

Timegate/TemplaCMS Interface (Version 2.1) Guide

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INTRODUCTION

Welcome to the Timegate/TemplaCMS Interface Guide! This guide will enable you to understand the Interface between the two products, as well as to learn the key areas of Timegate that you will come across whilst undertaking Time & Attendance (T&A) related activities.

What functionality does my Timegate/TemplaCMS Interface implementation have?

This is dependent upon the version of the Interface and how you have it configured. Today, most customers that have implemented the Timegate/TemplaCMS interface generally use **Version 2** or **Version 2.1**:

- **Version 1** - This is the simplest implementation of the Timegate/ TemplaCMS Interface transfers the information between TemplaCMS and Timegate, with Timegate handling Employees booking on/off the system (see "The Timegate/TemplaCMS from an "end-user" perspective" on page 9 or "The Timegate/TemplaCMS from a "technical" perspective" on page 10). Booking on/off takes place using the Employee App or clock-in.com. The actual book on/off times are used.
- **Version 2** - Building on **Version 1**, this version of the /TemplaCMS Interface offers enhanced features and functionality:
 - **Arbitration** - this choice is one of the key differentiators between Version 1 or Version 2. In Version 1 all times are recorded using the actual book on/off times, recorded using the Employee App or clock-in.com. Alternatively, in Version 2 arbitration can be enabled - allowing manual overrides of these values as needed to address exceptions. When configuring the system, you can decide whether to use the actual values to record times, otherwise, arbitrated Pay Start / Pay Finish times are used
 - **Flexible shift support**
 - Option to extend **caller ID** support
 - Option to **allow users to book on to a duty outside of shift times**
 - How to **handle Employee PINs** between the two systems
 - How to **handle SINS** between the two systems
- **Version 2.1** - This further builds on **Version 2** of the Timegate/Templa CMS Interface offering the following significant feature and functional enhancements:
 - **Holiday and Absence** - All added and amended holiday or absence **diary events** are now sent from Timegate to TemplaCMS. This enables Timegate's Employee Portal users to self-serve holiday bookings. Upon receipt of each event, TemplaCMS maps the diary event details to determine if they are holiday or absence (and associated absence reason). The resulting event is then added to the TemplaCMS employee plan, where it will be expanded to cover the relevant sites and dates on which the employee is contracted to work.. Absence reasons and staff plan entry types mappings between Timegate and TemplaCMS are created and maintained in the TemplaCMS **External System Details | Mappings** tab. All holiday entitlements and balances will continue to be managed within TemplaCMS only. These are not synchronised back to Timegate
 - **Multi-Task handling** Where an employee is assigned to a single contract multiple times – on different tasks or different work types – the shifts sent to Timegate and the resulting logs returned

can become mismatched, as there has been no way to differentiate multiple entries for the same employee/site/date. This process has now been improved so that when TempaCMS sends out shifts it will now translate the **Task type** and **Employee work type** into Timegate's **Hour type** and **Pay level** codes respectively. Within Timegate these are associated with a **duty** and returned with the call logs recorded against that duty. Consequently, TempaCMS can now correctly assign the logs to the shifts on the **timesheet**. Furthermore, where unplanned or additional cover logs are returned from Timegate, as the log now contains both the **hour type** and **pay level**, TempaCMS can use these to identify the correct task on the site, and work type. This functionality relies on mappings being defined within the external system for employee types and task types

- **Geofencing enhancements**

- In TempaCMS the Google Places API is used to configure Longitude and Latitude. Within TempaCMS these details can then be manually tweaked as needed, and a geofence radius set. Where a geofence has not been set within TempaCMS, Timegate will apply one based on the site postcode.
- Additionally, within TempaCMS a **No Geofence?** option has been introduced in the **Geofence** window. This setting tells Timegate not to check the position of the device being used to make a T&A call against the Geofence (by setting an unlimited distance from the coordinates). This then enables the employee to make their on/off call from anywhere regardless of their proximity to the site longitude/latitude.

- **Shift buffers and flexibility** - The TempaCMS **External System** (with overrides at **Site level**) allows a call window to be defined using duty start and end buffers (in minutes). Within Timegate this controls how early or late the employee can log in and out of a duty, as well as being the trigger point for an escalation if an employee does not log in within the buffer period. In Version 2.1 of the Timegate/TempaCMS interface, this feature has been extended with the following options:

- **External Systems**

- **Secondary Buffer - minutes after primary** - this buffer setting configured in TempaCMS that defines the number of minutes after the expiry of the primary buffer that the secondary escalation alerts will be sent out from Timegate if the employee has not booked on/off their duty
- **Allow booking outside buffer window** - this setting in TempaCMS allows calls to be taken outside of the Call Window. This can be set in the **External System** settings as a default and at a **Site level** to override as needed. If no buffers are set then this flag will still be set in Timegate as T&A will not be possible without it.
- **Mark shift as flexible when timespan __ minutes longer than contracted hours** - Where an employee is contracted fewer hours than the timespan of the shift (e.g. 7 hours between 09:00 and 18:00), the Timegate/TempaCMS interface will mark this as a **flexible shift**. There are situations where this is correct, but also where the difference in time is relatively small e.g. it may simply be that unpaid breaks are expected but have not been defined. By specifying the number of minutes here, the shift exported to Timegate will only be marked as flexible if the difference exceeds the entered value.

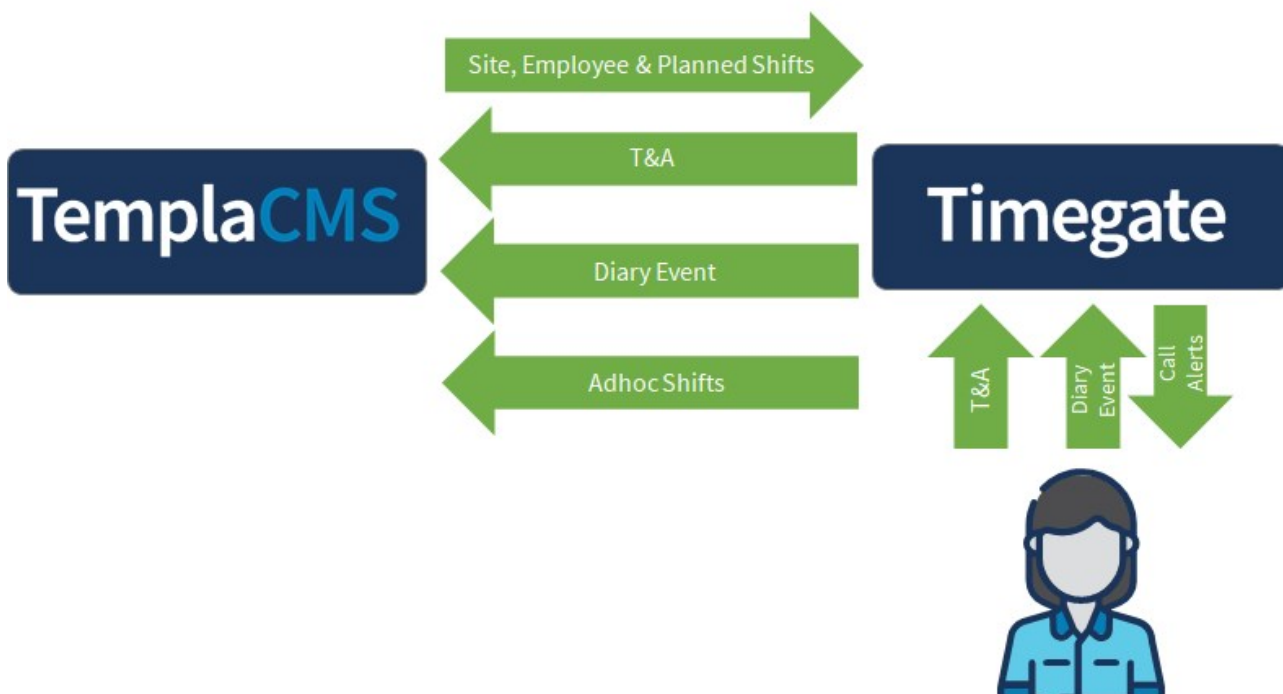
- **Sites**

- The **Shift buffer overrides to external system defaults** as defined on the site have been expanded to also allow the override of the secondary buffer (**Secondary buffer - minutes after primary __**) and allow booking outside window options (**Allow booking outside buffer window**)

- **Escalation Groups** - The Timegate/TemplaCMS interface now automatically adds and amends Escalation Groups in Timegate based on the employees associated with the five levels of the BA set as the **management structure** on the **Timegate external system definition** and the Site Card BA Settings. During the export of sites from TemplaCMS to Timegate, the process will interpret the management structure of all Timegate enabled sites into a distinct set of **escalation groups**, where each is a unique set of employees associated with the TemplaCMS business analysis codes of the sites. Changes to these escalation groups and their assignments to sites are then communicated to Timegate. Please note that in Timegate these are configured as **adhoc escalation groups** (as the escalation point i.e. Site Manager may not be a Timegate user)
- **Site Roles** - these are now created in Timegate using the TemplaCMS **BA Codes** defined on the **Timegate External Screen** and within the **Site Card BA Settings**. **Site roles** in Timegate are now created using the BA structure defined in TemplaCMS. These site roles can then be assigned against a Timegate user to ensure that users logging into Timegate will only see the site and employees that they have access to in TemplaCMS

The Timegate/TemplaCMS from an "end-user" perspective

The diagram below outlines the integration process at a high-level - this is what the system will feel like to use as an end-user:

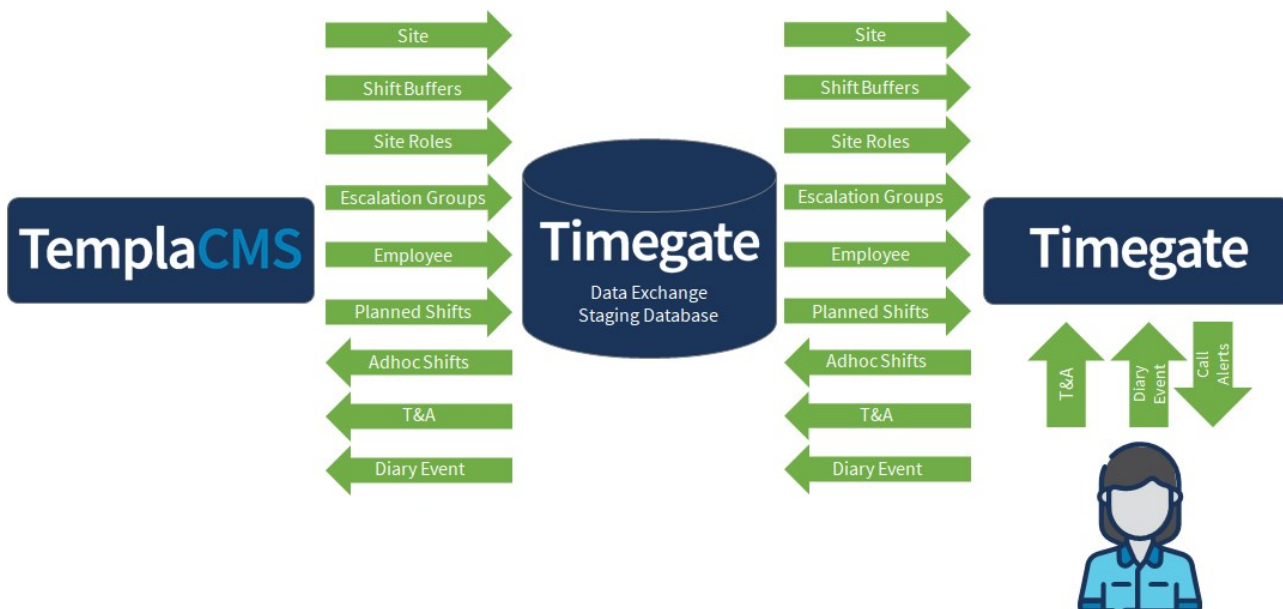


- **Site, Employee and Planned Shift (Duty)** information that is stored within TemplaCMS is shared with Timegate
- **Adhoc Shift (Duty)** information that is created as needed through Timegate is shared with TemplaCMS

- Timegate is automatically populated with the information provided from TemplaCMS. This information includes (for example) **Site Name, Site Code, Employee Name and Employee Code, Expected Shifts, and Base Rosters.**
- **Diary Events** (for **Absence and Holiday**) are transferred from Timegate to TemplaCMS
- Employees receive **Call Alerts** from Timegate
- Where/when information is changed or added in TemplaCMS, it is automatically updated in Timegate
- Once the information has been populated within Timegate, Employees' are able to book on/off their shifts. They do this through Timegate's Clock-in.com or the Employee App
- Exceptions (referred to as Arbitrations) and other corrections to T&A information is handled by Timegate Users, who should very quickly be able to make any necessary changes from Timegate
- This T&A information is then automatically shared with TemplaCMS - Timegate sends TemplaCMS hours-based information
- TemplaCMS is then used to make payment of employees based upon what they have worked rather than what they are expected to work

The Timegate/TemplaCMS from a "technical" perspective

The diagram below shows the integration process in a lower-level of detail - this is how the system works from a technical perspective:



- **Site** data is transferred from TemplaCMS to the Timegate Data Exchange Staging Database (a Timegate Data Warehouse). For the purpose of the TemplaCMS interface, it's worth noting that all **Sites** sit within a single TemplaCMS **Branch**
- **Employee** data is transferred from TemplaCMS to the Timegate Data Warehouse, where it is checked to ensure that the employee is still active. When an employee is found to be inactive, their **Termination Date** will be set to the current day and any future rostered duties will be removed
- **Planned Shift (Duty)** data is transferred from TemplaCMS to the Timegate Data Warehouse
- **Adhoc Shift (Duty)** information that is created as needed through Timegate and is transferred to the Data Warehouse ready for transfer into TemplaCMS
- The **Site, Employee and Planned Shift (Duty)** data is transferred from the Timegate Data Warehouse to Timegate. The necessary entities are created/updated within the Timegate database

- Where/when data is changed or added in TemplaCMS, it is sent to the Timegate Data Exchange Staging Database - this is then transferred from the Timegate Data Exchange Staging Database to Timegate as above
- Employees' are now able to book on/off their shifts. They do this through Timegate's Clock-in.com or the Employee App
- Exceptions (referred to as Arbitrations) and other corrections to T&A data are handled by Timegate Users, who should very quickly be able to make any necessary changes from Timegate
- This T&A data is sent from Timegate to the Timegate Data Warehouse
- The T&A data is finally sent from the Timegate Data Warehouse to TemplaCMS
- TemplaCMS is then used to make payment of employees based upon what they have worked rather than what they are expected to work
- **Shift Buffer** settings including Primary and Secondary buffers and associated settings for the sites are transferred from TemplaCMS to the Data Warehouse where they are mapped to Timegate
- **Site Roles** are derived from TemplaCMS BA codes that are sent to the Data Warehouse where they are mapped into Timegate to ensure consistent access to site data from both within Timegate and TemplaCMS
- **Escalation Groups** are derived from TemplaCMS BA management structures. These are sent from TemplaCMS to the Data Warehouse where they are transformed into adhoc escalation groups for use in Timegate
- **Diary Events** for holiday and absence are transferred from Timegate to the Data Warehouse. From there they are accessed by TemplaCMS and mapped onto the employee plan
- Employees receive **Call Alerts** from Timegate

Interface set up switches

When configuring the Timegate/TemplaCMS Interface, your consultant will set a series of switches on the system that are not available for you to edit. They put these settings in place to make sure that the system works to your exacting requirements. In this section, switches are listed along with their options. This will enable you to understand the choices available to you and let you discuss them with your consultant:

Creation of PIN

- 0 - Do not Create a PIN
- 1 – TemplaCMS will send a PIN. It will attempt to create a PIN from the Templ **EmployeePIN** value. In this mode, zeros will be used to pad to the Timegate system PIN length. If the PIN already exists for another employee, it will not be added. This setting will also allow the PIN to be changed by TemplaCMS
- 2 – Timegate will auto create a PIN. Timegate will automatically apply the next available PIN from the system to the employee. This cannot be changed by TemplaCMS, regardless of what is contained in the EmployeePIN column

SIN Numbers

- 0 – Do not Create SIN
- 1 – TemplaCMS will sent the SIN. TemplaCMS will then will attempt to create SIN from TemplaCMS SiteSIN value. Again, as with the PIN, any necessary zeros will be used to pad to Timegate system SIN length. If the SIN already exists for another site, it will not be added. This setting will also allow the SIN to be changed by TemplaCMS

- 2 – Timegate Version 2 onwards will auto create a SIN, Timegate will automatically apply the next available SIN from the system to the site. This cannot be changed by TemplaCMS, regardless of what is contained in the SiteSIN column.

T&A or Arbitrated Information Sent to Templa

- 0 - (default) – Timegate T&A (Duty Calls) are sent
- 1 – Timegate arbitrated duty times are sent. Pay Start is sent at a LogOn record and Pay Finish is sent as a LogOff record. The Duty will only be sent once so any subsequent changes to the arbitrated times will need to be done in TemplaCMS

What does Timegate do when it imports TemplaCMS T&A data via the Data Warehouse?

The Timegate/TemplaCMS Interface imports 3 tables into Timegate via the Data Warehouse to manage T&A data:

- TemplaCMS Employees
- TemplaCMS Sites
- TemplaCMS Shifts

TemplaCMS Employee records become Timegate Employee records

When employee information is imported into Timegate from TemplaCMS, via the Data Warehouse, it is stored in a standard employee record. The contents of this are dictated by an employee Template. The Template is set up for the specific Timegate/TemplaCMS implementation. Regardless of the version of the implementation (1,2 or 2.1), the following employee's record data is imported into Timegate:

- | | |
|---------------------|---------------------|
| • EmployeePIN | • EmailAddress |
| • CompanyCode | • MobilePhoneNumber |
| • BranchCode | • JoinedDate |
| • Forename1,2 and 3 | • DateOfBirth |
| • Surname | • Gender |
| • LeftDate | • IsActive |
| • ChangedStamp | • CreativeDateUTC |
| • IsProcessed | • ProcessedDate |

TemplaCMS Site records become Timegate Site Card records

As with an employees data when Site data is imported into Timegate from TemplaCMS, via the Data Warehouse, it is stored in a standard Site record. The contents of this are determined by a Site Template. The Template is set up for the specific Timegate/TemplaCMS implementation. Regardless of the implementation, the following Site record is imported into Timegate:

- | | |
|---------------|---------------------|
| • SiteSIN | • County |
| • CompanyCode | • PostCode |
| • BranchCode | • BuildingReference |

- ClientCode
- Manager1EmployeeCode
- Manager2EmployeeCode
- Manager3EmployeeCode
- Manager4EmployeeCode
- Manager5EmployeeCode
- IsActive
- IsProcessed
- SiteName
- Address
- Town
- SiteType
- Longitude
- Latitude
- GeofenceRadius
- BufferMinutes
- EndBufferMinutes
- MaximumLogDuration
- AutoLogoutMinutes
- CreatedDateUTC
- ProcessedDateUTC
- SecondaryEscalationBufferMinutes
- AllowBookOutsideWindow
- EscalationGroupCode
- SecondaryEscalationGroupCode

TemplaCMS Shift records become Timegate Duty records

When Shift data is imported into Timegate from TemplaCMS, via the Data Warehouse, it is stored in a Duty record that is aligned to a Site in Timegate. The contents of this are determined by a Site Template. The Template is set up for the specific Timegate/TemplaCMS implementation.

Regardless of the implementation, the following Site record is imported into Timegate:

- CompanyCode
- EmployeeCode
- SiteCode
- TaskID
- Date
- StartTime
- EndTime
- DurationMinutes
- IsFlexible
- IsActive
- IsProcessed
- CreatedDateUTC
- ProcessedDateUTC
- HoursType
- PayLevel

What does Timegate do when it exports TemplaCMS data via the Data Warehouse?

Timegate uses the Duty table to store time and attendance information as listed below. The information that is outputted from Timegate into this table varies based on the version of the interface that you have installed. Once the T&A records are stored in the Duty table, the table is used to populate a Duty table in the data warehouse. This is then imported back into TemplaCMS within the TemplaCMSTALog table. If you have TemplaCMS Interface Version 2 or 2.1 installed, you can choose to either record actual time and attendance

values sourced using the Employee App or clock-in.com (Duty Calls), or use arbitrated values to record values in the **StartTime** and **EndTime** fields (Duty Arbitrations):

- Company Code
- Employee Code
- Site Code
- TaskId
- Date
- StartTime
- EndTime
- DurationMinutes
- IsFlexible
- IsActive
- IsProcessed
- CreateDateUTC
- ProcessedDateUTC

How are Diary Events (Absence/Holiday) exported from Timegate into TemplaCMS?

Timegate diary events are integrated into TemplaCMS timesheets using a one-way interface from Timegate to TemplaCMS. The interface passes details of new, amended and deleted **diary events** of the relevant system **diary event types** from Timegate (where they have been defined) to TemplaCMS. Within TemplaCMS these diary events will be used to create, amend and delete their equivalent **staff plan events**. Consequently, existing processes will integrate these events directly into the TemplaCMS timesheets, as well as preventing planned duties from being sent to Timegate where events exist. The information needed to do this is stored in the Templa Diary Events table:

- ID
- CompanyCode
- DiaryEventId
- EmployeeCode
- StartDate
- FinishDate
- Comments
- DiaryEventType
- SystemDiaryEventType
- IsActive
- IsProcessed
- IsInvalid
- CreatedDateUTC
- ProcessedDateUTC
- ExportRowVersion

How are Escalation Groups created in Timegate based on exported TemplaCMS data?

When sites are exported from TemplaCMS to Timegate, two tables are used to create adhoc escalation group in Timegate using TemplaCMS's BA structure codes. Changes to the management structure of TemplaCMS will be replicated in Timegate ensuring changes to the adhoc escalation groups. The tables supporting this are as follows:

Templa Escalation Groups

- EscalationGroupCode
- Description
- IsActive
- IsProcessed
- CreatedDateUTC
- ProcessedDateUTC

Templa Escalation Group Members

- EscalationGroupCode
- EmployeeCode
- AlertViaSMS
- AlertViaEmail
- IsProcessed
- CreatedDateUTC
- ProcessedDateUTC

How are Site Roles created in Timegate based on exported TemplaCMS data?

When sites are exported from TemplaCMS to Timegate, two tables are used to process BA code into Timegate Site Roles. Changes to the management structure of TemplaCMS will be replicated in terms of the sites visible to a user in Timegate will change too. The tables are as follows:

Templa Site Role Sites

- SiteRoleCode
- SiteCode
- IsProcessed
- CreatedDateUTC
- ProcessedDateUTC

Templa Site Role Employees

- SiteRoleCode
- EmployeeCode
- IsProcessed
- CreatedDateUTC
- ProcessedDateUTC

TIMEGATE GETTING STARTED (P1)

In this section of the guide, you will be taken through the basics of:

- How to login to Timegate
- How you configure the way Timegate looks
- How you navigate around the Timegate System

How do I login to Timegate and access my Timegate?

For Timegate hosted on the FM Cloud:

- An automated e-mail will be sent to you with a link to **Timegate Web Client** and a **Password**
- Select the link in the e-mail to open the **Timegate Web Client**
- When prompted on the log in screen enter your **E-mail address** and Password
- Select **Login**
- Finally, you will be asked to enter a new **Password**. Enter it, confirm it and then select **Save**

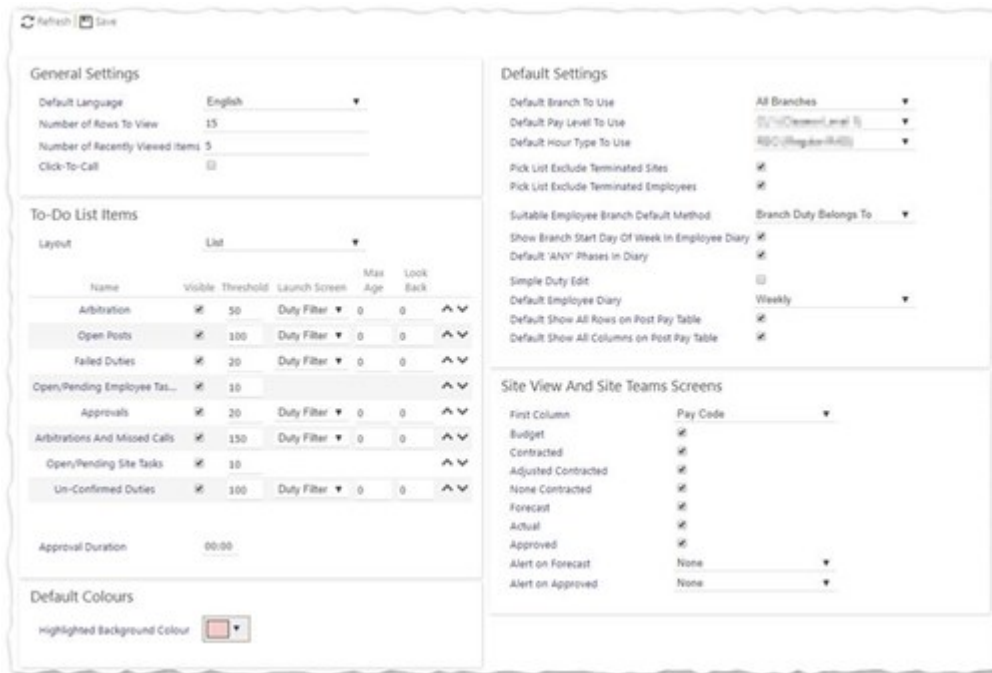
How do I configure the way my Timegate system looks and works?

Timegate can easily be configured to best suit your needs.


Select the **Settings Cogs (User Settings)** from the top right-hand side of the screen:



You are now free to alter the settings as needed. This can include items such as language, how much information is displayed on screen, **Click-to-Call** (enables you to click on a telephone number to launch your dialer software to make a telephone call to the number), **To-Do list items** (short cuts), colours, defaults and the content of the **Site Teams** and **Site View**.



Don't forget to select **Save** once you've made your changes.

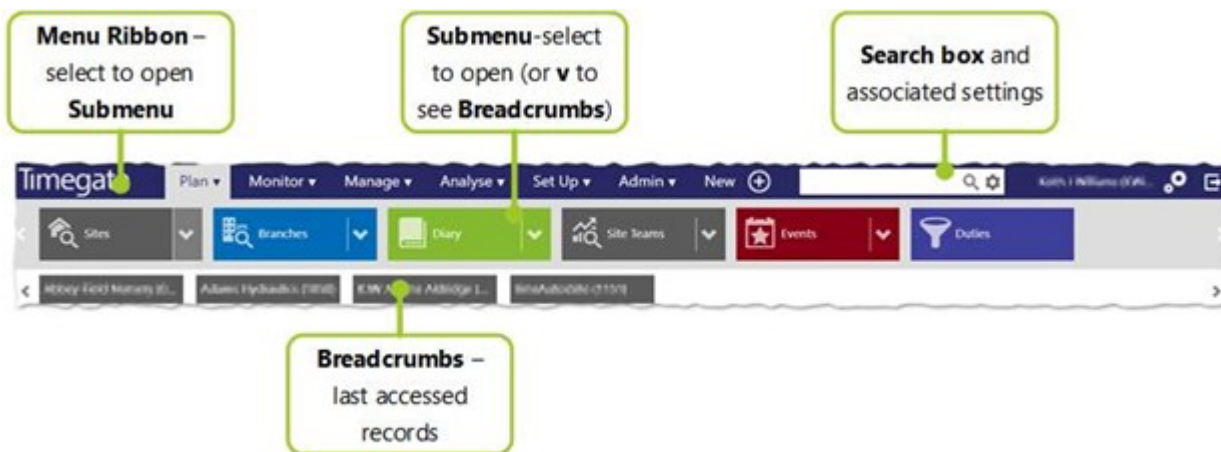


TIP: Most users configure their To-Do List items to be visible (by default they are not)

How do I Navigate around Timegate?

The Timegate system is generally controlled through a **main menu** and a pick-list **side menu/search bar**:

Main menu



The **main menu** at the top of the page comprises:

- **Menu Ribbon** - select the functional task you are interested in (for example SET UP)
- **Sub Menu** - this is displayed upon selecting a menu button. There are two buttons within each choice - the main option (for example **Employees**) which opens the default page and a **V**. Select **V** to view the Breadcrumbs
- **Breadcrumbs** - these items are the last five records that have been loaded. They give you fast access to

your work

- **Search Box** - from here you can enter your search terms, or configure the settings using the Settings Cog

Side menu/Search bar



Many of Timegate's pages have a pick list **side menu/search bar**. This is made up of:

- **Show/Hide** - select this to show/hide the menu/pick list
- **Filter/Choice/Search** - this does one of two things, depending upon the screen. It either filters your search or it provides you with access to other setting screens
- **Search Box and GO/SEARCH** - Enter keywords into the search box and select **GO/SEARCH** to speed up your search
- **Pick List** - select **X** to open a page of settings/search result item
- **Pick List Navigation** - to speed up looking through your results, use **<PREV and NEXT>** to look through the results

Within individual pages, there are often context sensitive **Toolbars**. These change depending upon the screen - an example of one is shown above with the **Pick list**. Furthermore, they will change depending on which items are selected. This makes it easier for you to see what actions can be applied to your given selection.

SETTING UP THE TIMEGATE/TEMPLACMS INTERFACE

When getting the Timegate/TemplaCMS interface to work, it is essential that a **Branch** has been set up for TemplaCMS, the imported **Sites** are correctly configured, and **Employee** records are correctly configured. This involves checking and editing existing settings as necessary including the potential creation of **auto duty create profiles** and **arbitration profiles**, and ensuring **call settings** are correct.

The following tasks need to be undertaken within Timegate to achieve this:

Create a TemplaCMS specific Branch

- Create a TemplaCMS **Branch** (See "How do I create a new Branch?" on page 21 for more information)
- Ensure the **Site Card Template** is set to your **TemplaCMS** site card template
- Ensure the **Employee Template** is set to your **TemplaCMS** employee template



Please Note: As the interface evolves multi-branch support will be implemented, however, whilst using TemplaCMS predominantly for T&A activities only one branch is required

Ensure the Site Settings are correct for each Site

- Ensure that the **Caller Line IDs** found within the **Caller ID** tab are set to the correct numbers for that site (See "Where do I define Site telephone numbers (CLID Number)?" on page 22) Alternatively, depending on implementation in Version 2 onwards, if no CallerIDs are sent for a site the system can be configured to allow calls when the CLID cannot be identified
- Ensure that the **Call Settings** are set to the appropriate **Call Setting** buffers e.g. 30 mins for all **ON/OFF/CHK Pre and Post Times**. If there are no buffer times set up, calls will be allowed at any time (See "How do I configure Call Settings for a Site?" on page 22) Alternatively, depending on implementation in Version 2 onwards, if no Buffer Minutes are sent for a site the system can be configured to allow employees to book on outside of shift times
- Enable **Auto Duty Create** for each **Site** (under **Call Settings | Automation Settings**), ensuring that the correct **Auto Duty Creation Profile** is assigned (see "How do I set up Auto Duty Create on a Site?" on page 22) To do this, you will also have to create an **Auto Duty Create Profile** (see "How do I create an Auto Duty Profile?" on page 24). When you set up the **Auto Duty Create Profile**:
 - Set the **Default Duty Duration** to the maximum length of a shift e.g. **03:00** hours
 - Set the **Default Hours Type** to **Regular**
- Enable an **Arbitration Profile** for each **Site** (under **Call Settings | Automation Settings**), ensuring that the correct **Arbitration Profile** is assigned (see "How do I configure arbitration for a specific site?" on page 30) To do this, you will also have to create an **Arbitration Profile** (see "How do I set up an arbitration profile?" on page 26) Once selected, exceptions (based on the rules within the **Arbitration profile**) will automatically be arbitrated.

Ensure the Employee Details are correct

- Ensure that employees are able to book on to the system even if they do not already have any duties scheduled. To do this, **Auto Duty Create** has to be enabled on the standard employee **Template** as well as on the Site one. Check the employee record to ensure that **Auto Duty Create** has been enabled in the **Site's Ops** tab (See "How do I set up an employee so that they can automatically create duties when they book on?" on page 25)
- Ensure that the employees **PIN** aligns to the **Payroll number** from the TemplaCMS system

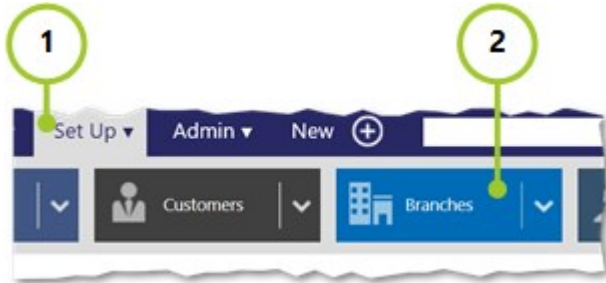
More details about each of these areas covered above can be found in "Setting Up - Supporting Information" on the next page.

SETTING UP - SUPPORTING INFORMATION

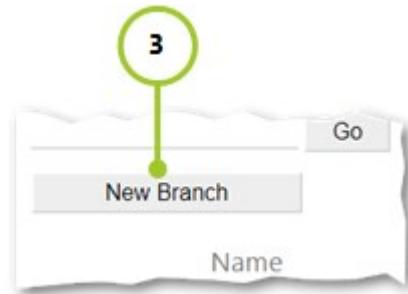
The following sections will help you when you are setting up the Timegate/TemplaCMS interface (as previously explained in "Setting Up the Timegate/TemplaCMS Interface" on page 19)

How do I create a new Branch?

Follow the steps below to create a new **Branch**:



1. Select **Set Up** from **Menu Ribbon**
2. Select **Branches** from the sub menu (Select **V** to view/edit the last five branches)



3. Select **New Branch** from the side menu



4. Complete all mandatory sections of the screen as a minimum (those shown with an asterisk beside them):
 - **Branch code** for example FMTR001
 - **Branch name** for example FM Training Branch
 - An error message will be displayed if you do not complete all of the needed sections
 - Complete any additional information that you may want to store in the fields (e.g. **SiteCard Template** and **Employee Template** within the **General Details** area)



5. Select **Save**

Where do I define Site telephone numbers (CLID Number)?

You can define a **Site telephone number** at **Set Up | Site | Caller ID**:



- Select **+ Add Number**
- Enter your first **Telephone Number** in the space provided for the first chase number
- Select **1st Chase**
- To add a further (optional) second number, **Select + Add Number**
- Enter your second **Telephone Number** in the space provided for the second chase number
- Select **2nd Chase**
- Select **Save**

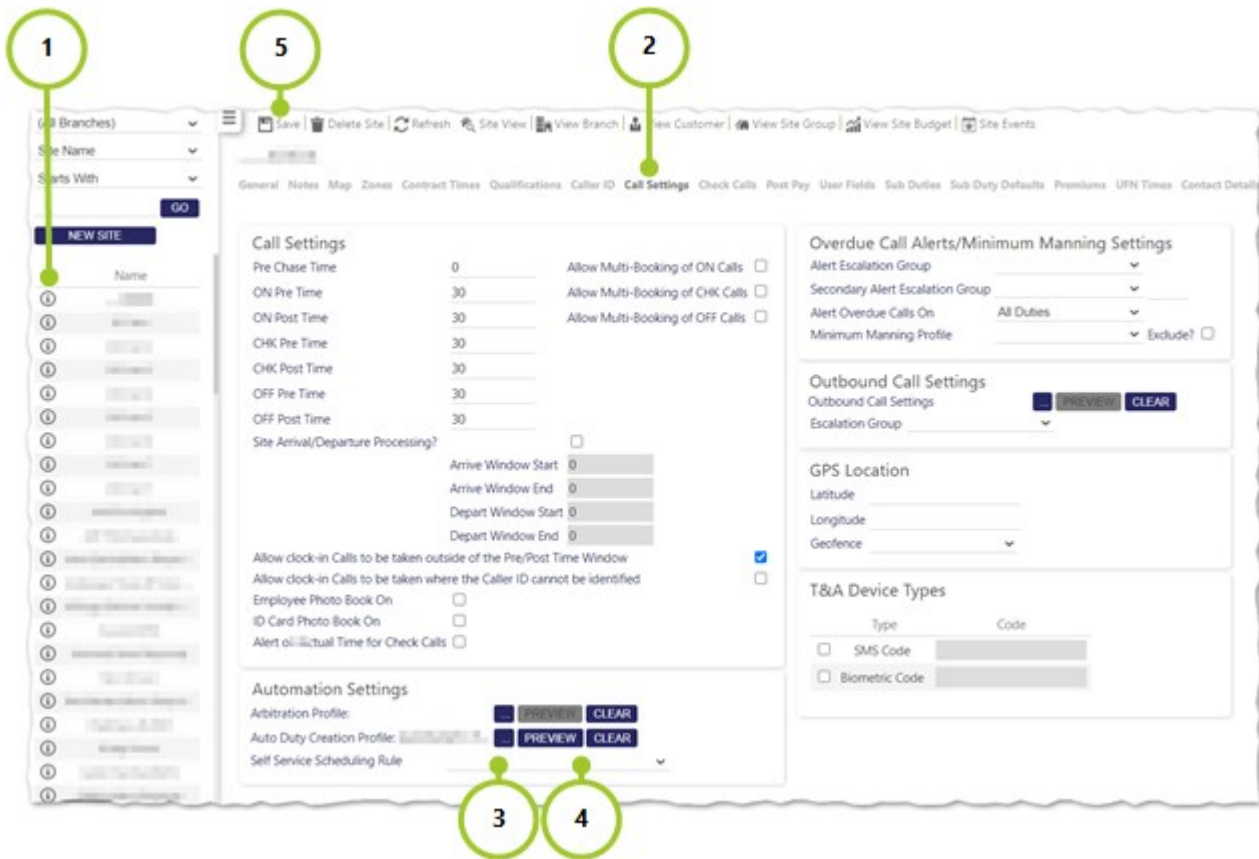
How do I configure Call Settings for a Site?

From within the **Set Up | Sites** page, under the **Call Settings** tab you can set up a variety of settings for each individual site about:

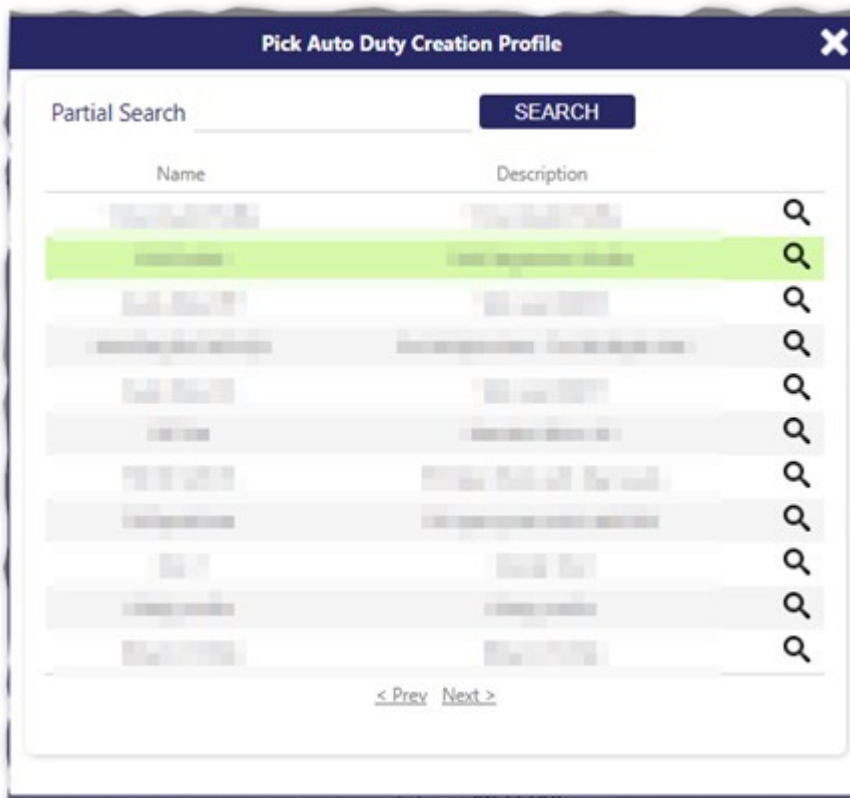
- How calls are handled (at the simplest level in terms of when check calls and clocking on/off calls can be accepted in relationship to their scheduled times - in minutes)
- Whether an employee needs to show a photo and/or ID card when booking on
- How Items are arbitrated (what profile is used)
- How Duties are automatically created (which profile is used)
- Escalation Groups for Call alerts (who responds to what and when they will be notified)
- Outbound Call Settings
- GPRS location (where the site is located along with its Geofence)
- T&A Device types (their pass codes)

How do I set up Auto Duty Create on a Site?


From within the **Set Up | Sites** page, navigate to the **Call Settings** tab as shown:



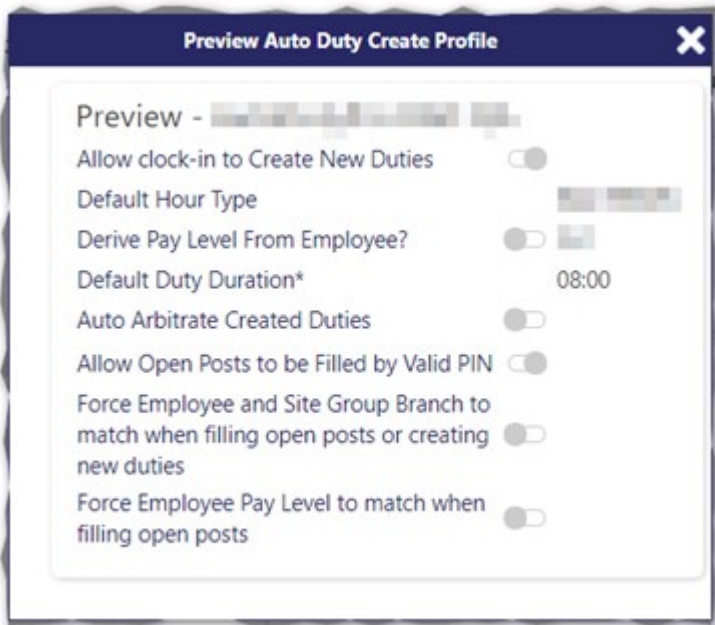
1. Select the **i** next to the site that you wish to configure the Auto Duty Creation Profile for
2. Select **Call Settings**
3. Select [...]. The following screen will be loaded:



Select an **Auto Duty Creation Profile** from the list (you may wish to search for this, or scroll through the list).

Select to choose the **Auto Duty Profile** that you wish to apply. To view a preview of the **Auto Duty Creation Profile** settings, select . Once selected the dialog will reload

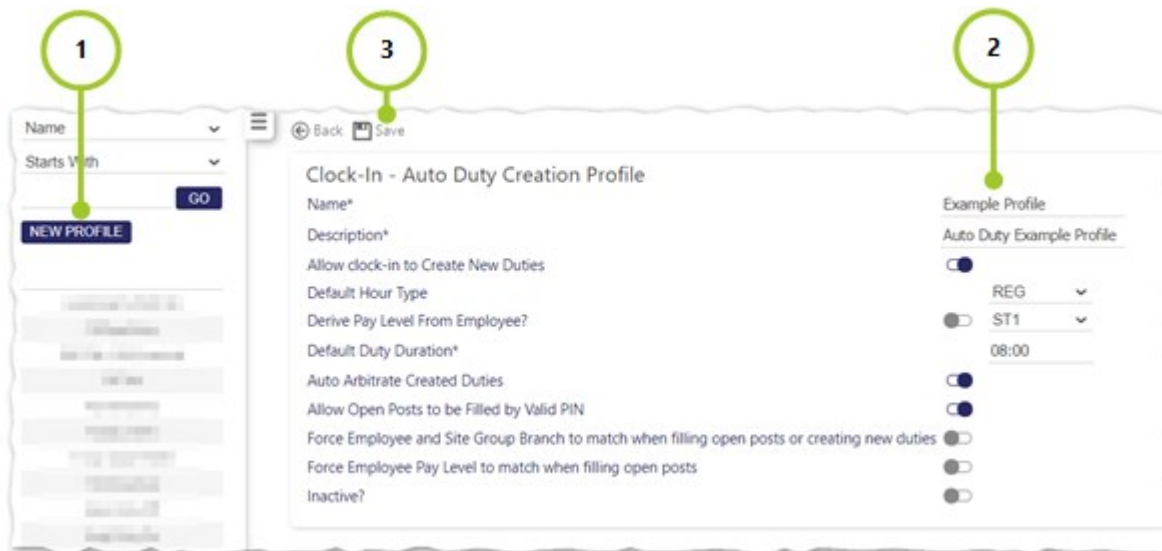
4. Select **PREVIEW** if you wish to see the **Auto Duty Creation Profile** details for the selected profile. An example is shown below:



5. Select **Save**

How do I create an Auto Duty Profile?

Timegate can be set up so that Sites automatically allow Clock-in.com to create duties that have not been scheduled. This is done using **Auto Duty Create**. From within the **Admin | General** page, select **Auto Duty Profile** (under the **Employee Settings** heading) and the following page will open:



Follow these steps to create a new profile:

1. Select **New Profile**
2. Complete the various **Auto Duty Creation Profile** settings:

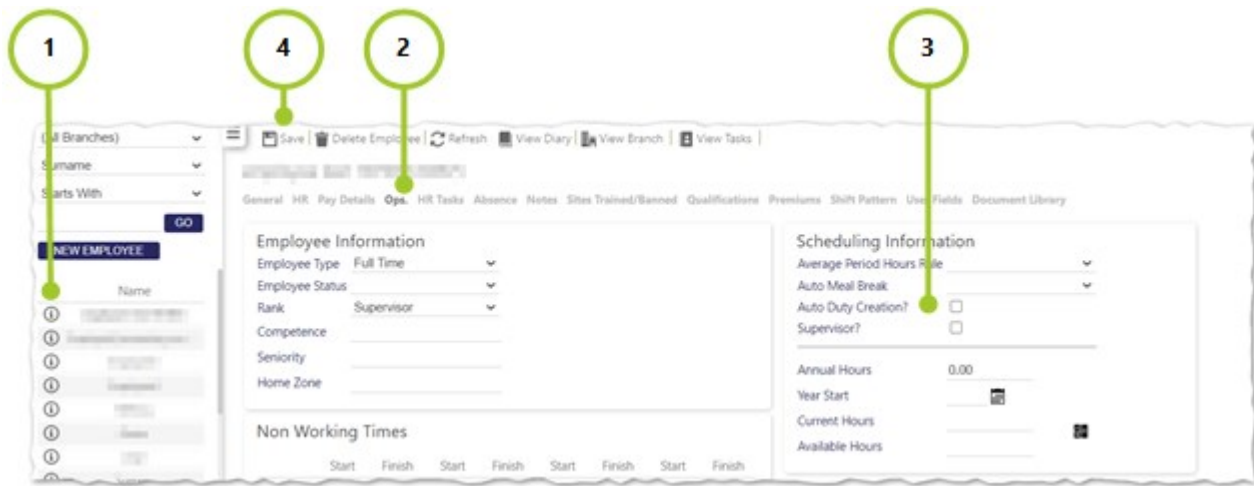
- **Name** - Mandatory field - A unique name for the profile
- **Description** - Mandatory field - A description of the profile
- **Allow clock-in to Create New Duties** - Select to ensure that Clock-in.com creates new duties as necessary. This must be enabled and the default values must be provided to allow a duty to be created as a shift
- **Default Hour Type** - Mandatory field - The hour type (for example normal, overtime etc.) that is used by default when duties are automatically created
- **Derive Pay Level From Employee?** - The Default Pay Level that is used when duties are automatically created for the given employee based on what's defined in their individual employee record
- **Default Duty Duration** - The default duration (in hours) that is used when duties are automatically created. The Default Duty Duration is used as part of the validation when creating a duty. The shift will only be created and the caller booked "on", if the window contains sufficient time to create a duty with the default duration before the end of the shift window
- **Auto Arbitrate Created Duties** - When selected, this option means that all duties will pass through Automatic Arbitration and use the Site or System wide Arbitration rules. If Auto Arbitrate Created Duties is not ticked then all duties will need to be arbitrated manually
- **Allow Open Posts to be Filled by Valid PIN** - If selected, this will allow the scheduling of Open Posts (i.e. those with no Employee assigned). When someone calls in with a Valid Personal Identification Number (PIN), they will be attached to the duty. If no duty can be found, if there is an auto duty create profile assigned to the site card and additionally this option has been selected, a new duty will be created based upon the profile.
- **Force Employee and Site Group Branch to match when filling open posts or creating new duties** - This check box relates to filling open posts and auto-creating duties. If Force Employee and Site Group Branch to match when filling open posts or creating new duties is selected, then the Branch that the Employee belongs to must match with the Branch of the Site Group that the SIN belongs to. If not ticked, then (for example) an Employee belonging to Branch "A" could fill an open post or auto-create a duty for a Site Card belonging to Branch "B"
- **Force Employee Pay Level to Match When Filling Open Posts** - This check box relates to filling open posts. If Force Employee Pay Level to Match When Filling Open Posts is selected, then when filling open posts, the employee's pay level defined in their record must match that of the duty, or they will not be considered for filling the post
- **Inactive?** - Select to make the profile unavailable elsewhere in Timegate. By default, this is active.


3. Select **Save**

This can now be added to a Site, as explained in "How do I create an Auto Duty Profile?" on the previous page

How do I set up an employee so that they can automatically create duties when they book on?

Auto Duty Create enables an employee to work on a Site (which is configured for Auto Duty Create) where a Duty does not currently exist for them. When they book on, the duty is automatically created. To enable this feature for an employee, open **Set Up | Employee**:



1. Select the employee you wish to enable **Auto Duty Create** for - select  next to their name
2. When their employee record loads, select the **Ops. tab**
3. Locate the Scheduling Information Section. Select **Auto Duty Creation?** Once ticked, the feature is enabled for the employee when they are working on sites that allow auto duty creation
4. Select **Save**

How is arbitration set up?

Arbitration can be set up at either a Timegate wide or at a **Site** specific level. If global default rules are being used, and an individual sets up site-level arbitration, the later will take precedence in terms of arbitration rules.

How do I set up an arbitration profile?

The settings from the **arbitration profiles** page determine which checks are performed when arbitrating a duty. Setting the arbitration profile options will ensure that any duties that are not performed as expected are flagged for review.



TIP: The tighter the criteria for passing a duty, the more duties that will have to be manually arbitrated. This will take more time for the user to complete the task. It's a fine balancing act between getting too many duties to arbitrate and not enough

A default arbitration profile has been set up and is used system wide by default. However, additional arbitration profiles can be configured to apply to one or more sites. The arbitration profiles are set up from the **Admin | General | Arbitration Profiles** page:

Arbitration Profile

Back Save

General

Name* Default Times

Description* Pay Actuals and Bill Operational

Active

Duty Checks ⓘ

Change of Employee

Change of Times

Change of Hour Type

Change of Pay Level

Manually Taken Off Calls ⓘ

Duty Start Checks

Minutes before ⓘ

Minutes after ⓘ

Duty Finish Checks

Minutes before ⓘ

Minutes after ⓘ

Duty Duration Checks

Minutes under ⓘ

Minutes over ⓘ

Default Times ⓘ

Pay Start	Actual	▼	Pay Finish	Actual	▼
Bill Start	Operational	▼	Bill Finish	Operational	▼

Once the page has loaded, select **+Add** to create a new one:

1. Enter a **Name** for your profile
2. Enter a **Description** for your profile
3. Ensure that your profile is **Active**
4. Configure the profile that comprises five further key areas as shown (these are detailed over the following pages):
 - **Duty Checks**
 - **Duty Start Checks**
 - **Duty Finish Checks**
 - **Duty Duration Checks**
 - **Default Times**
5. Select **Save**

Duty Checks

The settings in this part of the screen are used to configure the checks between the scheduled and operational phases of the duty. Each setting checks to see if there is a difference between the scheduled and operational phases for the given criteria (**Employee, Times, Hour Type** etc.)

Change of Employee	When selected, the system will check to see if the employee scheduled to undertake a given duty is the same as the employee undertaking the duty in the operational phase. If they're different, there will need to be a manual arbitration of the duty
Change of Times	When selected, the system will check to see if the scheduled times for a duty match the actual time created in the operational phase. If they're different, there will need to be a manual arbitration of the duty
Change of Hour Type	When selected, the system will check to see if the scheduled hour type for a duty match the actual hour type in the operational phase. If they're different, there will need to be a manual arbitration of the duty
Change of Pay Level	When selected, the system will check to see if the scheduled pay level for a duty matches the actual pay level in the operational phase. If they're different, there will need to be a manual arbitration of the duty
Manually Taken Off Calls	If an Off Call has been manually taken, there will be a need to undertake a manual arbitration of the duty

Duty Start Checks

In this section, two rules can be configured:

- **Duty Start Checks - Minutes Before** – This rule states that if a duty is started within the time between the duty operation start time and that time minus the stated minutes, arbitrate the duty automatically. Pay and bill start will be set to your defined duty phases. If the duty is started before this time frame, then the duty will be placed into arbitration to be manually check
- **Duty Start Checks - Minutes After** – This rule states that if a duty is started within the time between the duty operation start time and that time plus the stated minutes. arbitrate the duty automatically. Pay and bill start will be set to your defined duty phases. If the duty is started after this time frame, then the duty will be placed into arbitration to be manually check

Minutes Before	Select to enable, and configure the Duty Start Checks - Minutes Before arbitration rule
Minutes After	Select to enable, and configure the Duty Start Checks - Minutes After arbitration rule
Numeric value	Number of minutes that the rule is valid for

Pay Start Select whether to Pay **Actual** or **Operational** for the rule

Bill Start Select whether to Bill **Actual** or **Operational** for the rule

Duty Finish Checks

In this section, two rules can be configured:

- **Duty Finish Checks - Minutes Before** – This rule states that if a duty is finished within the time between the duty operation finish time and that time minus the stated minutes. Then the pay and bill start will be set to your defined duty phases. If the duty is finished before this time frame, then the duty will be placed into arbitration
- **Duty Finish Checks - Minutes After** – This rule states that if a duty is finished within the time between the duty operation finish time and that time plus the stated minutes. Then the pay and bill start will be set to your defined duty phases. If the duty is finished after this time frame, then the duty will be placed into arbitration

Minutes Before Select to enable, and configure the **Duty Finish Checks - Minutes Before** arbitration rule

Minutes After Select to enable, and configure the **Duty Finish Checks - Minutes After** arbitration rule

Numeric value Number of minutes that the rule is valid for

Pay Finish Select whether to Pay **Actual** or **Operational** for the rule

Bill Finish Select whether to Bill **Actual** or **Operational** for the rule

Duty Duration Checks

In this section, two rules can be configured:

- **Duty Duration Checks - Minutes Under** – This rule states that if a duty's taken duration is within the time frame under the official duty duration minus the stated minutes. Then the start and finish pay and bill will be set to your defined duty phases. If the duty's taken duration is under this set time, then the duty will be placed into arbitration
- **Duty Duration Checks - Minutes Over** – This rule states that if a duty's taken duration is within the time frame over the official duty duration plus the stated minutes. Then the start and finish pay and bill will be set to your defined duty phases. If the duty's taken duration is over this set time, then the duty will be placed into arbitration

Minutes Under Select to enable, and configure the **Duty Duration Checks - Minutes Under** arbitration rule

Minutes Over Select to enable, and configure the **Duty Duration Checks - Minutes Over**

arbitration rule

Numeric value	Number of minutes that the rule is valid for
Pay Start	Select whether to Pay Actual or Operational for the rule
Bill Start	Select whether to Bill Actual or Operational for the rule
Pay Finish	Select whether to Pay Actual or Operational for the rule
Bill Finish	Select whether to Bill Actual or Operational for the rule

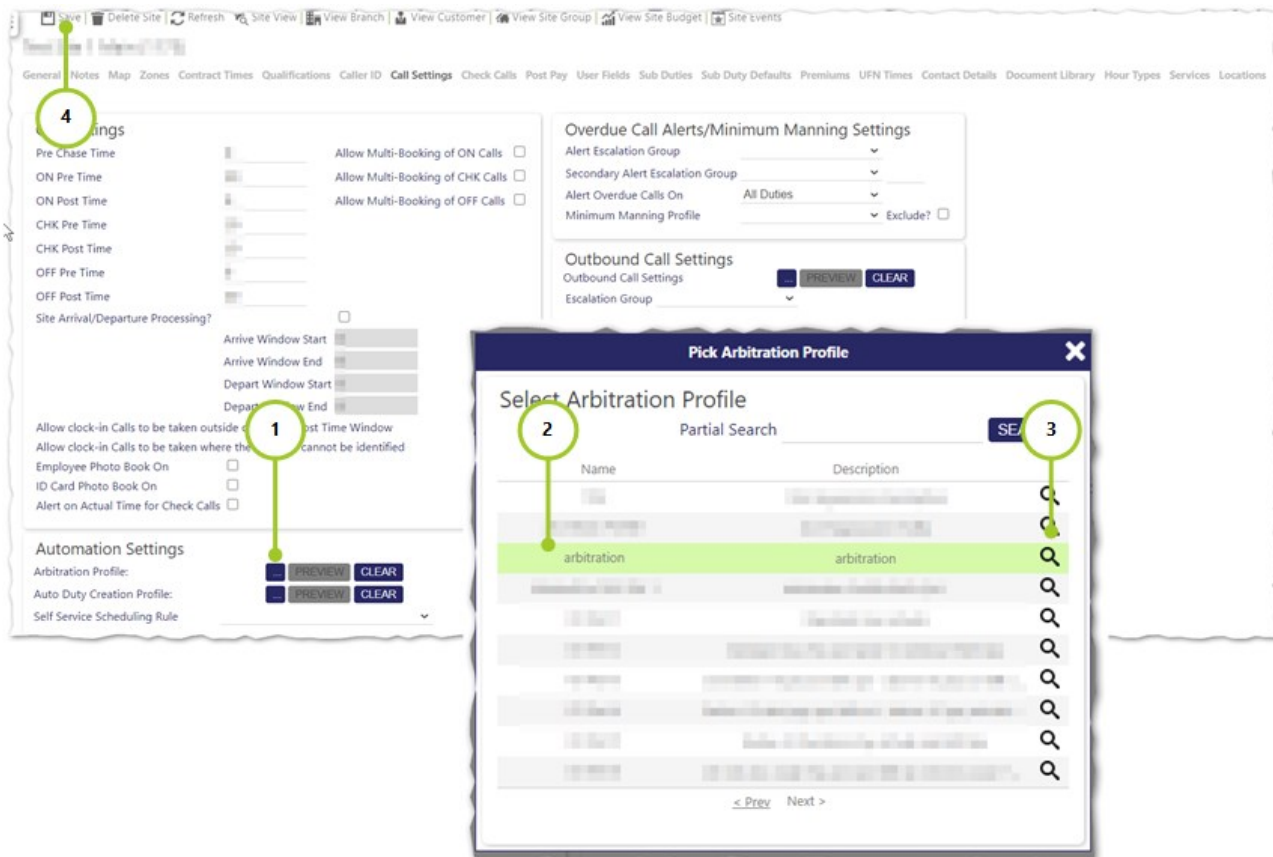
Default Times


If there is no way to derive the start or the end times for arbitration, set any times not set, using these start and end times. This ensures that a duty that has passed arbitration has a set start and finish, pay and bill phase

Pay Start	Select whether to Pay Actual or Operational for the rule
Bill Start	Select whether to Bill Actual or Operational for the rule
Pay Finish	Select whether to Pay Actual or Operational for the rule
Bill Finish	Select whether to Bill Actual or Operational for the rule

How do I configure arbitration for a specific site?

To configure arbitration for a specific site, you must go to the **Set Up | Sites | Call Settings** specific to a site - an example is shown below:



1. Select [...] to open the **Pick Arbitration Profile** page
2. Select the arbitration profile that you wish to use
3. If you are unsure of the way that the profile is configured, select  to preview the profile
4. Once the arbitration profile has been selected, select **Save**

TESTING - CHECKING THAT IMPORTING IS WORKING CORRECTLY

When importing your content using the Timegate/TemplaCMS interface, it's important to check that the values are being copied across correctly from TemplaCMS into Timegate via the Data Warehouse. The following settings should be checked:

Sites

- Ensure all **Sites** have been created
- Within the **Sites**, check:
 - The **General tab** to ensure that the **Site Code, Customer, Site Card ID Number** and **Site Name** are correct
 - The **Caller ID tab** to ensure that the **Caller ID numbers** have been copied over from the **TemplaCMS Site telephone numbers**. If they have not, they can be entered manually (see How can I set up the Telephone Numbers from which Calls are allowed?)

Employees

- Ensure **Employees** have been created with a **Branch name, Surname, First Name, Email Address, Mobile Telephone, PIN, Date of Birth, Date Joined, Gender** and **Full/Part Time** values in the **General tab**
- Within the **Employee** records check:
 - The **General tab** to ensure that the **PIN Number** is set to the **Payroll Number** from **TemplaCMS**
 - The **Ops tab** to ensure that the **Auto Duty Create?** has been enabled from the **Employee Template** allowing the employee to book on when they have not already got a duty

Duties

Additionally, it is important to check that the data for duties is coming across correctly. From within the **Site view (Plan | Sites)** you should be able to do a visual check to see that the duties are coming across. For each duty checked, select it, ensure that the times are correct along with an **Hour Type** of **REG (Regular Contract)**. There is no need to look at **Pay levels** etc. as this will be managed in **TemplaCMS** for versions 1 and 2.

FEATURES AND FUNCTIONALITY (TIMEGATE USER GUIDE EXTRACTS)

In this section of this Timegate/TemplaCMS Guide, you will be able to explore some of the features and functionality that is available through Timegate for Timegate/TemplaCMS interface users. Information is provided about the following areas:

- "Managing Exceptions by Arbitration (P12)" on the next page
- "Duty Monitoring & Management (P10)" on page 41
- "Scheduling (P8)" on page 48
- "Reports (P14)" on page 63
- "Employee Set Up (P7)" on page 65
- "Site Set Up (P6)" on page 68
- "Escalation Groups (P25)" on page 78

MANAGING EXCEPTIONS BY ARBITRATION (P12)

What is arbitration?

Timegate uses the Call Monitor system to control booking-on, booking-off and check calls. Therefore, all of the ON/OFF/CHK times, change of employees, change of call times, added duties and deleted duties made in Call Monitor can be recorded against the scheduled duty. Arbitration is the term used in Timegate for managing exceptions. When duties are processed, Timegate automatically makes the checks to see if they were performed within the acceptable tolerances (that have been set up either locally at a site level or globally across Timegate). If the duty passes the checks, it is referred to as an arbitrated duty. Should a duty have been performed, but it falls outside of the acceptable tolerances, Timegate determines it to be unarbitrated. An unarbitrated duty can be arbitrated using human intervention within Timegate. This intervention is referred to as manual arbitration. The process involves understanding why the duty failed the Timegate checks and applying business decisions as to how the duty will be recorded in terms of billing and payment. You may be required to alter the amount you bill and pay for a duty manually, before you arbitrate it within Timegate.

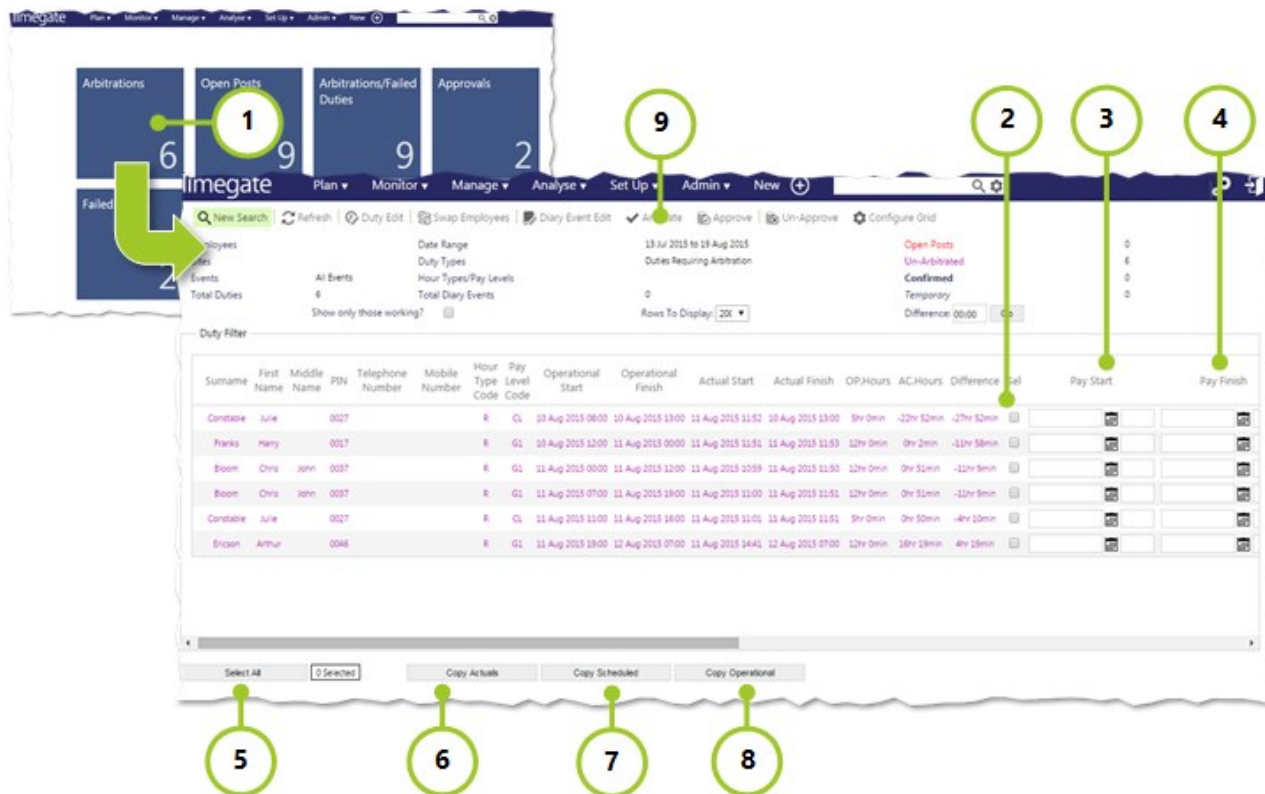
How are unarbitrated duties manually arbitrated?

- You can manually arbitrate unarbitrated duties through the **Duty filter**. There is a short cut specifically that shows **Unarbitrated duties** in the **Duty Filter**. This can be displayed on the Timegate **To-Do List**.
- Alternatively you can select **Manage | Duties** or **Plan | Duties** to access the filter and search on your specific needs.
- Another way to arbitrate duties is through the **Site View (Plan | Site)**, where you edit the duty with the pay and bill details, then select **Arbitrate Duty** and **Save**.
- Finally, you can arbitrate duties in **Site Teams (Plan | Site Teams)** in the same way as you can in **Site View**.

How do I arbitrate in the Duty view?

Arbitration from within the Duty view (accessed using short cut)

The following steps will enable you to arbitrate unarbitrated duties:



1. Select **Arbitrations** from the main Timegate screen (if you do not have this button you will need to configure the screen - **Settings Cogs** ([User Settings](#)) from the top right-hand side of the screen where this can be made visible)
2. Select the individual duty that you wish to arbitrate (you can select multiple by selecting **Select All** - step 5)
3. Enter **Pay Start** time
4. Enter **Pay Finish** time (the scroll across and do the same **Bill Start** and **Bill Finish** times)
5. Select **Select All** to make bulk arbitrations
6. Select **Copy Actuals** to copy the actual hours into the pay and bill fields of the records selected
7. Select **Copy Scheduled** to copy the scheduled hours into the pay and bill fields of the records selected
8. Select **Copy Operational** to copy the operational hours into the pay and bill fields of the records selected
9. Select **Arbitrate**

Arbitration from within the Duty view (using the Duty Filter Wizard)

There are several different ways to search for duties using the **Duty Filter Wizard**, which is launched when you open the **Manage | Duties** or **Plan | Duties** pages or select **New Search** within the **Duty Filter** results page. These are by **Employees**, **Site**, **Date Range**, **Duty Types**, **Pay and Bill** and **Events**. By default, when the **Duty Filter Wizard** is launched, the **Employees** screen is opened as shown:



From the screen, you can search for duties as follows:

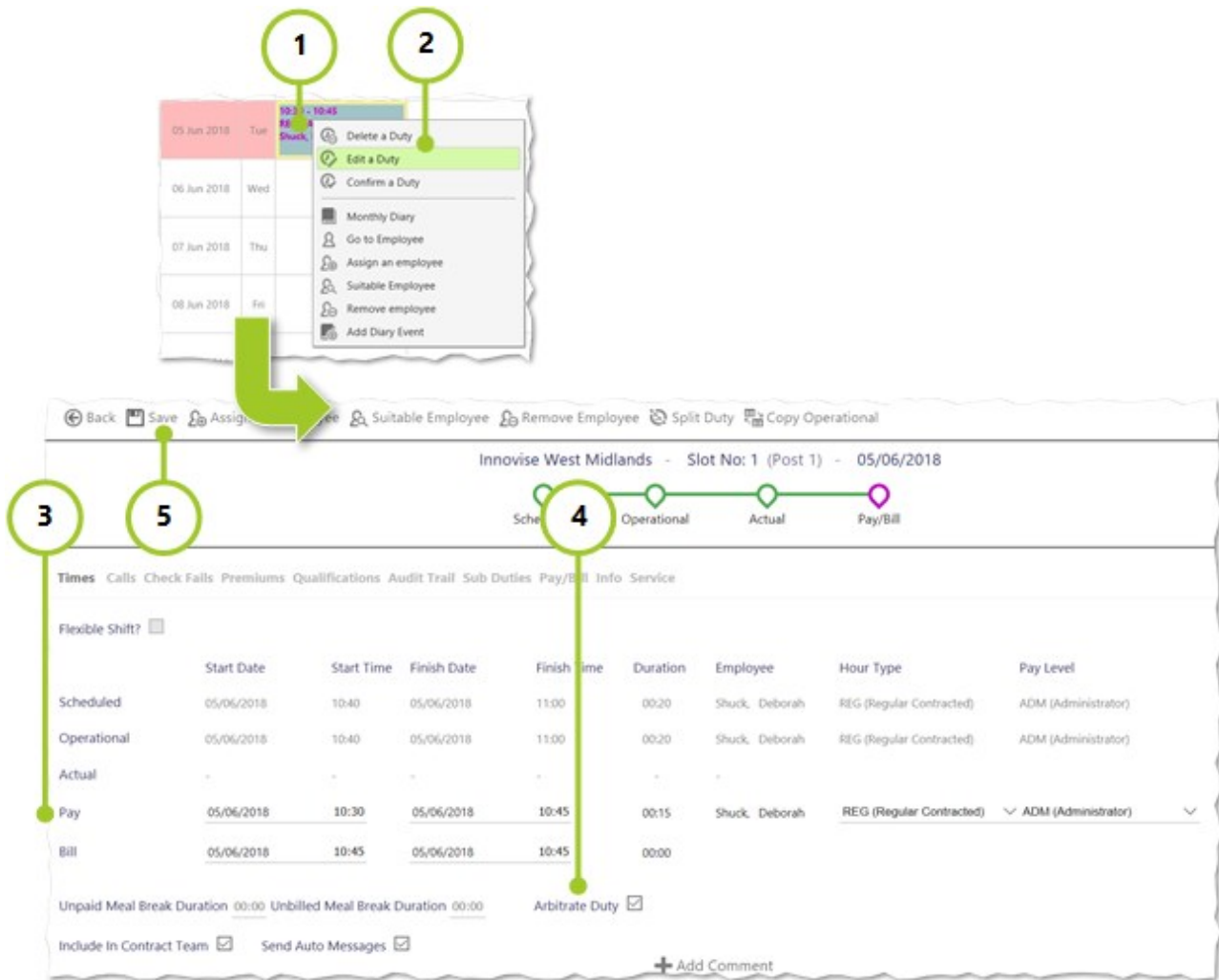
1. Select the filter you wish to apply for your search from the choices of **Employees, Site, Date Range, Duty Types, Pay and Bill** and **Events**
2. Using the radio buttons, boxes, pop up selection boxes and buttons, set your filtering criteria
3. Select how you wish to view your results:
 - **All Duties (No Grouping)** - This is the default for running a filter without specifying a grouping
 - **All Duties/Diary Events (Grouped by Employee)** - This option allows you to group a filter by Employee
 - **All Duties (Grouped by Site Card)** - This option allows you to group by Sites
4. Select **Search** to start filtering/searching duties which will be shown in the **Duties View**

Once the results have launched in the **Duties View**:

- Select the individual duty that you wish to arbitrate
- Enter **Pay Start** time
- Enter **Pay Finish** time (the scroll across and do the same **Bill Start** and **Bill Finish** times)
- Select **Select All** to make bulk arbitrations
- Select **Copy Actuals** to copy the actual hours into the pay and bill fields of the records selected
- Select **Copy Scheduled** to copy the scheduled hours into the pay and bill fields of the records selected
- Select **Copy Operational** to copy the operational hours into the pay and bill fields of the records selected
- Select **Arbitrate**

How do I arbitrate from Site View?

From within the Site View (**Plan | Site**), you can arbitrate duties as follows:



1. Select the **duty** to be arbitrated (unarbitrated duties are displayed in purple)
2. Once the **duty** is selected, there are three options for editing it:
 - Double-click on the duty within the grid with the left-hand mouse button
 - Right-click on the duty within the grid and select **Edit a Duty**
 - Select the duty within the grid and select **Edit a Duty** in the button bar
3. Enter the **Actual Pay** and **Bill** values (**Start Date**, **Start Time**, **Finish Date**, **Finish Time**) along with the **Hour Type** and **Pay Level**. Alternatively, you can select **Copy Operational** to copy the details across into these fields
4. Select **Arbitrate Duty**
5. Select **Save**

How do I arbitrate from Site Teams?

From within the **Site Teams (Plan | Site Teams)**, you can arbitrate duties as follows, in the same way as you did in **Site View**:

- Select the **duty** to be arbitrated (unarbitrated duties are displayed in purple)
- Once the duty is selected, there are three options for editing it:
 - Double-click on the **duty** within the grid with the left-hand mouse button
 - Right-click on the **duty** within the grid and select **Edit a Duty**
 - Select the **duty** within the grid and select **Edit a Duty** in the button bar
- Enter the **Actual Pay** and **Bill** values (**Start Date**, **Start Time**, **Finish Date**, **Finish Time**) along with the **Hour Type** and **Pay Level**. Alternatively, you can select **Copy Operational** to copy the details across into these fields

- Select **Arbitrate Duty**
- Select **Save**

How do I approve duties?

The system can approve a duty or a set of duties once they have been through the rate generation process.

Once a duty has been approved, it cannot be edited in any way (i.e. the start/finish time, premiums, meal breaks, premiums, sub duties etc. cannot be edited). For an approved duty to be edited, it must first be un-approved.

The **Site View** below shows all of the duties that have not been approved. This task can also be completed from the **Duty Filter**:

You have the choice to select an individual activity to approve, or you can bulk approve duties. To approve a single duty, select it and then select **Approve** (1 below). To approve multiple duties, select **Bulk Duty Approve** (2 below).



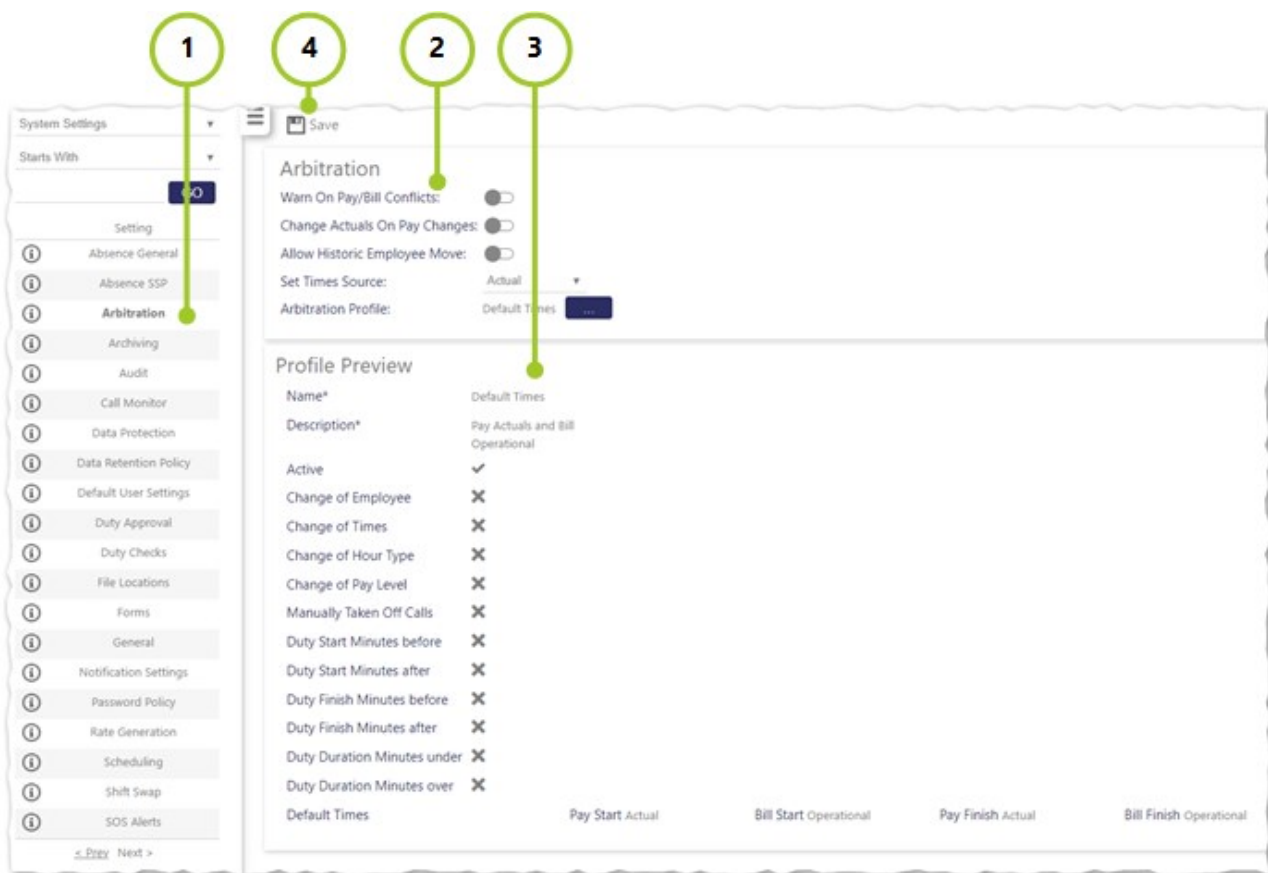
The Bulk Duty Approval dialog box will be displayed. Select **Yes** to approve all duties. An additional, approved icon will be added to the duty as shown below:



When a duty is approved an approval date/time will be written to the duty. The pay extract will use this date to decide what duties have been approved since the last time the process ran and only pick up ones approved since. If an historic duty is then approved, the approved date will be greater than the last extract run time and so will be picked up in the next extract run.

How do I set up arbitration at a Timegate wide level?

Arbitration is set up at a Timegate system level from the **Admin | System | System Settings | Arbitration** screen as shown. Follow the steps to set up your arbitration:



1. Select **Arbitration** from the menu on the left of the screen
2. Now, configure your arbitration settings as follows:
 - **Warn on Pay/Bill Conflicts** - If a user changes historical duties, the duty check always uses the Operational Employee to check that 2 duties are not “double booked” by the same employee for overlapping times. However, the user is still able to change the Pay/Bill employee to be any person, and potentially that employee could already be working on another site during the same times. If this occurs, then the system setting will warn the user that overlapping pay information is being created for the employee
 - **Change Actuals on Pay Changes** - If selected, then if a user will get a prompt for “Do you want these pay changes to become actuals?” when they alter the pay start/finish times against an

arbitrated duty. If the user says “Yes”, then the new pay start/finish times are copied to the actual times

- **Allow Historic Employee Move** - Enables an employee to be moved from one shift to another during arbitration
- **Set Times Source** - to speed up arbitration and copy the hours to the pay and bill times, you can choose from the Operational or Actual times
- **Arbitration Profile** - select which one you wish to use by selecting [...]
- The default (or selected) profile is shown in a preview pane at the bottom of the screen. To edit the profile, go to the **Admin | General | Arbitration Profiles** page as detailed in the previous section

3. Select **Save**

DUTY MONITORING & MANAGEMENT (P10)

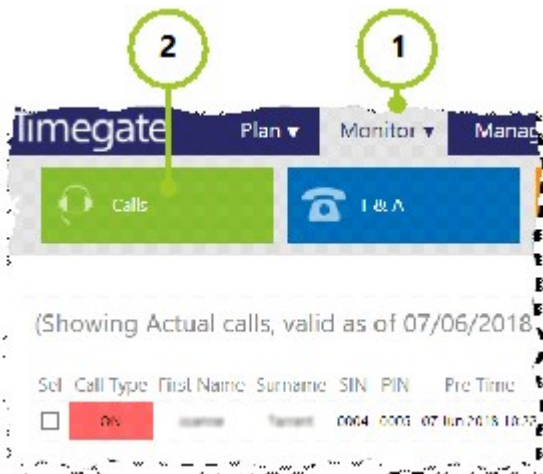
What is Call Monitor?

The **Monitor | Calls** page, referred to hereafter as the **Call Monitor** is a highly configurable real-time system used by supervisors, which displays (and accepts) all book on, book off and check calls at all stages of their progress, from the call being due to the call being finished. Call Monitor provides you with the functionality to:

- Manually take a call
- Receive a call via telephone/biometric devices
- View the relevant branch, site group, site, customer or employee for a call
- **Add/Edit/Delete** a duty
- Allocate/De-allocate/Find the most suitable employee for a duty
- Filter which calls you wish to monitor, by either site and/or call type (On, Off or Check)
- Go to **Duty view** or **Employee Diary**
- View employee contact details
- Create notes
- Flag calls that have been escalated to management as being “Manager Aware”
- Raise an incident (requires Service)

How do I Access Call Monitor

You can get to **Call Monitor** by following these steps:



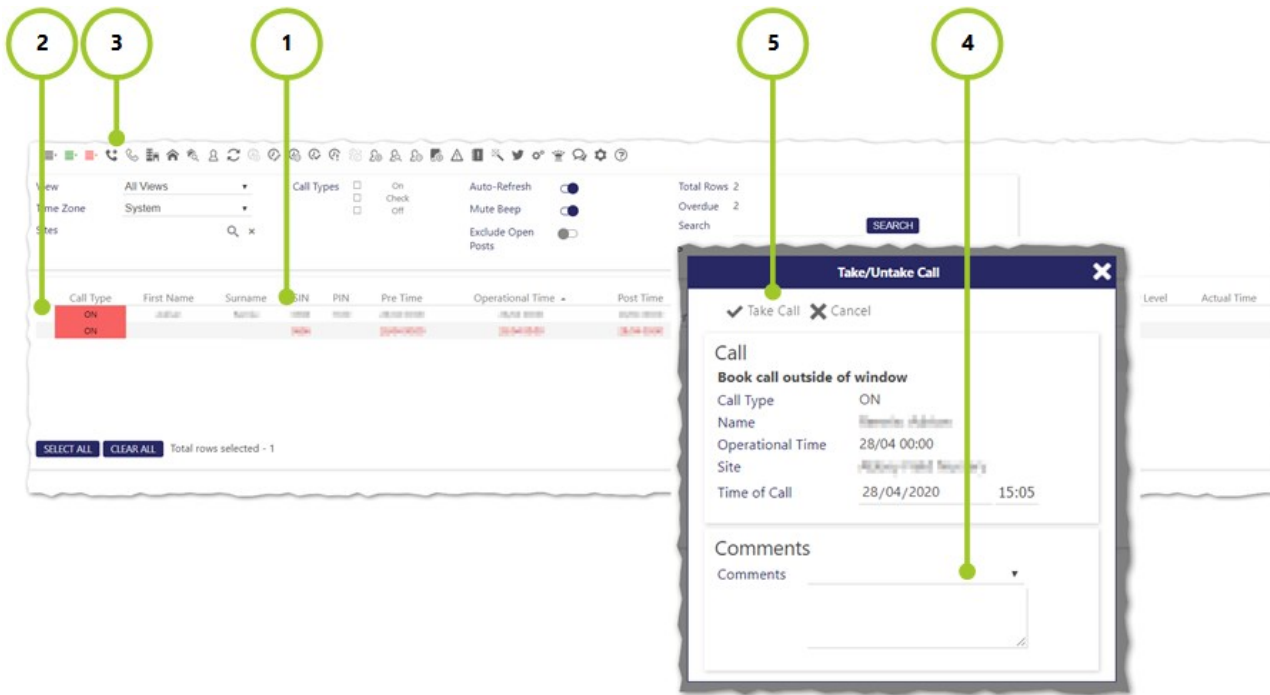
1. From the **Menu Ribbon**, select **Monitor**
2. From the **Monitor** sub-menu select **Calls**

How do I manually take an ON call outside of the pre/post pay window?

To manually take a call that has been missed, and to find out how to use the search bar to look for employee, take a look at this clip:

If an employee can't **Book ON** or **Book OFF** and you have to manually do it, follow this video to see how to do it for them:

The following steps will enable you to manually take an ON call from outside of the pre/post pay window:



1. From within the **Call Monitor**, look at the different calls in the list. If a duty is outside of the pre/post window the **Call Type** will be highlighted in red.
2. Select the call (or multiple calls)
3. Select **Take Call** (telephone with a + icon)
4. Select **Optional Comments** from the drop-down list
5. Select **Take Call** from dialog box

How do I manually take an ON/OFF or Check call inside of the pre/post pay window?

The following steps will enable you to manually take an ON/OFF call from inside the pre/post pay window:

From within the Call Monitor, look at the different calls in the list. If a duty is inside of the pre/post window the Call Type will be highlighted in either white or yellow

- Select the call, or multiple calls
- Select **Take Call**
- Select **Optional Comments** from the drop-down list
- Select **Take Call** from dialog box. This will automatically book the call on, providing you book the call on within the Pre/Post time window. **When you have booked the call on successfully the colour of the ON field will change to green**

Follow the above instructions for CHK calls

How do I fill an open post?

The following clip shows you how to fill an open post - it includes details about how to search for **Suitable Employees**:

From the **Call Monitor**:

- Select the Call that needs to have a post filled.
- Once selected, select **Duty Edit**

- From the **Duty Edit** screen, you can select either:
 - **Assign an Employee**- See "How do I add an Employee to a Duty?" on page 60 for further information
 - or **Suitable Employee** - See How can I do a search for employees that are available (suitable employees)? for further information

How do I edit calls?

Editing a call is done by:

- Selecting the call
- Selecting **Duty Edit**

For further details about editing duties can be found in the "Scheduling (P8)" on page 48 part of this guide

How do I raise a note?

Select a call and select the **Note Wizard**. The following screen will be displayed, from which an Incident for the Employee, the Site or both can be created by following these steps:

The screenshot shows the 'Create Incident' form with the following sections and callouts:

- 5**: 'Create Incident' button at the top left.
- 1**: 'Who / Where?' section containing 'Employee' and 'Site' fields with dropdown menus.
- 2**: 'Log Against?' section with radio buttons for 'Site', 'Employee', and 'Both', and a 'Status' dropdown menu.
- 3**: 'What?' section with a 'Job (General Job)' dropdown, an 'Incident' radio button, and a table for 'On Site Times' with columns for 'Start' and 'Finish'.
- 4**: 'Alarms' section with checkboxes for 'Employee Alarm' and 'Site Alarm', and 'Make Public' options for each.

1. Check the note details - if you wish to change the site that has been ported over from the **Call Monitor**, select **Site**
2. Select where to log the note against (multiple notes will be created if **Site** and **Employee** are both selected using the Radio buttons)
3. Add the note specific details including what type of note it is from the drop-down menu
4. Configure any alarm settings
5. Select **Create Note**

How do I view and interrogate T&A data?

The T&A (Time and Attendance) Monitor displays a list of calls received from Clock-in.com, biometric/card devices (when they are used by an organisation) and the employee app. The system records all calls whether they are valid or invalid. The T&A Monitor Screen is not editable. It is designed only to show summary T&A information. The user can, however, select **Search** to find and view historical information.

What are maps?

Maps provide visual representations of employee duties over time. The information visually represented includes (dependent upon your company's licensed Timegate products):

- Sites and their associated Geofences
- Where On/Off/Check Calls are made
- Where Incidents are raised
- The different Guards on the Tours
- Forms as they are being completed
- Briefing notes once they have been read
- Heartbeats - geographic coordinates at pre-determined intervals as a duty is undertaken
- Where an SOS call is made

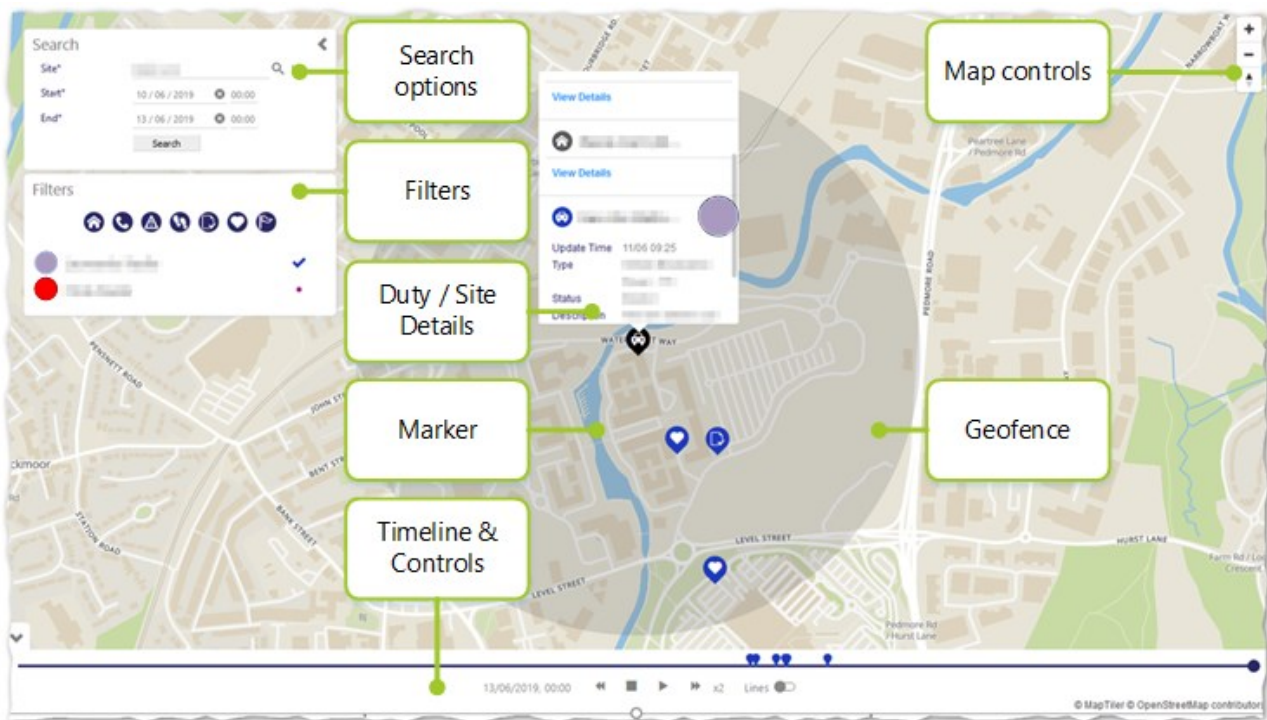
How do I access maps?

There are two ways to access maps:

- Directly from **Monitor | Map**. When accessing maps this way, you will need to determine using the search and filter options which items to display on a map
- From a **Duty edit/view/add** screen, by selecting the **View Map**. When accessing maps this way, you will see all duties not just the one you have been viewing, for the selected site in the last 24 hours

How do I use maps and what are the different markers?


The following screen is an example a map and some of the content that you are likely to come across when using it:



When using maps, it's important to understand the search options and filters in order to display the information that you are looking for.

Search Options

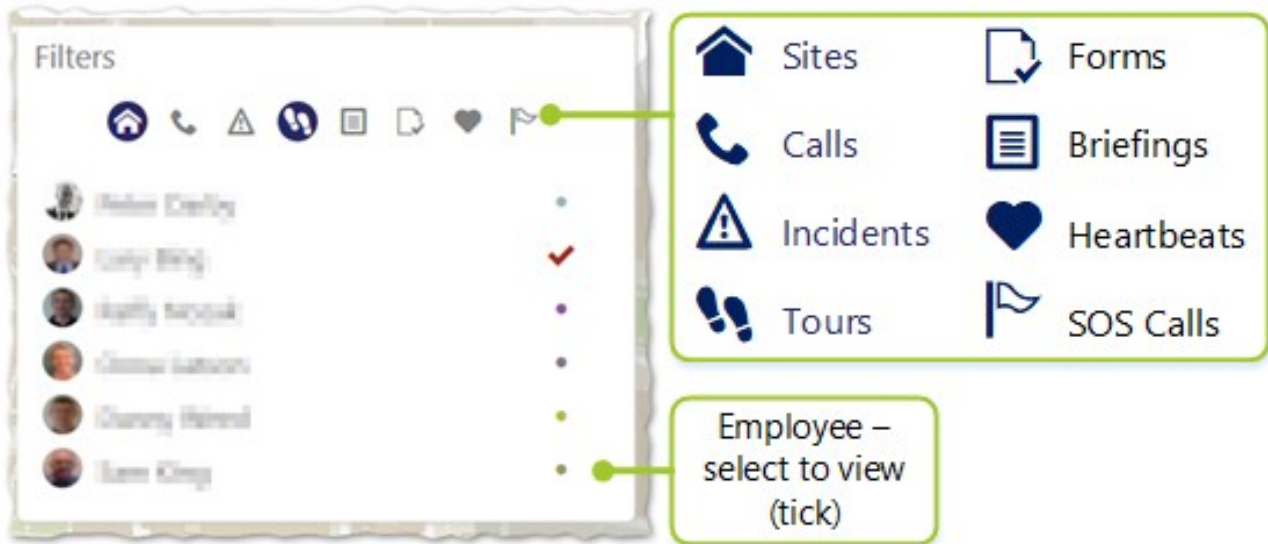
The Search part of the screen enables you to search for the **Site** or multiple **Sites** you want to view:

- Select the  to search for a **Site** or multiple **Sites**
- Select a **Start date**

- Select an **End date**
- Select **Search**

Select < to expand and hide the Search part of the screen. After selecting the site, it is time to filter the information to meet with your needs.

Filters



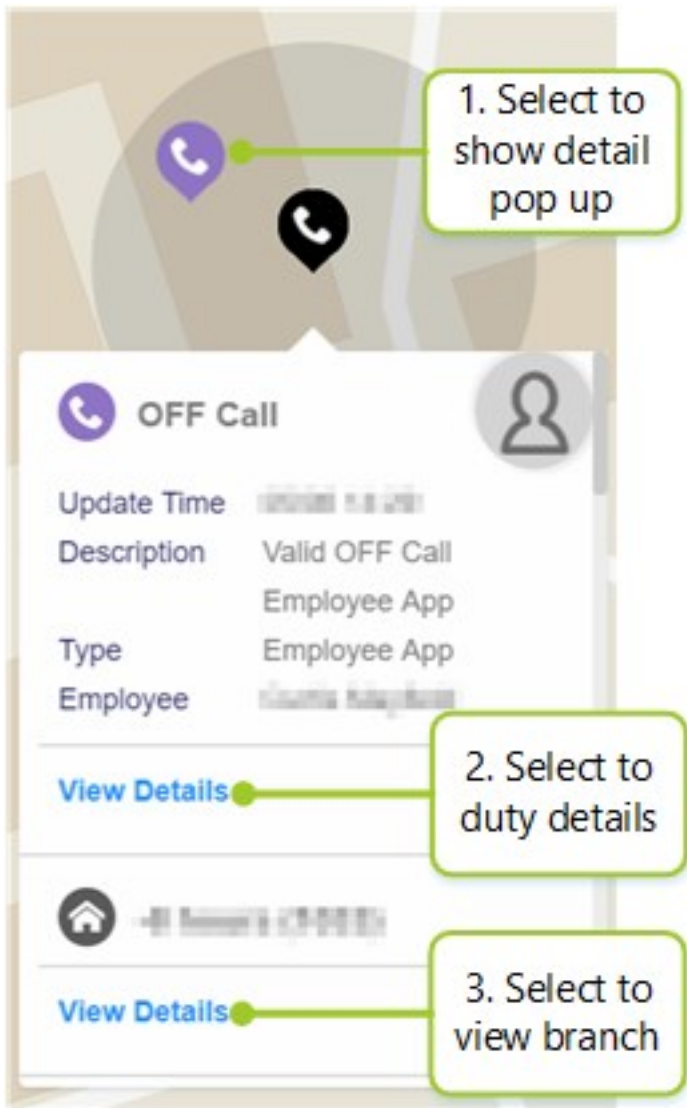
The **Filters** part of the screen comprises a series of filters/markers along with a series of employees. Select/deselect the employees and markers/filters you wish to either show or not show on the map. Employees are designated a unique colour to represent their actions on the map and thus differentiate them from their other colleagues. Multiple employees and their associated activities are shown using a black multi-marker. They share the exact same GPS coordinates (but may be at a different time). When more than one marker is stacked in the same place, a black multi-marker is shown. Sites by default have a grey marker. As the list of employees expands, they can be scrolled through down the screen.



Please Note: The functionality and availability of filters is dependent upon software licensing.

Map

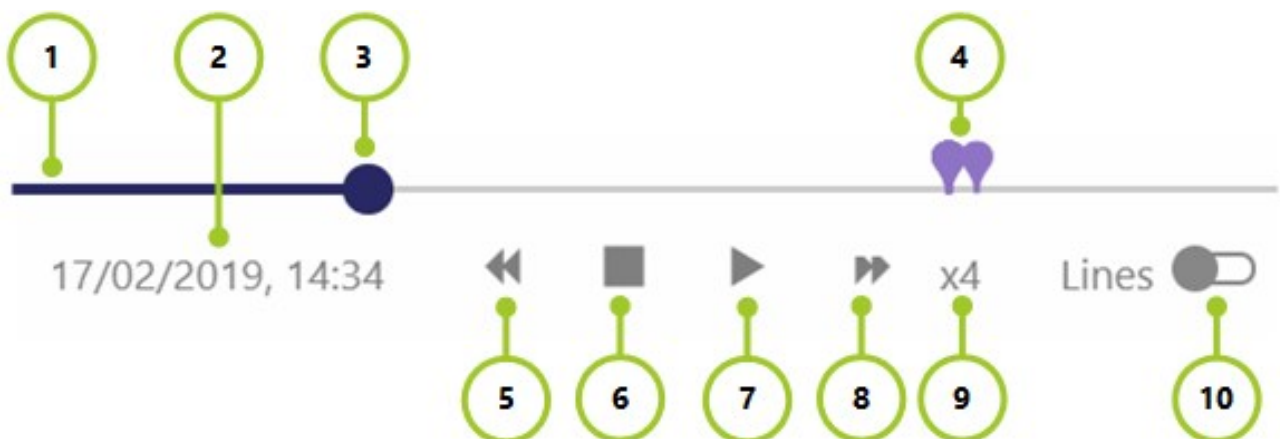
The map can be scrolled around and zoomed in and out of, either by using the mouse wheel or the **Map Controls**. Markers can be selected on the map to view further information as shown below:



In this example, an OFF Call has been made. The time of the OFF call is recorded, along with a description and the way in which the OFF Call has been made (i.e. via the Employee App). The Employee’s name is also shown, along with links to “View Details”. From here the Duty details can be viewed or the Site details.

How do I play a duty using a map?

Maps are not static. Their data changes during the course of a duty. The Timeline and its associated controls enable you to step through/play out the duty related information on the map screen. The controls are explained below.



1. **Timeline** - progress is represented using a thick blue bar. Unplayed content is shown as a thin grey line. You can hover on the timeline to see the time at any point. This is in addition to the time shown below the timeline (2 below).
2. **Date and Time** - this shows the date and time of the recording. Be aware that there is an overall duration limit of 30 days for maps
3. The dot indicates the **play head**. This shows where in the timeline is presently being played. The dot can be selected and dragged along the timeline as required to jump around the duty (i.e. go back/forwards in time)
4. **Coloured pointers** on the timeline relate to when various duty related actions take place (those that you can filter by). The different colours relate to the various employees whose details are being displayed. Each employee has their own unique colour
5. **Rewind**. Select multiple times to toggle the speed of rewinding (e.g. x2, x3 and x4)
6. **Stop**
7. Toggles between **Play** and **Pause**
8. **Fast forward**. Select multiple times to toggle the speed of fast forwarding (e.g. x2, x3 and x4)
9. **Speed of Fast Forward and Rewind** (e.g. x2, x3 and x4)
10. Toggle to **add/remove lines** to the map between different duty related actions on a duty.

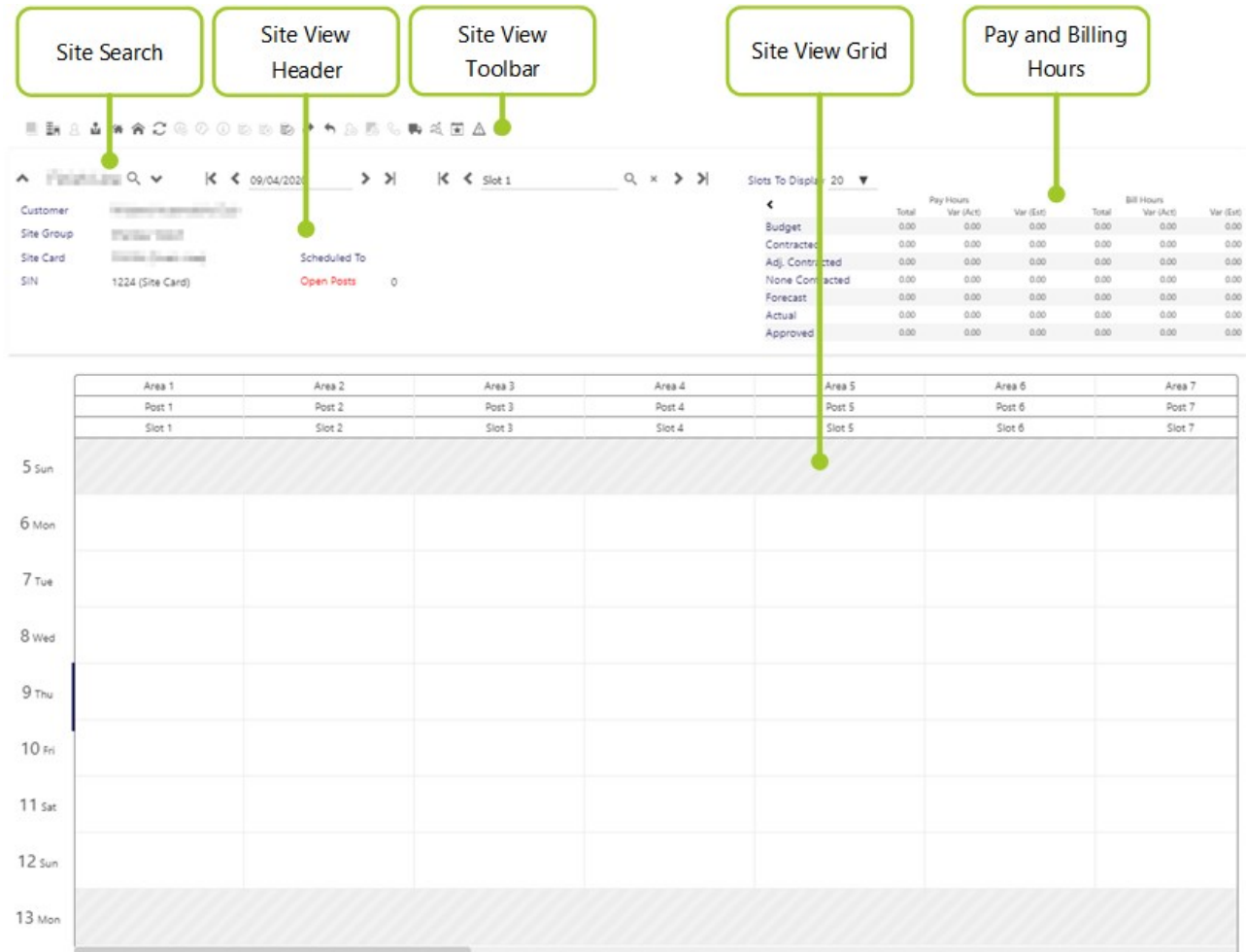


Please Note: The **Lines** control is disabled when there are more than 100 points or the duration is greater than 24 hours. When the lines are disabled the control will be visible on screen, but when hovered over, it will show a message to why it can't be enabled

SCHEDULING (P8)

How can I schedule in Site View?

The site schedule can be accessed by selecting **Plan** from the main menu, followed by selecting **Site** from the sub menu. Next, select the site you wish to view from those on the left-hand side of the screen. The **Site View Grid** (similar to the one below will be displayed):





Site View grid

This grid shows a whole week of duties for a site. Down the left hand side of this grid are the days and dates for the week being shown. Today's date is highlighted with a blue line. Along the top of the screen are the duty slot numbers 1, 2 etc. (or headers, depending upon how they have been configured). Each duty slot (shown as a "cell" that's underlined) holds details for one duty. It shows start time, finish time, hour's type, pay level and employee allocated to that duty. A duty, or multiple duties can be selected by clicking on them with the left-mouse button. Once selected, they can be actioned using the context sensitive choices on the toolbar (see Site View Toolbar for more information). A context sensitive right-hand mouse button option list is available too. This comprises those actions that can be undertaken on the selected duty/duties. Additionally, drag-and-drop is supported. For example, a duty can be selected with the left-hand mouse button and dragged into another slot. Any necessary validation will take place regardless of how duties are modified/added etc.


Site Search

The Site Search bar can be split into two parts, one for searching for Sites, the other for searching for specific Slots on given days.

Searching for a site is simple using the Site Search functionality. Select either:

- Select  to show a list of previously visited sites in a drop down menu. Select the site of choice from the list
- Select  to open the **Select Site** window, and choose a site from the pop-up view
- Select **Search**

The second part of the search toolbar is used to find slots on given days:

- Select the **Date** that you wish to search on/from, and an appropriate the **Slot**
- Select  to select a slot from the pop-up view
- Select **Search**.

You can also choose how many slots that you display on the screen at any one time (using the **Slots To Display** drop-down list). By default, this is set at **20**.

Site View Header

The Site View Header comprises a summary of **Customer** name, **Site Group**, **Site (including the SIN)**, the last date to which RotaLoad has been completed, and the number of open posts for the week currently displayed.

Site View Toolbar

The following are the various buttons on the quick access toolbar - these will be explained in more detail to you as you work through this section of the guide:



1 Employee diary

2 Branch details

11 Duty info

12 Confirm duty

21 Assign an employee


22 Suitable employee

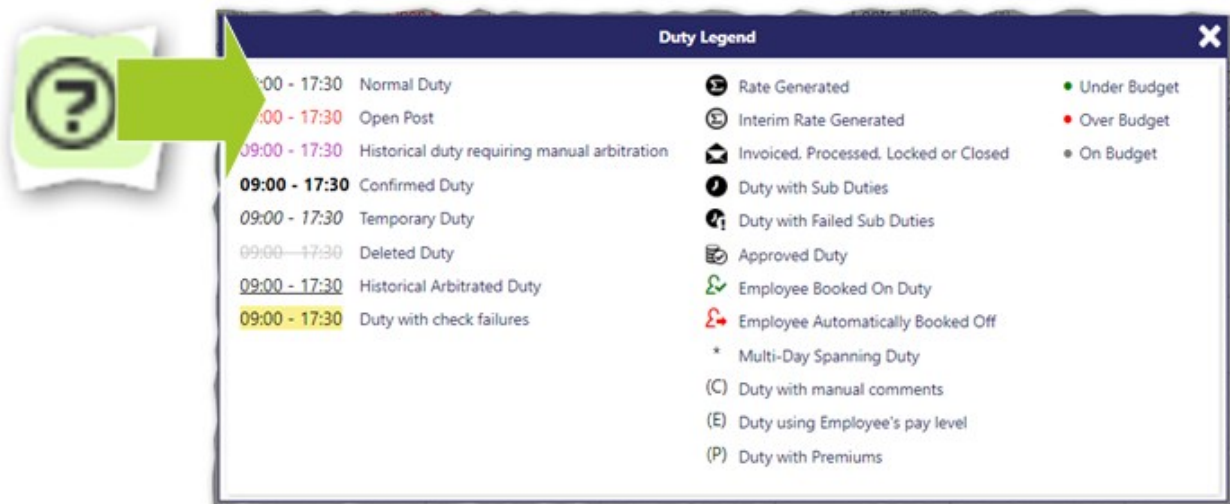
- | | | |
|--------------------|------------------------|-----------------------|
| 3 Employee details | 13 Temporary duty | 23 Remove employee |
| 4 Customer details | 14 Approve duty | 24 Add diary event |
| 5 Site group | 15 Un-approve duty | 25 Contact details |
| 6 Site | 16 Bulk approve duties | 26 Supplier reference |
| 7 Refresh view | 17 Make contracted | 27 Site teams |
| 8 Add duty wizard | 18 Swap employees | 28 Events |
| 9 Delete duty | 19 Rotaload | 29 Create incident |
| 10 Edit a duty | 20 Unrotaload | 30 Configure slots |
| | | 31 Legend |

Pay and Billing Hours

This collapsible part of the screen provides summary information including budgeted hours, contracted hours, adjusted contracted hours, forecast hours, actual hours and approved hours. This is for both pay and bill hours. The same type of information can be accessed in the Site Teams view. Using this information, you can track spending and undertake budget reviews. Access to this functionality is controlled by a security item, so it can be turned on and off for specific roles. By default, budget information is not expanded (shown on screen) - it can take a while to load and also takes up a large proportion of the screen.

Legend

The following legend, accessed by selecting  from the quick access toolbar explains the schedule components:



How can I configuring the Area/Post/Slot headings?

From within the **Select Slots** settings page, accessed by selecting **Configure Slots** on the toolbar, the user can rename the area, post and slot heading into something that is more suitable for their business as shown:

A 1. Select Configure Slots

B 2. Select Slot(s) to configure

Slot Number	Slot Name	Post Name	Area Name	Duty Day Name	Covers Post?	Holiday Lockdown?	Gender Types
1	Slot 1	Post 1	Area 1				
2	Slot 2	Post 2	Area 2				
3	Slot 3	Post 3	Area 3				
4	Slot 4	Post 4	Area 4				
5	Slot 5	Post 5	Area 5				
6	Slot 6	Post 6	Area 6				

C 6. Select to Save

Slot Number	Slot Name	Post Name	Area Name	Duty Day Name	Covers Post?	Holiday Lockdown?	Gender Types
✓	1	Slot 1	Post 1	Area 1			
✓	2	Slot 2	Post 2	Area 2			
✓	3	Slot 3	Post 3	Area 3			
✓	4	Slot 4	Post 4	Area 4			
✓	5	Slot 5	Post 5	Area 5			
	6	Slot 6	Post 6	Area 6			
	7	Slot 7	Post 7	Area 7			
	8	Slot 8	Post 8	Area 8			
	9	Slot 9	Post 9	Area 9			
	10	Slot 10	Post 10	Area 10			
	11	Slot 11	Post 11	Area 11			

D 5. Select OK to confirm

E 4. Enter value

3. Select as required

1. Select **Configure Slots**

2. Select the slot(s) that require configuration. Select one or more slots using the left-hand mouse button
3. Select the various values that you wish to update.

4. Enter the values as required. The **Area Name**, **Slot Name** and **Post Name** can be updated separately (depending upon how the user wishes to model their areas/slots/posts), for example, they may have 5 slots in the same **Area**, spread across two **Posts**, with different labels and settings for each **Slot**.

The user may wish to enter values for/enable the following cell options too. By default they are all disabled:

- **Duty Day Name** - Select the Duty Day Type from the selection available through the pop up dialog box
- **Covers Post?** - Select to display the **Covers Post?** flag
- **Holiday Lockdown?** - Select to display the **Holiday Lockdown?** flag
- **Gender Types** - Select the **Gender Type** for the slot from the selection available through the pop up dialog box. This ensures that only people of the selected gender are able to fill the slot

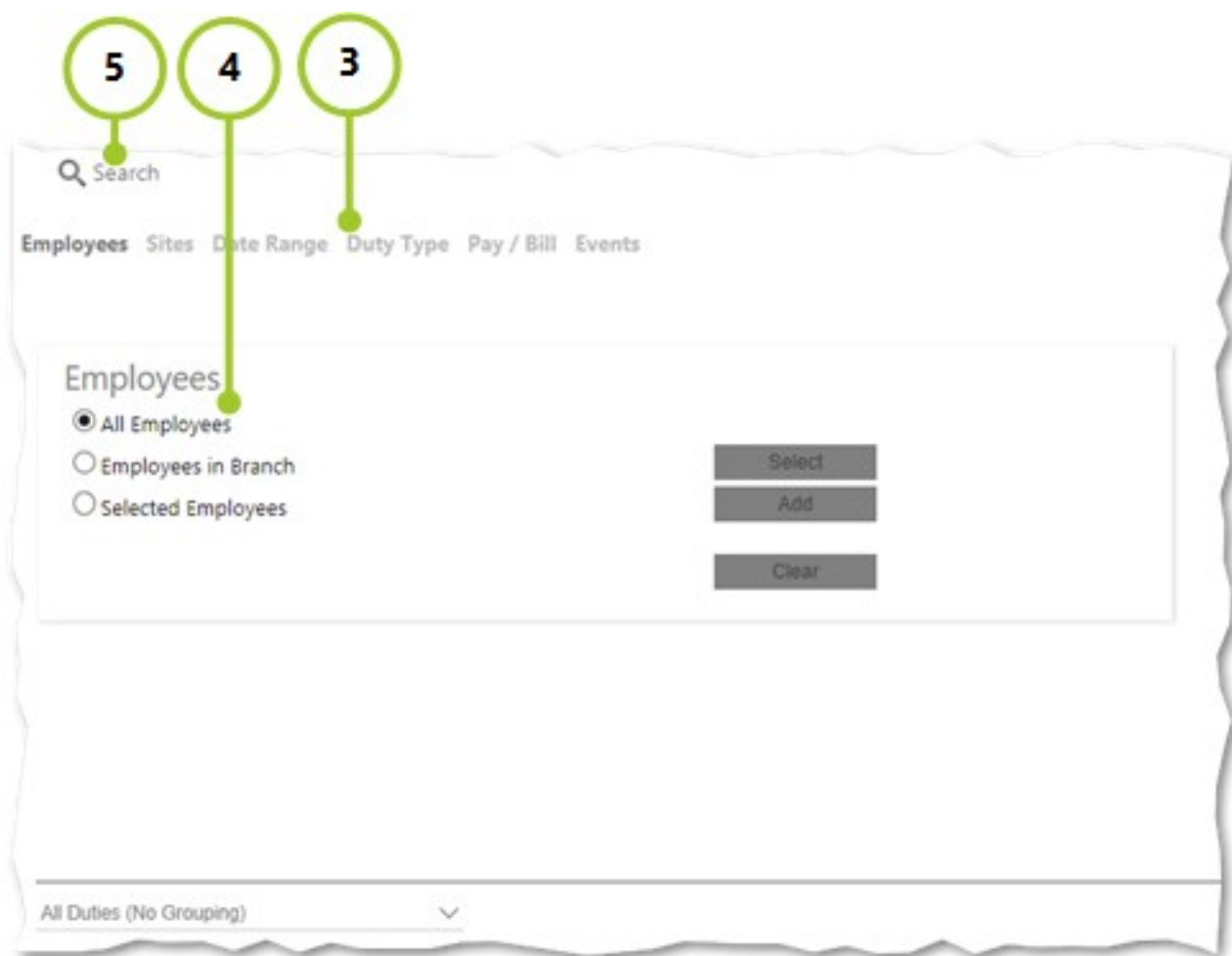
5. Select **OK** to update your changes. The user should repeat tasks 2 through 5 until the structure meets with their business need
6. Save the settings for the site by selecting **Save**

How can I schedule using the Duty Filter?

Searching and filtering using the duty filter

There are several different ways to search for/filter duties using the **Duty Filter Wizard** as shown below:

1. Open either the **Manage | Duties** or the **Plan | Duties** page (not shown)
2. Select **New Search** (not shown)
3. Select how you wish to search for duties, by opening the appropriate tab, Select either **Employees, Site, Date Range, Duty Types, Pay and Bill** or **Events**
4. Set up your filter using the various choices available
5. Select **Search**



Using the duty filter view

After a search has taken place, the duty filter view is displayed onscreen as shown below:

The screenshot shows the 'Duty Filter' view in the Timegate/TempaCMS interface. At the top, there is a toolbar with various icons for actions like 'New Search', 'Refresh', 'Duty Edit', 'Duty Delete', 'Duty Info', 'Swap Employees', 'Assign Employee', 'Suitable Employee', 'Diary Event Edit', 'Contact Details', 'Send Message', 'Approve', 'Un-Approve', 'Confirm & Duty', and 'Configure Grid'. Below the toolbar, there are summary statistics: Employees: All Employees; Sites: All Sites; Events: All Events; Total Duties: 10. There are also filters for 'Date Range' (27 Apr 2020 to 04 May 2020), 'Duty Types' (Ignore Duty Status), and 'Hour Types/Play Levels' (Ignore Hour Types and Play Levels). A 'Difference' filter is set to '00:00 Less Than'. The main area is a table with the following columns: Surname, First Name, Middle Name, Telephone PIN, Mobile Number, Employee Zone, Hour Type Code, Pay Level Code, Operational Start, Operational Finish, Actual Start, Actual Finish, CP/Hours, AC/Hours, Difference, Sel, Duty Status, Location, Duty Identity, Post Name, Post Area, Site Name, SIN, and Site Group Name. The table contains several rows of duty data, including columns for 'Hour Type Code', 'Pay Level Code', 'Operational Start', 'Operational Finish', 'Actual Start', 'Actual Finish', 'CP/Hours', 'AC/Hours', 'Difference', 'Sel', 'Duty Status', 'Location', 'Duty Identity', 'Post Name', 'Post Area', 'Site Name', 'SIN', and 'Site Group Name'.

From the duty filter view, you are able to select single or multiple employees and conduct the following scheduling tasks using the toolbar:

- Find out information about a duty
- Edit a duty
- Delete a duty
- Swap employees across duties
- Assign employees
- Find suitable employees
- Edit diary events
- Approve, un-approve and confirm duties

Configuring the duty filter view


The duty filter view can be customised based upon your individual wants and needs:

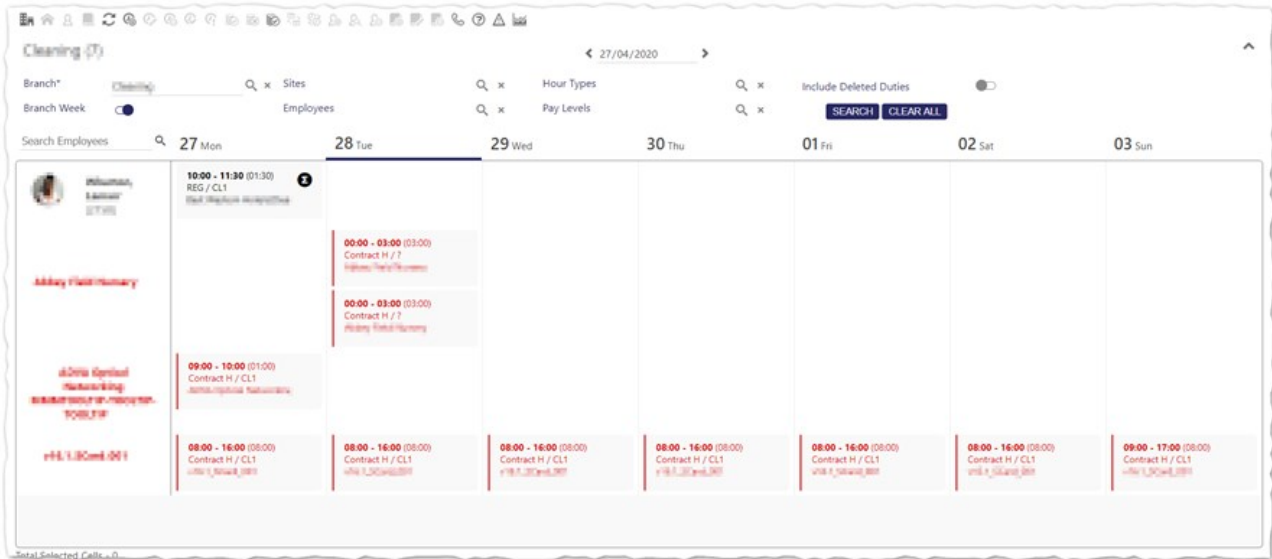
1. From the duty filter screen's toolbar, select **Configure Grid** (not shown)
2. From the **Configure Grid** dialog box that is displayed, select which columns you want visible (drag and drop the items between the **Visible Columns** and **Hidden Columns** areas on the screen)
3. Reorder the items in the way you wish to show them on the screen (drag and drop up and down in the **Visible Columns** area of the screen)
4. Select **Save** to update the view



How can I do scheduling in the Branch view?

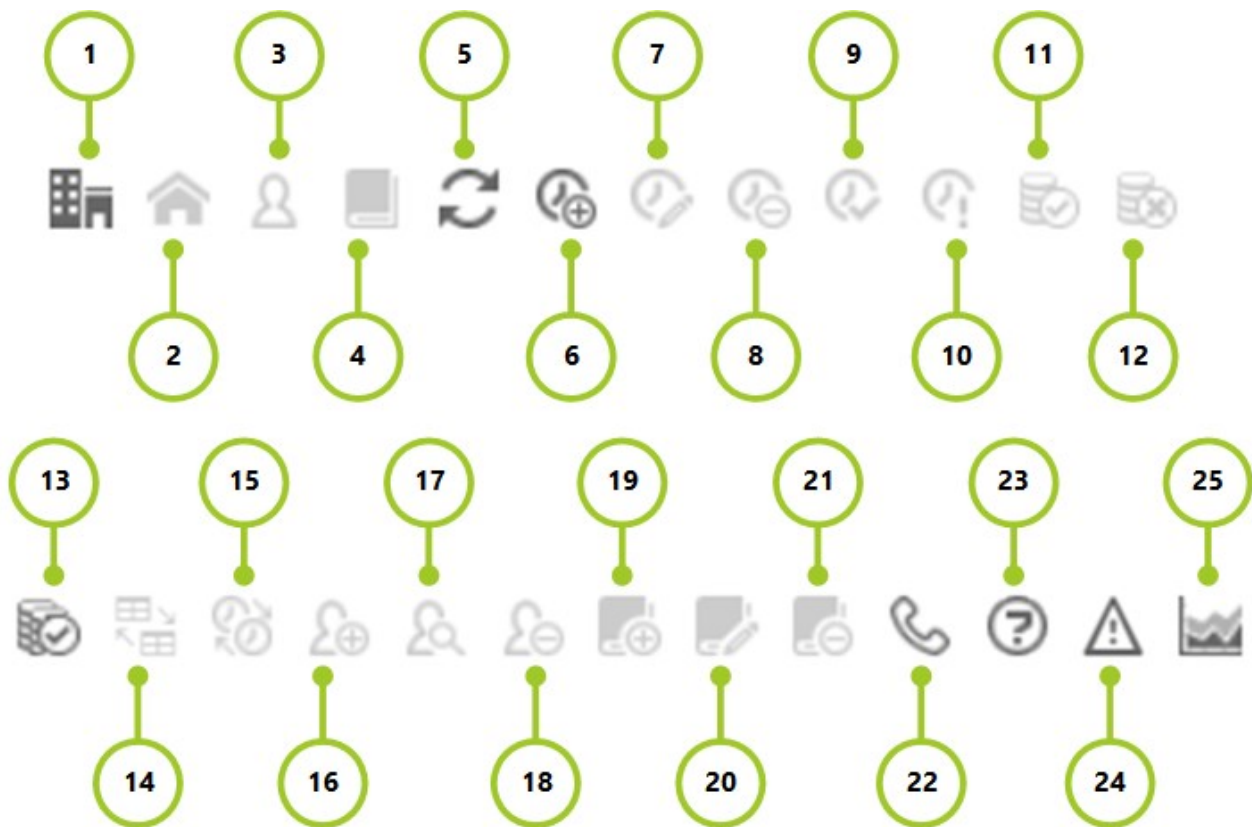
Branch view

Scheduling in the branch view is consistent with the other parts of Timegate. Select **Plan | Branches** from the main menu to open up the branch view. Now, select the branch/sites/employees/hour types/pay levels that you wish to view using the pop up dialog boxes accessed by selecting  (magnifying glass). Once selected, select **Search**. The Branch view will be shown:



Context sensitive quick access toolbar


The following are the various buttons on the context sensitive quick access toolbar - these will be explained in more detail to you as you work through this section of the guide:

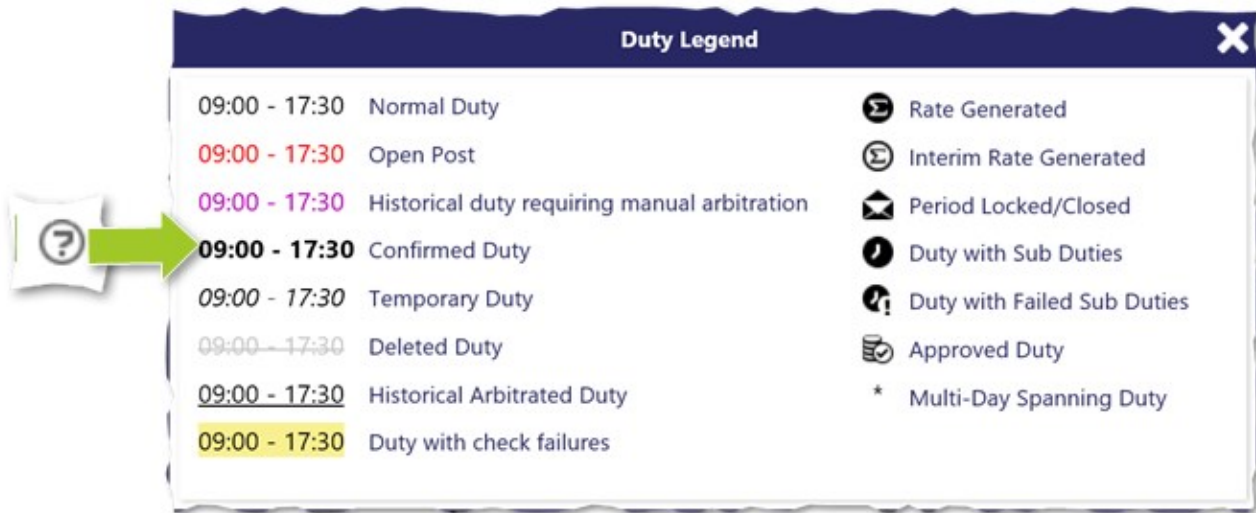


- | | | |
|--------------------|--|---------------------------|
| 1 Go to branch | 9 Confirm duty | 17 Find suitable employee |
| 2 Go to site | 10 Temporary duty (not available in Quick Start) | 18 Remove employee |
| 3 Employee details | 11 Approve duty | 19 Add diary entry |
| 4 Customer details | 12 Unapprove duty | 20 Edit diary event |

- | | | |
|-------------------|----------------------|-----------------------|
| 5 Site group | 13 Bulk duty approve | 21 Delete diary event |
| 6 Site | 14 Make contracted | 22 Contact details |
| 7 Refresh view | 15 Swap employees | 23 Legend |
| 8 Add duty wizard | 16 Assign employee | 24 Raise an incident |
| | | 25 Go to histogram |

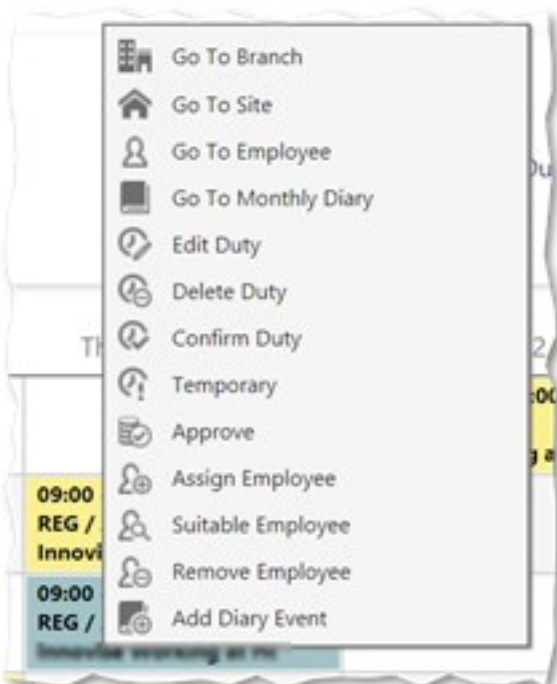
Legend

The following legend, accessed by selecting  from the quick access toolbar explains the schedule components:



Right-hand mouse click menu

When a duty/blank time slot is selected with the right-hand mouse button, within branch view a context sensitive duty menu is launched. This will vary based on the actions available for that duty/time slot. An example of such a menu is shown from where various scheduling functions are accessible:





Please Note: In some versions of Timegate the “Temporary” choice will not be provided in the menu

How do I add a Duty?

Opening the Duty Wizard

There are a variety of ways of adding a duty from the different scheduling screens. They are as follows:

- Select an empty post/slot and then select the **Add a Duty**
- Double click with the left-hand mouse button onto the empty post/slot
- Select an empty post/slot and then click with the right-hand mouse button, selecting **Add a duty**



Please Note: Not all methods of accessing the **Add a Duty Wizard** work on all screens

When the **Duty Wizard** is loaded, it opens the **Overview screen**.

Overview screen

In order to create a duty you need to complete the following details on this screen initially:

Flexible Duty

6

Back Create Duty Assign An Employee Remove Employee

Overview Premiums Info

Details

Customer	INN001-001	Innovise Customer
Site Group	INN-HO	Innovise Working at Home
Site Card	INN-HO	Innovise Working at Home
1 Slot From	Post 1 (Slot 1) <input type="text"/>	<input type="button" value="v"/>
2 No. of Slots	1 <input type="text"/>	<input type="button" value="v"/>
3 Flexible Shift?	<input checked="" type="checkbox"/>	
Default Times	Day 1 (07:00 to 19:00) <input type="text"/>	<input type="button" value="v"/>
From	19 Jun 2018 <input type="text"/> 07:00 <input type="text"/>	<input type="button" value="v"/>
Complete By	19 Jun 2018 <input type="text"/> 19:00 <input type="text"/> Duration 00:00 <input type="text"/>	
4 Unpaid Meal Break Duration	00:00 <input type="text"/>	
Unbilled Meal Break Duration	00:00 <input type="text"/>	
Hour Type	REG Regular Contracted <input type="text"/>	<input type="button" value="v"/>
5 Pay Level	ADM Administrator <input type="text"/>	<input type="button" value="v"/>
Employee	<input type="text"/>	
Send Auto Messages	<input checked="" type="checkbox"/>	

Regular Duty

Back Create Duty 7

Overview Premiums Qualification

Details

1 Customer	INN001-001
Branch	INN-HO
Site Group	INN-HO
Site card	INN-HO
2 No. of Slots	1 <input type="text"/>

Times

3 Flexible Shift?	<input type="checkbox"/>
4 Default Times	12 hour night <input type="text"/>
5 From	30/04/2019 00:00 <input type="text"/>
To	30/04/2019 08:00 <input type="text"/>
Duration	08:00 <input type="text"/>
Hour Type	<input type="text"/>
6 Pay Level	ADM <input type="text"/>
Unpaid Meal Break Duration	00:00 <input type="text"/>
Billed Meal Break Duration	00:00 <input type="text"/>
Unbilled Meal Break Duration	00:00 <input type="text"/>

Employee


Employee

Info

Booking ID	<input type="text"/>
Region	<input type="text"/>
Project	<input type="text"/>
Purchase Order	<input type="text"/>
Charge Code	<input type="text"/>

Event

Link Duty to Event	<input type="checkbox"/>
Event Name	<input type="text"/>
Event Notes	<input type="text"/>

1. Check that the details are correct, along with the **Slot/Slot From** and **No of Slots** - modify the slot details as necessary
2. If you wish for the shift to be flexible between two given times, select **Flexible Shift?** A Flexible Shift has a flexible start and finish time, but is allocated a number of hours within a given window of time for example a shift must be two hours long between 09:00 and 15:00 hours on 21 June 2018. When ticked, the **To** field is replaced with a **Completed By** field. See "Flexible shifts" below below for more information
3. Select either:
 - **Default Times** from the drop-down list
 - or complete the **From** and **To** or **Complete By** dates and times (depending upon whether flexible or not) along with the **Duration**
4. Select the **Hour Type** and **Pay Level** from the drop-down lists
5. Enter the **Unpaid Meal Break Duration** and **Unbilled Meal Break Duration** (in HH:MM format) as required
6. Select  to add an **Employee** or,
7. Select **Create Duty** if you do not wish to add an **Employee**, add **Premiums** or any further information to the screen. Select **Create Duty** to save the duty and return you to the previous scheduling screen

Flexible shifts

A flexible shift is one that can be added to the schedule or adhoc type scheduling. It is very useful where the employee only works a few hours within a contracted duty time. for example an employee works a two-hour shift at some point between 08:00 PM and 07:00 AM

Adding a flexible shift

When you create a flexible shift, the start and end dates you enter will indicate the overall time window in which the duty can be worked. In the example above, you would:

- Select **Flexible Shift?**
- Enter the **From** time of 20:00
- Enter the **Complete By** time of 07:00 (defining the overall window)
- Enter 02:00 for **Duration**

If a single cell in the site view is selected when **Duty Add** is selected, then **Slot** changes to **Slot From. No. of Slots** will appear underneath, containing a list of numbers from 1 to the maximum slots in the system. You can change this default from "1" to "10" (for example) and when **Create Duty** is selected, multiple duties will be created from the starting slot to the number of selected slots. Where a duty already exists in a slot, this is skipped and the duty is created in the next available slot.

Flexible shift processing

Ticking the **Flexible Shift** check box will result in several things will happening:

- The **To** label will change to **Complete By**
- A new label (**Duration**) and **Time selection** will appear to the right of the **Complete By** date/time fields.

When a normal (i.e. non-flexible shift is created), this duration field will show the calculated duration based on the start and finish times and will not be editable.

New Processing Warning

Currently, when creating a manual duty, it will be created in the slot that you selected. If the week is then subsequently Rotaloaded, the manual duty will be moved to the right to make room for the contracted duty. The slot heading is also changed to say Conflicting Duty.


If a slot is due to hold a contracted duty, a new piece of text is displayed (Contracted Duty) next to the Post name in the drop-down list. You then have the choice of still using that slot, or selecting the next available one that will not hold a contracted duty.

If the user chooses a **Number of Slots** other than 1, when **Save** is selected, two checks are performed:

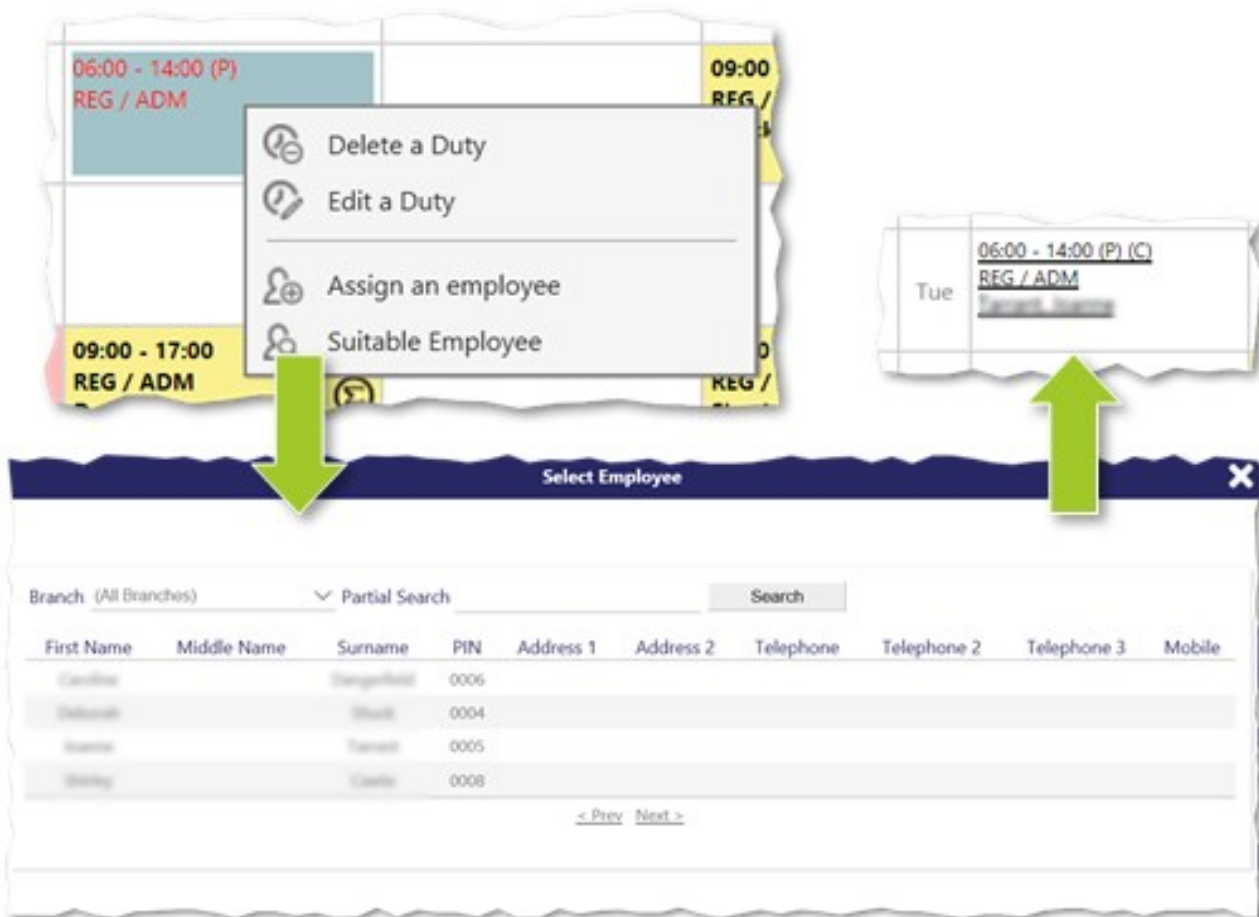
If a duty is already occupying a slot, then the processing will move over this slot and create the duty in the next available slot

If a slot is marked as a contracted duty slot, the processing will move over this slot.

How do I add an Employee to a Duty?

An employee can be added to a duty when you create it (by selecting the **employee** ). Alternatively, they may be added at a later date, via one of the scheduling screens:

- Select a duty, then select **Assign an employee** from the tool bar
- Right click to select a duty, then select **Assign an employee**



Can I add an Employee to multiple Duties at one time?

Yes. If you wish to assign a single employee to multiple duties (across different days - not on the same day):

- Either select the duties or select the empty posts/slots where you want to create the duties
- Check the duty details /enter the new duty details

- Select **Single Assign** - note how the word **Employees** changes to **Employee** as shown:

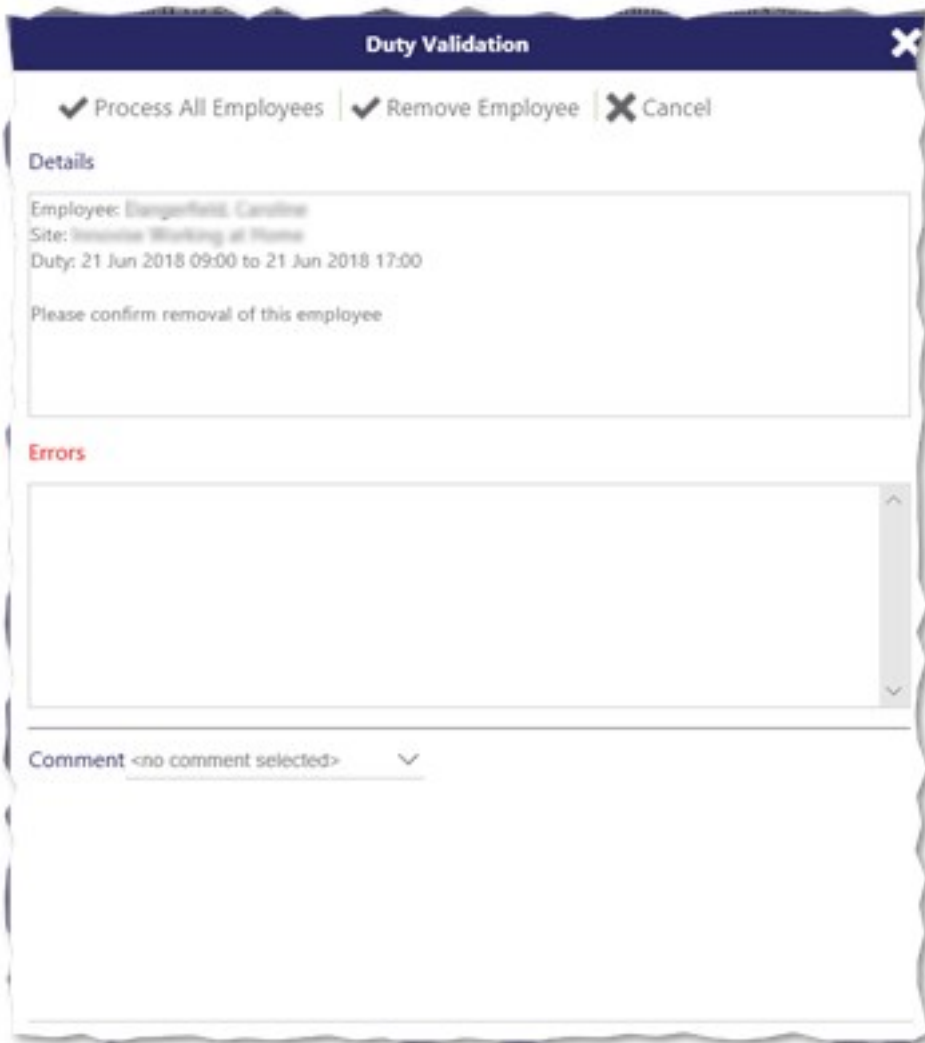


- Select an **Employee** from the pop-up displayed when pressing the magnifying glass
- Select **Save/Create Duty**

How are Employee(s) removed from Duties?

If an employee has been assigned to the duty and you would like to remove them:

- Select the **Duty**
- Select **Remove Employee**
- When the duty validation pop up is displayed as below, add a **Comment** to add to the audit trail and select **Process All Employees**



How can I delete a Duty?

There are two ways to delete a duty:

- Select the duty to be deleted. Select **Delete Duty** in the toolbar. A validation screen will load. Enter any comments then select **Delete Duty**
- Select the duty to be deleted. Right-click the duty. Select **Delete Duty**. A validation screen will load. Enter any comments then select **Delete Duty**

Once the duty is deleted, it will be shown as greyed out with a line through it. This shows that there was a duty added to the contracted/scheduled hours but it has been removed.

How can I reinstate a Duty?

In order to reinstate a deleted duty (shown as greyed out with a line through it):

- Select the duty to be deleted
- Right-click the duty
- Select **Reinstate a Duty**. A validation screen will load
- Enter any comments
- Select **Reinstate Duty**

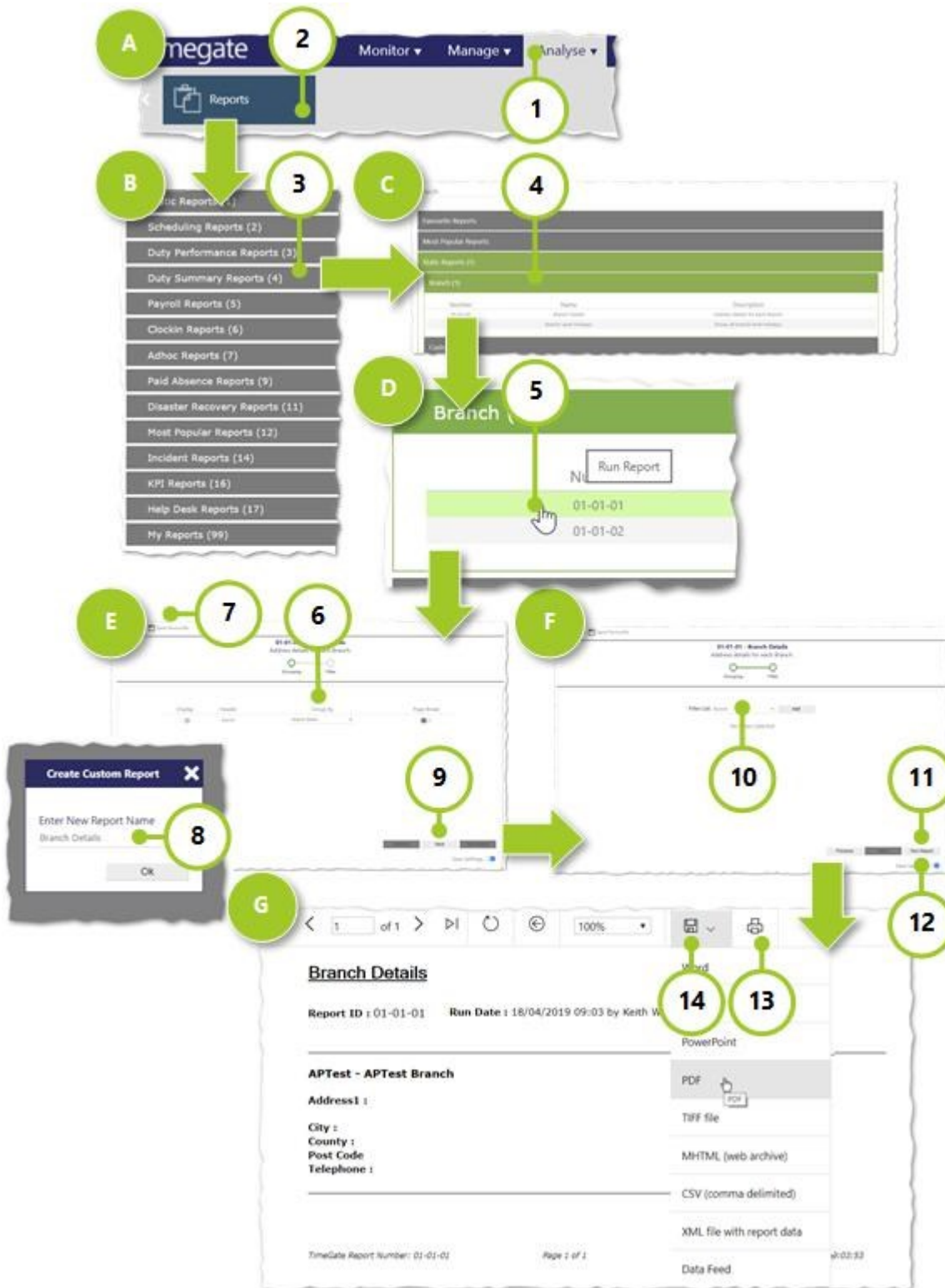
How are Open Posts filled?

Open posts can be filled in one of three ways:

- Manually using the assign an employee screen, which enables the user to allocate an individual to a duty. This can be accessed by:
 - Selecting **Assign an Employee** from the **Plan | Sites** page for a given Site. Select/create a duty. If the post has been created as Open (shown in red), right click on it and select Assign an employee. Assign the employee from the new dialog box. When the duty is saved, the system will validate the employee to ensure they match with the duty requirements. You can also select **Assign an Employee** from the toolbar.
 - Or by visiting the **Set Up | Sites | Contract Times** page. From here, select the **Employee** field. When selected, a new dialog box will appear. Select the employee from the list. When the duty is saved, the system will validate the employee to ensure they match with the duty requirements.
- Manually using the **Suitable Employee** option - see How can I do a search for employees that are available (suitable employees)?
- Automatically when rotalloading takes place - there's a setting, which when selected will automatically **Allocate Employees** to both Contracted and UFN Duties.

REPORTS (P14)

How do I access and run reports?



Step A

1. Select **Analyse** from Menu Ribbon
2. Select **Reports** from the Sub menu

Step B

You will then be presented with a search box and a list of report types. A full listing of all reports and their descriptions can be viewed in the Comprehensive Guide:

3. Select a **Report Type**

Step C

You will then be presented with a list of report types:

4. Select the report **Sub-Report Type**

Step D

You will then be presented with a list of reports:

5. Select the **Report** that you wish to run

Step E

At this point, what you see on screen will vary depending upon the report you have selected. Each report has its own wizard. In the example above, we are using the **Branch Details (01-01-01) report**. You can **customise report settings** and then either **save report settings**, **view** or **print** your report:

6. Select how you want the report to be displayed
 - Select **Display** to show on the report
 - Enter a **header name**
 - Select how you would like the report to be **grouped**
 - Select if you would like a **page break**
7. Select **Save Favourite** to save a version of the report that you have customised.
8. From the **Create Custom Report**, give the report a **Name**, then select **OK**
9. Select **Next** to move onto the next step of options

Step F

In this example, **Step F** is the second page of the wizard. Many of the reports have wizards that comprise more than a couple of pages long. You will then be presented with a list of **report types**:

10. Select how you would like to **Filter** the list as appropriate (Please be aware that filtering is restricted to a maximum of 25 fields)
11. **Run Report** to run the report (prior to printing it)
12. Select **Save Settings** to save the report settings in Timegate

Step G

View your report on screen in a browser:

13. Select the printer options and follow the instructions about how to print your report
14. Alternatively you can select **Save** to keep a copy of your report. This produces a menu that provides you with a cost of ways to export your documents

EMPLOYEE SET UP (P7)

How do I set up an Employee on the system?

Setting up an employee involves focusing on three tabs with an employee's record: a **General** tab, **HR** tab and **Pay Details** tab. Depending upon how your Timegate system has been configured, this option may not be available to you when you are using the Timegate/TemplaCMS interface. We will look at each tab in turn.

General tab

Select **Set Up | Employee** to open the page:

The screenshot shows the 'General' tab of the employee setup form. At the top, there are 'Save' and 'Add Picture' buttons. The form is organized into several sections:

- Home Branch:** Branch * (Innovise), Area (Deployment).
- Name:** Surname * (Thwaites), First Name (Adrian), Middle Name, Known as Surname (Thwaites), Known as First name (Ade).
- Address:** Address (12 Soho Street), City (Manchester), County (Cheshire), Post Code (M7 1AB).
- Next Of Kin:** Next of kin (Cynthia Thwaites), Emergency Contact (07701 123456).
- Contact Details:** Email Address (ade@icloud.com), Telephone, Telephone, Telephone, Mobile Telephone (07702 212121), Communication Method (Telephone Mobile).
- General:** PIN (0001), Date Of Birth (10/01/1960), Date Joined * (04/04/2018), Gender (Male), N.I. Number (NZ123456C), Full/Part Time (Full Time). Buttons for 'Next PIN' and 'Hist.' are visible.

The **General** tab will load. Follow the steps below to set up an employee:

- Complete the employees Home Branch Details. **Branch** is a mandatory field - you must select it from the dialog box that is loaded after selecting [...]
- Next, complete their **Name** and **Address** details
- If you wish to add their photograph to the record
 - Select **Add Picture**
 - Select **Browse...**
 - Find the picture you wish to add and select **Upload**
- Now, complete their **Next of Kin** and **Contact Details**

- Finally, complete the **General** section of the page, paying particular attention to the **PIN** and **Date Joined**. The PIN can be automatically generated by selecting **Next PIN**. If you are using the Timegate/TemplaCMS interface, ensure that the **PIN** aligns to the TemplaCMS **Payroll number** for the employee. The **Date Joined** is the date that the employee joined the organisation
- Select **Save** (Once you have saved the details in the **General** tab, several more tabs will appear on the page)

HR tab

Select the **HR** tab. The following will be displayed:

The screenshot shows the HR Information and Employment Dates sections of the Timegate/TemplaCMS interface. The HR Information section includes fields for Consent Given (checked, 31 Jul 2008 00:00), Nationality, Ethnic Origin, Religion, Sexual Orientation, Marital Status, Dependants (0), Disability (unchecked), Start Type, and Driving Licence (Full). The Employment Dates section includes Date Joined (31/07/2008, 9 years 10 months), Cont. Service Date, Probation Period, Probation Period End, Probation Period Extension, Date Left, Reason For Leaving, Fixed Term Contract (unchecked), Fixed Term End Date, and Vetting. The Portal Settings section includes Active? (unchecked, Password NOT SET), Function Role, and Last Login. The Contract History section includes Contract Type, Hours, and Expiry Date.

Enter the HR Information your company wishes to retain, by either selecting values from drop-down lists or by manually entering them.

When doing this, you should be aware of the **Consent Given** check box that was introduced in Timegate 18.2 to help with GDPR compliance. By default, it is not selected i.e. consent hasn't been given. Fields that are deemed sensitive for the purposes of GDPR are disabled. If you wish to store "sensitive" information, you have to select the check box, enter the information and then detail where consent was given. This is stored in an audit trail. If it is selected and you wish to deselect it, all "sensitive" HR information will be irretrievably deleted.

Next, enter the Portal Settings. The **Active?** section refers to whether the individual has been set up to use the **Employee Portal**. Pick the **Active?** check box to activate the employee. Select **Not Set**. This will send an email to the user with password details within it.

In the **Employment dates**, use the pop up calendars to set key date.

If there is any **Contract history**, enter this too

Select **Save**

Pay Details tab

Select the **Pay Details** tab - the following will be displayed:

The screenshot displays the 'Pay Details' tab in the Timegate/TempaCMS interface. The interface includes a navigation menu at the top with options like Save, Delete Employee, Refresh, View Diary, View Branch, and View Tasks. Below the menu, there are several tabs: General, HR, Pay Details (selected), Ops, HR Tasks, Absence, Notes, Sites Trained/Banned, Qualifications, Premiums, Shift Pattern, User Fields, Document Library, and Right To Work. The main content area is divided into several sections: 1. Pay Details: Includes fields for Pay Level (with a dropdown), Pay Basic Rate Only? (No, 0.00, RATES, Uplift Min. Wage?), Salary Paid? (checkbox, 0.00), Pay Summer Time Hour? (checkbox), Pay Winter Time Hour? (checkbox), Notice Period (dropdown), Alternate Public Holiday Pay Multiplier (0), and Use Hourly Holiday Pay (checkbox). 2. T&S Eligibility: Includes T&S Post Code and T&S Eligibility (with a SETTINGS button). 3. Absence Settings: Includes Standard Daily Hours (0.00), Av. Daily Hours (0.00), Av. Hourly Rate (0.00), Never Auto-Calculate Averages? (checkbox), and Av. Daily Rate (0.00). 4. Bank Details: Includes Bank Name, Bank Account Name, Bank Sort Code, Bank Account Number, and BS Roll No. 5. Overtime Details: Includes Duty Overtime Profiles (with a dropdown), Period Overtime/Limit 1/2 (Not Applicable, 0.00, 0.00), and Public Holiday Overrides Overtime (checkbox). 6. Payroll Run Information: Includes Pay Code, Pay Period (1 Week, CHANGE), Payroll Run (dropdown), and External Reference ID.

- Enter the employee's **Pay Details**, **Absence Settings** and **Overtime Settings** (the other details are not used as part of Timegate essential solutions)
- Select **Save**

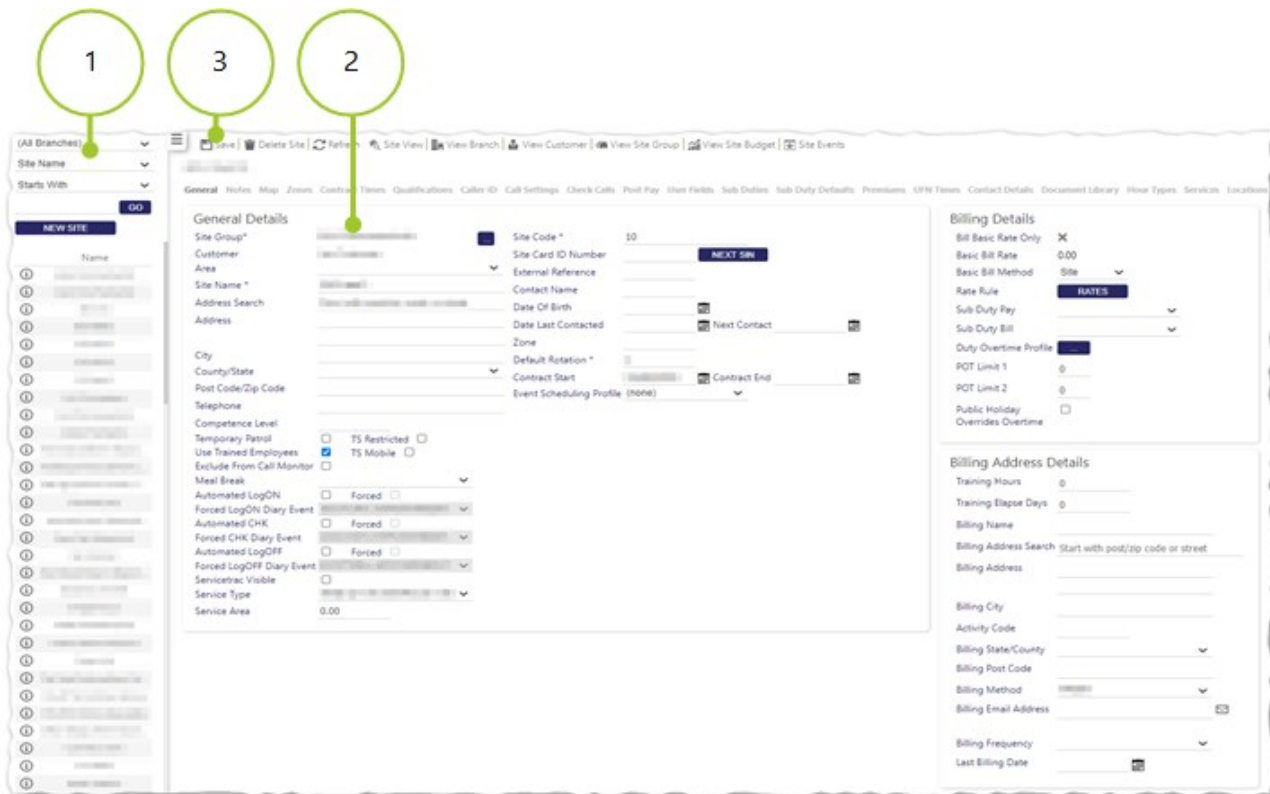
The following explanations should help you when completing the fields

- **Pay Level** - the default pay level that is used in the Duty Scheduling Checks to ensure that the correct level of employee is assigned to the Duty
- **Pay Period** - By default, this is weekly. This defines the period of time that pay is calculated over e.g. 1 week, 2 weeks, 4 weeks or Monthly)
- **Pay Summer Time?** - The clocks move forward 1 hour meaning that the employee will actually work 1 hour less than scheduled. Therefore, if not paying this extra hour, leave this setting clear
- **Pay Winter Time Hour?** - Indicates whether to pay the Winter Time Hour when an employee is on a duty overnight and the clocks change into Winter Time
- **Alternate Public Holiday Pay Multiplier** - By adding a value in this field, you are configuring the system to override the bank holiday pay rules assigned to the site. For example if the employee worked a bank holiday on a site that attracted a double pay rate and in the field you enter 1, the employee will only receive a single pay rate for all bank holidays. if the value was changed to 3 then the employee would be paid triple time etc. regardless of the rules on the site
- **Public Holiday Overrides Overtime** - This option enables your business to choose whether Timegate does or does not bill to the customer the public holiday rate or the overtime rate. By default, in Timegate if a duty spans a normal day, into a public holiday, the overtime rate takes preference when billing, instead of the holiday rate. This option enables this to be changed so that the public holiday rate takes preference over the overtime rate

SITE SET UP (P6)

How do I set up a site?

Select **Set Up | Sites** to open the page. Follow the steps below to set up a site:



1. Select **New Site**
2. Enter **General Details, Billing Details, and Billing Address Details**. Mandatory fields are shown with a *.
3. Select **Save** (Once your new Site is saved, there will be several more tabs in addition to **General**)

The following fields benefit from further explanation

- **Competence level** - the minimum competence level allowed to work on site from 1 (being the lowest) to 9 (being the highest). If left blank, an employee of any competence will be allowed to work on the site
- **Use Trained Employees** - Select if employee needs to be trained on the site to work on it
- **Exclude From Call Monitor** - Select to stop site being shown Call Monitor. Duty calls (ON, CHK and OFF) will be taken automatically
- **Meal Break** - Select a profile from the drop-down list box
- **Default Rotation** - The standard weeks in rotation that the site operates. Set this to 1 for all new sites
- **Automated Log ON** - Selecting sets up the system to automatically assume the employee has arrived for their duty. The **Forced** check box is used to set the system to automatically take the call at the end of the post window that has been set for the site. If you have selected the **Forced** option you can then select a diary event to add to the Employee record from the drop-down list box (**Forced LogON Diary Event**)
- **Automated CHK** - Selecting sets up the system to automatically assume the employee has called in their check calls. The **Forced** check box is to set the system to automatically take the call at the end of the post window that has been set for the site. If you have selected the **Forced** option you can then select a diary event to add to the Employee record from the drop-down list box (**Forced CHK Diary Event**)
- **Automated Log OFF** - Selecting sets the system to automatically assume the employee has left their duty. The **Forced** check box is to set the system to automatically take the call at the end of the post window

that has been set for the site. If you have selected the **Forced** option you can then select a diary event to add to the Employee record from the drop-down list box (**Forced LogOFF Diary Event**)

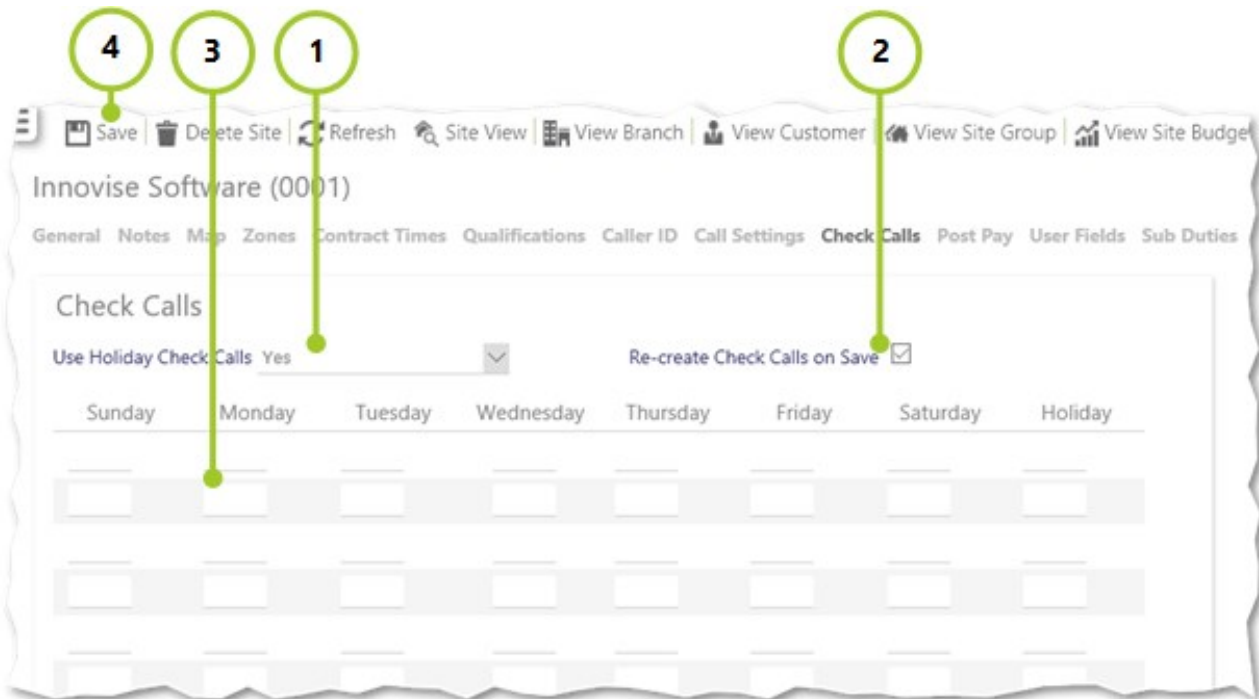
- **Service Type** - This is used to compare similarly sized or types of sites with others to identify why some are costing more to service for others. A drop-down list box contains the Service Types
- **Service Area** - This is the Service Area associated with the Service Type
- **Date of Birth** - date of birth of the site contact
- **Date Last Contacted** - this will be blank when setting up, but will in the future be set to the date that the contact at the Site was last contacted
- **Next Contact** - this is the date when the Site will be contacted next
- **Basic Bill Rate Only** - Set this if the billing rate for all duties carried out on the site are to be billed at the same rate, irrespective of the **Pay Level** assigned to them
- **Basic Bill Rate** - When the **Bill Basic Rate Only** is set, enter the bill rate here
- **Basic Bill Method** - Select a **Basic Bill Method**, either at **Site** or **System** level. If **Site** is selected, **Rate Rule** is shown along with a **Rates** button. If **System** is selected, **Rate Card Rule** is shown along with a [...] button
- **Rate Rule** - Select the rate along with the associated effective dates. One or more rules can be selected at a time
- **Rate Card Rule** - Select the rate card rule of choice from those provided.
- **Bill Basic Rate Only ?** - Select if you wish to bill a basic rate and enter a value for it
- **Contract Start/Contract End** - the date that the site contract becomes operational/ceases
- **Sub Duty Pay/Bill** - Select from drop-down list box how pay/billing should be managed for a Sub Duty
- **Duty Overtime Profile** -
- **POT Limit 1** - Number of hours that are worked in the Period before the Employee is paid at the **Period Overtime Overtime 1 Hours Type**. **POT Limit 1** along with **POT Limit 2** are both optional number fields that allow values of up to 999.99 to be entered. Validation is in place so that the **POT Limit** cannot have a greater value than the **POT Limit 2**
- **POT Limit 2** - Number of hours that are worked in the Period before the Employee is paid at the **Period Overtime Overtime 2 Hours Type**
- **Public Holiday Overrides Overtime** - The **Public Holiday Overrides Overtime** option enables your business to choose whether Timegate does or does not bill to the customer the public holiday rate or the overtime rate. By default, in Timegate if a duty spans a normal day, into a public holiday, the overtime rate takes preference when billing, instead of the holiday rate. This option enables this to be changed so that the public holiday rate takes preference over the overtime rate. By default this box is not unchecked. When checked, **Rate Generation** will bill holiday instead of overtime when a duty moves from overtime to holiday. When unchecked, **Rate Generation** will bill overtime instead of holiday when the check-box is checked, and the duty moves from overtime to holiday
- **Training Hours** - The number of hours that an employee must work before they are deemed to be trained on the site. The Duties that the employee will need to work must have an **Hours Type** that is set to be a **Training Hours Type Site**
- **Training Elapse Days** - The number of days that the employee over which the total **Training Hours** above should be worked. Once the employee has worked these hours, the site is automatically added to their **Sites Trained** Tab



(Please Note: Not all fields are available in all versions of Timegate/Quick Start. This feature may have been turned off if you are using for example, the Timegate/TemplaCMS interface.)

Where and how do I define the Site's Check Calls?

You can add check calls to a site from the Check Calls screen. This can be accessed from the **Set Up | Sites** page, under the **Check Calls** tab. You can set this up following the steps below:



1. Select whether to have check calls in holiday periods, by picking **Use Holiday Check Calls**
2. Select whether to create the calls when the screen view is saved by selecting **Re-create Check Calls on Save**
3. Add times of the check calls in HH:MM format
4. Select **Save**

How are Contacts and Escalation Groups added to a Site?

You can add **Contacts** and an escalation group to your site from the **Contact Details** tab. Simply enter the **Site Contact Details** (i.e. the main contact from your organisation on site) and/or the **Client Contact Details** in the spaces provided. Additionally, select **Escalation Group** for site related problems, using the drop down list. Once your details have been entered select **Save**.

USER SET UP (P3)

How do I create a Timegate User?

Users are created from within the FM Cloud. You will need the appropriate security rights in order to do this. If you need to create new users and do not have the ability to do so, please speak to your administrator who can grant you the correct level of system access.

Follow these steps in order to create a new user, from within the **FM Cloud**.

Select **User Management**:



You will now see the **FM Cloud User Management** screen:



Within this page, you will see a summary of the various system users, along with their access levels to one or more instances of Timegate databases. Depending upon your solution, you will see a number detailing how many Desktop licenses you can have. If you are a new Timegate Customer, you should ignore this field.

Select **Add User** to create your new user. The following screen is loaded:

The screenshot shows the 'Add New User' form in the 'The FM Cloud' interface. The form has a dark blue header with the logo and a user welcome message. The form fields are: Portal Role (dropdown menu with 'Cloud User' selected), Email, Secondary Email, First Name, Middle Initials, and Last Name. There are two checkboxes: 'Display Release Notes' and 'Display Training Videos', both of which are checked. A green 'Save' button is at the bottom right. Two callout boxes with green borders and lines pointing to the form: one points to the 'Portal Role' dropdown and is labeled '1. Enter user details'; the other points to the 'Save' button and is labeled '2. Select Save'.

1. **Add New User** - enter the following details:

- **Portal Role** - select either **Cloud User** or **Administrator**. A Cloud user will be able to log onto Timegate as a user using the Web Client. A User configured as a Cloud Admin will have access to the administrative functions of their company's Timegate system enabling them to manage instances and users.
- **Email** - a valid unique e-mail address is required. Without this, the user will not receive their password to access the system
- **Secondary Email** - this is a back up email address in case the other one doesn't work correctly
- **First Name, Middle Initials and Last Name** - self explanatory
- **Display Release Notes** - this controls whether the user sees a tile that enables them to access Release Notes. Select to display an FM Cloud tile for Release Notes
- **Display Training Videos** - this controls whether the user sees a tile that enables them to access Training Videos. Select to display an FM Cloud tile for Training Videos. Please be aware that these videos are for an older version of Timegate, so the interface may be slightly different. The basic concepts are the same. We are presently in the process of updating our videos for the Web Client

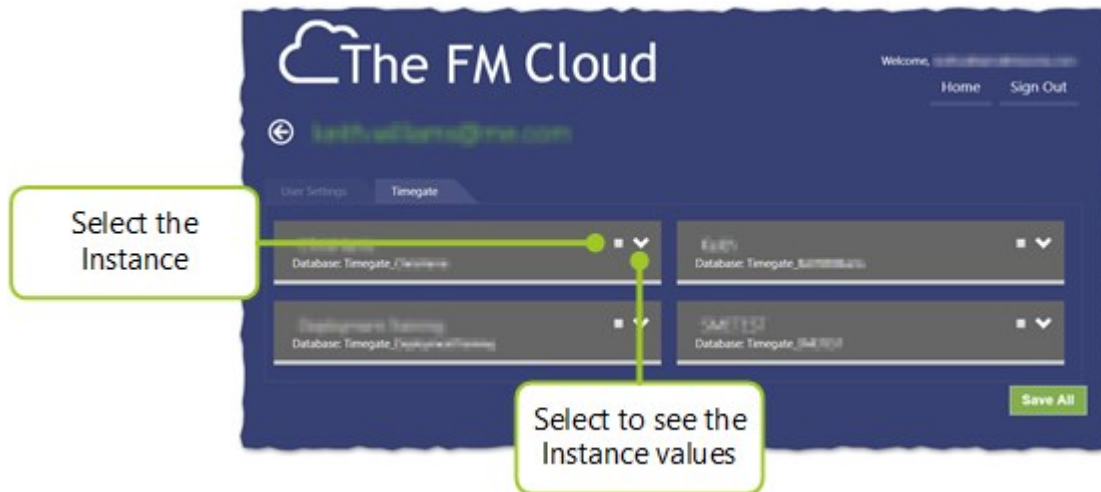
2. Select **Save**. You will be returned to the **User Management** screen. You will see the name of the user that you have created. They will not be assigned to any Timegate instances. The next step is to assign them to one or more of these - this is covered in "How do I assign Users to Timegate instances?" below

How do I assign Users to Timegate instances?

To change or configure a user's details from within the FM Cloud:

1. Select **User Management**
2. Select the name of the user that you wish to assign Timegate instances to. This will open the **User Settings**.

3. Select the Timegatab. The following screen will be displayed:



4. Select the Timegate instance(s) that you wish to give the user access to

5. Select the down arrow (as necessary) to show the Instance access details. The screen will expand as



shown:

6. Configure the users settings as required, selecting from the drop down lists:

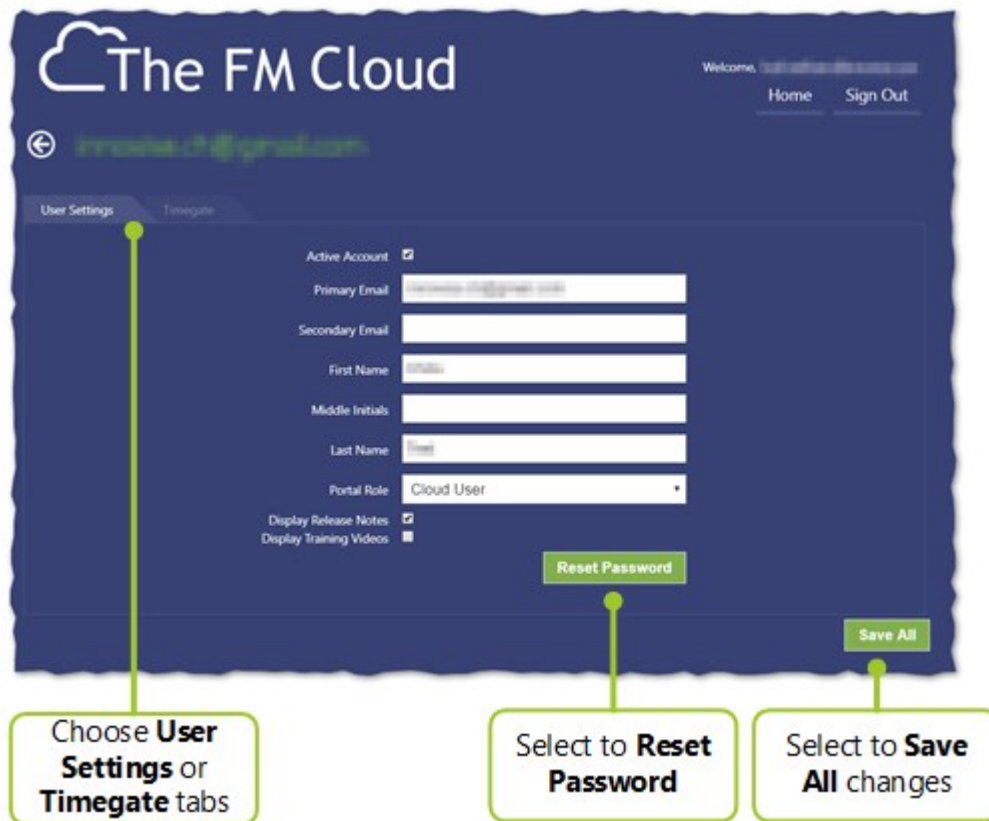
- **Security Type** - select **Standard** (the **Contract User** type is no longer valid and should not be selected)
- **Branch** - select which branch the user will have access to. You can only select one branch from this screen. Further branches and multiple function roles can be added from the Web Client's Admin Security menu. By default, you can only add one branch and one functional role
- **Function Role** - select the **Function Role** for the user
- **Site Role** - select the **Site Role** for the user, if this has been configured. These allow a lower level of security access i.e. at a **site**, rather than **branch** level

7. Select **Web Client** to give access to the Timegate instance. If you wish to provide the user with access to other Timegate instances, repeat Steps 4 through 7 until all instances are configured

8. Select **Save All**. A confirmation message will be shown, suggesting users may need to log out and back in for changes to take effect.

How do I change or configure a User's details (FM Cloud hosted systems)?

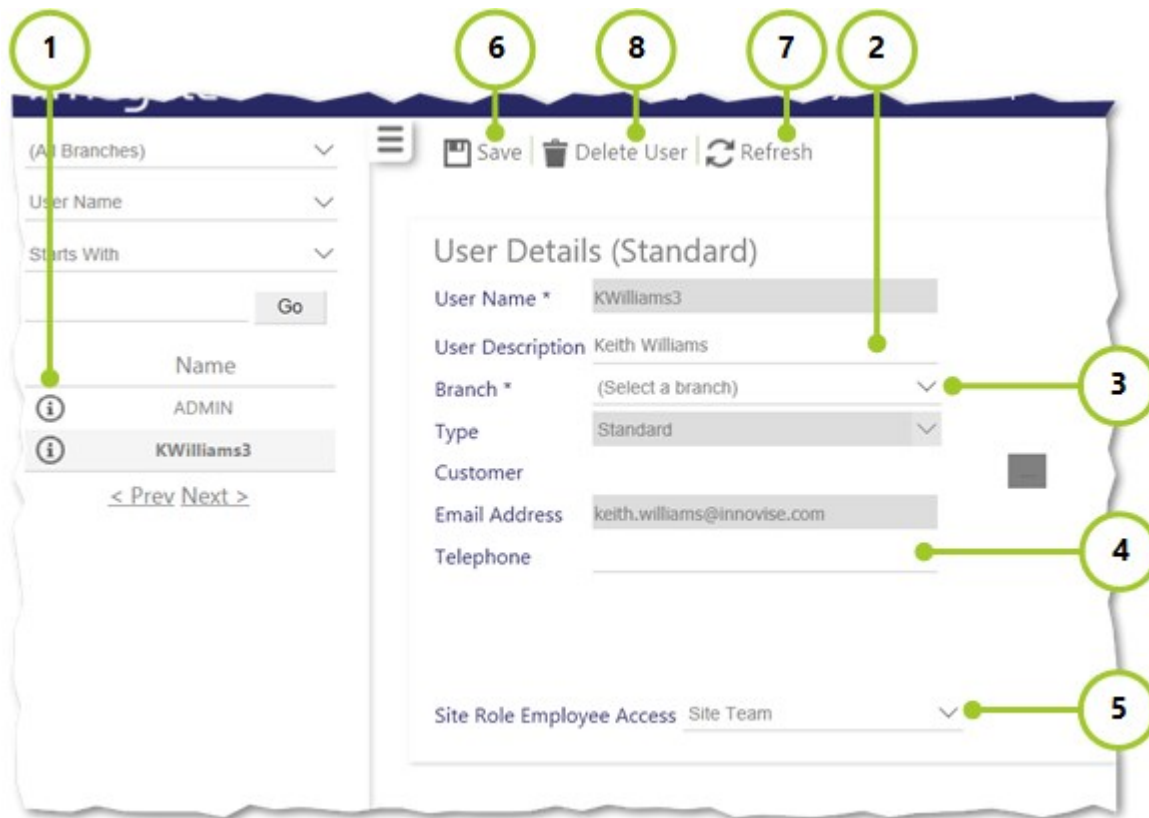
To change or configure a user's details from within the **FM Cloud**, select the **User Management** tile. Now select the name of the user whose details you wish to edit. This will open the **User Settings** page as shown:



1. Edit your setting. **Select:**
 - **User Settings** tab (where you can change user details, including whether to make their account active/inactive, or reset the user's password as shown)
 - **Timegate** tab (where you can configure Timegate instance access including **Branch**, **Function Role** and **Site Role**)
2. Select **Save All** to save any changes to either of the tabs. A confirmation message will be shown, suggesting users may need to log out and back in for changes to take effect.

How do I configure a User in Timegate?

Select **Set Up | Users** to open the **User** page. Follow the steps below to configure the **User**:



1. Select the User that you wish to configure by selecting the information icon next to their **Name**
2. Edit the **User Description** as appropriate
3. Allocate the User to the **Branch** from the drop-down list
4. Add a **Telephone** number as appropriate
5. Select the **Site Role Employee Access** from the two values in the drop-down list
 - **Site Team** - when a standard web user has a site role (or multiple site roles) assigned, then that user will only see employees, where they are in the site team table for any of the sites
 - **Branch** - when a standard web user has a site role (or multiple site roles) assigned, then that user will be able to see all employees belonging to the branches that are assigned to them, regardless of whether the employee is part of the site team or not
6. Select to **Save**
7. Select to **Delete User**
8. Select **Refresh** to revert last saved state



Please Note: once your user is set up, [you must add Function Roles](#) at a Branch level in order to see your branch

How do I allocate Function Roles?

Function Roles are allocated at either a **Branch** or **Site Role** level from the **Admin | Security | Role Allocation** screen:

- When **Function Roles** are allocated at a **Branch** level, a standard set of roles are provided in the system when it is purchased.
- When **Function Roles** are allocated at a **Site Roles** level, a standard set of roles are provided, but new ones can be created in **Admin | Security | Site Role** (take a look at "How are Site Roles created/added?" below to find out more)

Function Roles are allocated at a:

- **Branch** level from within **Admin | Security | Site Role | Role Allocation | Branches**
- **Site Roles** level from within **Admin | Security | Site Role | Role Allocation | Sites**

The layout of the screens are the same regardless of whether you are using the **Branches** or **Sites** page. An example screen is shown below:



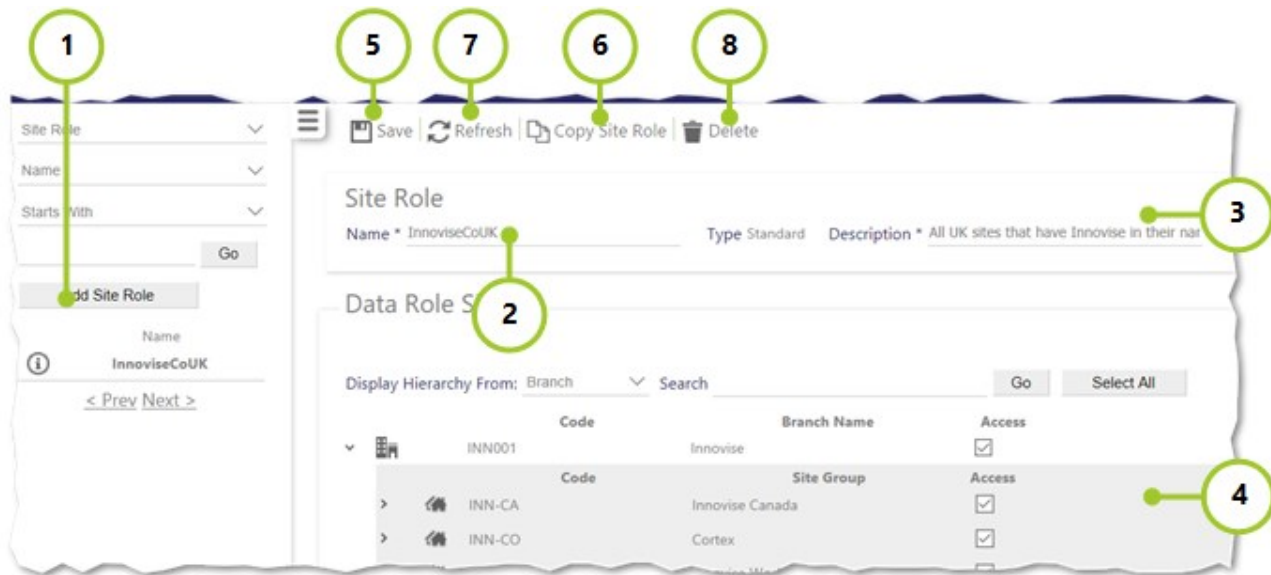
The following steps allow you to allocate/remove **Function Roles** for your **Users**:

1. Select **Name** of the **User** to allocate the function roles to, using the various search options
2. Select whether to allocate roles at a **Branches** or **Sites** level (if **Sites** is selected the view will change to reflect **Sites**, but the functionality remains the same)
3. Navigate to the **Branch/User/Site/Functional Role** you wish to modify (select to expand). If this is the first time that you are setting up a **User** and allocating them to a **Branch**, take a look at the various options on the right-hand side of the page
4. Select options from this box to allocate/remove using << (to allocate) and >> (to remove)
5. Select **Save**
6. Select **Refresh** to revert back to previously saved state

How are Site Roles created/added?

In the Timegate/TemplaCMS 2.1 interface, if you have configured the BA structure in TenplaCMS, the site roles will be automatically created for you. If you do not create the BA structure, you can manually create Site Roles as detailed below.

From **Admin | Security | Site Role**, follow the steps below:



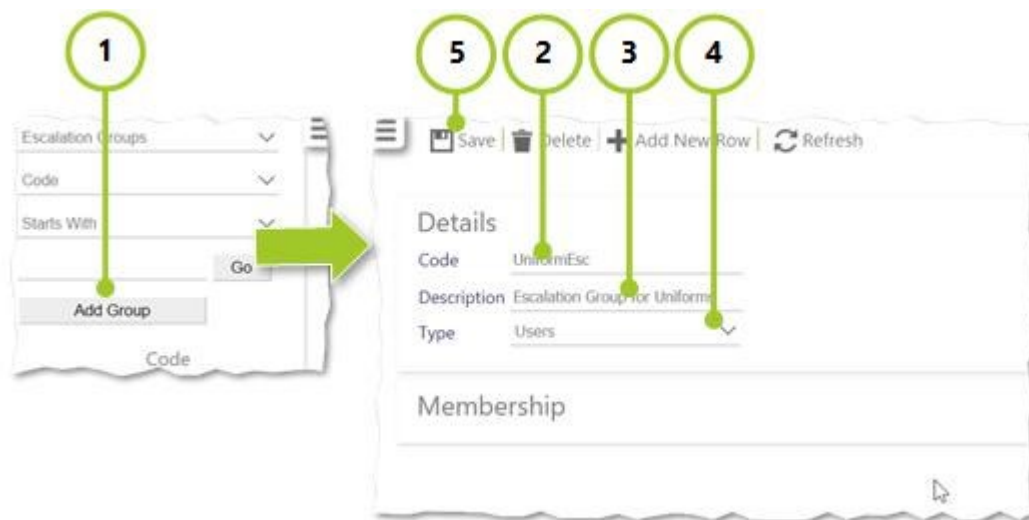
1. Select **Add Site Role**
2. Enter a **Name**
3. Enter a **Description**
4. Select the **Branches** and/or **Site Groups** and/or **Sites** that the role will have access to. Select > to scroll through these. Select the **Access** check box to enable access for the role
5. Select **Save**
6. If you wish to copy a site role:
 - Go to the role that is to be copied
 - Select **Copy Site Role**
 - Modify the settings (as per Steps 2 - 4 above) then Save (Step 5)
7. Select **Refresh** to revert to last saved state
8. Select **Delete** to remove a site role

ESCALATION GROUPS (P25)

What is an escalation group?

Escalation Groups are used to alert individuals (who are members of a group) when certain system events occur for example if calls in Call Monitor are overdue, members of an Escalation Group will be either emailed or will receive an SMS to let them know that there are tasks that need to be actioned. They can also be used to alert individuals of such things as uniform requests, holiday requests etc. within the Employee Portal or for duty related requests in the Customer Portal.

How do I set up an escalation group?



1. Open **Admin | General | Other Settings | Escalation Groups/Teams** and select **Add Group**
2. Enter unique identification **Code** (this will be shown in drop-down lists and in menus)
3. Add a **Description**
4. Select **Type** (each has different actions related to it in order to define the escalation group - see "What are the different types of escalation group?" below):
 - **Adhoc** (up to five group members, that are not restricted to Users or Employees)
 - **Users** (select pre-defined users to become members of the group)
 - **Employees** (select pre-defined employees to become members of the group)
5. Select **Save**
6. When prompted, select **OK** and log out

What are the different types of escalation group?

There are three types of escalation group: Adhoc, User and Employee.

Adhoc escalation group

Save | Delete | + Add New Row | Refresh

Details

Code: UniformEsc

Description: Escalation Group for Uniforms

Type: Adhoc

Membership

	Name	Phone Number	Email Address	Call	Email	SMS
1	Holly Lewis	07703121212	holly.lewis@lewis.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This escalation group is made up of those who are to be contacted by email address or telephone number. It negates the need to be either a Timegate user (with an ID) or an employee registered on a Timegate system.

To set up:

- Enter in the details of the person/people that you wish to set up as part of the escalation group. You are allowed a maximum of five
- Select method(s) of contact (**Call, Email and/or SMS**) along with entering contact details
- Select **Save**

User escalation group

Select User

Partial Search Search

Username	Description	Telephone	E-mail
ADMIN	System Administrator		
KWilliams1	Keith Williams		keith.williams@lewis.com

Save | Delete | + Add New Row | Refresh

Details

Code: UniformEsc

Description: Escalation Group for Uniforms

Type: Users

Membership

Name	Description	Phone Number	Email Address
ADMIN	System Administrator		

This escalation group comprises Timegate Users. To set up:

- Select **+Add New Row**
- Select the User of choice from pop up dialog box

- Repeat as needed to build up escalation group

Select **Save**

Employees escalation group

The screenshot shows a 'Select Employee' window with a table of employees and a details panel for the selected 'UniformEsc' group.

First Name	Middle Name	Surname	PIN	Address 1	Address 2	Tel
Caroline		Wright	0005			
Deborah		Wright	0004			
Joanne						
Keith						
Shirley						

Buttons: Save, Delete, + Add New Row, Refresh

Details

Code: UniformEsc
 Description: Escalation Group for Uniforms
 Type: Employees

Membership

Name	Phone Number	Email Address
Williams, Keith		keith.williams@innovise.com

This escalation group type comprises employees registered on a Timegate system. To set up:

- Select **+Add New Row**
- Select **Employee** from pop up dialog box
- Repeat as needed to build up escalation group

Select **Save**