TEAM Software
by WORKWAVE

Help Desk Tasks User Guide

05 October 2021 (Version 21.4)

COMMERCIAL STATEMENT

This document is subject to any terms as per teamsoftware.com/legal.

TABLE OF CONTENTS

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.

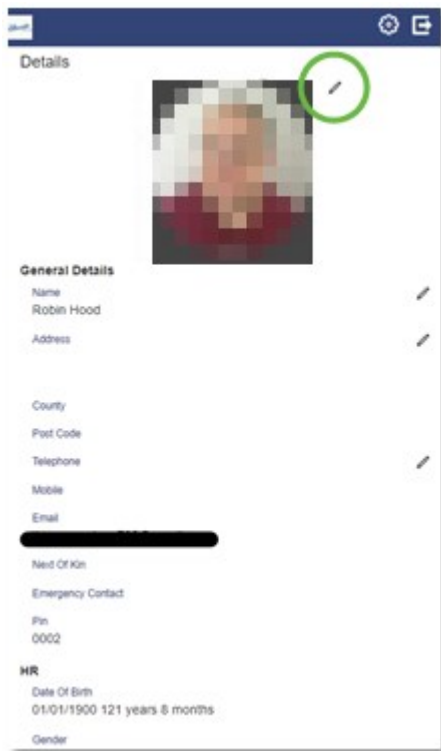## How do I update my details using the Details Engagement Task?

Accessing Details

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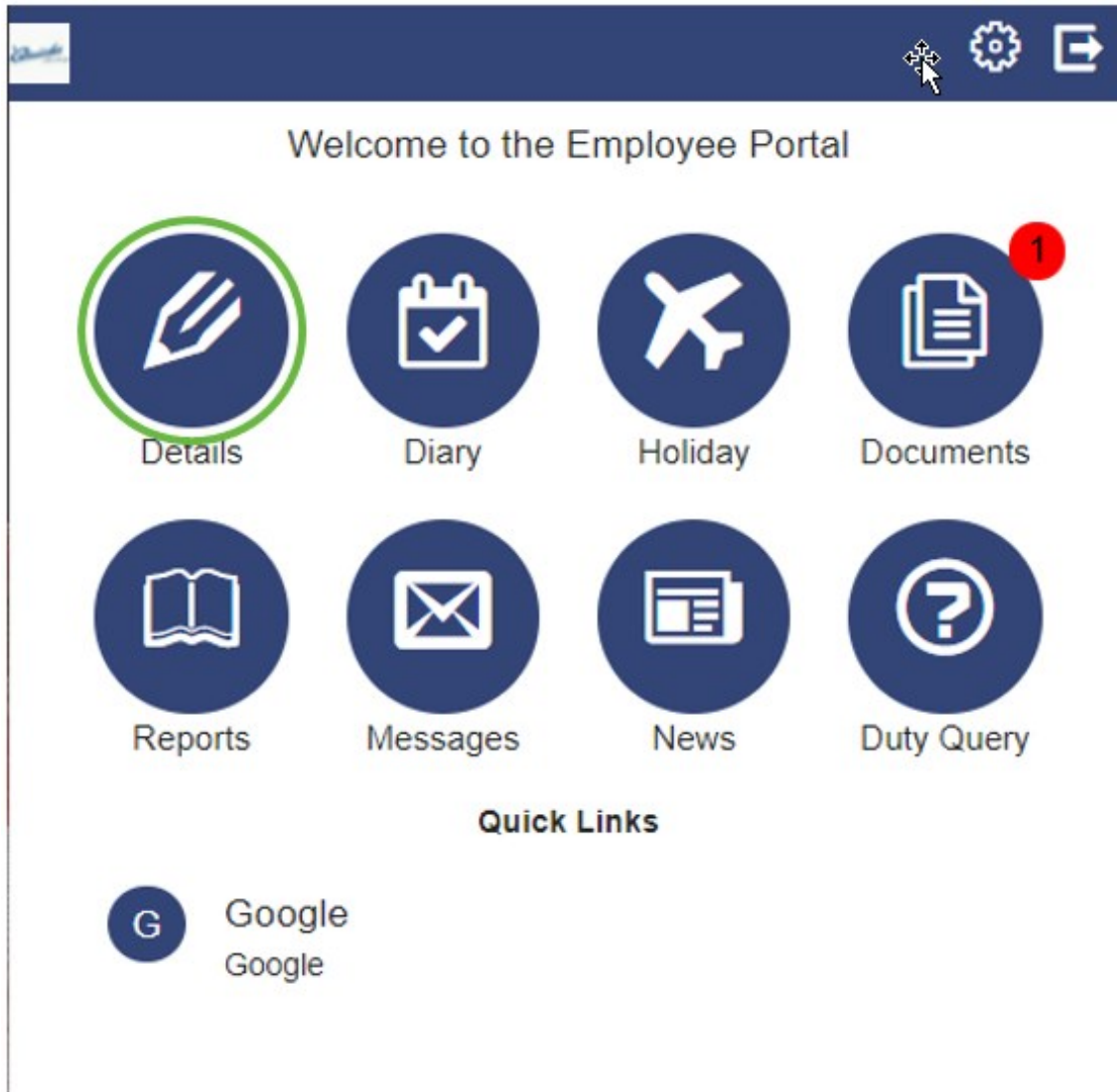
Updating / Editing Details

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)
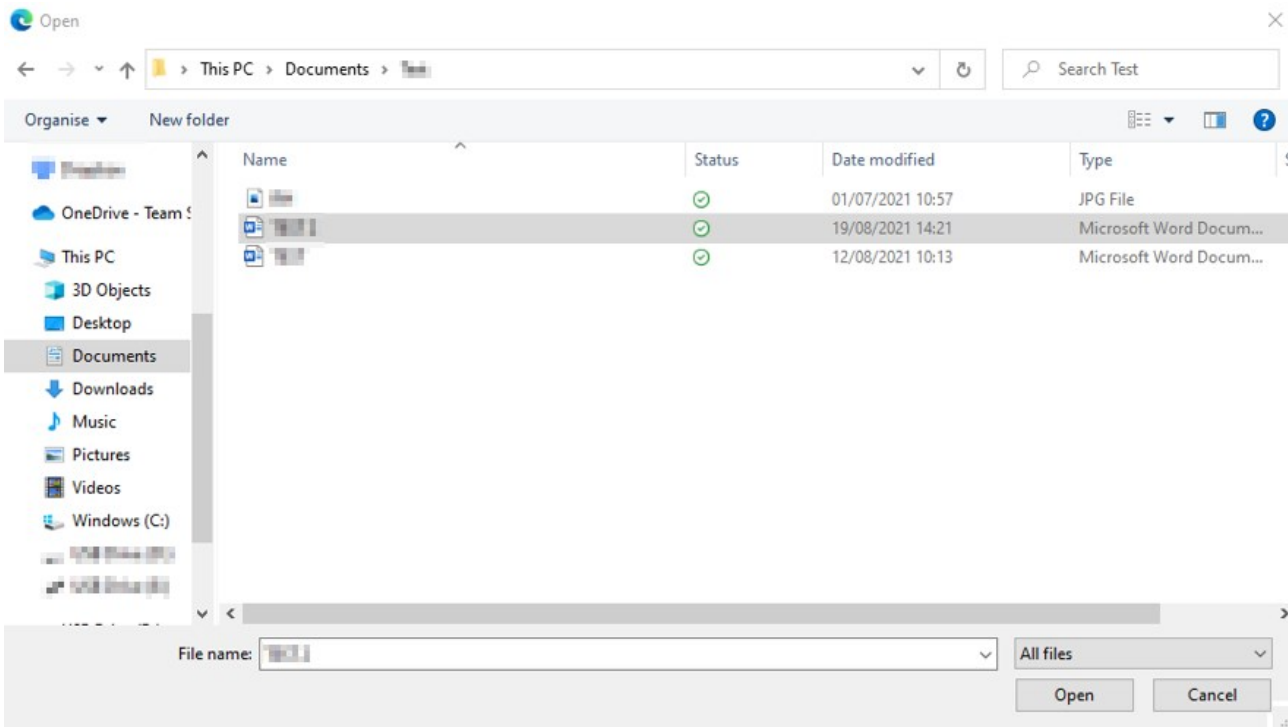
Uploading a Document

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

To upload a file select **Browse**

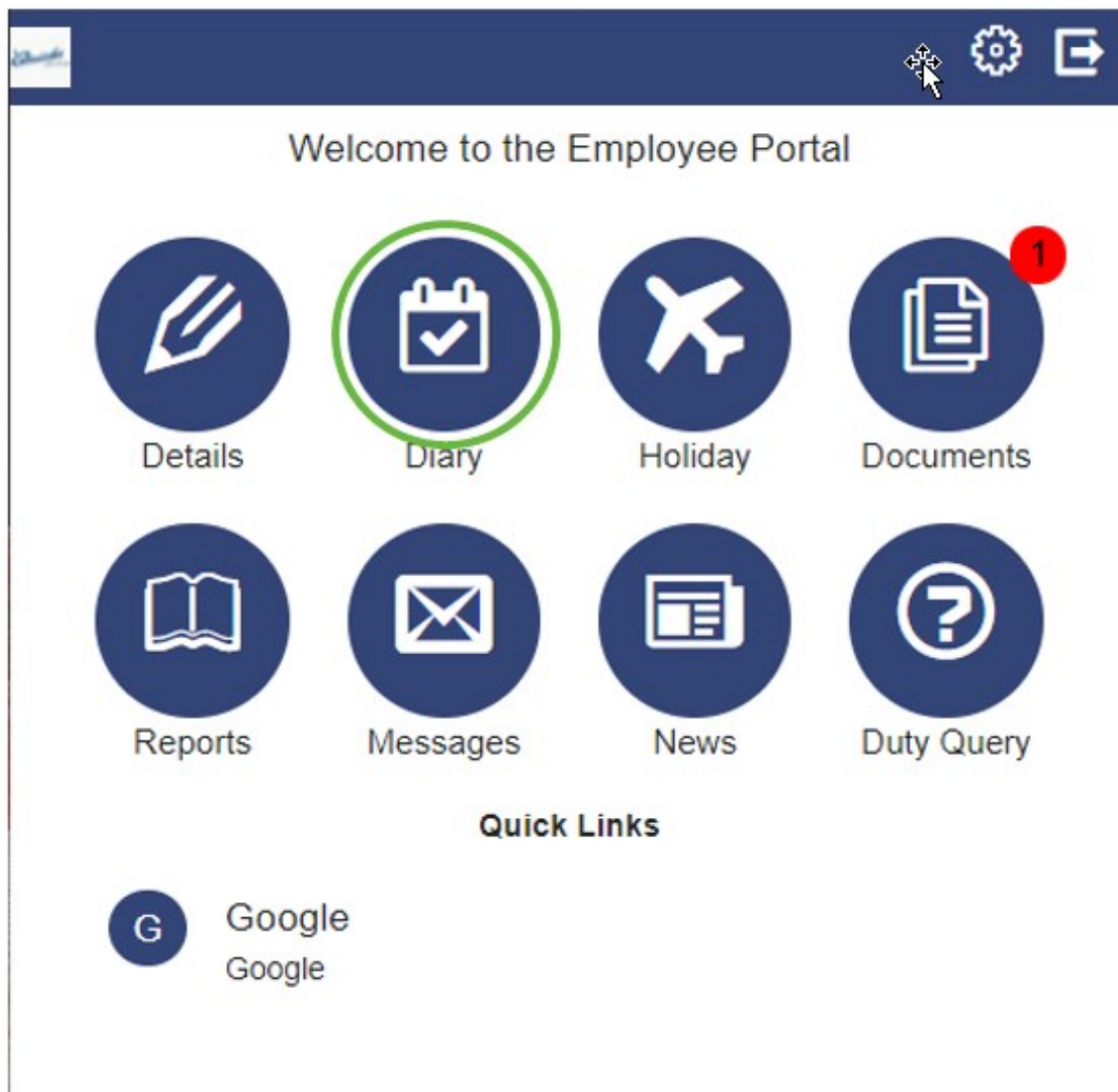When prompted, select your file as shown and then select **Open**

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:

Available

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

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:

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:

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

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:
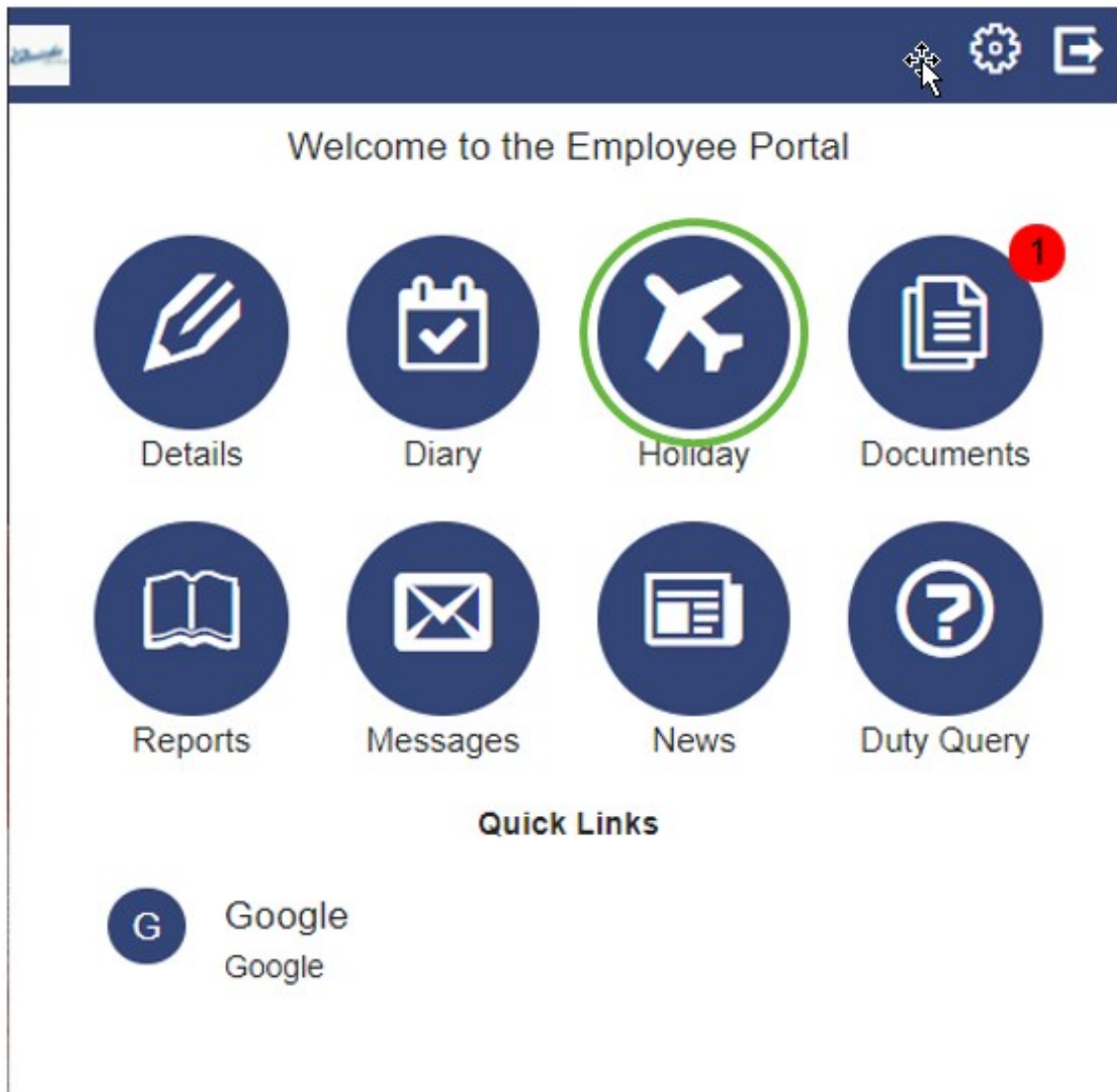
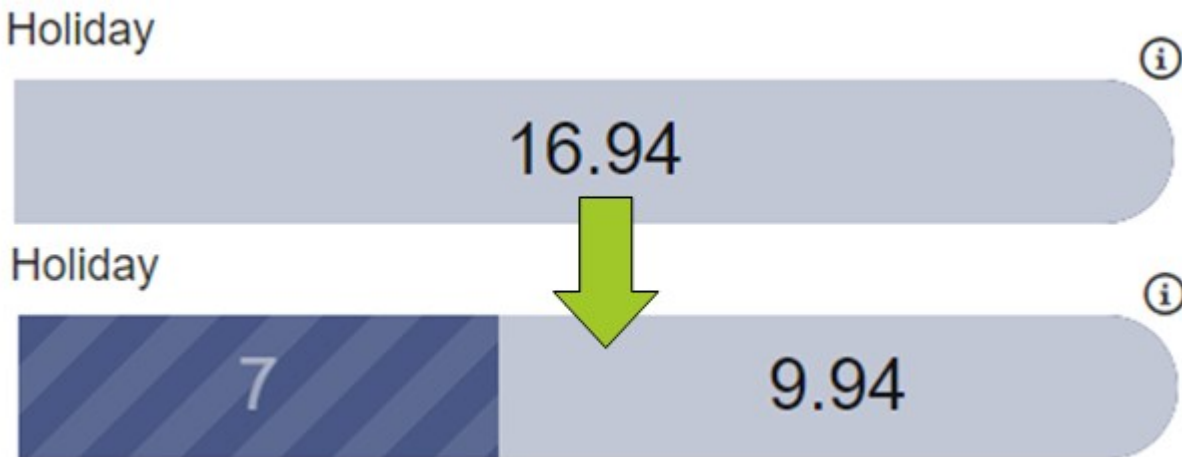## Holiday Screen

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**.

Holiday graphic (shows Approved, Requested and Remaining holiday)

Select to view key for holiday graphic

Select to **Request** holiday

Select to ask a **Question** about holiday

Select to view **This Years** holiday details

Select to view **Next Years** holiday details

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:

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:

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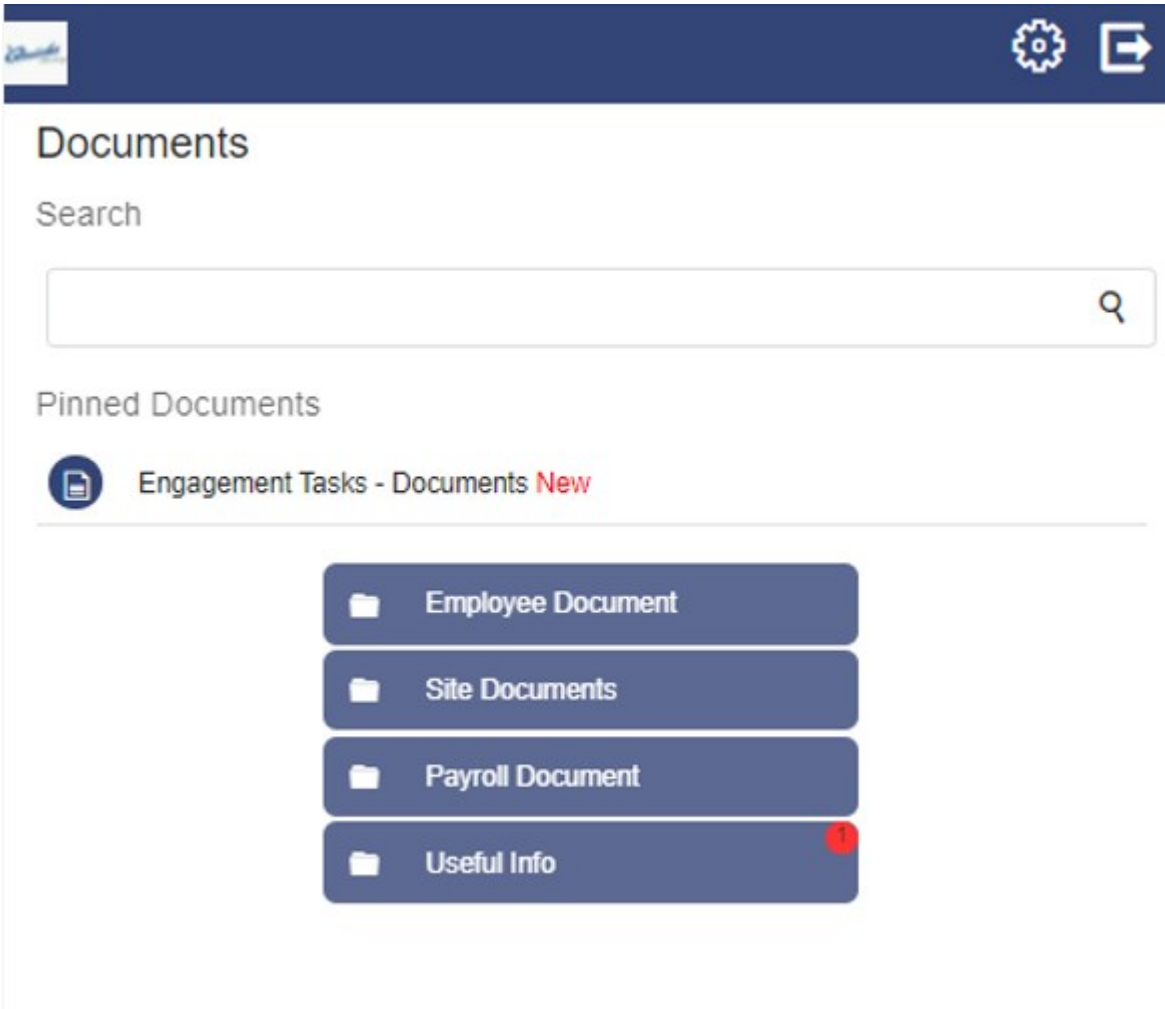
You can view your documents by selecting **Documents** on the Employee Portal home screen:
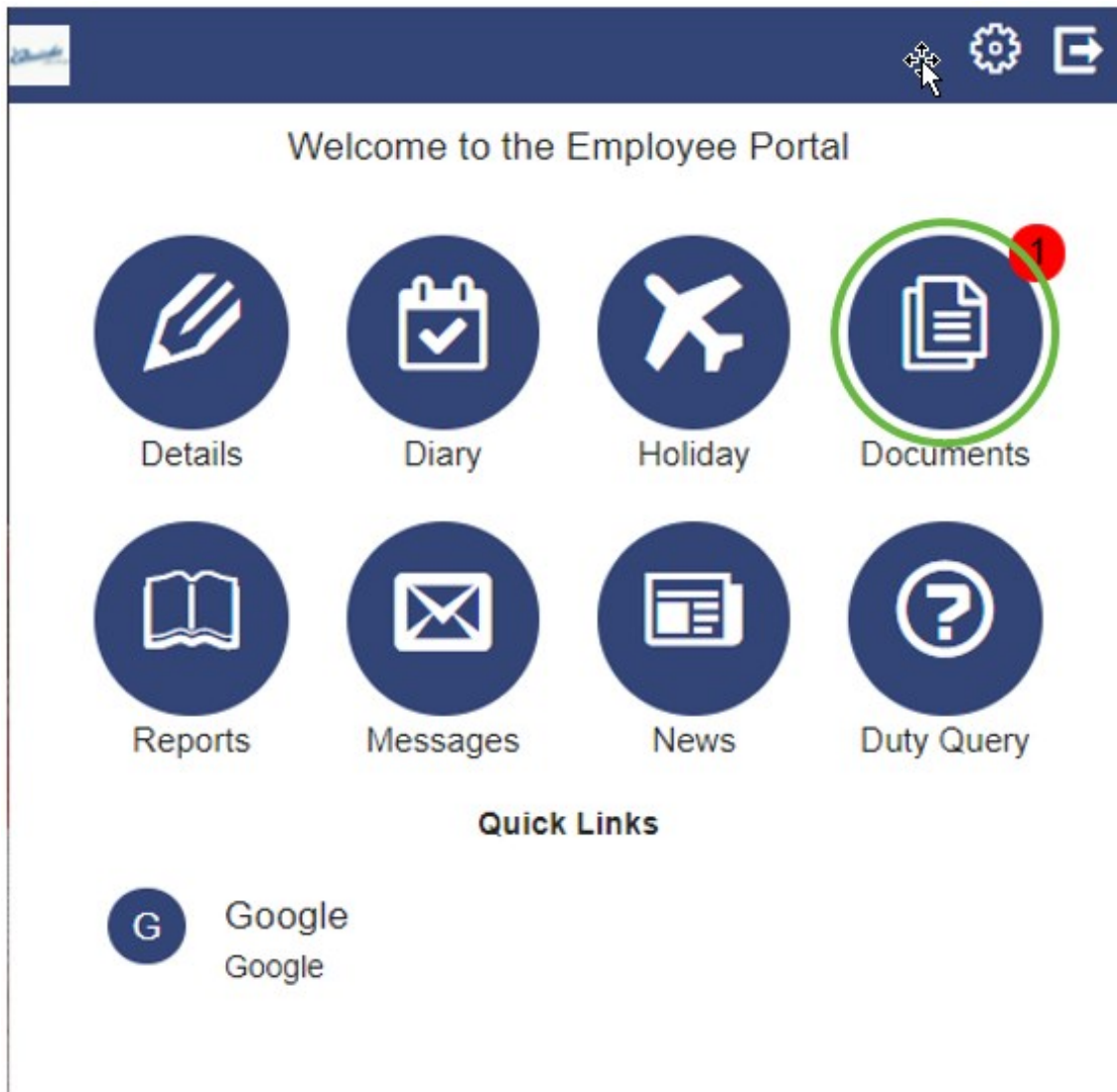

New documents are highlighted on the **Document** icon

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:
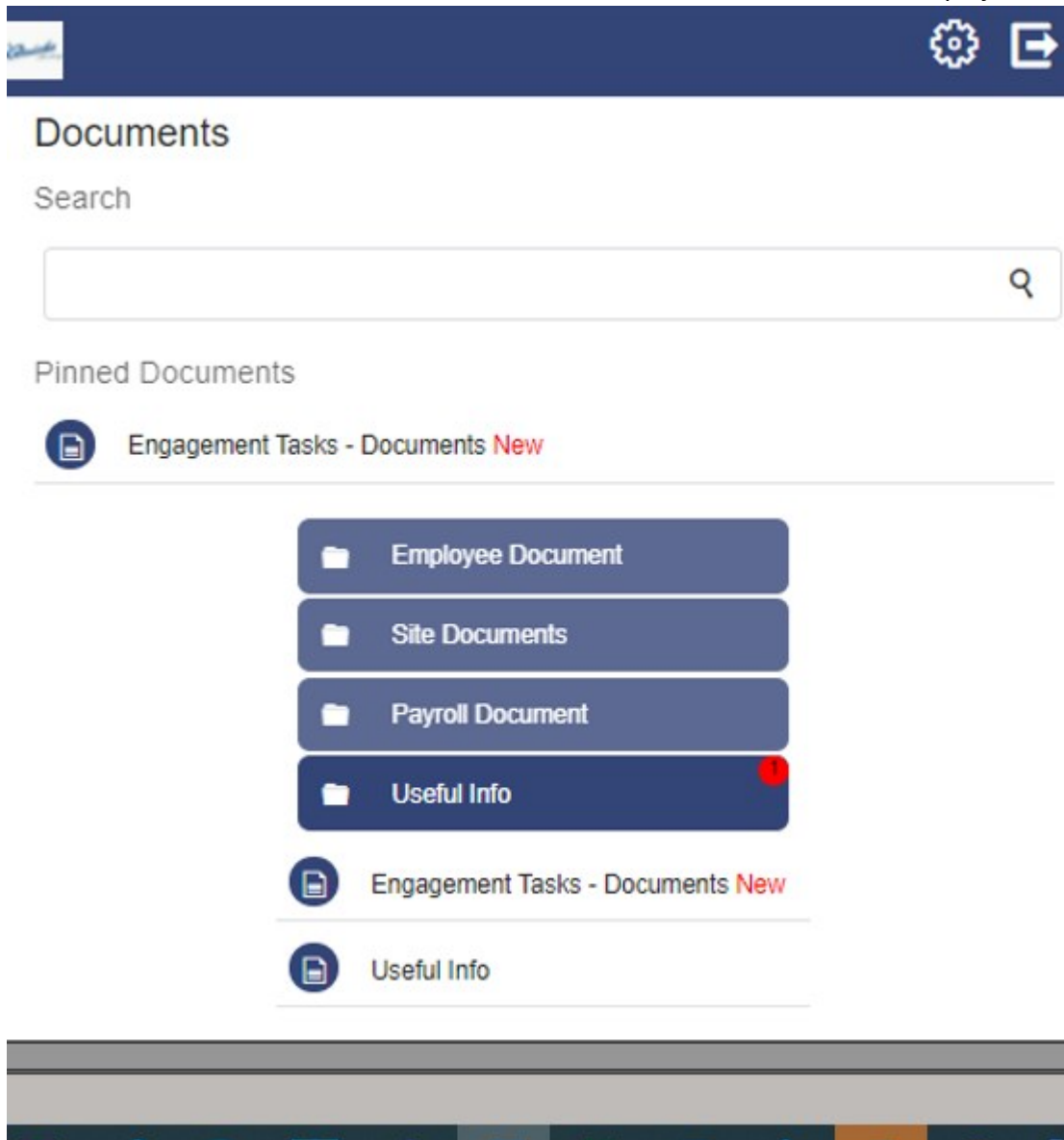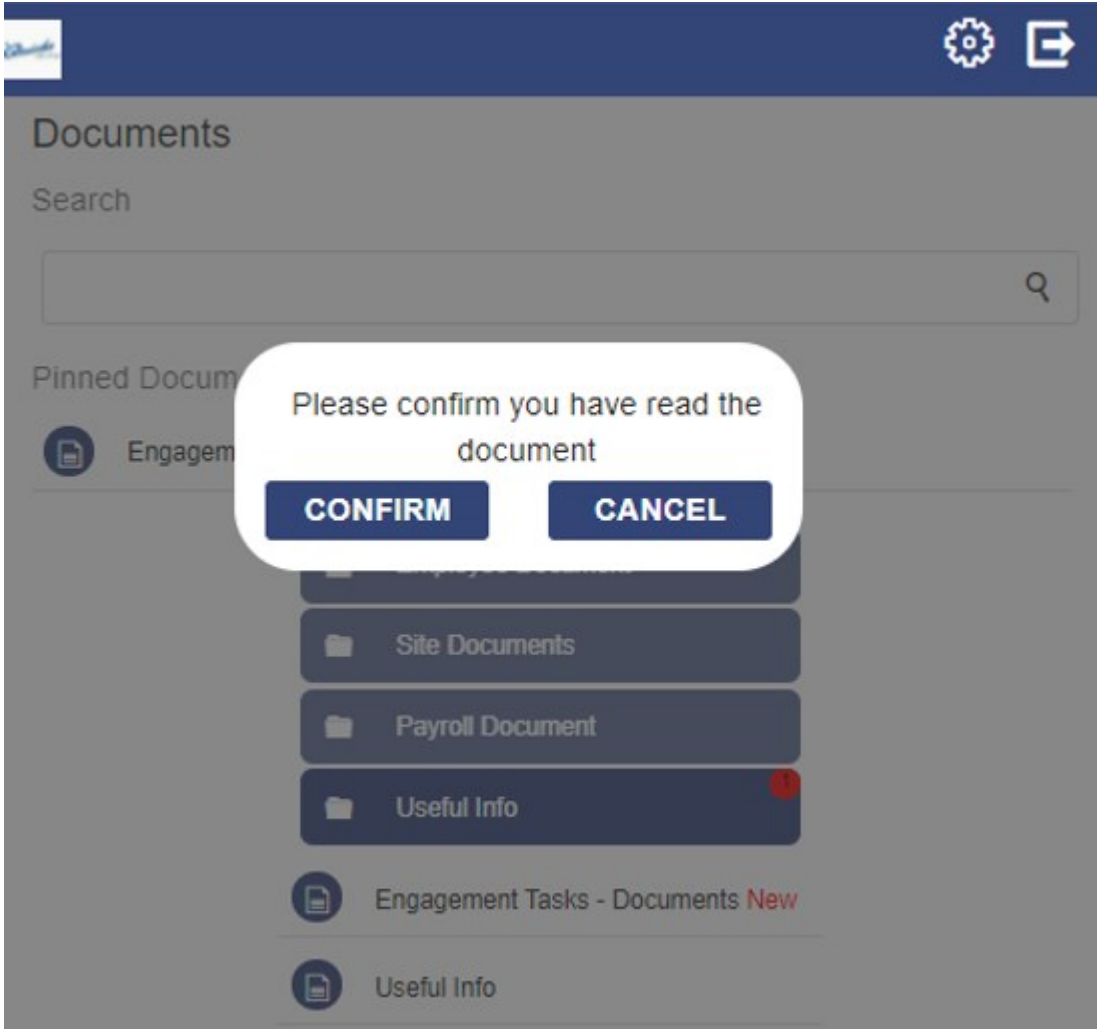

- Select the document to open or download it

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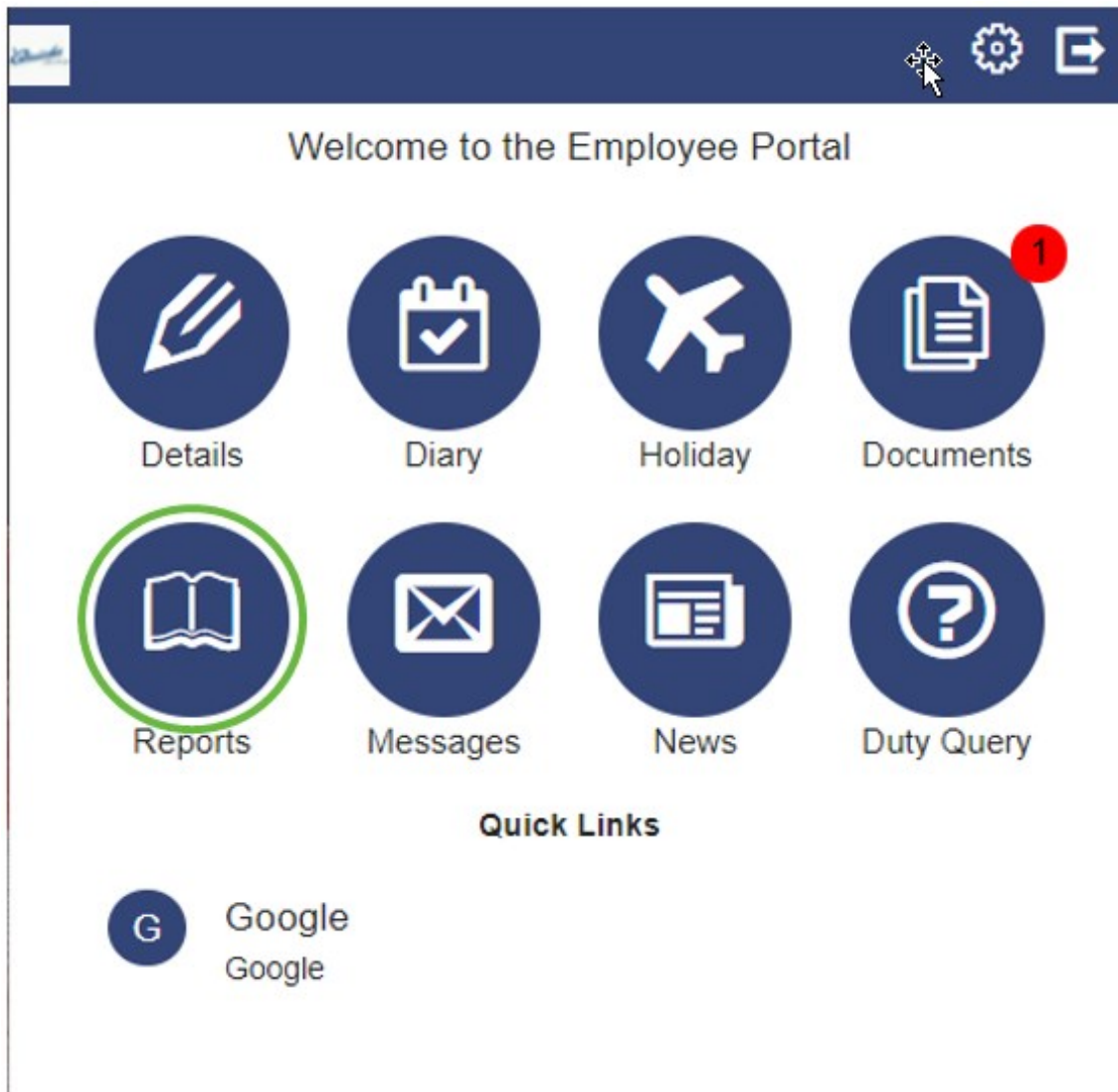
Confirmation of Reading

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:

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.

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.

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:
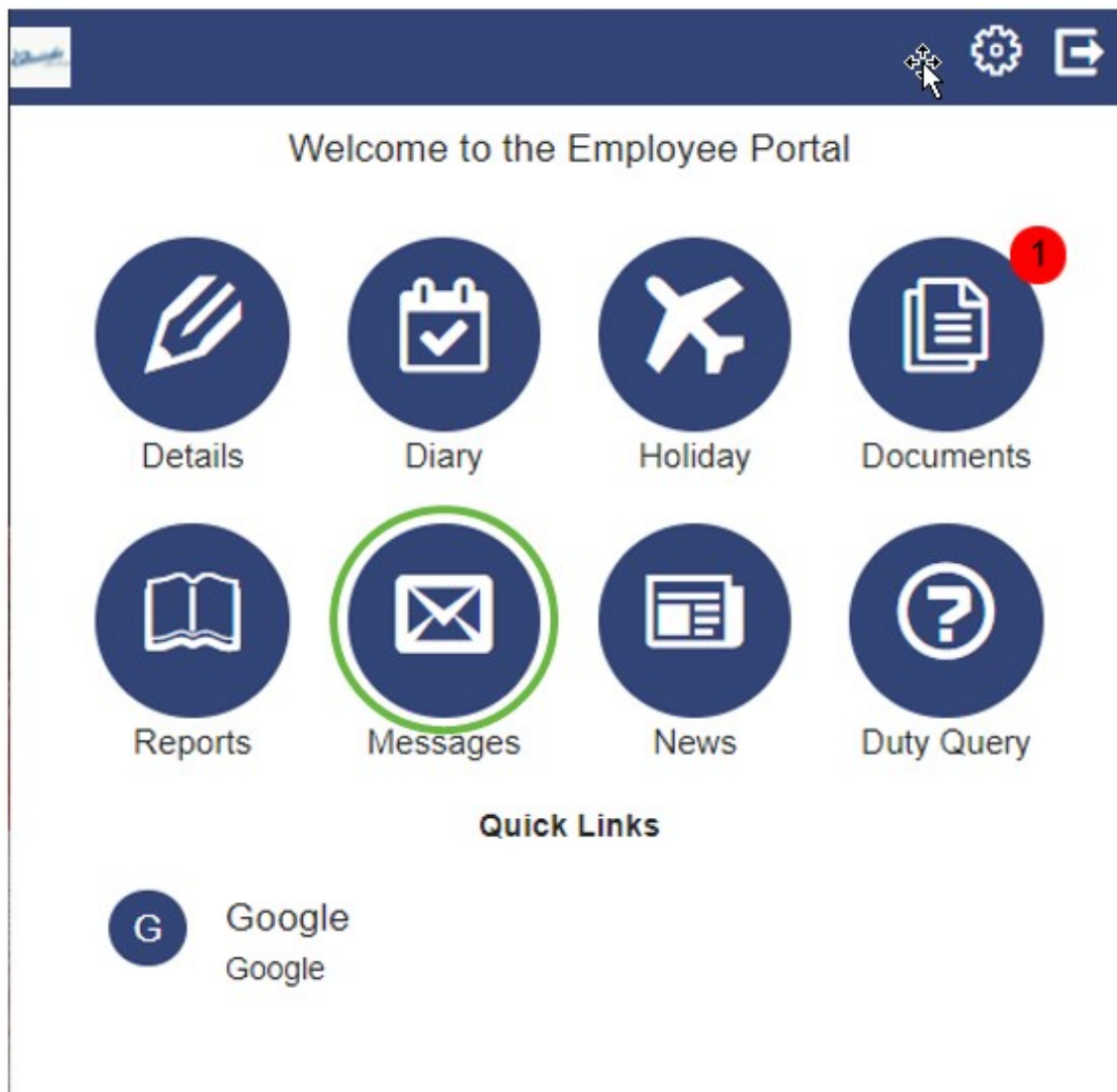
Viewing messages

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

Messages

✖	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

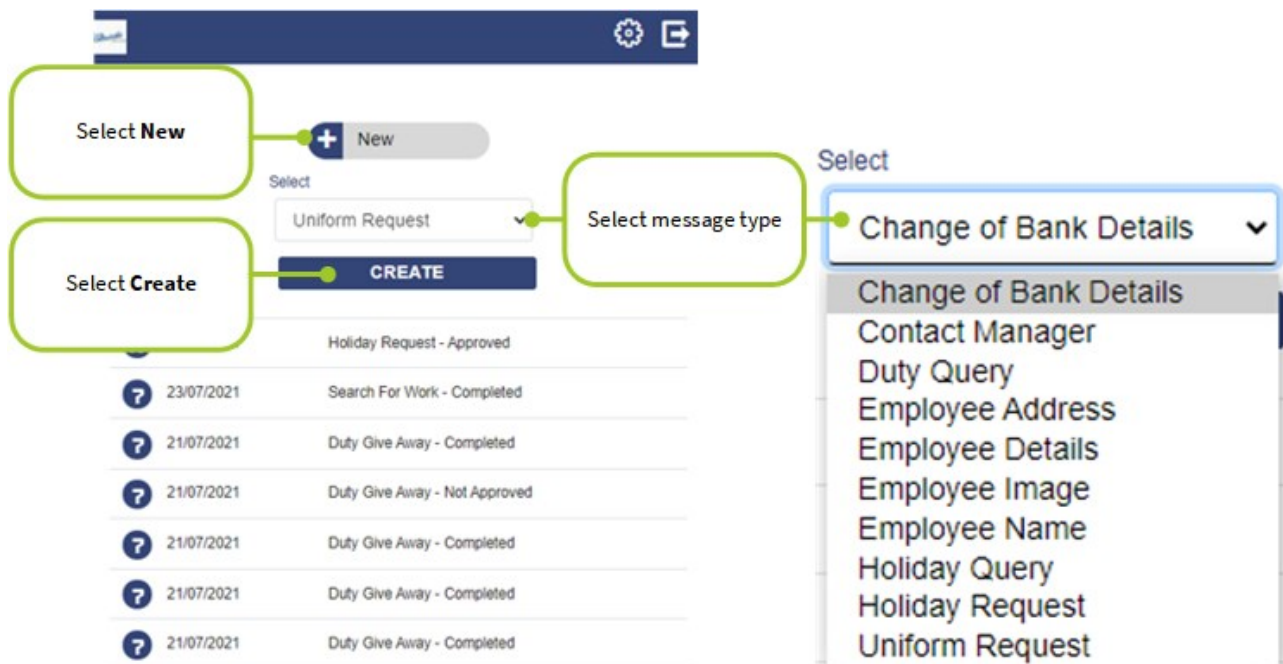Status
Approved

Delete a message

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

Send a message

- 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**:

- 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:
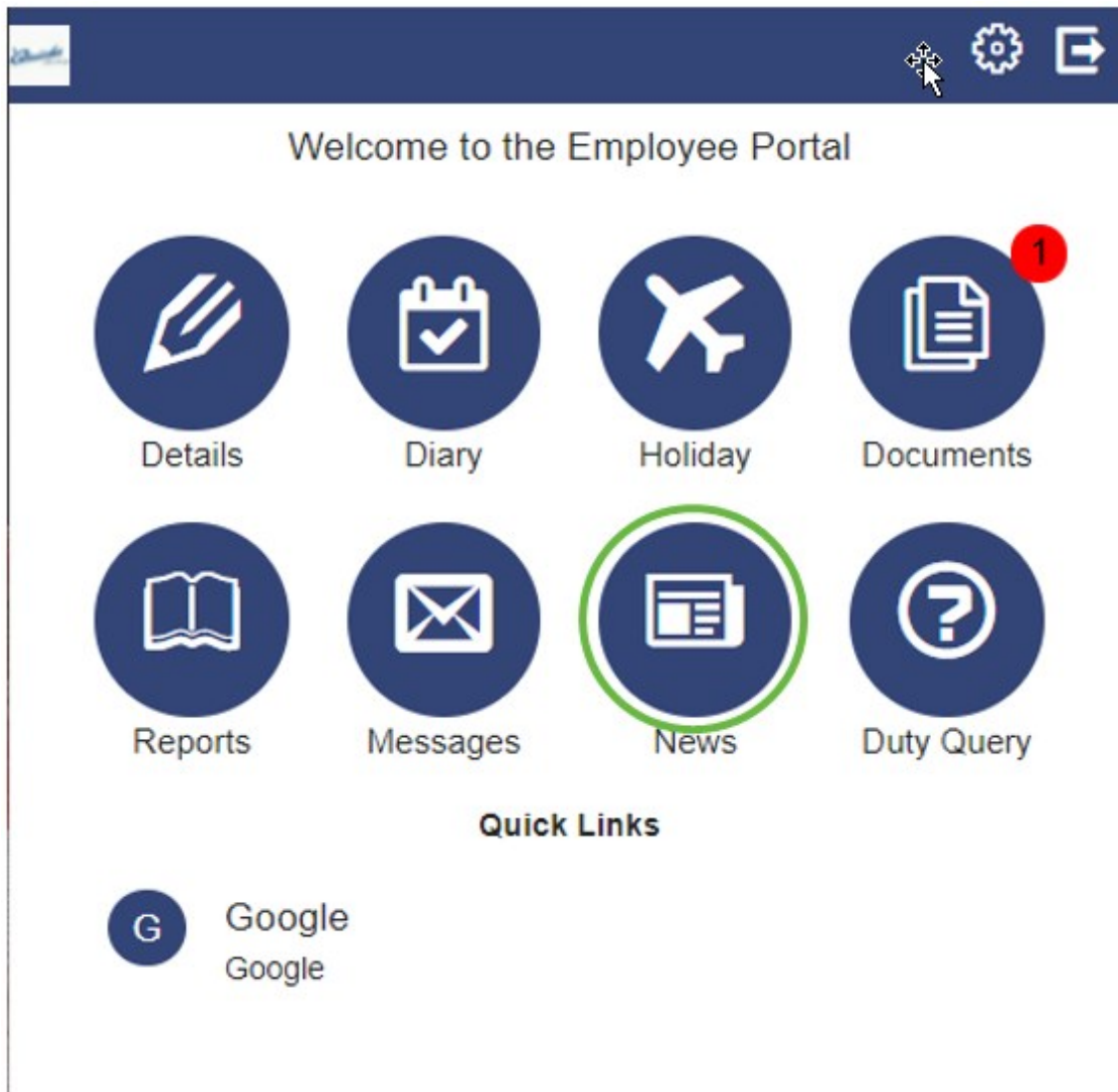
You may also see **News** items displayed on the Home Page as shown in this example:
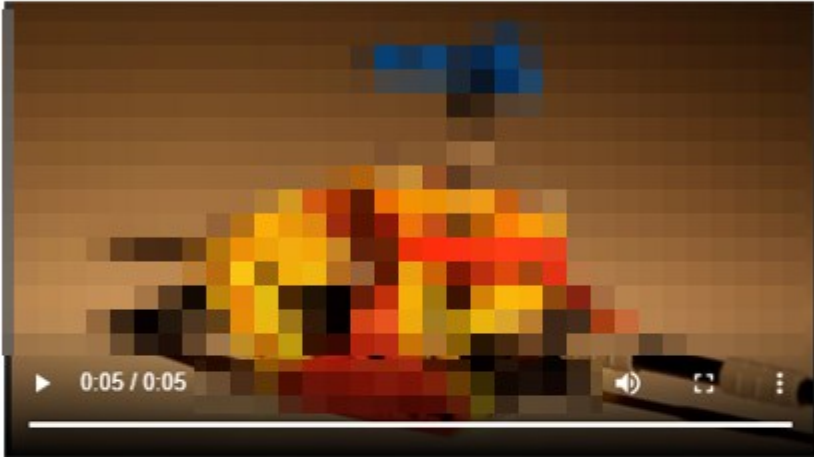
Either select the **News banner** or **News icon** to view **News and Announcements**.

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:

News and Announcements

📹	30/07/2021	*Latest News*
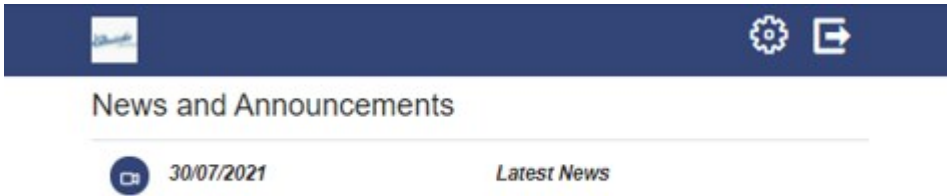
If the news item includes a video clip. select the play button to view the clip:

News /

Latest News

Select to Play| Pause

Make full screen

▶ 0:00 / 0:05

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:
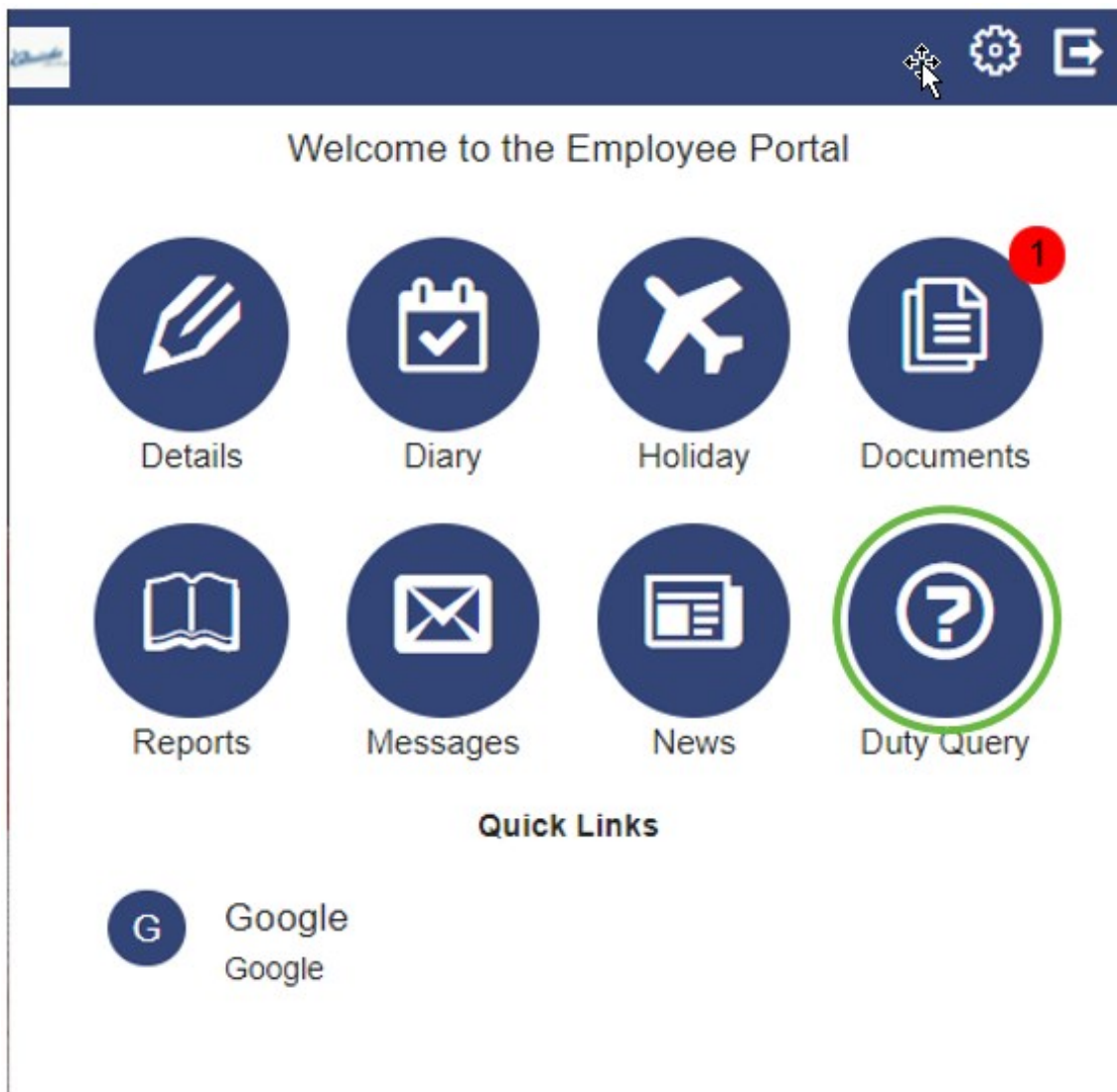
Making and submitting your Duty Query

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:

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

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

31/07/2021   00   00

SEARCH

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

Select **Search** (loads a confirmation 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
[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 of reject the swap offer. Select **Messages** on the **Employee Portal** home screen to view your messages:
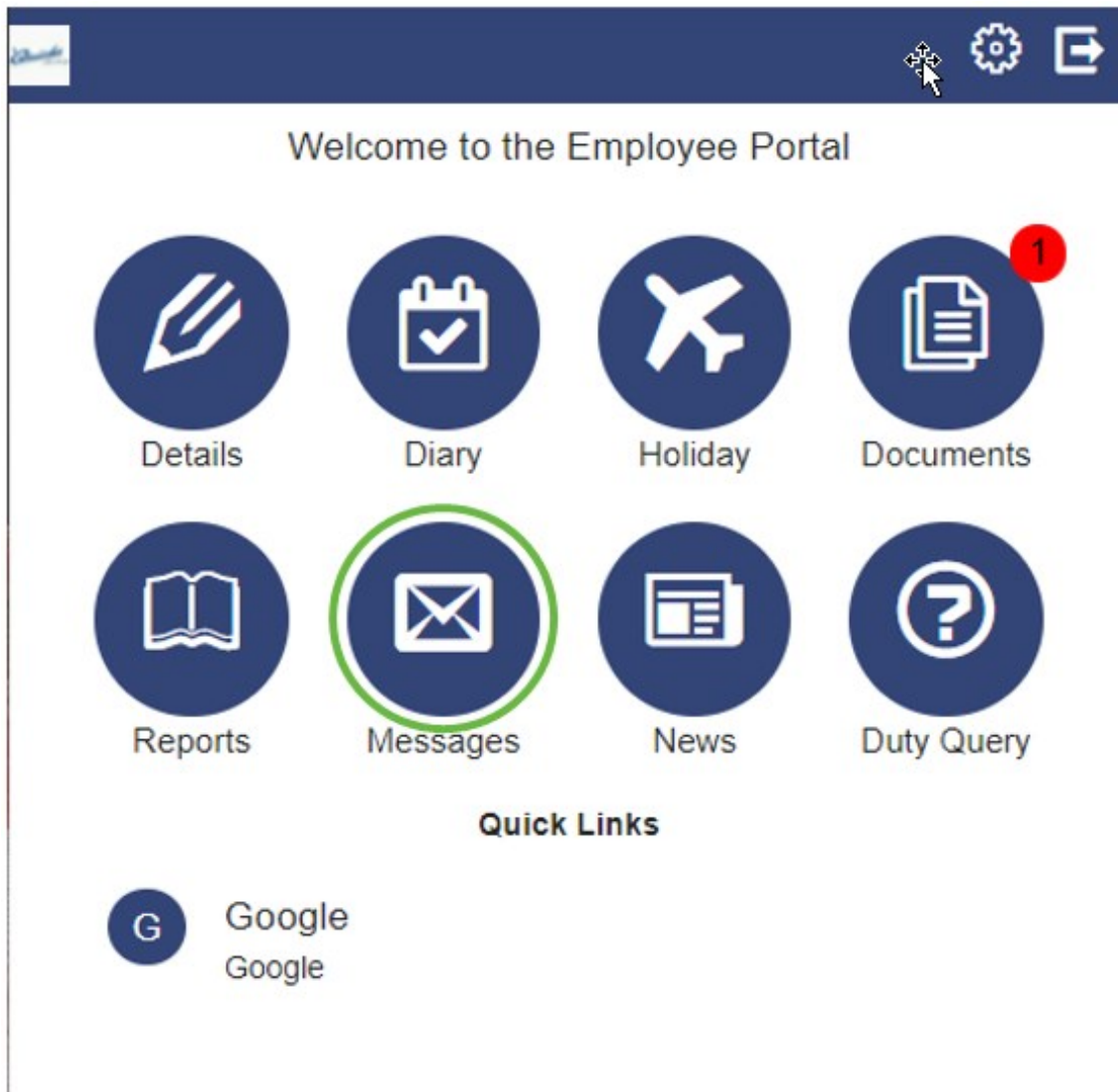
The **Messages** screen opens ready to locate the message and accept/reject it:

- 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?

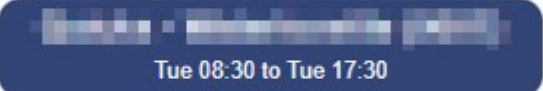To give away a duty, first you must locate it within your diary. Select **Diary** on the Employee Portal home screen:
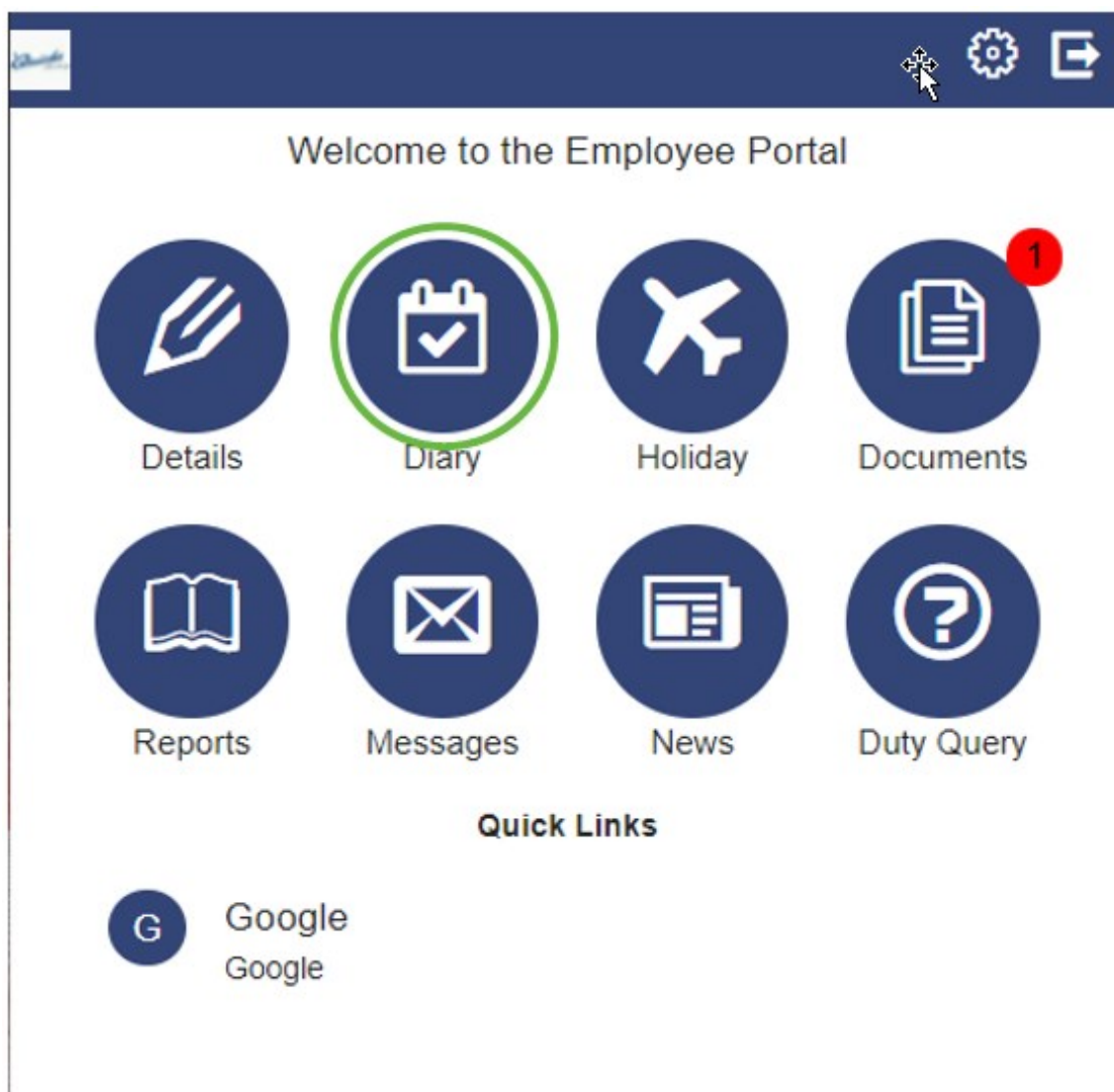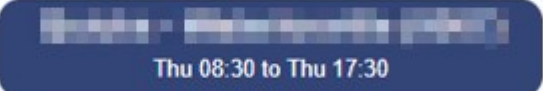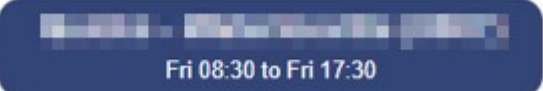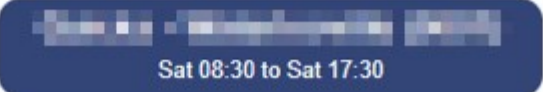

A screen similar to the following will open:

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:

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:

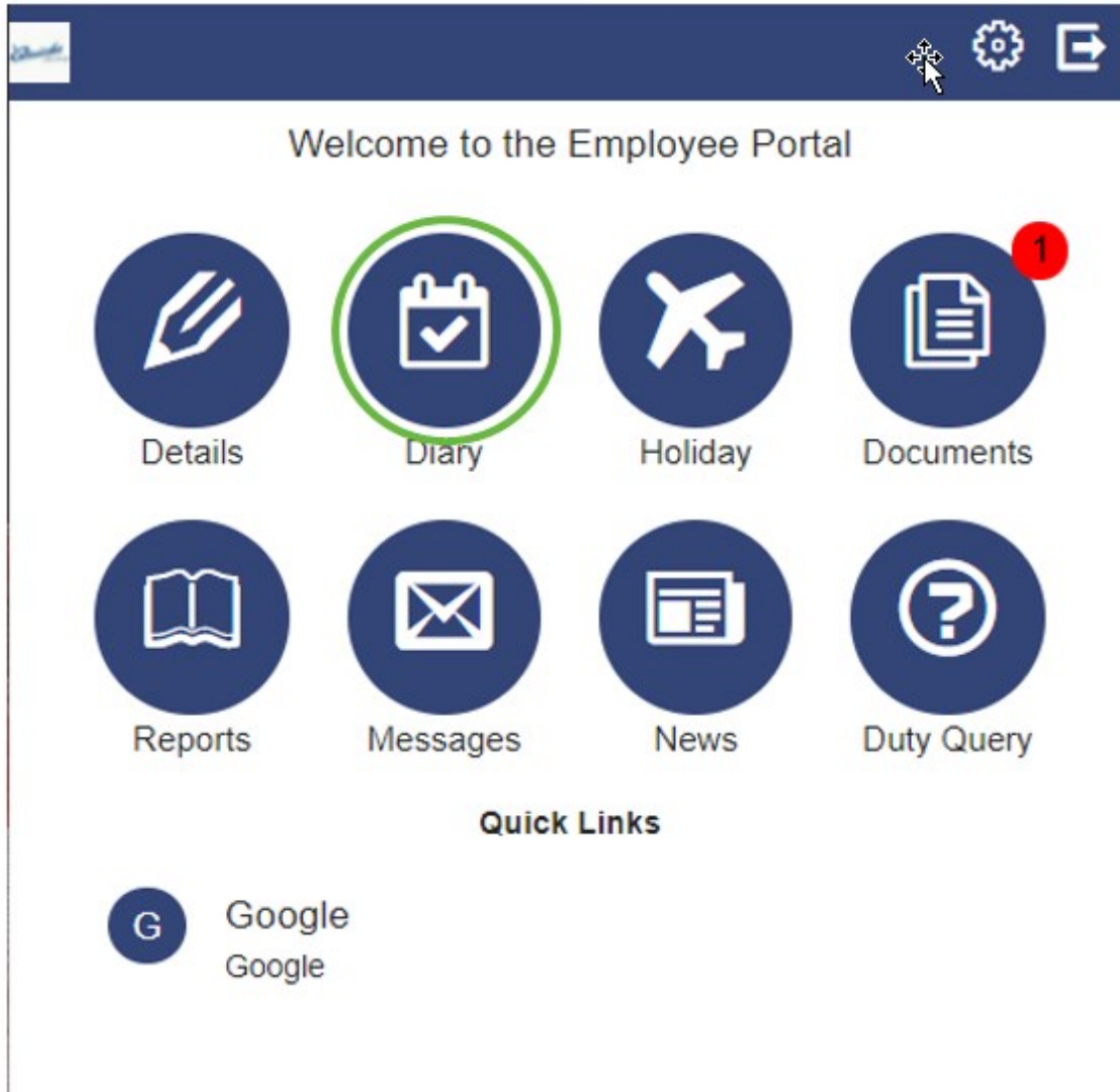The **Duty Give Away** request has now been send out to all employees. They will see it as available when they do a Work Search. Once a fellow employee agrees to undertake the duty, a task will go to the relevant person in your company (i.e. your manager / supervisor / scheduler) who will approve/reject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

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

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:

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

Diary / Work Search / Work Request

Duty	
Customer	
Site	
Address	
Slot	Slot 1
Shift Duration	09:00
Start	08/08/2021 08:00
Finish	08/08/2021 17:00
Distance	Unknown
Comments	

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.