

Help Desk Tasks User Guide

05 October 2021 (Version 21.4)



COMMERCIAL STATEMENT

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INTRODUCTION

This Help Desk Task Guide talks you through the various help desk tasks that you can create in the Employee Portal. It shows you how each task is used to enable you to make many requests and queries during your daily work using the Employee Portal. This will save you time. Often it will remove the need for you to speak to your manager/supervisor for routine activities such as checking your holiday allowances or finding out when your next duties are.

- Duty Related Tasks
 - Duty Queries
 - Duty Give Aways
 - Duty Pick Ups
 - Duty Swaps
- Detail Tasks
- Diary Tasks
- Document Tasks
- Holiday / Annual Leave Tasks
- Message Tasks
- View News Tasks
- Reporting Tasks

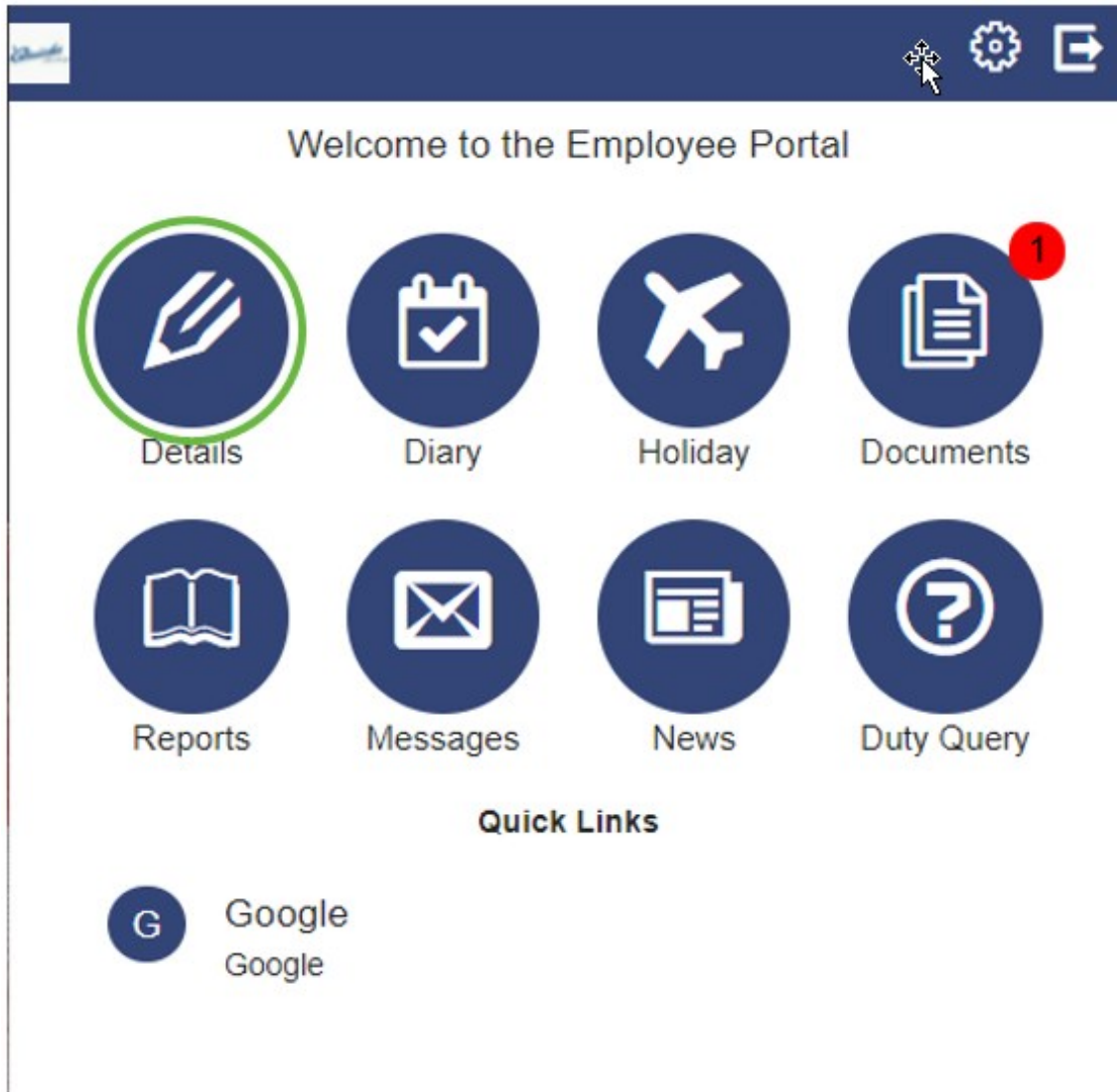
USING HELP DESK TASKS IN THE EMPLOYEE PORTAL

You raise engagement help desk tasks from within the Employee Portal. When you undertake activities such as requesting holiday, updating your personal details, creating messages, asking for new uniform and a variety of other activities, this is done automatically by a task. This section explains how you can do various activities in the Employee Portal.

How do I update my details using the Details Engagement Task?

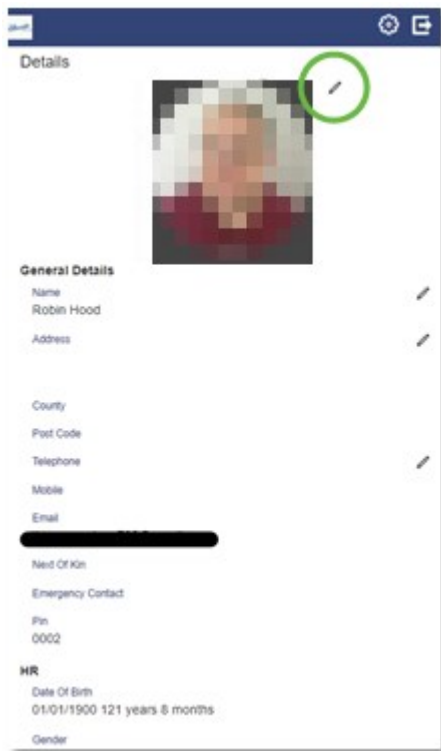
Accessing Details

You can update your personal details by selecting **Details** on the Employee Portal home screen:



Updating / Editing Details

In the personal details screen you can edit any field that has the edit symbol . If you don't see the edit symbol, this has been removed as a function.



When you edit a field, you will be given instructions on what is needed (i.e. if you need to upload a photograph, what the style of photograph is)



Details / Update Name

To change your name we require a proof, please ensure you upload a document that show the official name change.

First Name

Middle Name

Last Name

Change Date

Comments

Please attach a file detailing the proof of your name change.

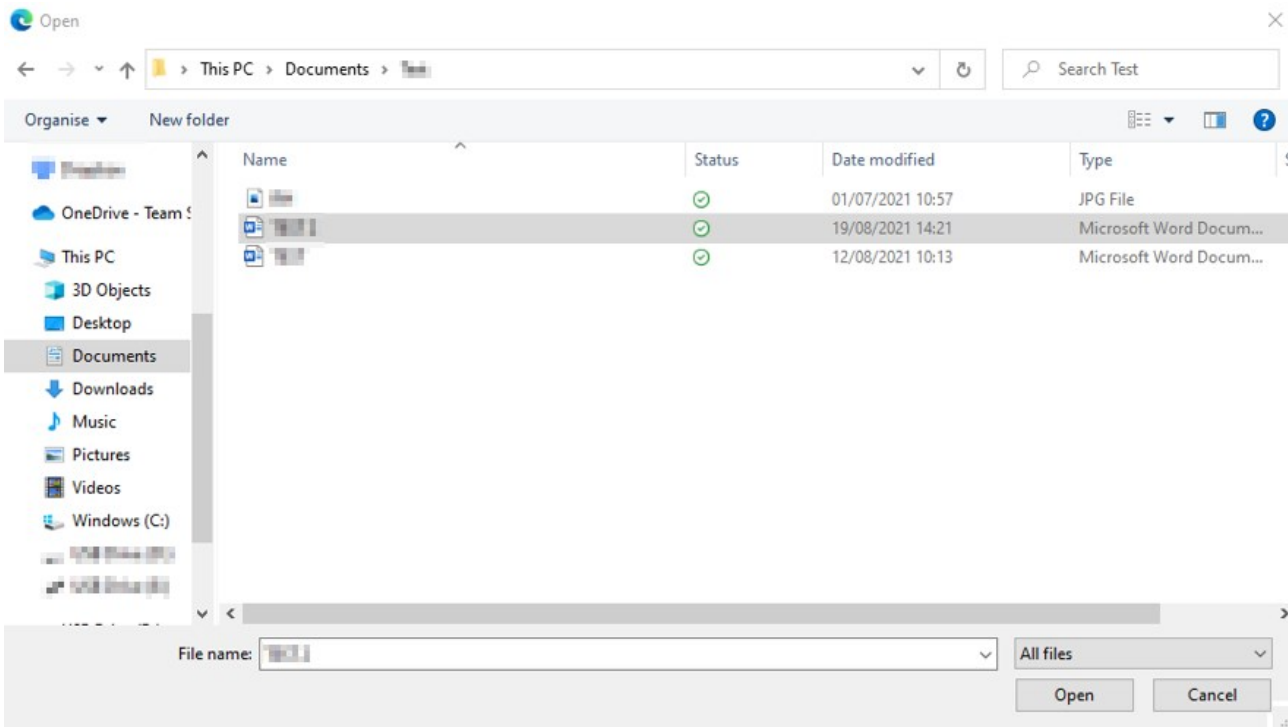
Uploading a Document

You may also be asked to upload documents (i.e. photographs or supporting evidence.)

To upload a file select **Browse**



When prompted, select your file as shown and then select **Open**

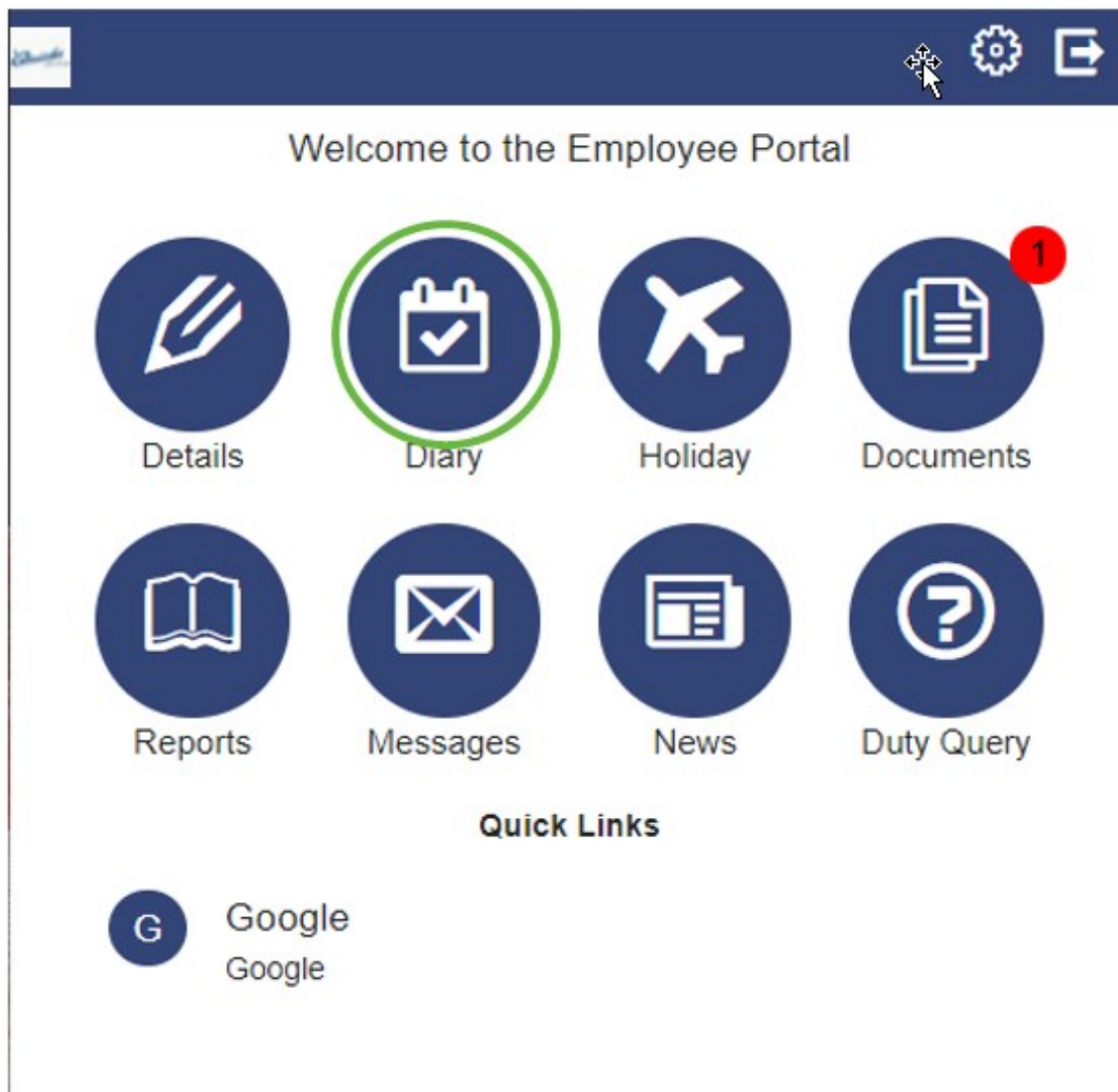


Once your edit is saved you will be informed that it has been successfully submitted. You will be notified of change in status via your message module in the Employee Portal and via email. The change needs to be approved. Once approved, it will be automatically updated for you.

How do I manage my diary using the Diary Engagement Task?

Accessing Diary

You can manage your diary by selecting **Diary** on the Employee Portal home screen:



Diary View

The **Diary View** shows your schedule and diary events:

The screenshot shows the 'Diary' interface with the following callouts:

- Select to mark day available for work:** Points to the 'Available' button (thumbs up icon).
- Select to confirm all shifts/duties that have not been confirmed:** Points to the 'Confirm All' button (checkmark icon).
- Select to search for any open shifts/duties:** Points to the 'Work Search' button (magnifying glass icon).
- Select to send a query to your Timegate schedule administrator:** Points to the 'Questions' button (+ icon).
- Enter date / scroll through dates (backwards and forwards):** Points to the date navigation controls (left arrow, date field '19/07/2021', right arrow, and calendar icon).

The diary view shows the following schedule:

Date	Day	Shift
19	Mon	
20	Tue	Quicks - Waterburyville (0007) Tue 08:30 to Tue 17:30
21	Wed	
22	Thu	Quicks - Waterburyville (0007) Thu 08:30 to Thu 17:30
23	Fri	
24	Sat	Quicks - Waterburyville (0007) Sat 08:30 to Sat 17:30
25	Sun	Quicks - Waterburyville (0007) Sun 08:00 to Sun 17:00

Available

When **Available** is selected, the following **Diary / Available to Work** screen is displayed:

The screenshot displays the 'Diary / Available to Work' interface. On the left, there is a form titled 'Please select the dates when you are available to work'. It includes fields for 'Start Date' (26/07/2021, 00:00) and 'Finish Date' (26/07/2021, 23:59), and a 'SUBMIT' button. On the right, the 'Diary' view shows a calendar for the week of 26/07/2021. The diary entries are:

- 26 Mon: OPS Available to Work (Mon 00:00 to Mon 23:59)
- 27 Tue: Quicks - Waterlooville (0007) (Tue 08:30 to Tue 17:30)
- 28 Wed: (No entry)
- 29 Thu: Quicks - Waterlooville (0007) (Thu 08:30 to Thu 17:30)
- 30 Fri: (No entry)
- 31 Sat: Quicks - Waterlooville (0007) (Sat 17:30 to Sun 02:30)
- 01 Sun: (No entry)

Select a **Start Date** (and time) and a **Finish Date** (and time). Once completed, select **Submit**. Your availability will display on your schedule in the Employee Portal. Your availability is visible for those searching to fill **Open Duties** in Timegate.

Confirm All

When **Confirm All** is selected, all duties that have been allocated to you, that haven't been previously been confirmed are confirmed. You can also do it individually in each duty. After **Confirm All** has been selected, the option is no longer available on the screen.

Work Search

When selected, **Work Search** enable you to search for open duties:

Diary / Work Search

Please tell us the dates and times you are available to work

Start Date

08/08/2021  00 ▾ 00 ▾

Finish Date

08/08/2021  23 ▾ 59 ▾

Distance

30 Miles ▾

SUBMIT

To undertake a search for work:

- Select a **Start Date** (and time) and a **Finish Date** (and time).
- Select the **Distance** you are willing to travel
- Select **Submit**.

Any available duties are shown:

Diary / Work Search / Results

8 August

Duty
Site [Redacted]
Start 08/08/2021 08:00
Finish 08/08/2021 17:00
REQUEST

For those items that you wish to apply for, select **Request**. You will then be presented with the details of the duty:

Duty	
Customer	Quinn Anthony
Site	Quinn - Intermediate
Address	The Street, Intermediate, PO Box
Slot	Slot 1
Shift Duration	09:00
Start	08/08/2021 08:00
Finish	08/08/2021 17:00
Distance	Unknown
Comments	<input type="text"/>
<input type="submit" value="SUBMIT"/>	

If required, add any **Comments** before accepting the request.

Select **Submit** to be considered for the duty.

A message informing you of your successful submission is shown. The duty will then be sent for approval in Timegate. You will receive a message and an email when completed. If approved, it will appear in the Employee Portal, where you will be able to confirm the duty.

Questions

To raise a duty query (question about a query), select **Questions**. From here:

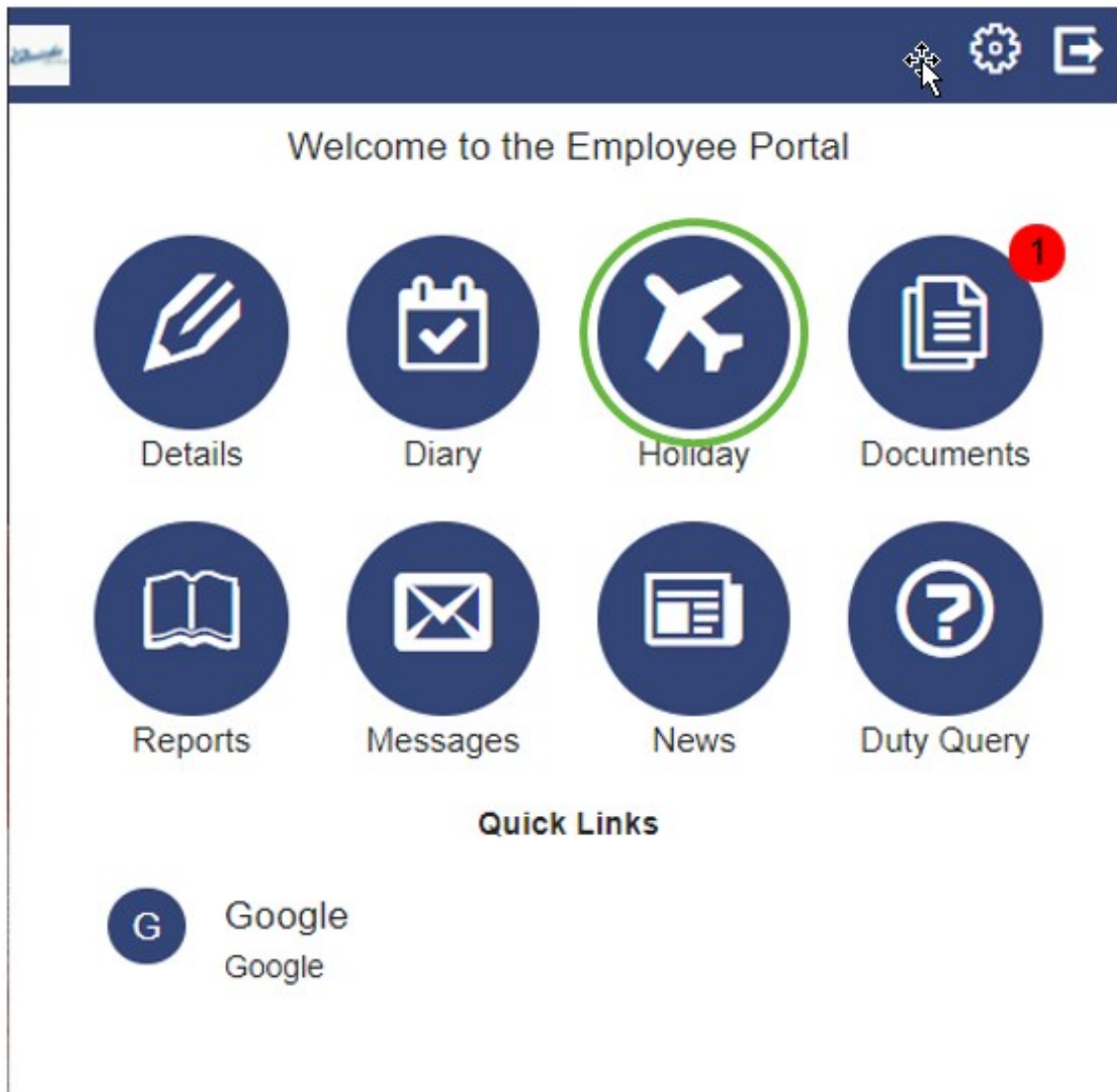
- Enter your question / query
- Select **Save**

You will then receive a message and email when your query has been actioned or answered.

How do I manage my holiday / annual leave using the Holiday Duty Task?

Accessing Holiday


You can manage your holiday / annual leave by selecting **Holiday** on the **Employee Portal** home screen:

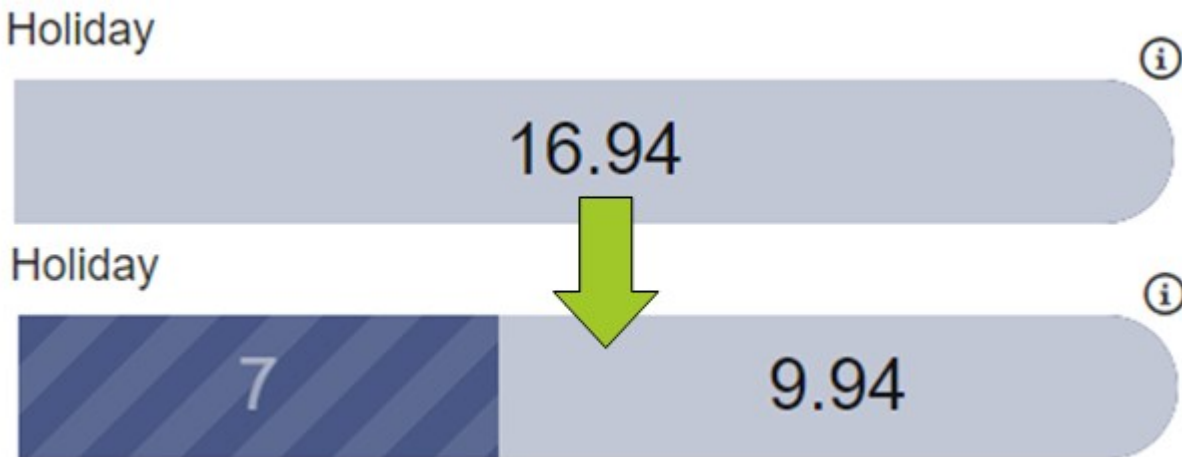


Holiday Screen

In the Holiday Screen, you will see your holiday entitlement and holiday dates, shown as both a graphic and in a detailed list. This includes **Approved**, **Requested** and **Remaining** holiday. You can view holiday for both **This Year** and **Next Year**. When viewing **This Year** and **Next Year** you can view the **Date** of the holiday, the **Requested** date, and **Status**.



Select the  icon to view the key for remaining holiday. As you request and have holiday approved, this bar will change to reflect this as shown in the example below where seven days of holiday have been requested:



Requesting Holiday

To request holiday, select Request to load the **Holiday / Holiday Request** screen:

The screenshot shows the 'Holiday / Request Holiday' form. At the top, there is a dark blue header with a gear icon and a right-pointing arrow icon. Below the header, the title 'Holiday / Request Holiday' is displayed. A message reads: 'Please enter the reason why you are taking the holiday and any additional information you feel relevant.' The form contains the following fields:

- Start Date:** A date picker showing '27/09/2021'. A callout box points to this field with the text 'Select / enter a holiday **Start Date**'.
- Finish Date:** A date picker showing '03/10/2021'. A callout box points to this field with the text 'Select / enter a holiday **End Date**'.
- Comments:** A text area containing 'Attending wedding.'. A callout box points to this field with the text 'Enter any supporting holiday details in **Comments**'.
- SAVE:** A dark blue button with the text 'SAVE' in white. A callout box points to this button with the text 'Select **Save** to submit request'.

Enter a **Start Date** and a **Finish Date** along with **Comments** to support your holiday request. Once completed select **Save**.

Once saved, **Successfully Submitted** is shown at the top of the screen. You will also see the holiday graphic change at the top of the screen and also the holiday details in the list below:

Successfully Submitted ×

Holiday (i)



- Request
- Questions

- This Year
- Next Year

Date	Requested	Status
27/09/2021 - 03/10/2021	7 Days	Requested

You will receive emails and messages in the Employee Portal as the request is approved/rejected in Timegate.

Raising a Question about Holidays

If you wish to ask a question about your holiday or entitlement:

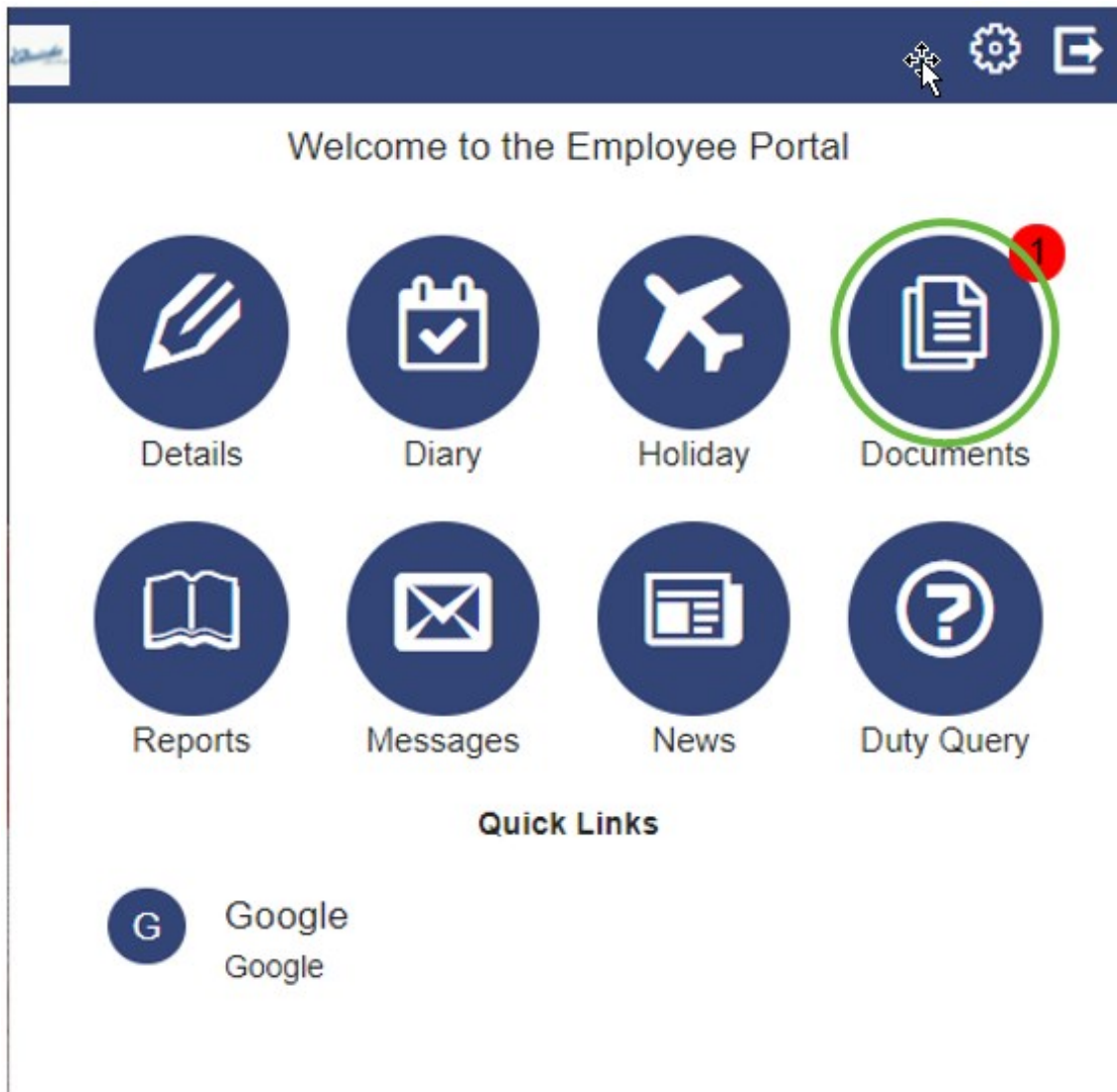
- Select **Questions**.
- This will open a **Holiday Question/Query** screen.
- Enter your question/query when prompted
- Select **Save** to submit.

You will then receive messages and emails when your question/query has been actioned/answered.

How do I view documents using the Documents Engagement Task?

Accessing Documents

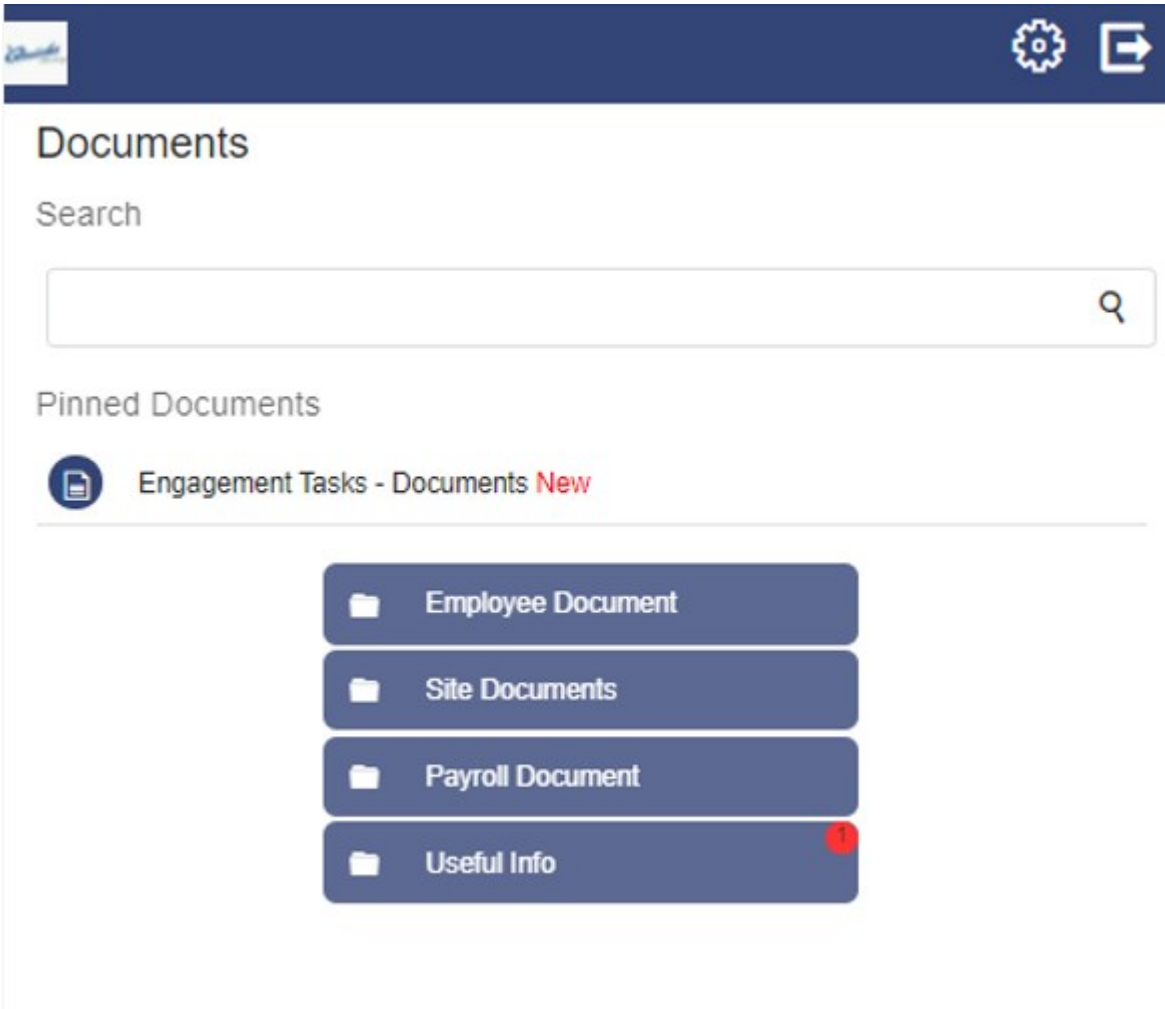
You can view your documents by selecting **Documents** on the Employee Portal home screen:



New documents are highlighted on the **Document** icon

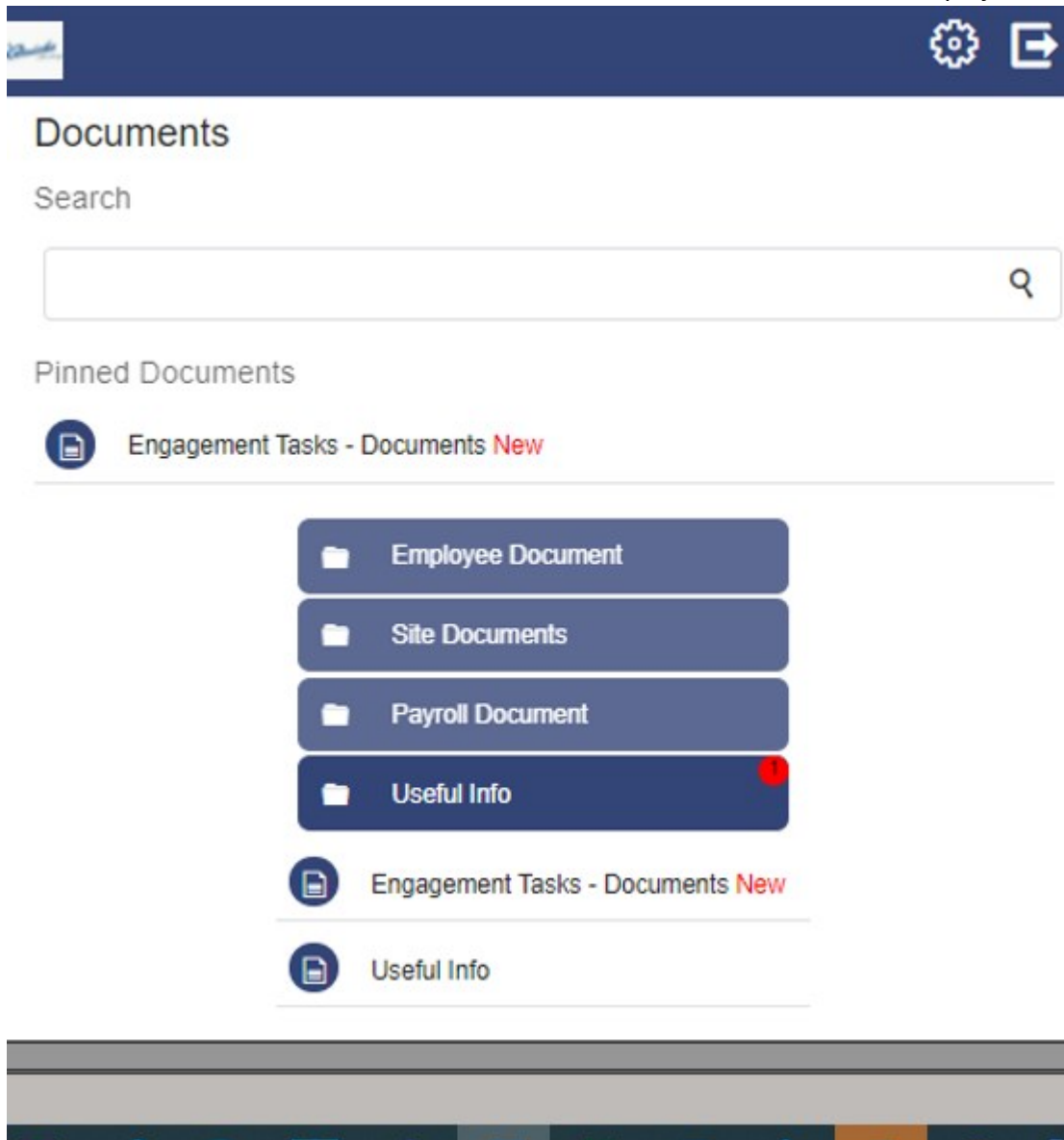
Viewing Documents

After selecting Documents, the Document screen loads. It comprises **Folders** and **Pinned Documents**:




- **Pinned Documents** shows those documents deemed important by your management. They are displayed at the top of the screen
- New documents are highlighted with a red circle on the relevant folder (as shown in "Useful Info" example above)
- Folders may have different names to those shown above. You may also see more or less folders as these are set up individually by your company within Timegate

- To access the documents, select the relevant folder. The documents will be displayed below the folder:

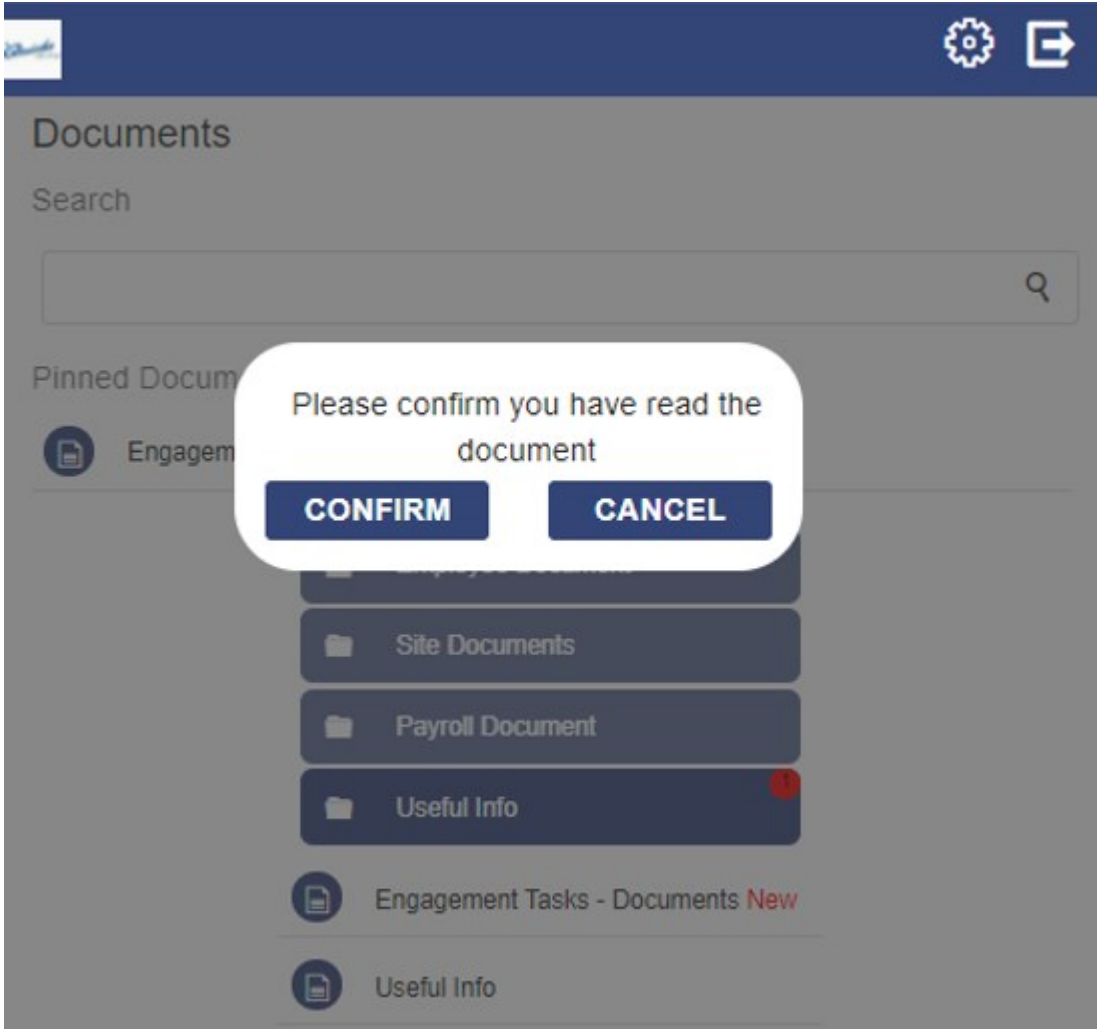


- Select the document to open or download it

 **Please Note:** Some documents may have a read receipt. If this is the case, when viewing you will be prompted to select

Confirmation of Reading

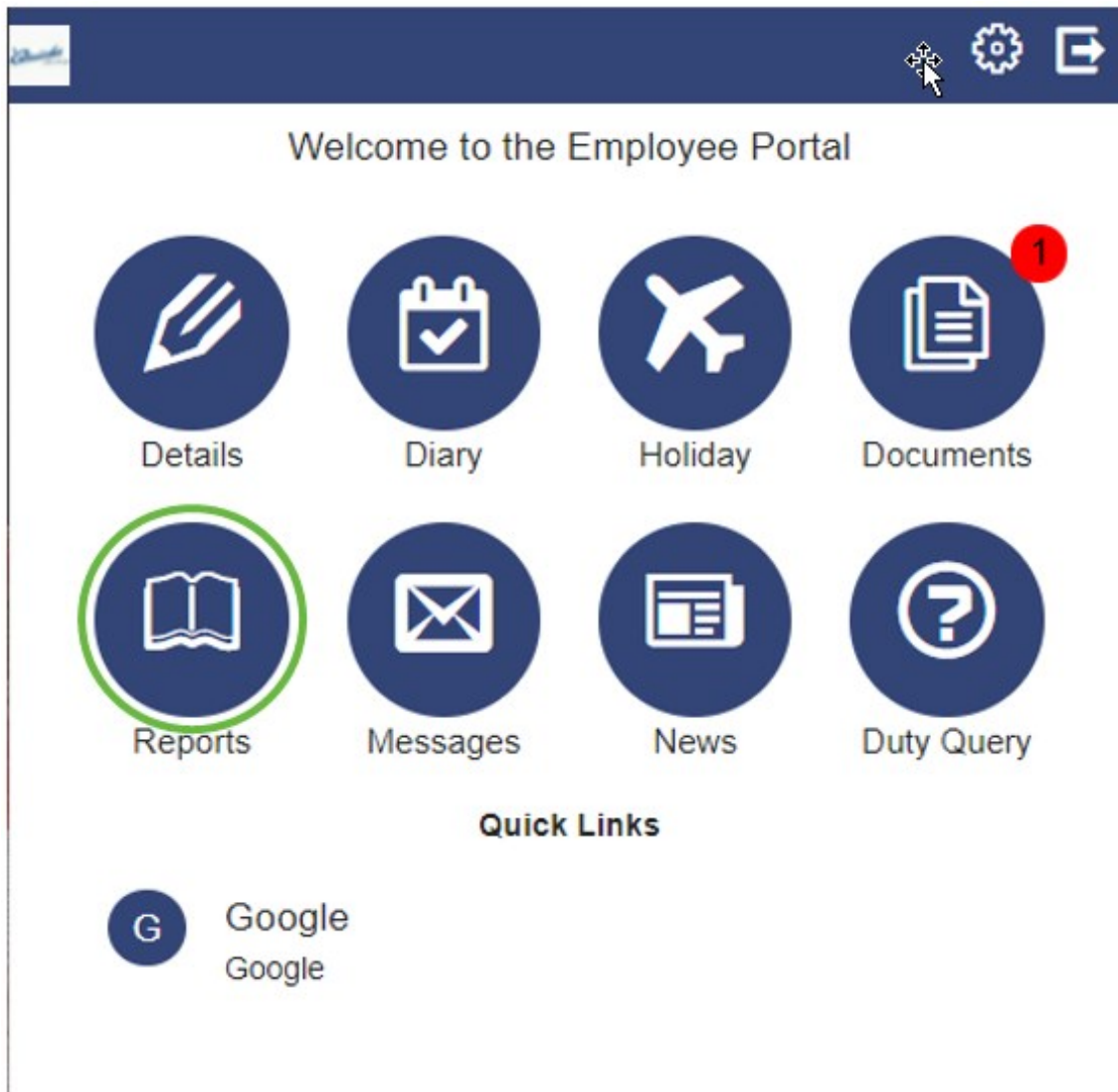
To confirm to your management that you have read a document, select Confirm:



How do I view reports using the Reports Engagement Task?

Accessing Reports

You can view various reports by selecting **Reports** on the **Employee Portal** home screen:



Report Types

There are three different report types. They are:

- **Employee Details** – A downloadable version of your details
- **Pay Details** – A downloadable duty report including pay for each duty
- **Employee Schedule** – A downloadable version of your schedule

Reports



Employee
Details



Pay Details



Employee
Schedule


Select a report icon to view it / display specific date range dialog boxes (as applicable).

Employee Details Report

After selecting **Employee Details** from the main Reports page of the Employee Portal, the report loads:

The screenshot shows the 'Reports / Details for' page. A green arrow points to the 'DOWNLOAD' button. A callout box says 'Select to view a downloadable version of the report'. Another callout box points to the three-dot menu icon in the browser window, saying 'Select to display menu options'. A third callout box points to the 'Print' option in the menu, saying 'Select to Print'. A fourth callout box points to the 'Save' option in the menu, saying 'Select to Save'.

Select **Download** to open a downloadable / printable version of the report.

When the report is loaded, select  to view the options menu. From here you are provided with a series of options, including **Save** and **Print**.


Pay Details Report

After selecting **Pay Details** from the main Reports page of the Employee Portal, you are prompted to specify a date range for the **Pay Details Report**. Select (or enter) a **Start** and **Finish** date.

Select **Create** to create and load the report.

The screenshot shows the 'Reports' page with three main options: Employee Details, Pay Details, and Employee Schedule. The 'Pay Details' option is selected. Below it, there is a form to 'Specify the date range for the pay details report' with date pickers for '05/07/2021' and '11/07/2021'. A green arrow points from the 'CREATE' button to the 'Reports / Pay Report for Robin Hood' page. This page has a 'DOWNLOAD' button and a table with columns: Site, DateID, Start, Finish, Hours/Shifts, Rate, and Total. A second green arrow points from the 'DOWNLOAD' button to the 'Reports / Pay Report for Robin Hood' page, which shows a table with columns: Site, DateID, Start, Finish, Hours/Shifts, Rate, and Total. Two callout boxes with green borders point to the date pickers in the first screenshot, each containing the text 'Select Start and Finish dates for the report'.

Select **Download** to open a downloadable / printable version of the pay report.

When the report is loaded, select  to view the options menu. From here you are provided with a series of options, including **Save** and **Print**.


Employee Schedule Report

After selecting **Employee Schedule** from the main Reports page of the Employee Portal, you are prompted to specify a date range for the **Employee Schedule Report**. Select (or enter) a **Start** and **Finish** date.

Select **Create** to create and load the report.

The screenshot shows the 'Reports' page with three main options: Employee Details, Pay Details, and Employee Schedule. The 'Employee Schedule' option is selected. Below it, there is a form to 'Specify the date range for the employee schedule report' with date pickers for '05/07/2021' and '11/07/2021'. A green arrow points from the 'CREATE' button to the 'Reports / Employee Schedule for Robin Hood' page. This page has a 'DOWNLOAD' button and a table with columns: Location, Start Day, Scheduled Start, Scheduled Finish, and Work Hours Total. A second green arrow points from the 'DOWNLOAD' button to the 'Reports / Employee Schedule for Robin Hood' page, which shows a table with columns: Site, Location, Start Day, Scheduled Start, Scheduled Finish, and Work Hours Total.

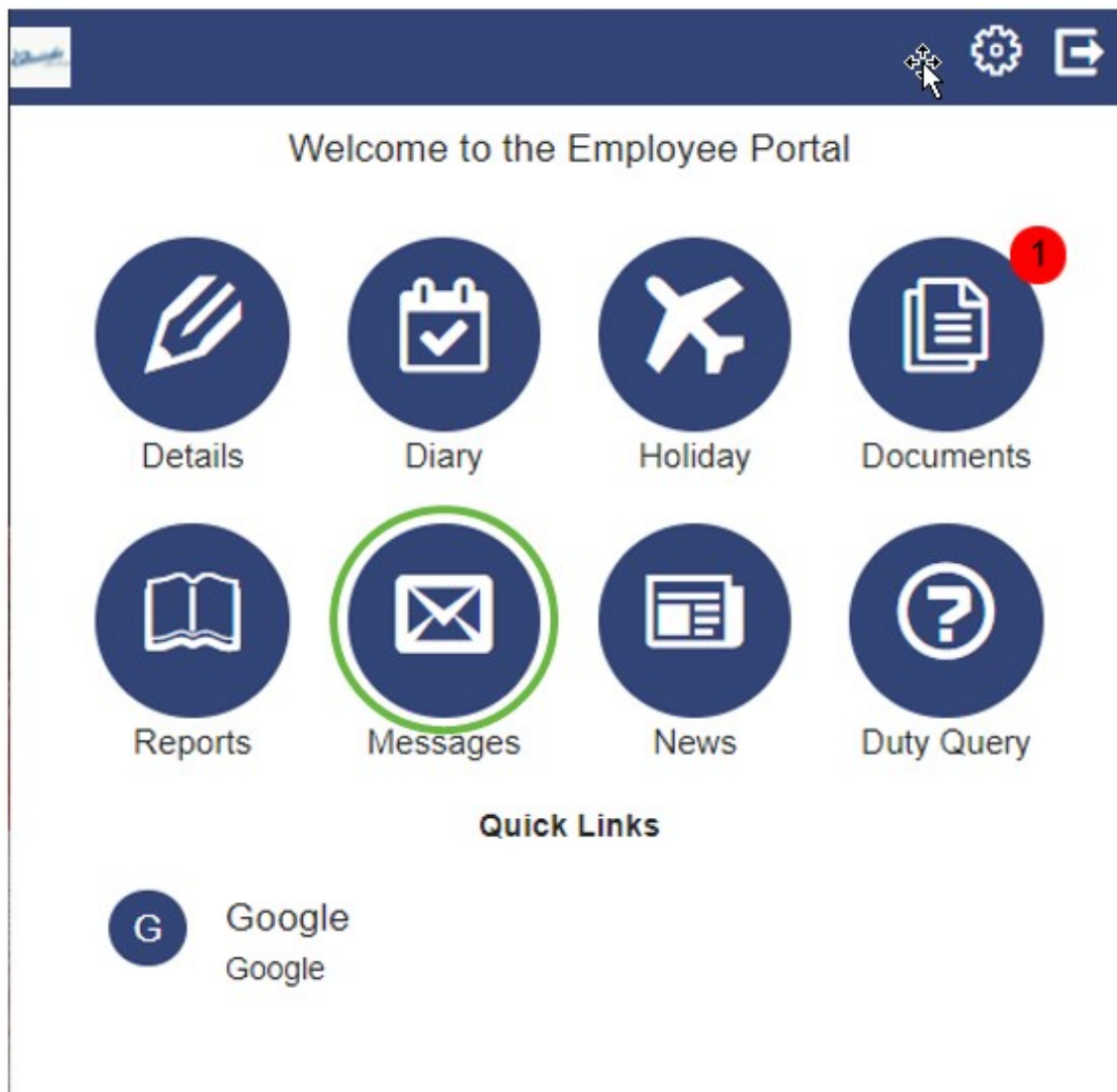
Select **Download** to open a downloadable / printable version of the schedule report.

When the report is loaded, select  to view the options menu. From here you are provided with a series of options, including **Save** and **Print**.

How do I manage my messages using the Messages Engagement Task?

Accessing Messages

You can manage your messages by selecting **Messages** on the **Employee Portal** home screen:



Viewing messages

After selecting **Messages**, you will see a list of messages received:




Messages

+ New

	26/07/2021	Holiday Request - Approved
	23/07/2021	Search For Work - Completed
	21/07/2021	Duty Give Away - Completed
	21/07/2021	Duty Give Away - Not Approved
	21/07/2021	Duty Give Away - Completed
	21/07/2021	Duty Give Away - Completed
	21/07/2021	Duty Give Away - Completed
	21/07/2021	Duty Give Away - Not Approved
	15/07/2021	Holiday Request - Approved
	14/07/2021	Duty Give Away - Cancelled
	14/07/2021	Duty Give Away - Cancelled
	13/07/2021	Duty Swap - Completed
	13/07/2021	Duty Swap - Completed
	02/07/2021	Holiday Request - Approved

Select any message to see the content:

Messages / Details

 Remove

Date

26/07/2021

Type

Holiday Request

Start Date

27/09/2021

Finish Date

03/10/2021

Comments

Attending Son's wedding.

Manager Comments

Updated Date

26/07/2021

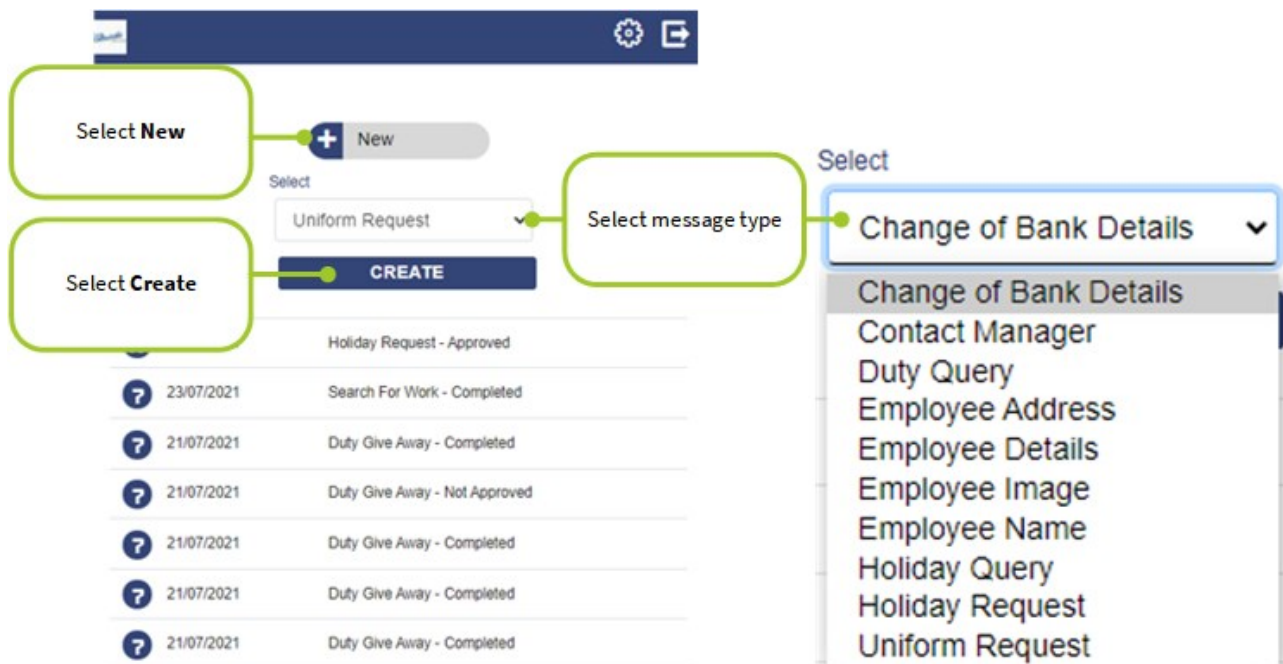
Status

Approved

Delete a message

Once in the message you can select **Remove** to delete a message

Send a message



The screenshot shows the 'Send a message' interface. At the top, there is a '+ New' button. Below it is a 'Select' dropdown menu currently showing 'Uniform Request'. To the right of this dropdown is a 'Select message type' dropdown menu, which is currently open and showing 'Change of Bank Details'. Below these are two buttons: 'CREATE' and 'SEND'. The main area displays a list of messages with columns for date and type. The list includes:

Date	Type
23/07/2021	Search For Work - Completed
21/07/2021	Duty Give Away - Completed
21/07/2021	Duty Give Away - Not Approved
21/07/2021	Duty Give Away - Completed
21/07/2021	Duty Give Away - Completed
21/07/2021	Duty Give Away - Completed
21/07/2021	Duty Give Away - Completed

- From the message list, select **New**. This will open a list of message types that you can send.
- Select the message type from the drop down
- Select **Create**. Your chosen question/query message template opens (in this example a **Uniform Request**:



Messages / Uniform Request

Please specify what you require including sizes and reason for the request.

Comments

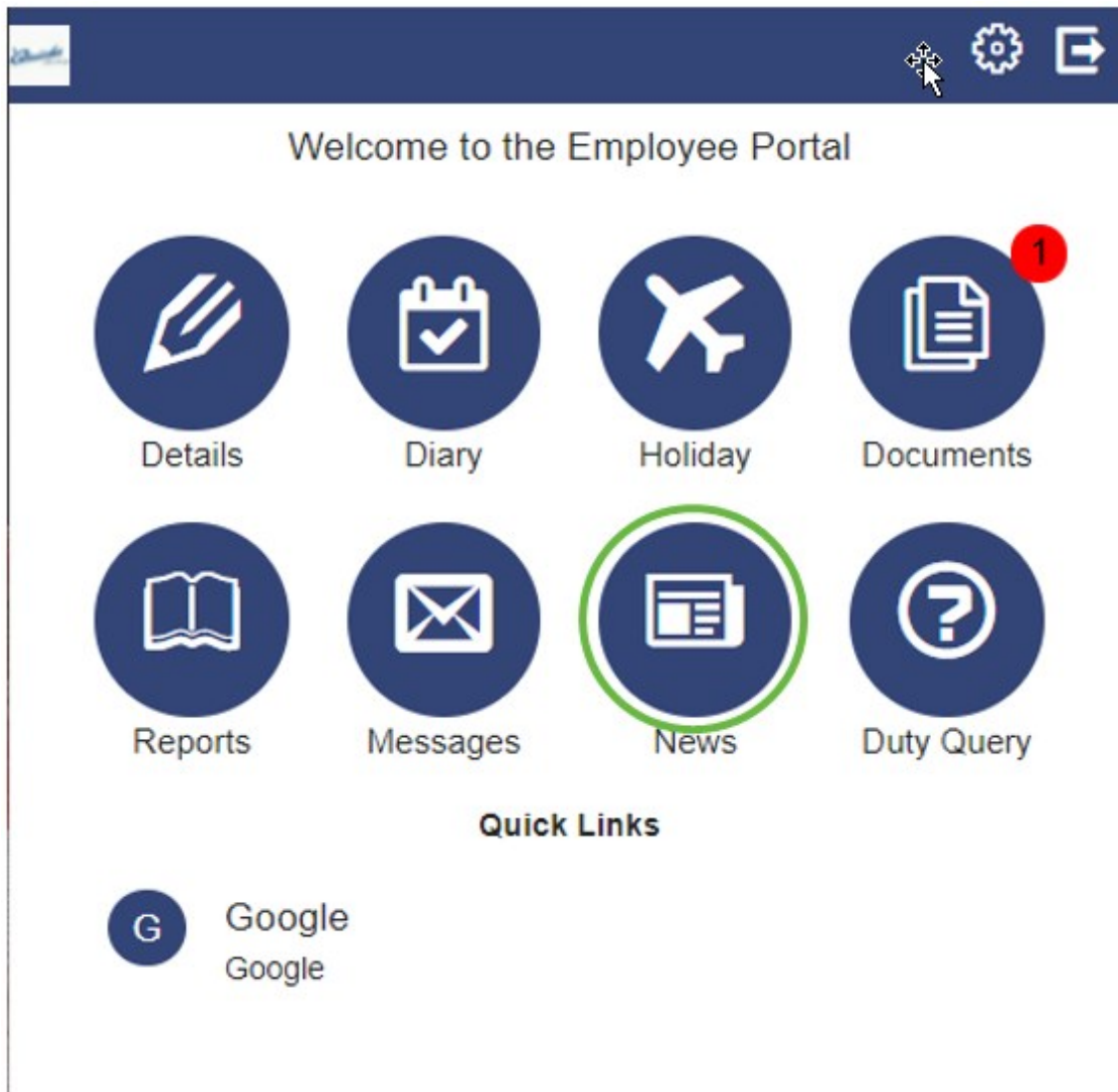
SAVE

- Follow the guidance displayed as necessary. Enter your message in the **Comments** area
- Select **Save**. You will receive messages and emails when your question/query has been actioned/answered.

How do I view news using the News Engagement Task?

Accessing News

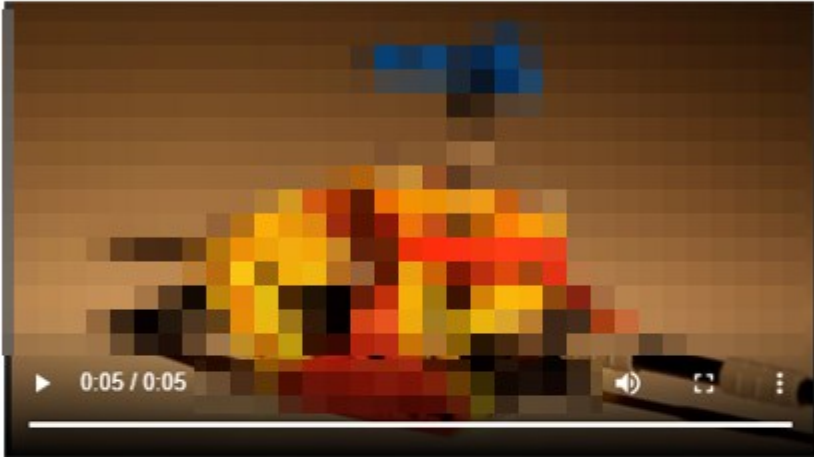
You can view your company's latest news by selecting **News** on the **Employee Portal** home screen:



You may also see **News** items displayed on the Home Page as shown in this example:

Welcome to the Employee Portal

Latest News
latest news



Grid of icons: Details, Diary, Holiday, Documents (with red '1'), Reports, Messages, News (with red '1'), Duty Query

Quick Links

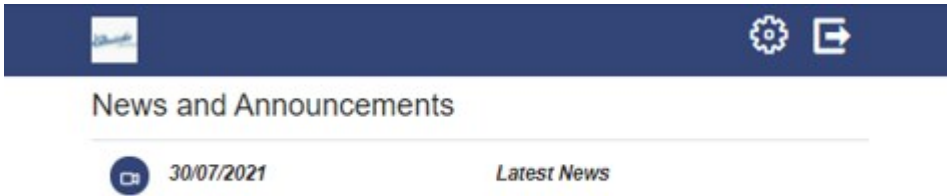
G Google
Google

Either select the **News banner** or **News icon** to view **News and Announcements**.

Selecting the banner will take you to the specific article. Selecting the icon will take you to the full **News and Announcements** page.

Viewing the news

From the **News and Announcements** page select the item you wish to view:



If the news item includes a video clip. select the play button to view the clip:

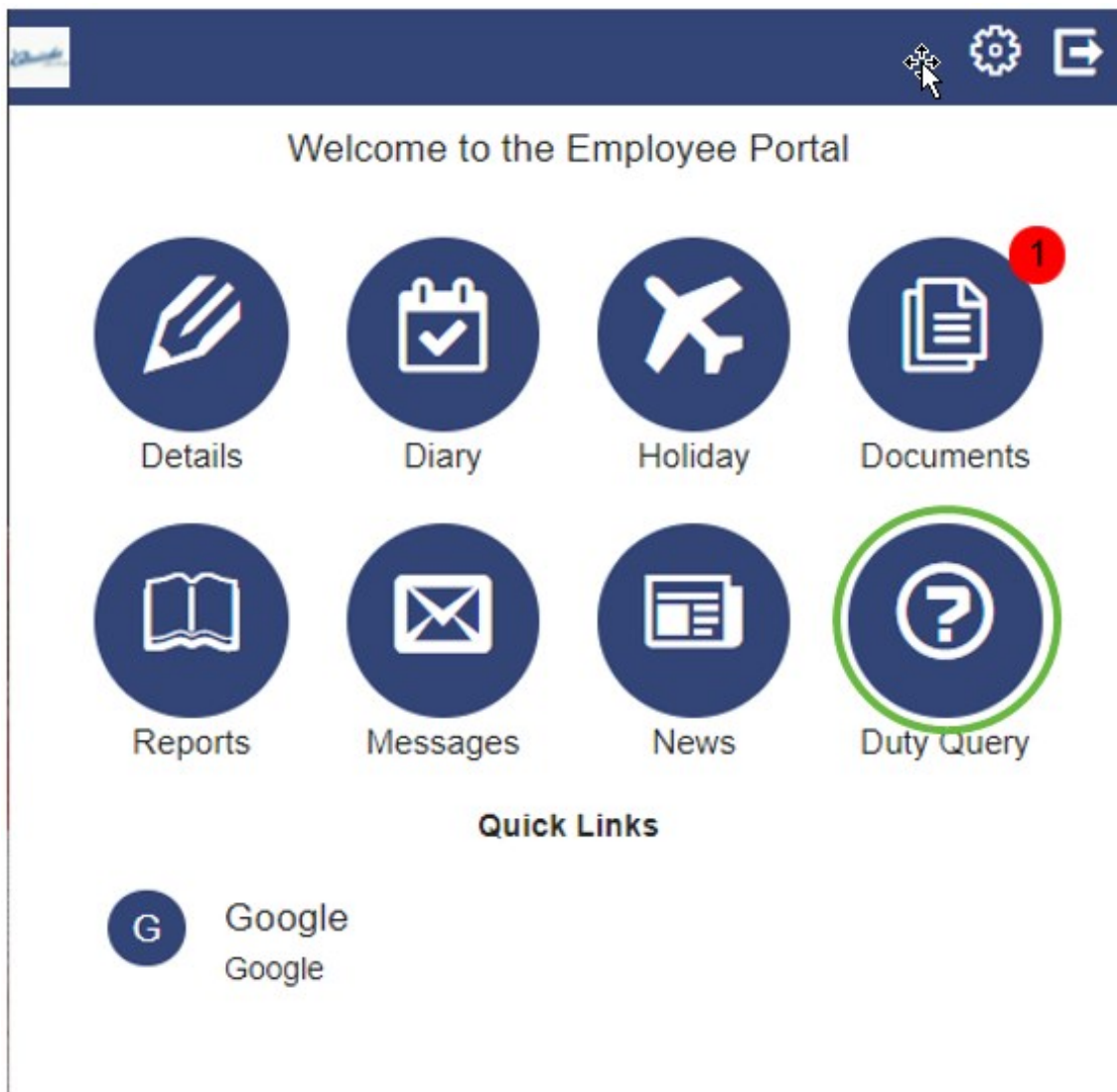


Latest News. More to follow.....

How do I query a duty using the Duty Query Engagement Task?

Accessing Duty Query

You can query a duty by selecting **Duty Query** on the **Employee Portal** home screen:



Making and submitting your Duty Query

After selecting **Duty Query**, the following screen loads:



Diary / Duty Question

Please enter as much information about your duty query as possible

Comments

SAVE

Enter your diary/duty question in the **Comments** space.

Select **Save** to submit your question.

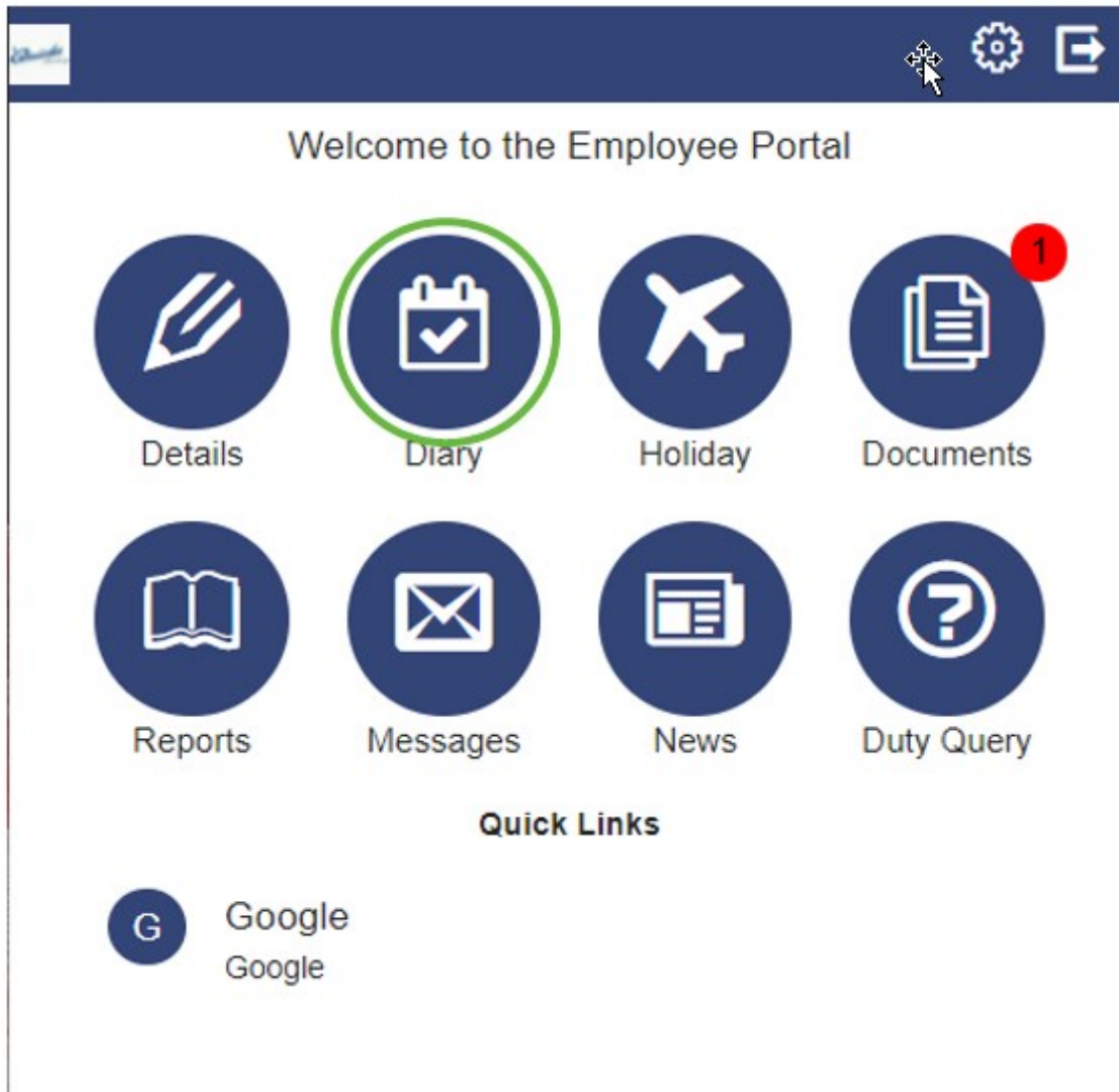
You will receive messages and emails when your question/query has been actioned/answered.

How do I swap a duty in the Employee Portal?



Please Note: Before applying for a duty swap you need to identify the employee and duty that you wish to swap with/into

To swap a duty, first you must locate it within your diary. Select **Diary** on the Employee Portal home screen:



A screen similar to the following will open:

Diary

Available Work Search

Questions

< 26/07/2021 [Calendar Icon] >

26	Mon	
27	Tue	Tue 08:30 to Tue 17:30
28	Wed	Wed 08:30 to Wed 17:30
29	Thu	Thu 08:30 to Thu 17:30
30	Fri	Fri 08:30 to Fri 17:30
31	Sat	Sat 08:30 to Sat 17:30
01	Sun	

Select the duty you wish to swap out of. A screen similar to the following loads:

Diary / Duty Detail

General Details

Site

[Redacted]

Customer

[Redacted]

Post

Duty ID

9901

Duty Confirmed



After opening the duty in the **Diary/Duty Detail** view select **Swap** to load the **Diary / Duty Detail / Duty Swap** screen:

Diary / Duty Detail / Duty Swap

Prior to swapping shift:

Please speak to your colleagues and identify the potential swap as you will need their details to enter onto the Swap duty form.

Duty
Site ██████████
Scheduled 31/07/2021 08:30 31/07/2021 17:30
Hour Type REG (Regular Contracted)
Pay Level SO (Security Officer)

First Name

Last Name

Email

Mobile

Expected Date

SEARCH

Complete the **First Name**, **Last Name**, **Expected Date** and **Time**. Optionally, also include **Email** and **Mobile** details.

Select **Search** (loads a confirmation screen):

Prior to swapping shift:
Please speak to your colleagues and identify the potential swap as you will need their details to enter onto the Swap duty form.

Duty

Site
[Redacted]

Scheduled
31/07/2021 08:30
31/07/2021 17:30

Hour Type
REG (Regular Contracted)

Pay Level
SO (Security Officer)

Duty


Site
[Redacted]

Scheduled
31/07/2021 17:30
01/08/2021 02:30

Employee
[Redacted]

CONFIRM **NEW SEARCH**

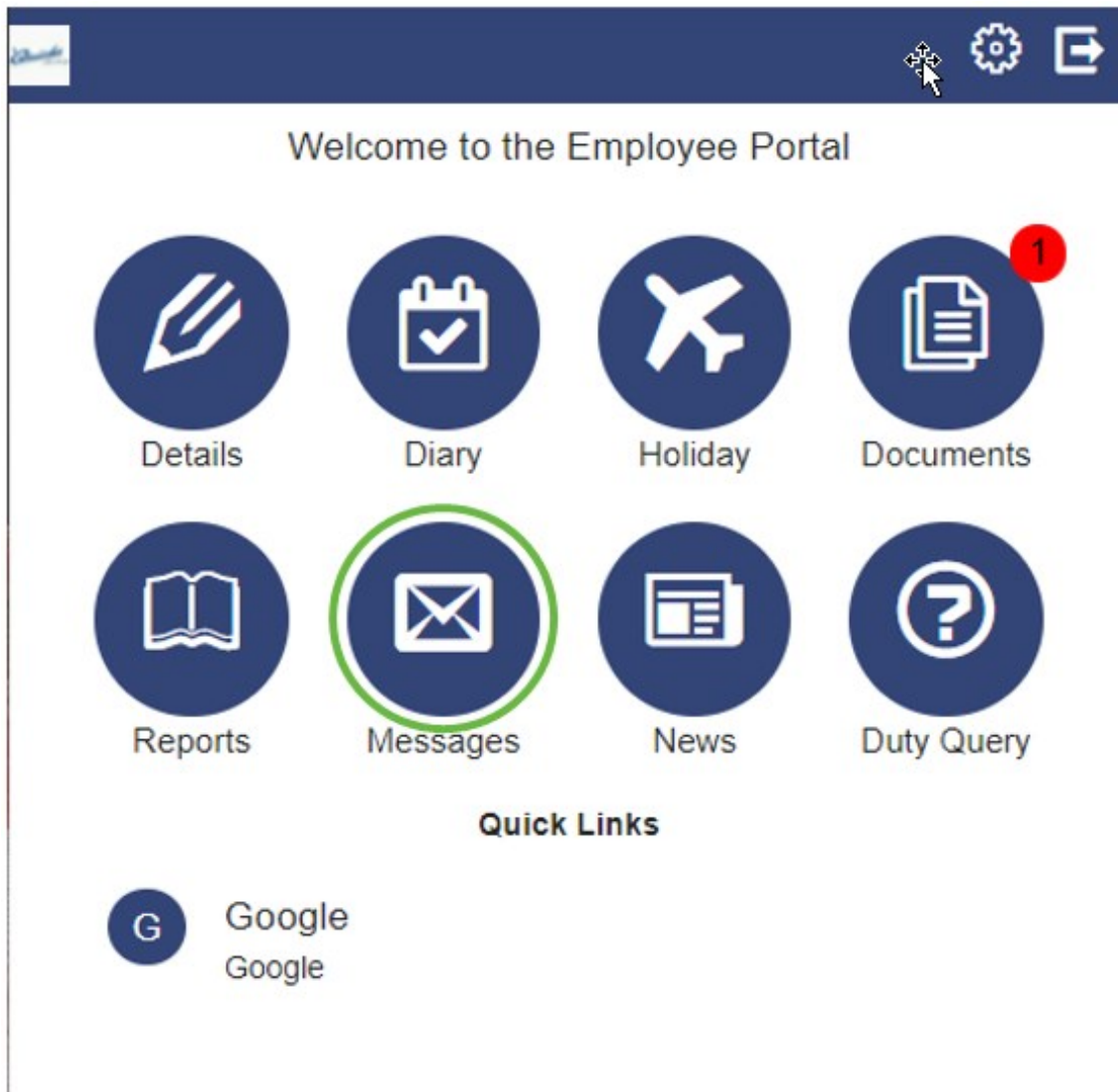
Select **Confirm** to initiate the duty swap. The **Duty Swap Request** is sent to the employee you wish to swap with. It is also sent to the relevant person in your company who will approve/reject the duty swap.

 **Please Note:** The other employee needs to approve the duty swap prior to your manager/supervisor approving/rejecting the duty.

You will receive messages in the Employee Portal throughout the duty swap process. If successful, and approved, you will receive a message and see that your duty has changed in your diary.

How do I accept a duty swap in the Employee Portal?

When a duty swap request is made, you will receive a message where you can accept or reject the swap offer. Select **Messages** on the **Employee Portal** home screen to view your messages:



The **Messages** screen opens ready to locate the message and accept/reject it:



- Select the **Duty Swap** message to view it
- Select **Accept** to accept the duty. If you decide not to accept the duty, select **Reject**

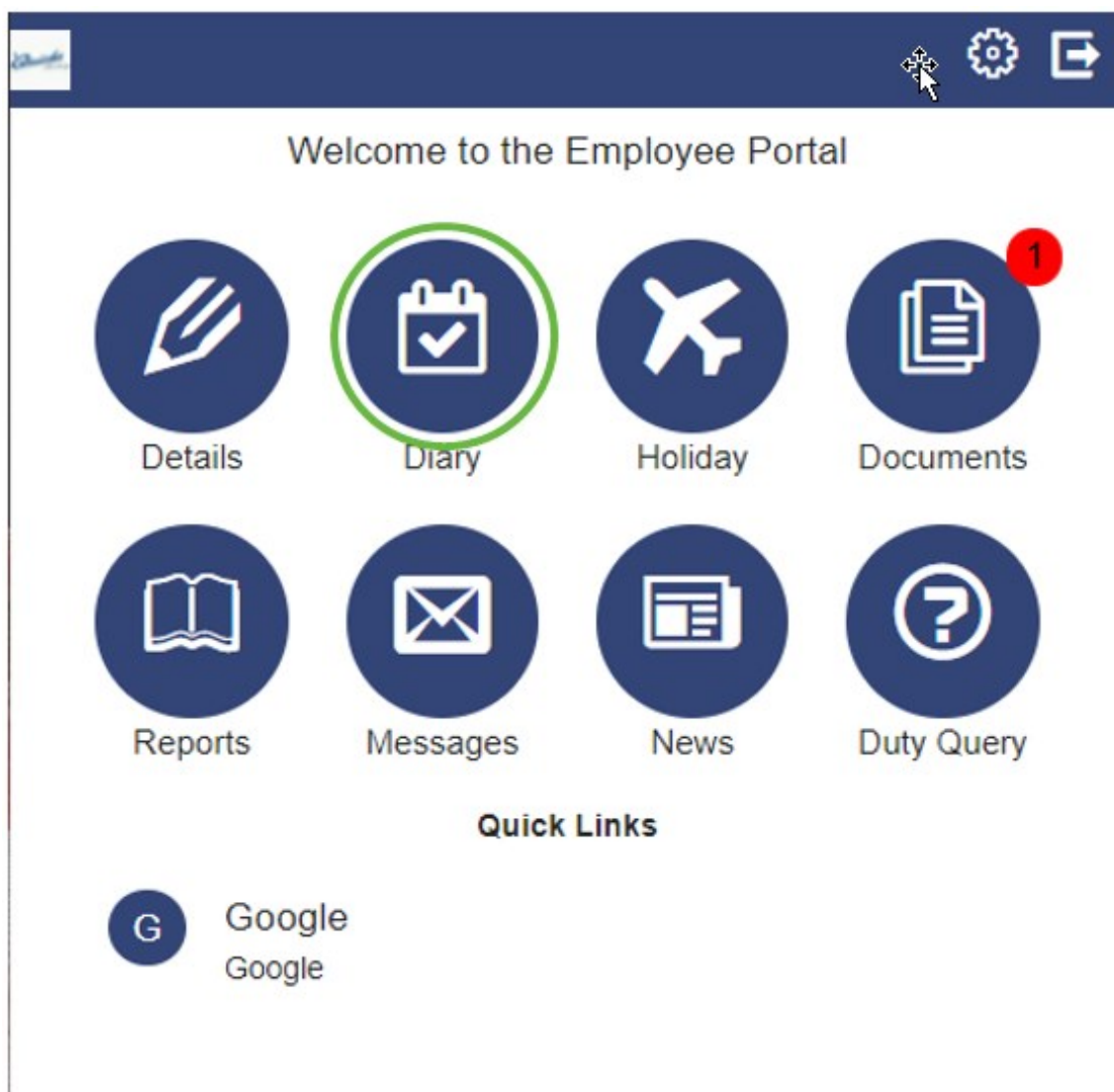
- Once you have accepted or rejected the message, you will see the status of the swap change. Additionally, a **Successfully Submitted** message is displayed at the top of the page.



Please Note: You will receive messages in the Employee Portal throughout the process. If successful, and approval has been completed, you will receive a message to notify you. Your duty will also change in the diary.

How do I give away a duty in the Employee Portal?


To give away a duty, first you must locate it within your diary. Select **Diary** on the Employee Portal home screen:



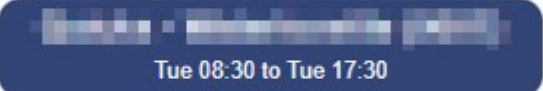

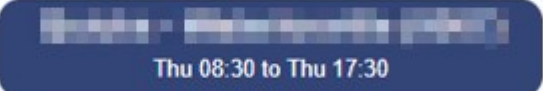
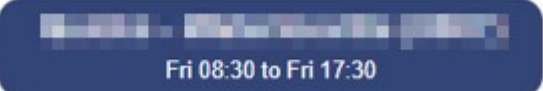
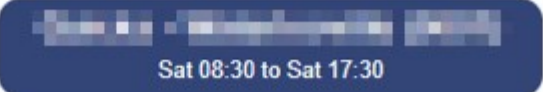
A screen similar to the following will open:

Diary

 Available  Work Search

 Questions

◀ 26/07/2021  ▶

- 26
Mon
- 27
Tue  Tue 08:30 to Tue 17:30
- 28
Wed  Wed 08:30 to Wed 17:30
- 29
Thu  Thu 08:30 to Thu 17:30
- 30
Fri  Fri 08:30 to Fri 17:30
- 31
Sat  Sat 08:30 to Sat 17:30
- 01
Sun

Select the duty you wish to swap out of. A screen similar to the following loads:

Diary / Duty Detail

Questions Swap Give Away

General Details

Site
[Redacted]

Customer
[Redacted]

Post

Duty ID
10067

Duty Confirmed
✓

Address

Sin
0007

Please follow this link to view the site map

Notes

There are no site instructions available.

After opening the duty in the **Diary/Duty Detail** view select **Give Away**. At the top of the Employee Portal the **Successfully Submitted** message will be displayed:

Successfully Submitted


Diary

- Available
- Work Search
- Questions

12/07/2021

12	Mon	
13	Tue	Tue 08:30 to Tue 17:30
14	Wed	Wed 08:30 to Wed 17:30
15	Thu	Thu 08:30 to Thu 17:30
16	Fri	Fri 08:30 to Fri 17:30
17	Sat	Sat 08:30 to Sat 17:30
18	Sun	

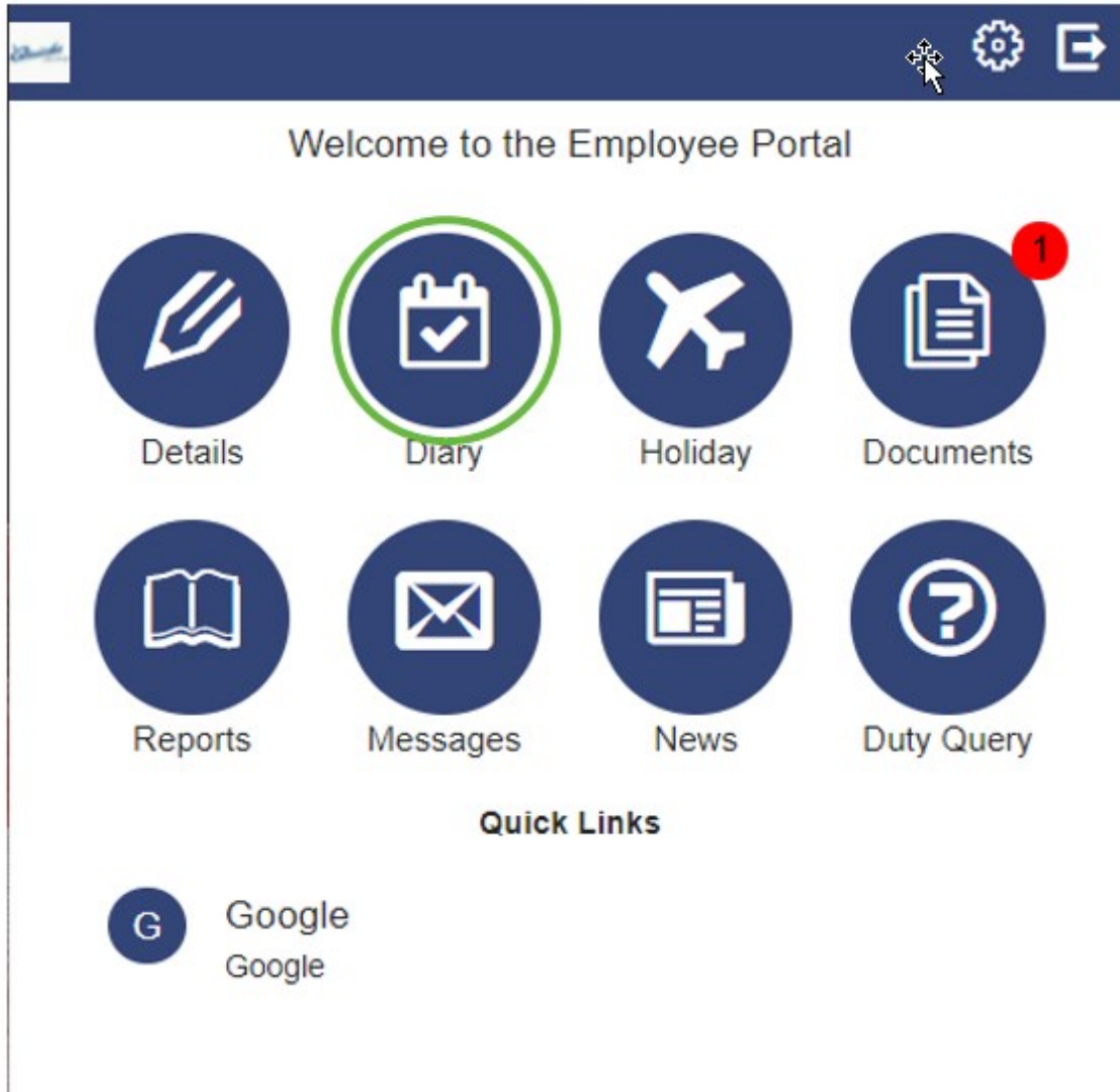
The Duty Give Away request has now been send out to all employees. They will see it as available when they do a Work Search. Once a fellow employee agrees to undertake the duty, a task will go to the relevant person in your company (i.e. your manager / supervisor / scheduler) who will approve/reject the duty change.

 **Please Note:** Another employee needs to agree to **Pick Up** the shift prior to the appropriate person putting final approval/rection onto the duty change. Until the change has been approved you are committed to working the shift.

You will receive messages in the Employee Portal throughout the process. If successful, and an approval has been given, you will receive a message confirming the give away. You will also be able to see that the duty has changed in your diary.


How do I search for work and pick up a duty in the Employee Portal?

In the Employee Portal an employee can carry out a **Work Search** to see any available duties. The duties that they will see include those that have been entered as a **Duty Give Away**. To carry out a **Work Search**, first you must open your diary. Select **Diary** on the Employee Portal home screen:



A screen similar to the following will open:

 Available  Work Search

 Questions

◀ 26/07/2021  ▶

26

Mon

27

Tue

Tue 08:30 to Tue 17:30

28

Wed

Wed 08:30 to Wed 17:30

29

Thu

Thu 08:30 to Thu 17:30

30

Fri

Fri 08:30 to Fri 17:30

31

Sat

Sat 08:30 to Sat 17:30

01

Sun

Select **Work Search**. This opens the screen where you can search for open duties:

Please tell us the dates and times you are available to work

Start Date

08/08/2021 [calendar icon] 00 [dropdown] 00 [dropdown]

Finish Date

08/08/2021 [calendar icon] 23 [dropdown] 59 [dropdown]

Distance

30 Miles [dropdown arrow]

SUBMIT

To undertake a search for work:

- Select a **Start Date** (and time) and a **Finish Date** (and time).
- Select the **Distance** you are willing to travel
- Select **Submit**.

Any available duties are shown:

8 August

Duty

Site
[blurred text]

Start
08/08/2021 08:00

Finish
08/08/2021 17:00

REQUEST

For those items that you wish to apply for, select **Request**. You will then be presented with the details of the duty:

Duty	
Customer	Quinn Anthony
Site	Quinn - Intermediate
Address	The Street, Intermediate, PO Box 248
Slot	Slot 1
Shift Duration	09:00
Start	08/08/2021 08:00
Finish	08/08/2021 17:00
Distance	Unknown
Comments	<input type="text"/>
<input type="submit" value="SUBMIT"/>	

If required, add any **Comments** before accepting the request.

Select **Submit** to be considered for the duty.

If your requested duty is part of another employee **Giving Away** their shift, you will receive messages in the Employee Portal throughout the process. You will receive messages titled Duty Pick Up. If successful, and approval has been completed, you will receive a message and see that your duty has changed in the diary.