

Live Services - Rota System

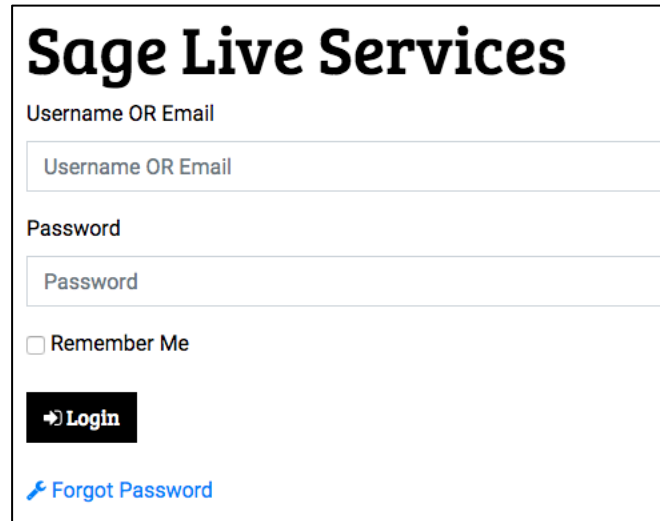
Staff Help Guide

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Get started

Log into the system

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



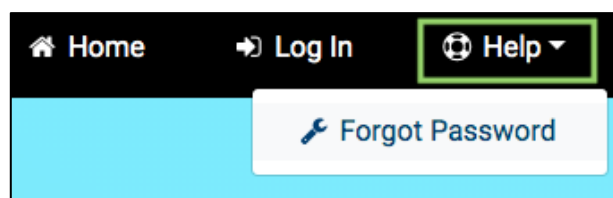
The screenshot shows the 'Sage Live Services' login interface. It features a title 'Sage Live Services' at the top. Below the title are two input fields: 'Username OR Email' and 'Password'. A checkbox labeled 'Remember Me' is positioned below the password field. At the bottom of the form is a black 'Login' button with a right-pointing arrow icon. Below the button is a blue link labeled 'Forgot Password' with a key icon.

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

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.

Employee Area						
<div> <div> <div><<</div> <div><</div> <div>></div> <div>>></div> </div> <div>today</div> <div>May 2020</div> <div> <div>month</div> <div>week</div> <div>day</div> </div> </div>						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
	James Bradford					

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.

 Home	 Shift Preferences	 Shift Swaps	 Shift Notes	 staff1	
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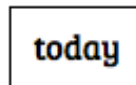
Navigate through the calendar

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.



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

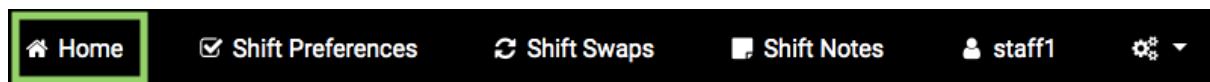
	Fri	Sat
30	1	2
7	8	9

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.



View shift details

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



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

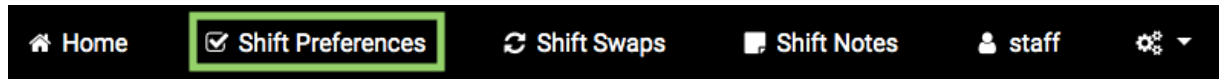
Notes

[Back](#)

Shift preferences

View your shift preferences

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

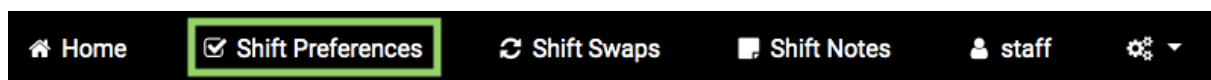


2. This page displays the lists of your shift preferences.

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

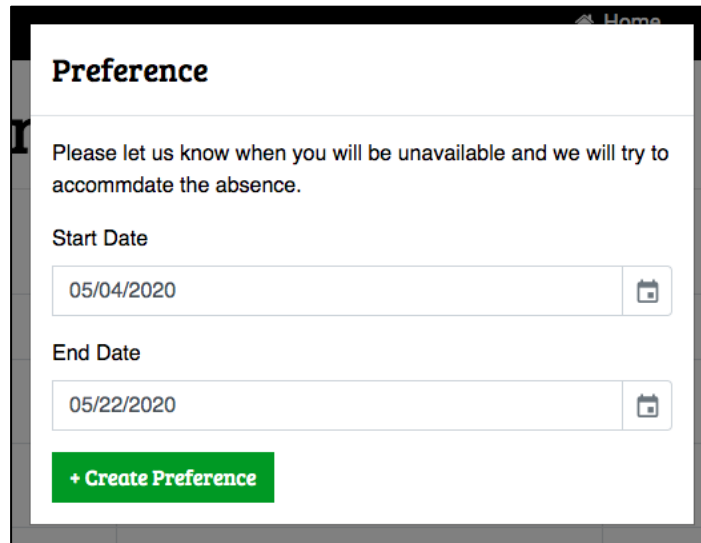
1. Click on **Shift Preferences** in the navigation bar.



2. Click on the **Create Preference** button.



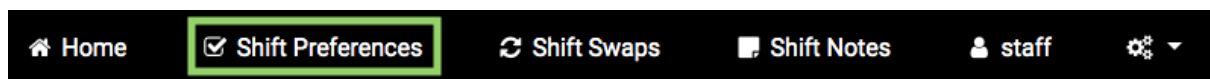
3. Pick a *start date* and an *end date* using the date picker.




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.

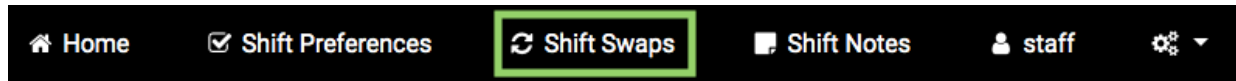
Date	
-04-18	 Remove
-04-03	Remove

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.

Shift Swaps

+ Create Swap

Start Date	End Date	Status	
2020-09-21	2020-09-27	Open	Cancel

Start Date	End Date	
2020-05-04	2020-05-10	Accept
2020-05-25	2020-05-31	Accept

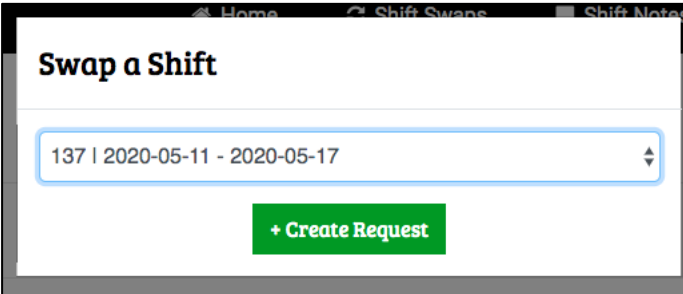
Start Date	End Date
2020-06-29	2020-07-05

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.



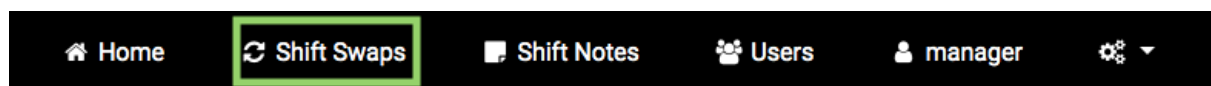
4. Click on **Create Request**.
5. A banner will appear at the top of the page to confirm this change. Close the banner by clicking the cross on the right.

Swap successfully created
×


Shift Swaps

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.

Start Date	End Date	
2020-05-04	2020-05-10	 Accept
2020-05-25	2020-05-31	Accept

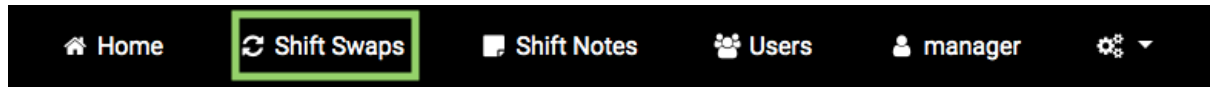
3. A banner will appear at the top of the page to confirm this change. Close the banner by clicking the cross on the right.

Swap successfully accepted
×

Shift Swaps

Cancel a shift swap request

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



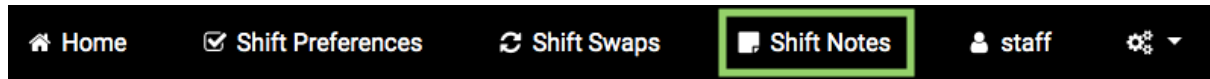
- Click on the *Cancel* button, located on the line of the swap request to cancel.

Status	
Open	 Cancel
Open	Cancel

Shift notes

View your shift notes

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

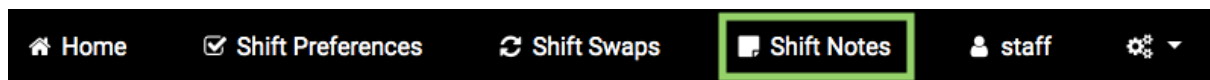


2. This page displays your shift notes saved in the system.

Shift Notes			
+ Add Note			
ID	Last Updated	Note	Edit
1	2020-05-01 17:43:38	Please make sure to call customer X back on Tuesday.	✎
3	2020-05-01 19:37:10	System Y had a P0 at 2pm.	✎

Create a shift note

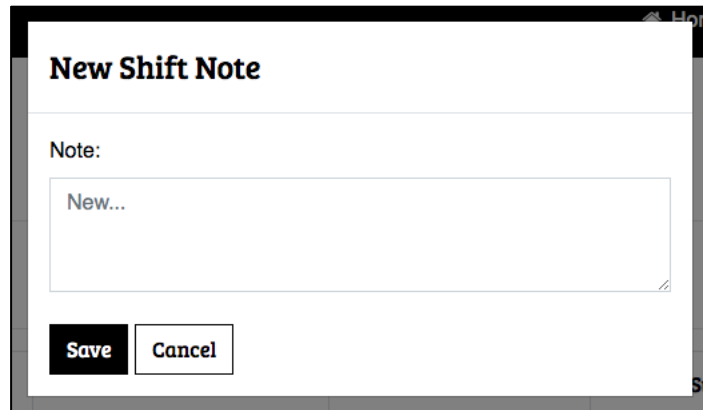
1. Click on **Shift Notes** in the navigation bar.



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

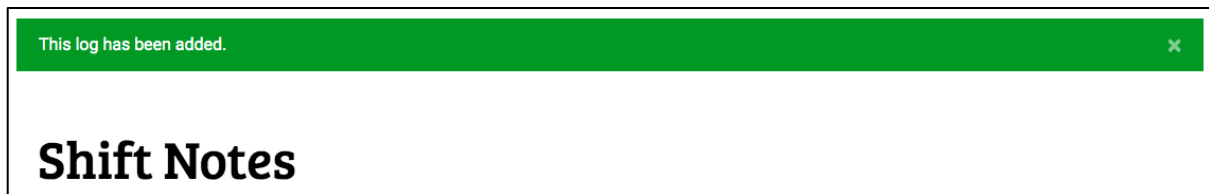


3. Type your note in the text box.



A dialog box titled "New Shift Note" with a "Note:" label and a text input field containing "New...". At the bottom are "Save" and "Cancel" buttons.

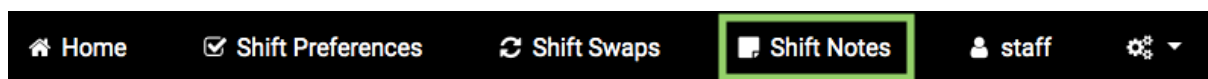
4. Click on **Save**.
5. A banner will appear at the top of the page to confirm the creation of the note. Close the banner by clicking the cross on the right.



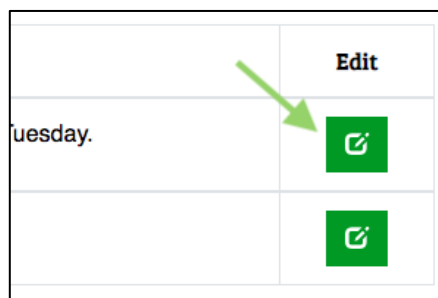
A green banner at the top says "This log has been added." with a close button (X). Below it is the heading "Shift Notes".

Edit a shift note



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



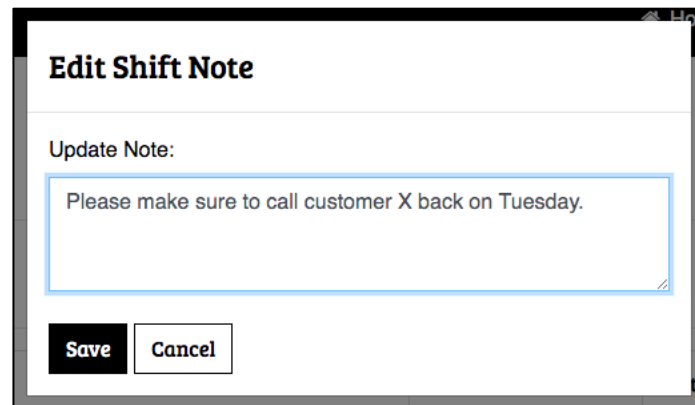
2. Click on the pencil icon in the **Edit** column, located on the same line as the note to edit.



A table with two columns. The first column contains the text "uesday." and the second column is labeled "Edit". A green arrow points to a pencil icon in the "Edit" column, which is highlighted with a green box.

	Edit
uesday.	
	

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



Edit Shift Note

Update Note:

Please make sure to call customer X back on Tuesday.

Save **Cancel**

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.*

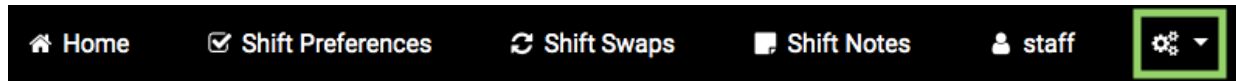
This log was successfully updated. ×

Shift Notes

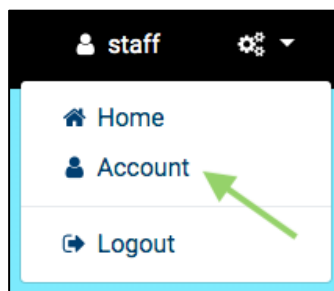
Account information

View account details

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



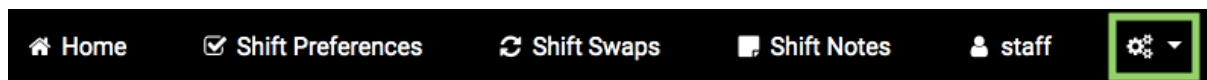
2. Click on **Account**.



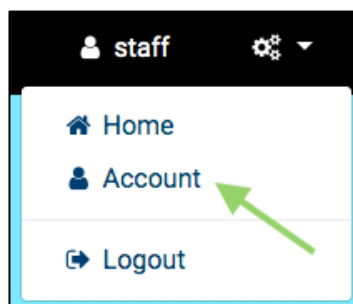
3. On this page, you can see your username, name, picture, when your account was created and the number of times you have logged into your account.

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

Why can't I change this?

First Name

Last Name

Email

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