

Roster Management

TEMPLACMS

Version: V.6.1.0



COMMERCIAL STATEMENT

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OVERVIEW

Background

The TemplaCMS timesheet is built around the process of confirming hours and preparing pay for a specific pay period. The timesheets can be generated as far in advance as desired and are continually updated to reflect changes in the underlying site contracts via a process known as ‘fix-up’.

As the timesheets are geared towards the pay cycle, they do not provide a rolling view of the planned/worked roster for a site, or indeed a multi-site roster that allows a manager to manage their workforce graphically across the sites for which they are responsible. This requirement is satisfied by the ‘Roster Manager’ facility available within TemplaCMS which allows the user to work with multiple clients, sites, business/marketing analyses for a date range that may well intersect dates for which timesheets already exist.

Changes made to the roster are recorded in an enhanced version of the existing ‘employee planner’, which is mainly used to plan future holiday and absences. Whilst changing an employee plan directly triggers a background ‘fix-up’ to apply the necessary effect on the timesheets, changes to multiple employee plans via the ‘Roster Manager’ is more dynamic and applies the changes immediately to all affected timesheets.

System set up

DEFAULT ABSENCE REASON

A ‘Default absence reason’ must be set via **System Admin > System Control > Payroll > Timesheets** to allow users to enter absence within the Roster Manager, this can then be overridden per day as required during the data entry process

COVER RATE METHOD

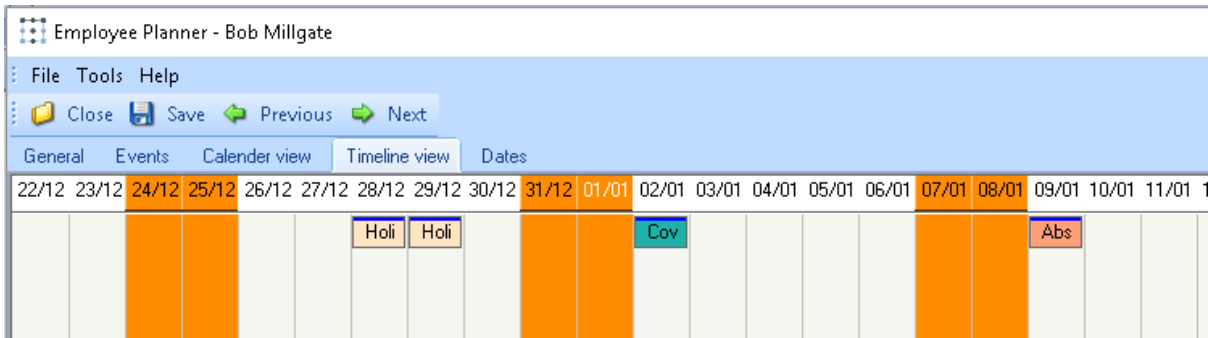
This defines the default cover rate which should be used where an employee cover’s multiple assignments from multiple other employee’s who have varying pay rates, each option is explained below:

1. Use lowest rate (for given day) – if an employee is set to cover multiple assignments with varying rates on the same day, TemplaCMS will assign the lowest rate that would have been paid for all of the cover hours
2. Use highest rate (for given day) – if an employee is set to cover multiple assignments with varying rates on the same day, TemplaCMS will assign the highest rate that would have been paid for all of the cover hours
3. Use cover defined on contract (for given day)/ use lowest rate– this will use the current rules defined in the background (above), but where a cover rate is not defined on either the employee assignment or contract TemplaCMS will use the lowest rate of cover as per method 1
4. Use cover defined on contract (for given day)/ use highest rate – this will use the current rules defined in the background (above), but where a cover rate is not defined on either the employee assignment or contract TemplaCMS will use the highest rate of cover as per method 2

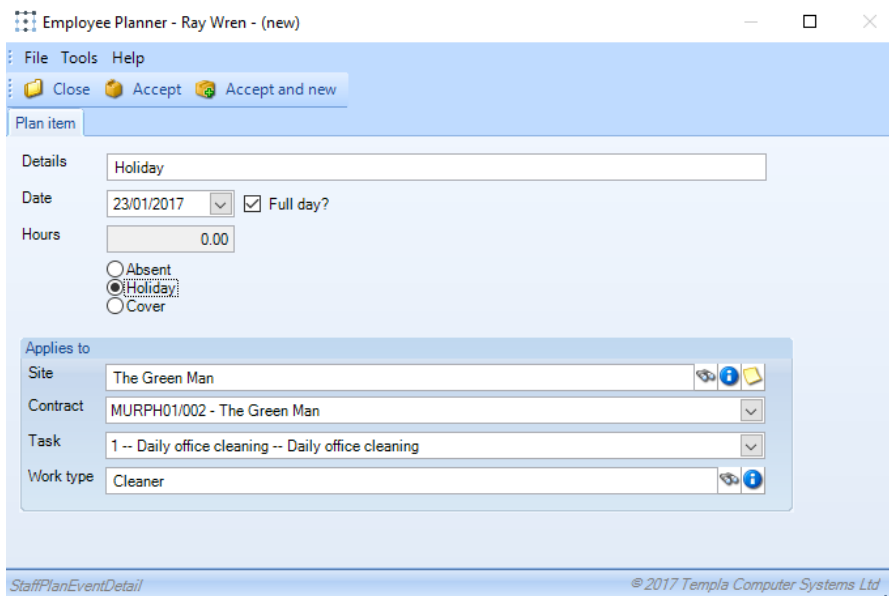
The screenshot shows the configuration page for Timesheets. The 'Roster manager cover rate method' dropdown is set to 'Use cover defined on contract-lowest rate (for given day)'. The 'Default absence reason' dropdown is set to 'Unauthorised'. Other settings include: Timesheet excel export style (Format1-Adjustments), Auto process leavers & joiners (No), Excess hours level (51.00%), Max hours per week (0.00), Leaver check days (128), Pro-rata rounding basis (End of quarter), Allowed periodic employees (Both), Periodic budget usage check (Both), Allow holiday on non-contracted date (Yes), Employee schedule format (Format 1 standard), and various checkboxes for auto-approve and un-tick options.

Employee planner

The employee planner provides an employee level scrolling timeline onto which planned holidays and absences can be plotted. Whilst it is possible to manually update the employee plan, it is really intended that this is maintained using the 'Roster Manager' function, described later in this document.



The employee planner allows the forward planning of cover, as well as more specific contract/task level planning. Thus, each entry on the plan allows the site, contract, task and work type to be specified.



Note that when adding 'full day' holiday or absence, the site/contract/task/work type to which this applies need not be specified. If un-specified, saving the plan will automatically generate entries for each of the employees assignments on the relevant date. Any entry where a number of hours are specified, requires that the site/contract/task/work type be nominated – thus 'cover' always requires these details, as you cannot have 'full day' cover.

Timesheet Generation and fix-up

Initial timesheet generation and subsequent fix-up is handled by the same process.

The employee planner affects employees on timesheets that already exist (to mark them as absent or on holiday). With the ability to plan cover, it is also possible that employees may be added to timesheets (as single period joiners). Furthermore, where an employee is planned as cover but is from a different pay run to the contracted employees of the site (i.e. multi-frequency timesheets), this may even result in the creation of an entire timesheet.

ROSTER MANAGER

Access

The Roster Manager function can be accessed from:

- Navigator
- Client toolbar
- Site toolbar
- Contract toolbar

When accessed from any of the toolbars the relevant record will be pre-selected.

Selection

On opening the Roster Manager will initially show the filter criteria:

Business analysis		Marketing analysis	
Company/Division		Customer Type	
Ops/Regional Manager			
BA			
Site Supervisors			

As with many areas of TemplaCMS, it is possible to create and publish multiple pre-defined filters to enable rapid switching between commonly used criteria.

Clients - this is a multi-coded selector field for employees to allow one or more clients to be selected.

Sites - is a multi-coded selector field for employees to allow one or more sites to be selected

Employees - this is a multi-coded selector field for employees to allow one or more employees to be selected. Note that by selecting an employee, a set of sites where the employees are rostered will be displayed. As such, filtering to an employee will retrieve all sites the employee is contracted to or covering, within the selected date range, and then also retrieve **all** employees for these sites.

From – enter the required date range.

All dates are relative? – when ticked the date range (specified above) relative to today's date will be used.

Show employee tasks only? - when ticked, the Roster Manager filtering process will return only contract tasks to which the defined employee(s) are assigned, either temporarily or permanently. As such, any other contract/tasks associated to a site to which the employee's timesheet relates will be excluded from the Roster Manager display.

For example: Site 1 has two contract/tasks – A & B

If the Roster Manager is filtered to employee John Smith who is only assigned to contract/task B, only contract/task B would be displayed, i.e. not contract/task A

In addition, the site level hours totals will only sum the hours for the subset of contract/tasks being displayed.

For example: in the above scenario the site level hours would be the total of hours on contract/task B only, not the total of contract/tasks A and B.

Roster

On acceptance of the criteria, the user will progress to the roster view. The roster is built using the criteria specified. Based on the date range and the existence of pay batches, this combines details from timesheets with those from live contracts, and the employee planner.

The resulting roster is presented with:

- three columns on the left highlighting ...
- site/task/employee details
- wizard column
- Timeline, i.e. days across matching the dates selected

The screenshot shows the Roster Manager interface. At the top is a toolbar with various icons for actions like Close, Refresh, Change filter, Select filter, Save changes, All, Exceptions only, Cover only, Holiday only, Absent only, Hours, Times, Check time conflicts, and Employee view. Below the toolbar is a table with columns for days of the week (Wed 19:00, Thu 19:00, Fri 20:00, Sat 21:00, Sun 22:00, Mon 23:00, Tue 24:00, Wed 25:00, Thu 26:00, Fri 27:00, Sat 28). The table contains rows for different tasks: 'AAMA01 - AAMA 8th - W/H 01A', 'AAMA01 : 1 - Daily office cleaning', '007102 - Domfeh, Sharjan : Clean', and 'AAMA01 : 2 - Washroom Services'. The 'AAMA01 : 1 - Daily office cleaning' row is highlighted in green, and the '007102 - Domfeh, Sharjan : Clean' row is highlighted in blue. A red box highlights the entire table area.

The screenshot shows the Event and Employees panels. The Event panel has fields for Net, Contracted, Cover, Holiday, and Absent, each with a value of 0.00. There are also Working times fields with a range of 00:00 to 00:00. The Employees panel shows a list of employees with columns for Payroll number, Name, and Post code. The employees listed are Smith Paul (Payroll number **1, Post code Tr33ght), Ggfgt Kenhgg (Payroll number **2, Post code Rrre), and Luis, LUCIA (Payroll number 000111, Post code E9 5PH). There are also icons for Absent (A), Cover (C), Holiday (H), and Del (Del) next to the employee names.

CONFLICT COLUMN

Conflict checking can be done either for a specific employee (using the appropriate icon to the left of the required employee) or for the Roster Manager as a whole - see section 2.11.

INFORMATION COLUMN

Using the 'i' icon next to a:

- 'Site' row will provide access directly to the site.
- 'Contract Task' row will provide access directly to the contract associated with the task.
- 'Employee' row will provide access directly to the employee record.

ERASE AMENDMENTS COLUMN

If amendments have been made to the roster, i.e. to mark absence, holiday or cover, then a rubber icon will appear in this column; clicking on it will remove all amendments - see screenshot in sections 2.3 (above) and 2.8 (below where amendment can be seen)

SITE / CONTRACT TASK / EMPLOYEE COLUMN

Non-contracted (i.e. joiner) employees are shown with a green background.

WIZARD COLUMN

Where an employee is dragged from the list of employees (bottom-right) or from elsewhere on the Roster Manager, and dropped on to a 'Wizard' cell, the employee will be added at the relevant level and cover auto-assigned to that employee to fill all the gaps for the roster date range for the site, task, or employee on which it was dropped. This therefore provides a one step process to identify an employee as covering for another employee (or for all the employees on a site or task) for the entirety of their holiday/absence.

TIMELINE COLUMNS - HIGHLIGHTING & PINS

On the site and task level rows, each cell shows the net hours rostered as green where the hours match the contracted hours. Where they do not match, this is shown in red, with the number of hours over or under identified but with a yellow down-arrow icon if under or a red up-arrow icon if over the contracted hours.

On the employee rows, cells show net hours, with 'pin' icons indicating the type of adjustments that exist, namely:

- **Green** pin is cover hours, as shown on
 - Wed 3rd Jan for the second employee (thus making the day green overall whereas Thu 4th Jan has no cover for the absence)
 - Fri 5th Jan for first employee, where an extra 2 hours cover has been done on top of the contracted hours (thus negating the 2 hours missing on Thu 4th Jan)
- **Red** pin is absence, as shown below on Wed 3rd & Thu 4th January
- **Blue** pin is holiday, as shown below on Mon 8th to Fri 12th January (where no cover has yet been arranged to negate this holiday)

	Mon 01/Jan	Tue 02/Jan	Wed 03/Jan	Thu 04/Jan	Fri 05/Jan	Sat 06/Jan	Sun 07/Jan	Mon 08/Jan	Tue 09/Jan	Wed 10/Jan	Thu 11/Jan	Fri 12/Jan
Site row (green = ok, red = variance) →	2	2	2	0 (2)	4 (2)			0 (2)	0 (2)	0 (2)	0 (2)	0 (2)
Task row (green = ok, red = variance) →	2	2	2	0 (2)	4 (2)			0 (2)	0 (2)	0 (2)	0 (2)	0 (2)
Employee: absent 2 days, holiday 5 days →	2	2			4							
Employee: covering Wed 3 rd January →												

Event pane (bottom left)

GENERAL

Clicking on an employee cell will show the detail event pane (bottom left). Details can be changed directly in the event pane, or on the grid using the shortcut keys as detailed in the event pane.

The Event pane contains the following fields and options:

- Net: 0.00
- Contracted: 0.00
- Cover: 0.00
- Holiday: 0.00
- Absent: 0.00
- Working times: 00:00 to 00:00
- Shortcut keys:
 - A Absent
 - C Cover
 - H Holiday
 - De Clear
- Cancel button

Where the use of CH/CA (Cover-holiday, Cover-absense) timesheet adjustments types are enabled timesheet entry allows adjustments of CH/CA. Roster Manager does not allow direct entry of codes. However, it does provide single key shortcuts to allow a user to plan quickly (i.e. C for cover). As the user enters a C, the process automatically applies the shortfall in hours for the task/date just as it does when dragging employees to cover. Thus, it will calculate whether the C event is actually CA, CH or a split between the two.

A composite of CH and CA on a single date is regarded as a single 'Cover' event.

Tue 03/Jul - **8310 - Tester, Tina

Net 3.00 Working times 00:00 to 00:00
 Contracted 0.00 00:00 to 00:00

Holiday 0.00
 Absent 0.00

C-Absent 2.00
 C-Holiday 1.00

COVER RATES

As 'cover' is planned using the 'Roster Manager', the cover rate applicable to the date is determined based on the contract and the employees being covered, but can then be overridden by the user if required. Where it is required to pay cover at a different rate to the calculated one on numerous days, the ability to set this can be done in the following ways:

Roster Manager: Multi-cell (for bulk update)

A toolbar toggle for 'multi-call' is available, which when pressed will allow the user to select multiple cells at once (for a bulk update) by holding control (for multiple discrete cells), dragging or holding shift (for ranges of cells):

Roster Manager

General

Close Refresh Change filter Select filter Save changes Save All Exceptions Cover Holiday Absence Hours Times Check time conflicts Employee view Multi-cell

Roster manager

	Mon 18/Nov	Tue 19/Nov	Wed 20/Nov	Thu 21/Nov	Fri 22/Nov	Sat 23/Nov	Sun 24/Nov	Mon 25/Nov
TL94583 - TL94583	15	15	15	5 (5)	5 (5)			
TL94583/01 : 1 - COMPEQ - COM	15	15	15	5 (5)	5 (5)			
200018 - Buns, Kip : Cleaner.								
200019 - Iced Fingers, Kip : Clean	10	10	10	5	5			
200020 - Baps, Kip : Cleaner.	5	5	5					
200021 - Rolls, Kip : Cleaner.								

Event

3 cells

Cover rate 0

The number of cells selected that have cover will be shown on the right, with the ability to enter a single cover rate to be applied to all cover within the selected cells.

Roster Manager: Cover Carry Forward

When in single cell mode, a checkbox for *Carry forward cover rate?* is available:

Roster Manager

General

Close Refresh Change filter Select filter Save changes Save All Exceptions Cover Holiday Absence Hours Times Check time conflicts Employee view Multi-cell

Roster manager

	Mon 18/Nov	Tue 19/Nov	Wed 20/Nov	Thu 21/Nov	Fri 22/Nov	Sat 23/Nov	Sun 24/Nov	Mon 25/Nov
TL94583 - TL94583	15	15	15	5 (5)	5 (5)			
TL94583/01 : 1 - COMPEQ - COM	15	15	15	5 (5)	5 (5)			
200018 - Buns, Kip : Cleaner.								
200019 - Iced Fingers, Kip : Clean	10	10	10	5	5			
200020 - Baps, Kip : Cleaner.	5	5	5					
200021 - Rolls, Kip : Cleaner.								

Event

Mon 18/Nov - 200019 - Iced Fingers, Kip

Net 10.00
 Contracted 5.00

Holiday 0.00
 Absent 0.00

Cover rate £10.00 Cover 1
 C-Absent 5.00 New
 C-Holiday 0.00

Carry forward cover rate?

Working times 00:00 to 00:00
 00:00 to 00:00

Details

If ticked then adding further cover to later dates on this row will carry forward the cover rate from this event. This carry forward will continue until a cover event is deliberately un-ticked for carry forward.

Note that this checkbox setting is not saved with the cover event (it is purely designed to make entry of cover events easier). As such a change in the filter applied to the Roster Manger will cease to perform carry forward.

Employee pane (bottom right)

A list of all available (authorised) employees are shown in the employee’s pane (bottom right):

Payroll number	Name	Post code
**1	Smith Paul	Tn33ght
**2	Ggfgt Kenhgg	Rrre
000111	Luis, LUCIA	E9 5PH

The user may drag an employee from the list of employees (bottom-right) or from elsewhere on the Roster Manager, and drop them onto the roster at a specific point, the location of which will trigger the appropriate behaviour:

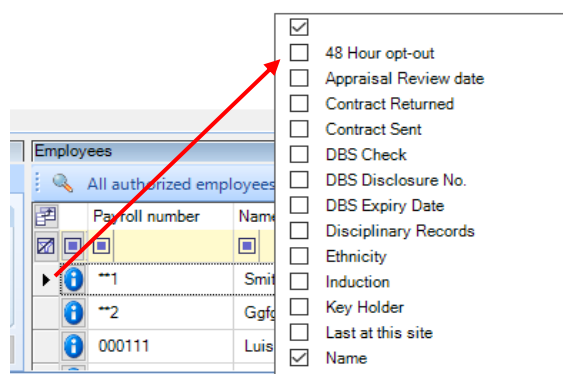
- *On a site* – the employee will be added (with no hours) to each task on the site where it does not currently exist
- *On a site cell* – as above, but if the cell is under rostered, cover will be plotted for the employee in order to fill that date’s gap. Note, if the employee already exists on the roster then the cover will be added to the existing employee
- *On a task or employee* – as per site processing, but at task level
- *On a task cell* – as per site cell processing, but at task level
- *On an employee cell* – as per task cell processing, but rather than filling the entire gap, cover will be added to replace missed (holiday or absent) hours for the cell on which the drop occurred
- *On an ‘auto fill wizard’ cell* – dropping on an auto fill cell will add the employee at the relevant levels (as above), but then apply cover to that employee to fill all the gaps for the roster date range for the site, task, or employee on which it was dropped. This therefore provides a one step process to identify an employee as covering for another employee for the entirety of their holiday/absence

On exit from the roster, any changes that the user has made will be saved to the employee planner, and if changes are made to periods for which timesheets exist, these will be automatically applied to the timesheets.

Note that if it is not possible to lock all the relevant timesheet to apply these changes, then it will not be possible to save the roster changes. An appropriate message is issued, and the lock must be removed in order to continue with the save.

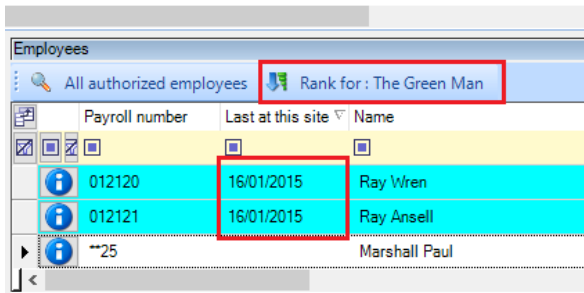
EMPLOYEE LIST PROPERTIES

The list of authorised employees shown at the bottom right of the Roster Manager can also display the employee ‘user defined properties’ to which the current user is authorised. These are not shown as standard but can be included via the ‘column chooser’ option, with any included columns being saved in the user’s preferences as only certain employees (e.g. those with a DBS check) might be suitable for covering other employees or sites:



EMPLOYEE LIST RANKING

When working on the roster for a given site and attempting to assign cover employees, it is possible to rank (prioritise) the list of available employees based on whether and when they last worked at the site. As the user moves around the Roster Manager grid the 'current site' is determined based on the cell of the grid selected. This 'current site' is identified in a button on the employee grid:



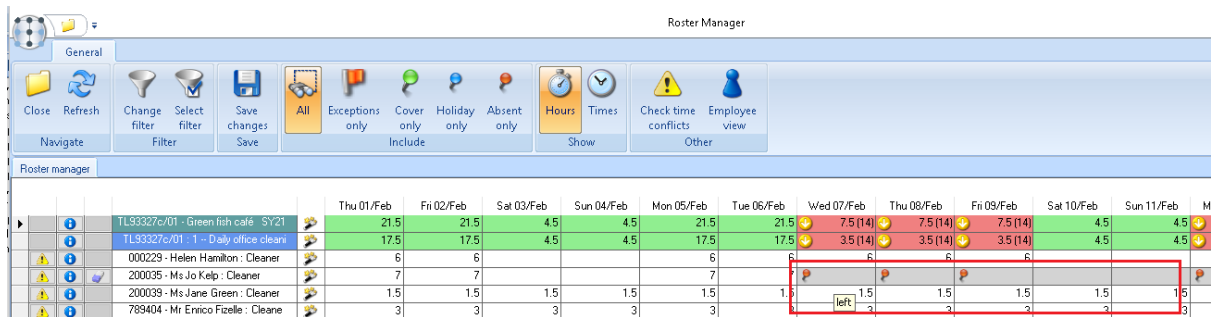
When pressed, this will determine the date that each employee worked at the current site, sorting the results in descending sequence, thus forcing those most recent workers to the top of the list. Furthermore, those that have worked at the current site will be highlighted.

Note that when working on multiple sites the ranking is not automatically performed (for performance reasons) but when working on a single site, it will be.

LEAVERS

Where an employee is marked as left site or left company (LS or LC) on a timesheet, this implicitly marks them as absent in the employee plan, and therefore on the Roster Manager. However, for forward planning, it is often necessary to see beyond the current period, where the employee could remain rostered until such time as the LS/LC was applied to the contract.

The Roster Manager detects where an employee is a pending leaver, and therefore extends the absence as far into the future as the user looks. Furthermore, these absence cells are blocked from amendment, with hover text identifying them as 'left':



Exceptions/Cover/Holiday/Absent Only

A number of 'toggle' buttons exist on the toolbar to allow the user to focus in on sites based on their state on the Roster Manager:



When selected, this will show all tasks and employees for any site meeting the criteria across the entire date range of the Roster Manager. This will for example allow the user to focus on all sites that have an exception and resolve them. At the point the site no longer meets the inclusion criteria (i.e. the exception has been cleared), it is immediately hidden from view.

In this way a user can easily work through their exceptions until they have cleared them all at which point nothing will be displayed.

Shift times

The *Hours* and *Times* toggle buttons allow the user to switch between the two.

		Mon 18/Dec	Tue 19/Dec	Wed 20/Dec	Thu 21/Dec	Fri 22/Dec
	MURPH01/002 - The Green Man	14	14	14	14	14
	MURPH01/002 : 1 -- Daily office clea	14	14	14	14	14
	012120 - Ray Wren : Cleaner	09:00-17:00	09:00-17:00	09:00-17:00	09:00-17:00	09:00-17:00
	012121 - Ray Ansell : Clean	?	?	?	?	?
	QUARR1/002 - The Red Man	14	14	14	14	14

When showing 'times' these will be taken from the contract assignment details, with any planned override applied. As can be seen from the above example, if times are not explicitly entered on the contract, then this will be shown as a question mark.

Amendments may be made to the times using the 'Event pane' (bottom left) of the Roster Manager:

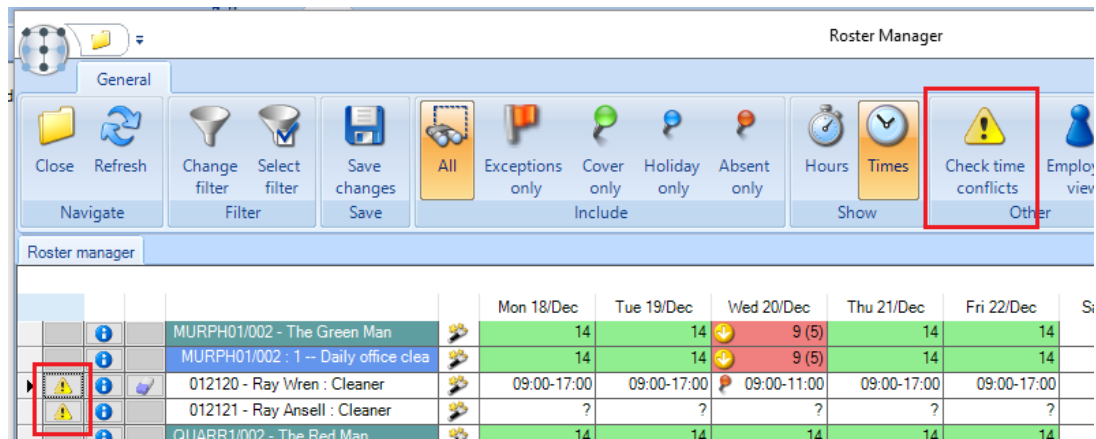
In the above example the employee has 5 hours of planned absence, and the user has manually re-set their working times to reflect the times that they will still be working.

Please note: these times are ultimately communicated to the 'time and attendance' system, and they therefore reflect the expected log in/out times which may not equate to the number of hours due to be worked.

Where a cover employee is assigned for one or more employees, the cover time range will be automatically set based on the earliest start time of the employee being covered, and the total number of cover hours. It is the user's responsibility to review and amend these times as necessary.

Working Time Conflicts

The Roster Manager allows the visibility and amendment of working times, and in addition to this it is also possible to check for conflicts in the working times assigned to each employee. This can be done either for the Roster Manager as a whole, or for a specific employee by using the appropriate button:



When selected, the conflict check will examine ALL sites to which the employee(s) are assigned, and not just those that are visible within the current Roster Manager. The results of the conflict check are displayed for review, but any resolution must be carried out manually by the user:



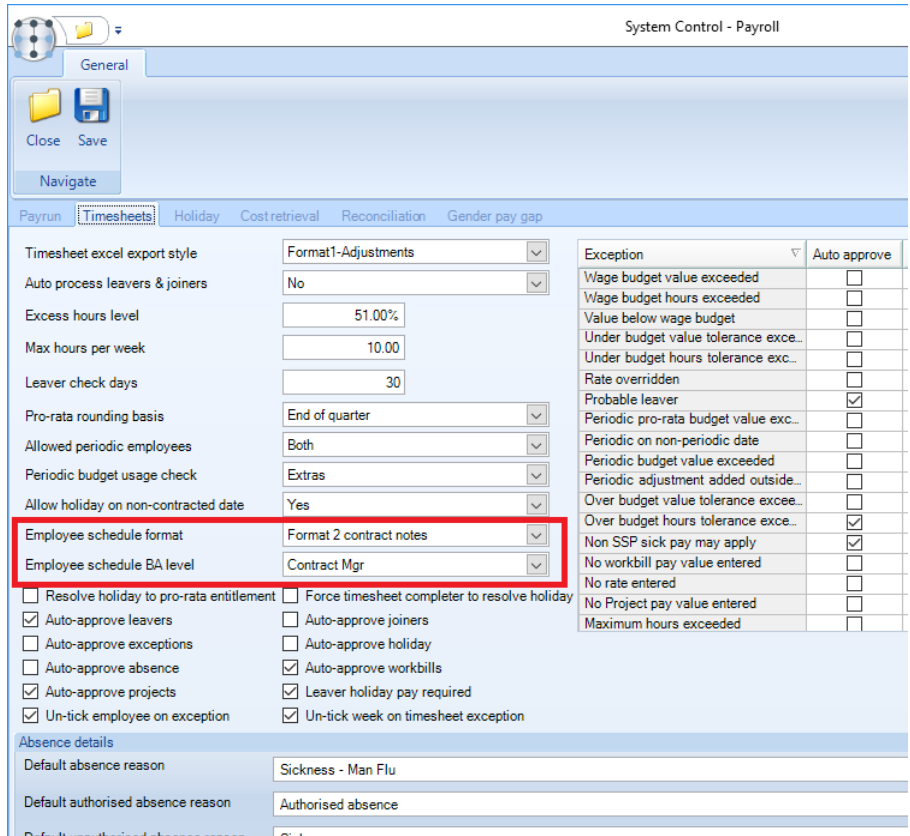
Employee View

Via the roster manager employee view, it is possible to print or e-mail the schedule for a selected employee. Two formats are available, showing different information along with contract schedule notes.

SYSTEM CONTROL

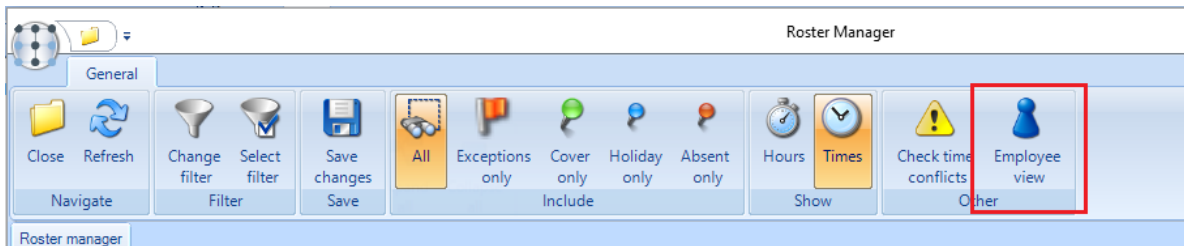
There is an option for *Employee schedule format* on the *Timesheets tab* of the *System Control > Payroll* menu:

Format 1 contains the basic information whereas If format 2 is selected, a further option for *Employee schedule BA level* becomes visible, optionally allowing a single BA level to be nominated to print on the new employee schedule format.

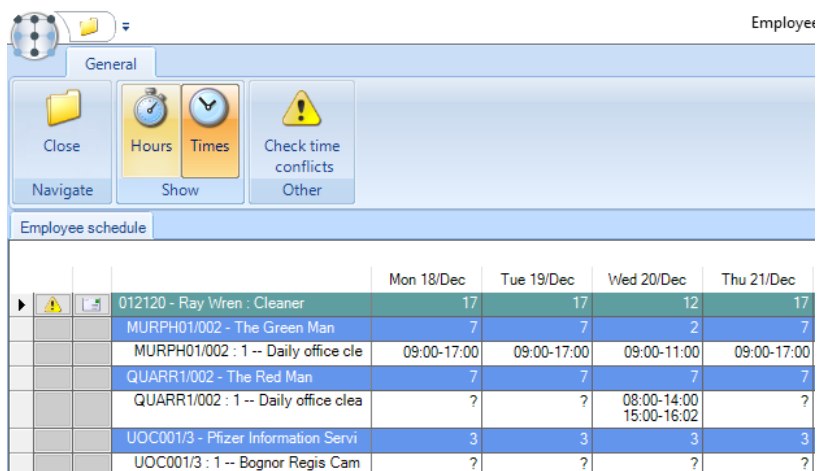


VIEW

The 'Employee view' button provide a full view of the roster by employee:



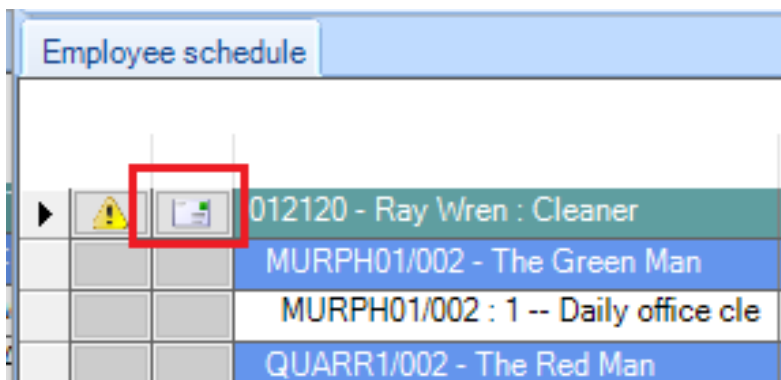
As with the conflict checking, this process includes ALL sites for the employees shown on the Roster Manager, not just those sites currently included. In this way a full picture of an employee roster can be seen:



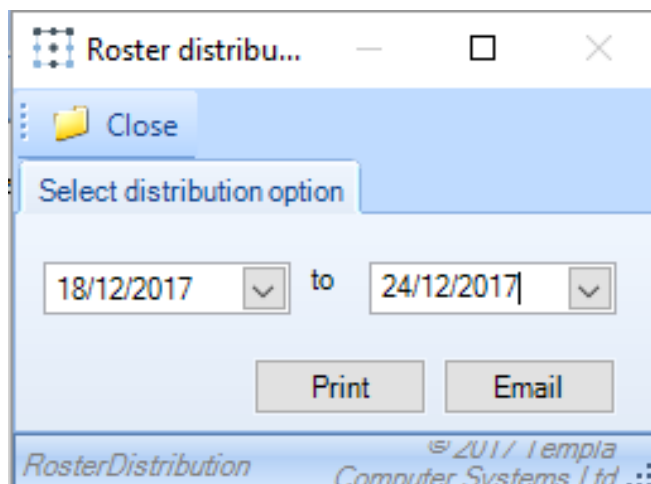
As with the main Roster Manager window, this can be switched between hours and times, as well as providing access to the conflict check. A user cannot, however, amend any details whilst on the employee view.

ROSTER DISTRIBUTION

From the *Employee View* the user can select to distribute (print or email) roster details for an employee by pressing the relevant button:



When selected this allows the user to narrow down the date range is required and decide whether to print or email the document.




When *Format 1* has been selected on *System Control* the resulting document shows the full rostered start and end times for the employee and date range:

Employee Roster Details

Monday 18/12/2017 -- Sunday 24/12/2017

Employee no: 012120
Ray Wren
 6 Ridgeway Crescent Gardens
 Tunbridge Wells



**TEMPLA DEMO
 TECHNOLOGY HOUSE
 MOUNT PLEASANT
 HILDENBOROUGH
 KENT
 TN11 9JG
 VAT reg: 907 1431 48
 Phone: 01732 832888
 E-Mail: DEV@templa.com**

Date	Shift	Hours	Site name and address
Mon 18/12/2017	09:00 - 17:00	7.00	The Green Man, 17 Templebar, Dublin
	00:00 - 00:00	7.00	The Red Man, ,
	00:00 - 00:00	3.00	Pfizer Information Services Ltd, Ashdown, House ME18 6DH
Tue 19/12/2017	09:00 - 17:00	7.00	The Green Man, 17 Templebar, Dublin
	00:00 - 00:00	7.00	The Red Man, ,
	00:00 - 00:00	3.00	Pfizer Information Services Ltd, Ashdown, House ME18 6DH
Wed 20/12/2017	09:00 - 11:00	2.00	The Green Man, 17 Templebar, Dublin
	08:00 - 14:00	7.00	The Red Man, ,
	15:00 - 16:02	0.00	
	00:00 - 00:00	3.00	Pfizer Information Services Ltd, Ashdown, House ME18 6DH
Thu 21/12/2017	09:00 - 17:00	7.00	The Green Man, 17 Templebar, Dublin
	00:00 - 00:00	7.00	The Red Man, ,
	00:00 - 00:00	3.00	Pfizer Information Services Ltd, Ashdown, House ME18 6DH
Fri 22/12/2017	09:00 - 17:00	7.00	The Green Man, 17 Templebar, Dublin
	00:00 - 00:00	7.00	The Red Man, ,
	00:00 - 00:00	3.00	Pfizer Information Services Ltd, Ashdown, House ME18 6DH
Sun 24/12/2017	07:00 - 11:00	2.00	The Red Man, ,
Total hours:		82.00	

Once successfully distributed, the PDF document will be automatically stored for future traceability as an employee level attachment.

Please note: this requires an administrator to define the appropriate attachment type on the *System Control* > *Payroll* tab:

Allow task level pay
 Allow use of sub-contracted employees?

Roster document attachment type

🔍 ⓘ

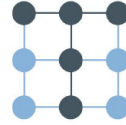
If *Format 2* is selected the document prints as per *Format 1* with the following changes:

- The total hours column has been removed
- A new column has been added next to the shift showing the contract code
- Each of the shifts visible on the employee is shown on a new line
- If an 'Employee schedule BA level has been defined', the site's analysis code description appears next to the site name and address
- If entered, the contract employee schedule notes print as the final column.

Employee Roster Details

Monday 05/08/2019 -- Wednesday 07/08/2019

Employee no: 200
Smith, Jorge
20 Denny Court
ss
ME8 0NZ



TEMPLA DEMO
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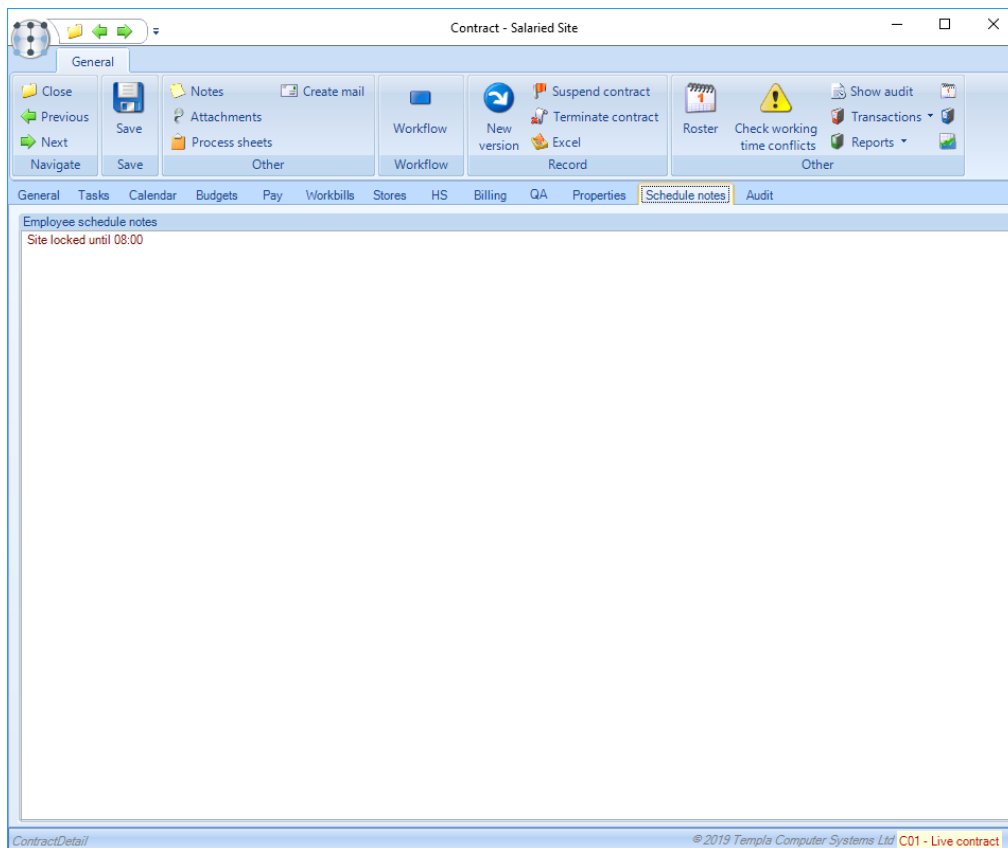
Date	Shift	Contract	Site name and address	Area Mgr	Contract notes
Mon 05/08/2019	00:00	AER001/1	Aerial Suppliers Ltd, 12, West Midlands MN11 1 AZ	AM 06	CHECK CLOCKING IN TIME
	00:00	REV REP/01	REV REP,	AM 01	
	04:00	SAL001/1	Salaried Site, ADD, PCAAA	AM 01	Site locked until 08:00
Tue 06/08/2019	00:00	AER001/1	Aerial Suppliers Ltd, 12, West Midlands MN11 1 AZ	AM 06	CHECK CLOCKING IN TIME
	00:00	REV REP/01	REV REP,	AM 01	
	04:00	SAL001/1	Salaried Site, ADD, PCAAA	AM 01	Site locked until 08:00
Wed 07/08/2019	00:00	AER001/1	Aerial Suppliers Ltd, 12, West Midlands MN11 1 AZ	AM 06	CHECK CLOCKING IN TIME
	00:00	REV REP/01	REV REP,	AM 01	
	04:00	SAL001/1	Salaried Site, ADD, PCAAA	AM 01	Site locked until 08:00

Contract schedule notes

It is possible to add *Employee schedule notes* from on the *Schedule notes* tab on contracts.

Access to view and modify the tab are controlled by the following functions respectively:

- 'Contract.ScheduleNotesView' – 'Contract - View schedule notes details'
- 'Contract.ScheduleNotesAmend' – 'Contract - Amend schedule notes details'



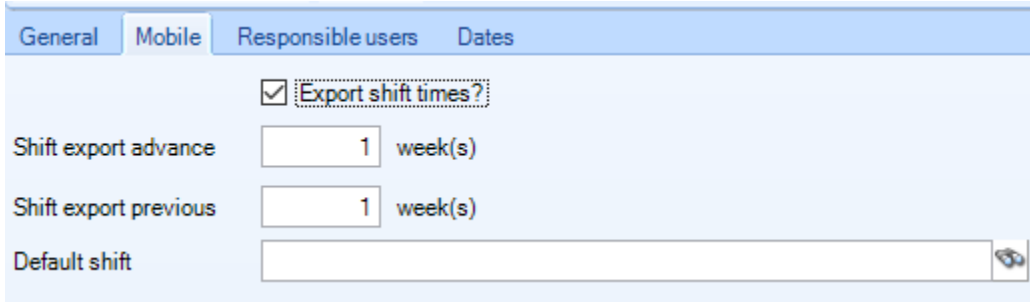
Schedule notes are not held under version control, i.e. a new version of the contract is not required to change them, and any entered notes will be visible on all contract versions. The entered notes will appear on every day of the employee schedule until removed.

Mobile

The roster screen on mobile shows the hours that an employee works. It is also possible to enable the system to show the shift times (where they are known).

EXTERNAL SYSTEM

The external system for mobile gateway has a *Mobile* tab:



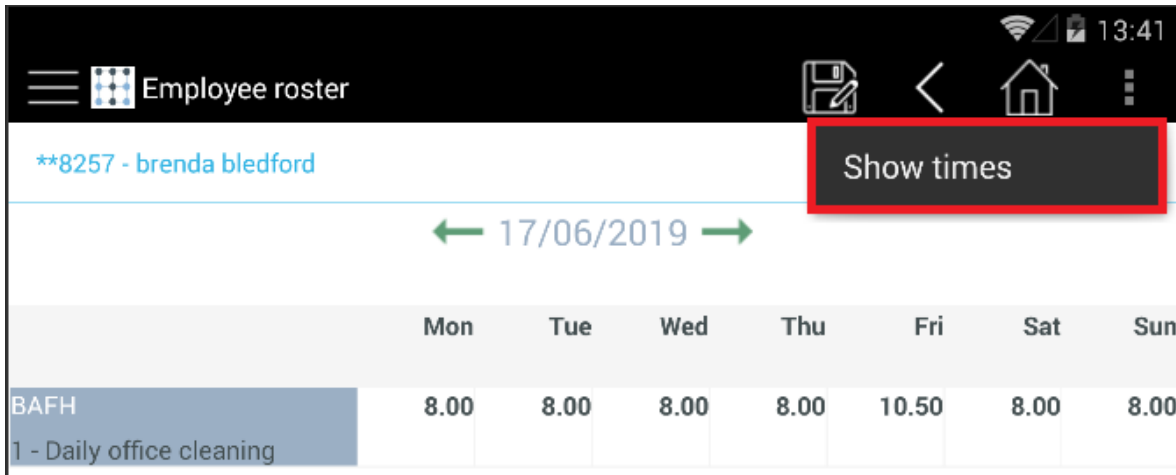
If the *Export shift times* check box is ticked, a nightly batch job will export all shift details for every employee for the defined number of advanced and previous weeks.

A default shift can also be defined which will export shift times for employees that do not have specific times defined on their contracts.

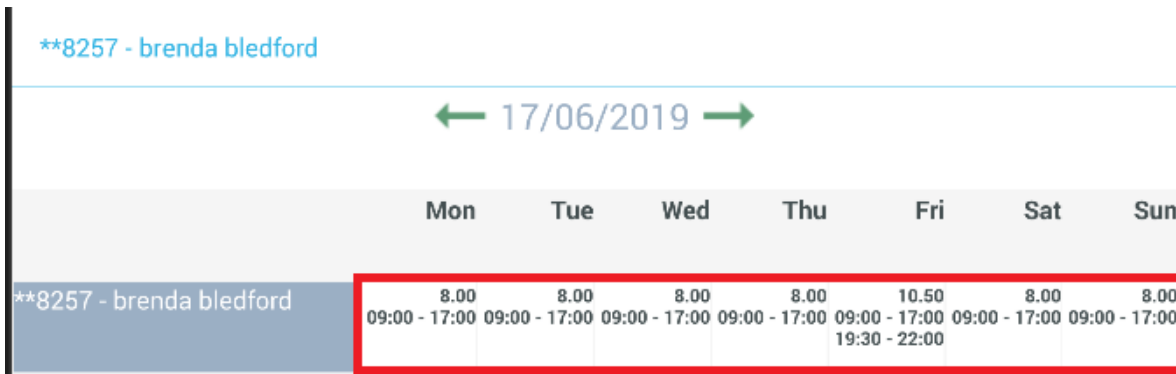
Please note: The greater the number of weeks exported the longer it will take to generate, and the larger the file that is sent to mobile.

MOBILE

The 'Employee roster' and 'Site roster' on the mobile application allow the user to toggle on/off shift times.



When the 'Show times', button is pressed the shift times will be displayed for each day.





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