



# USER GUIDE

## Contents

BEFORE YOU START .....	6
QUICK START .....	7
<b>Ops Home Page .....</b>	<b>7</b>
<b>Add a New Client Record .....</b>	<b>7</b>
<b>Add Activities .....</b>	<b>8</b>
<b>Add Crew Members .....</b>	<b>8</b>
<b>Create a Job Sheet from Ops Home Page .....</b>	<b>8</b>
<b>Create a Job Sheet from Events Page .....</b>	<b>9</b>
<b>Different ways of adding shifts .....</b>	<b>9</b>
<b>Confirm staff via text message SMS Jobs .....</b>	<b>10</b>
CNB (Central Navigation Bar) Tabs .....	11
OPS HOME .....	11
<b>Add a Job Sheet: .....</b>	<b>12</b>
<b>Search Job Sheets .....</b>	<b>12</b>
<b>Ops Home Page Pay Week Table: .....</b>	<b>13</b>
<b>Job Sheet / Invoice / Quote: .....</b>	<b>13</b>
SHIFTS PAGE .....	15
<b>Advanced Shift Search .....</b>	<b>15</b>
<b>Reset Shift Search .....</b>	<b>15</b>
<b>View Shift as Graph .....</b>	<b>16</b>
<b>View Shifts as Calendar .....</b>	<b>16</b>
<b>No. of Shifts and Total Hrs .....</b>	<b>16</b>
<b>Warnings .....</b>	<b>16</b>
<b>Select an Action drop down list .....</b>	<b>17</b>
<b>Shift Page Columns .....</b>	<b>25</b>
JOB SHEET PAGE / EDIT PAGE .....	29
<b>Opening a Job Sheet from Ops Home: .....</b>	<b>29</b>
<b>Opening a Job Sheet from Shifts Page .....</b>	<b>30</b>
<b>Adding a new Job Sheet .....</b>	<b>30</b>
<b>Job Sheet Columns .....</b>	<b>31</b>
<b>Operations Notes (not visible to crew): .....</b>	<b>36</b>
<b>Files Associated with this Job Sheet: .....</b>	<b>36</b>
<b>“Add another Job Sheet for this client in this week”: .....</b>	<b>37</b>

<b>Dashboard / Yellow bar in Job Sheet Page/ Edit page .....</b>	<b>37</b>
<b>Select an Action:.....</b>	<b>39</b>
<b>Offering Shifts and Confirming Crew .....</b>	<b>39</b>
<b>Clicking “CONFIRM” button when a Crew Member is assigned to a Shift .....</b>	<b>41</b>
<b>Job Sheet Reference Number, Description, Templates .....</b>	<b>41</b>
<b>Tags .....</b>	<b>42</b>
<b>Add Extra Feature.....</b>	<b>43</b>
<b>CREW PAGE .....</b>	<b>45</b>
<b>Add a New Crew .....</b>	<b>45</b>
<b>Display Crew in order of Hrs Worked.....</b>	<b>47</b>
<b>Import from CSV.....</b>	<b>47</b>
<b>MYOB Card ID.....</b>	<b>48</b>
<b>Disable and Delete Crew .....</b>	<b>48</b>
<b>CREW GROUPS .....</b>	<b>49</b>
<b>Creating a New Group.....</b>	<b>49</b>
<b>Deleting or Undeleting a Group.....</b>	<b>49</b>
<b>SEARCH CREW .....</b>	<b>49</b>
<b>CLIENTS .....</b>	<b>51</b>
<b>Adding a new client .....</b>	<b>51</b>
<b>VENUES (Google Maps).....</b>	<b>54</b>
<b>Add a New Venue / Venue Edit Page .....</b>	<b>54</b>
<b>Entering a new venue in “Auto Booking Form”, “Shift Edit Page” or “Job Sheet Page” .....</b>	<b>55</b>
<b>Allow Shift Map Checking: .....</b>	<b>55</b>
<b>DELETED SHIFTS .....</b>	<b>57</b>
<b>RATES PAGE.....</b>	<b>58</b>
<b>Adding a New Rate .....</b>	<b>58</b>
<b>CATEGORIES PAGE .....</b>	<b>64</b>
<b>Add New Category.....</b>	<b>64</b>
<b>ACTIVITIES PAGE .....</b>	<b>65</b>
<b>Adding a New Activity.....</b>	<b>65</b>
<b>Activities Main Page .....</b>	<b>66</b>
<b>EVENTS .....</b>	<b>68</b>
<b>Events Tab.....</b>	<b>68</b>
<b>Quote Tab .....</b>	<b>69</b>

<b>Booking Tab .....</b>	<b>71</b>
TASKS PAGE.....	71
EXTRAS PAGE .....	71
DISCOUNTS .....	72
INCOMPATIBLE CLIENT – CREW PAGE .....	72
LEAVE .....	73
UNAVAILABILITY.....	74
ON-CONTACTS.....	75
SHIFT HISTORY .....	75
LOCATION MAP .....	76
MESSAGE PAGE .....	77
<b>MESSAGE Logs Page.....</b>	<b>77</b>
<b>Send an SMS.....</b>	<b>79</b>
AUB (Administrator Utility Bar) Tabs .....	80
BUSINESSES .....	80
<b>Add a New Business.....</b>	<b>80</b>
<b>Add a Business Manager .....</b>	<b>81</b>
PAYROLL .....	83
<b>MYOB Export.....</b>	<b>83</b>
TIMESHEETS .....	90
INVOICES .....	92
<b>Advanced Invoice Search .....</b>	<b>92</b>
<b>“Select an Action” drop down list.....</b>	<b>93</b>
<b>Locking Invoices.....</b>	<b>94</b>
CLIENT BOOKING BLOCK .....	94
GLOBAL SETTINGS .....	95
<b>Administrator User Login Details.....</b>	<b>95</b>
<b>Duty Manager Login Details .....</b>	<b>95</b>
<b>Company Details .....</b>	<b>95</b>
<b>Accounts Details (for Invoices) .....</b>	<b>95</b>
<b>Ops Home Configuration.....</b>	<b>96</b>
<b>Software Configuration.....</b>	<b>97</b>
<b>Client additional information fields .....</b>	<b>106</b>
<b>Crew additional information fields .....</b>	<b>107</b>

<b>Online Shift Acceptance Configuration .....</b>	<b>107</b>
<b>SMS Configuration.....</b>	<b>108</b>
<b>SMS Incoming Configuration .....</b>	<b>110</b>
<b>Footer Configuration .....</b>	<b>110</b>
<b>Terms and Conditions: .....</b>	<b>111</b>
<b>Client Booking Settings (Online Client Login Page) .....</b>	<b>111</b>
<b>Minimum Call Hours .....</b>	<b>111</b>
<b>Email Message.....</b>	<b>111</b>
<b>Time Sheet Configuration .....</b>	<b>111</b>
<b>Pay Period Configuration .....</b>	<b>112</b>
<b>Day Rate, Holidays, and Overtime Configuration .....</b>	<b>112</b>
<b>Other Configuration.....</b>	<b>113</b>
<b>Quote Template Settings .....</b>	<b>113</b>
<b>CLIENT LOGIN PAGE .....</b>	<b>115</b>
<b>Your Details.....</b>	<b>115</b>
<b>View Shifts .....</b>	<b>116</b>
<b>View Webboard.....</b>	<b>116</b>
<b>Making a Booking .....</b>	<b>116</b>
<b>STAFF INSTRUCTIONS.....</b>	<b>118</b>
<b>1. Info for staff using Crew Support page – ONLINE .....</b>	<b>118</b>
<b>2. Info for staff using SMS .....</b>	<b>121</b>
<b>ICAL – Internet Calendar Subscription (Outlook, Google, Ical Calendars).....</b>	<b>123</b>
<b>CREW APP .....</b>	<b>124</b>
<b>TELIFY ADD-ON TO CALL OUT FROM PM USING VOIP ON SNOM PHONES .....</b>	<b>125</b>

# BEFORE YOU START

This manual is created to help users to understand the functions and capabilities of Personnel Manager (PM).

**Key** – All functions and click paths in this manual marked with following letters indicate that only these user types have access to that particular page/action.

**A:** User type – Administrator

**C:** User type – Crew

**CL:** User type – Client

**DM:** User type – Duty Manager

**M:** User type – Manager

**CNB** – Central Navigation Bar (located under logo) contains links to pages:

Ops Home | Shifts | Crew | Crew Groups | Search Crew | Clients | Venues | Deleted Shifts | Rates | Categories | Activities | Events | Tasks | Extras | Discounts | Incompatible Client-Crew | Leave | Unavailability | On-Contacts | Shift History | Location Map | Message (current credits)

**AUB** – Administrator Utility Bar (located at the top left of screen) contains links to pages:

Businesses | Payroll | Invoices | Client Booking Block | Global Settings

# QUICK START

Please log in to your Personnel Manager using the log in details given to you by PM technical support team. If you would like to visit the demo version of PM please follow the link below:

<https://secure.personnelmanager.com.au/demo/>

## Log in as an Administrator:

User Type: Administrator

\*User Name: **test**

\*Password: **test**

(\*) Case sensitive

## Ops Home Page

**CNB > Ops Home A / DM / M**

Personnel Manager opens automatically on the Ops Home Page. This page displays Job Sheets, Quotes and Invoices for a certain business for a pay week. The default pay week is Mon – Sun. If View All Companies Details On (VACD) is selected (top right hand corner of the screen) the Ops Home Page will display the Job Sheets for all businesses, divided into Pay weeks. If View All Companies Details Off (VACD) is selected (top right hand corner of the screen) the Ops Home Page will display the Job Sheets only for the selected business, divided into Pay weeks.

*TIP - The pay period can be changed in Global Settings. **AUB > Global Settings > Pay Period Configuration A***

*TIP - Quotes and Invoices can be switched on or off in Global Settings. **AUB > Global Settings > Ops Home Configuration > Enable Quotes/Enable Invoices A***

Once a Job Sheet has been added (see “Add a new Job Sheet” for more info), the Quote and the Invoice are automatically created if Invoices and Quotes are enabled in Global Settings. The database can assign a Job Number to each Job Sheet automatically or a unique Job Number can be entered. The corresponding Quote and Invoice share this same Job Number.

*TIP - To activate unique Job Numbers, enable Inhouse Client Reference Numbers in Global Settings. **AUB > Global Settings > Show Inhouse Client Reference Numbers/Use Inhouse Client Reference Numbers A***

## Add a New Client Record

**CNB > Ops Home A / DM**

**IMPORTANT!** To add a new client you must first access Superuser mode by clicking “View All Company Details” in the top right corner of the screen and make sure it says “ON”. Only the Superuser has authority to add a new client.

Click the Client tab under the Personnel Manager logo

Click “Add a New Client Record”

Add your client’s details into the fields provided

Click Add/Edit Client to save

*TIP – You can enter your own Project Managers as your clients if you intend to use the Personnel Manager as an internal roster system*

### **Add Activities**

**CNB > Activities > Add New Activity A / DM**

This is where you add the Activities your staff will be performing such as ‘Accountant’ or ‘Cleaner’. You can enter as many different Activities of your choice as you like.

Click the Activities/Rates tab under the Personnel Manager logo

Click Add an Activity

Type the name of the activity in the field Activity Name

Assign staff to Activity.

Click Add/Edit Activity to save

### **Add Crew Members**

**CNB > Crew > Add a New Crew A / DM / M**

Click the Crew tab under the Personnel Manager logo

Click Add a New Crew Member

Add your crew member’s details into the fields provided

Click Add/Edit Crew Member to save

### **Create a Job Sheet from Ops Home Page**

**CNB > Ops Home > Add a Job Sheet A / DM / M**

Click the Ops Home tab under the Personnel Manager logo (this is the Personnel Manager default page)

Select a Client from the drop down tab, input the date in the box provided (dd/mm/yy) or click on the little calendar icon and select a date for your shifts.

Click Add a Job sheet to open the new Job Sheet you have created.

Type in the details of first shift/s you want to enter

Enter the quantity of shifts, Date (dd/mm/yy), Time On (Shift Start Time), Time Off (Shift End Time), Crew Name (select staff member from a drop down box), Activity, Venue, Meeting Place/Address, Onsite Contact Name, Onsite Contact No, Client Job No (PO Number), Notes (to be sent to crew when they are confirmed)

Press SAVE

### **Create a Job Sheet from Events Page**

**CNB > Events > New Event A / DM / M**

Click “Events” tab on the CNB,

Click “New Event”,

Enter details,

Press Create.

### **Different ways of adding shifts**

Here are a few ways of adding shifts explained. For more details please look up the corresponding topic name.

**Create a job sheet:** As explained under “Create a Job Sheet” job sheets can be created manually from scratch by clicking the “Add a Job Sheet” button in Ops Home Page. **CNB > Ops Home > Add a Job Sheet A / DM / M**

**Copy Shifts:** Any shifts in job sheets can be copied by using “Copy Shift” command which can be found in “Select an Action” drop down list at the bottom of the Shifts page or Job Sheet/Edit Page. **CNB > Shifts > Select an Action > Copy Shift A / DM / M** or **CNB > Job sheet/Shift Edit Page > Select an Action > Copy Shift A / DM / M**

**Repeat Shifts:** This option can be used if there are any repeating jobs occurring on consecutive days, weeks or months, which PM basically creates and copies the current shifts into new job sheet (with a new job sheet number) repeating however many times it’s entered in the dialogue box that appears when clicked on “Repeat Shifts”. **CNB > Shifts > Select an Action > Repeat Shifts A / DM / M**

**Using Templates:** On any job sheet page it is possible to save a template of the job sheet. This can later be opened to recreate a previously existing job sheet with new dates to save you the effort of entering all the information into a new job sheet each time. **CNB > Ops Home > [Job sheet number] A / DM / M** or **CNB > Shifts Page > [Shift Number] A / DM / M**

**Client Login Page:** if allowed in client profile page each of your client, using their own login page, can make bookings which creates new job sheets. Clients can also be assigned in Global Settings to edit their bookings. This option allows the selected clients to see full crew list and copy/repeat shifts send SMS's to crew.

**Using “Events” tab:** Click “Events”, search for the booking you wish to add shifts in, select the booking by clicking the circle next to it, click “Quote” tab, and click “Add Crew”.

### **Confirm staff via text message SMS Jobs**

**CNB > Ops Home > [Job Sheet Number] A / DM / M**

**CNB > Shifts > [Shift Number under “No.”] A / DM / M**

Once you have created a Job Sheet you can select the staff members you want from the drop down list under the title Crew Name

This can be done in either the Job Sheet or the Shifts Page (all editing can also be done in the shifts page by clicking edit icon at the right hand side of each shift line. The Job Sheet is only for data entry).

To SMS the details of a shift to a staff member scroll to the bottom of the page and select “MESSAGE Confirm Shifts” in “Select an Action” drop down list.

In the Shifts Page you can select the shifts either by clicking the tick box to the left of a shift or shifts or by clicking anywhere on the line. Then you can click the pencil icon (edit record) to the right of any of the selected shifts to enter Shift Edit Mode. From here you can press “Confirm” or select “MESSAGE Confirm Shifts” in “Select an Action” drop down list which will notify all of your staff members via text message of the details of their shift.

# CNB (Central Navigation Bar) Tabs



**CNB** – Central Navigation Bar (located under logo) contains links to pages:

Ops Home | Shifts | Crew | Crew Groups | Search Crew | Clients | Venues | Deleted Shifts | Rates | Categories | Activities | Events | Tasks | Extras | Discounts | Incompatible Client-Crew | Leave | Unavailability | On-Contacts | Shift History | Location Map | Message (current credits)

**AUB** – Administrator Utility Bar (located at the top left of screen) contains links to pages:

Businesses | Payroll | Invoices | Client Booking Block | Global Settings

## OPS HOME

**CNB > Ops Home A / DM / M**

Personnel Manager opens automatically on the Ops Home Page. This page displays Job Sheets, Quotes and Invoices for a certain business for a pay week. The default pay week is Mon – Sun. The pay period can be altered in Global Settings Page under Pay Period Configuration. If View All Companies Details On (VACD) is selected (top right hand corner of the screen) the Ops Home Page will display the Job Sheets for all businesses in a pay week. When View All Companies Details Off (VACD) is selected the Ops Home Page will only display Job Sheets for the selected Business. Job Sheets are displayed from previous week onwards by default. A date range can be entered to Search Job Sheets.

Once a Job Sheet has been added, the Quote and the Invoice are automatically created. The database assigns a Job Number to each Job Sheet automatically. The corresponding Quote and Invoice share this same Job Number.

If a Job Sheet is created that spans more than one pay week, it will appear, with the same Job Number in each pay week in which it appears and it will also display a “+” next to it. Clients can enter bookings through their access which will also create job sheets. In this case the Client Name to the left of the job sheet will appear yellow. Until a job sheet has been ‘locked’ (all the shifts inside the job sheet have been ‘locked’) the job sheet will appear red and underlined. Once all the shifts inside the job sheet have been ‘locked’ it will turn black, signifying that all shifts have been completed, times have been ‘signed off’ and the Invoice can now be sent.

**Colour codes:**

PM shows the meanings of each colour code when mouse is hovered on each Job sheet / Invoice / Quote number.

Red: Means that invoice or quote has NOT been sent to client.

Green: Invoice or Quote has been emailed to clients. Green coloured job sheet number means there are still unlocked shifts in the job sheet.

Black: Black coloured quote number means it has been approved by client. Black coloured job sheet number means all shifts have been locked.

### Add a Job Sheet:

CNB > Ops Home A / DM / M

The screenshot shows the Personnel Manager web application. A blue arrow points to the 'Add a Job Sheet' button in the sidebar. The main content area displays a search bar and a table of job sheets for three weeks. The table has columns for Client, Company, Client Ref No., Description, Job Sheet, Invoice, and Quote. The job sheets are color-coded: red for 'Not Sent', green for 'Emailed', and black for 'Approved'.

Client	Company	Client Ref No.	Description	Job Sheet	Invoice	Quote
SEP	My Company	SEP 27 June (17-04)		SEP 27 June (17-04) (24-04)	SEP 27 June (17-04) (24-04)	SEP 27 June (17-04) (24-04)
SEP	My Company	SEP 27 June		SEP 27 June	SEP 27 June	SEP 27 June
SEP	My Company	SEP 27 June (17-04)		SEP 27 June (17-04) (01-05)	SEP 27 June (17-04) (01-05)	SEP 27 June (17-04) (01-05)
SEP	My Company	SEP 27 June (01-05)		SEP 27 June (01-05)	SEP 27 June (01-05)	SEP 27 June (01-05)

Select a Client from the drop down tab, input the date in the box provided (dd/mm/yy) or click on the calendar icon and select a date for your shifts.

Click "Add a Job sheet" to open the new Job Sheet you have created.

Enter the Date (dd/mm/yy), Time On (Shift Start Time), Time Off (Shift End Time), Crew Name (select staff member from a drop down box), Activity, Venue, Meeting Place/Address, Client Job No, Onsite Contact Name, Onsite Contact No, Venue Instructions.

Enter the number of shifts you require in the box

Press SAVE (For more details go to "Job Sheet Page")

### Search Job Sheets

CNB > Ops Home A / DM / M

There are a few search tools that can be used on “Ops Home Page”

To search job sheets by client, start typing first few letters on the line next to “Client:”, select the client once appear in the list and click “Search Job Sheets”

To search job sheets by date enter “From Date” to “Until Date” and click “Search Job Sheets”

To search by job sheet number, enter the number next to job sheet #: and click “Search Job Sheets”

### **Ops Home Page Pay Week Table:**

**Client:** First column shows client name

**Company:** it is the business that the job sheet is created in. If the job sheet contains shifts that’s saved under more than one business, it will show all of them in this column

**Description:** A description can be entered here, which will appear in this column for quick reference, it could be a simple note regarding this job. (See Description under “Job Sheet Page” for more info).

### **Job Sheet / Invoice / Quote:**

Each job sheet number under each column (Job Sheet, Invoice, and Quote) contains a hyperlink and when clicked on any number under each column it will bring up its page respectively.

**Job Sheet:** Click this number to open the entire job sheet page (See Job Sheet Page for more info).

**Invoice:** Click this number to open the invoice, invoices can also be sent from this page. Invoice page comes up with a view of all costs for a final review before sending. All recipients, which are added in the invoice loop in client pages (See “Accounts Names and Email Addresses” under “Clients” for more info) are already selected. So the invoices are always ready to be sent by only clicking “**Email Invoice**” button. If a new recipient needs to be added then the details should be entered in the blank boxes below the list of client contacts. A “Type” of contact, Name, Position and email address can be filled before sending. “**Reset button**” resets all information that’s entered in the new contact line. Once new details are entered and invoice sent this contact will be added in the contact’s list and the invoice loop. Any contact’s entry can be viewed, deleted or edited on each client’s “Client Profile Page”.

A credit card surcharge can be applied at this point right before sending the invoice by ticking the box where it says “**Apply Credit Card Surcharge**”, then enter a name to appear in the invoice (explanation / description), enter the amount to include (%) sign, select a new invoice date if desired and make sure to click “Update Invoice”, then send the invoice.

*TIP: Tick “Apply Management Tax” and add any amount without the (%) sign and update invoice to add any cost or make a deduction / discount. For example type “Tool Hire” and put 100 in the amount to charge \$100 or enter an amount with (-) negative sign to deduct any amount or give discounts. Please remember these amounts are excl. GST.*

**Add Increment** option adds an increment at the end of each invoice number, so an additional increment would make the invoice number to stand out. The difference between adding a “Description” and an “Increment” is increments would appear in the invoices sent to clients.

**Quote:** Click this number to open the quote, which then can be sent from this page. Quote page comes up with a view of all costs for a review before sending. All recipients, which are added in the invoice loop in client pages (See “Accounts Names and Email Addresses” under “Clients Page” for more info) are already selected. So the quotes are always ready to be sent by only clicking **“Email Quote”** button. If a new recipient needs to be added then the details should be entered in the blank boxes below the list of client contacts. A “Type” of contact, Name, Position and email address can be filled before sending. **“Reset button”** resets all information that’s entered in the new contact line. Once new details are entered and quote is sent this contact will be added in the contact’s list and the invoice loop. Any contact’s entry can be viewed, deleted or edited on each client’s “Client Page”.

A credit card surcharge can be applied at this point right before sending the quote by ticking the box where it says **“Apply Credit Card Surcharge”**, then enter a name to appear in the quote (explanation / description), enter the amount to include (%) sign and make sure to click “Update Quote”, then send the Quote.

*TIP: Tick “Apply Management Tax” and add any amount without the (%) sign and update Quote to add any cost or make a deduction / discount. For example type “Tool Hire” and put 100 in the amount to charge \$100 or enter an amount with (-) negative sign to deduct any amount or give discounts. Please remember these amounts are excl. GST.*

**Tags:** All tags created and selected in job sheets are displayed in this column. (See “Tags” under the “Job Sheet Page” for more info).

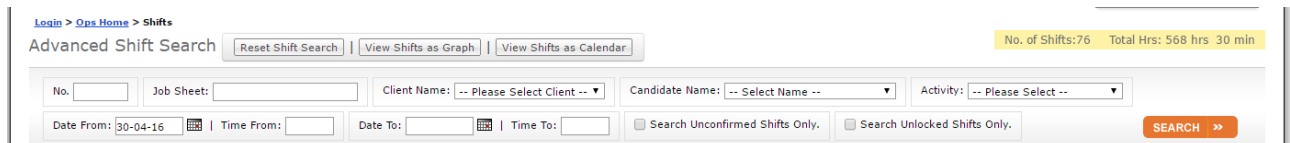
# SHIFTS PAGE

[CNB](#) > [Shifts](#) [A](#) / [DM](#) / [M](#)

Personnel Manager provides great features to view, edit and process many data regarding all personnel activities. All activities as such can be viewed on “Shifts Page” with support of powerful tools like advanced shift search, edit, mark, lock, delete etc...

## Advanced Shift Search

[CNB](#) > [Shifts](#) [A](#) / [DM](#) / [M](#)



Advanced shift search section allows users to pinpoint any shift or job sheet they are looking for. It also filters shifts by crew name, client name, date, time, etc.

**No.:** Type shift number to view that specific shift

**Job sheet:** Put in a job sheet number to view the entire job sheet on shifts page.

**Client Name:** Click on the bar and start typing first few characters of the client name, drop down list will take you to where the client's name is located.

**Crew Name:** Click on the bar and start typing first few characters of the crew name, drop down list will take you to where the crew's name is located.

**Activity:** Another way of narrowing down any shift searches.

**Date From, Time From, Date To, Time To:** Any shift search can be done between the designated not only by date but by time as well.

*TIP: Combine job sheet number with date or time to narrow down your search. Ideal for massive job sheets.*

**Search Unconfirmed Shifts Only:** When dealing with so many unfilled shifts that spans on the entire page, this feature, when checked, shows only unconfirmed shifts (along with selected filters).

**Search Unlocked Shifts Only:** As the name applies, this feature will allow the shifts page to view unlocked shifts only. Ideally used for checking past jobs that are not yet locked.

## Reset Shift Search

Resets all search tools to default (views all shifts from beginning of today).

[CNB](#) > [Shifts](#) > [Reset Shift Search](#) [A](#) / [DM](#) / [M](#)

## View Shift as Graph

When clicked a new page opens with the shifts displayed as a bar graph with the crew names on the left and the shifts represented by different coloured bars on the right below their corresponding Day and Time which is listed above. This page defaults to display 14 days of shifts from Yesterday, to 13 days into the future. Rollovers (flyovers – when you hover the mouse over the shift) display the Name, Client, Activity, Venue, Instructions, Meeting Place, Onsite Contact, Duration, Start Date/Time, and Finish Date/Time. Shifts display in differing colours and for each business in the Personnel Manager. Each business can be expanded/collapsed so it is possible to view the shifts in one or all, or a selection of some businesses at a time. It is possible to scroll from left to right and zoom in and out in this view by using the left/right arrows or clicking the zoom in and zoom out icons.

[CNB > Shifts > View Shifts as Graph](#) **A / DM / M**

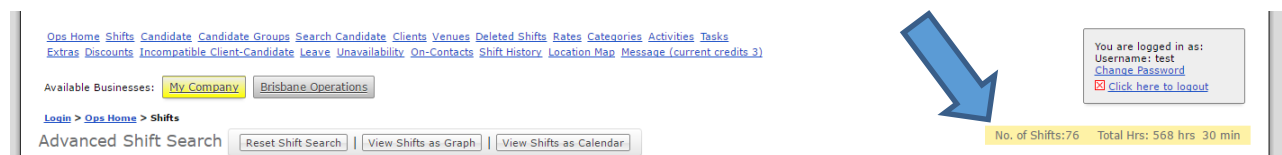
## View Shifts as Calendar

This page defaults to two weeks view, this week and next week with the week commencing on Monday and ending on Sunday. It is possible in this view to scroll back and forward in time, a week at a time. The Calendar view refreshes in real time every two minutes. It displays the calendar in a variety of ways, customisable by the user in Global Settings. Show Start Time on Calendar, Show End Time on Calendar, Show Crew Name on Calendar, Show Crew Mobile on Calendar, Show Crew Shift Number on Calendar, View Calendar by Client/Site. This last feature will break up the calendar into different locations for clients and is not recommended for those seeking a 'typical' calendar view. The Calendar view is also available in the Client Access.

[CNB > Shifts > View Shifts as Calendar](#) **A / DM / M**

## No. of Shifts and Total Hrs

Total number of shifts and hours of current selection.



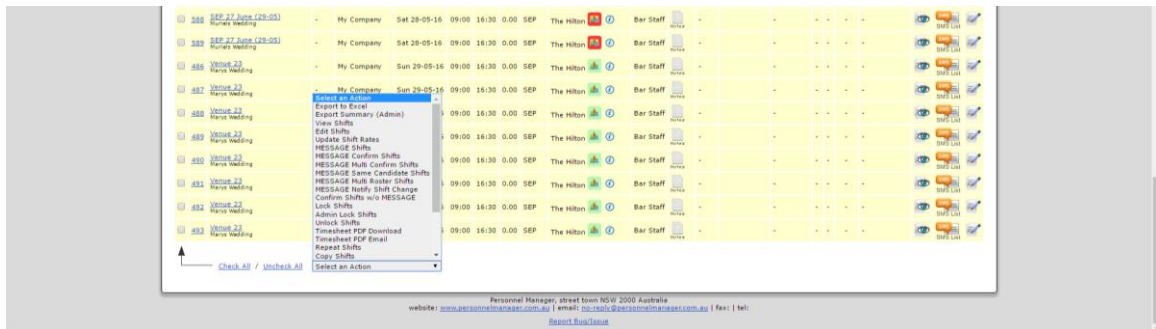
## Warnings

The Personnel Manager will display warnings to inform you if you have double booked a staff member or if their unavailability on a certain day is clashing with a shift they have been booked manually (NOTE: PM will not allow the crew members to mark themselves as unavailable for a shift that you have already booked them for.)

Other warning types are crew that are booked on a "ticketed" activity for which their tickets are expired or not yet entered in their profile (see "Activities" for more info), crew

that have exceeded [x] amount of hours in a week (set in Global Settings), a failed outgoing SMS, and more...

## Select an Action drop down list



**Export Run Sheets:** Exports a detailed run sheet for selected shifts in .pdf format. Useful to view staff's start and finish times and venue and other details in one pdf page.

**CNB > Shifts > Select an Action A / DM / M**

**CNB > Shifts > Select Shifts > Edit Icon > Select an Action A / DM / M**

**CNB > Shifts > [shift number] > Select an Action A / DM / M**

**Export to Excel:** This feature enables you to export selected information from the shifts page to an Excel spreadsheet. This is handy for importing your roster into other packages once the scheduling has been done. You can save an Excel sheet into CSV files or tab\_delimiter files. At the bottom of the Shifts Page, under Select an Action, the first option is Export to Excel. Select the shifts by checking the boxes to the left (or click "Check All" button) and then Select an Action – Export to Excel.

**CNB > Shifts > Select an Action A / DM / M**

**CNB > Shifts > Select Shifts > Edit Icon > Select an Action A / DM / M**

**CNB > Shifts > [shift number] > Select an Action A / DM / M**

**Export Summary (Admin):** Using the same procedure as Export to Excel a summary can be opened in Excel that will break down the selected shifts to show how many shifts were worked on which dates with a breakdown of the different Activities performed, the total hours for each Activity and the total cost of labour to be charged to the Clients on the Tax Invoices.

**CNB > Shifts > Select an Action A / DM / M**

**CNB > Shifts > Select Shifts > Edit Icon > Select an Action A / DM / M**

[CNB > Shifts > \[shift number\] > Select an Action](#) [A / DM / M](#)

**View Shifts:** When you select a shift/s on the Shifts Page (clicking on the box to the left of the shift, or anywhere on the shift that is not a link) you can then press the View Shifts button (the eyeball icon) on the right hand side of any of the selected shift/s to view the shifts details of the selected shift/s. Alternatively, you could select the shift/s and then scroll down to the bottom of the Shifts Page, use the Select an Action drop down list to select View Shifts in order to view the selected shift/s details.

[CNB > Shifts > Select an Action](#) [A / DM / M](#)

[CNB > Shifts > Select Shifts > \[Eye icon\]](#) [A / DM / M](#)

**Edit Shifts:** When you select a shift/s on the Shifts Page (clicking on the box to the left of the shift, or anywhere on the shift that is not a link) you can then press the Edit Shifts button (the pencil icon) on the right hand side of any of the selected shift/s to edit the shifts details of the selected shift/s. Alternatively, you could select the shift/s and then scroll down to the bottom of the Shifts Page, use the Select an Action drop down box to select Edit Shifts in order to edit the selected shift/s details.

[CNB > Shifts > Select an Action](#) [A / DM / M](#)

[CNB > Shifts > Select Shifts > Edit Icon](#) [A / DM / M](#)

[CNB > Shifts > \[shift number\]](#) [A / DM / M](#)

**Update Shift Rates:** When editing details of each shift and swapping crew members along the way whether manually or automatically (confirmation via with SMS) some shifts' rates may not follow the changes properly even after being saved and may need to be updated. This option allows shift rates to be updated with current rate / crew selection, which helps the payroll to issue correct payslips.

[CNB > Shifts > Select an Action](#) [A / DM / M](#)

*TIP: Update Shift Rates before payroll export in each pay cycle.*

*-First select shifts to be updated on Shifts Page,*

*-Scroll down to the bottom of the page,*

*-Click on the drop down menu and choose "Update shifts rates"*

**MESSAGE Shifts:** This option is used when sending out shift offer messages to staff members and it opens up a page that's called the MultiSMS because it allows

you to offer this shift (or multiple shifts) to multiple people. What happens is the default SMS appears in the text box (editable and customisable in Global Settings) with another box with the entire list of Crew in it (only the crew who are assigned to that Activity will appear). In this list, Crew Members that are already booked at that time have an asterisk (\*) next to their name and Crew Members that have entered their Unavailability have a hash symbol (#) next to their name. Any other names would be available crew.

*TIP: If multiple shifts of different kinds (different times, dates...) are selected and pressed MESSAGE Shifts, "one" MultiSMS page opens up with each shift and its own crew list ready to be sent. This method speeds up issuing shifts process.*

If you were to offer one shift to two people, they would both receive the SMS in the textbox asking them if they can do that shift. If they both were to reply with a y (yes) the system will wait a predetermined length of time inputted by you (Global Settings – SMS Incoming Configuration – Incoming SMS Accept Shifts Interval) before awarding the shift to the highest ranked Crew Member by sending them the Confirmed SMS. The unsuccessful applicant will receive a 'decline message' informing them that the shift has already been filled and to standby for more shifts (editable in Global Settings).

Once a MultiSMS has been sent, on the Shifts Page under the SMS field in the Shift/s that you have sent the SMS's for a (?) appears. If the (?) is pressed a little window opens with a list of all the Crew Members you have sent the MultiSMS message to as well as the time and the date message was sent. As Crew reply, a Y or N (yes or no) start to appear next to their names so you can trace the progress of the booking. If at any stage you wish to cancel the sequence and book the Crew manually, you must press the Cancel MultiSMS button inside this (?) window (bottom left). Then you can manually add the crew to the booking and send them the Confirmed SMS. If you attempt to manually assign crew to a shift without cancelling the sequence, the MultiSMS sequence will override what you have done. After a predetermined time set by you in Global Settings, the message will Time Out. This is denoted by a yellow highlighted (T) under the SMS field for that Shift.

**CNB > Shifts > Select an Action A / DM / M**

**CNB > Shifts > Select Shifts > Edit Icon > Select an Action A / DM / M**

**CNB > Shifts > [shift number] > Select an Action A / DM / M**

**MESSAGE Confirm Shifts:** When this is clicked the Confirm Messages for all selected shifts will be opened up. These can be edited or left as is and sent to the intended recipients by pressing the Send SMS button. Once this has been done, in

the Shifts Page the Crew member's name/s will be black with a C after them (under the SMS field) denoting that the Crew Member/s are confirmed for those shifts.

CNB > Shifts > Select an Action A / DM / M

CNB > Shifts > Select Shifts > Edit Icon > Select an Action A / DM / M

CNB > Shifts > [shift number] > Select an Action A / DM / M

**MESSAGE Multi Confirm Shifts:** Same as the "MESSAGE Confirm Shifts" except it generates "one" SMS Confirmation message for multiple shifts "per" recipient.

Confirm MULTI MESSAGE allows you to send several Shifts Confirmations to a Staff Member in one SMS/Email.

*For example: Confirmed:*

*RACV ROYAL PINES RESORT*

*- Wed 08-06, 10:45am-15:00pm. G,*

*- Wed 08-06, 20:15pm-01:30am. G,*

CNB > Shifts > Select an Action A / DM / M

CNB > Shifts > Select Shifts > Edit Icon > Select an Action A / DM / M

CNB > Shifts > [shift number] > Select an Action A / DM / M

**MESSAGE Same Crew Shifts:** The Same Crew SMS features works in two ways.

1. You can book multiple people on several shifts, with a view to keeping consistent staff booked on those shifts, provided you select an equal number of shifts on each occasion. For example, if on the Shifts Page, you had four shifts for four people from 8am to 12pm and you needed the same four people to return on four subsequent shifts, perhaps that evening from 8pm to 11pm, you would have to select all eight shifts (it has to be an even number of both to work, four morning shifts and four evening shifts) and choose "MESSAGE Same Crew Shifts" in the "Select an Action drop down list or press the edit (pencil icon) to enter the Shift Edit Page, then leaving the Crew Member name blank, press "Offer Shift Same Crew". This will bring up the default SMS (customisable, editable) and a crew list of available crew for that Activity. Once again crew that are already booked in all time slots will have an asterisk \* next to their name and those that have entered their own unavailability will have a hash symbol next to their name #. In this Same Crew SMS mode if a Crew Member is already booked for one but not all of the shifts, a \*+ will appear next their name and if they have made themselves unavailable for one but not all of the shifts a #+ will appear next to their name. The message will create one shift number for both (or all shifts) but will offer crew both shifts in the same message. Depending upon how you

have set the default settings for the Same Crew SMS message in Global Settings, the message you send, in the case of this example, may look like this:

*[715] Can you do 2 shifts, Sun 05-07, 07:45am  
– 12:00pm & Sun 05-07, 20:00pm – 23:00pm  
approx., at Cronulla Beach ? Client – X  
Productions. Reply 715y for YES, 715n for NO.  
Await Confirmation.*

The Crew Members are accepting both shifts by replying 715y. With this facility it would be possible to select all eight shifts (four in the morning and four in the evening) and send this message to eight or ten or twelve Crew Members (however many you think necessary to get the job filled). Once again, the system will wait the predetermined length of time that you have programmed into it; the first four of the highest ranking to reply in the affirmative will be awarded the job and will receive the confirmation messages. Those who missed out will receive the declined message to inform them that they will not be needed and to stand by for more shifts. Once again, on the Shifts page, it will be possible to see which shifts have been sent out using the Offer Shifts Same Crew feature because in the shifts, under the SMS field, it will show SC (?) and the shift number created by the system for these shifts, in this example SC (715). There will be the (?) next to the SC (715) of the first of these 'linked' shifts. If you pressed this (?) a list will open of all the crew you sent the Same Crew SMS message to, including the time the message was sent. As you refresh the page you will see Y and N appear after the names of the Crew Members that have responded yes or no to the shifts and the times they responded.

2. The second way that the "MESSAGE Same Crew Shifts" can work is offering multiple shifts (under different clients and job sheets) to one Crew Member, for example, an entire week or fortnight's work. In the Shifts Page, you need to select all the shifts that you wish to offer to the one Crew Member and press the edit (pencil icon) to open the Shift Edit Page. Press the "Offer Shift Same Crew" button, select the crew member you wish to offer the shifts to from the Crew list and press Send SMS. The content of the SMS will say how many shifts are being offered with dates, times and locations.

**CNB > Shifts > Select an Action A / DM / M**

**CNB > Shifts > Select Shifts > Edit Icon > Select an Action A / DM / M**

**CNB > Shifts > [shift number] > Select an Action A / DM / M**

**MESSAGE Multi Roster Shifts:** Multi Roster message option works the same way as the MESSAGE Same Crew Shifts.

Message Multi Roster Shifts allows you to offer several shifts in one SMS/Email to a Staff Member/s. If they accept the Shifts offered, they receive a Confirmation SMS with the details of all their shifts in one SMS/Email.

On the Shifts Page, at the very bottom of the screen under Select an Action, and in the Shift Edit Page and the job sheets pages, there is the option MESSAGE Multi Roster Shifts. This feature allows you to offer multiple shifts to a Crew Member or several Crew Members in a single Message (SMS/Email) per Crew Member. The Crew Member/s just has to reply with a single SMS accept to be confirmed for all shifts.

For example: You could create an entire roster for the following week, select all the shifts you want in the Shifts Page, scroll to the bottom of the page, then under “Select an Action” select MESSAGE Multi Roster Shifts. All the Shifts will be presented in SMS/format for the staff to accept or decline the shifts in one go. When the Crew Members accept the Shifts, they will automatically be sent Confirm Multi Messages (after the predetermined length of time that is customizable in Global Settings under SMS Incoming Configuration, after Incoming SMS Accept Shifts Interval).

**AUB > Global Settings > SMS Incoming Configuration > Incoming SMS Accept Shifts Interval A**

So when using the MESSAGE Multi Roster Shifts feature, you must remember that the automated replies will take as many minutes to send as you have set in Global Settings page.

**CNB > Shifts > Select an Action A / DM / M**

**CNB > Shifts > Select Shifts > Edit Icon > Select an Action A / DM / M**

**CNB > Shifts > [shift number] > Select an Action A / DM / M**

**MESSAGE Notify Shift Change:** This option is used if there is any change on any shifts for which a crew member has already been confirmed and now needs to be notified. Once a change has been made (Date, Times...) select that shift(s) and click this option from the drop down list, which will open up a new page with the default SMS (customisable on Global Settings, editable each time before sending) then click on Send message button. Once the notification is sent asking this particular crew to reply to the question “do you accept the changes?” crew’s name turn green and stay green until crew accepts the changes, which then PM sends an automatic new Confirmation message and turn the name back to black.

**Confirm Shift w/o MESSAGE:** By selecting shift/s and clicking this option you simply make a Crew member/s confirmed for a shift without sending them a

Confirmation message. Their name will appear black on the Shifts Page with a C next to it (under the SMS field) denoting that they are Confirmed.

**Lock Shifts:** Shifts must be locked with the correct times in order to be processed by payroll. Once the start/finish and break times are ensured correct shifts can be locked using this option from the drop down menu. Once locked a padlock icon will appear next to each shift.

**Admin Lock Shifts:** Shifts must be locked with the correct times in order to be processed by payroll. Once the start/finish and break times are ensured correct shifts can be locked using this option from the drop down menu. Once locked a padlock icon with the word ADMIN under it will appear next to each shift. Admin locked shifts can only be unlocked by ADMIN users.

**Unlock Shifts:** This option reverses the Lock or Admin Lock actions.

## Timesheets

Time sheets can be created in .pdf formats by selecting the shifts you wish to include on the Time sheet in the Shifts Page. Under Select an Action at the bottom of the Shifts Page you will find the option to create a Time sheet and either email it directly to someone (you can enter any name and email address you like or start typing a Crew Member's name and it will automatically appear for you) as a PDF attachment to an email, or you can save it directly to your desktop (See Timesheet PDF Email and Timesheet PDF Download for more info).

It is possible to configure the Timesheet to your preferences by going to the Global Settings Page, scrolling down to Timesheet Configuration and editing the parameters found there. You can rename, re-order, hide or delete titles from your Timesheet. Titles include: Job sheet Number, Shift Number, Meeting Place, Crew Member Name, Mobile Number, Signature, Activity, Task, Start Time, Blank Field (blank text box to manually write the start time on the Timesheet), End Time, Blank Field (blank text box to manually write the end time on the Timesheet), Break Start, Break End, Instructions and Notes. [AUB > Global Settings > Timesheet Configuration](#) **A**

### Time Sheet PDF Download:

[CNB > Shifts > Select Shifts > Select an Action > Timesheet PDF Download](#) **A / DM / M**

Creates PDF file of a time sheet with all the details for selected shifts. This file is usually generated to be sent to Crew Chiefs or Supervisors.

## Time Sheet PDF Email:

**CNB > Shifts > Select Shifts > Select an Action > Timesheet PDF Email** **A / DM / M**

Creates a Time Sheet for selected shifts and Opens up a new page, which asks for an email address to send the Time Sheet to.

**Repeat Shifts:** This option can be used if there are any repeating jobs occurring on consecutive days, weeks or months, which PM basically creates and copies the current shifts into new job sheet (with a new job sheet number) repeating it however many times it's entered in the dialog box that appears when clicked on "Repeat Shifts". Ideal to create new job sheets with repeating details (day of the week, start and finish times, number of crew, etc...)

Shift ID	Shift Name	Company	Date	Start Time	End Time
594	Venue 23 Marys Wedding	My Company	Sun 29-05-16	09:00	16:30
595	SEP 27 June (29-05) (03-07) Muriels Wedding	My Company	Tue 28-06-16	09:00	16:30
596	Venue 23 (03-07) Marys Wedding	My Company	Wed 29-06-16	09:00	16:30

REPEAT selected shift(s) for  number of:  
☐ Days OR ☐ Weeks OR ☐ Months  
 OR

**Copy Shifts:** Copies the selected shifts. New shifts are created within the same Job Sheet. If a shift is copied which has a confirmed crew member on it, then the name of the crew is carried over to the copied shift(s) but it appears in blue.

**Unconfirm Shifts:** This option would do the opposite of what "Confirm Shift w/o MESSAGE" does. Select shifts with crew confirmed on them then click on Unconfirm Shifts to turn crew's names to blue. This option does NOT send any SMS to confirmed crew.

**Export Crew Emails:** Exports selected crew's emails and phone numbers into Excel.

**CNB > Shifts > Select an Action > Export Crew Email (Excel)** **A / DM / M**

Export Crew Email allows you to export a list of email addresses of your staff so you can send them a bulk email.

On the Shifts Page, scroll to the bottom and under Select an Action you will find the option, Export Crew Email. The names, email addresses and mobile numbers of the Staff Members on the Shifts you have already selected in the Shifts Page will be exported into an Excel spreadsheet so you can copy this list into the To: field of an email. If a staff member appears on more than one Shift in your Advanced Shift Search, their name, email address and mobile number will only appear once in the Export Crew Email spreadsheet.

For example, you could go to the Shifts Page and select all the Shifts in a given year (or any period of time you have searched). Then you could select Export Crew Email to open an excel spreadsheet containing the email addresses of all the staff who have worked in that period of time. You can easily copy this information into an email that can be bulk emailed to all your staff.

This spreadsheet shows you a list of all Staff members that have worked for you in the time period you have specified.

**Highlight Shifts:** Highlights selected shifts in light yellow colour.

**Remove Shifts Highlighting:** Removes selected shifts highlighting.

**Cancel & Delete Shifts:** If a shifts needs to be deleted and the crew needs to be notified of the cancellation, click this option while shifts are selected. This will open up a new page where a default “Shifts Cancelled” message appears (customisable on Global Settings, editable), then simply click send message. PM will send this SMS to crew and deletes the shift(s).

**Delete Shifts:** Deletes the selected shifts (No messages are sent to crew).

*TIP: Deleted shifts can be restored in “Deleted Shifts” tab on CNB.*

## Shift Page Columns

Advanced Shift Search [Reset Shift Search] [View Shifts as Graph] [View Shifts as Calendar] No. of Shifts: 74 Total hrs: 553 hrs 30 min

No. Job Sheet: Client Name: Please Select Client Candidate Name: Please Select Activity: Please Select

Date From: 01-05-16 Time From: Date To: Time To: Search Unconfirmed Shifts Only Search Unlocked Shifts Only SEARCH

Steve Visa is NOT ticked for the skill 'Bar Staff' on Shift No. 534 Sat 07-05-16: On 09:00 - Off 16:30 | Company My Company  
 Steve Visa is NOT ticked for the skill 'Bar Staff' on Shift No. 535 Sat 14-05-16: On 09:00 - Off 16:30 | Company My Company  
 Steve Visa is NOT ticked for the skill 'Bar Staff' on Shift No. 536 Sat 21-05-16: On 09:00 - Off 16:30 | Company My Company  
 Steve Visa is NOT ticked for the skill 'Bar Staff' on Shift No. 537 Sat 28-05-16: On 09:00 - Off 16:30 | Company My Company  
 David Neil is NOT ticked for the skill 'Bar Staff' on Shift No. 534 Fri 06-05-16: On 09:00 - Off 16:30 | Company My Company

No.	Job Sheet	Lock	Business	Date	On	Off	BTY	Client	Venue	Activity	Notes	Task Name	MESSAGE	H	V	Docs	Phone
534	SEP 27 June (08-05)	-	My Company	Fri 06-05-16	09:00	16:30	0.00	SEP	The Hilton	Bar Staff		Chris Smith		-	-	-	0424 149 194
535	SEP 27 June (08-05)	-	My Company	Fri 06-05-16	09:00	16:30	0.00	SEP	The Hilton	Bar Staff		Chris Smith		-	-	-	0447 003 191
536	SEP 27 June (08-05)	-	My Company	Fri 06-05-16	09:00	16:30	0.00	SEP	The Hilton	Bar Staff		Chris Smith		-	-	-	0490 765 432
537	SEP 27 June (08-05)	-	My Company	Fri 06-05-16	09:00	16:30	0.00	SEP	The Hilton	Bar Staff		Chris Smith		-	-	-	0411 720 765

**No:** Shift Numbers are assigned by PM automatically as they are created.

*TIP: clicking on the Shift No. opens the entire job sheet to which the shift belongs in job sheet page.*

**Job Sheet:** Job Sheet numbers are assigned by PM automatically as they are created.

*TIP: Clicking on the Job Sheet number brings up a new Shifts Page with refined search of this particular job sheet.*

**Lock:** Padlock which indicates whether shifts are locked (completed) or not appear in this column.

**Business:** Shows which Business the shifts are created under.

**Date:** Date 'at the start time' of the shift.

**On / Off:** Indicates start time (ON), finish time (OFF) of shift.

**BTT:** Indicates total amount of break time taken (BTT). Break times can be entered by crew via SMS (See Staff Instructions for more info) or by admin via job sheet page / edit page manually (See Job Sheet Page/Edit Page / Job Sheet Columns / BTT for more info).

By default, break times are added automatically while creating shifts on PM or client's online booking page. And when break times, which are sent by Crew via SMS do not match the automatically added breaks they appear in red on Shifts Page, but just like everything else these breaks can easily be amended on PM by going to Edit Page and clicking on "paper-pencil icon" under BTT.

Having break times appearing as red has no affect to shifts as it's just a warning but please note that "Admin" breaks overrides "crew" breaks and they may need to be corrected (See Job Sheet Page/Edit Page / Job Sheet Columns / BTT for more info).

**Client:** Indicates who the client is.

**Venue:** Venue that crew member will commence the shift at.

**Map icon:** PM helps crew members to look up in their crew pages where exactly the meeting locations are for each shift by clicking on the map icon next to venue names. But these maps should be approved by office staff clicking on this icon on Shifts Page, moving the pin on to the right location and selecting "is ACCURATE" from the drop down list, then selecting "Save". (For more info see Venues / Allow Shift Map Checking)

**"i" icon:** Information icon brings up a small window of venue details. If needed venue details can be edited by clicking on the "Edit Venue" button on this window.

**Activity:** Activities of each shift appear here. (See Activities for more info)

**Notes:** If Notes are entered on the Client Booking Form, or client's page, the Notes Icon on the Shifts Page will turn Red. Notes icon can be clicked on to bring up a small window of text boxes editable by client or office, which can be viewed by crew any time on their crew page, or added to SMS Confirmation messages that sent to crew. Crew are not able to see any text that's entered in the box OPERATIONS NOTES (not visible to crew). This is for your own reference and will not display on the Crew Member's Page. Once the Notes Icon is opened and read it will turn from red to green.

**Task:** When created under the "Tasks" tab any task can be selected in Shift Edit Page, which then appears in this column. (See Tasks Page for more info)

**Name:** Name of crew/staff.

*TIP: Click any name to go to crew profile pages.*

**MESSAGE:** Indicates the status of outgoing SMS Messages. (See “MESSAGE Shifts” under “Shifts Page – Select an Action” for more info regarding sending out shifts to crew and “Message Logs Page” for more info regarding SMS Codes)

**M:** (Multi SMS), one shift has been sent to crew (1 or more) using the “Offer Shift Message” option. Last 3 digits of shift number becomes the acceptance (or decline) code for this shift.

**L:** (Linked shifts SMS), more than one shift of the same kind has been selected (linked) and sent to crew using the “Offer Shift Message” option.

*For example 5x general crew shifts starting and finishing at the same time at the same venue sent to “x” amount of crew.*

PM assigns the last 3 digits of the shift with the lowest shift number and shows L[xxx] on each shift.

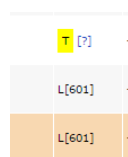
**SC:** (Same Crew SMS), 2 or more shifts from different hours/dates/venues... have been sent together to crew aiming to confirm the same person on all of them. All shifts must be selected first then “Offer Shift Same Crew” must be clicked.

*For example a 4hr shift on Monday, 3hr shift on Wednesday and 5hr shift on Saturday can all be sent together in one SMS as a package offer.*

PM assigns the last 3 digits of the shift with the lowest shift number and shows SC[xxx] on each selected shift.

**S:** (Single Shift Sent), If a name from the crew list has been selected manually and entered in any shift and shift is saved, but not yet confirmed name appears in blue. If this name is now sent an “Offer Shift Message” name turns to green and an “S” appears in the “MESSAGE” column. Another occasion an S appears in this column is; if a “Time Change” SMS has been sent to crew waiting to be confirmed. (See “Time Change” under “Shifts Page” and “Select an Action”)

**T:** Highlighted “T” means that the “Offer Shift Message” has been timed out and no incoming acceptance messages will be confirmed after this point. Time out period can be determined in Global Settings.



T [?]	-
L[601]	-
L[601]	-

**Job Requirement Boxes (Hard hat, Hi-vis vest...):** Once customised in Global Settings common job requirements appear as columns in Shifts Page and can be easily reviewed if any of the requirements are assigned to any shifts.

**Docs:** After documents are uploaded to any job sheet (See Job Sheet Page on how to) an icon appears next to each shift in that job sheet which says 'unread'. Once crew logs in to crew page and opens that document this icon turns green and appears as 'read', so that it can be followed up by office staff whether crew has read the important docs.

**Phone:** Phone numbers of crew

**Eye Icon:** Goes to edit shift page for all selected shifts.

**SMS List Icon:** Show all incoming SMS messages sent by this crew since the day before (dates can be filtered in this page).

*TIP: If crew members fail to lock their shifts by sending it in the wrong format this window can be used by searching through all SMS sent by this crew member.*

**Edit Shift Icon:** Opens all "selected" shifts in edit mode.

# JOB SHEET PAGE / EDIT PAGE

CNB > Ops Home > [Job sheet number] A / DM / M

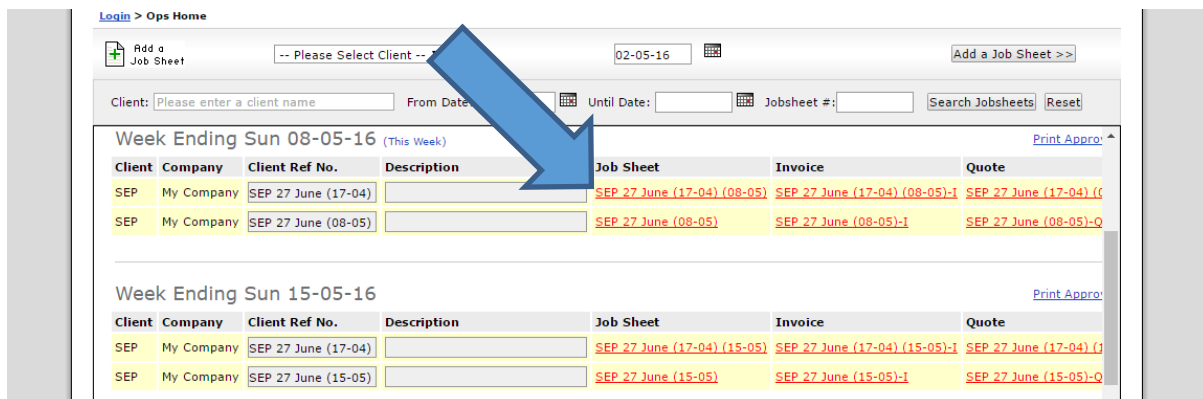
CNB > Shifts Page > [Shift Number] A / DM / M

A job sheet is a collection of shifts for one client created under one job sheet number. Each job sheet automatically creates a corresponding Invoice and Quote (If selected in Admin) and share this unique number. All details of job sheets can be edited/viewed on this page. Also SMS messages can be sent to crew and shifts can be locked. Job Sheet Page can be opened either from Ops Home or Shifts page:

Edit Page on the other hand looks very similar but it only opens by “selecting” shifts (could be from different job sheets) and clicking the “pencil” icon on the right side of any of the selected shifts on Shifts Page.

## Opening a Job Sheet from Ops Home:

To open an existing job sheet please click on its number under the Job Sheet column.



The screenshot shows the 'Ops Home' interface. At the top, there's a navigation bar with 'Login > Ops Home'. Below it, there's a search bar with 'Add a Job Sheet' and 'Please Select Client'. A date selector shows '02-05-16'. A table of job sheets is displayed, grouped by 'Week Ending Sun 08-05-16 (This Week)'. The table has columns: Client, Company, Client Ref No., Description, Job Sheet, Invoice, and Quote. A blue arrow points to the 'Job Sheet' column header. Below the first table, there's another table for 'Week Ending Sun 15-05-16'.

Client	Company	Client Ref No.	Description	Job Sheet	Invoice	Quote
SEP	My Company	SEP 27 June (17-04)		SEP 27 June (17-04) (08-05)	SEP 27 June (17-04) (08-05)-I	SEP 27 June (17-04) (08-05)-Q
SEP	My Company	SEP 27 June (08-05)		SEP 27 June (08-05)	SEP 27 June (08-05)-I	SEP 27 June (08-05)-Q

Client	Company	Client Ref No.	Description	Job Sheet	Invoice	Quote
SEP	My Company	SEP 27 June (17-04)		SEP 27 June (17-04) (15-05)	SEP 27 June (17-04) (15-05)-I	SEP 27 June (17-04) (15-05)-Q
SEP	My Company	SEP 27 June (15-05)		SEP 27 June (15-05)	SEP 27 June (15-05)-I	SEP 27 June (15-05)-Q

*TIP: Hold down the “Ctrl” key to open the page in a new browser tab.*

For “how to search for existing job sheets” please see “Ops Home” tab.

A sample job sheet page would look like the following. At the bottom of the page there is a yellow dash board with quick access buttons for different actions which can also be selected from the more detailed “Select an action” drop down list located below the buttons.

## Opening a Job Sheet from Shifts Page

Click any shift number located under “No.” column in Shifts Page to open the corresponding job sheet. (See Shifts Page Columns for more info)

## Adding a new Job Sheet

A new Job Sheet can be created from scratch from the Ops Home Page by choosing a client and clicking “Add a Job Sheet”. (See Ops Home Page for more info)

When a new job sheet has been created PM automatically assigns a number, but a job sheet exists only after at least one shift has been created in it. To do so at least date, time on and time off must be filled in in “New Shift” section of the job sheet.

**Qty:** The number which you type in the box here, will be the amount of times this shift will be repeated once you click “Save” button.

*For example if you have ten people working on this shift, you type 10 in the box and the row will be duplicated 10 times.*

*TIP: Pressing Tab will advance you to the next field. Pressing Shift + Tab will take you back to the previous one.*

**The Date, Time On and Time Off:** The date is to be entered in DD-MM-YY format. Time on and Time Off must be entered in 24hr format e.g. 00:00 or 17:45. See below for more details.

Click “Save” to add shifts.

## **Job Sheet Columns**

### **No:**

A Shift Number, assigned to each shift automatically by the database, is listed under No. to the left of the Date.

*TIP: In "Edit Page" view shift numbers appear as hyperlinks (Not in Job Sheet Page view). When clicked on shift numbers it opens the corresponding invoice page for a quick view.*

### **Copy:**

Copies shifts as many times as needed through a dialog box that opens when clicked on the "Copy" icon. Even if multiple shifts are selected clicking "copy" icon will only work for that specific shift and not all selected shifts.

### **Lock:**

Padlock which indicates whether shifts are locked or not appear in this column. (See "Lock Shifts" under "Dashboard" / "Job Sheets Page" for more info)

### **Date:**

The date is to be entered in DD-MM-YY format.

*It will default to Sunday of the current week.*

*Always check the month is correct at the beginning/end of months as the date may default to the previous or following month.*

*Always check the date is correct after entering either 24:00 or 00:00 to make sure that it has not changed the intended day.*

*Once you have clicked "Save" the day of the week will also appear to the left of the date.*

### **Time On:**

This must be entered in 24hr format e.g. 00:00 or 17:45

*The ":" (Colon) can be substituted for a "." (Full stop) so to enter 03:30 you can simply type 3.3*

*For 15:00 you can simply type 15 and press Tab.*

*00:00 refers to midnight at the very start of the day.*

*24:00 refers to midnight at the very end of the day.*

*If you type 24:00 on a Monday the database will automatically translate it to 00:00 on the Tuesday.*

**Time Off:**

The same rules apply for Time off as for Time On.

If a shift commences on one day and finishes on another, you can enter the finish time in either day's time.

*E.g. If a shift commences at 22:00 pm on Mon 02-04-17 and finishes at 02:00 am on Tue 03-04-17, then you can enter either 26 or 2 as finish time and the database will correct the finish time to 02:00 am.*

**Hrs:**

Shows total working hours after break times are deducted.

**Rate, Paid and Charge:**

Rates are assigned by adding or editing an Activity in the Activities Page. (See "Activities Page" for more info)

Pay Rates and Charged Rates can be entered under the "Activities" tab.

"Paid" is what your staff will be paid per hour for conducting this activity between the indicated time period and "Charge" is what the client will be invoiced for this particular shift.

In the Global Settings Page, if "Hide Pay and Charge Columns" is switched to "Yes", the Charge and Paid rates will not appear in the Job Sheet.

**Pay Date:** Shows the date of pay.

	No.	Copy	Lock	Date	Time On	Time Off	Hrs	Rate	Paid	Charge	Pay Date	BTT		Candidate Name	MESSAGE	Activity
<input type="checkbox"/>	534			Fri 06-05-16	09:00	16:30 <a href="#">Add</a>	7.50					0		1. David Neil		Bar Staff
					09:00	16:30	7.50	standard standard	38.50	80.00						
								<a href="#">Add Extra</a>								

**Bonus:**

Bonus box can be selected for a bonus for crew or deselected if you do not wish the crew member to get the bonus rate for that shift.

Bonuses can be set under Activities tab on CNB.

In the Global Page, there is a "Bonus" tab. If you click this you have the option to have Bonus On or Off, and you have the ability to enter the bonus amount. If Bonus mode (global) is switched on, then the amount specified for the bonus will be added to the rate. If Bonus mode is switched off, the bonus box will not appear in the Job Sheet and the actual rate will apply.

**BTT (Break Times Total):**

Indicates the total amount of break times per shift. Break times can be edited by clicking on “Paper-Pencil” icon next to BTT column. A new window appears where breaks can viewed if entered by crew members via SMS while locking their shifts. Admin user can also enter any breaks manually simply by entering start and end times.

Please note that breaks entered by Admin users override crew breaks.

If any breaks are entered by crew via SMS by accident and no breaks should be entered Admin user **must** put in an entry to override crew break and neutralise it by simply putting in i.e.: 12:00 – 12:00 etc.

### **Crew Name:**

Crew Member’s name is entered here and can either be selected from the drop down list or a key word can be typed which will show the matching names then a name can be selected from the narrowed down drop down list.

The list will appear empty until you add new crew members using the “Crew” Page.

If any Crew Member is already booked on another shift a (\*) will appear before their name to let you know they are unavailable. The name will also appear in red.

If a Crew Member has made themselves unavailable for a shift on their own Crew Page, a (#) will appear before their name and the name will also be in red.

Once a shift is sent to a crew via SMS and crew member replies “yes”, crew receives a confirmation SMS and the name is put in this box automatically.

*See “Offering Shifts and Confirming Crew” under “Job Sheet Page/ Edit Page” for more info.*

Crew names can also be entered manually then sent a confirmation SMS manually (Name will appear in black). Or simply a name can be entered and saved on the shifts without sending a Confirmation (Name will appear in blue) and lastly name can be entered and sent an “Offer Shift” message (Name will appear in green, until crew replies yes to it, then turn to black).

In the Global Page there is the feature “Permit Crew Member Unavailability to be Viewed by a 3rd Party”. If this feature is switched on then the bookings/unavailability information for crew members will be “shared” by other subscribers to the Personnel Manager software.

### **MESSAGE:**

Indicates the status of incoming or outgoing SMS Messages. (See Message tab for more info)

**Activity:**

An activity must be entered. As soon as you start typing an activity it will auto complete for you.

The activity has to be entered in the Activities/Rates Page first before it will appear in a job sheet.

Once an Activity has been entered, the Rates will be automatically adjusted to match the Activity and Crew Member

Rate A – (amount a person earns per hour between the hours of 08:00 and 20:00) and Rate B – (amount a person earns between 20:00 and 08:00)

**Task:**

A task can be selected in the drop down list. (See Tasks for more information)

**Venue:**

Type the name of the location where you would like your staff member to meet for his/her shift to commence. (It will be the location that is sent to them via SMS and that they can view online on their “Crew Page”).

After typing a few letters venue names that match the key word will appear in the drop down list and can be selected. If venue is not entered in PM it will not appear in the drop down list then simply type the Venue name and press “Tab” or click anywhere on the page. A dialog box will open asking if you would like to create a new venue. Once clicked yes fill out the details and press “Save”. New venue should appear now.

“I” icon will bring up venue details when clicked.

**Room:**

A Room (A location at the venue) can be selected in the drop down list.

New room can be added by clicking “plus” icon next to the drop down list.

This info will not appear in SMS messages sent to crew but will be visible in outgoing emails to crew and also on job details of crew personal pages.

Rooms can be edited / deleted in Venues tab.

**Meeting Place / Address:**

Type the meeting place or the address. Whatever you type here will be remembered by the database for future reference. The next time you enter the same Venue, the previous Meeting Place / Address will appear automatically and can be selected in the drop down list.

New Meeting place can be added by clicking on the “map” icon next to drop down list. Click on the “Add New” and type in the new location name, drop a pin on the map for exact location then press “Add”. (For more info see “Venues” tab)

Meeting points can be edited in Venues tab.

Meeting points appear in SMS Messages sent to crew.

### **Onsite Contact Name and Number:**

Type the name of the person whom your staff member should contact once they arrive at their shift.

New onsite contacts can be added by clicking “plus” icon next to the drop down list. Type the mobile phone number of the Onsite Contact person (or landline including area code)

*Phone numbers must be entered without spaces.*

Contacts will always be remembered by the database for future reference, therefore can be edited or deleted on Client profile pages. The next time you enter the same Onsite Contact Name, the previously entered mobile number will appear automatically. (For more info see “Clients” tab)

### **PO Number or Name of Event:**

Type PO number here. It will appear on the Invoice.

### **NOTES FOR CREW (Client editable):**

Office staff or clients can add notes in this box which would appear in SMS messages sent to crew or can be viewed on online Crew Pages.

*For example “Outdoor job, bring water”*

### **NOTES FOR CREW (Ops section):**

Office staff can add notes in this box which would appear in SMS messages sent to crew or can be viewed on online Crew Pages.

This part cannot be seen by clients.

### **MESSAGE Reminders:**

When ticked Crew member who is confirmed on this shift receives Reminder messages.

There are 2 types of reminder messages to be sent: SMS Reminder 1 would send crew a message before pre-set amount of time of each shift.

*For Example:*

*You can select an SMS Reminder to go out to your staff with the details of their shift at 16:00 the day before their shift*

SMS Reminder 2 can be selected for (X) Mins before commencement of shift and between the hours of (Time) and (Time).

*For Example:*

*You can select a secondary SMS Reminder to go out to your staff with the details of their shift 30 mins before the commencement of their shift if their shift is to take place between the hours of 22:00 and 10:00.*

*This can wake them if they are asleep or alert them if they have forgotten their shift.*

*TIP: In the Global Page, SMS Reminder can be switched On or Off.*

### **Update Rates:**

If a Crew Member is swapped for a Shift, the Rates will not necessarily “update” and may still show rates of previously confirmed crew. Prior to processing Payroll/Timesheets, it is advisable to “Update Rates” which is the same as using Update Rates feature within Shifts Page.

### **Update Breaks:**

Same as “Update Rates” (above) but for breaks not rates.

### **Business:**

Each shift can be moved between different businesses from this drop down list. (For more info see “Businesses”)

### **Operations Notes (not visible to crew):**

When new bookings are entered online clients are given the opportunity to add special instructions, notes or any information regarding the booking. These notes would appear in this section at the bottom of the Job Sheet Page.

### **Files Associated with this Job Sheet:**

Some jobs may require documents with detailed reviews, lists, maps which all can be attached to job sheets with this feature. Once added Crew who are booked on any shift in these job sheets can view the documents online once logged in their Crew Pages.

Click “Upload File” give it a name for crew to see, browse through the computer and select upload.

**“Add another Job Sheet for this client in this week”:**

If you wish to create another Job Sheet for the same client in the same pay week (for instance if you would like different jobs to appear on different invoices), click Add another Job Sheet for this client in this week at the top of the Job Sheet.

Once a new Job Sheet has been opened, you will be required to fill in the following info. The Date, the Time On, Time Off, Crew Name, Activity, Venue, The Meeting/Place Address, Client Job No, Onsite Contact Name, Onsite Contact No., Venue Instructions.

*It is vital to click “SAVE” once data has been entered, before loading another page.*

**Dashboard / Yellow bar in Job Sheet Page/ Edit page**

Located at the bottom of the Job Sheet Page or Edit Page Dashboard consists of quick access buttons and various commands in the drop down list. Before using any of the buttons please ensure that shifts to be edited are selected first.

**Cancel/Delete Button:** Sends a Cancellation SMS (Can be edited in Global Settings) to crew and deletes the shift.

**Time Change Button:** Time or date must be changed before using this feature. If any of the shifts time or date has been updated, when pressed, this button opens a new window with an SMS message ready to be sent to crew informing the time change and asks crew to accept the change. Until the time change has been accepted by crew member, the name will appear in green on “Shifts” page and an “S” (Sent) will appear under the MESSAGE column in Job Sheet page. It turns black if accepted. If crew denies the SMS message the name becomes red on Shifts page and a “D” (Denied) appears under MESSAGE column in Job Sheet page.

**Offer Shift MESSAGE Button:** Please see explanation “MESSAGE Shifts” under SHIFTS Tab.

**Offer Shift SAME CREW Button:** Please see explanation “MESSAGE Same Crew Shifts” under SHIFTS Tab

**Offer Shift MULTI ROSTER Button:** Please see explanation “MESSAGE Multi Roster Shifts” under SHIFTS Tab

**CONFIRM Button:** Please see explanation “MESSAGE Confirm Shifts” under SHIFTS Tab

**CONFIRM w/o MESSAGE Button:** Please see explanation “Confirm Shift w/o MESSAGE” under SHIFTS Tab

*TIP: Press (ACCESS KEY) + C to activate the “Confirm w/o Message” button in the yellow tab at the bottom of the screen.*

*Confirm Shortcut in Chrome:*

*Windows: Alt + C (sometimes Alt + Shift + C)*

*Mac: Ctrl + Option + C*

*Confirm Shortcut in Firefox:*

*Windows: Alt + Shift + C*

*Mac: Ctrl + Option + C*

*Confirm Shortcut on Internet Explorer:*

*Alt + C*

**CONFIRM MULTI Button:** Please see explanation “MESSAGE Multi Confirm Shifts” under SHIFTS Tab

**MAKE UNAVAILABLE Button:** Please ensure that a crew is assigned on the shift first. Once pressed PM takes crew member’s name off the shift and puts in an unavailability for this crew in this time period. See Unavailability for more info.

**LOCK Button:** Please see explanation “Lock Shifts” under SHIFTS Tab

**UNLOCK Button:** Please see explanation “Unlock Shifts” under SHIFTS Tab

**Save Button:** Once you have entered in all the details of a shift correctly, you can click this button to save them. You must always save any changes you make before navigating to another “page” or you will lose them.

*TIP: Press (ACCESS KEY) + S for a shortcut to save the job sheet page you are editing. It works as the “save” button.*

*Save Shortcut in Chrome:*

*Windows: Alt + S (sometimes Alt + Shift + S)*

*Mac: Ctrl + Option + S*

*Confirm Shortcut in Firefox:*

*Windows: Alt + Shift + S*

*Mac: Ctrl + Option + S*

*Confirm Shortcut on Internet Explorer:*

*Alt + S*

*More information about your computer's access key based on browser/operating system is below:*

Chrome	<p>Alt on Windows, FreeBSD, and Linux (Note: Alt + ⇧ Shift is required in some circumstances)</p> <p>Ctrl + ⌘ Opt on Mac</p>
Firefox	<p>Alt + ⇧ Shift on Windows, FreeBSD and Linux<sup>[3][4]</sup></p> <p>Ctrl on Mac (up to v14.0)<sup>[3]</sup></p> <p>Ctrl + ⌘ Opt on Mac (v14.0.1 and higher)</p>
Internet Explorer	Alt

### Select an Action:

Please see “Select an Action drop down list under SHIFTS Tab.

### Offering Shifts and Confirming Crew

Shifts are offered to multiple people at once from a page called the MultiSMS. What happens is the default SMS appears in the text box (editable and customisable in Global Settings) with another box with the entire list of Crew in it (only the crew who are assigned to that Activity will appear). In this list, Crew Members that are already booked at that time have an asterisk (\*) next to their name and Crew Members that have entered their Unavailability have a hash symbol (#) next to their name. Any other names would be available crew.

Start with selecting shifts on Shifts Page or Job Sheet / Edit Page that need to be sent out to crew, Press;

-Select an Action > MESSAGE Shifts; if on Shifts Page, Edit Page OR Job Sheet Page

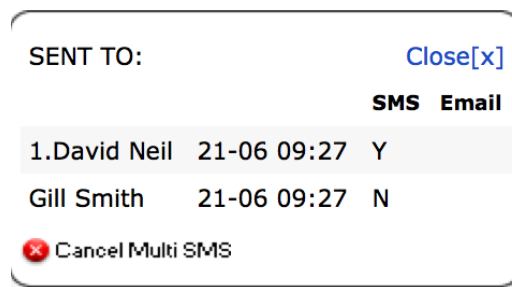
-Offer Shift MESSAGE; on Edit Page OR Job Sheet Page

*TIP: If multiple shifts of different kinds (different times, dates...) are selected and pressed MESSAGE Shifts, “one” MultiSMS page opens up with each shift and its own crew list ready to be sent. This method speeds up issuing shifts process.*

If you were to offer one shift to two people, they would both receive the SMS in the textbox asking them if they can do that shift. If they both were to reply with a “y” (yes) the system will wait a predetermined length of time inputted by you (Global Settings – SMS Incoming Configuration – Incoming SMS Accept Shifts Interval) before awarding the shift to the highest ranked Crew Member by sending them the Confirmed SMS. The

unsuccessful applicant will receive a 'decline message' informing them that the shift has already been filled and to standby for more shifts (editable in Global Settings).

Once a MultiSMS has been sent, on the Shifts Page under the SMS field in the Shift/s that you have sent the SMS's for a (?) appears. If the (?) is pressed a little window opens with a list of all the Crew Members you have sent the MultiSMS message to as well as the time and the date message was sent. As Crew reply, a Y or N (yes or no) start to appear next to their names so you can trace the progress of the booking.



If at any stage you wish to cancel the sequence and book the Crew manually, you must press the Cancel MultiSMS button inside this (?) window (bottom left). Then you can manually add the crew to the booking and send them the Confirmed SMS. If you attempt to manually assign crew to a shift without cancelling the sequence, the MultiSMS sequence will override what you have done. After a predetermined time set by you in Global Settings, the message will Time Out. This is denoted by a yellow highlighted (T) under the SMS field for that Shift.

**The difference between sending out a single shift to a staff member and sending a multi shift;** is that for a multi shift the staff name is left blank in Job Sheet Page / Edit Page prior to clicking Offer Shift MESSAGE button.

Step 1. Shifts Page: Select Shifts for Multi SMS Request

Step 2. Press edit button (pencil icon) far right of one of the selected shifts

Step 3. Press Offer Shift MESSAGE (without assigning staff in this step)

Step 4. Select Staff from the list

Step 5. Press SEND

Once this is done, the shifts will have been linked together. The top shift on Shifts Page will have a (?) under the MESSAGE column. Click this to see the shifts being accepted/declined.

*IMPORTANT: If you wish to manually assign a staff member once the Multi Shift sequence has begun, you MUST click the (?) under the MESSAGE column and press Cancel Multi SMS in that pop up window. Then you will be able to manually assign a different staff member to the one the system will automatically assign.*

If you assign a different staff member without pressing Cancel Multi SMS in the (?) window, the PM will replace your staff member with the one it has been programmed to assign.

### Clicking “CONFIRM” button when a Crew Member is assigned to a Shift

*If a shift has been saved with a crew member assigned to it and you press CONFIRM for that particular shift, the SMS page will bring up the Confirmed message for the selected shift to be sent to the crew member once more.*

*If numerous shifts have been selected then all the SMS will be brought up with their respective Confirmed messages. This message can be modified or completely deleted and a new message can be entered manually.*

*The message will appear: Confirmed: “Date”, “Time On” (Minus 15 mins) until, “Time Off” approx, at “Venue”, “Meeting Place Address”, “Client”, “Onsite Contact Name”, “Onsite Contact Mobile”, cheers*

**For Example** the SMS will appear like this:

*Confirmed: Fri 25-05, 08:15am - 11:30am approx, at Opera House, Stage Door, SHS, Dave Neil, 0412968412, cheers*

### Job Sheet Reference Number, Description, Templates

#### Job Sheet Number:

When selected in Global Settings by ticking the box “Use Inhouse Client Reference Numbers” PM displays 'Inhouse Client Reference Numbers' instead of 'Default Reference Numbers' on Job Sheets, Invoices and Quotes. Then any number or name can be given to Job Sheets “manually”.

#### Description:

Job sheet “Description” allows you to add a description to your job sheets which can be displayed on the Shifts Page in conjunction with your Job sheet number. For Example you could have the Job sheet Number as *Acme XY123* and the Description as *Product Launch*. On the Shifts Page under the job sheet column you will see *Acme XY123/Product Launch* displayed as the Job Number.

This Description can also be exported into MYOB.

You can enter the Description directly into the Ops Home Page in the blank text box under Description then press TAB or inside a job sheet you can enter the Job Number and the Description.

**CNB > Ops Home > Description A / DM / M**

This feature will only be available if it is enabled in Global Settings under Manager Homepage Configuration if Show Inhouse Client Reference Numbers and Use Inhouse Client Reference Numbers are both ticked. **AUB > Global Settings > Manager Homepage Configuration > Show Inhouse Client Reference Numbers and Use Inhouse Client Reference Numbers A**

### **Working with TEMPLATES:**

On any job sheet it is possible to save a template. This can later be opened to recreate a previously existing job sheet with new dates to save you the effort of entering all the information into a new job sheet each time.

Here is how:

- First create a job sheet that you would like to create a template of,
- Click on the drop down arrow next to “Import Template”, choose “Save Template”,
- A dialog box appears to enter the name of the template with a warning: “Please make sure you save any changes before saving a template. Also be aware the use an existing template name WILL OVERWRITE the existing template.”
- Enter a name, click “Okay”,
- Create a new job sheet and click “Import Template” button,
- A dialog box appears asking which template to open. Type a few letters of the name then select it from the drop down list. Then enter the first date to start the job sheet from.

*For Example: if the saved job sheet had 3 shifts on the 1<sup>st</sup>, 3<sup>rd</sup>, and 5<sup>th</sup> of March and if 10<sup>th</sup> of March has been entered as the “First Day”, then PM creates the new job sheet with full details (Times, venue, activities...) of 3 shifts on the 10<sup>th</sup>, 12<sup>th</sup> and 14<sup>th</sup>.*

### **Tags**

Tags are useful when it comes to visually categorising job sheets in “Ops Home” Page where they appear on the far right hand side of job sheet number. Click “Tags” button, a drop down list appears, click “Add New Tag”, click save at the bottom of the Job Sheet Page. Once created all tags will appear in the drop down list under “Tags”, where they can be selected or deselected. Selected Tag will appear in the Ops Home page and can help categorising different job sheets. For example a tag named “Xmas” can be

created and all job sheets related to Christmas can be tagged for an easy view in “Ops Home Page”.

## Add Extra Feature

Add Extra allows you to add extra charges (client) or allowance (staff) to your Shifts at once such as Petrol Allowance, Mileage, Parking, and calculates the pay rate and charge rate times the quantity entered. In the Rate column of shifts click Add Extra to add extra items that can be paid/charged. Once the Add Extra feature is clicked, 4 new boxes will open. Under Time Off you will see QTY. whatever is entered in this box will then be multiplied by the entries in Paid and Charge. The text box in between allows you to Name the Extra. QTY can be left blank if there is just one Extra. You can create several Add Extras.

*Example 1: If you wanted to pay and charge for a Crew Member's Parking, you could go to the Shifts Edit Page, select Add Extra, leave QTY blank and write Parking in the text box under Rate and enter the amount you wish to pay under Paid and the amount you wish to charge under Charge. You can leave either Paid or Charge blank if you wish. Once the correct details are entered press the SAVE button.*

*Example 2: If you wanted to pay and charge for a Crew Member's Mileage, and you wished to pay the Crew Member 70 cents per kilometre for a 100km drive, you could go to the Shifts Edit Page, select Add Extra, enter 100 in QTY and write Mileage in the text box under Rate and enter the 0.70 under Paid and the amount you wish to charge under Charge. Once the correct details are entered press the SAVE button.*

No.	Copy	Lock	Date	Time On	Time Off	Hrs	Rate	Paid	Charge	Pay Date	STT	Candidate Name	MES
550			Fri 06-05-16	09:00	16:30	7.50					0	Breaks	
				09:00	16:30	7.50	standard standard	38.50	80.00				
				Qty:	100	x	Mileage per/km	0.70	0.90				
							<a href="#">Add Extra</a>						

You could in fact Add Extra for Mileage and Add Extra for Parking on any given shift.

Whatever is calculated in the Paid section will be added the Crew Member's Payroll and will also be able to be exported to MYOB.

Whatever is calculated in the Charge Section will be added to the corresponding Invoice for this Shift.

If you wish to charge for Items on an Invoice WITHOUT the Items appearing as a Shift, just enter the same time for Time On and Time Off (a zero minute Shift). This will remove any trace of the Shift from the Invoice, but the Item, as named in the Add Extra text box will appear on the invoice with the correct charged amount.

*For example: You could have a Tax invoice that just displayed Items such as Hammer – \$20.00, 4 Screwdriver – \$5.00 each – \$20 etc. without any details of a Shift (Start Time – End Time etc.) appearing on the Tax Invoice.*



# CREW PAGE

CNB > Crew A / DM / M

This is where all your crew records are kept. Existing crew can be searched by selecting their name from the drop down list where it says “Crew Name” or by entering their mobile numbers. All names are shown in alphabetical order starting from the first name.

*TIP: You can click on “—Select a Name—” and start typing the first few letters of the crew, which will take you to that section of the names for a quick access. Or a search by name can also be performed by typing a key word (or letters) in the text box next to “Crew Name.”*

*TIP: if you remember only a few numbers of a mobile number of crew, you can enter it in the “Mobile Number” field and click “Go”. It will bring up all the crew members that have the combination of the short number you entered.*



**“EYE”:** Crew profiles can be viewed or edited by clicking “eye” icon next to each crew.

**MESSAGE:** clicking “MESSAGE” opens “Send an SMS” page with this particular crew selected ready to be sent, this is useful for quick messaging.

**DISABLE BUTTON:** Clicking Disable Crew Button, when confirmed, disables this entry. It doesn’t delete it.

**View Disabled Crew:** This link opens a new window of crew list showing only disabled crew, where crew profiles can be viewed, edited and if needed, restored. To delete crew records completely from the system see “Disable and Delete Crew” under Crew Page.

## Add a New Crew

Click this link to open up a new profile page and start filling the form with crew information. First and last name, mobile number and at least one skill must be selected in order add this crew to your crew list.

**Rank:** The Personnel Manager staff rostering system allows you to rank your staff, numerically for the purposes of prioritising them in order, or assigning numbers to particular ‘types’ of staff for your own internal reference. Simply open the Crew Page (Admin/Duty Manager/Manager Login) then put a number in the text box to the left of each Crew Member’s entry under the title Rank. Remember to scroll down to the bottom of the page and press “Add/Edit Crew”. It is possible to assign the same

ranking to multiple staff for your own reference. For example, you could give everyone that has a car a ranking of 20. The database will display all Crew Lists in the Shift Edit Page and the various SMS pages in order of the assigned ranking. In this way you can offer staff work in order of ranking. The MultiSMS system will use the ranking when prioritising which staff to confirm for shifts. If rankings are not saved (which means 0), the MultiSMS sequence will display staff in alphabetical order.

**Business Association:** Determines which "Business" this staff works under. All shifts are entered under one "Business" and crew names DO NOT appear if they are not saved under that "Business". Please note that any crew can be saved under multiple businesses.

**Primary Business:** If a crew needs to be entered under multiple Businesses, this field determines the primary business. This is used with rates "Public Holiday (full timers)" calculations.

**Client Association:** If a crew member only works for certain clients, they can be added to the right side of the table, otherwise If left blank then the crew member will be available across all clients.

**Personal Details:** All personal details name, address, DOB... can be entered here. Also a profile picture can be added by clicking "Choose File" select it from the computer and scrolling to the bottom of the page and clicking "Add/Edit Crew"

**Shift Messages:** All outgoing SMS messages to this crew can also be sent in email format providing an email address has been entered in the Personal Details section. Or SMS option can be turned off by unticking the box for it.

**Additional Information:** Any additional information that needs to be followed up or tracked can be created in Global Settings which will appear in this field on each crew profiles. For example once "Uniform" tick box is created in the Global Settings it can be ticked each time a crew member is given a uniform. For customising "Crew Additional Information" go to:

[AUB > Global Settings > Crew Additional Information Fields](#) **A**

**Personal Notes:** Any notes regarding Crew can be entered here.

**Personal Files:** Any personal files (.jpg, .pdf...) can be uploaded to crew pages and viewed here. (Copies of certificates, tickets, pictures...)

**Double Booking Warnings:** Ticking this box will NOT show "Double Booking Warnings" for this crew, if booked on two clashing shifts.

**Assigned Member Categories:** All crew must be assigned under at least one category which will determine the pay rate.

**Crew Groups:** Crew can be added or taken out of crew groups. Please see “Crew Groups” for more information.

**Available Member Skills:** These are the “activities” that are created under “Activities” tab. Crew members MUST be assigned activities in this field in order for their names to appear in the “Crew” list of the shift with corresponding activity.

**Ticketed Member Skills:** If the crew is assigned a ticketed skill (for more info see ticketed activity), ticket number and the expiry date can be entered here. PM shows warnings on top of the “Shifts” page if any crew is confirmed on an Activity, which requires a ticket and that this information is missing or ticket is expired.

**Bank Details, Superannuation Details:** Crew Bank and Super details can be entered here.

**Emergency Details:** Emergency contact details in case of any emergency.

### **Display Crew in order of Hrs Worked**

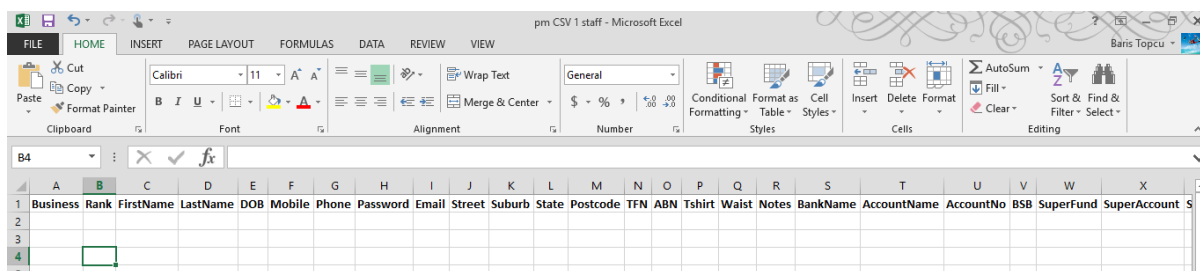
On the Crew Page (Admin Login) there is the feature “Display in order of Hrs Worked”. To use this feature it is important to have View All Company Details Details: OFF, it must be done for each business individually. When the box is ticked, a date from and date to calendar appear, making it possible to enter a date range and press GO in order to view your Crew in order of hours worked. A list will be displayed of only the Crew Members that have worked in that time period, the amount of hours each one has performed, from the most amount of hours through to the least.

This new list will show a new Ranking for each Crew Member corresponding to the amount of hours they have worked in the chosen time period. The Crew Member that has performed the most hours will have a new ‘ranking’ of 1 and the list will assign a 2 for the Crew Member that has performed the second most hours, and so on, numerically for the whole list. It will also display their old ‘ranking’ as well. The system will allow you to save the new rankings by pressing the Save Ranks button at the bottom of the page. Any Crew Members that did not work in the time period searched, and whose previous ranking conflicted with a new ranking, will now be ranked one rank lower than the lowest ranked member of the search.

*For example: If you searched crew that have worked in the last fortnight, and your list displayed 20 Crew Members, in order of the hours they have worked, from highest to lowest, and you saved these rankings, you would have a ranking order of this ‘active crew’ list from 1 – 20. Any crew that had a ranking between 1 and 20 already, but did not work in the previous fortnight will now have a rank of 21.*

### **Import from CSV**

Instead of creating each crew profiles one by one they can be imported using CSV (Comma Separated Values) files. Click on “Import From CSV” and follow the instructions. To start from scratch;



- Create an Excel Spreadsheet and enter the fields in the header row as outlined in the instructions,
- Fill out crew information as much as possible (Please note that “FirstName”, “LastName” and “Mobile” fields MUST be entered),
- Please note that “Business” must be entered exactly as one of the Businesses that was created within the PM. (See “Businesses” for more info)
- Once done save the spreadsheet as .csv,
- On “Import From CSV” page scroll down to the bottom and click “Choose File”, select the .csv file that’s been created and click “Upload CSV”,
- Choose which entries to import, then press “Import”.
- Please note that any existing entry will be overwritten on each import.

## MYOB Card ID

MYOB Card enables integration with the Mind Your Own Business Payroll software. Crew will be identified in the MYOB by their MYOB Card ID. (See “MYOB Export” under “Payroll” for more info)

*Tip: As the MYOB Card ID field is located next to Crew Mobile Number field, it is easy to copy part or all of the mobile number and use this as the MYOB Card ID.*

## Disable and Delete Crew

**CNB > Crew Page>Disable Crew>Crew Page>View Disabled Crew>Delete Crew A / DM / M**

Firstly you must disable the crew member in the crew page by pressing the little anti-smiley face on the right of the screen associated with that crew member to delete a crew record.

Once disabled, you have to click the link “View Disabled Crew” top right of the Crew Page, search for crew then delete by pressing the X. It’s impossible to resurrect mobile numbers as they are the unique identifier, so it is recommended not to delete crew unless absolutely necessary.

To re-enable disabled crew, go to “View Disabled Crew” and click the smiley face to the right of the screen associated with the crew member.

# CREW GROUPS

[CNB](#) > [Crew Groups](#) [A](#) / [DM](#) / [M](#)

The Crew Groups feature is located as a link in the Central Navigation Bar (CNB). It allows you to create different types of groups for different types of clients.

*For Example: A labour hire company may have staff for two different sets of Clients. One set of Clients maybe very corporate and another set of Clients may not be. It may be that certain types of Crew Members would be inappropriate for these Clients. On the Crew groups Page, you would be able to create two groups, Corporate and Non-Corporate and assign the correct Crew Members and Clients to these groups.*

## Creating a New Group

- Scroll to the bottom of the page and click “Add New Group”.
- Once the page is refreshed enter the “Crew Group Name”.
- Select the clients and crew whom need to be associated in this group.
- Then press “Save Changes”.

Now in Edit Page (or Job Sheet Page) of any of these clients’ shifts, crew names who are selected in this group will appear in blue, designating that they are preferred crew. Crew names which are not associated with this particular client will appear in black as this is the default colour. Also Crew who have made themselves unavailable will appear red. For more info see “Unavailability”.

*Tip: If only the “associated” crew names were needed to appear on each client’s shift on Job Sheet / Edit Page then “Obey Crew Groups functionality” option in Global Settings can be used by selecting “Yes”. Option “No” will show all crew names but still highlight the ones (in blue) that are associated (assigned) with corresponding client.*

## Deleting or Undeleting a Group

- Tick the box “Tick to delete this group”
- Press “Save Changes”
- To recall deleted records press “Show Deleted”. Crew groups then can be undeleted.

Buttons “Order by Name” and “Order by Rank” sorts all crew in all lists in this page by either their name alphabetically or by their ranks respectively.

# SEARCH CREW

[CNB](#) > [Search Crew](#) [A](#) / [DM](#) / [M](#)

By pressing the “Search Crew” feature in the Navigation Bar, a new window opens up. In this window you can search all the Crew Members in your system by business, date,

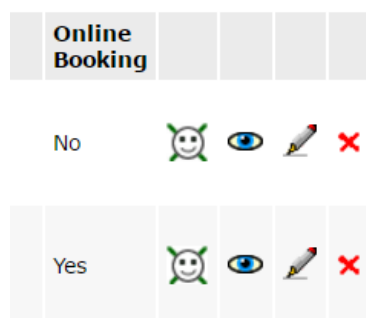
time and four activities. So if you need certain crew with a certain skill (activity) for a certain time slot, you could enter the time and date you require the person and then you could select up to four different Activities, to narrow down your search as well. It is possible to put Activities in the system for your own personal reference, such as Vehicle (to see all crew who own a car).

# CLIENTS

CNB > Clients A / DM / M

A Client is the entity on whose behalf all the work is being conducted. In Ops Home, a Client must be selected in order to create a job sheet. For Labour Hire companies the clients of the company can be listed here or some businesses may prefer to enter their account managers or supervisors as clients. It is possible to change the word Client to another word in Global Settings.

Client records can be search by entering first few letters of the name then selecting from the list that appears. Once selected click “Search” to bring up the records. Search by “Postcode” can also be performed on this page.



**“Anti-smiley face” button** disables the client records but keeps them stored in the data base.

**Eye icon** opens client’s records

**Pencil icon** opens client’s records in edit mode. (Admin user only)

**Cross (X)** deletes the client records permanently.

## Adding a new client

On the Client Page, you can Add a New Client but in order to do this, you must have “View All Company Details” (Superuser mode) switched to ON at the top right of the screen in Admin Login. Once you have created a Client, you can assign all their details, give them booking/edit delete permissions, assign certain Crew Members that can work for those clients. Clients also have the ability to Login to the Personnel Manager with their own Access where they can View Upcoming Shifts, Make Bookings (optional).

**Click “Add a New Client Record”:** Fill out the client details as desired.

**Short Name:** Short name is the name that will appear in all outgoing SMS’s (or email) sent to crew pointing out who the client is for that specific shift. This is also the “username” for clients when they log in online to make bookings to view them. See “Client Log in” for more information.

*TIP: If no “password” is entered, PM assigns the “Short Name” as the password as well when record is saved.*

**Enable Online Client Booking:** When enabled this client will be able to make bookings online. If not enabled, client will still be able to log in to “Client’s Page” but “Make a Booking” button will not appear (See “Client Log in” for more information).

**Default Instructions, Client Payment Terms for Invoices:** Each time an invoice is sent to clients PM includes a default message which looks like the following:

*If you have any questions regarding this invoice, email [ACCOUNTS\_EMAIL] or phone [BUSINESS\_PHONE].*

*[PERCENTAGE\_INTEREST]% interest (per annum) will be charged on overdue Invoices [GRACE\_PERIOD] days after receipt.*

*All invoices are payable within [PAYMENT\_TERMS\_X\_DAYS] Days - You have 24 hours from the receipt of this invoice to query any times.*

This message would apply to all invoices sent out automatically (Editable in Global Settings). [AUB > Global Settings > Email Messages](#) **A**

If any client’s invoices need to have a different message than the default one it can be entered in these boxes.

**Crew Groups:** Clients can be assigned to “Crew Groups” using this table. See “Crew Groups” for more info.

**Additional Information:** For more info please see “Client additional information fields” in Global Settings.

**Associated Discount:** Associated Discount allows discounts stored in the Discounts Page to be associated permanently with a particular Client.

**“Add/ Edit Button”:** Saves any changes that’s made on the clients page.

**Accounts Names and Email Addresses:** This is where all client contacts are organised. They can be added as new contacts, deleted or added in the invoice loop. To add any contact in the invoice loop click the “Envelope icon with red X” on it. Any contact that has a “Green Envelope with check sign” would be in the invoice loop, which means their names will automatically be selected by PM before sending the invoice (See Sending Invoices under “Ops Home Page” for more info).

**Add Client Booking Emails:** Using this link new contact persons can be added to client records. Contact types are “Accounts” (usually to send invoices), booking person (booking person details which will appear on the “Online Booking Form” as one of the selectable booking persons) or Admin CC. Any client contact can also be selected to be in the invoice loop by ticking the box “Include this person in the Invoice

Loop”, so then these contacts will be automatically chosen when invoices are being sent to this client.

**Client Notes:** Any notes that can be entered here regarding clients. Or it can be used as a log (For example: -sent invoice on xx/xx/xx –sent statement on xx/xx/xx – New account manager “John Smith”, -still owe \$xxx on xx/xx/xx...)

**Associated Onsite Contacts:** When bookings are made online PM asks to fill in the details of an onsite contact. All onsite contacts that are entered for each client are stored and can be edited in this section of Client Page.

**Edit Custom Clients Charge Rates:** When clicked, a list of all activities appears at the bottom of the Client Page. All rates belonging to each activity appears blank, which indicates that currently default rates are being applied. If any client is needed to be charged differently than the default rates, they can be entered here.

## VENUES (Google Maps)

[CNB](#) > [Venues](#) [A](#) / [DM](#) / [M](#)

A Venue is the location that the shift is to take place in. Anytime a venue is entered into the database, it is stored for future reference and can be found in the Venues Page.

Staff can view their Shift Meeting Places on a Google Map on their Crew Login Page and from their internet calendar (such as Outlook Calendar) (See “iCAL under “Crew Login Page” for more info).

**VSI Due:** VSI in Venue Details stands for Venue Safety Inspection. You can set a date for this inspection and when a job is booked at that venue after the date of the inspection a warning will appear on the Shifts Page. [CNB](#) > [Venues](#) > [Edit Venue](#) > [VSI Due](#) [A](#) / [DM](#) / [M](#)

**Eye Icon:** Views the venue details in a new window.

**Pencil Icon:** Opens the Venue Edit Page.

### Add a New Venue / Venue Edit Page

Name, address, postcode can be entered here, as well as Venue phone number, website address etc....

**Notes:** Important venue notes are saved in this text box which also appears on SMS Confirmations (or emails) sent to crew who are booked to work at this venue. For example “Corporate venue, dress appropriately”

**Private for Client:** When selected, this Venue will not appear in the list of possible venues that clients can select from in the Client Booking Page. It is useful for private residences or one-off events. To enter a client name start typing first few letters then select it from the drop down list of clients that appears.

**Delete:** if ticked and saved this venue would be deleted from the system.

**Meeting Places:** A specific meeting place for this venue. Each time these are entered by clicking the (+) icon they are stored in the system. It is possible for the one Venue to have several Meeting Points. When a venue is selected in a shift or shifts, a list of meeting places that belong to this venue will be loaded to be selected under the Meeting Places in the shifts edit page.

*For example: ABC Hotel would be saved as a venue with address details like 123 Halifax St., Sydney CBD. And then the meeting places would be entered as “Meet at the front”, “Loading Dock”, “Call on Arrival”. There is no need to enter the street address in the meeting points as it’s will already be entered in the venue details.*

The Meeting Place of any Venue can have a Google Map attached that can be accessed by staff in their Crew Page and in their Internet Calendar.

Press the “map” icon next to a meeting place, a map will appear to allow you to drop the pin on the right location then close the window to go back to the venue page.

**Set Marker To:** Press this drop down list to select and jump to another location, that’s entered in the venue details prior.

**Show Map:** Please note that crew will not be able to see the map if “Show Map” is unticked located next to each Meeting Place in Venue edit page.

**Delete?:** Any meeting point or Rooms can be deleted by ticking “Deleted?” box and saving the page.

**Rooms:** Rooms is an alternative location that can be saved under each venue. It does not necessarily have to be a room, it could be for example “Main Foyer”. By default Rooms does not appear in SMS Confirmation messages sent to crew, but they can be seen by crew in their crew pages.

**Files:** Any documents related to this venue can be uploaded and stored in each venue’s page.

### **Entering a new venue in “Auto Booking Form”, “Shift Edit Page” or “Job Sheet Page”**

Venues can also be entered by typing a name in the “Venues” boxes in the “Shift Edit Page” or “Job Sheet Page” and pressing “Tab” on keyboard (or clicking anywhere). When a venue is entered for the first time, a new window pops open prompting you to ‘Create’ this new Venue. Once you click “Yes”, enter the details of the Venue including the address and postcode. To add a Meeting Place for this Venue, click the “Map” icon next to Meeting Place. Then click “Add New”. The Google Map will open and the pin which should be at the correct location according to the address. Enter the new Meeting Place Name, and click “Add” and close the map window. This information will go into the SMS message for staff. If the pin is in the wrong location, click on it and drag it to the correct location, then SAVE. [CNB > Job sheet/Shift Edit Page > Meeting Place Map Icon A / DM / M](#)

### **Allow Shift Map Checking:**

[AUB > Global Settings > Software Configuration - Allow Shift Map Checking A](#)

It is also possible to access the Google Maps for the Meeting Place on the Shifts Page. There is an option in Global Settings, which says “Allow Shift Map Checking”.

When YES is selected, the Shifts Page will display a Red Map Icon to the right of each Venue. [CNB > Shifts > Map Icon A / DM / M](#) Click on this Icon to open the Google Map for the Meeting Place for this Shift. If the pin is in the correct location, select Verification: This Map is ACCURATE at the bottom of the map and press SAVE. You can move the pin to the correct location by clicking and dragging it.



Once you verify the Map, the Map Icon on the Shifts Page will turn to Green and the Map will appear on the Crew Member's Page and in the link on their Internet Calendar entries.



To the right of the Map Icon on the Shifts Page is an Info Icon for the Venue. Click on this “i” icon to edit the details of a venue. [CNB > Shifts > Info Icon A / DM / M](#)

## DELETED SHIFTS

[CNB](#) > [Deleted Shifts](#) [A](#) / [DM](#) / [M](#)

To delete shifts, select them in the Shifts Page, then scroll down to the bottom of the Shifts Page and click on Select an Action, then Delete Shifts. A window will pop up prompting 'Are you sure you want to delete these records? Yes or Cancel'. In the Central Navigation Bar of the Personnel Manager Deleted Shifts tab will allow to view deleted shifts. By opening this page you can access all deleted shifts and restore them to the Shifts Page if necessary.

# RATES PAGE

CNB > Rates **A**

The screenshot shows the 'Rates' page in a web application. At the top, there are navigation tabs: 'Businesses | Payroll | Timesheets | Invoices | Client Booking Block | Global Settings'. Below this is a 'personnel manager' header with a logo. A breadcrumb trail reads 'Home > Shifts > Candidate Groups > Search Candidate > Clients > Various > Deleted Shifts > Rates > Categories > Activities > Tools'. A sub-breadcrumb trail reads 'Extras > Discounts > Incompatible Client > Candidate > Leave > Unavailability > On-Contacts > Shift History > Location Map > Message (current credit: 2)'. Below the breadcrumbs, there are buttons for 'Available Businesses: My Company, Brisbane Operations' and a 'Login > Go Home > Rates' link. The main section is titled 'Rates' and contains a table with columns: Rate Name, Priority, Type, Multiplier, Paid, Bonus, Charge, Day of Week, Start Time, End Time, Dates, Filter Type, Filter Hours, Filter Start, Persistent Rate, Group, and Auto Booking. Three rows are visible: 'Local' (Fixed, 135, 0, 160), 'Specialists' (Variable, 50, 5, 80), and 'Standard' (Variable, 38.5, 0, 80). Each row has an 'Add/Edit Dates & Graph Colour' button. At the bottom, there are links for 'Save Changes', 'Add New Rate', and 'Show Deleted'.

Rates are assigned when adding or editing an activity in the Rates Page. Pay Rates and Charged Rates can be entered at this point. Pay Rates are the rates of pay your staff will be paid for conducting a certain activity. The rate entered here will be generic for that activity, although it is possible to edit the pay rates of individual staff members for each Activity in their Crew member Details Page. Charged Rates are the rates that will appear on the Invoice as the rates that will be charged to the Clients. Once again these rates can be individually edited for each Client.

## Adding a New Rate

CNB > Rates > Add New Rate **A**

Click “Add New Rate” button, a new line of options will appear. Enter a name for the new rate.

**Priority:** Pay/Charge rates can be entered on either “Rates” or “Categories” pages and the amounts under “Rates” are displayed on Invoices/Payroll by default. Priority allows the users to prioritise which rates should be applied first and overrides default rates. The higher the number the higher the priority.

The Rates Page when used in conjunction with the Categories Page allows you to create rates of pay for your Crew Members to be used in the calculations done on the Payroll Page (AUB). Crew Members can be paid by:

### Type:

**Fixed Rate:** Fixed across all categories.

**Variable Rates:** Customized for each Category/Activity – different rates can be applied to different times of the day/night

**Multiple Rates:** Multiplies by rates with higher priority (rates that appear above the multiple rate) – Penalty Rates

**Multiplier:** If there is a rate difference on special days such as Sundays or Public Holidays, for which a multiplied amount needs to be paid/charged, then this Type of

rate should be selected and a 'multiplier' number entered. For example if all rates are charged/paid double time on Sundays, 1 must be selected as the multiplier, which then will be added to the normal rates and in total it will make it double time.

**Paid:** Rate paid to crew

**Bonus:** Bonus paid to crew

**Charge:** Rate that the clients are charged

**Day of Week:** Any week day that this rate should be applied to (or not applied to)

**Start and End Times:** Time period that the rate is applied

**Dates:** Dates that the rate is applied to (i.e.: Public Holidays)

**Filter Type, Filter Hours, and Filter Start:** Depends on the Filter Type an amount can be entered in the "Filter Hours", and a "Filter Start" day of the week can be selected in the drop down list, which essentially applies a desired filter to any rates.

For example if a crew member works more than 12 hrs and needs to be paid/charged a higher rate after that, then filter type should be selected "per shift" and filter hours should be entered as 12 after filling out the desired pay/bonus/charge sections of the rate.

Overtime:

No Break After: After inputted hours worked, OT is paid until break is taken or shift ends

Per Shift: OT kicks in after inputted hours

Weekly: OT kicks in after inputted hours

Fortnightly: OT kicks in after inputted hours

Monthly: OT kicks in after inputted hours

Public Holiday (full timers): If a full timer works on a public holiday

Apply as a Zero Rate: Sets a rate to zero after inputted hours

**Persistent Rate:** Persistent Rate will override any other subsequent rate changes.

Example: Rate 1 is set to pay \$30 p/hr between 0800am and 2000pm and Rate 2 is set to pay \$35 p/hr between 2000pm and 0800am. If Rate 2 is set as a Persistent Rate, a Shift that starts at 0400am and ends at 1000am will pay Rate 2 – \$35 p/hr – for the duration and will not revert back to Rate 1 – \$30 p/hr – at 0800am as would happen if Persistent Rate were not set for Rate 2.

**Group:** To prevent two separate bonus rates (Sunday rate and NYD rate (if on a Sunday)) to affect the daily rates at the same time all bonus rates must be grouped by giving them a name under “Group” column on Rates page and then selecting the same name for all bonus rates.

**Example:** Company A's NYE / NYD pay structure is as follows:

*Saturday 31/12/16 – 00:00-20:00 (Saturday rates 0.25 x General rate– Every Saturday)*

*Saturday 31/12/16 – 20:00-24:00 (Public holiday rates 1 x General rate, double time)*

*Sunday 01/01/17 – 00:00-24:00 (Public holiday rates 1 x General rate, double time)*

*There are 3 different rates that needs to be entered here;*

## 1. Saturday rates

Default Saturday rate can be created as seen on the screen shot below. Default behaviour of "Priority" is (if Multiple selected) to multiply by any rates with a higher priority. Multiplier is entered as 0.25x. Day of the Week is selected as Saturday.

### Rates

**Variable** - Varies for each Activity/Category.  
**Multiple** - Multiplies by rates with higher priority (rates that appear above the multiple rate)  
**Fixed** - Fixed across all categories.

Rate Name	Priority	Type	Multiplier	Paid	Bonus	Charge	Day of Week	Start Time	End Time	Dates	Filter Type	Filter Hours	Filter Days
Night Rate	1	Variable		30	0	60		20:00	08:00	Add/Edit Dates & Graph Colour			Monday
Day Rate	2	Variable		20	0	40				Add/Edit Dates & Graph Colour			Monday
Saturday	10	Multiple	0.25 x				Saturday			Add/Edit Dates & Graph Colour			Monday

Day Rate  
Night Rate

[Edit Multiplier](#)

Job Sheet Page now shows Saturdays as below:

**\*\*\*Please ensure to select all shifts on Shifts Page and click “Update Shift Rates” to apply the changes first.\*\*\***

[illegible]

## 2. NYE rate

Create another rate and name it “NYE Double”. Choose the type of rate as “Multiple”. Once it has been created click “Add/Edit Dates” to enter 31/12/16.

[Login](#) > [Ops Home](#) > [Rates](#)

Graph Colour:

Graph Label:

Start Date	End Date	Businesses	Deleted?
31/12/16	31/12/16	<input checked="" type="checkbox"/> Sydney Ops <input checked="" type="checkbox"/> Brisbane Ops <input checked="" type="checkbox"/> IWD	<input type="checkbox"/>

[Save Changes](#) [Add New Date](#)

Personnel Manager, street town NSW 2000 Australia

“NYE Double” rate should now look like below. Multiplier is set “1x”. Start and end times are 20:00 – 00:00.

Rates

**Variable** - Varies for each Activity/Category.  
**Multiple** - Multiplies by rates with higher priority (rates that appear above the multiple rate)  
**Fixed** - Fixed across all categories.

Rate Name	Priority	Type	Multiplier	Paid	Bonus	Charge	Day of Week	Start Time	End Time	Dates	Filter Type	Filter Hours	Filter
Night Rate	1	Variable		30	0	60		20:00	08:00	<a href="#">Add/Edit Dates &amp; Graph Colour</a>			Mond
Day Rate	2	Variable		20	0	40				<a href="#">Add/Edit Dates &amp; Graph Colour</a>			Mond
NYE Double	5	Multiple	1 x	<input checked="" type="checkbox"/> Multiply				20:00	00:00	31/12/16 - 31/12/16 Sydney Ops Brisbane Ops IWD			Mond
			<a href="#">Edit Multiplier</a>							<a href="#">Add/Edit Dates &amp; Graph Colour</a>			
Saturday	10	Multiple	0.25 x	<input checked="" type="checkbox"/> Multiply			Saturday			<a href="#">Add/Edit Dates &amp; Graph Colour</a>			Mond
			<a href="#">Edit Multiplier</a>							<a href="#">Add/Edit Dates &amp; Graph Colour</a>			

After saving the rates page new changes can be observed on Job Sheet Page as seen below.

**\*\*\*Please ensure to select all shifts on Shifts Page and click “Update Shift Rates” to apply the changes first.\*\*\***

	No.	Copy	Lock	Date	Time On	Time Off	Hrs	Rate	Paid	Charge	Pay Date	BTT	Staff Name
<input type="checkbox"/>	830			Sat 31-12-16	14:00	00:00	<a href="#">Add</a> 10.00	<input type="text"/> - Hourly				0	
					14:00	20:00	6.00	Saturday (0.25 x Day Rate)	5.00	10.00			
					14:00	20:00	6.00	Day Rate	20.00	40.00			
					20:00	00:00	4.00	NYE Double (1 x Night Rate)	30.00	60.00			
					20:00	00:00	4.00	Night Rate	30.00	60.00			
								<a href="#">Add Extra</a>					

Remember, to prevent both “Saturday” rate and “NYE Double” rate to affect the night rate at the same time all bonus rates must be grouped by giving it a name under “Group” column on Rates page and then selecting the same name for all bonus rates.

### 3. NYD rate

Create a new rate named “NYD Double” and add the date 01/01/17 as instructed above creating “NYE Double” rate. Priority should be a higher number than “Day Rate” and “Night Rate”, so the “Multiplier” can associate with Day and Night rates. Multiplier should be set to 1x again as it will be charged / paid double time.

**Rates**

**Variable** - Varies for each Activity/Category.  
**Multiple** - Multiplies by rates with higher priority (rates that appear above the multiple rate)  
**Fixed** - Fixed across all categories.

Rate Name	Priority	Type	Multiplier	Paid	Bonus	Charge	Day of Week	Start Time	End Time	Dates	Filter Type	F
Night Rate	1	Variable		30	0	60		20:00	08:00	Add/Edit Dates & Graph Colour		
Day Rate	2	Variable		20	0	40				Add/Edit Dates & Graph Colour		
NVD Double	5	Multiple	1 x							01/01/17 - 01/01/17 Sydney Ops Brisbane Ops IWD		
			Day Rate Night Rate									
			Edit Multiplier							Add/Edit Dates & Graph Colour		
NVE Double	5	Multiple	1 x					20:00	00:00	31/12/16 - 31/12/16 Sydney Ops Brisbane Ops IWD		
			Night Rate									
			Edit Multiplier							Add/Edit Dates & Graph Colour		
Saturday	10	Multiple	0.25 x				Saturday			Add/Edit Dates & Graph Colour		
			Day Rate Night Rate									
			Edit Multiplier									
Sunday	10	Multiple	0.5 x				Sunday			Add/Edit Dates & Graph Colour		
			Day Rate Night Rate									
			Edit Multiplier									

Save Changes Add New Rate Show Deleted

## Day Rate Behaviour, Day Rate Hours, Day Rate OT Hours

Day Rates must be selected in Global Settings.

**AUB > Global Settings > Day Rate, Holidays, and Overtime Configuration > Enable the Day Rates: YES A**

On the Rates Page, Day Rates can be selected from drop down as Normal, Fixed Hours or Disable.

If Fixed Hours selected, then 2 new boxes appear: Day Rate Hours and Day Rate OT Hours.

*Example: Day Rate Hours are saved as 10 hours. Day Rate OT Hours are saved as 40 Hours.*

In a Job sheet/Shift Edit Page rates can be changed from hourly (default) to Day Rates. A 10 hour day rate will be applied automatically to all day rates as this is the setting in the Rates Page.

In Payroll/Timesheets, Day Rate OT hours will kick in after 40 hours has been worked in the Pay Period.

*Example: Rates Page OT Rates for Mon – Fri with 3 different rates and Sat/Sun penalty Rates*

*In the below example:*

*Staff are Paid \$25 p/hr and Charged at \$35 p/hr between 0700am and 1900pm*

*Staff are Paid \$30 p/hr and Charged at \$60 p/hr between 1900pm and 2400pm*

*Staff are Paid \$35 p/hr and Charged at \$70 p/hr between 0000am and 0700am*

*Staff are Paid \$30 p/hr and Charged at \$50 p/hr on Saturdays*

*Staff are Paid \$35 p/hr and Charged at \$70 p/hr on Sundays*

*Staff are Paid \$60 p/hr and Charged at \$100 p/hr on a Public Holiday*

[Login](#) > [Ops Home](#) > Rates

#### Rates

**Variable** - Varies for each Activity/Category.

**Multiple** - Multiplies by rates with higher priority (rates that appear above the multiple rate)

**Fixed** - Fixed across all categories.

Rate Name	Priority	Type	Multiplier	Paid	Bonus	Charge	Day of Week	Start Time	End Time	Dates	Filter Type	Filter Hours
Sat	1	Variable		30	0.50	50	Saturday	07:00	24:00	Add/Edit Dates & Graph Colour		
Sun	2	Variable		35	1.00	70	Sunday			Add/Edit Dates & Graph Colour		
Pub Hol	3	Variable		60	0	100				13/06/16 - 13/06/16		
Add/Edit Dates & Graph Colour												
7am	4	Variable		25	0	55		07:00	19:00	Add/Edit Dates & Graph Colour		
7pm	5	Variable		30	0	60		19:00	24:00	Add/Edit Dates & Graph Colour		
12am	6	Variable		35	0	70		24:00	07:00	Add/Edit Dates & Graph Colour		
Add/Edit Dates & Graph Colour												
Save Changes Add New Rate Show Deleted												

[Click here to edit old rates](#)

Filter Hours	Filter Start	Persistent Rate	Group	Auto Booking Email Warning	Delete
	Monday	- after 0 hour(s)	Standard	Shown if rate is active in booking	<input type="checkbox"/>
	Monday	- after 0 hour(s)	Standard	Shown if rate is active in booking	<input type="checkbox"/>
	Monday	- after 0 hour(s)		Shown if rate is active in booking	<input type="checkbox"/>
	Monday	- after 0 hour(s)	Standard	Shown if rate is active in booking	<input type="checkbox"/>
	Monday	- after 0 hour(s)	Standard	Shown if rate is active in booking	<input type="checkbox"/>
	Monday	- after 0 hour(s)	Standard	Shown if rate is active in booking	<input type="checkbox"/>

**Auto Booking Email Warning:** In case clients need to be warned automatically when an online booking form, which for example falls on a Public Holiday is sent, the warning message, which says something like "This booking occurs on a Public Holiday. Please contact the office..." can be entered here.

**Delete:** When ticked and saved deletes the rate. Please note that deleted rates can be viewed and restored by clicking "Show Deleted" at the bottom of the "Rates" page.

# CATEGORIES PAGE

CNB > Categories A

Categories enable you to quickly change a whole range of Rates Paid to Crew members by simply changing the Category of that Crew Member in Crew Profile Page.

For Example: You may have three different rates you pay your staff for the same activity: Trainee, Normal, and Experienced. These would be your “Categories” you can apply and customize a range of rates to each Category. To change a Crew Member’s pay rate from Trainee to Normal, just change the Category in their Crew Member Details Page from Trainee to Normal. In this way all the rates that have been set will be applied in one go.

## Add New Category

To create a new category click “Add New Category”. A new page opens, then enter its name using the tables provided, add Crew Members that you wish to assign to this category (this can also be done in Crew profile pages one by one), Activities that will effected by and Rates that apply to this particular category.

If the Rate assigned to a category is a “Variable Rate”, then you can click “Edit Rates” in the “Categories Page”, and enter all the different rates of pay for all of your different Activities.

**Priority:** Pay/Charge rates can be entered on either “Rates” or “Categories” pages and the amounts under “Rates” are displayed on Invoices/Payroll by default. Priority allows the users to prioritise which rates should be applied first and overrides default rates. The higher the number the higher the priority.

# ACTIVITIES PAGE

CNB > Activities A

All activities (and sub activities) can be edited in this page.

## Adding a New Activity

To add a new activity click “Add New Activity”:

**Name:** Enter a name

**Code:** This is up to six characters in length and can be entered for each activity. These codes can then appear in the SMS messages for staff, both request and confirmation messages, if they are configured that way in Global Settings. The Activity Codes will also appear in the Crew Support pages along with an explanation of the Activity.

For example G (for General Labour) would appear in all SMS messages sent to crew members for shifts with activity “General Labour”.

**Graph Colour:** Choose a colour which will appear on the “View Shifts as Graph” view, which is located on Shifts Page.

**Show Skill in Clients Booking Area:** If you select Show Skill in Clients Booking Area, the Activity will display in the Client Access (Login) as an Activity that they can select when making a booking (optional). Also, by selecting this feature within an Activity, it will display in Crew Login on the Crew Support pages of Staff in a key which lists all the Activity Codes and their corresponding Activities.

**Tick to indicate that this is a licensed (ticketed activity):** If ticked PM adds this activity into Ticketed Member Skills which appears in Crew Profile Pages if the ‘Ticketed Activity’ is assigned to the Crew Member.

### Ticketed Member Skills

Activity	Ticket #	Expires
Truck Driver		
Fork Lift		

It is then possible to add Ticket Number and Ticket Expiry Date by clicking “Edit Details”. If a person is booked on a shift for a ‘Ticketed Activity’, a warning will display on the Shifts Page if the Ticket Number and/or Ticket Expiry Date have not been entered or expired. Therefore it is not possible to accidentally book a person for a job that he/she is not qualified for.

**Tick to indicate that this is a dual text activity:** If this box is selected within an Activity, then not only will the Crew Member receive reminder SMS messages for the job/appointment, but so will the Onsite Contact, provided a correct mobile number is entered for the Onsite Contact. In this way, both the staff and the Onsite Contact will be reminded at 16:00 the day before a job/appointment.

**Tick to Delete:** To delete an activity tick this box and click Save Changes. It will delete the activity keeps the record of it and can be viewed on Activities Page by clicking on “Show Deleted” at the bottom of the page.

**Sub Activities:** Works the same way as activities. This will accord the same pay/charge rates to its parent activity but helps to organise same level or workers with different types of work. For Example “Packer”, “Cleaner”, “Kitchen” sub activities can all be created under “General” activity and each can be assigned to different shifts, which would still be subject to General pay/charge rates.

**Categories:** A pay category must be chosen which will set this activities pay/charge rates.

**Crew/Candidate:** Crew names that can be assigned or taken off from this activity.

*TIP: This action can also be done individually in Crew Profile Page.*

**Minimum Call (hours):** A default minimum call hours can be entered here. If any shifts are entered or amended to have less than this amount of hours for this activity PM will display warnings in Shifts Page and Job Sheet Page that this particular shift belong to.

## Activities Main Page

Once added all activities should appear on “Activities Page” as seen below example. Sub-Activities and Categories which are assigned to each activity are shown under corresponding column.

[Login](#) > [Ops Home](#) > [Activities](#)

Activity Name	Sub-Activities	Categories	Show In Clients Booking Area	Ticketed			
ABC test					<a href="#">Edit Activity</a>	<a href="#">Edit Rates</a>	<a href="#">Duplicate</a>
Audio Operator (AO)		standard	Yes		<a href="#">Edit Activity</a>	<a href="#">Edit Rates</a>	<a href="#">Duplicate</a>
AV Operator (AVO)		standard	Yes		<a href="#">Edit Activity</a>	<a href="#">Edit Rates</a>	<a href="#">Duplicate</a>
Bar Staff (BS)		standard	Yes	Yes	<a href="#">Edit Activity</a>	<a href="#">Edit Rates</a>	<a href="#">Duplicate</a>
Bump Out (BO)		standard			<a href="#">Edit Activity</a>	<a href="#">Edit Rates</a>	<a href="#">Duplicate</a>

**Edit Activity:** All activities can be edited by clicking “Edit Activity”.

**Edit Rates:** Click “Edit Rates” to enter any rates related to this activity. Please note that activities must be assigned to a category first.

**Duplicate:** Duplicate allows users to create a new activity with the same settings/rates as the duplicated activity. When clicked PM asks for a name of the new activity. Enter a name and click OK.

# EVENTS

CNB > Events A / DM / M

Working under Events tab is a whole new way of entering jobs, paying staff and charging customers, which works the same way but slightly different than creating job sheets in Ops Home Page and using Client Auto Booking Online Form. Bookings or job sheets here are known as “Events” and all bookings are displayed by event on the main Events Page rather than by each shift (staff) on Shifts Page. Creating job sheets (events) on this page also gives you quick access to 2 additional components which are called “Equipment” and “Consumables”, which can be added or edited on the go. Using Events Page would be most efficient if each event are entered by your office staff (as opposed to Clients making bookings online every day) and your invoices include a combination of hourly rate for staff, consumable items and equipment hire.

Events main page consists of 3 tabs (Events, Booking, and Quote).

## Events Tab

All events that are created previously are shown here starting with today's events onward. As indicated below events are colour coded by which day of the week they are on.

Meanings of each column labels can be viewed when mouse cursor is hovered on them.

“Cat” for category (See Event Category below).

Cnf: Number of confirmed staff

Bkd: Number of staff booked so far.

Req: Number of staff still required

E: Amount of Equipment required

C: Amount of Consumables required

S: Status of event (See Status under the “Quote” tab).

T: Timesheet Sent is marked with a “T” if checkbox is ticked in Booking tab.

t: MESSAGE Sent is marked with a “t” if checkbox is ticked in Booking tab.

Notes: Anything that’s entered in the “Booking Notes” text box in either Booking or Quote tab appears here.

Using the search bar, events can be narrowed down by client, date or job number or a combination of multiple search filters can be used by entering the data and clicking the

“Search” button. Click “Reset” button to reset the advanced search bar entries and bring the events view back to today.

**Creating New Event:** Click “New Event” (or press “Booking” tab) to open a small window and enter details. This will create a new booking / Event.

**Business:** Which business the event will be created in (See “Businesses” for more info).

**Client:** Choose a client name from the drop down list.

**Date:** Choose the first day that the job will commence, other dates can be added in the next step.

**Start and Finish times:** Enter start and finish times for this event, this can be changed or more shifts can be added in the next step.

*TIP: Enter 15 then press TAB key to enter 15:00*

**Activity:** Add an activity which can be changed or more activities can be added in the next step.

Press “Create”. Booking details will appear under the “Quote” tab.

*TIP: clicking on “Booking” or “Quote” tabs will also initiate new event window.*

## **Quote Tab**

First line on top with a number, which automatically assigned by PM indicates the event number (also quote and invoice numbers), this number can be edited or a text can be added. Additional to the details that were entered in the previous step, more details can be added here.

**Status:** By default “Confirmed” is selected but if the client needs to approve the quote, then “Quote” can be selected from the drop down list. A third option is Pending Changes, the status of each event is shown in Events tab under the column labelled “S”. (C) for confirmed, (Q) for quote and (P) for Pending Changes. If “Pending Changes” is selected the event details turn red in bold letters in Events tab.

**Venue, Room, Meeting Place:** A venue can be selected in the list that appears after typing the first 3 characters of it, if this will be a new entry then enter the name of the venue and press TAB key on keyboard or click anywhere on the page. A dialog box will appear asking if you would like to create a new entry. (See “Venues” for more info about creating new venues).

**Job Description:** Job Description allows you to add a description to your job sheets which can be displayed on the Shifts Page in conjunction with your Job sheet number.

For Example you could have the Job sheet Number as *Acme XY123* and the Description as *Product Launch*. On the Shifts Page under the job sheet column you will see *Acme XY123/Product Launch* displayed as the Job Number.

This Description can also be exported into MYOB.

You can enter the Description directly into the Ops Home Page in the blank text box under Description then press TAB or inside a job sheet you can enter the Job Number and the Description.

**CNB > Ops Home > Description A / DM / M**

This feature will only be available if it is enabled in Global Settings under Manager Homepage Configuration if Show Inhouse Client Reference Numbers and Use Inhouse Client Reference Numbers are both ticked. **AUB > Global Settings > Manager Homepage Configuration > Show Inhouse Client Reference Numbers and Use Inhouse Client Reference Numbers A**

**Onsite Contact Name:** (See “Onsite Contact Name and Number” under “Job Sheet Page” or “On-Contacts Page” for more info.)

**Event Category:** To help organising all events different categories can be entered here which will appear in Events tab.

**Instructions:** Instructions that will be sent via SMS (or email if configured in Crew Profile Page) to staff that’s booked on the first shift of this event. If the same instructions need to be sent to all staff booked on this event then tick the box “Apply to All This Booking’s Shifts”.

**Booking Notes:** Any notes related to this event can be entered here. These notes can be quickly reviewed under the last column on the right on the Events tab.

**Staff Required:** All staff requirements can be viewed and edited in this part of the page. More staff can be added by clicking “Add Staff”. If “Paid” and “Charge are unfilled default rates for each activity will apply.

**Equipment:** click “Add Equipment” then enter the quantity, which will multiply the amount that’s entered under “Charge”, if desired date and time can be added as well, but they do not affect the charge.

**Consumables:** Another component to add any costs to your invoice. Simply add description of the charge, date (optional), quantity and the charge, which will be multiplied by the quantity.

Make sure to click “Save Information” after making any changes.

## Booking Tab

Once an event has been added and modified in “Quotes” tab, now shifts can be sent out to crew in “Booking” tab. Category and Booking Notes can be edited in this page. **Time sheet sent** can be followed up here with a check box as well as **MESSAGE Sent**.

Right below all the shifts, where crew can be assigned to shifts either by manually entering their names under “Staff Name” or by sending SMS messages, there is a yellow dashboard. Being very similar to “Job Sheet” page, all options and buttons on “yellow dashboard” and “Select an Action” drop down list can be accessed in this page (See “Job Sheet Page / Select an Action or /Yellow Dashboard” for more info).

## TASKS PAGE

[CNB > Tasks](#) **A / DM / M**

Tasks create a new column on the Shifts Page/Job sheets allowing you to refine your Activities. For example you could have the Activity – Performer. The Tasks could be Rehearsal, Dress Rehearsal or Show, etc... Tasks can be anything you like such as Vehicles that you may wish to associate with a Shift. Or you may wish to sub-categorize an Activity further by adding tasks to it. Tasks do not have any effect on rates or activities, it's there just for a quick reference for PM users. [CNB > Shifts > Select Shifts > Edit Icon > Select Task](#) **A / DM / M**

If activated in Global Settings the Tasks Feature will allow you to add an extra column to the Shifts Page and Job sheets called Tasks. [AUB > Global Settings > Software Configuration - Enable Tasks](#) **A**. In the Central Navigation Bar, a link to the Tasks Page will appear. Click on Tasks to open the Tasks Page and press Add New Task. You can now add as many Tasks as you like or edit them. [CNB > Tasks > Add Task](#) **A**

## EXTRAS PAGE

[CNB > Extras](#) **A / DM / M**

As explained in the “Add Extra Feature” in this manual “Extras” allow you to add additional costs or pay allowances to your Shifts such as Petrol Allowance, Mileage, Tools, Per Diems, and calculates the pay rate and charge rate times the quantity entered (For more info please see “Add Extra Feature” under “Job Sheet/Edit Page”).

All “Extras” are stored here and can be viewed or deleted.

# DISCOUNTS

[CNB](#) > [Discounts](#) **A**

This is where various kinds of discounts are created and edited, which then can be applied to invoices. To create a new discount simply enter a name where it says “New Discount Name” then choose the type of discount and the amount / percentage. Make sure click “Save Changes”. There are two types of discounts: “Fixed” and “Percentage”.

**Fixed:** Fixed discount deducts this set amount from any invoice. This amount must be entered with (-) negative sign in front of it to make it a discount, otherwise the amount would be added.

**Percentage:** A percentage amount can be entered also, which will be applied to the total of invoiced amount. This amount must be entered with (-) negative sign in front of it to make it a discount, otherwise the amount would be added.

Once a new “Discount” is created it will appear in the dropdown list of “Discounts” under each client’s profile pages where it says “Clients Default Discount”. Choose one to apply this discount to all “future” job sheets that’s created after saving the client page.

*TIP: This feature is useful if any **default discount** is negotiated with any of the clients that must be applied from one point forward hence discounts are only applied after they are created and assigned to clients. If a discount needs to be applied **one time only** then there are two ways of doing this. 1) Use “Add Extra” feature in the job sheet (See “Add Extra” under “Job Sheets” for more information). 2) Using “Apply Credit Card Surcharge” and tweaking it would give the same results (See “Sending Invoices” under “Ops Home” page for more info).*

# INCOMPATIBLE CLIENT – CREW PAGE

[CNB](#) > [Incompatible Client – Crew](#) **A / DM / M**

In this page you can make certain Crew Members incompatible with certain Clients. This will remove their names from the list of available crew when issuing shifts out for a particular client making it impossible to send certain staff to certain clients.

Enter client name then crew name, add a reason (optional) then click “Add Incompatibility”.



The screenshot shows a web interface for 'Incompatibility Management'. At the top, there is a breadcrumb trail: 'Login > Ops Home > Incompatibility Management'. Below this, the title 'Incompatibility Management' is displayed. The form contains three input fields: 'Client Name:' with a dropdown menu showing '-- Please Select Client --', 'Candidate Name:' with a dropdown menu showing '-- Select Name --', and 'Reason:' with a text input field. To the right of these fields is a button labeled 'Add Incompatibility >>'. The form is enclosed in a light gray border.

Any incompatibility can be deleted by clicking (X) next to each entry.

# LEAVE

CNB > Leave A / DM / M

This page keeps a record of employees with paid leave. Simply enter employee name, date of leave, hourly rate and click "Save". Amount of hours for each day of the leave can be edited in the next page. PM calculates the total automatically and displays the total pay by week in the payroll.

## Add Leave

<b>Business</b>	<input type="text" value="My Company"/>
<b>Candidate</b>	<input type="text" value="Veronica Wilson"/>
<b>*Date From:</b>	<input type="text"/>
<b>*Date Until:</b>	<input type="text"/>
<b>*Hourly Rate</b>	<input type="text"/>
<b>Type</b>	<input type="text"/>
	eg. Sick Leave, Holiday Leave, etc.
<b>Notes:</b>	<input type="text"/>
	<input type="button" value="Save Paid Leave"/>

\* denotes required field

# UNAVAILABILITY

[CNB](#) > [Unavailability](#) [A](#) / [DM](#) / [M](#)

The Unavailability Page in Admin/Duty Manager/Manager Login allows you to enter Unavailability for Crew Members for certain time slots so that they appear with a hash symbol # next to their name in the Crew List for jobs due to occur in that time slot. If a Crew Member is booked for a shift in a time period that conflicts with their Unavailability, then a warning will display on the Shifts Page.

If a Crew Member becomes unavailable for a shift that's been confirmed already it is possible to take crew's name off the shift and make unavailable in one go by pressing the "Make Unavailable" button in the Shifts Edit Page or Job Sheet Page, which will automatically enter that Crew Member's Unavailability in the Unavailability Page. The entry in "Unavailabilities Page" will say "Made unavailable by admin – time/date of entry".

In the Crew Login, Crew Members can enter their own Unavailability as well.

Crew must not be booked on any shifts within that time period to be able to enter an unavailability.

**Unavailability Search:** Enter crew name and/or Date to make a search for unavailabilities.

Any unavailability can be edited or deleted in this page by clicking on the "edit" or "delete" icons next to each entry.

**Add Unavailability:** Select crew name, then start date/time and finish date/time. Weekly Unavailability, when ticked, PM enters an unavailability with the same day(s) and times of the week every week for the next 12 months. Enter a reason then click "Submit Unavailability".

**Admin will confirm Crew Unavailability:** This option in Global Settings allows whether unavailabilities must be approved by admin or not. If "No" selected, crew can simply go on to their crew pages and enter an unavailability in the system. If "Yes" is selected, then each unavailability "request" must be viewed and approved by admin by selecting "approved" in the "Request Status" in the Unavailability Page and saved. If any feedback needs to be sent to crew regarding their request, it can be entered in the "Admin Status Feedback" and click "Submit" after "Email Feedback to Crew" is selected "Yes".

[AUB](#) > [Global Settings](#) > [Admin will confirm Crew Unavailability](#) [A](#)

## ON-CONTACTS

[CNB > On-Contacts](#) [A](#) / [DM](#) / [M](#)

The Onsite Contact is the person that staff will report to from the client company. When an Onsite Contact is entered, the name and mobile number are stored in the system for future reference in the On-Contacts Page and in the individual Client entries. They are also listed in the Client Access. If Dual Text Activity is selected in the Activities/Rates page when adding or editing an Activity, then both the Crew Member AND the Onsite Contact will receive reminder SMS messages (if they have been activated). Deleted on-site contacts cannot be restored.

## SHIFT HISTORY

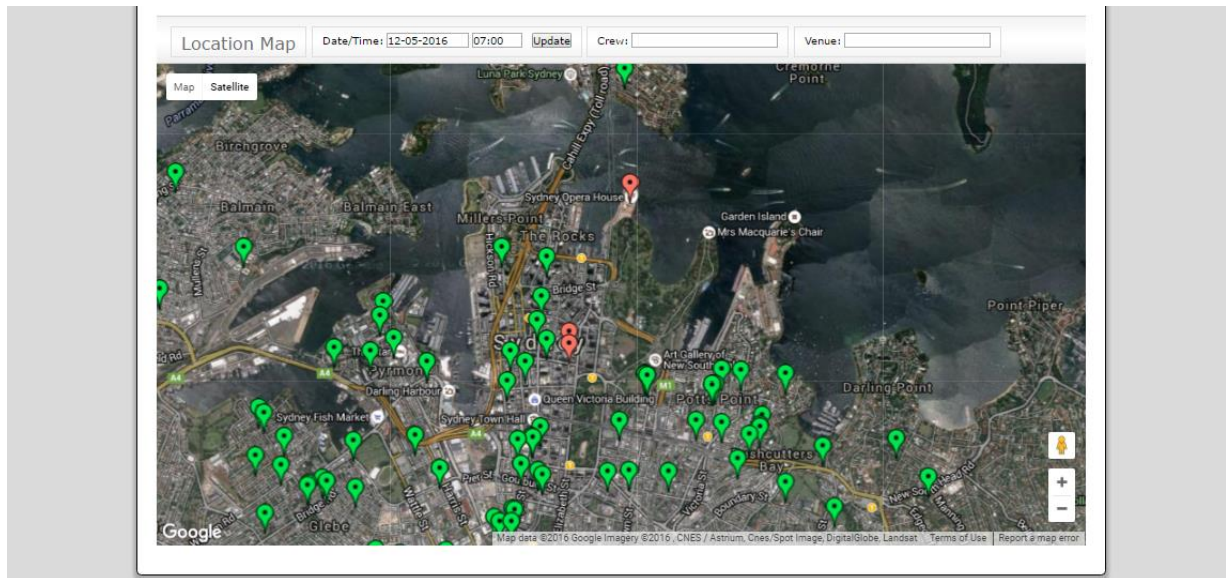
[CNB > Shift History](#) [A](#) / [DM](#) / [M](#)

Shift History page provides a useful log of all shifts that are created in the PM. By entering the shift number any actions or changes that's done to the shift can be displayed from the creation of them. Under "Name" it shows the user name who has done the action, IP address of the device that was online at the time of action, and the date. "Note" column shows what has been done to that shift, whether it's been sent out to crew, or time/date has been changed, locked/unlocked, etc....

Shift History Search can be narrowed down by date.

# LOCATION MAP

CNB > Location Maps A / DM / M



“Location Maps” displays where your staff live and the shifts you have at any given time.

Click “Location Maps” in the Central Navigation Bar to open a Google Map containing your Staff Members (by their address, or if they are working, at their Shift locations). You will see green tags indicating your Staff Members’ home addresses, or if they are currently working on a Shift you will see red tags, indicating the Venue where your staff are working at the time of the search. If you click the tags, more information about the Staff and Shifts will display in a pop-up. You have to enter a date and time located right above the map to see the Shifts and Staff at the time of your search.

You can also search Crew and Venue to exactly pinpoint on the map where any given Staff Member or Shift is. Start typing first few letters of a crew name, venue or any meeting point and select it from the drop down list.

Just like the Google Map website Location Map can be zoomed in and out using the mouse wheel or click+dragged to navigate.

# MESSAGE PAGE

CNB > Message A / DM / M

Message tab has 3 options to choose from, which appears when hovered on “Message” tab: Send an SMS, MESSAGE Logs and Client MESSAGE.

All incoming and outgoing SMS’s (or automated emails if configured in crews’ pages) are logged here. This log can be opened either by clicking on the “Message” or hovering on “Message” then selecting “MESSAGE Logs” which are the same page. The only difference is when clicked on “Message” it opens the log in the same window, and “MESSAGE Logs” opens the log in a new tab of your browser.

## MESSAGE Logs Page

By default Message logs shows all messages, incoming or outgoing, starting from the beginning of the week to current time; latest received/sent message being on top of the page. An “Advanced MESSAGE Search” can be made using the fields provided above the messages.

*TIP: All or some of these fields can be combined while making a message search.*

**No.:** Enter a shift number and click “Go” to see the history of all messages sent or received regarding this specific shift.

**Client Name:** Select a client name to narrow down all messages to one client’s shifts, which are booked under this client only.

**Crew Name:** Select a crew name to see all incoming / outgoing message sent or received by this crew.

**Date From, Date To:** To narrow down the searches by date.

**Mobile Number:** Instead of crew name, a search can be made by crew mobile number. Please note that any number or digits can be entered here. For example a search that only has “89” in all mobile numbers can be made.

**Business:** Search by Business can be done by selecting a Business in the drop down list.

Advanced MESSAGE Search

No.

Client Name:  

-- Please Select Client --

Crew Name:  

-- Select Name --

Date From:  
09-05-16

Date To:

Mobile Number:

Business:  

All Companies

Dates Searched: This week

No.	T	Business	Date	From	To	Crew Name	Message	Status	Sent via
-----	---	----------	------	------	----	-----------	---------	--------	----------

**MESSAGE Log View:** All messages are colour coded as to whether they are incoming or outgoing. Incoming messages are in light blue, outgoing are shown in brown.

**No.:** indicates the shift number that's related to the message.

**T:** Tags are codes that shows the type of that message. Code descriptions are as follows:

B = Basic Send which was not associated with a Job

C = Confirmed SMS

M = Multi SMS

S = Single SMS

L = Linked SMS

Co = Connected SMS

I = Incoming SMS

A = After Hours Reminder

N = Next Day Reminder

OA = Onsite Contact After Hours Reminder

ON = Onsite Contact Next Day Reminder

Lo = Loser Multi Shift Message

**Business:** Shows which business crew is assigned under.

**Date:** Date and time message has been sent / received.

**From, To:** Indicates where the message is coming from or sent to which number.

**Crew Name:** Crew name that sent / received the message

**Message:** The actual message sent / received. Messages are shortened by PM for an easy display. If needed any message can be viewed fully by clicking [More] or shrunk by clicking [Hide]. You will notice (when clicked [More]) that any incoming message from crew are displayed with some of crew details such as date, time, ranking, email address... but the actual message sent by crew appears under the text "SMS Message - - - -".

**Status:** Status of the message can be either "Success" means the message has been successfully sent, "Queued" means it is pending or "Failed" means the server may have problems sending the message.

**Sent Via:** indication whether it's an SMS or Email.

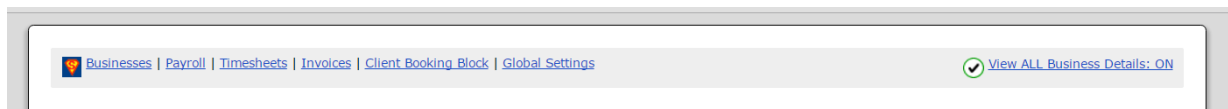
### **Send an SMS**

First option in the drop down list when mouse cursor is hovered on "Message" is "Send an SMS". This option allows users to send quick SMS's to crew. When clicked it opens a new tab in your browser. Type your message in the text box "SMS Message" and find crew name or names (can be sent to multiple crew at once) double click on them or click ">>" to move the names to the right side. Then click "Send".

If the crew that the message needs to be sent is disabled then select "Search Disabled Crew" or leave it "Search Active Crew".

Select the Business that crew is assigned to. A group of crew can be searched (and messaged) by their skills as well. For example if you need to send a common message to all your drivers select "Driver" in the skill list, which will bring up the crew list with only "Driver" skill assigned, select all crew in the list move them to the right by clicking ">>", then send your message.

## AUB (Administrator Utility Bar) Tabs



**CNB** – Central Navigation Bar (located under logo containing links to pages Ops Home|Shifts|Crew|Crew Groups|Search Crew, etc.

**AUB** – Administrator Utility Bar (located at the top left of Admin User containing links to pages Businesses|Payroll|Invoices|Client Booking Block|Global Settings.

## BUSINESSES

[AUB > Businesses](#) **A**

The Personnel Manager Online Rostering System allows you to operate as many businesses as you like under one platform. Some users operate several businesses; others use it to break their staff up into regions, state by state, or city by city. The use of different businesses can also be used to operate different departments within the one company where the staffs of each department need to be kept separate from each other. The Businesses Page, in the very top left corner of the Admin Login, is where the different businesses are created and named. If there is a problem creating new businesses please email [info@personnelmanager.com.au](mailto:info@personnelmanager.com.au) as an additional fee may be required. Once the businesses are created, then it is possible to edit such details as business name, phone, fax, address, email. A display name can also be added, a different name that will display to Clients in their Client Login. The ability to create job sheets can be switched on or off per business, and whether the business is to use the Incoming SMS no. (Optional) is also decided here. It is possible to assign a Business Manager from the list of crew for each business, and assign a bonus rate for that manager (commission of a certain amount of \$ per hr of labour worked in that business).

Once new businesses are created they will appear on this page. Click “pencil” icon to edit and “X” to delete them.

**Custom Rates:** A whole new set of custom rates can be assigned to each business once they are created. (See “Rates” for more info) [AUB > Businesses > Custom Rates](#) **A**

### Add a New Business

Click the Business tab in the top left corner of the screen.

Click Add a New Business Record.

Add your business details into the fields provided.

*TIP: You can add as many different businesses as you like*

**Sort Number:** By assigning a Sort Number of 1 to a business, you enable it to be seen by Clients in their Login. If you have business that you do not wish to be visible to your clients, then assign it a Sort no of 0 (zero).

**Company Name:** Enter a business name in “Company Name” that you would like to create.

**Company Client Display Name:** A display name can also be added, a different name that will display to Clients in their Client Login when making online bookings.

**Manager Name:** This where a manager can be selected for this business.

#### **Add a Business Manager**

- Click the Crew tab under the Personnel Manager logo
- Click Add a New Crew Member (See “Add New Crew” for more details)
- Add your business manager’s details into the fields provided
- Click Add/Edit Crew Member to save
- Click the Business tab in the top left corner of the screen again
- Click the pencil icon (edit record) to the right of the business you have added previously (See Add a New Business for more info)
- Select your Business Manager from the drop down field to the right of Manager Name (this will be the New Crew Member you have just added)
- Click Add/Edit Business to save

**Manager Login:** Manager Login is the access that is granted when User type Manager is selected in the Login Page. The Manager has the ability to only view and edit the roster in one particular business. They have no ability to see what happens in other businesses. The Manager enters the Username and Password that is assigned in their Crew Member Details page (usually their mobile number for both until changed). Then in the Admin Login, at the top left of the screen, the Businesses Tab must be selected, and the particular business edited (pencil icon) and the Business Manager is selected here from the list of available Crew Members.

**Can Manager Create Job Sheet:** With “yes” selected in this option, assigned Business Manager will be able to create job sheets using “Manager” login details.

**Email Address:** Email address that PM uses when sending outgoing email addresses, which appears in the invoices (for this business). Also this email address receives the “Online Auto-Booking Forms” when created by clients in their Client Login Pages.

**2<sup>nd</sup> Email Address:** An alternative email address to send/receive copies.

**Phone, Fax, Mobile:** Contact details for this particular business.

**Incoming SMS:** Tick this option if incoming SMS, which is set in Global Settings should be used as company's mobile number. See "Your Incoming SMS to Web Number" for more info. [AUB > Global Settings > Your Incoming SMS to Web Number](#) **A**

**Street, Suburb, State, Postcode:** Physical address of Business. Can be left blank.

**Time Zone:** Select a time zone that the business will operate in. All shifts must be entered in their local time, so reminder messages of a 08:00am shift in Sydney and 08:00am shift in Adelaide are sent at correct times.

**Manager Bonus Rate:** It is possible to assign a bonus rate for "Business Manager" payable as a commission of a certain amount of \$ per hr of labour worked in that business.

**Import Key:** Allows for thumbprint software PeopleKey integration.

**Account Details:** In the Global Settings Page, you can enter your default Accounts Details. These will appear on the Tax Invoices you send to Clients. If any business you have created needs to use a different account details than the default one, then leave "Use Separate Accounts Details" unticked. Otherwise simply enter each businesses account details in this section.

# PAYROLL

[AUB > Payroll](#) **A**

The Payroll Page displays a calculation of all the pay rates for your staff in a certain pay week. The pay week is Monday to Sunday. The Payroll Page defaults to the previous pay week and will display all the staff that have worked for certain business in that pay week, the Activities they have done the amount of hours they have worked in each different Activity, with a calculation of the total pay for the week. The Total Hours for the Business are also shown for the week and the amount of commission the Business Manager has earned.

It is possible to check any pay week including the current one by selecting any date in the calendar and then pressing **“Show Payroll Week”**, which brings up the pay roll records of the week that the selected day belongs.

It is possible to check the Payroll records for any individual Crew Member for any week worked in the past or current. Select the crew name and enter a date, then press **“Show Pay Records”**.

## MYOB Export

[AUB > Payroll > MYOB Export](#) **A**

### Import/Export Instructions

#### Part A: Crew Member MYOB Card ID

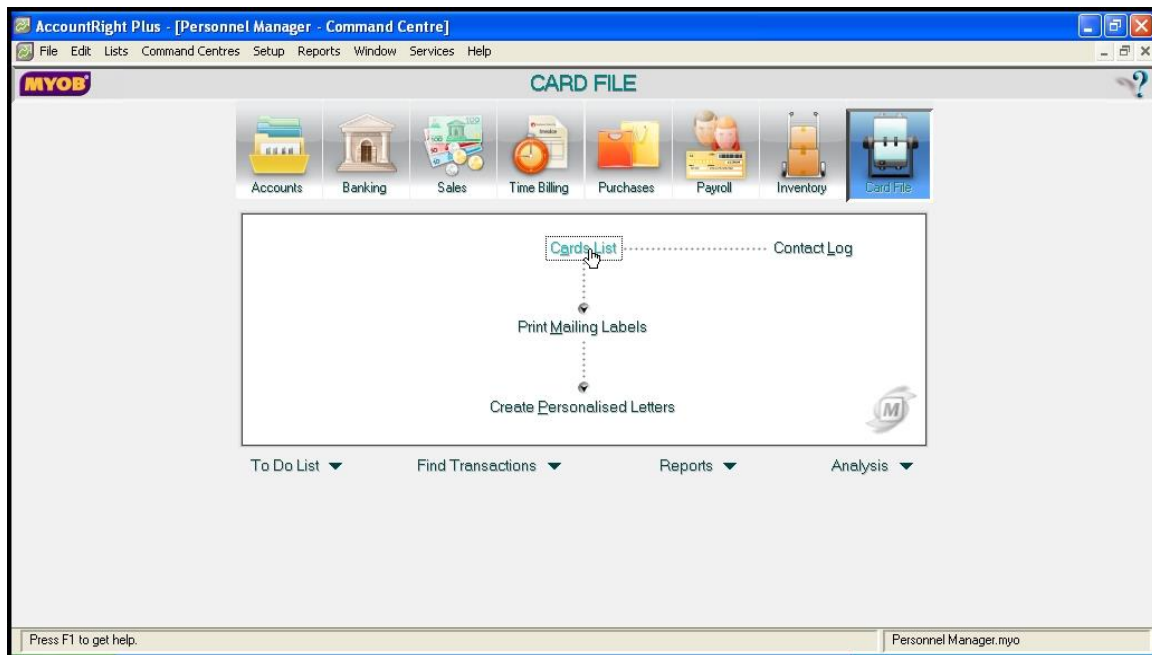
Please ensure that Personnel Manager has the correct MYOB Card ID for each crew member. You can view or edit the MYOB Card ID on the Crew Page.

Rank	PM Company	Photo	First Name	Last Name	Main Email	Mobile	MYOB Card ID			
1	PM Sydney	-	John	Smith		0401 000 000	<input type="text" value="0401000000"/>	SMS		
2	PM Sydney	-	Jane	Doe		0422 000 000	<input type="text" value="0422000000"/>	SMS		

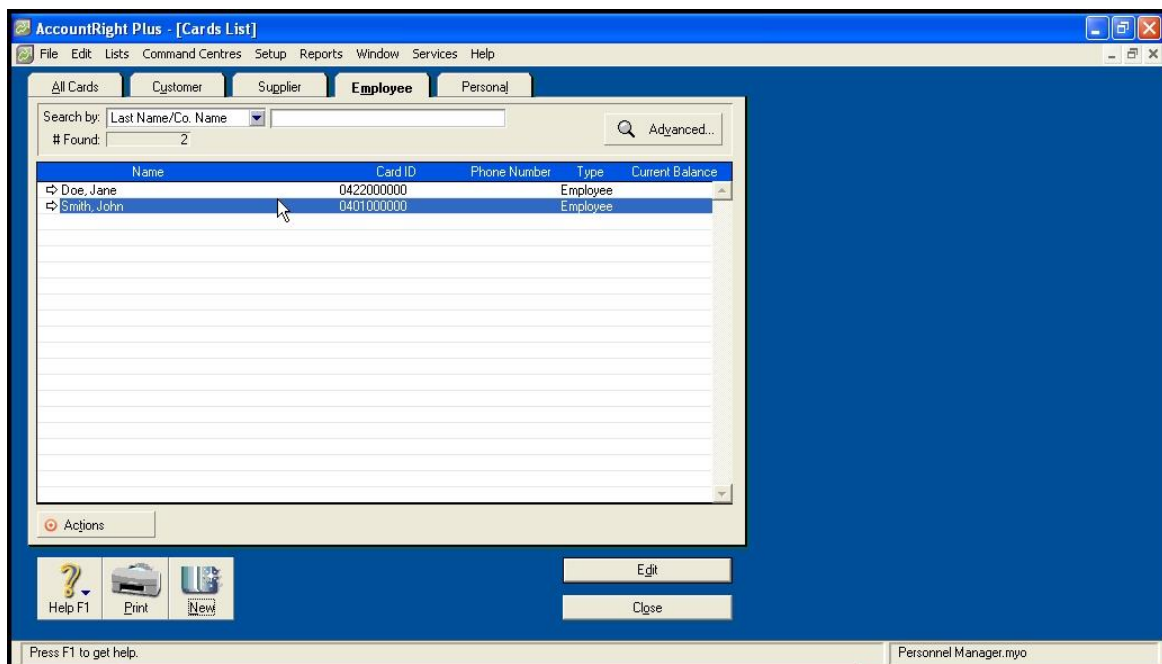
[Save Details](#)

To view/edit the crew members Card ID in MYOB:

Go to the **Cards** tab in the Command Centre and click on **Cards List**.



Select the **Employee** tab and you will see a list of Employees and their Card IDs



Double-click an Employee (Crew Member) to open their Card.

The screenshot shows the 'AccountRight Plus - [Card Information]' window. The 'Profile' tab is selected, displaying details for 'Doe, Jane' with Card ID '0422000000'. The form includes fields for Card Type (Employee), Designation (Individual), Last Name (Doe), First Name (Jane), Card ID (0422000000), Location (Address 1), Address, City, State, Postcode, Country, Phone#1, Phone#2, Phone#3, Fax, Email, Website, and Salutation. An 'Actions' button is at the bottom left, and an 'OK' button is at the bottom right. The status bar at the bottom indicates 'Press F1 to get help.' and 'Personnel Manager.myo'.

Enter a new Card ID and press **OK** to save.

## Part B: Payroll Categories

Create the Payroll Categories you wish to use with Personnel Manager.

Please make sure all crew are assigned to these categories in MYOB.

*TIP: Consult the MYOB User Manual for instructions on how to do this.*

## Part C: Export from Personnel Manager

View the payroll week you wish to export.

Click the MYOB Export link located next to the company you wish to export.

Available Businesses: **PM Sydney** [Click here to logout](#)

[Login](#) > [Ops Home](#) > [Payroll](#) > [View](#)

**PM Sydney | Week Ending: Sun 14-11-10 | MYOB Export**

**Jane Doe** | PM Company: PM Sydney | Week: Mon 08-11-10 - Sun 14-11-10 [Show Information](#)

No.	Date	Activity	Client	Time On	Time Off	Breaks	Hours	Pay	Pay Rate	Total Pay	Bonus	Bonus Rate	Total Bonus	Shift Total
<b>Totals:</b>							<b>40.00</b>			<b>\$800.00</b>			<b>\$120.00</b>	<b>\$920.00</b>
							40.00	Standard	\$20.00					\$800.00
							40.00	Bonus	\$3.00					\$120.00

**John Smith** | PM Company: PM Sydney | Week: Mon 08-11-10 - Sun 14-11-10 [Show Information](#)

No.	Date	Activity	Client	Time On	Time Off	Breaks	Hours	Pay	Pay Rate	Total Pay	Bonus	Bonus Rate	Total Bonus	Shift Total
<b>Totals:</b>							<b>7.50</b>	<b>77.50</b>		<b>\$3,550.00</b>			<b>\$232.50</b>	<b>\$3,782.50</b>
							22.50	After Hours	\$10.00					\$225.00
							22.50	Overtime	\$10.00					\$225.00
							77.50	Overtime	\$20.00					\$1,550.00
							77.50	Standard	\$20.00					\$1,550.00
							77.50	Bonus	\$3.00					\$232.50

[Show All Information](#) | [Hide All Information](#)

You will be presented with a list of rates. Enter the corresponding MYOB Payroll Category for each rate.

[Ops Home](#) | [Shifts](#) | [Crew](#) | [Search Crew](#) | [Clients](#) | [Venues](#) | [Deleted Shifts](#) | [Rates](#) | [Categories](#) | [Activities](#)  
[Incompatible Client-Crew](#) | [Unavailability](#) | [On-Contacts](#) | [Shift History](#) | [SMS](#)

Available Businesses: **PM Sydney**

[Login](#) > [Ops Home](#) > [Payroll](#) > [MYOB Export](#)

**MYOB Payroll Export**

To export to MYOB please check the Payroll Categories below and press Export. [Click here for detailed instructions on how to Import into MYOB.](#)

Paid Name	Paid Rate	MYOB Payroll Category
After Hours	\$10.00	<input type="text" value="After Hours \$10"/>
Bonus	\$3.00	<input type="text" value="Bonus \$3"/>
Overtime	\$10.00	<input type="text" value="Overtime \$10"/>
Overtime	\$20.00	<input type="text" value="Overtime \$20"/>
Standard	\$20.00	<input type="text" value="Standard \$20"/>

**Export**

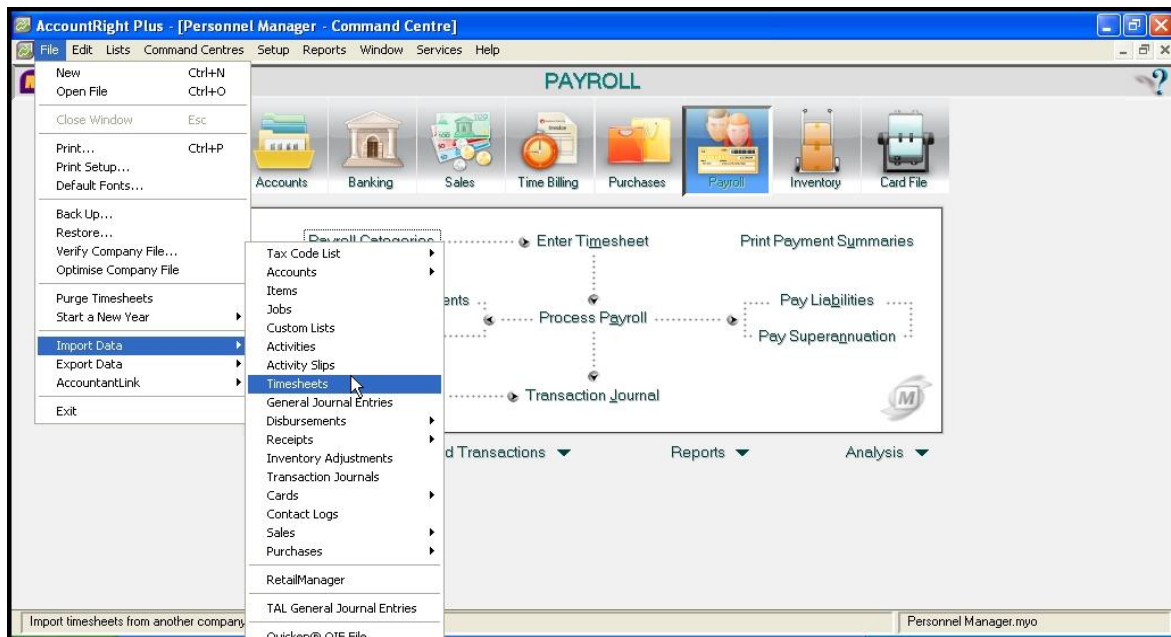
Personnel Manager, C27/99 Jones Street Ultimo NSW 2007 Australia  
 website: | email: [master@personnelmanager.com.au](mailto:master@personnelmanager.com.au) | fax: | tel:

Press **Export** to save changes and export a TXT file.

You will be presented with a file download. Save the TXT file to your desired location.

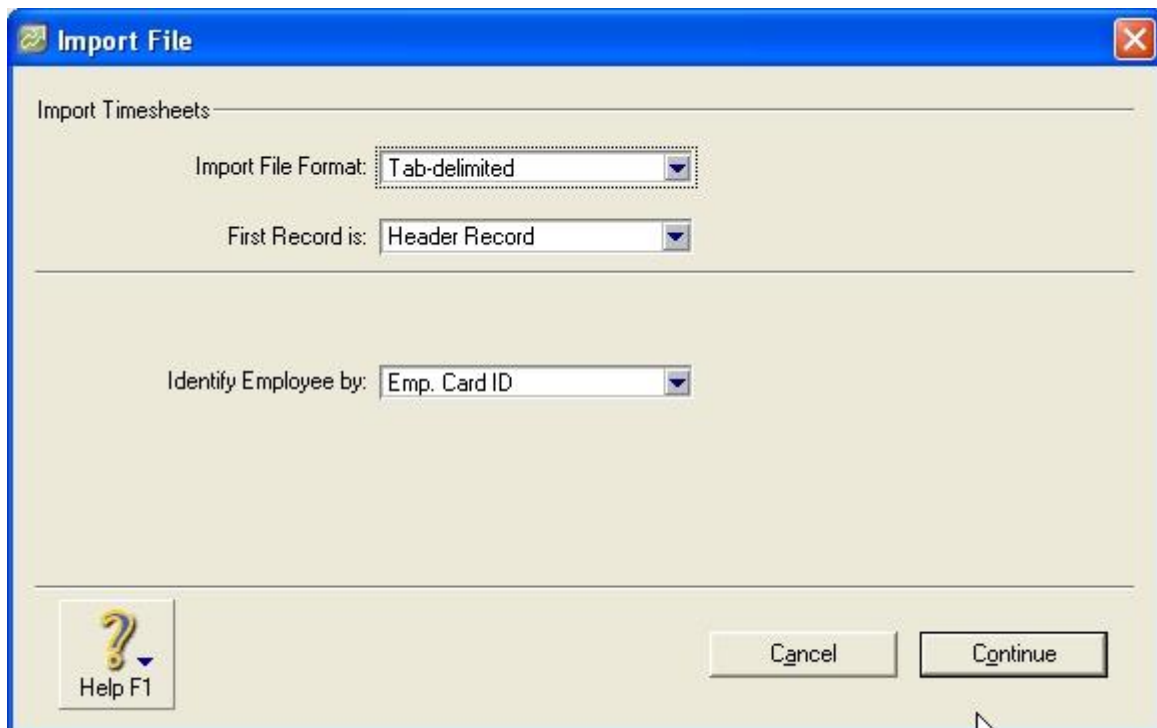
## Part D: MYOB Import

Go to File → Import Data → Timesheets



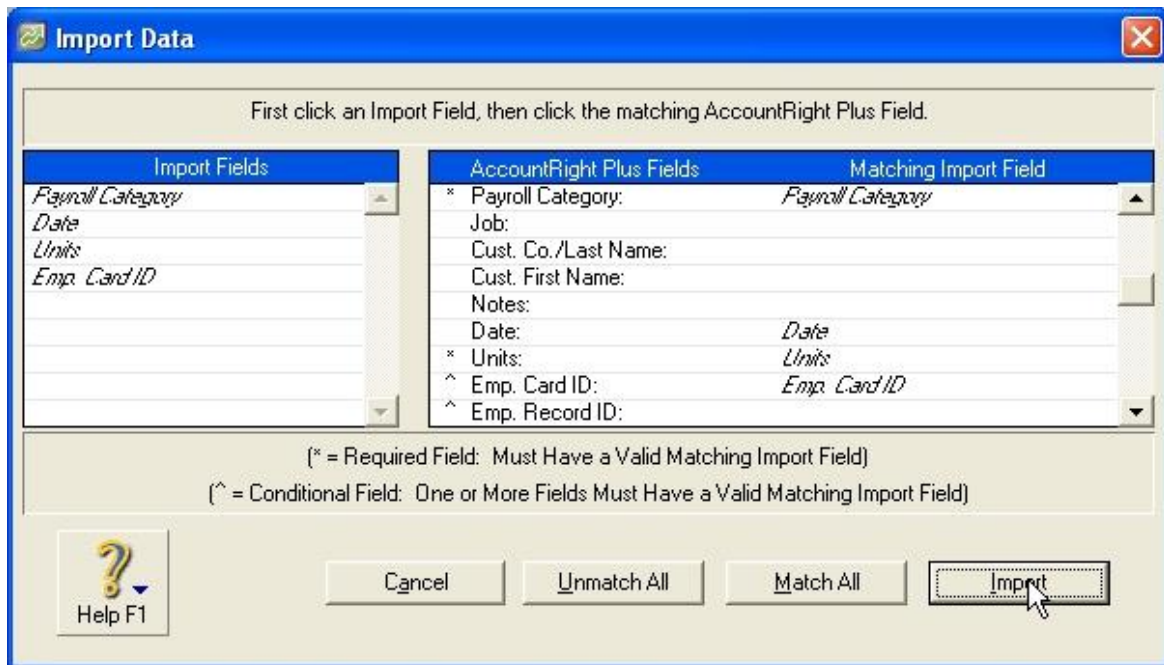
You will be presented with a dialogue box. Please set the following options:

Input File Format	Tab-Delimited
First Record Is	Header Record
Identify Employee by	Emp. Card ID

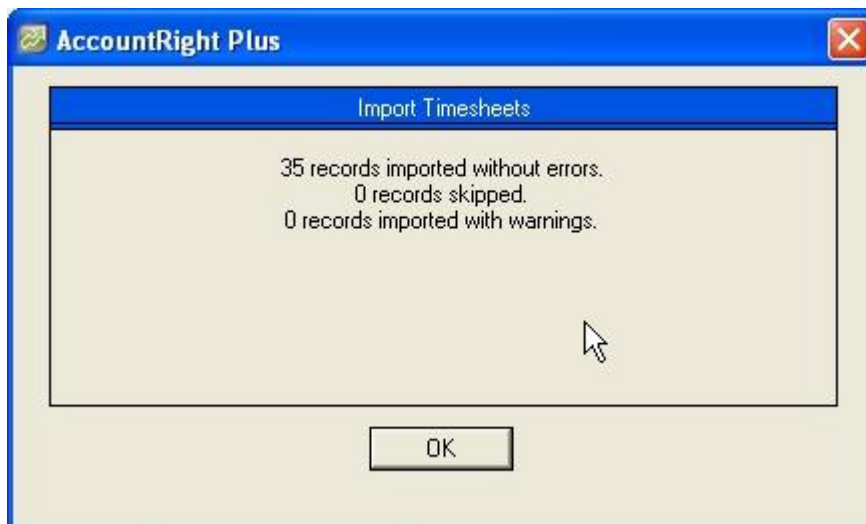


Select the file you wish to Import.

Match the fields to be imported.



Press **Import**. You will see a success dialogue. If the dialogue shows that errors have occurred. **DO NOT IMPORT THE FILE AGAIN**. Importing again will result in duplicate timesheet entries.



### Part E: Verify Import

You should now see timesheet entries for the imported dates.

[illegible]

# TIMESHEETS

[AUB > Timesheets](#) **A**

Timesheets Page helps to create timesheets that you can export to Excel with modifiable columns such as total hours of work that each crew have done, total charge, profit, margin etc.

## How to use TIMESHEETS

**Time sheets search bar:** A time sheet of a single crew between set dates can be viewed, printed or emailed. Select the crew name where it says **“Member”**, choose “from” and “to” dates, then click “Search”, you will then be able to see all shifts that this crew worked / scheduled to work.

Another type of search can be made by **“Job sheet number”**, simply enter the job sheet number and click “Search”.

**“Get time sheet related to date”** can be used to bring up all records that fall within the week of the selected date, which then can be selected one by one.

The following are the key points that can be done on the ‘Timesheets’ page in order to view or export them.

1. Enter a date in ‘Get timesheet related to date’ – this will return the timesheets in the week that contains this date,
2. Select the individual timesheet(s) or click ‘Select All’,
3. Tick the ‘Approved’ checkbox on any timesheet. This will ‘Approve’ all selected timesheets,
4. Click Save,
5. Click either ‘Export Approved Timesheet’ (for individual timesheets) or ‘Export All APPROVED Records’ for all timesheets in the timesheet period,

Available Businesses: [Tableau 1](#) [Tableau 2](#) [Tableau 3](#)

Member:  From Date:  Until Date:  Job No:  [Search](#) [Reset](#)

[Export All Records](#) [Export All APPROVED Records](#) [5a](#) Get timesheet related to date:  [Search](#) [1](#)

Dean Lewis | Mon 19-12-16 - Sun 25-12-16

[Export Record](#) | [Export as Approved Timesheet](#) [5](#)

No.	Job	Lock	Date	Activity	Scheduled	Actual	Time On	Time Off	Breaks	Paid Date	Pay Category	Qty	Each	Hours	Paid	Total	Timesheet Notes (Crew)	Approved	Update Rates
27	Wed 20-12-16	Q	Wed 21-12-16	General	08:00	12:00	08:00	17:00	C: 0.50		Variable Rate			8.50		425.00		<input checked="" type="checkbox"/>	<a href="#">3</a>
							08:00	17:00			Casual Rate			8.50	30.00	255.00			
							08:00	17:00			Casual Rate			8.50	20.00	170.00			
				Approved Totals :					0.50					8.50		425.00			
											Variable Rate			8.50	30.00	255.00			
											Casual Rate			8.50	20.00	170.00			

1 of 1 page(s) - 2 record(s)

Tableau Technology, street town SA 5000 Australia  
 website: [www.personnelmanager.com.au](http://www.personnelmanager.com.au) | email: [dean.lewis@tableautech.on.net](mailto:dean.lewis@tableautech.on.net) | fax: | tel:  
[Report Bug/Issue](#)

[Cancel/Delete](#) [Time Change](#) [Offer Shift MESSAGE](#) [Offer Shift SAME CREW?](#) [Offer Shift MULTI ROSTER](#) [CONFIRM](#) [CONFIRM w/o MESSAGE](#) [CONFIRM MULTI](#) [MAKE UNAVAILABLE](#) [LOCK](#) [UNLOCK](#)

[2a](#) [Select All](#) [Select None](#) Apply to selected shifts: [Select an action](#) [4](#) [Save](#) [Reload on Save](#)

Once the Excel file has been created you can open and should see all the timesheet info you are after, including breaks (as per below)

Dean Lewis   PAY wk commencing Mon 19-12-16 - Sun 25-12-16																
Date	No.	Job	Company	Activity	Scheduled	Discheduled	On	Time On	Time Off	Breaks	Pay Category	Qty	Each	Hours	Paid	Total \$
Wed 21-12-16	227		Tableau 1	General	08:00 am	12:00 pm	08:00 am	17:00 pm	0.50					8.50		425.00
				General			08:00 am	17:00 pm	0.50	Variable Rate				8.50	30.00	255.00
							08:00 am	17:00 pm	0.50	Casual Rate				8.50	20.00	170.00
										Variable Rate				8.50	30.00	255.00
										Casual Rate				8.50	20.00	170.00
				Totals:					0.50					17.00		425.00

## Settings for time sheets

Please note that it is possible to configure the Timesheet to your preferences by going to the Global Settings Page, scrolling down to Timesheet Configuration and editing the parameters found there. You can rename, re-order, hide or delete titles from your Timesheet. Titles include: Job sheet Number, Shift Number, Meeting Place, Crew Member Name, Mobile Number, Signature, Activity, Task, Start Time, Blank Field (blank text box to manually write the start time on the Timesheet), End Time, Blank Field (blank text box to manually write the end time on the Timesheet), Break Start, Break End, Instructions and Notes.

**AUB > Global Settings > Timesheet Configuration A**

# INVOICES

AUB > Invoices A

The screenshot shows the 'Invoices' page in the Personnel Manager system. A blue arrow points to the 'Invoices' link in the top navigation bar. The page displays a list of invoices with the following columns: No., DMO Company, Client, Amount (ex GST), Accrued Interest, Invoiced Interest, GST, Total (inc GST), Date Sent, and Date locked. A 'Searched Invoice Total' of \$19,976.20 is shown on the right. The table lists several invoices, including those for Client X, Kingsgrove RSL, and ANZ.

No.	DMO Company	Client	Amount (ex GST)	Accrued Interest	Invoiced Interest	GST	Total (inc GST)	Date Sent	Date locked
26-1	My Company	Client X	0.22	-	0.00	0.00	0.22	Tue 18-02-14	-
(14-12)-1	My Company	Kingsgrove RSL	0.60	-	0.00	0.06	0.66	Tue 31-03-15	Sun 15-05-16
Amroc-1	My Company	Client X	-	-	0.00	0.00	0.00	Mon 29-06-15	Tue 01-03-16
77-1	My Company	Client X	440.88	-	0.00	0.00	440.88	Thu 09-07-15	Sun 15-05-16
78-1	My Company	Kingsgrove RSL	960.00	-	0.00	96.00	1,056.00	Fri 10-07-15	-
104-1	My Company	Test123	360.00	-	0.00	36.00	396.00	Fri 26-02-16	-
ANZ-23X-1	My Company	ANZ	7840.40	-	0.00	784.04	8,624.44	Tue 01-03-16	-
ANZ-23X (13-03)-1	My Company	ANZ	2240.00	-	0.00	224.00	2,464.00	Mon 09-05-16	-
Coca Cola XXX-1	My Company	New Client	1560.00	-	0.00	156.00	1,716.00	Tue 08-03-16	-
SEP 27 June (17-04)-1	My Company	SEP	4800.00	-	0.00	480.00	5,280.00	Fri 15-04-16	-

The Invoices Page has some great features for those who send their tax Invoices to their Clients using Personnel Manager (Labour Hire Companies).

It is very simple to operate. Once an Invoice has been sent (emailed) to a Client, it will then appear in the Invoice Page. AUB > Invoices A

Once the Invoice has been paid by the Client, then the Invoice can be “Locked”. In this way it is very easy to Search Unlocked Invoices to see a list of Clients that are outstanding in their payments.

## Advanced Invoice Search

By default, the “Invoices” page displays all the Invoices that have been sent by the Personnel Manager system. An advanced search can be made using the “**Advanced Invoice Search Bar**” features. You can search Invoices by Invoice no, Client and/or Date. You can see each Invoice by number, the Business from which it was sent, the Client, the amount of the invoice, the date it was sent and the date it was locked.

The totals of invoiced amount is shown on the right hand side of this bar where it says “**Searched Invoice Total**”.

**No.:** Invoices can be searched by number. Simply enter the invoice number and click Go.

**Client Name:** Allows searching all invoices by client.

**Date From, Date To:** Any search can be narrowed down by date.

**Outstanding and Open Invoices:** When selected any search you make will only come up with outstanding and open invoices.

**Deleted Invoices:** This option will only show deleted invoices and just as with any other option, it can be combined when making a search.

**Show Only Selected Invoices:** if some of the invoices need to be viewed for an easier review which cannot be refined (because they may not have a common filter to perform a search) then each invoice can be selected in the list and clicked Go while “Show Only Selected Invoices” option ticked. PM then shows only these invoices, therefore showing totals in the right hand side of “Advanced Search Bar.”

**Show Client Totals:** This option brings up the results that are grouped by clients. So for example if last 30 days has been selected and this option is ticked, then PM will show all client totals of last 30 days. Or if it’s combined with “Outstanding and Open Invoices” it will only show all outstanding invoices by clients rather by each invoice. You will see a new button appear when a search is made using this option which says “Send Statement”. This is an easy access button to send any statements to any client whether you need to send all of their invoices or all of their outstanding invoices (depends on the results of initial search option).

### “Select an Action” drop down list

**Apply Interest:** Interests are calculated automatically by PM based on the percentage and grace period set in Global Settings. [AUB > Global Settings > Accounts Details \(for Invoices\) A](#)

To apply interest to any outstanding invoices select them in the list and click Select an Action drop down list and choose “Apply Interest”. This will add accrued interest to the selected invoice(s). They can now be sent to clients. Alternatively green “right arrow”, which are in the middle section of each invoice line, can be clicked to apply the accrued interest amounts to each invoice.

**Email Statement:** An EMAIL STATEMENT (HTML email) can be emailed to all relevant Client Contacts outlining exactly which Invoices have not been paid, how much money is owing and the date the Invoice was first sent. This can be done for one Client or ALL Clients with outstanding debts.

**AUB > Invoices >Select Client > Check Outstanding and Open Invoices >Check All > Select an Action > Email Statement A**

**Print Invoices:** The PRINT INVOICES feature will export a .pdf file of all selected Invoices which can be saved to your computer.

**AUB > Invoices >Select Client > Check Outstanding and Open Invoices >Check All > Select an Action > Print Invoices A**

**Lock Invoices, Unlock Invoices:** These options either lock or unlock the selected invoices.

### **Locking Invoices**

To the right of each Invoice record there is a Padlock Icon. When a Client has paid an Invoice, click the padlock Icon to 'lock' the Invoice. If you wish to see which Invoices have not been paid, click the Outstanding and Open Invoices box and press GO. This will bring up a list of all 'unlocked' (overdue) Invoices. If you wish to see how much money is owed to you by a certain client, repeat this procedure and select the client from the list and press GO. You will see at a glance the total of how much money you are owed by this client, the Invoice numbers, the amounts of each invoice and the dates you sent the Invoices. By selecting a certain date range and pressing GO you can see at a glance your total turnover for that period.

## **CLIENT BOOKING BLOCK**

**AUB > Client Booking Block A**

This feature allows you to put a block on Clients making "Auto Bookings" (bookings made directly into the system by clients online) during peak periods where your resources may be stretched to the limit. In the event that a Client attempts to make an Auto Booking during that time period that is blocked, they will be prompted with a message to call or email your office.

To add a "Booking Block" click "**Add/Edit Client Booking Block**", then enter the business you want to create the booking block for, then fill out the date and time for the period and add a reason (optional), then click "Go".

# GLOBAL SETTINGS

## AUB > Global Settings A

Global Settings is the Page where the entire configuration for your particular version of the database is held. In this way it is possible for many different users of the system to customise it to meet their unique needs.

### Administrator User Login Details

Admin user name and password can be edited here.

### Duty Manager Login Details

Duty Manager User name and password can be edited here.

### Company Details

Company details that will appear on the PM software, invoices, quotes and various places within the PM.

### Accounts Details (for Invoices)

**Payment Terms:** X amount of days can be set for invoices which will appear as "Payment Terms: 7 days from date of invoice."

**Payment Grace Period:** "X" Number of days after sent date before the interest is charged.

**Percentage Interest:** Interest rate can be set here (per annum).

**Management Tax:** There are 2 options for adding a Management Tax (or any extra charge) to Tax Invoices as either a percentage % or a flat amount. Tick the Checkbox to activate the Management Tax. Even if you do not select a Management tax amount in Global Settings, you can add the Management Tax (called whatever you like) on tax Invoices on an individual basis. When you open a Tax Invoice (Ops Home > [any Invoice number]) at the bottom right of the Invoice, just click the Apply Management Tax Checkbox (it will be whatever name you enter in Global Settings Page) and enter the amount % or flat rate to add to the Invoice.

*For Example: If you wish to add a Credit Card Surcharge to your Tax Invoices, you could change the Management Tax Name to Credit Card Surcharge in Global Settings. Even if the Checkbox in Global Settings for management tax is not selected, when you open the Tax Invoice you can tick the Checkbox at the bottom right, enter the amount of the surcharge and Send Invoice.*

**Management Tax Name:** Name of Management Tax can be assigned here, i.e: Credit Card Surcharge

**Management Tax Amount:** Enter the amount you wish to charge extra on all Tax Invoices. If you add a % after the amount, the amount charged will be a percentage. If

you do not include the % then the amount charged will be a flat rate. Include a (-) before the amount and it will deduct this amount from the invoice.

**Accounts Email Address:** Email address for Accounts department

**Bank Name:** (Bank details)

**Business Account Name:** (Bank details)

**Business Account Number:** (Bank details)

**BSB:** (Bank details)

**Bank Country Code:** (Bank details)

**Invoice Code:** If desired a significant code can be given to appear in every single invoice.

*For example: if your company name is "Lorem Ipsum Pty Ltd", the code could be set as LIP, then all invoices would appear as LIP-12345, LIP-99999...*

**From Address:** "From Email Address" for quotes and invoices.

**Reply Address:** "Reply Email Address" for quotes and invoices.

### **Ops Home Configuration**

**Enable Quotes:** With this tick box, in "Ops Home" page quotes can be viewed or taken out.

**Enable Invoices:** With this tick box, in "Ops Home" page invoices can be viewed or taken out.

**Show Crew names per shift on Invoice:** Shows crew names on invoices sent to clients.

**Show Inhouse Client Reference Numbers:** Shows client numbers assigned by PM within PM.

**Use Inhouse Client Reference Numbers:** Tick to display 'Inhouse Client Reference Numbers' instead of 'Default Reference Numbers' on Job Sheets, Invoices and Quotes. Default Reference Numbers meaning Short names for clients (entered in Client Profile page) followed by automatically assigned job sheet/invoice number for each job sheet created. When unticked any number or name can be given to Job Sheets "manually".

**Group Shifts on Job Sheet, Shift Edit, and Crew View:** Groups shifts on job sheet page view by date, activity, shift edit or none.

**Hide RATES on Job Sheet and Shift Edit:** Hides or shows all rates on job sheet or Shift edit pages. Rates can be hidden if this information is unnecessary to view each

time in order to gain wider view to all shifts on the current page. (See “Rate / Paid / Charge” in Job Sheet Page for more info)

**Hide EXTRAS on Job Sheet and Shift Edit:** Hides or shows all Extras on job sheet or Shift edit pages. Extras can be hidden if this information is unnecessary to view each time in order to gain wider view to all shifts on the current page. (See “Add Extra” in Job Sheet Page for more info)

**Enable RATE overrides on Job Sheet, Shift Edit, and Timesheets:** Allows rates to be changed manually in job sheets/Shift Edit Page in order to override rates automatically assigned by Activity.

**Show RATE NAME in Crew Timesheet area instead of PAID NAME:** On crew page “Timesheets” page rates would be shown as “rate name” instead of “paid name”.

*For example 2 hours of “Sun” rate instead of “2hrs Sun (0.5x A rate)”*

**Job sheet "Onsite Contact" Heading:** Heading that appears on job sheets or crew pages which can be edited here i.e.: Client, crew chief...

**Job sheet "Onsite Contact Number" Heading:** Heading that appears on job sheets or crew pages which can be edited here i.e.: Client number, crew chief number...

**Display Onsite Contact WITHOUT number:** All onsite contacts can be viewed without phone numbers if desired.

**Sort Job sheets on Homepage by:** In “Ops Home” page job sheets can be sorted by whether client name or by earliest shifts’ start time.

**Hide Pay and Charge columns on Job sheet from ADMIN:** Pay and Charge details in job sheets can be hidden from user “ADMIN”.

**Hide Pay and Charge columns on Job sheet from DUTY MANAGER:** Pay and Charge details in job sheets can be hidden from user “DUTY MANAGER”.

**Hide Pay and Charge columns on job sheet from MANAGER:** Pay and Charge details in job sheets can be hidden from user “MANAGER”.

**Logo:** This is the area to upload company logo which appears on every page in PM.

## **Software Configuration**

**Group Shift Search Admin Summary by Client:** Excel Export Admin Summary in Shifts Page > Select an Action in the drop down list regrouped by this option.

**Enable Tasks:** When enabled, a dropdown menu appears on each shift labelled “tasks”, which can be edited in “Tasks” page. Very useful and convenient feature for assigning different tasks for each shift. (See “Tasks Page” for more information)

**In Crew login area, Tasks are:** “Hidden” or “Visible”; some of the tasks may be for office staff or operators only; this option makes all tasks to be hidden to crew.

**Enable Change of Business:** Personnel Manager may be set to organise many different businesses (see Businesses). This option allows users to easily move shifts from one business to another, without having to create a similar one from scratch under a different business.

**Default Business:**

- **Active Business:** When this option is selected, PM creates the new shifts under the currently selected business.
- **Job sheet Business:** When this option is selected, PM creates the new shifts under the job sheet business that’s assigned already.

**Crew Available across ALL Businesses:** Tick to enable Crew to be available across all businesses.

If not ticked, then the Crew will need to be assigned to businesses individually on crew their page.

**Default Category:** Every crew member should be assigned to a pay category (this is done in Crew Profile Page). Based on this selection in Global Settings page, PM will assign all crew to this default category, unless the crew member is assigned to one manually.

**Crew can enter finish time and Lock shifts function:** When enabled, all crew can lock off their shifts online by logging in to their crew page. This feature is recommended to be on, especially when working with large number of crew members, which would save a lot of office work.

**Show [x] days of past shifts in the Crew login area:** PM can be set up to allow the crew members to see their completed shifts in crew login page up to a certain amount of days in the past.

**Crew can lock off shifts with a Start Time falling:** “Before the current time”, “6-48 hrs in advance of current time” and “Any time” are the options for this feature, which allows crew to lock off their shifts “Any time”; “Before the current time”, which means shift start time must have passed to be able to lock, or 6-48 hours in advance of shift start time.

**Crew can change start time function:** For most businesses it is highly important and almost vital for a crew member to be present at work at a pre-scheduled start time. Nevertheless, allowing the crew members to lock their own times can be very helpful for relieving the office work load. But if not checked, some crew members may turn up late to work and still lock their shift at the scheduled time.

Using this feature in global settings, crew can still be allowed to lock off their times themselves but without being allowed to amend the start times of their shifts.

**Individual Crew that can change shift times:** Changing shift times can also be granted to certain crew in this area where all crew appears and be conveniently selected.

**Show double booking warnings in Crew login area:** Sometimes crew may be booked on two clashing shifts by choice and not by mistake. If it's preferred that the crew is not to be bothered with a warning, this option can be turned off otherwise crew will see a double booking warning in crew login area.

**Unlock double booking shifts in Crew login area:** This option will give crew the freedom to unlock double bookings in crew login page.

**Email Admin about a "Crew online lock off":** For convenience and faster payroll processing crew can be allowed to lock off their own times in crew login page as mentioned in *"Crew can enter finish time and Lock shifts function"*. This feature here can adjust PM to send an email to admin every time a shift is being locked off by crew. Choose;

**Never:** if you do not wish to receive any emails about online lock offs.

**Upon Lock off:** if you wish to receive an email as soon as any shift is locked off online by any crew.

**Upon Start Time Change:** if you wish to receive email ONLY when a start time is changed during lock off.

**Upon Any Time Change:** if you wish to receive email only when a time change is made before locking off.

**Send Client a "Crew online lock off" email:** Crew can be allowed to lock off their own times in crew login page as mentioned in *"Crew can enter finish time and Lock shifts function"*. PM can be set to send emails to admin as well as the clients, whom the crew has worked for. Choose:

**Never:** if you do NOT wish your clients to receive any emails about online lock offs.

**Upon Lock off:** if you wish your client to receive an email as soon as any shift is locked off online by the crew, who has worked for this client.

**Upon Start Time Change:** if you wish your client to receive email ONLY when a start time is changed during lock off.

**Upon Any Time Change:** if you wish your client to receive email only when a time change is made before locking off.

**Send the Businesses a "Crew online lock off" email:** If businesses need to be notified about crew online lock offs or not, choose:

**Never:** if you do NOT wish the corresponding business to receive any emails about online lock offs.

**Upon Lock off:** if you wish the corresponding business to receive an email as soon as any shift is locked off online by any crew.

**Upon Start Time Change:** if you wish the corresponding business to receive email ONLY when a start time is changed during lock off.

**Upon Any Time Change:** if you wish the corresponding business to receive email only when a time change is made before locking off.

**Crew can Accept Shifts:** Tick to allow Crew to accept shifts in their individual "Crew Area"

**Crew that CANNOT accept online:** All crew can be allowed to accept shifts online, which are already offered to them via SMS (see "Crew can Accept Shifts" for more information). Any crew member who is chosen not to be allowed to use this option can easily be selected from the crew list.

**"Allow Crew to see other Crew" and "Crew that can see ALL Crew on the same jobs":** Some or all crew can be allowed to see their crew mates of upcoming or past jobs in their crew page area. When "Allow Crew to see other crew" is ticked, crew that are allowed to see details of all other Shifts on the same job sheet in their "Crew Area" can be selected individually from the list.

**Allow Crew privacy:** This option would allow Crew to hide their details from other Crew in "Crew Area", should "Allow Crew to see other crew" is ticked.

**Allow Crew unavailability:** Not all crew can be available to work at all times, these unavailabilities can easily be entered by the crew into the system using their crew page so that these crew would not be sent any shifts that's clashing with their unavailability. Allowing crew to put in this information can be turned on or off using this option.

**Allow Shift Email:** "Email Shifts" allows you to contact staff with information about their Shifts by Email.

If Allow Shift Email is selected in the Global Settings Page, then crew members will have the ability to select whether they wish to be offered shifts by SMS or email or both.

Please note that if Shifts are offered by Email, a link is provided in the body of the email for the Crew Member to log in to their Crew Support Page and Accept/Decline the offered Shift/s.

In Global Settings, under SMS Configuration, the Email templates are editable so that all Email messages may be customized. The variable Fields are included as a tip below. You can copy and paste these Fields in the correct order to change the content of an Email (or SMS). Remember to save any changes by scrolling to the bottom of the Global Settings Page and pressing the Save Configuration button. You can restore the default settings of any Email or SMS at any time by pressing Back to Default under the relevant message.

**Crew that have privacy:** If any crew chooses not to share his/her details with other crew, which appears on the crew page under upcoming jobs, he/she can make a request to be put on this list.

**Show Crew unavailability on graph:** All shifts can be viewed in different formats such as list, calendar and graph. If you wish not to be bothered with crew unavailabilities, while looking at graph view, they can be turned off with this tick option.

**Unavailable Graph Colour (Hexadecimal) and Leave Graph Colour (Hexadecimal):** Colours of the Leave and unavailable blocks can be adjusted in this section.

**Group graph by:** Graphic view can also grouped by “Businesses” (set under PM) or “Crew Groups”.

**Crew that can view ALL SHIFTS in graph:** Some crew (usually high ranking crew) can be granted privileges to view all shifts, if their names are put in in this list.

**Crew that can view ALL shifts with their name (not just the 'C' and 'S' shifts):** In their Crew Support Page, Staff can normally see only confirmed shifts. With this option selected, Staff can see Shifts assigned (saved in the shift manually) to them even if not yet confirmed.

**Crew can Update Personal Details:** Tick to allow Crew to update their personal details in their individual "Crew Area".

**Crew can Upload Files:** Tick to allow Crew to upload files in their individual "Crew Area".

**Crew can View Pay Details:** Tick to allow Crew to view their pay details in their individual "Crew Area".

**Upload Notification Email Address:** PM is set to notify admin users with an automated email, whenever crew make any change or upload files. Put your email address in this line, to which you would like PM to send notification emails.

**Clients can view Crew Details:** Tick to allow Clients to view Crew Names and Mobile Numbers.

**Clients can view shifts:** Tick to allow Clients to view shifts in their “Client Pages”

**Clients that are allowed to enter time off in Shifts:** These selected clients can manually enter the finish times of the crew, who has worked for them.

**Clients can request a quote:** When bookings are put in by clients using online booking form, they are able to request a quote for the booking that has been put in. Enable this feature to make the “Request a quote?” option available in all online booking forms.

**Hide Crew first names from Clients:** All clients who are granted an online profile can make bookings, view their existing bookings and see crew names and status. This option will hide or show crew names to whom they are booked for.

**Clients can enter a PO number:** This feature will give the clients another option in the online booking form to enter their own desired PO numbers, which would also appear in their invoices, in order to process invoices without hassles.

**PO number text:** This is an editable text for “PO number” line which appears in the online booking form. Depending on the type of industry, this line can be edited to say, for example “PO number”, “Name of event” or “Purchase Order”...

**Automatically insert a [x] minute break every [x] hours for Shifts exceeding [x] hours in length. Extend time off to allow for breaks:** This useful feature allows PM to enter breaks automatically for which parameters can be set here in global settings.

**If admin break is not set, add a zero admin break and override the incoming Crew SMS breaks:** If any job does not have any breaks while being created by users and is not meant to have any breaks regardless of what crew texts in, this feature can be ticked and enabled. If crew’s break times are acceptable, then leave this box unticked.

**Crew Shift Buffer Warning:** [X] (Minutes). This will show a warning on the Shifts Page if an individual Crew member’s shifts do not have more than the set number of minutes between them. Set to zero to disable.

**SMS Shift Time Buffer:** [X] (Minutes) The actual shift start time minus the set amount of minutes. For example if this time is set to 15 minutes, Crew will be told to turn up at 08:45 for a 09:00am shift.

**Crew Car Pool Shift Overlap:** [X] (Minutes) Allowing Crew to see other Crew starting or finishing within the allocated time frame. So that crew are able to arrange a lift with other crew who may be driving to the same location.

**Crew Bonus Rate:** [X] (Dollars). Set to zero (0) to disable. Must enter a bonus amount to activate feature. The rate can then be edited in Categories>Edit Rates.

Crew Bonus Rate can be hidden or shown in Job Sheets/ Edit page. Crew Bonuses are added in Categories>Edit Rates>Bonus

**Long Shifts:** [X] (Hours) Over this amount of hours is considered a Long Shift. Set to zero (0) to disable.

**Long Shift Break:** [X] (Hours). A warning will be shown if the above number of hours is NOT given between an individual's Long Shift and the next Shift.

**Enable Webboard:** Tick this feature to enable the "Webboard" to be displayed in Client Login. When this feature is selected a new page will appear in the Client Login titled View Webboard. This will show a version of the Shifts Page that is not able to be edited, listing all the shifts across all businesses. If the shift number (or client job no) on the left is clicked; only the shifts associated with that particular job sheet will be displayed. Businesses tend to use this feature when they use their Project Managers as Clients, rather than their actual clients, as it does display all the shifts for all Clients. (See "Client Login Page" for more info)

**Codes:** (SMS or Email texts for codes 1-4): Names for Codes 1-4 can be assigned here which will appear in SMS messages, which are sent to crew depending on job requirements. And the email text codes which can be edited such as "This is an outdoor job" rather than just an "O".

**Show Start Time on Calendar:** Shows start times on Calendar View, which can be browsed through from the Shifts page.

**Show End Time on Calendar:** Shows end times on Calendar View, which can be browsed through from the Shifts page.

**Show Crew Name on Calendar:** Shows crew names on Calendar View, which can be browsed through from the Shifts page.

**Show Crew Mobile on Calendar:** Shows crew mobiles on Calendar View, which can be browsed through from the Shifts page.

**Show Crew Shift Number on Calendar:** Shows shift numbers on Calendar View, which can be browsed through from the Shifts page.

**Show Unavailability Alerts:** Unavailability alerts are shown on the shifts page when any crew is booked on a shift which is clashing with his/her unavailability.

**View Calendar by Client/Site:** Calendar view can be sorted and grouped by Client.

**Show Job Description on Calendar:** A description text can be entered on each job sheet on either Ops Home page or Job Sheet page, this feature will show that "description" on Calendar View.

**Show Warning if Crew Member has completed more than [X] [hrs/shifts] in [X] [time]:** If a warning needs to be triggered when any crew works more than certain amount of hours per period it can be entered here. For example "Show Warning if crew member has completed more than 40 hours in 1 week".

**Fields that are visible on spreadsheets:** PM can export any shifts on shifts page to Excel (See Export to Excel). It is possible to configure exactly which fields from the

shifts you would like to export into the Excel spreadsheet by using the table in the Global Settings Page. The unused fields stay in the left section of the table and the fields you wish to export go in the right section of the table. Click on the up and down arrows to arrange the order of the fields to be exported. Simply double click on the items in the table in the box on the left under Unused Fields to put them in the box on the right under Fields that are visible in Spreadsheets. Click on the up and down arrows to rearrange the order of the spreadsheet. The Fields from the top to bottom of this table will appear from the left to right of the spreadsheet.

**Auto-Booking email cancellation warning:** An example for the text box to appear in the online booking forms is: "BOOKING CONFIRMED. To cancel please email "ops@yourcompany.com" immediately."

**Client Booking Form Text:** This is an editable body of text which appears in the bottom of any booking confirmation, that's sent to clients when a booking is made using the online form.

**Crew message title:** This is an editable greeting title, which appears on first page of the Crew profile

**Crew message:** A body of message can be entered here, which will always appear on the first page of each Crew's profile page.

**After Hours Start Hour:** Reminder SMS messages can be set to be sent to crew after hours before x amount of time of the start times. This setting would be the beginning of afterhours mark.

**After Hours End Hour:** Reminder SMS messages can be set to be sent to crew after hours before x amount of time of the start times. This setting would be the end of afterhours mark.

**Alternate text for 'Crew':** The word Crew can be replaced with any other preferred word all across the PM using this line.

**Alternate text for 'Client':** The word Client can be replaced with any other preferred word all across the PM using this line.

**Alternate text for 'Shift':** The word Shift can be replaced with any other preferred word all across the PM using this line.

**Graph Colour Grouping:** As explained in "View shifts as Graph", all shifts can be viewed by working crew in certain period of time in a graphic view. This feature allows the users to see the shifts coloured by activities or job sheets.

**Calendar View Number of Weeks:** This feature allows you to switch the Calendar View to display the current week or the current week and the following week, In effect

you can view the Calendar as one week or two weeks depending upon your selection in Global Settings.

**Allow Shift Map Checking:** For those businesses who send their crew to different locations/addresses for work, may like to use the map options on PM. This feature allows the Duty Managers to drop a pin on a building, street or location to set it as a meeting point (which can be saved or edited under “venues” link on top of every page). And when crew log in to their profile page to view their upcoming jobs, they can see a satellite picture of the meeting point of each job. For crew to see the maps, first it needs to be approved by PM user. Click “yes” to turn on map checking here, so they appear on Crew App, Calendar and Crew profile page (See “Venues / Allow Shift Map Checking” for more info).

**Allow Shift and Job Sheet Note Checking:** When job sheets are created, there may be some notes to be entered in, which are vital for the job. If these notes must be checked (by clicking a check box), then select “yes” option, that way unchecked notes will appear in red, and checked notes will appear in green. If “no” is selected, then there would be no colour indication in the background of the “notes” icon.

**Show Scheduled times in excel export:** When selected, this option will allow the excel export feature to show all exported shifts’ scheduled times.

**Admin will confirm Crew Unavailability:** Unavailability of crew can be overseen and approved or disapproved utilizing this feature. If “No” is selected, then crew’s unavailability requests get approved immediately by PM. If “Yes” is selected, all unavailability requests should be approved by office staff/operators before they can be put in place.

**Order by rank in "Job SMS" area:** All crew are saved in the system with a ranking number. Considering this fact, PM users can keep the crew in a ranking order in “job sending page”, or only in alphabetical order starting with their first name.

**Order by rank in "Message" area:** All crew are saved in the system with a ranking number. Considering this fact, PM users can keep the crew in a ranking order in “send SMS page”, or only in alphabetical order starting with their first name.

**ObeY Crew Groups functionality:** Splits into Crew Groups rather than Businesses in “View Shifts as Graph” view and drop down crew lists on Edit Page. If clicked “yes” then only names of crew which are associated with each client on “Crew Groups” will appear on Job Sheet / Edit Page when sending out “shift offer” messages. Option “no” will show all crew but still highlight the crew names (in blue) that are associated with corresponding client on Job Sheet / Edit Page. (For more info see “Crew Groups”)

**Remove Crew - Client Association violations from Crew name lists:** Option “yes” removes staff completely from crew lists who are made Incompatible with certain

clients. Option “No” shows the names still but flags them as unavailable (For more information see “Incompatible Client – Crew”).

**Show Job Number in top right Job Sheet corner:** Shows job number in top right corner of job sheet page.

**Order Payroll by:** All crew in payroll page can be organised by their first name first or last name first.

**Display and Export Payroll according to:** Either exports according to Shift Date or Payroll Approval in Timesheets.

### Client additional information fields

[AUB > Global Settings > Client Additional Information Fields](#) **A**

[CNB > Client > Edit Record \(Pencil Icon\)](#) **A / DM / M**

Some clients may have specific requirements that are outside of your company’s standard operating procedures, if that’s the case and you would like PM to warn you about each time this client makes a booking, you can use this feature on Global Settings page as seen below. This feature enables you to customize the Client Details Page by adding Fields of your own choosing in the Global Settings Page. Fields can be added as a Text Box, a Text Area Box, Check Box or Drop Down Box. When entering Drop Down Boxes, separate the options with a ( | ). Warnings can also be selected here to display on the Shifts Page.

Once these fields are created, they will appear on each client’s profile page, which can be switched on or off by ticking boxes. Drop down menus can also be created to show more in-depth information about client’s requirements.

*Example: You could create a new Field called Dress Blacks to set a warning (reminder) on the Shifts Page that all Crew Members booked to work for this Client must wear Dress Blacks.*

136. Obey Crew Groups functionality:

137. Show Job Number in top right Job Sheet corner:

[Client additional information fields](#)

138. Show Warnings for required fields ☒

[Add Field](#) (For Checkbox Type: Default can be put 0 or 1, Extra can be put in any description text; Mark as Required to show warning message when not complete; Mark as Warn to show warning message when client has this option selected For Dropdown Type: please put the options separated by "|" in Extra field)

Caption  Type  Default  Extra  Required ☐ Warn ☒

[DELETE](#)

Caption	Type	Default	Extra	Required	Warn	
Corporate Dress	CheckBox	0	CALL ALL CREW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">DELETE</a>
6 Man Crew Chief	CheckBox	0		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">DELETE</a>
Timesheet	CheckBox	0	Must be signed onsite by Client Contac	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">DELETE</a>

[Crew additional information fields](#)

139. Show Warnings for required fields ☒

[Add Field](#) (For Checkbox Type: Default can be put 0 or 1, Extra can be put in any description text; Mark as Required to show warning message when not complete; For Dropdown Type: please put the options separated by "|" in Extra field)

Hard Hat	CheckBox	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">DELETE</a>
Vest	CheckBox	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">DELETE</a>
Polo	Text	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">DELETE</a>

## Crew additional information fields

[AUB > Global Settings > Crew Additional Information Fields](#) **A**

[CNB > Crew > View Record \(Eyeball Icon\) > Edit Crew Details \(Pencil Icon\)](#) **A / DM / M**

This feature enables you to customize the Crew Members Details Page by adding Fields of your own choosing in the Global Settings Page. Fields can be added as a Text Box, a Text Area Box, Check Box or Drop Down Box. When entering Drop Down Boxes, separate the options with a "|". Warnings can be selected here to display on the Shifts Page.

For example if your crew needs to be issued a company uniform and a hand drill, you can create these fields on the Global Settings page; which would appear on each crew's profile page as tick boxes or drop down menus. As crew receive their uniforms and tools, these boxes can be ticked to indicate that these tasks are complete. Moreover, for an efficient follow-up, any unticked requirement would appear as a warning on shifts page if the crew is booked on any upcoming jobs.

[Crew additional information fields](#)

145. Show Warnings for required fields ☒

[Add Field](#) (For Checkbox Type: Default can be put 0 or 1, Extra can be put in any description text; Mark as Required to show warning message when not complete; For Dropdown Type: please put the options separated by "|" in Extra field)

Polo Shirt Size	DropDown		6 8 10 12 14 S M L XL XXL XXXL	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">DELETE</a>
Dress Shirt Size	DropDown		Same as polo 6 8 10 12 14 S M L XL	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">DELETE</a>
Polo	CheckBox			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">DELETE</a>
Dress Shirt	CheckBox			<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">DELETE</a>
Waist Pack	CheckBox			<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">DELETE</a>
Vest	CheckBox			<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">DELETE</a>
Hard Hat	CheckBox			<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">DELETE</a>
Podger	CheckBox			<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">DELETE</a>
Uniform has been explained	CheckBox			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">DELETE</a>

## Online Shift Acceptance Configuration

**Rank Required:** PM allows certain crew/employees to log in and confirm themselves on shifts that are available to them. This feature can be granted to only a group of crew

based on their rankings. For example; if this option is set at 3, only crew with rankings of 1, 2 and 3 will have access to online shift acceptance feature.

**Accept Interval:** When jobs are sent to crew to accept, this number of minutes will let PM to check highest ranking member after first acceptance. (0 for "first in first served") alternatively putting a "0" on this line will disable this feature and start confirming crew as they send acceptance messages.

**Show Shifts when unavailable:** On crew page crew are allowed to respond to shift offers and accept or deny them. This option allows crew to see offered shifts even if they set an unavailability within that period.

### **SMS Configuration**

**Send next day Shift Reminder SMS:** All crew who are booked on shifts on each day receives a reminder text message the day before at 1600 EST, which can be turned on or off here. See "SMS Crew Reminder (16:00)" below.

**Crew that receive SMS reminders:** "Day before reminder SMS"s can be customised not to send to certain crew if needed.

**Send After Hours Reminder SMS:** Another kind of SMS reminder can be sent to all crew right before their shift start time between 22:00 and 09:00. This option toggles on/off After Hours reminder SMS.

**Send After Hours SMS - Minutes:** [x] minutes. Crew who are booked on shifts that are starting between 22:00 and 09:00 will receive a reminder SMS message this amount of minutes before the start time.

**Crew that receive After Hours SMS:** After Hours reminder SMS's can be customised not to send to certain crew if needed.

**Automatically Add Used SMS to Clients Invoices:** This tick box, if checked, adds costs of SMS messages to be sent to crew in order to fill the shifts within that job sheet.

*For example, if 10 SMS messages are sent to confirm 2 crew, cost of 10 SMS's will automatically be added to the invoice belong to that job sheet.*

**Charge per SMS:** Cost of each SMS to be added to invoices is set here if "Automatically Add Used SMS to Clients Invoices" box is ticked.

**Email / SMS Message Configuration:** All SMS messages sent to crew can also be sent as an email. In this section, all SMS and email messages that are sent to crew regarding jobs can be edited (offers, cancellations, time changes, reminders, etc...). You can restore the default settings of any Email or SMS at any time by pressing "Back to Default" under the relevant message.

SMS Request Message: A simple “can you do...” message sent to crew. For single shifts.

SMS Request Message (2 connected shifts): SMS sent to crew when 2 shifts are connected. i.e.: “Can you work on Saturday 12:00 – 15:00 and Sunday 08:00 – 12:00?...”

SMS Request Message (more than 2 connected shifts): SMS sent to crew when more than 2 shifts are connected.

SMS Notify Crew of Change Message: A new message sent to already confirmed crew informing that times/dates have been changed. i.e.: “You were booked on this, now it has been changed to this. Do you accept?”

SMS Cancellation Message: Notifies crew who are booked on a particular job that has now been cancelled.

SMS Confirm Message: Confirmation message sent to crew confirming them on shifts, with details of the job.

**SMS Confirmation**: Tick to NOT send SMS confirmation messages. When accepted by crew, shifts get confirmed but a “Confirmation message” will not be sent.

SMS Multi Confirm Message: SMS sent when crew accepts one message which contains multiple shifts.

SMS Decline Message: Informs crew who said “yes” to SMS request message but it has been filled by other crew already.

SMS Crew Reminder (16:00): The message that is sent to all crew at 16:00 the day before their start time.

SMS Onsite Contact Reminder (16:00): The message that is sent to all onsite contacts at 16:00 the day before their start time.

SMS Crew Reminder (After Hours): Afterhours reminder message can be edited here.

SMS Onsite Contact Reminder (After Hours): Afterhours reminder messages that are sent to onsite contacts can be edited here.

Email Request Message: A simple “can you do...” message sent to crew in email format. For single shifts.

Email Request Message (2 connected shifts): Email sent to crew when 2 shifts are connected i.e.: “Can you work on Saturday 12:00 – 15:00 and Sunday 08:00 – 12:00?”

Email Request Message (more than 2 connected shifts): Email sent to crew when more than 2 shifts are connected.

Email Notify Crew of Change Message: A new message sent to already confirmed crew informing that times/dates have been changed. “You were booked on this, now it has been changed to this. Do you accept?”

Email Cancellation Message: Notifies crew who is booked on a particular job that it has now been cancelled.

Email Confirm Message: Confirmation message sent to crew confirming them on shifts, with details of the job.

Email Decline Message: Informs crew who said “yes” to SMS/Email request message but it has been filled by other crew already.

Email Crew Reminder (16:00): The message that is sent to all crew at 16:00 the day before their start time.

Email Onsite Contact Reminder (16:00): The message that is sent to all onsite contacts at 16:00 the day before their start time.

Email Crew Reminder (After Hours): After hours reminder email message can be edited here.

Email Onsite Contact Reminder (After Hours): After hours reminder messages that are sent to onsite contacts can be edited here.

### **SMS Incoming Configuration**

**Your Incoming SMS to Web Number:** Mobile number that’s dedicated to use with PM when sending and receiving SMS messages. It is possible to have an Incoming SMS number assigned to your version of the Personnel Manager Labour Management Software (extra cost/optional). Messages can be sent directly to the system for the purposes of accepting/declining shifts; entering hours worked ‘locking off shifts’ or just sending an SMS message to the admin department.

**Incoming SMS IP Address:** IP address that’s dedicated to receive incoming SMS’s.

**Incoming SMS Lock Off:** tick box that allows crew to lock off their shifts with an SMS. (See “Lock Shifts” under “Shift Page” or “Job Sheet Page” and “Select an Action Drop Down List” for more info)

**Incoming SMS Lock Off Within:** [X] Lock Off Incoming SMS. Within this many minutes of the end of the shift before labelling them as “Late”.

**SMS Cut-Off Time:** [X] minutes. The shift will be marked 'T' (timeout) after this amount of time. Any acceptance messages that come after that will not be processed.

### **Footer Configuration**

**Footer Email Address:** Email address that appears in footers of PM web pages.

**Footer Website Address:** Web site address that appears in footers of PM web pages.

**Terms and Conditions:**

Client Terms, Crew Terms, Manager Terms, Admin Terms and Duty Manager can be edited here. These are the terms that corresponding user must tick the box to accept them each time before logging into PM.

**Client Booking Settings (Online Client Login Page)**

**Primary and Secondary Booking Skill:** Default activities that appear on the Client Online Booking page.

**Clients to have Booking Edit/Delete permissions:** Some (or all) clients can be assigned to edit their bookings. This option will allow the selected clients to see full crew list and copy/repeat shifts send SMS's to crew. This option can be used if PM is set as an internal rostering system and "clients" are set up as supervisors / managers within the company rather than actual clients.

**Clients to be able to view Payroll:** Some (or all) clients can be assigned to view Payroll details. This option can be used if PM is set as an internal rostering system and "clients" are set up as supervisors / managers within the company rather than actual clients.

**Minimum Call Hours**

Personnel Manager also allows you to set a default minimum call hour on Global Settings page for any activity unless the activity's minimum call is specified otherwise under "activities". (To set minimum call hours for each activity please refer to "Activities")

Furthermore minimum call hours can be adjusted based on which day of the week the call is on. For example minimum call hour can be set to 4 hours on the weekends, and 3 hours on weekdays.

**Email Message**

All email messages which are created through Personnel Manager for various purposes can be edited and saved as a draft in global settings page. i.e.: Invoice Message, Statement Message, Email footer, PDF Invoice text.

**Time Sheet Configuration**

Time sheets can be created for crew chiefs to go through the crew list onsite, to have records of actual times with breaks and to view notes related to venue and the job. These time sheets can be reviewed and signed by the client/supervisor onsite once completed. Any information on the time sheets can be edited on Global Settings page, including the column widths. (See "Timesheet" under "AUB" for more info)

**TIMESHEET**

Booking Date 31-01-14  
 Client Client X  
 Jobsheet CX 12  
 Venue Sydney Opera House  
 Meeting Place(s) S - Steps

No.	Staff	Member	Activity	On	Off	Break Start	Break End	Instructions	Notes
1	111	Bob Smith 0411111111	General	31-01-14 08:00am	31-01-14 12:00pm				
2	112	John Smith 0422218374	General	31-01-14 08:00am	31-01-14 12:00pm				
3	113	Buddy Gray 0412345678	General	31-01-14 08:00am	31-01-14 12:00pm				
4	114	Tyler Darden 0456789012	General	31-01-14 08:00am	31-01-14 12:00pm				
5	115	David Neil 0432109876	General	31-01-14 08:00am	31-01-14 12:00pm				

Jobsheet Notes

Venue Notes

	Name	Signature
Client Contact		
Supervisor		

**Output timesheet in this format:** Output of the time sheet page can be set as “portrait” or “landscape” for desired view options.

**Show "Onsite Contact" in header area:** Onsite contact name can be set to appear on time sheets.

**Show "Onsite Contact" number in header area:** Onsite contact number can be set to appear on time sheets.

**Group timesheet by:** Crew on time sheets can be grouped by either “time” or “activity” for easier view.

**Timesheet header area Warning and Timesheet header area Warning line 2:** A default message which will go on top of each time sheet as the header can be entered in this line.

**Timesheet footer:** A default message which will go on the footer of each time sheet can be entered on this line.

## Pay Period Configuration

**Pay Period:** In this feature pay period can be adjusted weekly, fortnightly or monthly which will affect ops home and payroll pages.

## Day Rate, Holidays, and Overtime Configuration

**Default Holiday Skill for working out Crew pay:** Crew rates on Public Holidays can easily be adjusted with this feature by selecting a default skill for it.

**Enable the Day Rates:** Day rates can be enabled or disabled with this selection. If disabled all rates will appear as flat rate.

**Does Paid Leave count towards overtime calculations:** Paid Leave can be calculated towards overtime or not, depending on this setting given overtime calculations have been set up in the Rates Page.

*Example: Company A allows Paid Leave to be calculated towards overtime calculations and has overtime of 'time and a half' set after 40 hours in a Pay Week in the Rates Page. If a Staff Member is accorded 50 hours Paid Leave per week, then Staff will receive the first 40 at normal rate and 10 hours at time and a half.*

*Company B does not allow Paid Leave to be calculated towards overtime calculations and has overtime of 'time and a half' set after 40 hours in a Pay Week in the Rates Page. If a Staff Member is accorded 50 hours Paid Leave per week, they will receive all 50 hours at normal rate.*

**Each Day of Paid Leave counts this amount towards the overtime calculation:**

Day Rates of Paid Leave can count towards overtime calculation or not depending on this setting given overtime calculations have been set up in the Rates Page.

*Example: Company A allows Each Day of Paid Leave to count towards the overtime calculation and has overtime of 'time and a half' set after 5 Days in a Pay Week in the Rates Page. If a Staff Member is accorded 6 Days Paid Leave per week, they will receive the 5 Days at 'normal rate' and the 6th Day at 'time and a half'.*

*Company B does not allow Each Day of Paid Leave to count towards the overtime calculation and has overtime of 'time and a half' set after 5 Days in a Pay Week in the Rates Page. If a Staff Member is accorded 6 Days Paid Leave per week, they will receive all 6 Days at 'normal rate'.*

**Remove breaks from overtime calculations:** If selected, desired breaks can be removed from overtime calculations.

**Show Overtime hours count in Time Sheet:** If Selected, Payroll Timesheets will display the amount of overtime hours as well as hours worked in the system.

**Overtime hours are referred to as:** What overtime hours are called in job sheets, invoices and quotes.

**Zero Crew breaks on Day Rates:** This feature will remove automatically added breaks from Day Rates. Breaks will still appear in Shifts with hourly rates.

**Other Configuration**

**Site Name:** Name of the company to which current PM version is dedicated.

**Website Slogan:** A brief catchy slogan for your company.

**Email Slogan:** The slogan that goes out on every email.

**Quote Template Settings**

*NOTE: Ensure "Set Customized Template as Default Option" is ticked for any of the below settings to be applied. If not ticked, PM will generate quotes using default settings.*


**Logo:** A logo that will appear on all quotes.

**Text Before Quote:** Any text that will appear before the quotation.

**Text After Quote:** Any text that will appear after the quotation.

**Quote Footer Text:** Any desired Quote footer text can be entered here.

TEXT BEFORE!!!  
TEXT BEFORE!!!  
TEXT BEFORE!!!  
TEXT BEFORE!!!  
TEXT BEFORE!!!  
TEXT BEFORE!!!  
TEXT BEFORE!!!

  
personnel manager  
www.personnelmanager.com.au

Staff Qty	Date	Activity	Venue	Room	PO No or Name of Event	Category	Time On	Time Off	Breaks	Hours/Qty	Rate	Total
10	Mon 10-10-16	General	Sydney Opera House		43539-SHS	A Rate	08:00 am	18:30 pm	0.50	10.00	\$44,500.00	\$445,000.00
5	Fri 11-11-16	Electrician	Carriageworks		43539-SHS	Electrician	12:00 pm	20:30 pm	0.50	8.00	\$3,200.00	\$3,200.00
							12:00 pm	20:30 pm	0.50	8.00	\$80,000.00	\$640,000.00
									Totals:	7.50	140.00	\$7,850.0000
											GST	\$785.0000
											TOTAL (inc. GST)	\$8,415.00

TEXT AFTER!!!  
TEXT AFTER!!!  
TEXT AFTER!!!  
TEXT AFTER!!!  
This quote is valid until Tuesday, 13 September 2016.

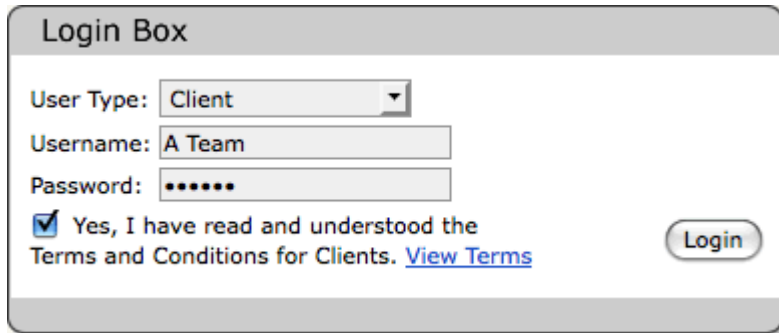
QUOTE FOOTER!!! | Page 1

**Quote Summary / Detail:** When “Summarised” is selected shifts with multiple crew are shown in one line as seen in the screen shot above. If “Detailed” is selected all individual shifts are shown in the quote as one line. So if a quote has 10x general staff doing the same job quote would have 10 lines, (1 for each staff booked).

**Set Customized Template as Default Option:** When ticked all preferences above (Quote Template Settings) become default settings for all Quotes

## CLIENT LOGIN PAGE

Client Login is the access granted to clients by selecting “Client” in the Login Page as the User type. The Username and Password for Clients are entered by Admin User on the “Clients” page (CNB) when adding or editing a Client. (See “Clients” for more info)

A screenshot of a web form titled "Login Box". It contains a "User Type" dropdown menu set to "Client", a "Username" text field with "A Team" entered, and a "Password" text field with six dots. Below these is a checkbox labeled "Yes, I have read and understood the Terms and Conditions for Clients." with a link "View Terms". A "Login" button is on the right.

Client Login allows the clients to make new bookings, view upcoming shifts and edit them. There are many optional features that can be added to the Client Login on the Admin Login (Global Settings) such as the ability for selected Clients to be able to make bookings online, even the ability for clients to view staff and payroll if these features are enabled. Some companies may choose to use Client Login Page as an internal system rather than allowing their clients to log in to it. For example, company managers, supervisors can be entered in the PM as “Clients” and they can use the “login page” to enter shifts under their name, see available crew and payroll and view upcoming and completed shifts.

### Your Details

Once logged in first page shows client’s details, which can be accessed by clicking “Your Details” button any time. New booking persons can be added by clicking “Add Booking Person” or edited by clicking “Edit Details”. “Edit Onsite Contacts” allows managing a list of all onsite contacts that can be chosen from the drop down list in each booking or job sheets. New onsite contacts can be entered here as well as booking page.

The screenshot displays the Personnel Manager web application interface. At the top, there are navigation buttons: "Your Details", "View Shifts", "View Webboard", "Make Booking", and a "Log Out" button with a red 'X' icon. The main content area is divided into two sections: "Your Details" and "Accounts Details".

**Your Details**

Your First Name: john  
 Your Last Name: Smith  
 Position Held: General Manager  
 Your Contact Number: 1234565789  
 Including area code.  
 Your Email Address: johnsmith@me.com

**Accounts Details**

Accounts First Name: Engelbert  
 Accounts Last Name: Humperdinck  
 Accounts Email Address: Ehump@me.com  
 CC Email Address:

At the bottom of the "Accounts Details" section are three buttons: "Edit Details", "Add Booking Person", and "Edit Onsite Contacts".

On the right side, there is a yellow sticky note titled "Client Details" with a paperclip icon. It contains the following information:

Client Details

Login / Password: ACME / ACME777  
[Change your password](#)  
 Client: ACME  
 ABN:  
 Address: 123 Jackson Rd.  
 Sydney CBD NSW 2000  
 Phone: 02 9123 4567  
 Mobile:  
 Fax:  
 Website:  
 Email Address: [johnsmith@me.com](mailto:johnsmith@me.com)

At the bottom of the sticky note is a warning icon and text: "If any of the above information is incorrect please contact DMO on".

At the very bottom of the page, there is footer text: "Personnel Manager, street town NSW 2000 Australia", "website: [www.personnelmanager.com.au](http://www.personnelmanager.com.au) | email: [no-reply@personnelmanager.com.au](mailto:no-reply@personnelmanager.com.au) | fax: | tel:", and a link "[Report Bug/Issue](#)".

## View Shifts

View shifts button brings up a shifts page displaying all shifts booked under this client. Shift search can also be made by date. What is allowed to be viewed to clients such as shifts, crew names and mobile numbers can be customised by Admin User in "Global Settings" of PM. Clients can also be allowed to enter/edit break times or notes for crew for each shift in this page. Clicking job numbers displays only associated jobs.

## View Webboard

Similar view to Shifts page, Webboard is a slightly different approach to managing shifts. Businesses tend to use this feature when they use their Project Managers as Clients, rather than their actual clients, as it does display all the shifts for all Clients. All shifts can also be searched by shift number, crew name and by date.

*TIP: Click "Reset Shift Search" to view all shifts under all clients.*

Webboard view can easily be disabled by going into "Global Settings" under Admin User. (See "Enable Webboard" for more info)

## Making a Booking

### Step 1)

**Job Location:** Dropdown list shows Businesses that are available (See "Businesses" for more info).

**PO No:** PO number is a mandatory field, any reference can be entered.

**Quote:** Clients can tick if they are requesting a quote to be emailed to them. This box will appear in the online Auto Booking notification email sent to you as “Quote: YES” or “Quote: NO”. PM does NOT send quotes automatically.

**Venue Details:** Venue details are entered here. (See “Entering a new venue in ‘Auto Booking Form’, ‘Shift Edit Page’ or ‘Job Sheet Page’” under the “Venues” for more info)

**Job Information:** This is where each activity, number of crew, date, start and finish times are entered in. All activities you created in PM do not have to be displayed to clients in this section; it can be allowed in Global Settings which activities to be shown in Online Booking Forms. For example, you may have a cleaning company and created different activities such as Floor cleaners, Kitchen cleaners, window cleaners but only allow your customers see “Cleaner” in the booking form. “**No. Days**” repeats the booking (x) number of consecutive days. If this will be a one day only booking then “1” must be entered.

Press “Proceed” to go to the second page of Online Booking Form.

## **Step 2)**

This is basically a review page for the details entered in the first step. You can navigate back to first step any time by pressing “Back” button in your browser without losing any of the information that is entered in the Step 1. On Step 2 any additional change can be made to each shift; they can be “copied” to add more or “deleted” by using the buttons on the right hand side.

*TIP: to apply a change to multiple shifts tick the boxes next to each shift first then make the change. Copy option only copies 1 shift at a time.*

**Staff Information:** Any requirements that clients may ask can be customised through PM so that clients can tick requirements if necessary for the booking. For example if “Corporate Crew” is created it will appear here on each online booking form, it can then be checked by clients if “corporate crew” is requested.

**Job Information:** Any additional notes, requests can be entered here, which will then appear at the bottom of any job sheet page where it says “Operations Notes (Not Visible to Crew)”. (See “Operations Notes” under “Job Sheet Page” for more info)

Before making the booking two tick boxes must be checked confirming that all information, meeting places and addresses are correct.

# STAFF INSTRUCTIONS

If you are a staff member of a company using the Personnel Manager online labour management system, the following information will be of benefit to you.

As a staff member you have the ability to communicate directly with the software in two ways:

1. Online – You can login to your Crew Support Page where you can:
  - View all of your upcoming shifts
  - Create a Subscription to your Internet Calendar using the Ical 2.0 link
  - Accept or decline shifts
  - Enter the hours you have worked
  - View other staff working on the same job **OPTIONAL**
  - Enter your unavailability (holidays, other commitments)
  - View your previous shifts
  - View your last 4 weeks' pay history **OPTIONAL**
  - Update your details
  - Upload your photo
  - Upload any scanned documents such as 1st Aid Certificates, Driver's License etc.
2. SMS – You can send SMS messages directly to the software to:
  - Accept or decline shifts via SMS
  - Accept or decline changes to confirmed shifts
  - SMS in times at the end of your shift (Auto lock shifts)
  - Inform ops of any message you want to pass on (Random SMS)

## 1. Info for staff using Crew Support page – ONLINE

The Personnel Manager online system has been established to give you the freedom to directly liaise with your employer, via the internet, to advise which shifts you would like to accept and to enter the times that you will not be available to work.

The first step is to login to your Crew Support page.

Use the link provided by your client to get to the login page. It may look like [www.personnelmanager.com.au/client](http://www.personnelmanager.com.au/client) or it may simply be a link from their website.

Where it says “User Type”, select CREW.

Your MOBILE NUMBER is your username AND your password.

Tick the acceptance box and press LOGIN.

Once you have logged in you can change your Password to something more secure.

### **View all of your upcoming shifts**

At the top of the screen click “Upcoming Jobs”. This will take you to a page which lists all the jobs that have been offered to you in the system.


### **Accept or decline shifts**

Scroll to the very right of the screen. You will see “Accept Shift”.

If you have been offered a shift, under Accept Shift, click “Yes” to accept or “No” to decline. Then click “OK” and you are booked.

If you have already accepted this shift you will see the word ‘Confirmed’ underneath.

### **Enter the hours you have worked**

On the very left hand side of the Upcoming Jobs Page, you will see unlocked padlock  icon. Once you have finished a shift, enter the correct finish time in the text box and then click the padlock icon to ‘lock’ your hours for that shift.

### **View other staff working on the same job** OPTIONAL

Also on the Upcoming Jobs Page, if you scroll to the far right, each of the shifts has faces icon.




Click this to bring up a list of the other staff members working with you on that particular shift and their mobile numbers. This will enable you to organise travel arrangements with these people, or you could know who to call if they are running late. (Note, your employer has to have this feature switched on at their end to make it visible.)

## **Enter your unavailability (holidays, other commitments)**

Click on the Unavailability tab at the top of the page.

Click  Add Unavailability

Fill in the details Date From/Time From and Date To/Time To.

To select the date you can either enter it manually in this format dd-mm-yy, or click on the icon  to open a calendar where you can select a day.

To enter a start/finish time, enter the time in this format 08:00. For 8am you could simply enter 8 and press tab and for 8:30am you could enter 8.3 and press tab.

If you select “Make this entry a weekly unavailability for the next 6 months” you will appear unavailable for the next six months for the times and date entered. So if you entered unavailability for the following Monday from 18:00 until 23:00 (same day) and selected this feature, you will appear unavailable every Monday evening for the following six months.

Enter a reason for your unavailability and click “GO”.

## **View your previous shifts**

Click the “Past Jobs” tab to view all of your past shifts for the previous four weeks.

## **View your last 4 weeks’ pay history** OPTIONAL

Click the Pay Details tab to be able to see your last four weeks’ pay history.

If you are invoicing your employer, then you should visit this page at the end of each pay cycle and invoice the exact amount set out in the totals column for the previous cycle.

You can check this page in order to ensure that all the times and shifts you have completed are correct.

## **Update your details**

Click the Personal Details tab to update your details such as new address, email address, bank details, and superannuation account.

## **Upload your photo**

In the Personal Details section you can browse your own computer for a photograph of yourself to upload.

## **Upload any scanned documents**

Click Personal Details and upload any important certificates such as Police Checks, Forklift Tickets, EWP Tickets, 1st Aid Certificates, Driver’s Licenses, Security License, anything that your employer needs to keep on file.

## **2. Info for staff using SMS**

The Personnel Manager software uses a designated SMS number to send messages to staff. We refer to it as the “Incoming SMS No” because it allows staff members to send messages to the software. It looks like an ordinary mobile number.

You cannot call the Incoming SMS No, it is for text messages only.

Your SMS messages will come into the system as emails and they will communicate directly with the system.

A log is kept of all outgoing and incoming messages. If a message sent is successful or unsuccessful, it is recorded in the log.

It would be a good idea to save the incoming SMS number to your phone.

### **Accept or Decline Shifts Via SMS**

If you receive an SMS in the form of a question, asking you whether or not you are available for a certain shift, you can now reply via SMS directly to the database to either Confirm or Decline that shift.

This SMS will appear something like this:

*“Can you do – Wed 12-09 07:45am, until 18:00pm approx. at The Hilton? Please reply 309y for YES or 309n for NO.”*

In the above example, the number you see (309) is the shift number.

If you would like to do this shift, all you have to do is reply to the SMS you were sent with the shift number and a “y” for yes (309y). There should be no spaces or any other characters. If you cannot do the shift then reply to the SMS with the shift number and a “n” for no (309n). The ‘y’ or ‘n’ can be upper or lower case.

If you choose to accept a shift, you will receive a ‘Confirmation SMS’ that looks like this:

*“Confirmed: Wed 12-09, 07:45am until, 18:00pm approx. at The Hilton,  
477 Pitt St, Sydney, SOB, Rob Hunt, 0412968317. Cheers”*

In the above message 15 mins has been deducted from the actual ‘Call Time’ to encourage you to be punctual. Also, the end time is approximate, please allow 4 hours after the estimated finish time in case the job takes longer than expected (unless you have another booking with your company).

Sometimes “Can you do...” SMS’s can be sent to multiple people to increase the chances of getting the shifts booked quickly. If you receive a “Can you do...” SMS and reply with a ‘y’ (309y) but it has already been given to someone else, then you will receive a message that looks similar to this:

*“Shift 309 is no longer available. Please stand by for more work. Cheers.”*

### **SMS Reminders**

If enabled by office, you may receive a reminder SMS sent to you at 16:00 the day before your shift. It looks like this:

*“Tomorrows Job: Wed 12-09, 07:45am until, 18:00pm approx. at The Hilton,  
477 Pitt St, Sydney, SOB, Rob Hunt, 0412968317. Cheers”*

Also, if your shift is due to begin between the hours of 2200 and 0800 (after hours) you may receive another reminder SMS shortly before your shift time (if enabled by office). The purpose of this SMS is a last minute fail safe in case you have forgotten that you were working that day. Always leave your phone switched on, near you with the volume up if you have an after-hours shift, in case you accidentally doze off. Your ‘After hours Reminder SMS’ will look like this:

*“Reminder: Wed 12-09, 07:45am until, 18:00pm approx. at The Hilton,  
477 Pitt St, Sydney, SOB, Rob Hunt, 0412968317. Cheers”*

You are not required to do anything at this point, as these are just reminder SMS's.

### **SMS in Times at the End of Your Shift**

Once you have finished work, shortly after your shift is completed; you can send an SMS to the Incoming SMS No detailing the hours you have just worked. You can reply to any of the messages sent to you from the “Incoming SMS No” in order to achieve this. The text message should be in the following format.

Start Time (4 digits, 24hr time, and no punctuation) Space (1 space only, no punctuation) Finish Time (4 digits, 24hr time, and no punctuation)

You do not need to include your name, or any other information at all. You are in effect communicating with the database yourself and locking off your own shift, so your SMS needs to be in the correct format.

Send;

*0800 1700*

If you worked from 8am until 5pm straight through, without a break.

### **Breaks**

If you worked from 0800 till 1730 and had a half hour break at midday, your SMS should be sent in between 1630 and 1830 (at the latest) in the following format:

*0800 1200 1230 1730*

If you received two breaks, then SMS them in the same format. For example, if you started your shift at 0800 and finished at 2100, but you were given a 1hr break at 1200pm and another half hr break at 1800, then your SMS should look like this:

*0800 1200 1300 1800 1830 2100*

If you SMS an incorrect start time the system will not read your message.

If you SMS any other info than the info required such as 'Thanks', 'Great Client' the system will not read your message.

If you send your times through more than an hour after your finish time (or more than an hour before your finish time) then once again, the system will not automatically lock off your shift.

So with your mobile phone, online or a combination of both, you now have the power to accept or decline work, lock off your shifts, view all of your employment details, upload any relevant documents or certification and enter your unavailability.

## **ICAL – Internet Calendar Subscription (Outlook, Google, Ical Calendars)**

### **Personal Details > Ical 2.0 Icon C**

Staff members can create a subscription directly from their Crew Login Page of the Personnel Manager to Internet Calendars such as Apple iCal, Outlook Calendar or Google Calendar to display their Shifts in their Calendar.

You must log into your Crew Page and see the little iCal icon. Right click on this Icon and Copy the Link, then follow the instructions below:

### **Instructions for “how to display your shifts in your ICAL”:**

Right Click on the ICAL 2.0 Icon on your Crew Member Details Page, select Copy Link (to copy the URL).

In your ICAL click Calendar then Subscribe and paste the URL after the words Calendar URL.

Select Auto Refresh every 5 mins and Save.

### **Instructions for “how to display your shifts in your OUTLOOK Calendar”:**

Right Click on the ICAL 2.0 Icon on your Crew Member Details Page, select Copy Link (to copy the URL)

In OUTLOOK select the Calendar then Open Calendar, select From Internet then paste the URL when prompted.

Your Outlook Calendar will now automatically download your Upcoming Shifts from Personnel Manager.

*It is suggested that the instructions above is copied and pasted into the Crew Message text box of the Global Settings Page in Admin Access.*

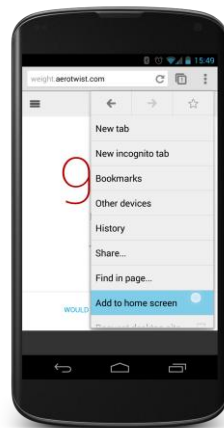
Now staff members will be able to see all of their Upcoming Shifts in their Internet Calendar. If a Google map is associated with the Meeting Place of the Venue, then a link for this map will appear in the calendar entry. In this way a staff member can use their Calendar to see all of their shifts and navigate to the exact location of work site.

## **CREW APP**

You can set up your web app to have an application shortcut icon added to a device's home screen, and have the app launch in full-screen "app mode" using Chrome for Android's "Add to home screen" menu item.

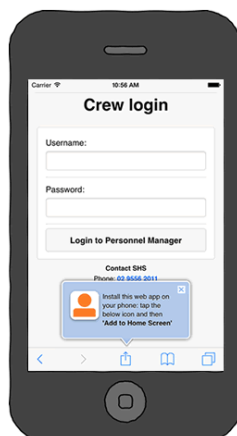
### **How to add Crew App to Homepage Android:**

Select Add to Home screen >



### **How to add Crew App to Homepage iPhone:**

iPhone users are prompted to add the app to home screen and open in web app when they first open the crew app.

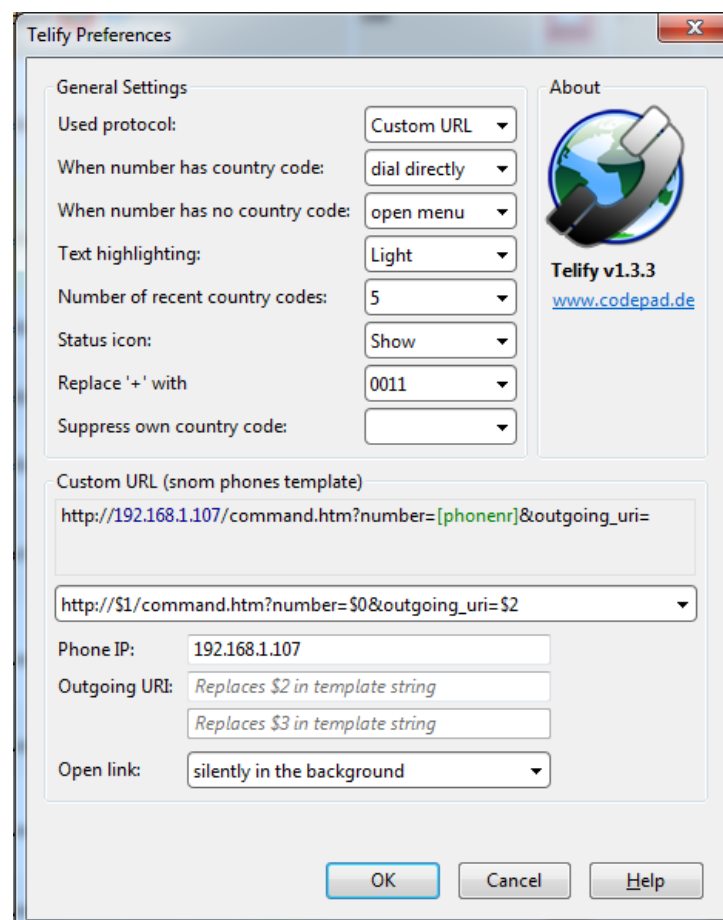


# TELIFY ADD-ON TO CALL OUT FROM PM USING VOIP ON SNOM PHONES

To make PM call out from the Shifts Page on your Snom 720 VOIP phone you should do the following and it only works in Mozilla Firefox web browsers.

**Get the Add On for Mozilla called TELIFY:** In the top left of the screen in your browser, click FIREFOX and then click ADD ONS. Now search for TELIFY

Then configure the following settings: FIREFOX (Top Left of Screen) > TELIFY > PREFERENCES



Under Custom URL, there is actually a selection for SNOM PHONES TEMPLATE, you will see it in the drop down box under Custom URL

With the setting, Phone IP, it will be different for your phone.

On the right hand side of the phone, near the bottom, you will see Menu > Option 6 Information (TICK – Left of big silver circle)> Option 2 System Info (TICK – Left of big silver circle) – Here you will find your phone's IP Address and this is what you enter into the Telify Preferences for your phone.

A window will pop up asking for your username and password when you 1<sup>st</sup> attempt to dial a number by clicking on it in the Shifts Page of PM (a little window will appear with a couple of options, just click the phone number again).

The Username will be – admin

The Password will be one of the following – telegate OR Telegate OR Password OR password

Now when you click a number in the Shifts Page of PM, it will call out from your Snom 720 automatically.