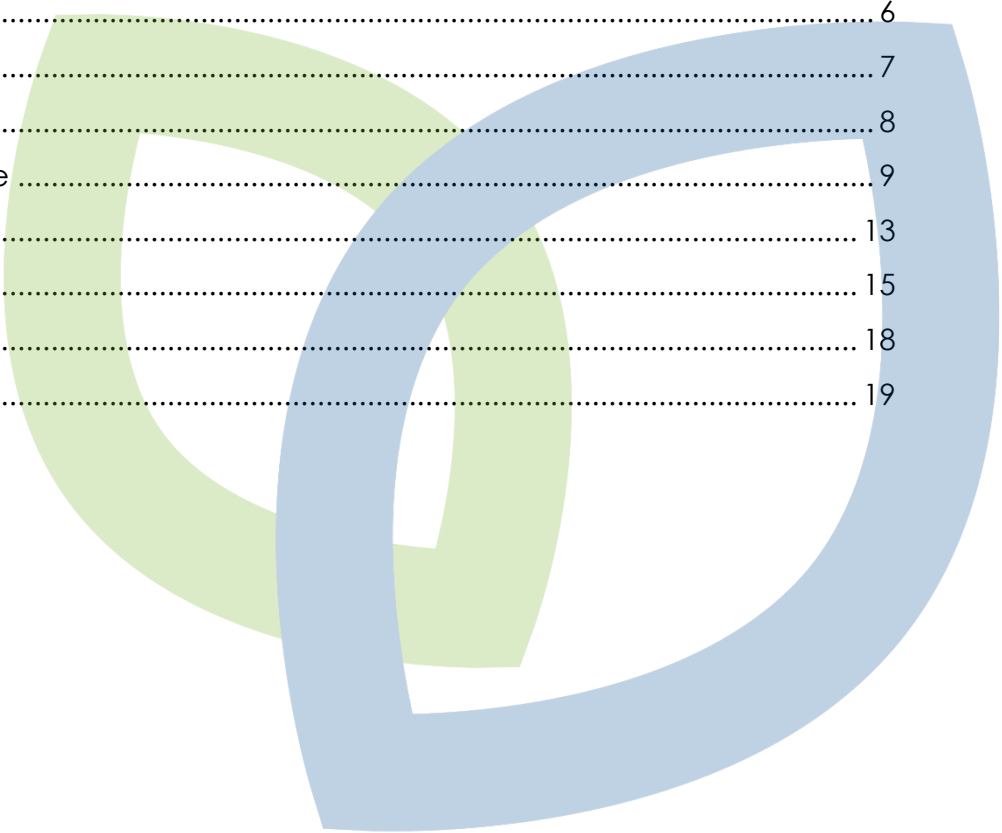


MyCitronHygiene.com
Welcome to The Citron Portal
Site Administrator's Guide



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Introduction

Thank you for registering for access to the MyCitronHygiene.com Customer Portal. The Customer Portal has been designed to not only present you the Customer with vital Financial information such as copy Invoices and Statements, but also with extensive information with regard to Citron Services that are provided to your Organisation and the supporting information you require from Citron Hygiene as part of the Service provision.

Citron Hygiene are constantly working on giving you the Customer the best experience both in terms of a quality service to your premises, but also with our online presence with the Customer Portal where we will be making data and information available to you to support you and your Organisation.

In order to manage the outputs and meet your Organisation needs, the MyCitronHygiene.com customer Portal has functionality built in to allow you to Organise your business data around your own Organisation and Management structure.

The use of an Organisation Structure within the Portal is optional, but, it also allows you to grant Manager level access rights to people within your Organisation who are responsible for the levels, and Sites attached to those levels, of your Organisation.

More importantly, the Portal will present your Sites using your Organisation Structure data to your end users within your Organisation when they use the Portal, or download and view copies of Management Information Reports.

As well as being able to cater for an Organisation Structure, the Portal also allows you to configure up to 2 user definable fields to enable you to store up to 2 values for each of your Sites/Locations that you require as information when outputs are generated from the Portal such as Management Information Reports.

The more information you add to the Portal that describes your Organisation and the people and responsibilities within it, then the more you will get out of the Portal in terms of information being provided in the format you require for your Organisation.

How you define the Organisation Structure is entirely up to you. But we would advise that you give this some thought before hand and ensure that whatever you decide to build as a Structure will fully support your requirements.

You can configure up to 4 Levels of your Organisation Hierarchy that are attached below a top or root Customer level within Citron Hygiene. The root level will always be you, the Citron Hygiene Customer and as such you do not need to define that level in any way. In the following examples the lines in green would be Levels of an Organisation that are maintained and managed in the Portal by you.

Examples:

Customer (You as the Citron Hygiene Customer Account, always the top most level)

Region (Organisation Level 1)

Area (Organisation Level 2)

Or, if you are a Facilities Management Company who use the services of Citron Hygiene you could have something like:

Customer (You as the Citron Hygiene Customer Account, always the top most level)

Your Customer (Organisation Level 1)

Your Region (Organisation Level 2)

Your Branch (Organisation Level 3)

When defining your structure, always try and work on the principle that a level of your Structure should have at least one Site related to it, or, one or more other Levels below it. Do not try and use the Organisation Structure to define information that is unique to a Single location or Site. You can use the user definable fields to store data that is unique to a Site.

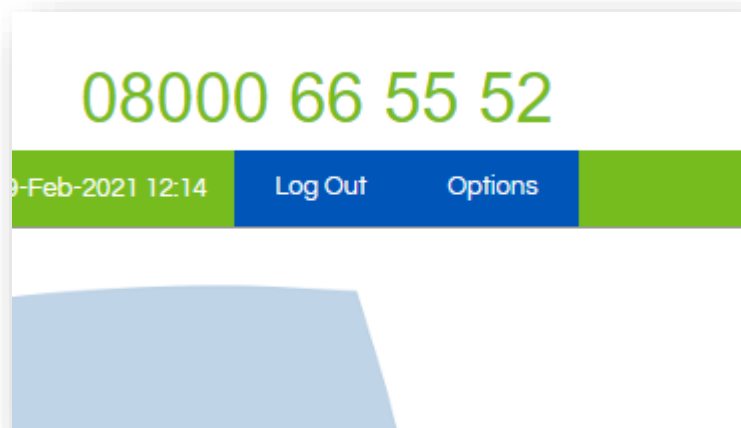
When you have defined your Organisation Levels you can then assign the values relevant to the Levels to create a populated Organisation Structure. The Structure should represent a tree view of your Organisation. The branches of the tree are referred to as **Nodes**. You can assign the person responsible for a **Node** to the Structure and that person will then automatically be related to all data attached to that **Node**. That could be lower Levels of your Structure, or, one or more Sites/Locations that belong to that Level of your Structure.

Terminology Reference

Portal	The MyCitronhygiene.com Customer website or Extranet.
Financial Information	Online access to Copy Invoices, Billing History and Statements.
Site	A location from your Organisation that receives Services from Citron Hygiene, or, that has been created as part of your Contract for Administration or Billing purposes.
Organisation Levels	User Definable descriptions that describe up to 4 levels of an Organisation Structure and up to 2 User Definable fields that can store information about each Site in your Organisation.
Organisation Structure	Your internal Organisation Hierarchy or Structure that defines how your Organisation is managed. The Organisation Structure is used by Management Information reports to organise and group the output of the reports. Sites can also be organised and displayed using your Organisation Structure within the Portal where listed on screen.
Node	A Node is a completed branch of your Organisation Structure that contains a value for the Level of the Organisation. Nodes should contain 1 or more Sites.
Admin Role	The Administrator within your Organisation responsible for the maintenance and up keep of your Organisation information. The Admin user has access to Financial as well as Site related information within the Portal.
Manager Role	A Manager is a user who has responsibility for one or more Sites within your Organisation. A Manager can access the Management Information reports (if configured for your Organisation) as well as access to the site details they are responsible for within your Organisation. A Manager cannot access Financial Information such as Invoices, Statements etc.
Site Role	A Site user would be a person who you wish to grant access to and allow them to see the Site information for their specific site. A Site user cannot access Financial or Management Information.
Brands	You can manage your Brand identity within the Portal. You can create a Brand description and upload a Logo that represents your Brand Identity. The logo will be displayed as part of your Organisation details and it will also be used in Management Information reports.

Options

The Options Menu appears at the top right hand section of the Portal page and is available at all times when navigating the Portal.



Overview	Puts you back onto the main Portal start up page.
Contact Us	Allows you to message Citron Hygiene from the Portal. You can speed up the response to your message or query by choosing a relevant enquiry type. This will enable us to channel your enquiry to the relevant department as quickly as possible.
Edit Profile	Allows you to maintain your user details.
Management	The Management option will display a sub menu with options to enable you to organise your Citron Contract around your internal Organisation Structure.
Make a Payment	Takes you to the PayOCS online payment website.
Log Off	Logs you off of the Portal.

Management

The Management sub menu option contains the options required to Organise your Citron Contract in a way that represents your own internal Organisation Structure. This is optional functionality and it is your responsibility to ensure that the details are maintained and up to date if you choose to use this functionality. Organisation data will be used within Management Information reporting within the Portal. You will also see your Organisation information shown on screen against the Sites when you have completed the configuration and maintenance of the data.

IMPORTANT: Citron Hygiene accept no responsibility for the contents or maintenance of your Organisational Structure or data organised by that Structure within the Portal.



User Guide	This user guide.
Organisation Levels	Describes up to 4 levels of your Organisation Structure and creates a Hierarchical representation of that structure. Also allows up to 2 user definable fields that can store information maintained by you against each of your Sites.
Organisation Structure	The relationship between the Organisation Levels and the values required for each level to represent your structure.
Organise Sites	You can link each of your Sites to a position within your Organisation Structure.
Manager Access	Allows you to grant access to your Management within your Organisation and link them to one or more of the Levels in your Organisation Structure.
Site Access	Allows you to grant access to specific users who need access to one or more sites but do not require access to Financial or Management Information reporting. These would typically be persons within your Organisation who are responsible for the day to day operation of the Site.
Brands	Allows you to maintain your Brand Identity within the Portal.

Organisation Levels

Organisation Levels allow you to configure the Portal to best describe your Organisation. To enable an Organisation Structure in the Portal you must first describe how your Organisation is structured.

You can define up to 4 levels of an Organisation Hierarchy. We will automatically put your Organisation at the top of the Structure, we refer to this as the root of your Structure. You can then break down your Organisation below the root level.

The following image gives an example of descriptions for an Organisation.

Field	Sort Order	Your Description
Organisation Level 1	1	<input type="text" value="Sector"/>
Organisation Level 2	2	<input type="text" value="Region"/>
Organisation Level 3	3	<input type="text" value="Branch"/>
Organisation Level 4	4	<input type="text" value="Operational Area"/>
Site Reference 1	-	<input type="text" value="Loc Ref"/>
Site Reference 2	-	<input type="text" value="Sub Loc Ref"/>

The Organisation levels must be described starting at Level 1. All levels are optional but you must describe all the Levels you wish to use to enable you to enter the required values for the Level Descriptions in the Organisation Structure option.

As you can see from the above image, there are also options to describe up to 2 user definable fields that you can maintain per Site.

Organisation Structure

Using the Organisation Structure option allows you to build your own Organisation Structure and assign the values required for each level of the structure that you create. It is important to make sure that you have all the information required to configure your Organisation to hand. The Portal has been designed to represent and organise your **Sites** around your Organisation Structure.

Below is an example of an Organisation Structure based on the Organisation Level descriptions defined in the previous section.

Organisation Structure Configuration				
Code	Level	Manager	Attached Sites	Action
Customer 000000115 - ALDER BRIDGE COMMUNITY & TECHNOLOGY SCH	0 - (Root)	-	-	Add Child Level
└ East	1 - Sector	ben.bell@ocs.co.uk	0	Add Child Level / Edit / Delete
└└ Region 4	2 - Region	ben.bell@ocs.co.uk	0	Add Child Level / Edit / Delete
└└└ Branch E	3 - Branch		0	Add Child Level / Edit / Delete
└└└└ Area EA	4 - Operational Area		0	Edit / Delete
└ North	1 - Sector	ben.bell@ocs.co.uk	0	Add Child Level / Edit / Delete
└└ Region 1	2 - Region		0	Add Child Level / Edit / Delete
└└└ Branch A	3 - Branch		0	Add Child Level / Edit / Delete
└└└└ Area AA	4 - Operational Area		1	Edit / Delete
└└└└ Area AB	4 - Operational Area		0	Edit / Delete
└└└└ Branch B	3 - Branch		0	Add Child Level / Edit / Delete
└└└└ Area BA	4 - Operational Area		0	Edit / Delete
└ Region 2	2 - Region		0	Add Child Level / Edit / Delete
└└ Branch C	3 - Branch		0	Add Child Level / Edit / Delete
└└└ Area CA	4 - Operational Area		0	Edit / Delete
└ South	1 - Sector	benjamin.gallagher@ocs.co.uk	0	Add Child Level / Edit / Delete
└└ Region 3	2 - Region		0	Add Child Level / Edit / Delete
└└└ Branch D	3 - Branch		0	Add Child Level / Edit / Delete
└└└└ Area DA	4 - Operational Area		0	Edit / Delete
└ West	1 - Sector	benjamin.gallagher@ocs.co.uk	0	Add Child Level / Edit / Delete
└└ Region 5	2 - Region		0	Add Child Level / Edit / Delete
└└└ Branch F	3 - Branch		0	Add Child Level / Edit / Delete
└└└└ Area FA	4 - Operational Area		0	Edit / Delete

You can see the tree structure that represents the Organisation in the **Code** column. The codes stored against the Structure are referred to as **Nodes**.

You can also see the **Level** and the description for the **Level**.

If there is a **Manager** user assigned to a **Level**, then that is also displayed.

If there are **Sites** linked to a **Level**, then the number of **Sites** is displayed.

The **Action** column gives you the options needed to build and maintain your Organisation Structure.

Edit

If you wish to change the description for a Level or **Node**, then use the **Edit** option for the **Node** you want to change. The following popup window will be displayed:

If you wish to change the value against a Node in the Structure, then you can change it and save it using the popup. The change will immediately take affect.

If you wish to move the **Node** to a different Parent **Node**, then use the drop down selection of valid Parent **Nodes** and select the new Parent **Node** you require.

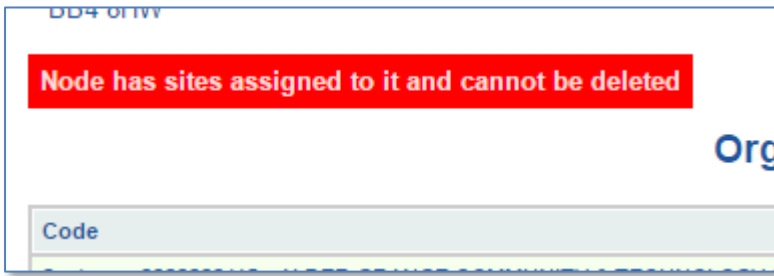
Note: you can only move a **Node** to a parent of the same level of the current **Node**, e.g. a Level 3 **Node** and only be attached to a Level 2 **Node**.

Once saved the change will take immediate affect.

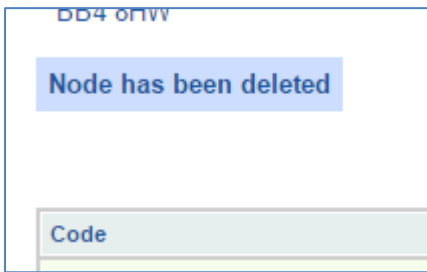
Any **Sites** attached to the **Node** will also be immediately moved with the **Node** to the new position in the Organisation Structure.

Delete

You cannot delete a **Node** if there are **Sites** linked to the **Node**. You will see the following message on the screen if you attempt this:



If there are no **Sites** linked to a **Node**, you will see the following message after deleting the **Node**:



Organise Sites

When your Organisation Structure build is completed you can then link your **Sites** to the **Nodes** of your Organisation Structure.

Below is an example of how a **Site** is displayed once linked to an Organisation Structure:



The screenshot shows a table titled "Organise Sites" with the following columns: Site ID, Account/Site, Address, Post Code, Organisation Position, Loc Ref, Sub Loc Ref, and Action. The first row contains the following data: Site ID: 000000115, Account/Site: ALDRYS-1, Address: ALDER GRANGE COMMUNITY & TECHNOLOGY SCHD,CALDER ROAD, Post Code: BB4 8HW, Organisation Position: North, Region 1, Branch A, Area AA, Loc Ref: A, Sub Loc Ref: B, and Action: Edit.

Site ID	Account/Site	Address	Post Code	Organisation Position	Loc Ref	Sub Loc Ref	Action
000000115	ALDRYS-1	ALDER GRANGE COMMUNITY & TECHNOLOGY SCHD,CALDER ROAD	BB4 8HW	North, Region 1, Branch A, Area AA	A	B	Edit

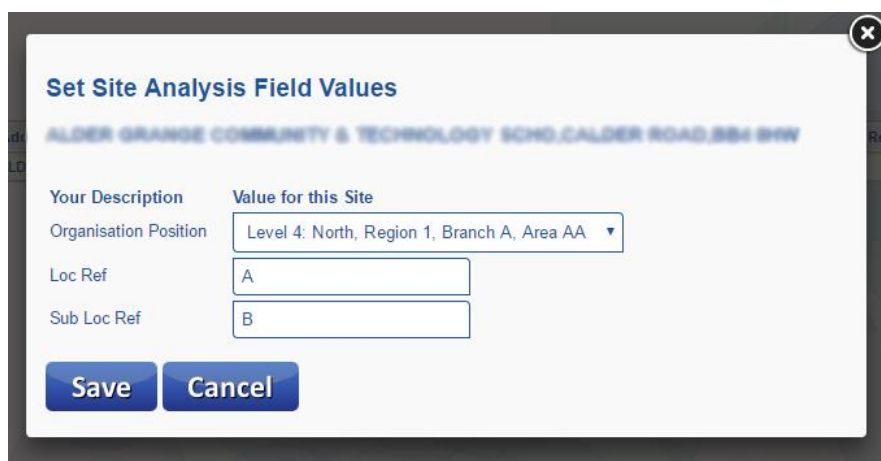
The table showing the **Site** details picks up your Organisation information as well as the 2 optional user definable fields and displays them on screen. You can also sort by these fields.

Sorting will show which **Sites** are not yet attached to a **Node** in your Organisation Structure if you use the Organisation Position column. Similarly, sorting using a user definable **Site** field will also show which **Sites** have missing information. This will aid in your maintenance and upkeep of the data.

Edit

To link a site or to change an existing Site link to the Organisation Structure you need to use the **Edit** option against the Site(s) displayed on screen. This needs to be done on a Site by Site basis.

The **Edit** option brings up the following popup window:



The screenshot shows a popup window titled "Set Site Analysis Field Values" for the site "ALDER GRANGE COMMUNITY & TECHNOLOGY SCHD,CALDER ROAD, BB4 8HW". It contains a table with two columns: "Your Description" and "Value for this Site". The rows are: Organisation Position (Level 4: North, Region 1, Branch A, Area AA), Loc Ref (A), and Sub Loc Ref (B). At the bottom are "Save" and "Cancel" buttons.

Your Description	Value for this Site
Organisation Position	Level 4: North, Region 1, Branch A, Area AA
Loc Ref	A
Sub Loc Ref	B

Using the drop down option for Organisation Position you can move the Site to a different **Node** in your Organisation Structure.

You can also amend the values against any User Definable fields you may have configured for your Organisation. Once you are happy with your changes select the

Save option to save your changes. Once saved, the change will take immediate effect.

IMPORTANT: When moving Sites to other Nodes in your Organisation Structure they will and you have different Managers responsible for those Nodes, the Site will inherit the Manager responsible under the Node selected and be removed from the Manager responsible for the Site's old Node relationship.



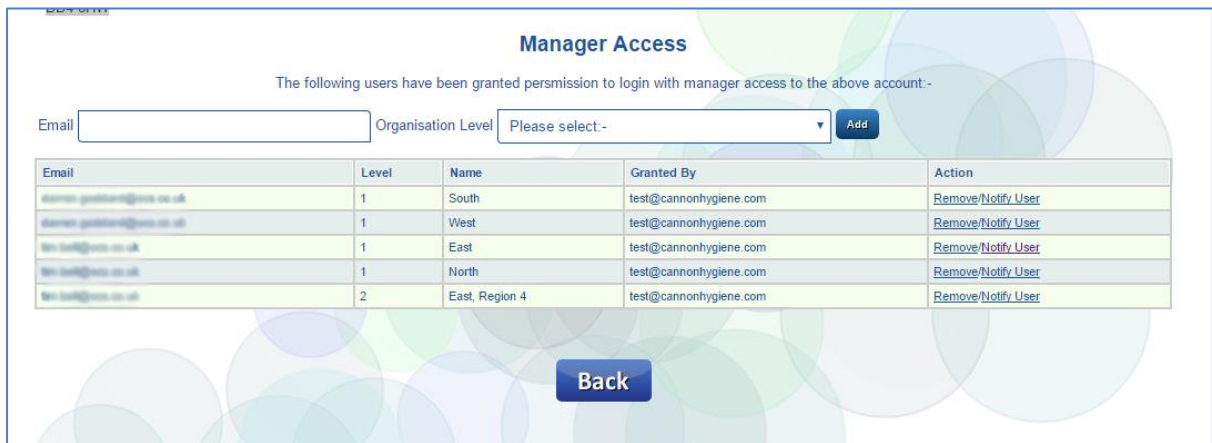
Manager Access

The role of Manager within the Portal gives access to the Management Information Reports Tab, the Sites Tab and the FAQs Tab. Also, the number of choices available to a Manager user in the Options menu are limited to the those of a Site user.

A Manager role is also used to assign an individual to a **Node** within the Organisation Structure. This is how you relate your Organisation Structure to the Mangers(s) responsible for the various levels of your Organisation Hierarchy.

Any reporting that is produced within the Portal will use your Organisation Structure to organise the data output. The reporting will also use the Manager data linked to the Organisation Structure as part of the output to help make the reporting more meaningful in terms of who is responsible within your Organisation.

An example of the Manager Access screen looks like this :



The screenshot shows the 'Manager Access' screen. At the top, it says 'The following users have been granted permission to login with manager access to the above account:-'. Below this, there are two input fields: 'Email' and 'Organisation Level' (with a dropdown menu showing 'Please select-'). To the right of the 'Organisation Level' dropdown is an 'Add' button. Below these fields is a table with the following data:

Email	Level	Name	Granted By	Action
test@citronhygiene.com	1	South	test@citronhygiene.com	Remove/Notify User
test@citronhygiene.com	1	West	test@citronhygiene.com	Remove/Notify User
test@citronhygiene.com	1	East	test@citronhygiene.com	Remove/Notify User
test@citronhygiene.com	1	North	test@citronhygiene.com	Remove/Notify User
test@citronhygiene.com	2	East, Region 4	test@citronhygiene.com	Remove/Notify User

At the bottom of the screen, there is a 'Back' button.

To create the Role of a Manager for access to a **Node** and the **Sites** under the **Node**, you first need to link the Email Address for the Manager with a Level of your Organisation Structure.

This is done by entering the email address of your Manager into the Email field and then selecting the **Node** or Level of the Organisation Structure the Manager is responsible for.

Example:

Manager Access

The following users have been granted permission to login with manager access to the above account:-

Email Organisation Level

Email	Level	Name	Action
test@cannonhygiene.com	1	South	Remove/Notify User
test@cannonhygiene.com	1	West	Remove/Notify User
test@cannonhygiene.com	1	East	Remove/Notify User
test@cannonhygiene.com	1	North	Remove/Notify User
test@cannonhygiene.com	2	East, Region 4	Remove/Notify User

Please select:-

- Level 1: East
- Level 1: North
- Level 1: South
- Level 1: West
- Level 2: East, Region 4
- Level 2: North, Region 1
- Level 2: North, Region 2
- Level 2: South, Region 3**
- Level 2: West, Region 5
- Level 3: East, Region 4, Branch E
- Level 3: North, Region 1, Branch A
- Level 3: North, Region 1, Branch B
- Level 3: North, Region 2, Branch C
- Level 3: South, Region 3, Branch D
- Level 3: West, Region 5, Branch F
- Level 4: East, Region 4, Branch E, Area EA
- Level 4: North, Region 1, Branch A, Area AA
- Level 4: North, Region 1, Branch A, Area AB
- Level 4: North, Region 1, Branch B, Area BA

If you assign a Manager to a **Node** that already has a Manager assigned you will get the following message:

Organisation level already assigned to a manager

Manager Access

The following users have been granted permission to login with manager access to the above account:-

Email Organisation Level

If the Manager assignment is successful, the Portal will email the Manager the details required to login to the Portal and access is granted with immediate affect.

IMPORTANT – A Node of your Organisation Structure can have only one Manager responsible. But, a Manager can be responsible for more than one Node of your Organisation Structure.

Under the **Action** column of the table you have 2 options. They are:

Remove

Removes a Manager from the **Node** of the Organisation Structure

Notify User

Re-sends the email to the Manager from the Portal with login details.

When a Manager logs into the Portal for the first time they will be asked to confirm who they are and complete their Portal user profile and contact details.

You do not need to give Site access to a Manager. The Manager is automatically responsible for the Sites that have been linked to the **Node** of the Organisation Structure the Manager is assigned to.



Site Access

The role of Site user within the Portal gives access to the Sites Tab and the FAQs Tab. Also, the number of choices available to a Site user in the Options menu are limited to the required to manage their own Portal user profile.

A Site user is not assigned to a **Node** of the Organisation Structure. A Site user is assigned to one or more Sites within your Organisation. The Site user could be the person on Site responsible for the day to day operation of the Site within your Organisation and who might need access to Site related information in the Portal to support their day to day duties.

It is possible to assign more than one Site to a Site user.

Site user data is not output in Management Information Reports unless it is maintained as a user definable field against each Site. There is no relationship between a Site user and user definable Site data that is maintained automatically by the Portal.

The following users have been granted permission to login with site access to the above account: -

Email Site Please select:-

Email	Site	Granted By	Action
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Granting access to Sites is done by entering an Email address for the Site user, and selecting the Site they need to have access to in the Portal from the drop down list of Sites. When the information has been completed then select the Add option to grant access to the Site with immediate effect.

The Site user will receive an email from the Portal informing them on how to login to the Portal.

Under the **Action** column of the table you have 2 options. They are:

Remove

Removes a Site user from the Site.

Notify User

Re-sends the email to the Site user from the Portal with login details.

When a Site user logs into the Portal for the first time they will be asked to confirm who they are and complete their Portal user profile and contact details.

Brands

If you wish you can upload Branding details for your Organisation. You can define the Brand Name and optionally upload a logo for your Brand Identity.

If you are uploading an image, you can choose the image from a source that is local to your computer by selecting the [Choose File] option. This will open a popup window allowing you to select an image file.

You will need to confirm the process of uploading the image by completing the Captcha and then selecting Save.

Under the **Action** column of the table you have 2 options. They are:

Set as Default

The Brand details will be the default for your Organisation.

Remove

Deletes the Brand details and logo from the Portal.

The Portal will allow you to have multiple Brand details within your Organisation.

The default Brand details will be displayed as part of the Portal header information for all of your assigned users for the Portal. The default Brand will also be used as Information in the header pages of any Management Information Reports.

In the future it will be possible to also assign Brand details to each of your Sites if you require this.

END.