sage

Live Services – Rota System
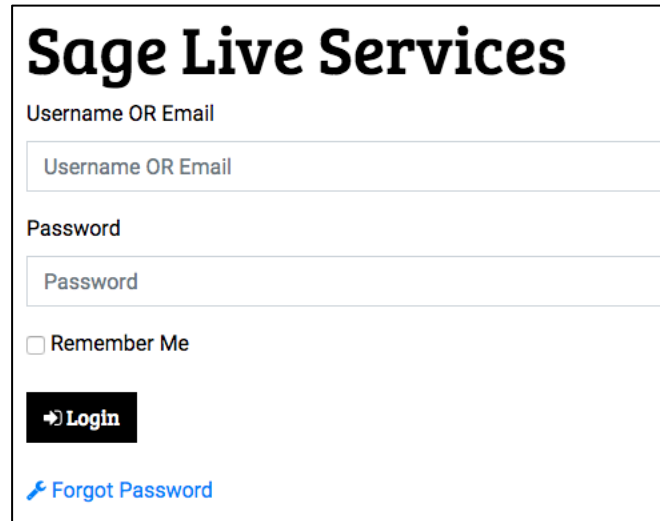
Manager Help Guide

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.
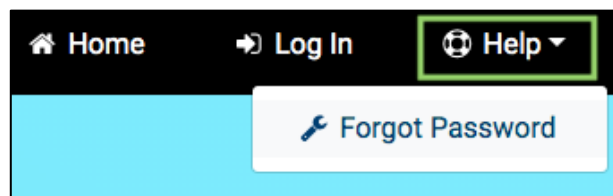
2. *Type your email address.*

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. All staff 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.
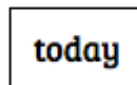
Navigate through the calendar

The arrows on the top left can be used to navigate through the calendar.
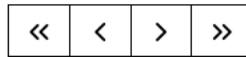
- The double arrows take you to the same month but in the previous or following year.
- The single arrows take you to the previous or following month.
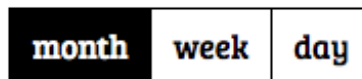
The **Today** button allows you to get back to the current date not matter where you are in the calendar.

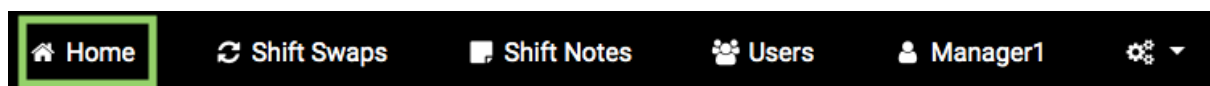Please note that today's date appears in yellow in the calendar.

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.
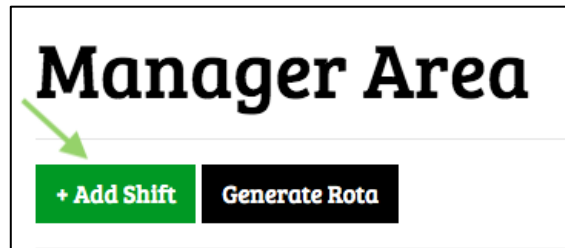

Add a shift

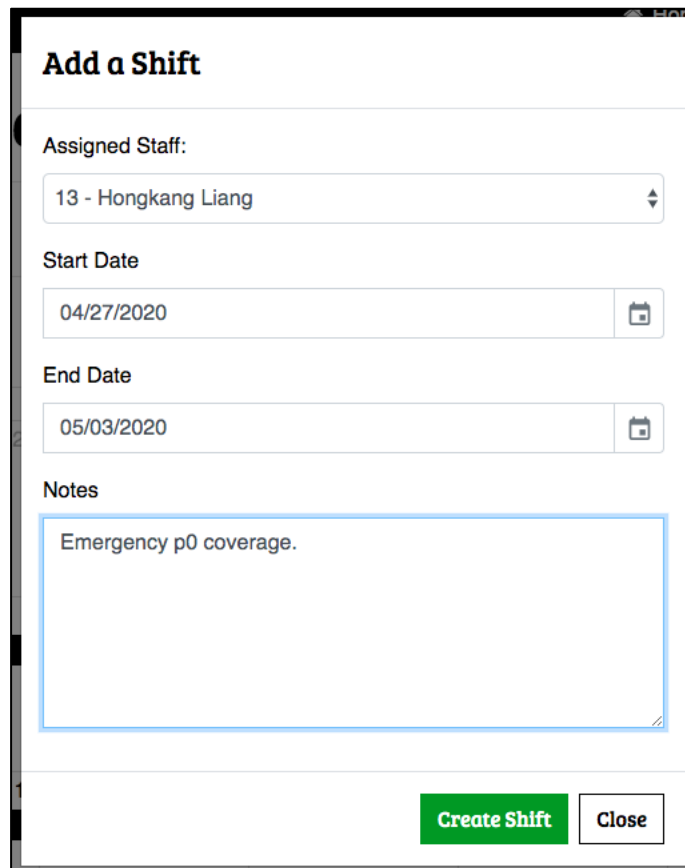1. Click on the **Home** button in the navigation bar, if you are not already on your homepage.
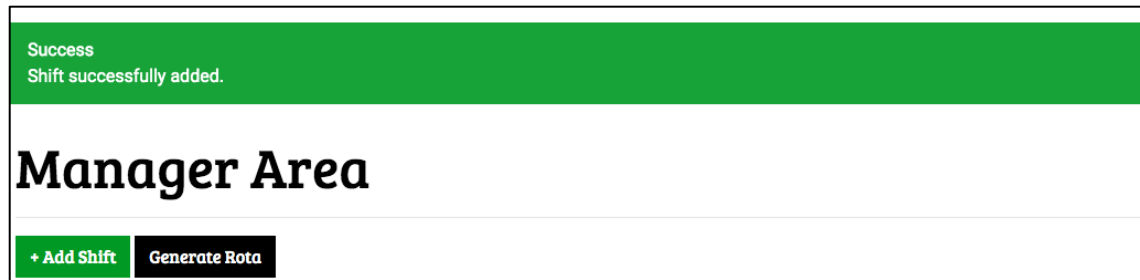
2. Click on the **Add Shift** button.

3. Pick a staff member using the dropdown, start and end dates using date picker and type any necessary notes.


4. Click **Create Shift**.

5. A banner will temporarily appear at the top of the page confirming the creation of a shift.


Generate the rota

The rota is automatically generated once a month, meaning that the staff always have their shifts 6 months in advance. If you do not wish to wait until the schedule is generated, you can trigger this process by following the steps below.

1. Click on the **Home** button in the navigation bar, if you are not already on your homepage.
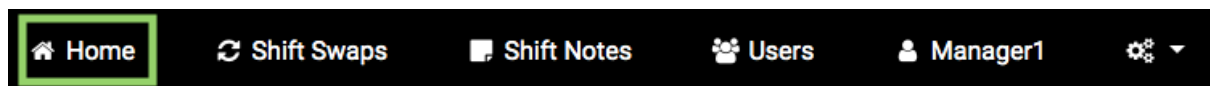
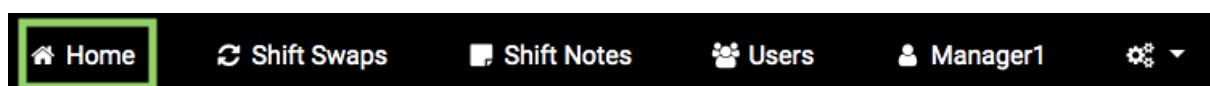2. Click on the **Generate Rota** button.
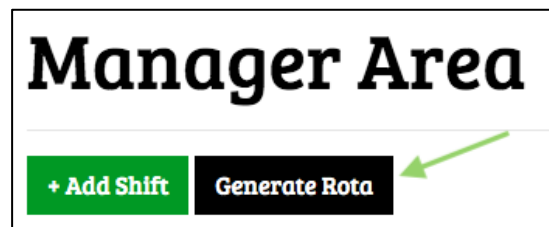
3. The page will refresh, and you will be able to access the next set of shifts.

Please note that this process will only work with a minimum of 6 staff on the system.

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.*

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

Shift Details

Reassign Shift **Delete Shift**

Stef Gomes

Start Date

05/11/2020

End Date

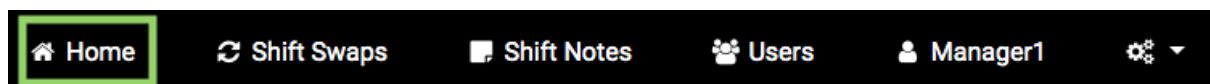05/17/2020

Notes

Back   **Confirm**

Edit a shift

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

🏠 Home   ↻ Shift Swaps   📝 Shift Notes   👥 Users   👤 Manager1   ⚙ ▾

2. Click on the shift you would like to edit.

3. Edit the elements you want to change.
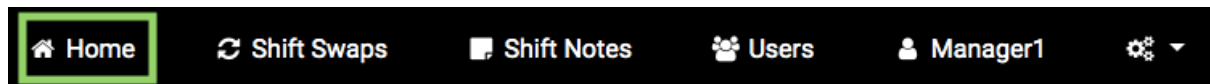

4. Click **Confirm**.

5. *A banner will temporarily appear at the top of the page confirming the shift was successfully updated.*

Success
Shift successfully updated.

Manager Area
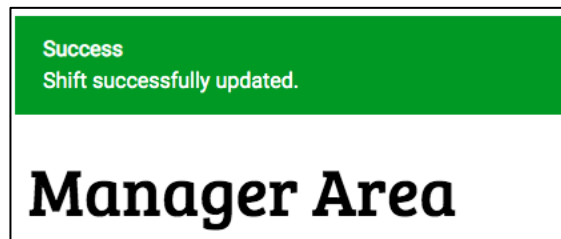
Reassign a shift

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

| 🏠 Home | 🔄 Shift Swaps | 🗐 Shift Notes | 👥 Users | 👤 Manager1 | ⚙️ ▾ |

2. *Click on the shift you would like to reassign.*

Manager Area

| + Add Shift | Generate Rota |

| « | ‹ | › | » | today | | **May 2020** | | month | week | day |

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
	Hongkang Liang					
3	4	5	6	7	8	9
Hongkang Liang	The Admin					

3. *Click on **Reassign Shift**.*

Shift Details

| Reassign Shift | Delete Shift |

4. *Pick another member of staff in the dropdown.*

5. *Click on **Confirm**.*
6. *A banner will temporarily appear at the top of the page confirming the shift was successfully reassigned.*
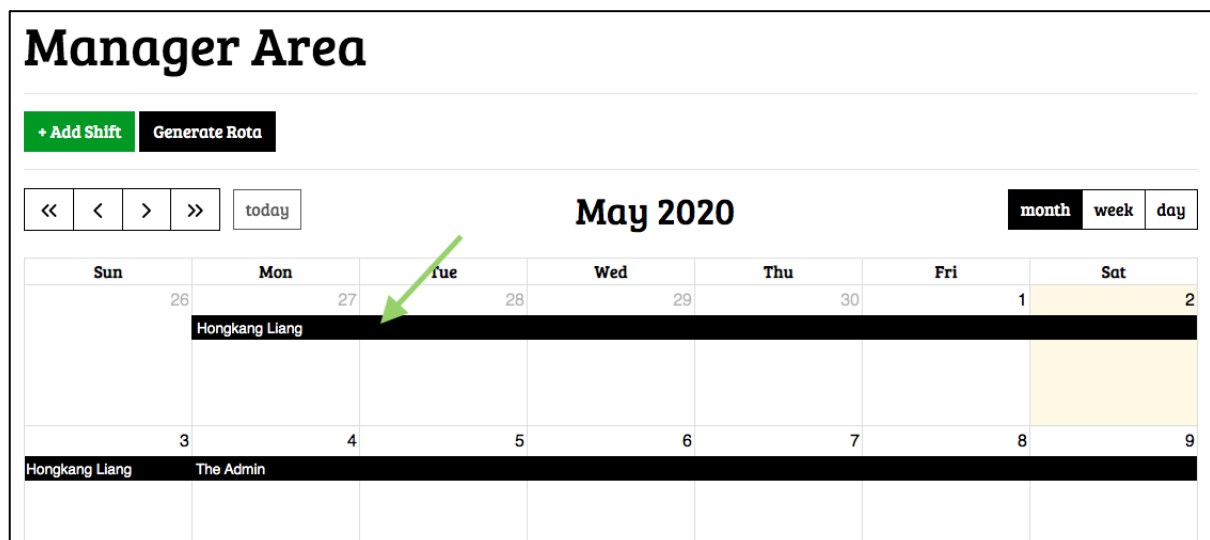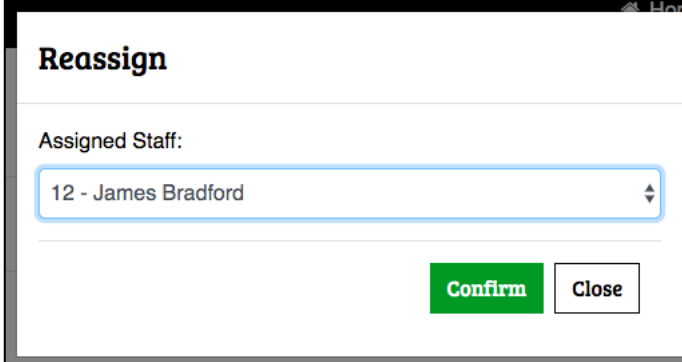

Delete a shift
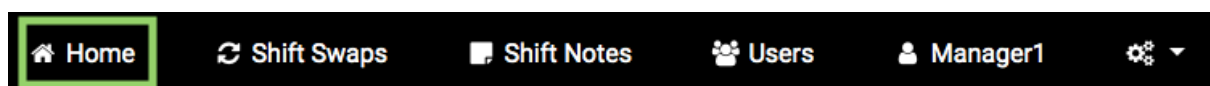
1. *Click on the **Home** button in the navigation bar, if you are not already on your homepage.*

2. *Click on the shift you would like to delete.*

3. Click on *Delete Shift*.

4. A prompt will appear to check that you wish to go ahead with this deletion. Click on *Confirm Deletion*. Please note that shift deletions are irreversible.
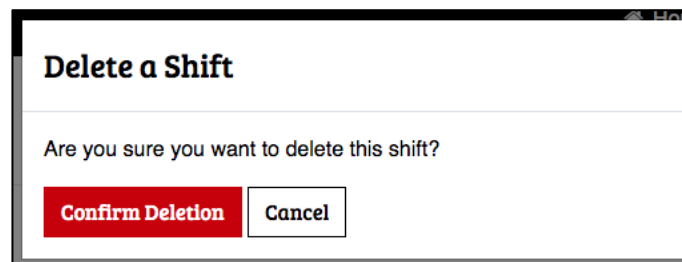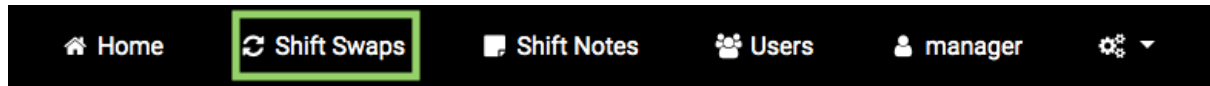

5. A banner will temporarily appear at the top of the page confirming the shift was successfully deleted.
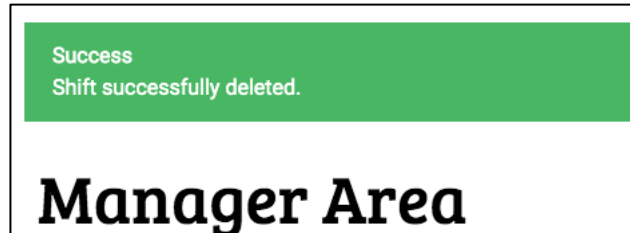
Shift swaps

View shift swaps

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

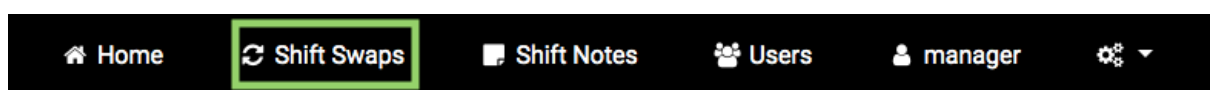2. This page displays the lists of ongoing and completed requests.
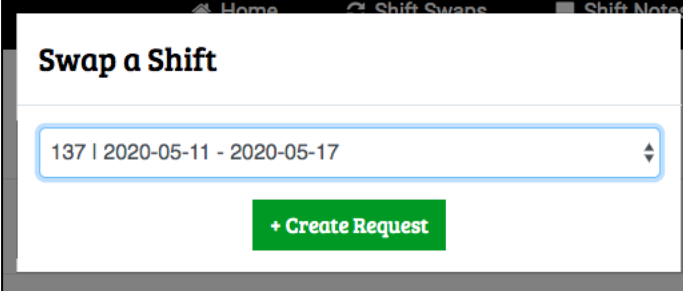

Create a shift swap

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

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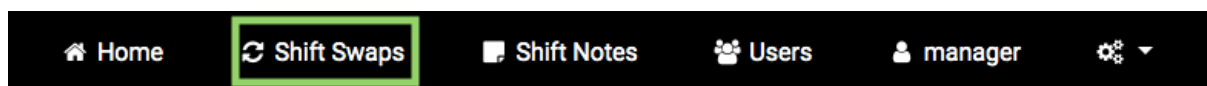
3. *Select a shift in the dropdown.*

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.*

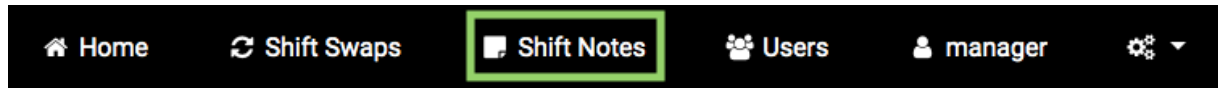## Cancel a shift swap request

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

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

Shift notes

View shift notes

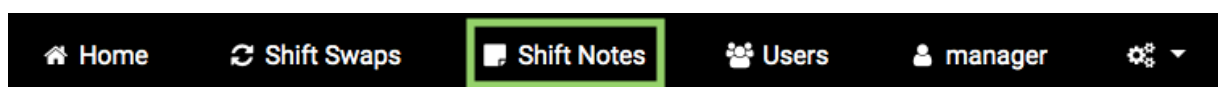1. Click on **Shift Notes** in the navigation bar.

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

Shift Notes

+ Add Note

| ID	Last Updated	Note	Staff First Name	Staff Surname	Edit	Delete
1	2020-04-24 09:04:06	haha	Some	Staff		
3	2020-04-24 09:04:24	id	Some	Staff		
4	0000-00-00 00:00:00	Shift 3 updated	Some	Manager		
5	0000-00-00 00:00:00	Shift 9 updated	Some	Manager		
6	0000-00-00 00:00:00	Shift 11 updated	Some	Manager		
7	2020-04-30 08:17:32	Testing	Hongkang	Liang		
8	2020-04-30 08:18:33	Testing-staff3	James	Bradford		
9	0000-00-00 00:00:00	Shift 15 reassigned	Some	Manager		

Create a shift note

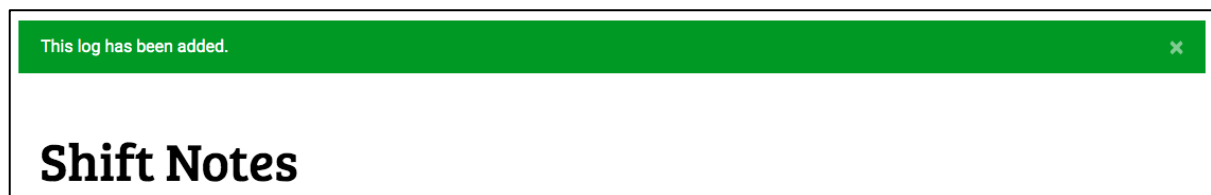1. Click on **Shift Notes** in the navigation bar.

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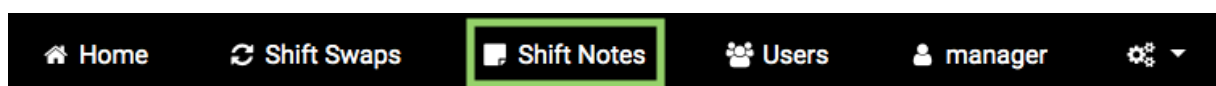

3. Type your note in the text box.
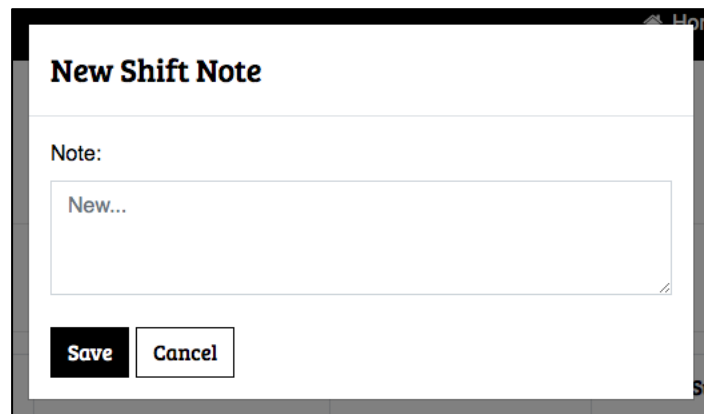
4. Click on **Save**.
5. A banner will appear at the top of the page to confirm the creation of the note. Close the banner by clicking the cross on the right.

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.

Delete a shift note

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

2. *Click on the trash icon in the **Delete** column, located on the same line as the user to delete.*

3. *A prompt will appear to check that you wish to go ahead with this deletion.*
   *Click on **Confirm Deletion**. Please note that note deletions are irreversible.*

4. *A banner will appear at the top of the page to confirm the deletion. Close the banner by clicking the cross on the right.*
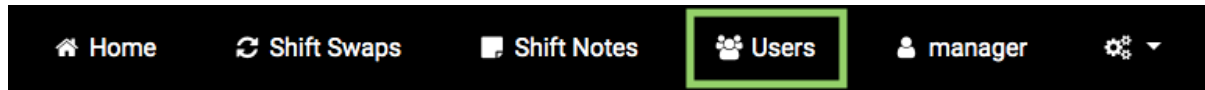
User management

View the list of staff

1. Click on **Users** in the navigation bar.

2. This page displays the list of staff on the system.

User Management

+ Add Staff

| User ID	Username	First name	Last name	Email address	Creation date	Last logged in	Edit	Delete
1	admin	The	Admin	userspicephp@userspice.com	2016-01-01	2020-04-29 10:21:20		
2	user	Sample	User	noreply@userspice.com	2016-01-02	2017-10-08 15:47:41		
12	staff	Some	Staff	some.staff@sage.com	2020-04-21	2020-05-01 16:49:41		
13	staff1	Ziyang	He	b9045786@newcastle.ac.uk	2020-04-24	2020-04-24 00:06:40		
14	staff2	Hongkang	Liang	staff2@gmail.com	2020-04-30	2020-04-30 09:19:16		
15	staff3	James	Bradford	staff3@gmail.com	2020-04-30	2020-04-30 09:18:09		
17	staff5	Dale	Cooper	staff5@gmail.com	2020-05-01	Never		

Add staff

1. Click on **Users** in the navigation bar.
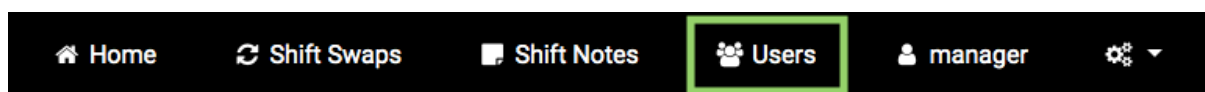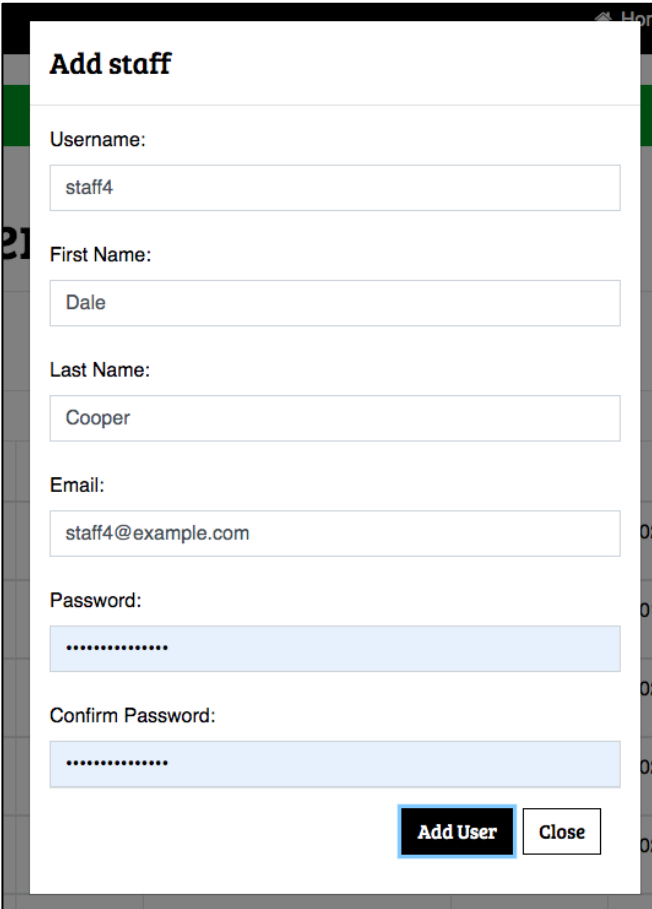
*2. Click on the **Add Staff** button.*

3. Fill in the details of the new staff member. Please note that the username will need to be unique.

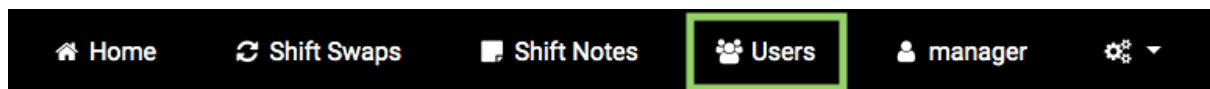*4. Click on the **Add User** button.*

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

This employee has been added.   ✕

User Management

Edit staff

1. *Click on **Users** in the navigation bar.*

🏠 Home   🔁 Shift Swaps   🗐 Shift Notes   👥 Users   👤 manager   ⚙️ ▾

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

Last logged in	Edit	Delete
2020-04-29 10:21:20	✏️	🗑️
2017-10-08 15:47:41	✏️	🗑️

3. *Fill in the fields you wish to modify.*

Edit staff

All fields are required.

First Name:

The

Last Name:

Admin

Email:

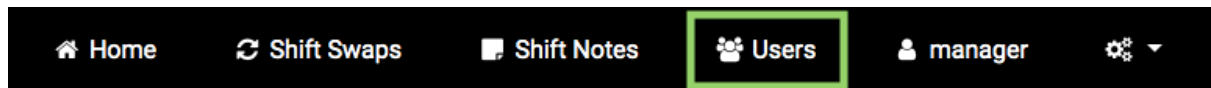userspicephp@userspice.com

Save   Cancel

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

Delete staff

1. *Click on **Users** in the navigation bar.*

2. *Click on the trash icon in the **Delete** column, located on the same line as the user to delete.*

3. *A prompt will appear to check that you wish to go ahead with this deletion. Click on **Confirm Deletion**. Please note that user deletions are irreversible.*

4. *A banner will appear at the top of the page to confirm the deletion. Close the banner by clicking the cross on the right.*

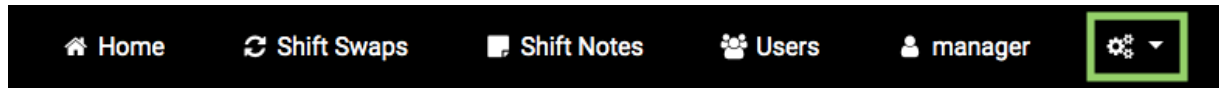This employee has been deleted.   ✖

User Management

Account information

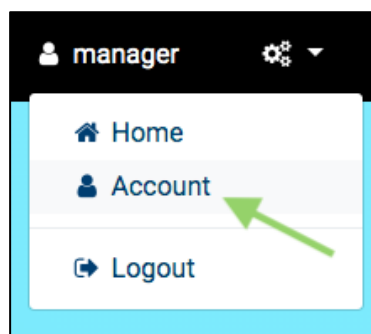## View account details

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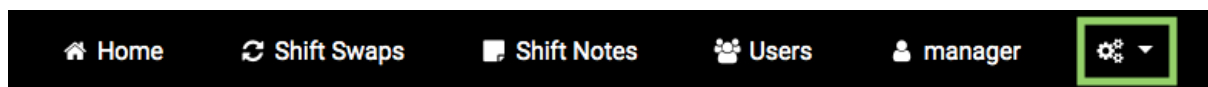

2. Click on **Account**.

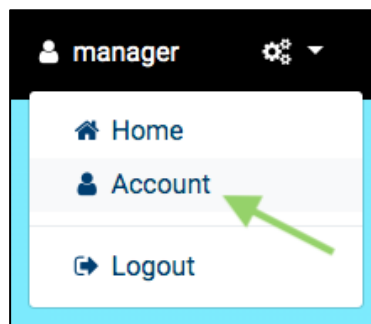
3. On this page, you can see your username, name, picture, when your account was created and the number of times you have logged into your account.

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

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

First Name

| Some |

Last Name

| Manager |

Email

| some.manager@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