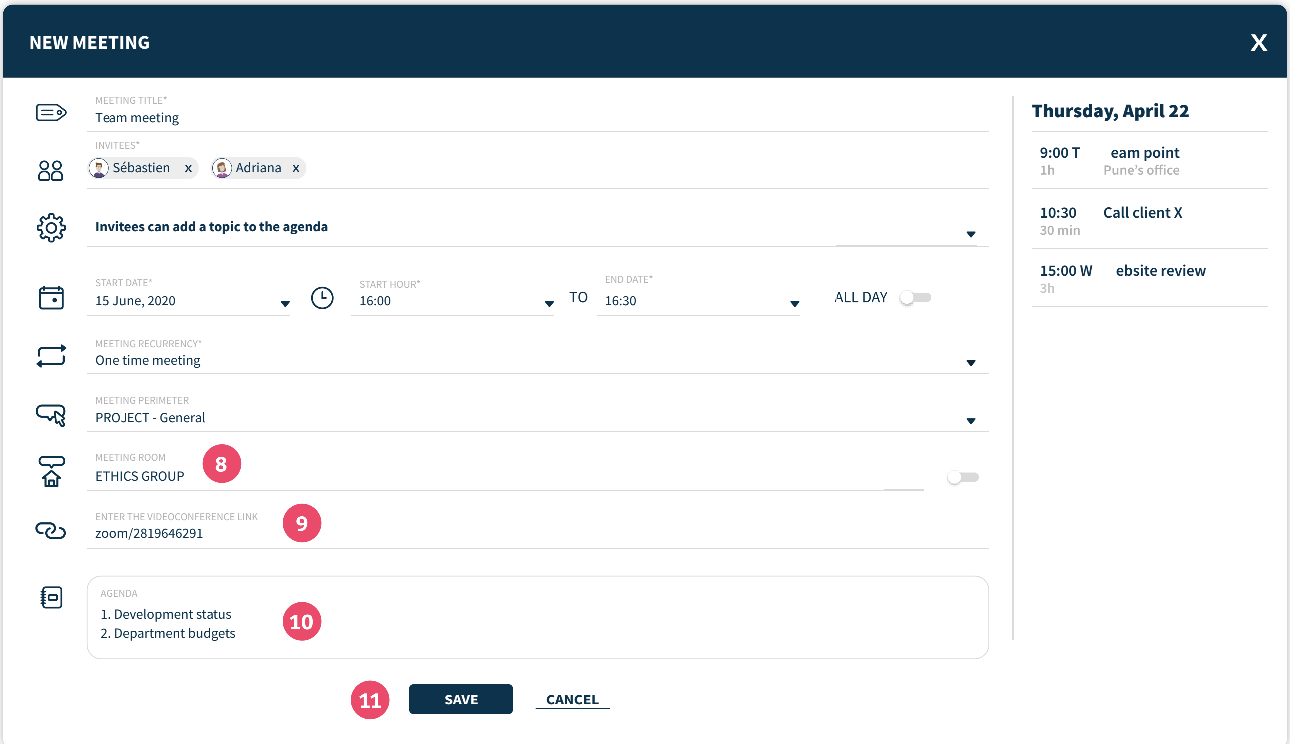


7. Enter the meeting perimeter:
    - Select «PROJECT MEETING» if you want your meeting to be about one or more projects.
    - Select «PROJECT PHASE MEETING» if you want your meeting to be about one or more project phases.
    - Select «PROJECT USER STORY MEETING» if you want your meeting to be about one or more project user stories.



8. Enter the meeting room (optional).
9. Enter the videoconference link (optional).
10. Enter the agenda (optional).
11. Click on «*SEND*»

** The invitees will recieve an invitation on their calendars.*

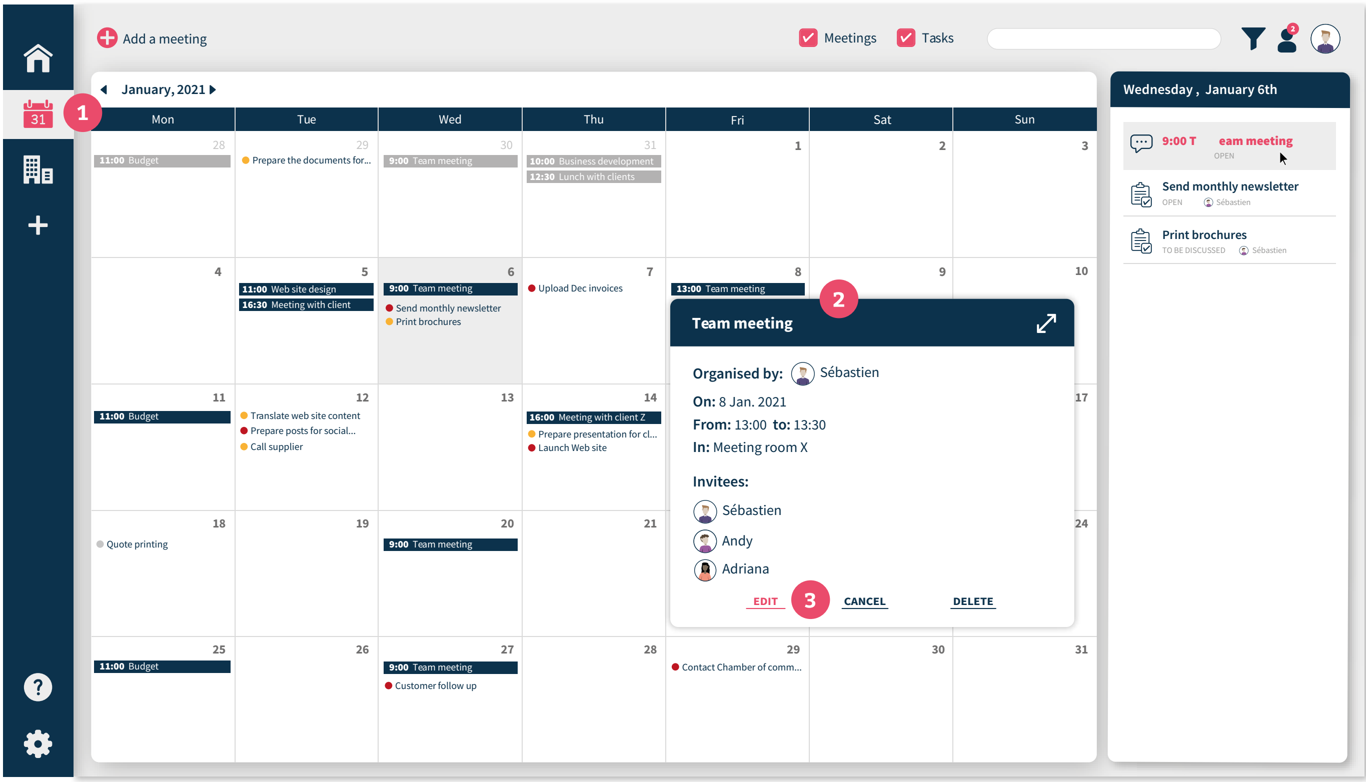


6.3 Edit a meeting

6.3.1 Edit a one time meeting

1. Click on the «*CALENDAR*» button on the left sidebar of your screen.
2. Select on the calendar the meeting you want to modify.
3. Click on «*EDIT*» on the bottom left of the window that opens.

** Once the modifications are made, click on «SEND»*

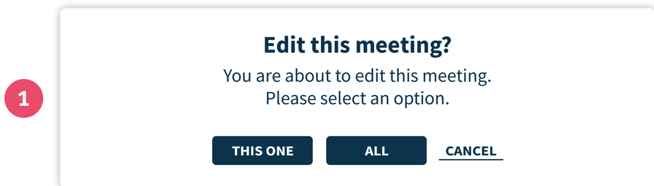


(Fig. 3)

6.3.1 Edit a recurring meeting

1. To modify a recurring meeting, please refer to the paragraph above «*Edit a one time meeting*» above. ***(Fig. 3)***
   - Click on «*This one*» option if you want to modify the selected meeting specifically.
   - Click on «*All*» option if you want to modify all of the recurring meetings.

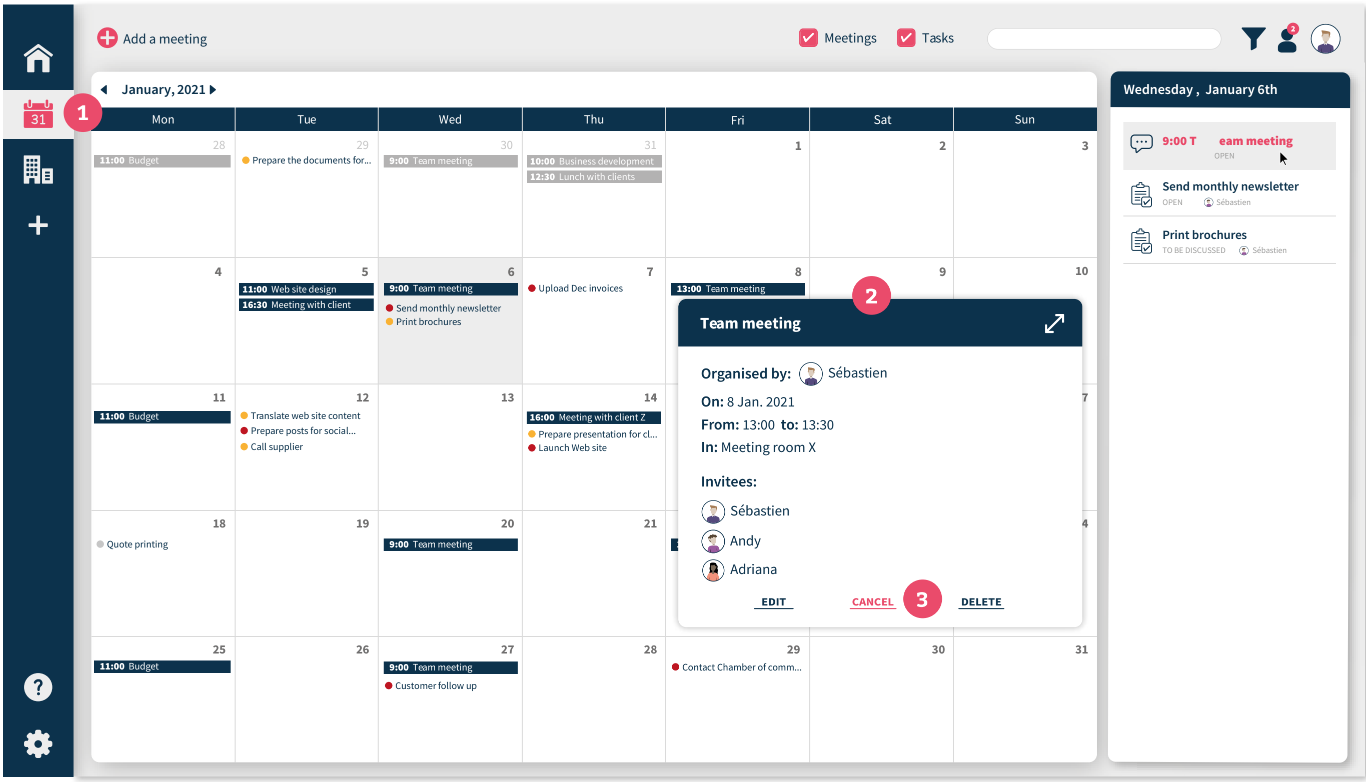
   ** Once the modifications are made, click on «SEND»*



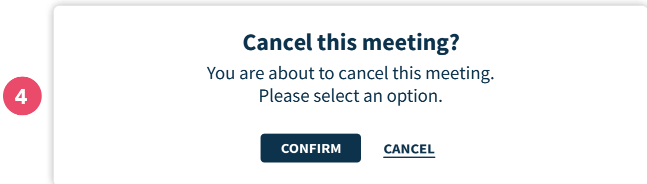
6.4 Cancel a meeting

6.4.1 Cancel a one time meeting

1. Click on the «*CALENDAR*» button on the left sidebar of your screen.
2. Select on the calendar the meeting you want to modify.
3. Click on the «*Cancel*» option .
4. Click on «*CONFIRM*» to cancel the meeting.

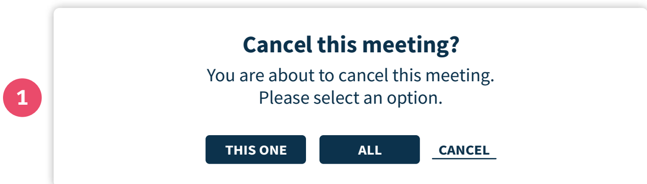


(Fig. 4)



6.4.2 Cancel a recurring meeting

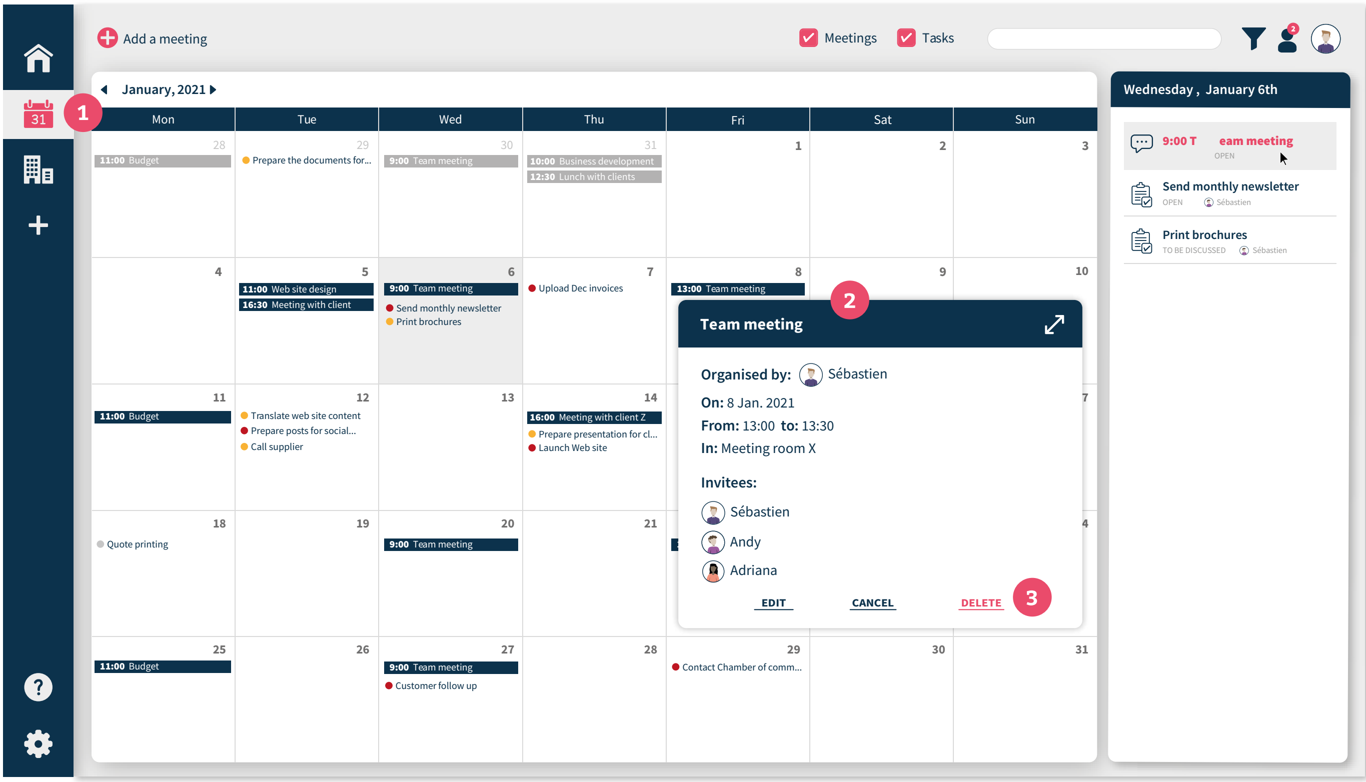
1. To cancel a recurring meeting, please refer to the paragraph above «*Cancel a one time meeting*» above. ***(Fig. 4)***
   - Click on «*This one*» if you want to cancel the selected meeting specifically.
   - Click on «*All*» if you want to cancel all of the recurring meetings.



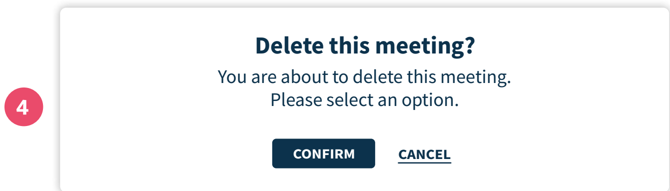
6.5 Delete a meeting

6.5.1 Delete a one time meeting

1. Click on the «*CALENDAR*» button on the left sidebar of your screen.
2. Select on the calendar the meeting you want to modify.
3. Click on the «*DELETE*» option .
4. Click on «*CONFIRM*» to cancel the meeting.

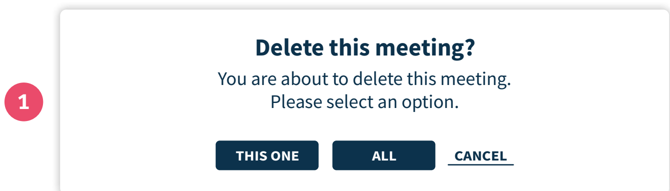


(Fig. 5)



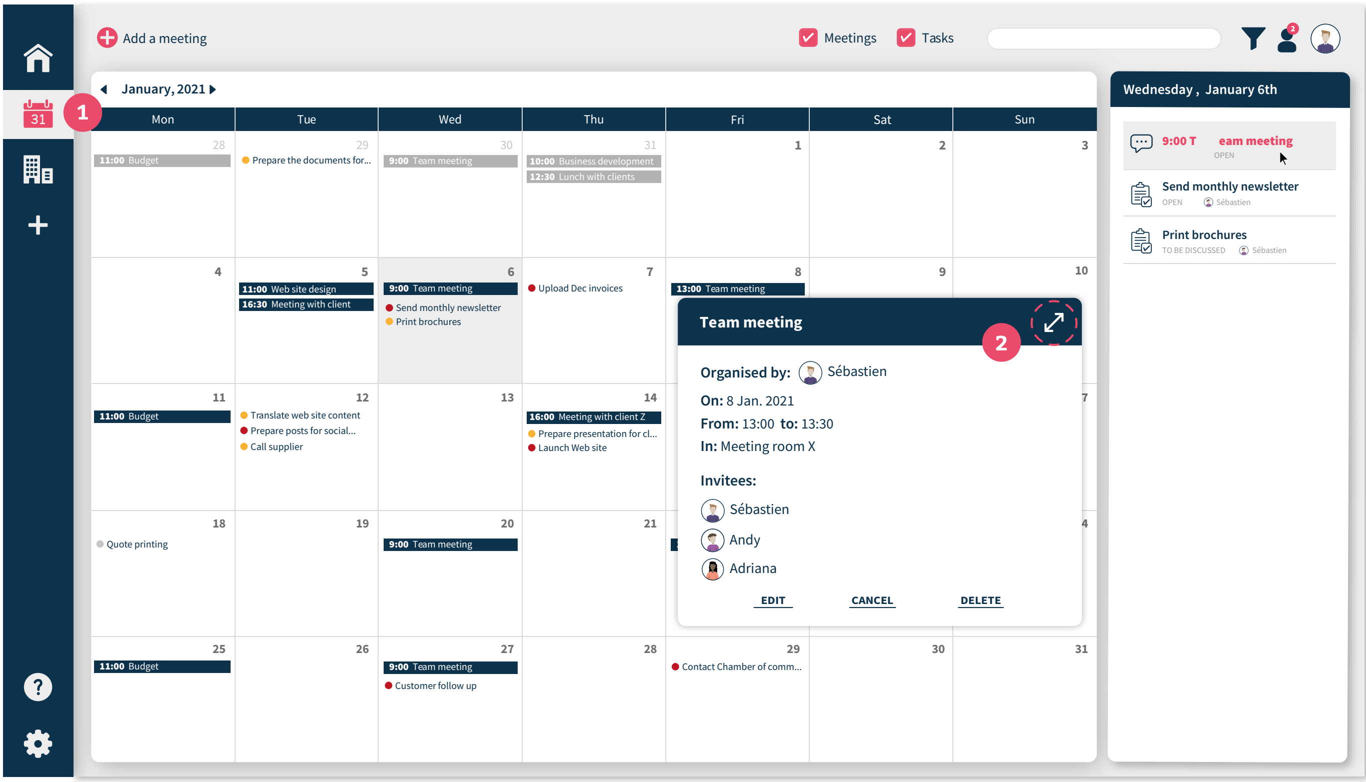
6.5.2 Delete a recurring meeting

1. To delete a recurring meeting, please refer to the paragraph above «***Delete a one time meeting***» above. ***(Fig. 5)***
   - Click on «*This one*» if you want to delete the selected meeting specifically.
   - Click on «*All*» if you want to delete all of the recurring meetings.



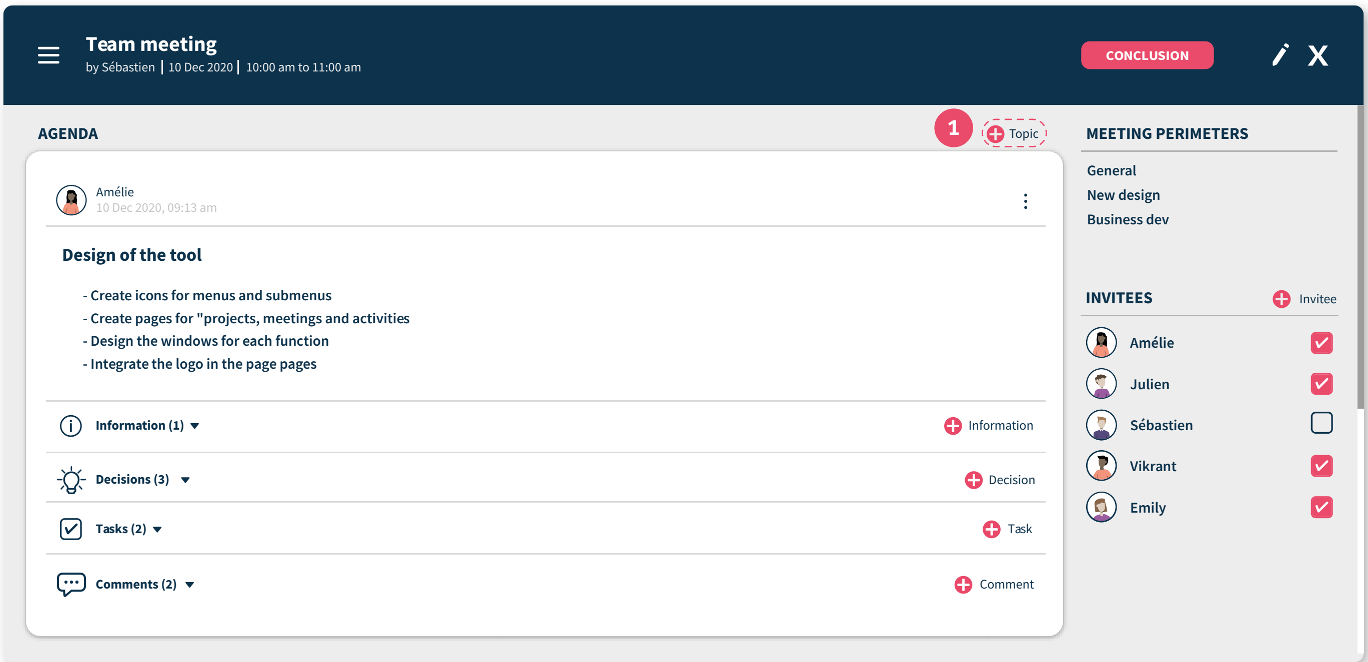
6.6 Conduct a meeting

1. Click on the «*CALENDAR*» button on the left sidebar of your screen.
2. Select on the calendar the meeting you want conduct, then click on the “arrow” icon on top right of the window to open the meeting page.

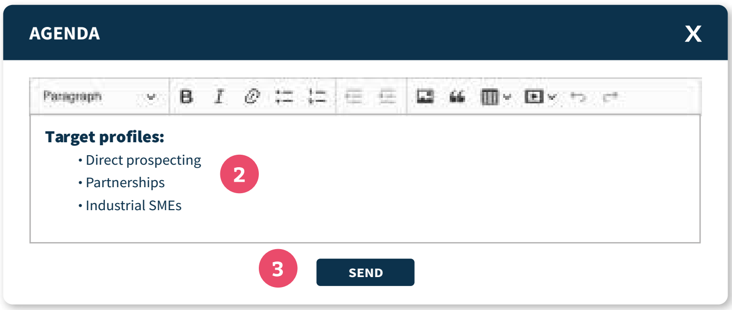


6.6.1 Add an agenda to the meeting

1. Click on the «*+ Topic*» on top right of the window.

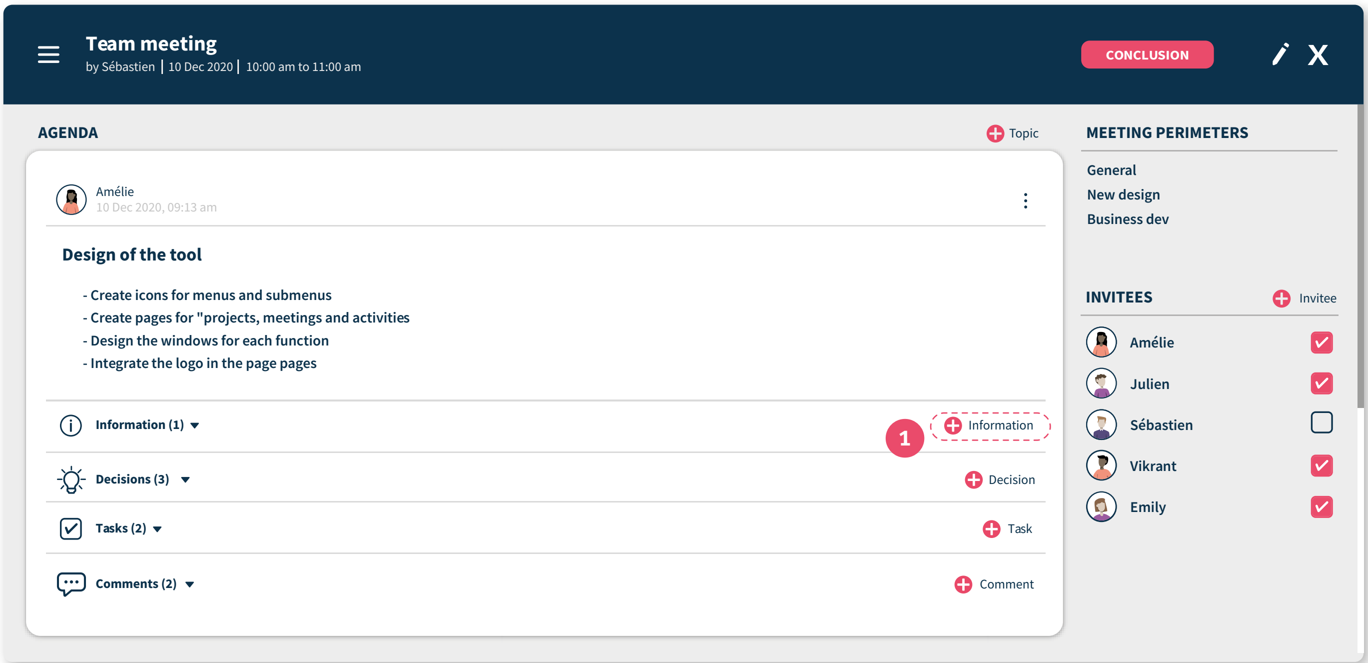


2. Enter the topic.
3. Click on «*SEND*»

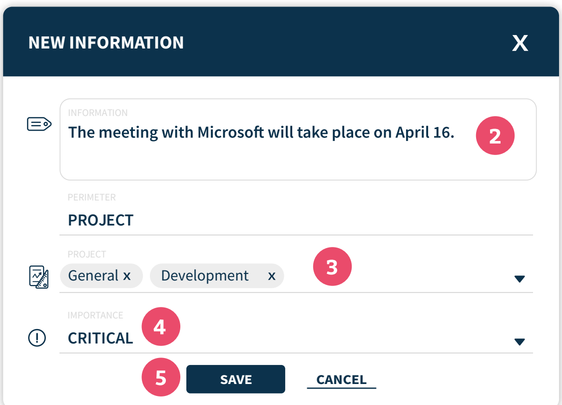


6.6.2 Add information to the meeting

1. Click on «*+ Information*» on the right side of the topic box.

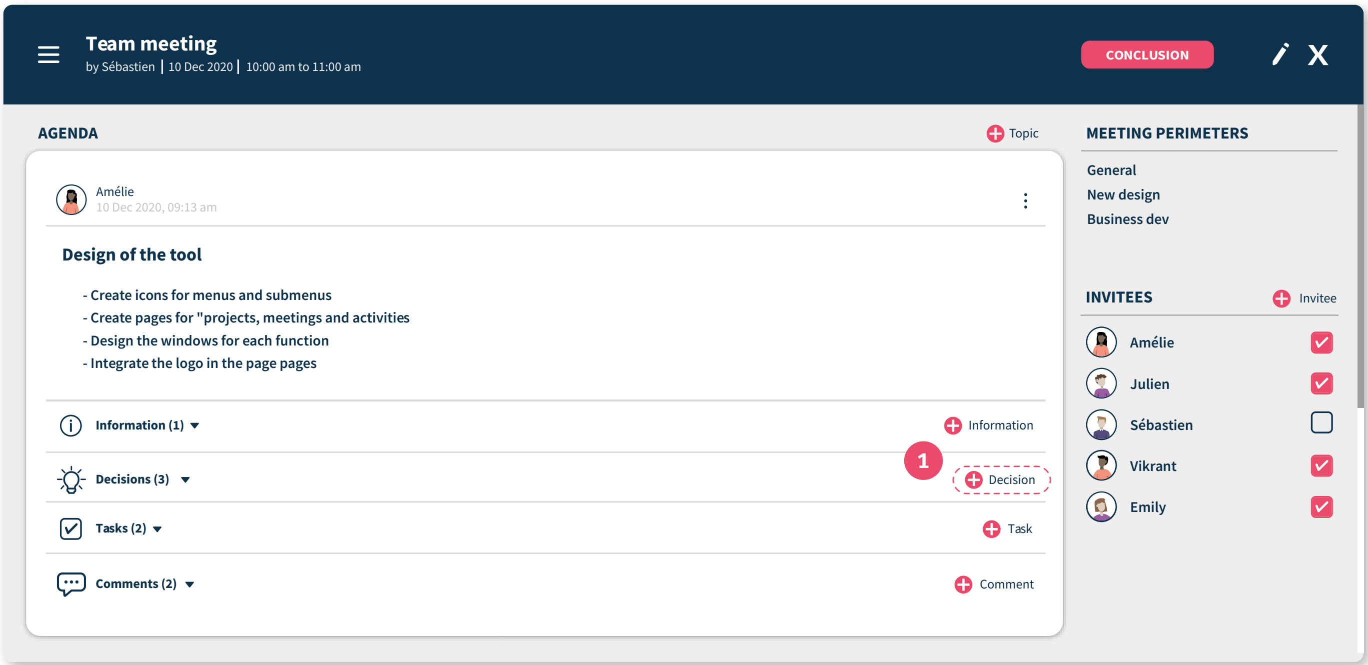


2. On the window that opens, enter the relevant information.
3. Enter the project(s).
4. Enter the importance.
5. Click on «*SAVE*»

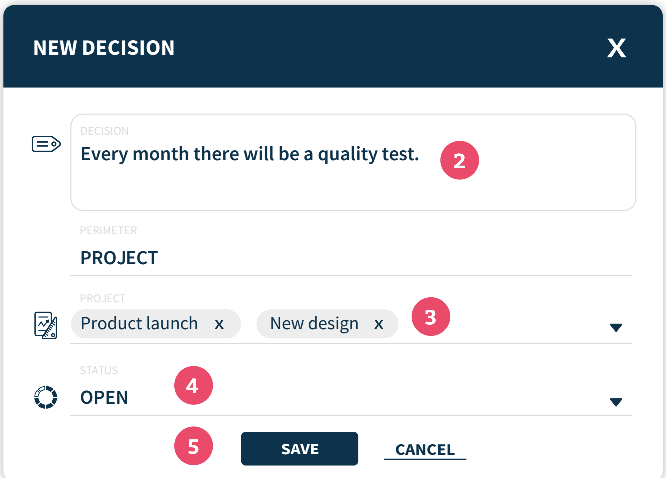


6.6.3 Add decisions to a meeting

1. Click on «+ *Decision*» on the right side of the topic box.

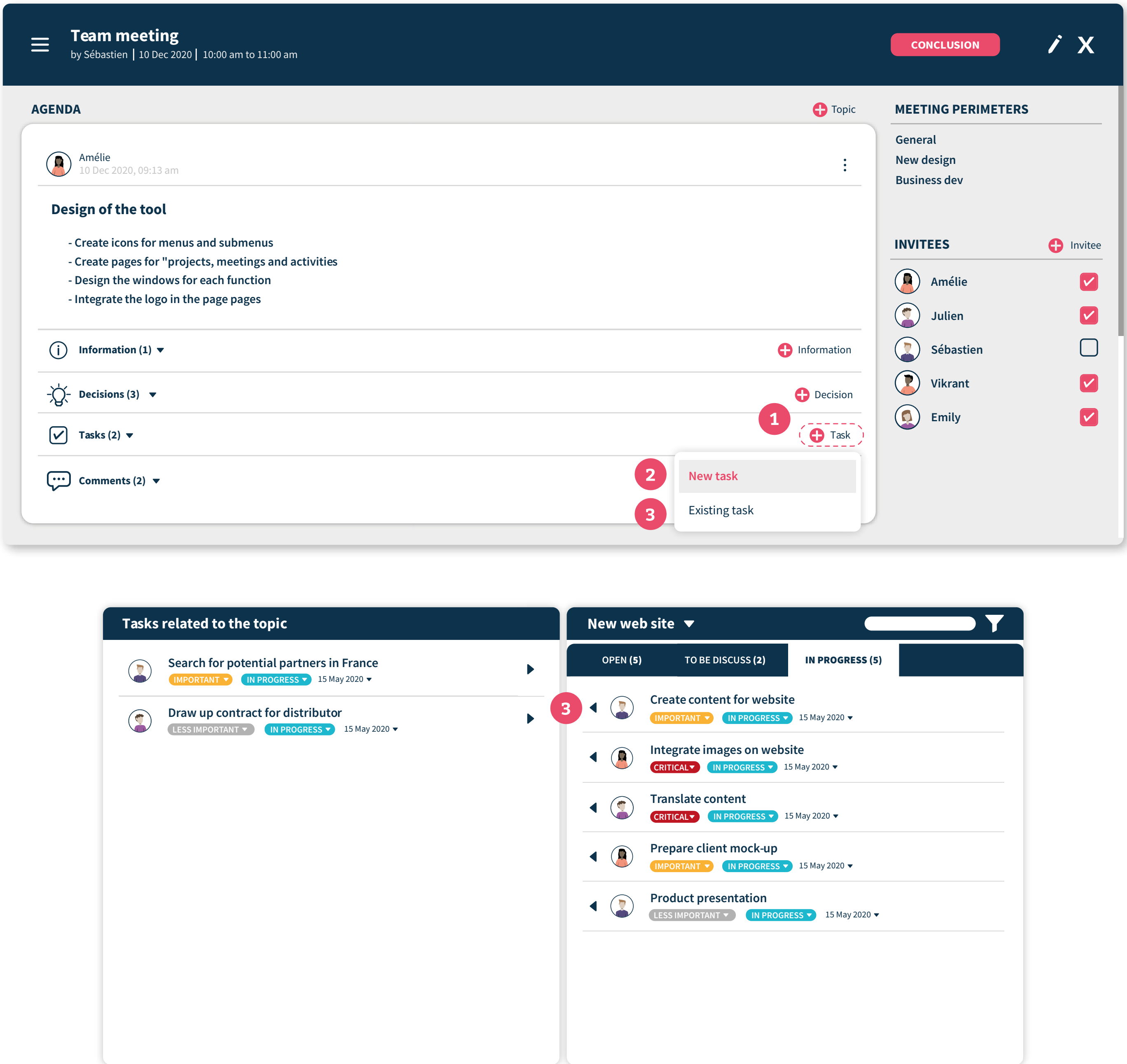


2. On the window that opens, enter the relevant decisions.
3. Enter the project(s).
4. Enter the status.
5. Click on «*SAVE*»



6.6.4 Add a task to a meeting

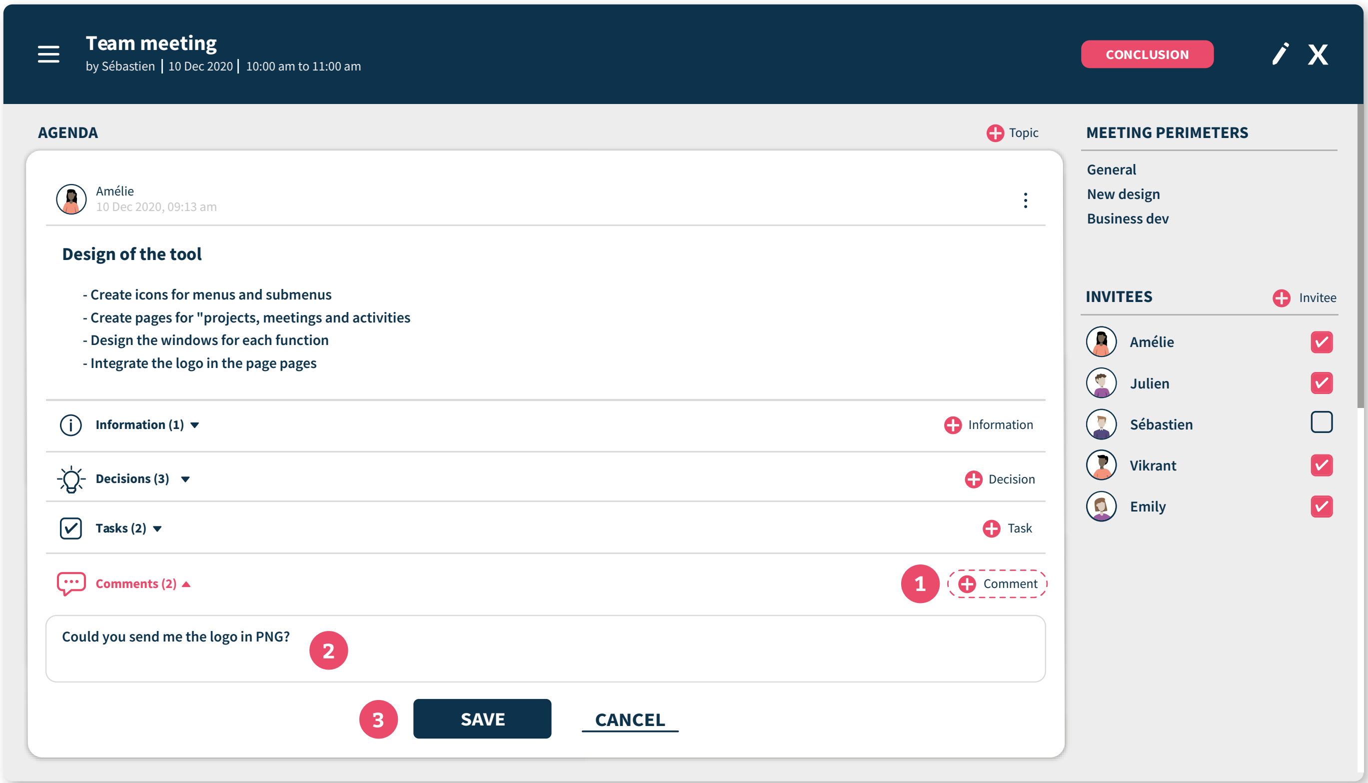
1. Click on «+ *Task*» on the right side of the topic box.
2. Click on «*New task*» if you want to create a new task.
3. Click on «*Existing task*» if you want to add a task previously created:
   - Click on the « < » button on the left side of the task name to add that task to the meeting topic. ***(Fig.6)***



(Fig. 6)

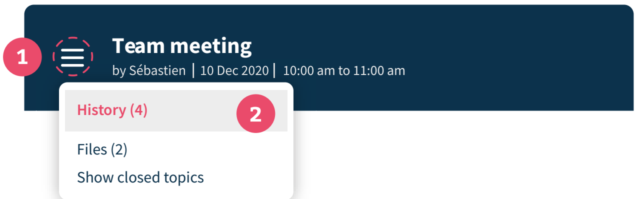
6.6.5 Add a comment to a meeting

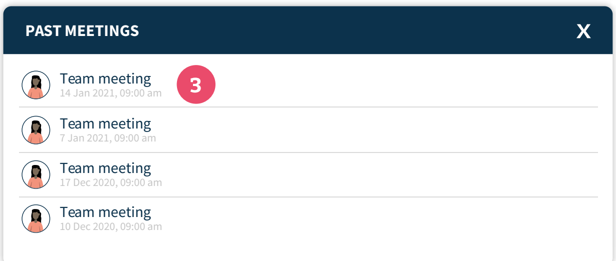
1. Click on «+ *Comment*» on the right side of the topic box.
2. Enter your comment.
3. Click on «*SAVE*»



6.6.6 Meeting history

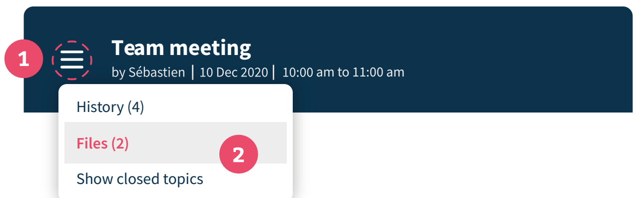
1. Click on the "Burger menu" on the left side of the meeting window.
2. Click on «*History*»
3. Click on one of the meeting minutes to open it.



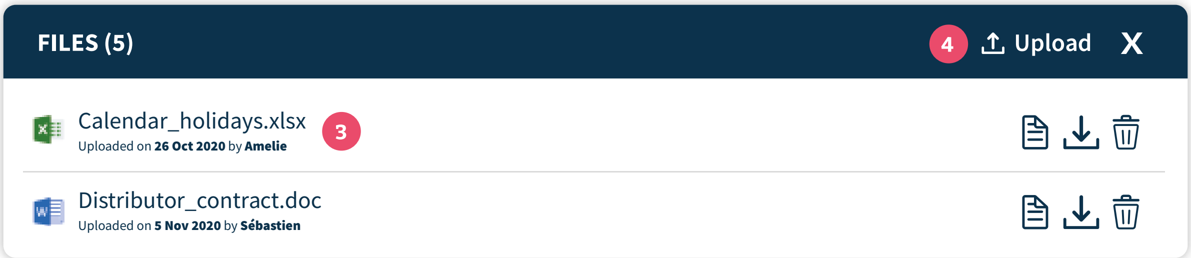


6.6.7 Meeting files

1. Click on the "Burger menu" on the left side of the meeting window.
2. Click on «*Files*»

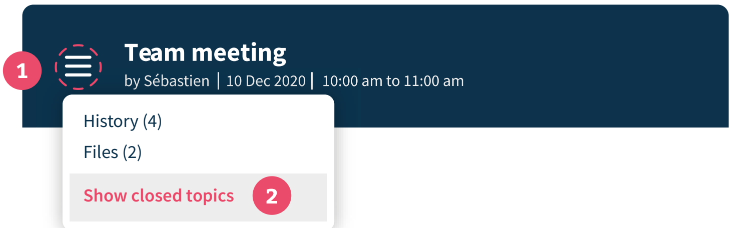


3. Click on one of the existing files if you want to download it.
4. Click on «*Upload*» if you want to add a file to the meeting.



6.6.8 Show / Hide the closed topics

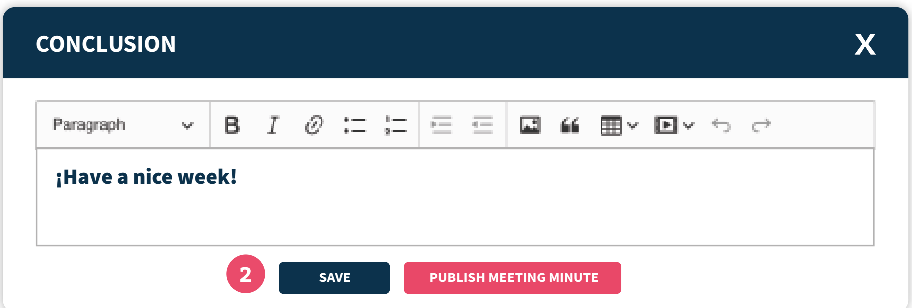
1. Click on the “Burger menu” on the left side of the meeting window.
2. • Click on «*Show closed topics*» if you want to show the closed topics discussed on the past meetings that are no longer on the agenda.
   • Click on «*Hide closed topics*» if you do not want to see the topics discussed on the past meetings that are no longer on the agenda.



6.6.9 Conclude a meeting

1. Click on the « *CONCLUSION* » button on the top right of the meeting window.

2. Click on «*SAVE*» once the minute of meeting is done.



7 Home

7.1 Dashboard

7.1.1 My tasks

1 In « *My tasks* » box:
- Click on «*X tasks*» to see all your tasks.
- Click on «*X late*» to see your late tasks.
- Click on «*X due this week*» to see your tasks for the week.

7.1.2 Completed tasks

2 In « *Completed tasks* » box:
- Click on «*X completed yesterday*» to see the tasks that you completed the day before.
- Click on «*X completed this week*» to see the tasks completed during the week.

7.1.3 Meetings today

3 In «*Meetings today*» box:
- Click on «*X meetings*» to see your meetings during the day.

7.1.4 Day plan

4 In «*Day plan*» box:
- Click on «*X tasks*» to see the tasks for the day.

7.1.5 Graphics

1. Click on a part of any graph to get a global view of your tasks, or to access a specific project or department.
2. Click on the «*Enlarge*» button to have a bigger view of the graphics.

7.2 Day plan

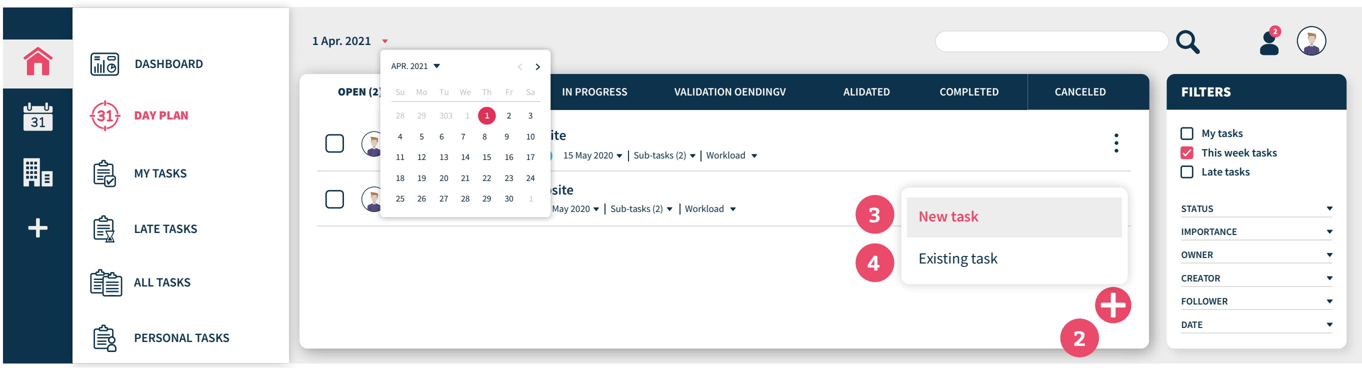
Your plan for the day is your tasks for the day.

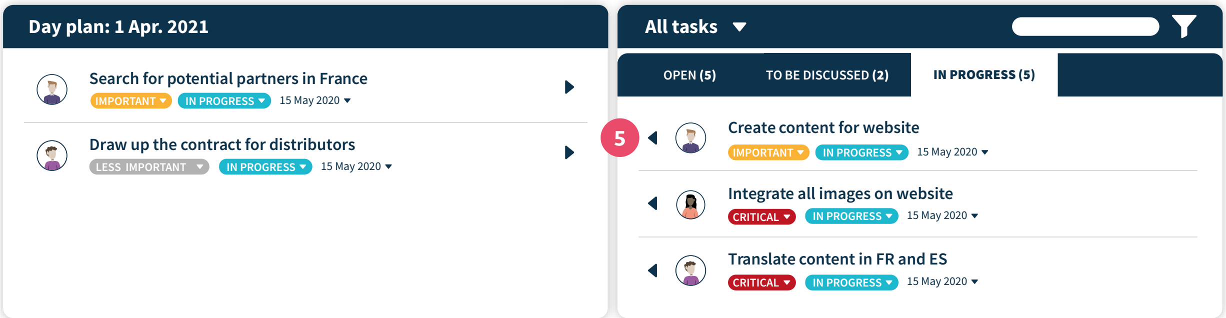
7.2.1 Select a specific day

1. Click on the date at the top left of your screen to select a desired day.

7.2.2 Create and/or add a task from the day plan

2. Click on the « + » button on the bottom right of the screen.
3. Click on «*New task*» if you want to create a task.
4. Click on «*Existing task*» if you want to add an existing task to yur day plan:
5. Click on the « < » button on the left side of the task title from the right window to add it to the day plan.





7.3 My tasks

1. Here you can see the list of all of your tasks. To go further, you can refer to module 4: *«Task management» (p. 35)*

7.4 Late tasks

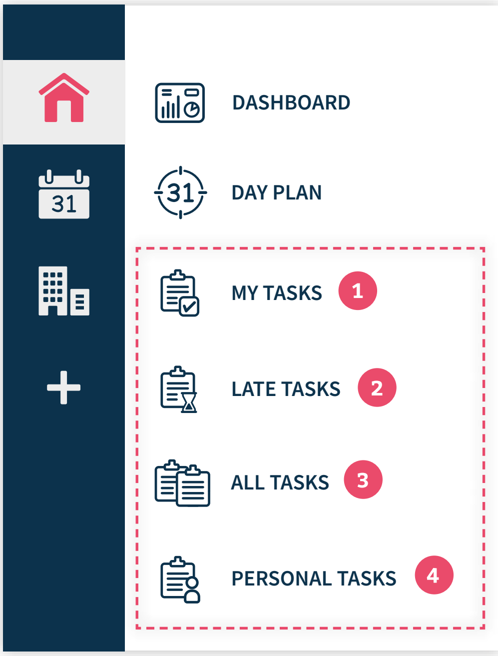
2. Here you can see the list of all your late tasks. To go further, you can refer to module 4: *«Task management» (p. 35)*

7.5 All tasks

3. Here you can see the list of everyone tasks. To go further, you can refer to module 4: *«Task management» (p.35)*

7.6 Personal tasks

4. Here you can see your personal tasks. To go further, you can refer to module 4: *«Task management» (p. 35)*



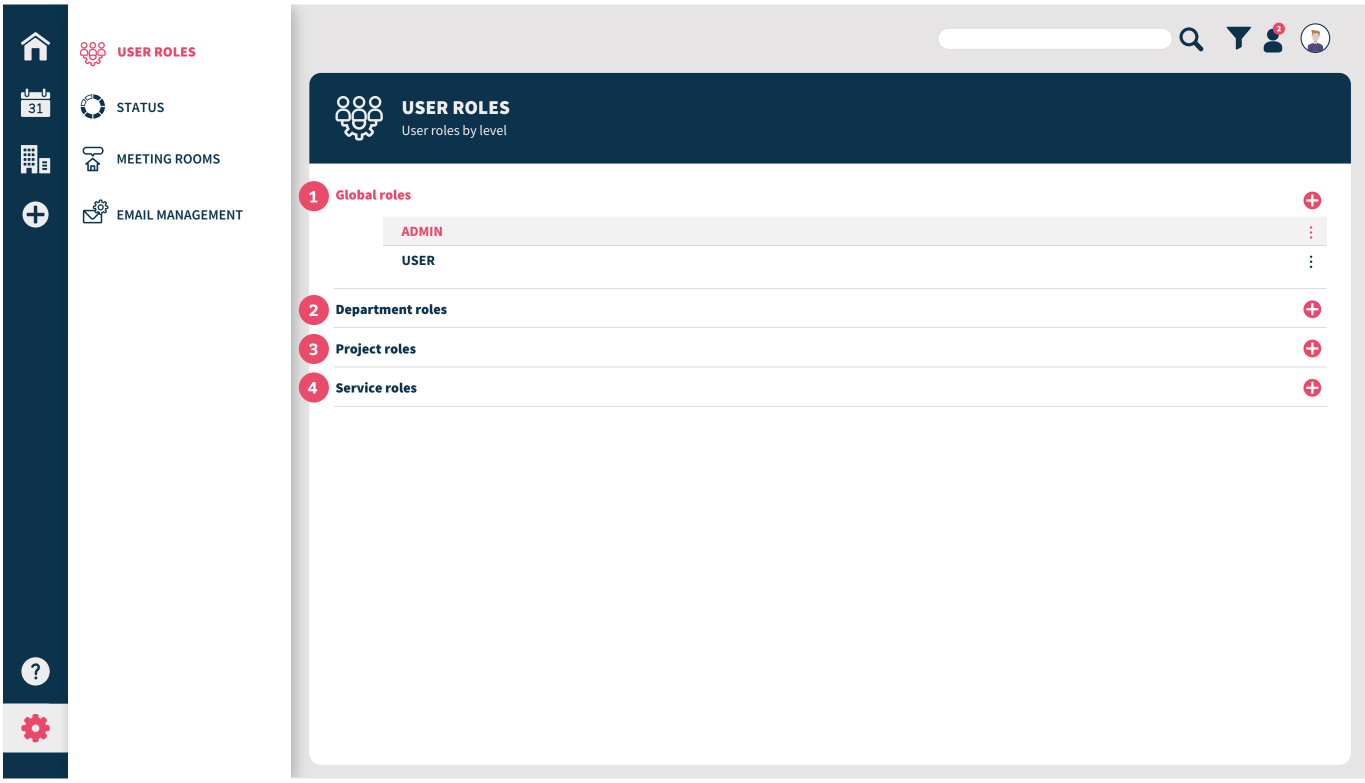
8 Settings

** The TAMPLO team is at your service to help you set up your account: info@tamplo.com*

8.1 User roles

There are four levels of user roles within TAMPLO (the same person can have a different role in two perimeters of the same level):

1. Global roles
2. Department roles
3. Project roles
4. Service roles



8.1.1 Modify the user role name

All roles can be modified (including roles by default).

8.1.2 Users management

- Read rights allow you to see the users who have this role and thus be able to assign tasks to them, for example.
- Write rights allow you to manage the users who have this role (add, delete...).

8.1.3 Resources access rights

Each role has configurable read and write access rights.

- A read access right means that members with this right can consult this resource (task, document, work phase...).
- A write access right means that members with this right can modify this resource.

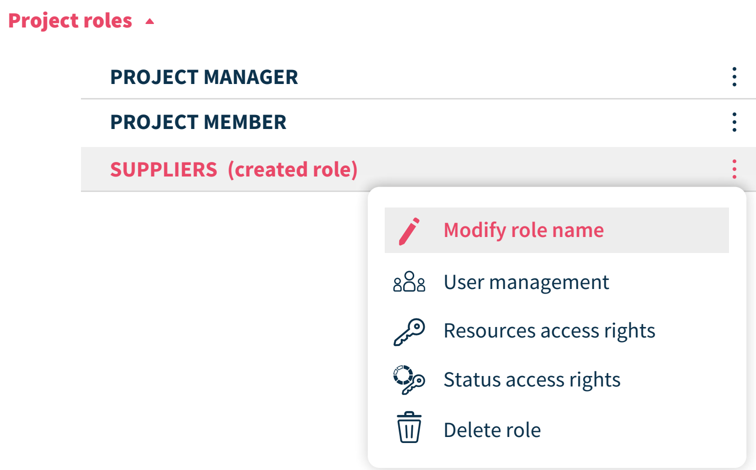
8.1.4 Status access rights*

**Only available for project and service user roles.*

- This module allows you to determine who can view, use or modify a task with a given status.

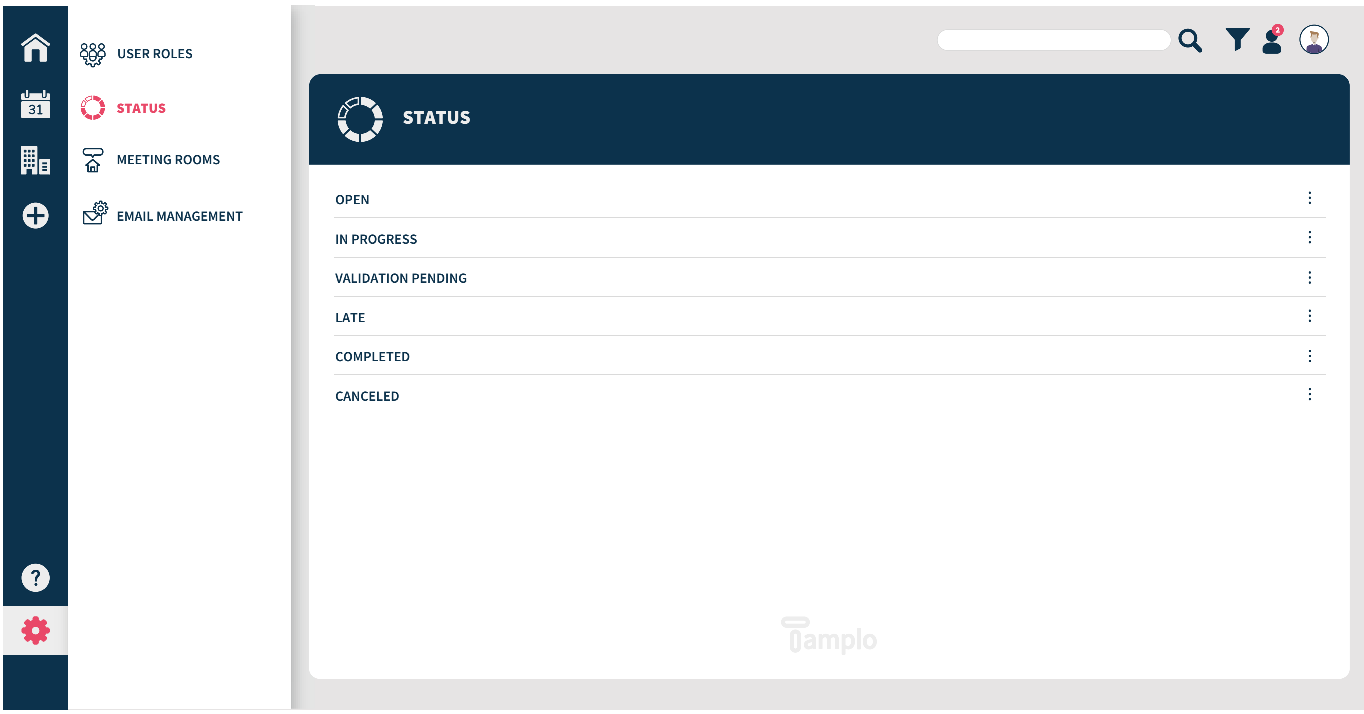
8.1.5 Delete a rol

- The roles by default can be modified but cannot be deleted (for example, it is not possible to delete the role: Project Member).



8.2 Status

List of available statuses by default:
OPEN
IN PROGRESS
VALIDATION PENDING
LATE
COMPLETED
CANCELED

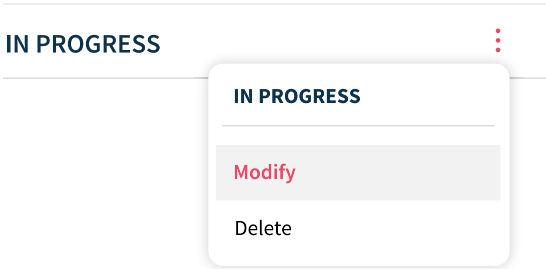


8.2.1 Modify a status

All statuses can be modified (including statuses by default).

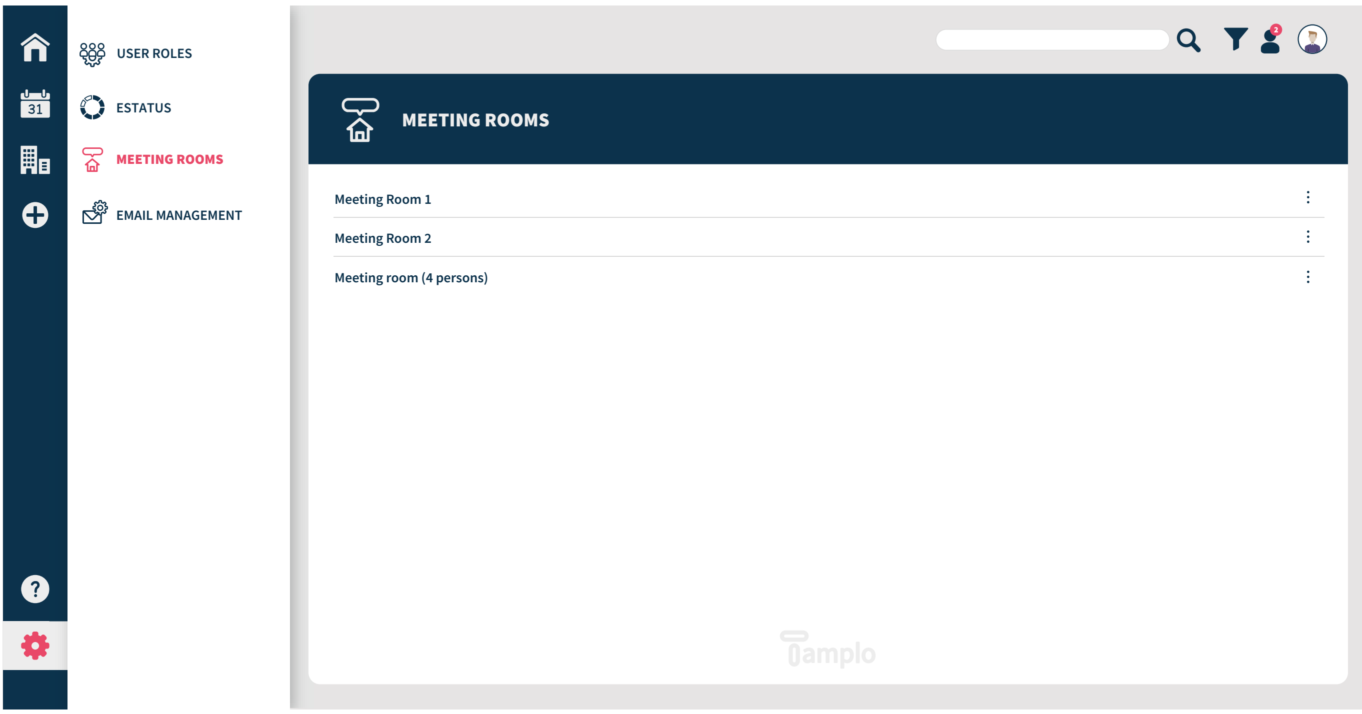
8.2.2 Delete a status

- Base statuses *(OPEN / COMPLETED / CANCELED)* can be modified but CANNOT be deleted.



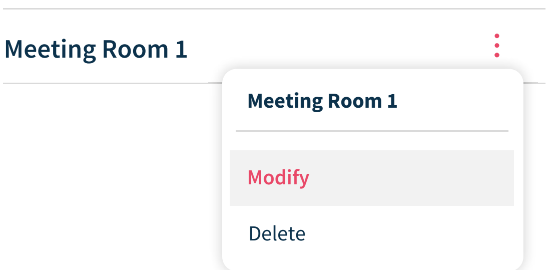
8.3 Meeting rooms

This module allows you to add meeting places that can be used when organizing a meeting.



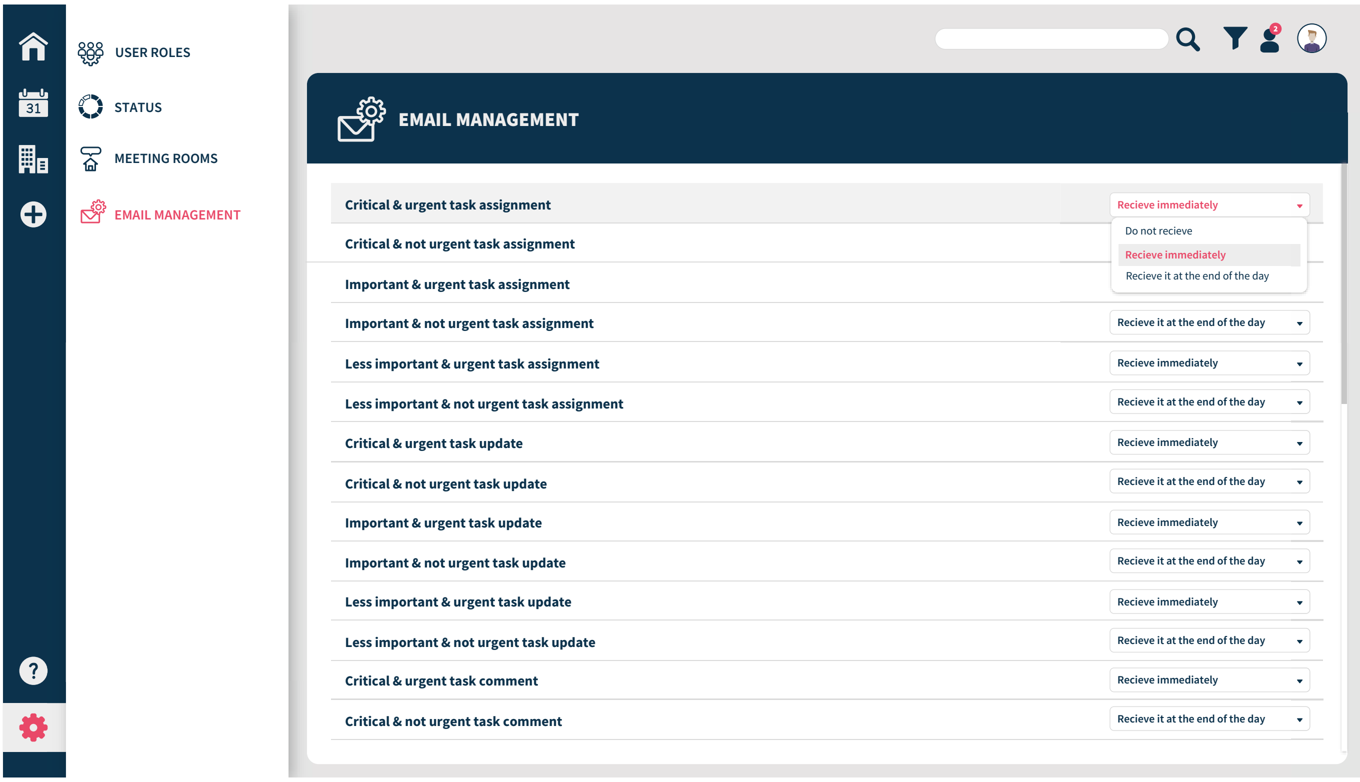
8.2.1 Modify a meeting room

8.2.2 Delete a meeting room



8.4 Email management

All TAMPLO notifications appear at the top right of your screen, but it is also possible to receive email notifications so that you don't miss any important information.
Each user can decide if he/she wants to receive an email depending on the type of notification.
For example: Assignment of a critical and urgent task.



There are three types of notifications available:

- Do not receive (no mail will be sent)
- Receive immediately (an email will be sent automatically)
- Receive in a summary email (all notifications of this type will be grouped in a single email that will be sent in the evening).

GO FROM THE **MEETING**

INTO **SUCCESS!**

info@tamplo.com