sage

Live Services – Rota System
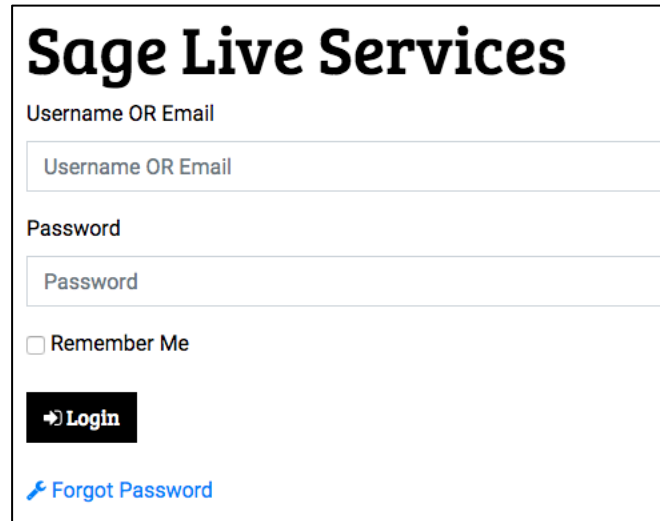
Staff Help Guide

Get started

Log into the system

1. Go to *http://test.creativenet.me.uk/sage2/usersc/login.php*.

2. Enter your **username** or **email address**.
3. Enter your **password**.
4. Click on **Login**.

Please note that you can tick the **Remember Me** checkbox, so your browser remembers your credentials.

Reset your password

1. Click on the **Forgot Password** at the bottom of the page.
   or
1. Click on **Help** and **Forgot Password** in the navigation bar.
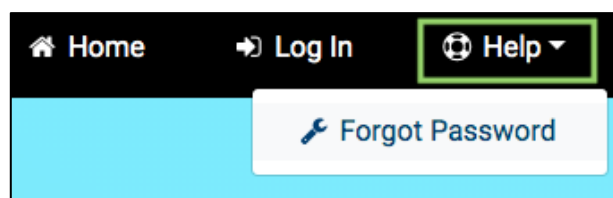
2. *Type your email address.*

Reset Password

1. Enter your email address and click Reset
2. Check your email and click the link that is sent to you.
3. Follow the on screen instructions

Email

Email

Reset

3. *Click on* **Reset** *at the bottom.*
4. *Check your mailbox for a password reset email.*
5. *Open the email and click on the link provided.*
6. *Follow the on-screen instructions to create a new password.*

Schedule

Access rota

The rota appears on your homepage. So, this is what you will see when logging in. Your shifts will appear on the calendar.

If you are on a different page of the system, you can always go back to the rota by clicking on the **Home** link in the navigation bar.

Navigate through the calendar

The arrows on the top left can be used to navigate through the calendar.

- The double arrows take you to the same month but in the previous or following year.
- The single arrows take you to the previous or following month.

The *Today* button allows you to get back to the current date not matter where you are in the calendar.
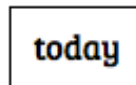
today

Please note that today's date appears in yellow in the calendar.

	Fri		Sat	
30		1		2
7		8		9

The default view of the calendar is by month, but it can be changed to week or day using the buttons in the top right.

month | week | day

View shift details

1. Click on the Home button in the navigation bar, if you are not already on your homepage.

🏠 Home   ☑ Shift Preferences   🔄 Shift Swaps   📋 Shift Notes   👤 staff1   ⚙ ▾
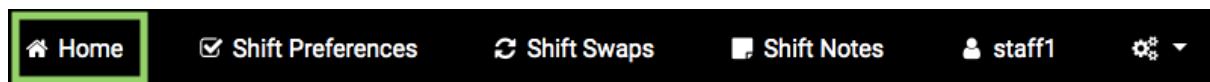
2. Click on the shift you would like to view.

17	18	19	20	21	22
James Bradford					

3. *This page displays the start and end dates of the shift and any notes the manager has provided.*

Shift Details

James Bradford
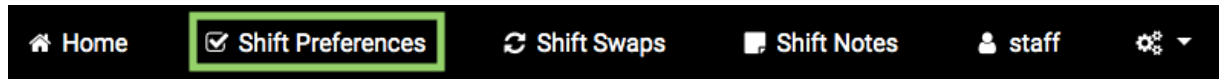
Start Date

05/18/2020

End Date

05/24/2020

Notes

Back

Shift preferences

View your shift preferences
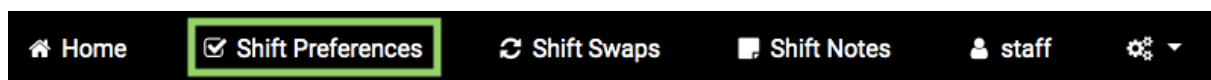
1. Click on **Shift Preferences** in the navigation bar.

| 🏠 Home | ☑ Shift Preferences | ⟳ Shift Swaps | 🗎 Shift Notes | 👤 staff | ⚙ ▾ |

2. This page displays the lists of your shift preferences.

Shift Preferences

+ Create Preference

Start Date	End Date	
2020-04-15	2020-04-18	Remove
2020-04-01	2020-04-03	Remove
2020-04-11	2020-04-01	Remove

Create a shift preference

1. Click on **Shift Preferences** in the navigation bar.

| 🏠 Home | ☑ Shift Preferences | ⟳ Shift Swaps | 🗎 Shift Notes | 👤 staff | ⚙ ▾ |
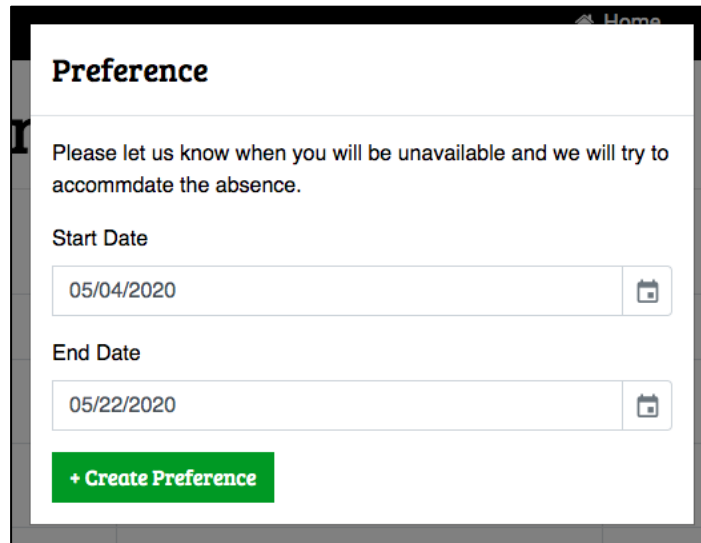
2. Click on the **Create Preference** button.

Shift Preferences
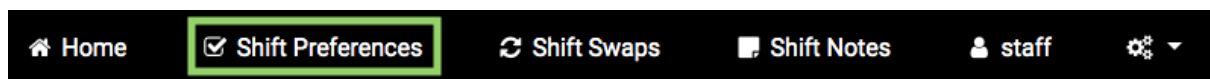
+ Create Preference

3. Pick a *start date* and an *end date* using the date picker.

4. Click on *Create Preference* to save it.

Remove a shift preference

1. Click on *Shift Preferences* in the navigation bar.

2. Click on the *Remove* button, located on the same line as the shift preference to delete.
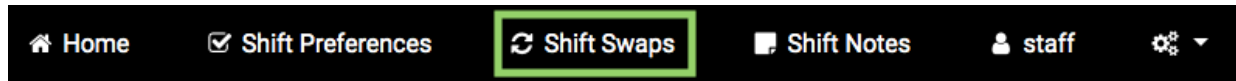

3. Your shift preference disappears from the list.

Shift swaps

View shift swaps

1. Click on **Shift Swaps** in the navigation bar.

2. This page displays the lists of requests you have created, the other open requests and the completed requests.

Create a shift swap

1. Click on **Shift Swaps** in the navigation bar.

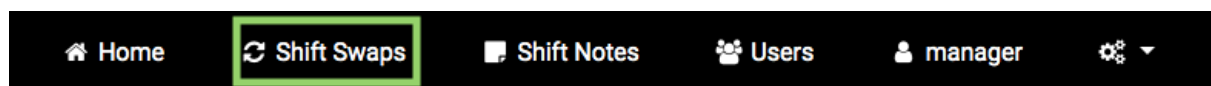2. Click on the **New Swap** button.
3. Select a shift in the dropdown.

4. Click on *Create Request*.
5. A banner will appear at the top of the page to confirm this change. Close the banner by clicking the cross on the right.

Accept a shift swap

1. Click on *Shift Swaps* in the navigation bar.

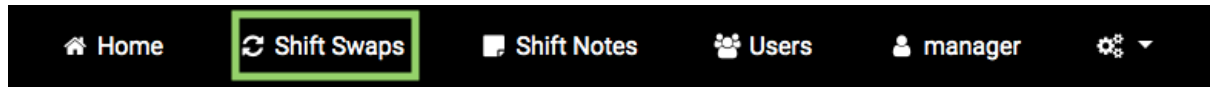2. Click on the *Accept* button, located next to the shift you want to take.

3. A banner will appear at the top of the page to confirm this change. Close the banner by clicking the cross on the right.

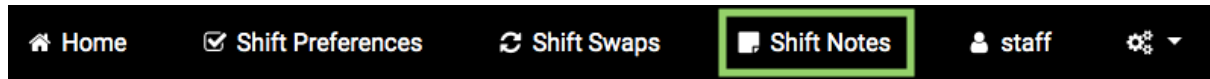## Cancel a shift swap request

4. Click on **Shift Swaps** in the navigation bar.

5. Click on the **Cancel** button, located on the line of the swap request to cancel.

Shift notes

View your shift notes

1. Click on **Shift Notes** in the navigation bar.

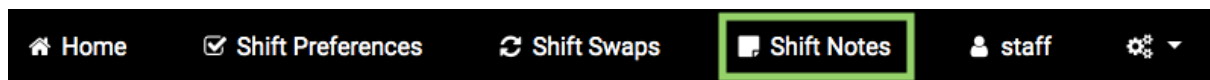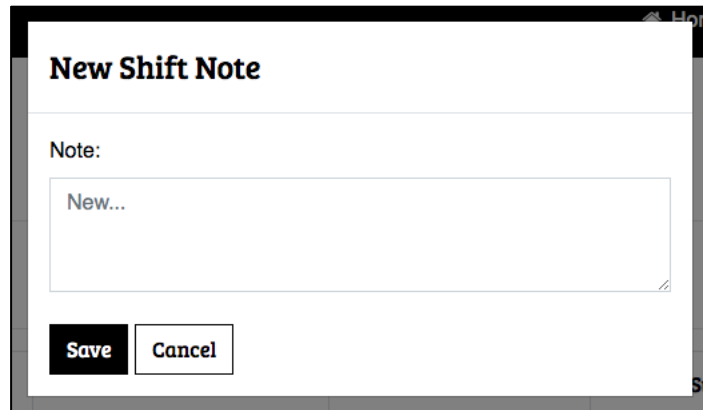2. This page displays your shift notes saved in the system.

Create a shift note

1. Click on **Shift Notes** in the navigation bar.

2. Click on the **Add Note** button.

3. *Type your note in the text box.*
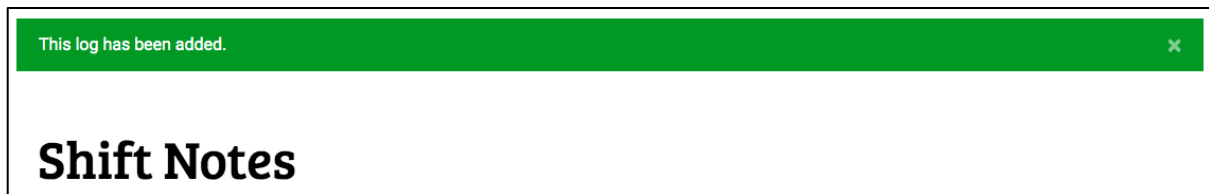

4. *Click on **Save**.*
5. *A banner will appear at the top of the page to confirm the creation of the note. Close the banner by clicking the cross on the right.*

Edit a shift note

1. *Click on **Shift Notes** in the navigation bar.*
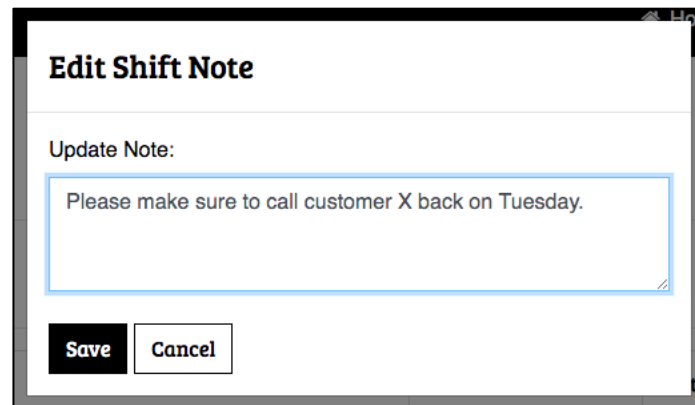
2. *Click on the pencil icon in the **Edit** column, located on the same line as the note to edit.*
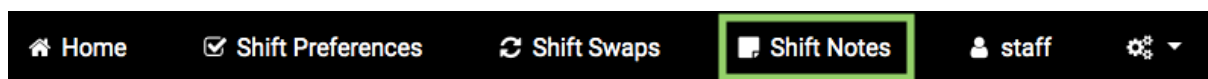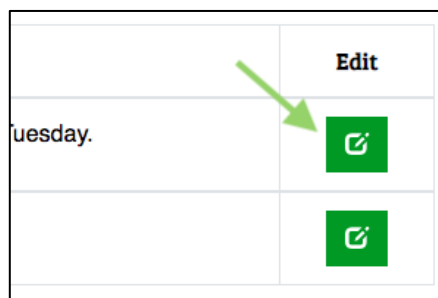
3. *Type up your note in the text box.*

4. *Click on **Save**.*
5. *A banner will appear at the top of the page to confirm the modification of the note. Close the banner by clicking the cross on the right.*

Account information

View account details

1. Click on the **Settings** icon in the top right corner of the page.
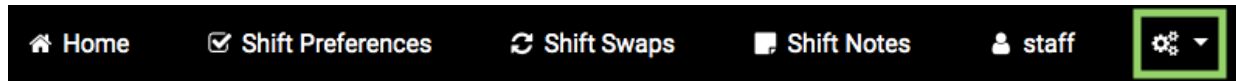
2. Click on **Account**.

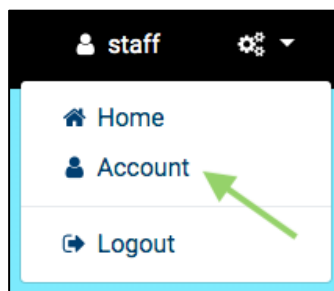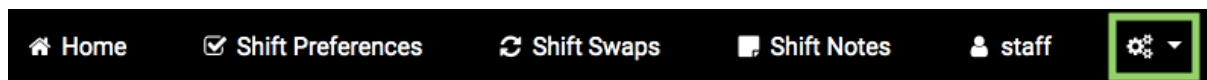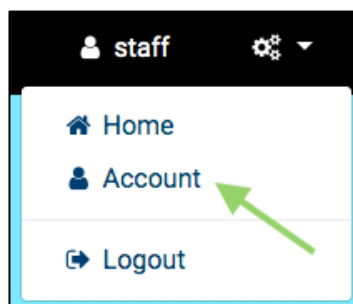3. On this page, you can see your username, name, picture, when your account was created and the number of times you have logged into your account.

Edit account information

1. Click on the **Settings** icon in the top right corner of the page.

2. Click on **Account**.

3. Click on the **Edit Account** Info button.

4. Edit the fields you wish to change. Please note that you cannot change your username.

Update your user settings

Want to change your profile picture?
Visit https://en.gravatar.com/ and setup an account with the same email you used on this site.It works across millions of sites.
It's fast and easy!

Username

| staff | Why can't I change this? |

First Name

Some

Last Name

Staff

Email

some.staff@sage.com

Confirm Email

New Password

👁   ?

Confirm Password

👁   ?

Old Password, required for changing password, email, or resetting PIN

👁   ?

Update

5. Click on the **Update** button at the bottom of the page.

6. *A banner appears at the top of the page to confirm which fields were updated.*

Update your user settings

Want to change your profile picture?
Visit https://en.gravatar.com/ and setup an account with the same email you used on this site. It works across millions of sites. It's fast and easy!

- First Name Updated