INTEGRATED SECURITY SERVICES

Operations Management Application

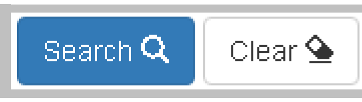
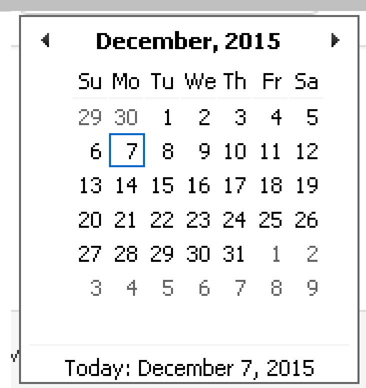
User Manual

Version 1.0

Contents

Controls

The following represents controls that are used to allow data entry/edit and search of records.

#	Name	How it looks
1	Label	
2	Text Box	
3	Buttons	
4	Date Button	
5	Drop down list	
6	Check box	
7	Radio button	
8	Calendar	

Alerts

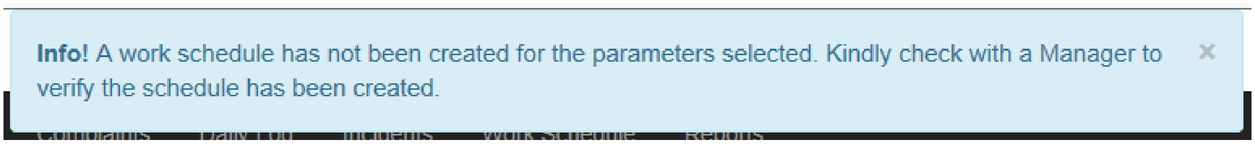
The application displays alerts or messages to inform the user on the status of the task they are performing. These include:

Success

Is displayed with a light green color and indicates the task initiated was completed successfully. For example, saving an Incident will show:

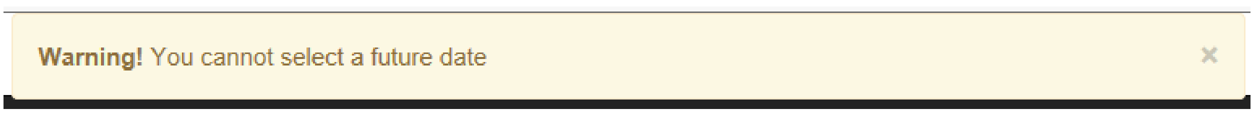
Information

Is displayed with a light blue color and gives information on the task being attempted. For example, creating a daily log for when the work schedule has not been completed:



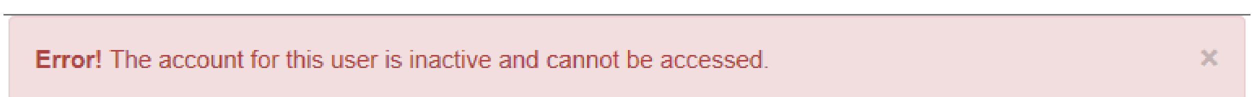
Warning

Is displayed with a light gold color and indicates that something you did or are doing is incorrect. For example selecting a date in the future will show:



Error

Is displayed with a red color and indicates that the task attempted was not completed successfully and should be retried. For example, a user trying to log into the application with an account that does not exist:



How to login

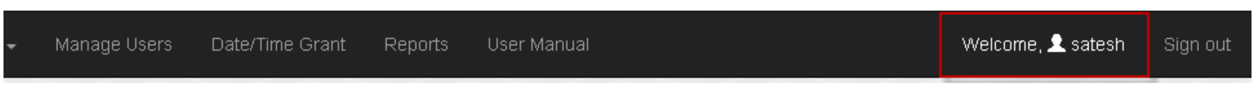
1. Enter your **User name**. The user name follows the format – Last Name and First letter of first name. E.g. Satesh Persaud's login would be **PersaudS**
2. Enter your **password**
3. Click on the **Sign In** button

Login Screen

Change Password

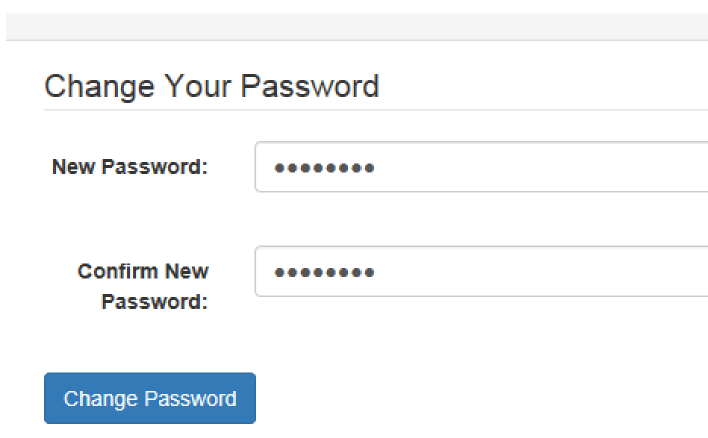
When you have to reset your password, follow the below steps:

1. Request for the administrator to reset your password or click on your name on the toolbar:



Link to reset password

2. If you clicked on your name, go to step 3 otherwise login to the application with the password given by the administrator
3. Enter your new password twice on the screen presented. The password must be greater than or equal to six characters.



Change password screen

Roles

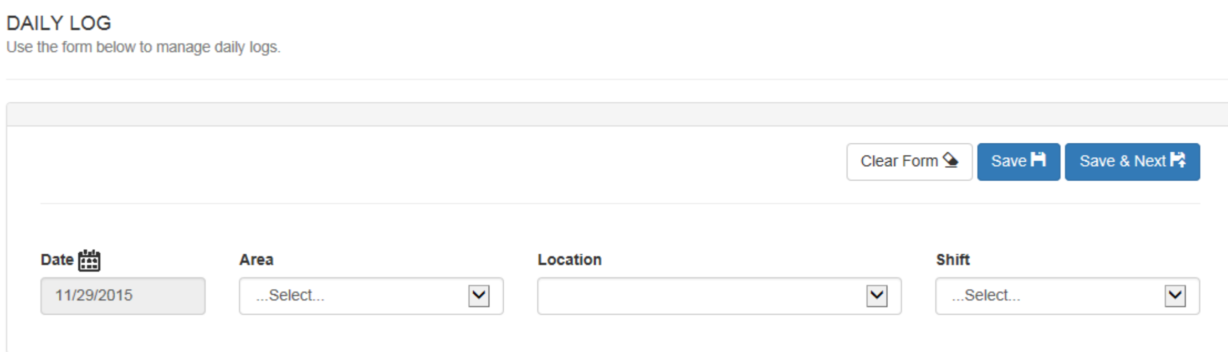
Users in the application are given roles based on the level of access required. These include:

1. Manager – Gets access to all modules of the application other than the Administrator module.
2. Operator – Gets access to the Operators' module.
3. Supervisor – Gets access to the Supervisors' module.
4. Compliance Officer – Gets access to the Incident and Complaint features of the Operators' module.
5. Administrator – Gets access to the Administrator module.

Operator

Daily Logs

This feature is only available to users that have the **Operator** or **Manager Role**.

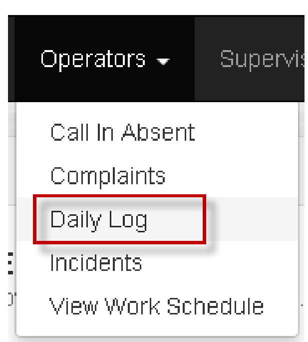


Daily Log Home Screen

Add New

To add a new daily log record, follow the below steps:

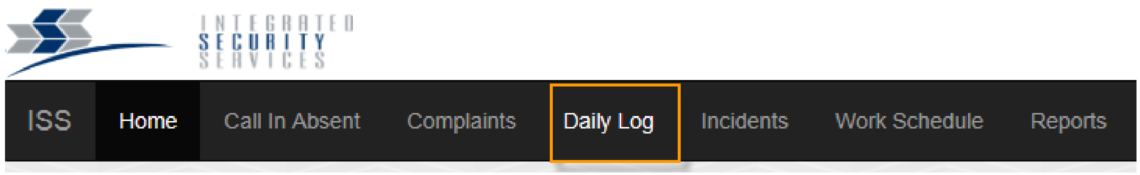
1. To access the data entry page:
    a. If you have the Manager Role, on the toolbar click **Operators** -> **Daily Log**



Manager accessing the Daily Logs page

i. On the page that is displayed, click on the **New Daily Log** button.

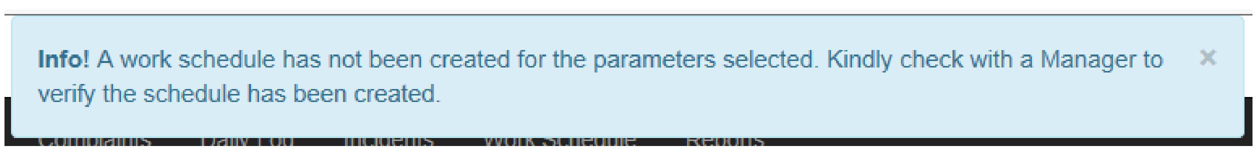
b. If you have the Operator role, click on the **Incidents** button on the toolbar.



Operator accessing the Daily Logs page

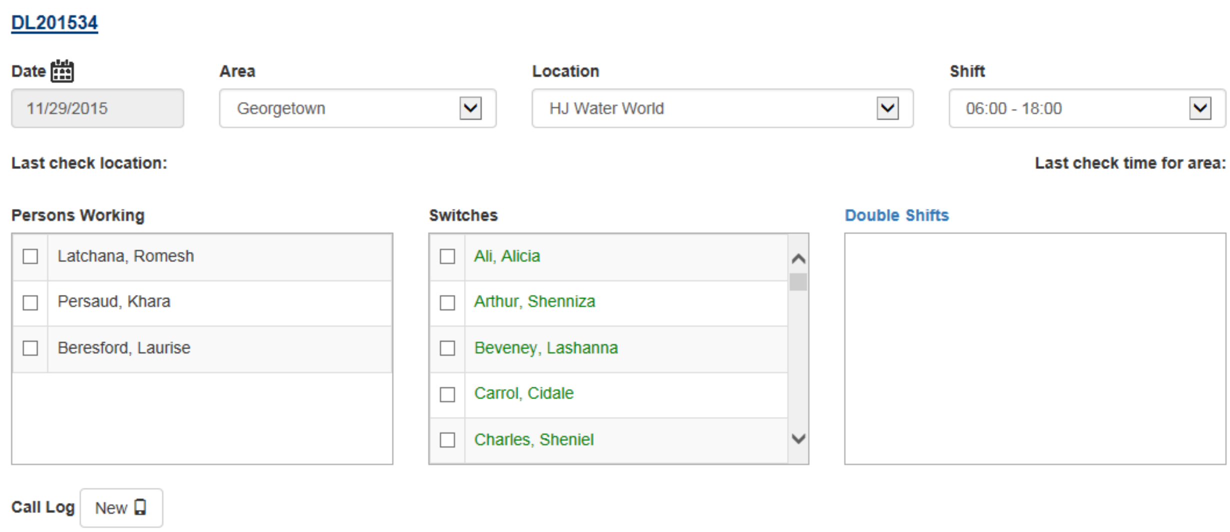
2. The report number is auto-generated.
3. The **Date** is auto-completed and set to the current day's date.
4. Selecting the following three fields will create a new log, if not already created. If the log for the current day has been created, it will be loaded.
    a. Select the **Area**.
    b. Select the **Location**.
    c. Select the **Shift**.
5. If the log is created successfully, the following alert will be displayed. This message is only displayed the first time the log is created:

6. If the work schedule has not been created, the following alert will be displayed:



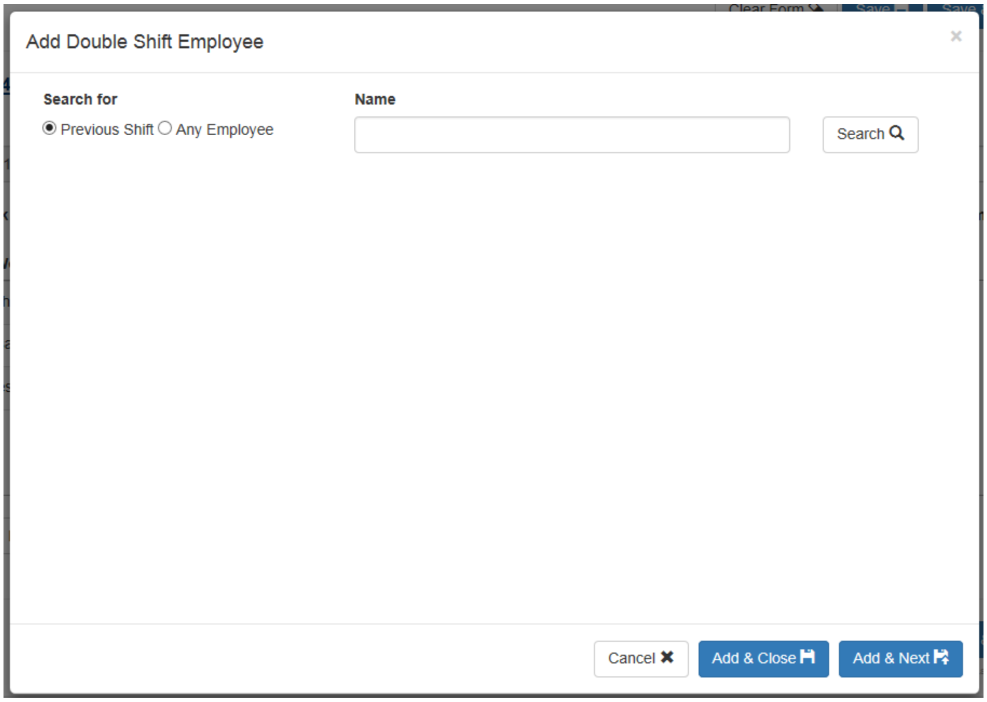
7. If attempting to load logs older than the current day, the following alert will be displayed. Older logs are only loaded if you have the **Manager** role or a **Date/Time Grant** is active.

8. The following form is displayed when a log is successfully created:



Daily Logs form

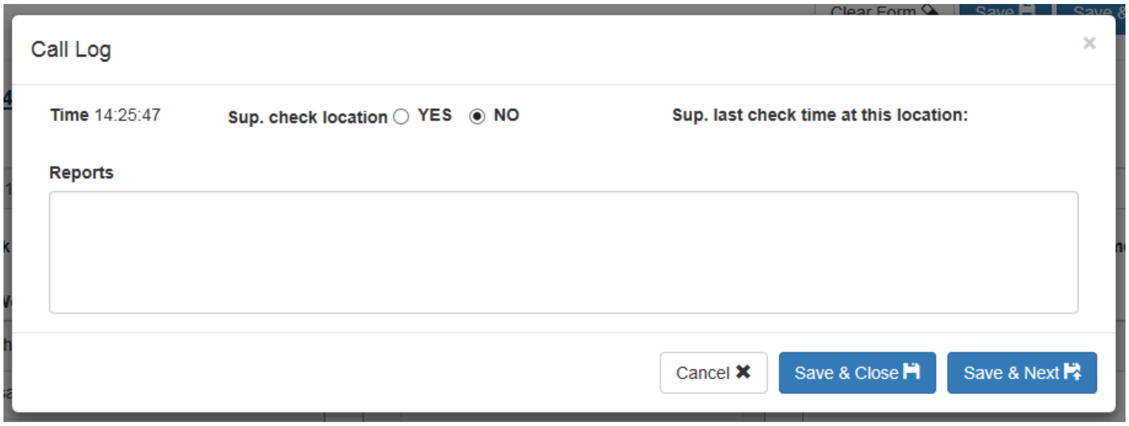
9. The **Last check location** label shows the last location the supervisor checked.
10. The **Last check time for area** show the last time a supervisor check a location for the selected area.
11. Select **Persons Working** by checking the box next to their name. A box that is not checked will represent an absence.
    NB: *An employee with a red color is scheduled for a day off. An employee with a green color is the Stand-By schedule to work for the employee on day off.*
12. Select **Switches**, if any, by checking the box next to the employee's name.
    NB: *The Employees are sorted by Stand-By Employees (those with a green color) first and then all other employees scheduled for the shift who are not currently working.*
13. Add **Double Shifts**:
    a. Click on the label **Double Shifts**. The following pop-up will be displayed.



Add new double shift employee

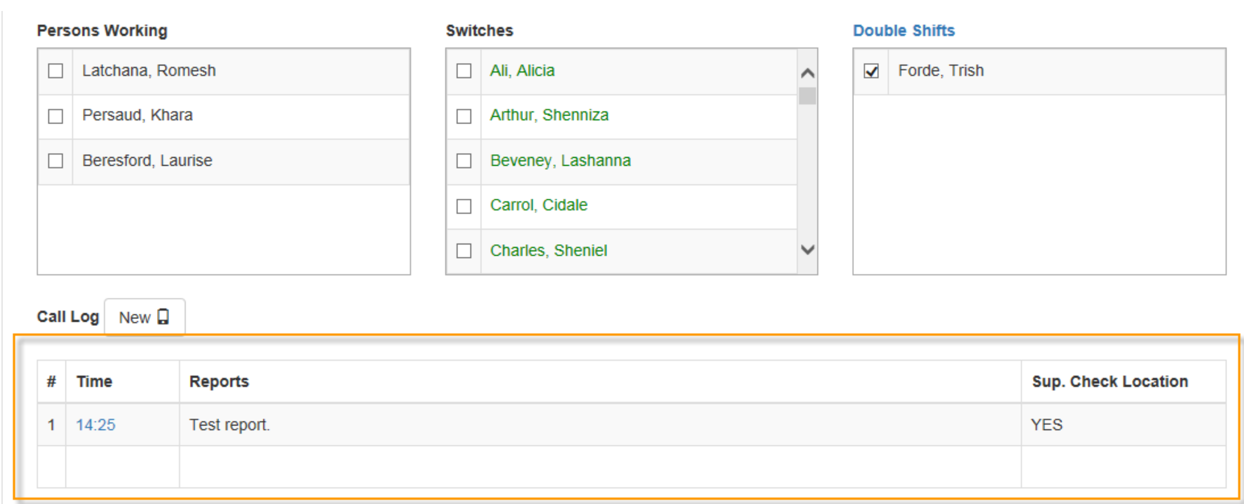
b. You must first **Search** for the employee to put on a double shift. Check either the **Previous Shift** (Those employees that worked the preceding shift) or **Any Employee** (brings back all employees not currently working).
c. Enter a **Name**, either the first or last.
d. Click on the **Search** button.
e. Check the box next to the employees' name to select the person working the double.
f. Click **Save & Close** to save the double and close the pop-up or click **Save & Next** to save the current double and add a next one.
g. When Save and Close is clicked, the added record will be displayed in the Double Shifts box.

14. Add **Call Log**:
    a. Click the New button next to the Call Log label. The following popup is displayed:



Add new call log

b. The **Time** is auto-completed and set to the current time.
c. Check **YES** if the Supervisor checked the location or **NO** if otherwise.
d. The **Sup. Last check time at this location** label shows the last time the supervisor checked the current location.
e. Enter **Reports**.
f. Click **Save & Close** to save the call log and close the pop-up or click **Save & Next** to save the current call log and add a next one.
g. When Save and Close is clicked, the added record will be displayed as follows:



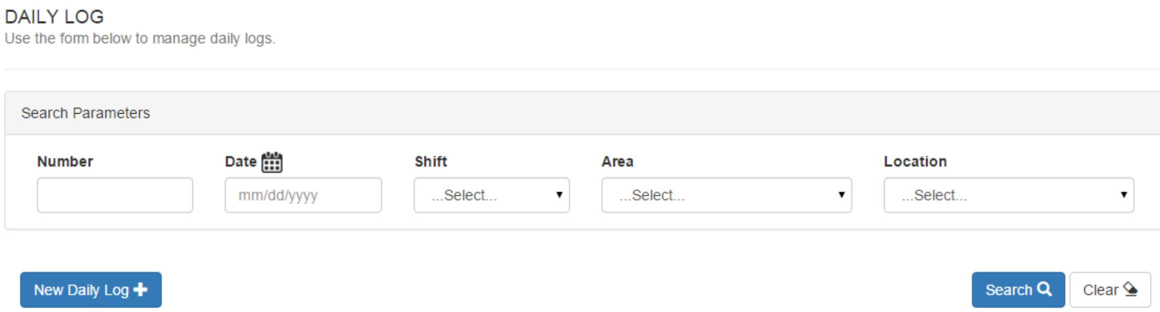
a. Clicking on the Time will load the call log record to be modified. This is only allowed up to five minutes after the record is added or anytime if you have the Manager role.

15. Click **Save** or **Save & Next** to complete.

Search

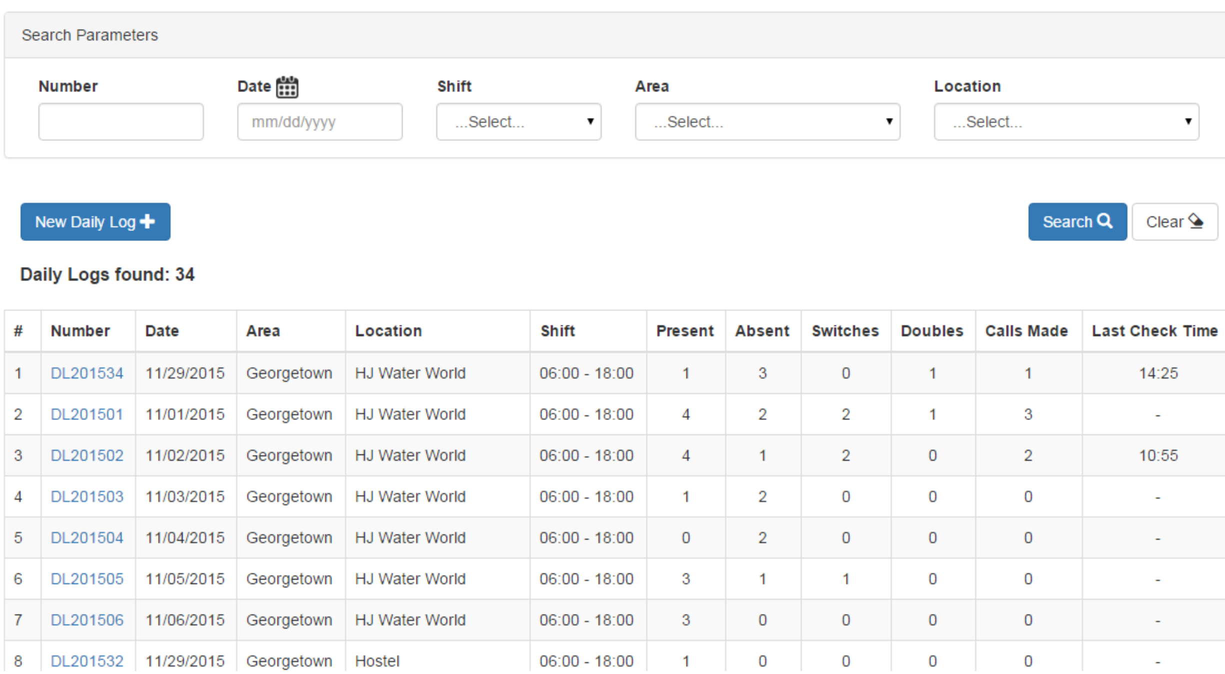
This feature is only available to users with the Manager role.

1. On the toolbar click **Operators** -> **Daily Log**. The following page will be displayed:



Daily log search screen

2. You can use either one, all, a combination of, or none of the following parameters to search for logs:
   a. Number
   b. Date
   c. Shift
   d. Area
   e. Location
3. Click on the **Search** button when completed and if any records are found, they will be displayed in a table. <u>NB: If no parameters are entered and the search button is click, all records will return.</u>



#	Number	Date	Area	Location	Shift	Present	Absent	Switches	Doubles	Calls Made	Last Check Time
1	DL201534	11/29/2015	Georgetown	HJ Water World	06:00 - 18:00	1	3	0	1	1	14:25
2	DL201501	11/01/2015	Georgetown	HJ Water World	06:00 - 18:00	4	2	2	1	3	-
3	DL201502	11/02/2015	Georgetown	HJ Water World	06:00 - 18:00	4	1	2	0	2	10:55
4	DL201503	11/03/2015	Georgetown	HJ Water World	06:00 - 18:00	1	2	0	0	0	-
5	DL201504	11/04/2015	Georgetown	HJ Water World	06:00 - 18:00	0	2	0	0	0	-
6	DL201505	11/05/2015	Georgetown	HJ Water World	06:00 - 18:00	3	1	1	0	0	-
7	DL201506	11/06/2015	Georgetown	HJ Water World	06:00 - 18:00	3	0	0	0	0	-
8	DL201532	11/29/2015	Georgetown	Hostel	06:00 - 18:00	1	0	0	0	0	-

Daily log search results

Modify

If you have the Manager Role:

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on its **Number** to open.

Daily Logs found: 36

#	Number	Date	Area	Location	Shift	Present	Absent	Switches	Doubles	Calls Made	Last Check Time
1	DL201532	11/30/2015	Georgetown	1763 Monument	06:00 - 18:00	0	2	0	0	1	-
2	DL201501	11/01/2015	Georgetown	HJ Water World	06:00 - 18:00	4	2	2	1	3	-
3	DL201502	11/02/2015	Georgetown	HJ Water World	06:00 - 18:00	4	1	2	0	2	10:55
4	DL201503	11/03/2015	Georgetown	HJ Water World	06:00 - 18:00	1	2	0	0	0	-
5	DL201504	11/04/2015	Georgetown	HJ Water World	06:00 - 18:00	0	2	0	0	0	-
6	DL201505	11/05/2015	Georgetown	HJ Water World	06:00 - 18:00	2	1	0	0	0	-

Opening a daily log record

3. From the window displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

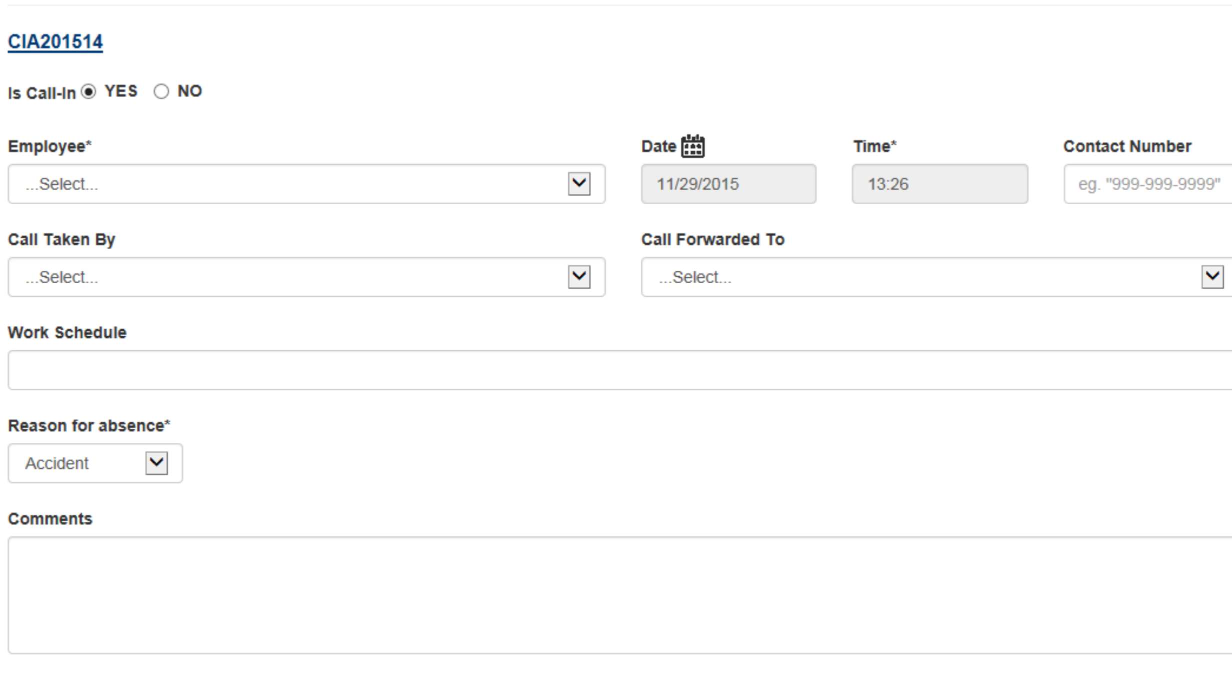
OR

If operator, you can only modify logs for the current day, unless a DateTime grant is active.

1. Open the Daily Log form
2. Select the Area, Location and Shift.
3. If the log has been saved, it will be loaded for modification.
4. Make changes as need and then click on the **Save** or **Save & Next** button.

Call In/Report Off/Sent Home Form

This feature is only available to users that have either the Operator or Manager Role.

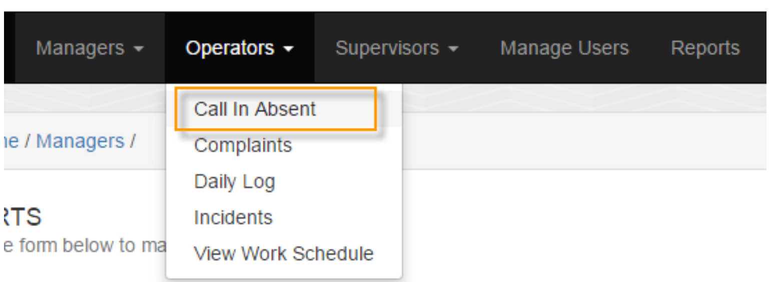


Call In/Absent/Report off Form

Add New

To add a new call in record, follow the below steps:

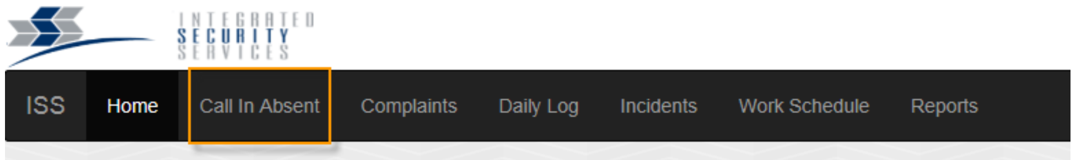
1. To access the data entry page:
    a. If you have the Manager Role, on the toolbar click **Operators** -> **Call In Absent**



Accessing the Call In Absent page

i. On the page that is displayed, click on the **New Absence** button.

b. If you have the Operator role, click on the **Call In Absent** button on the toolbar.



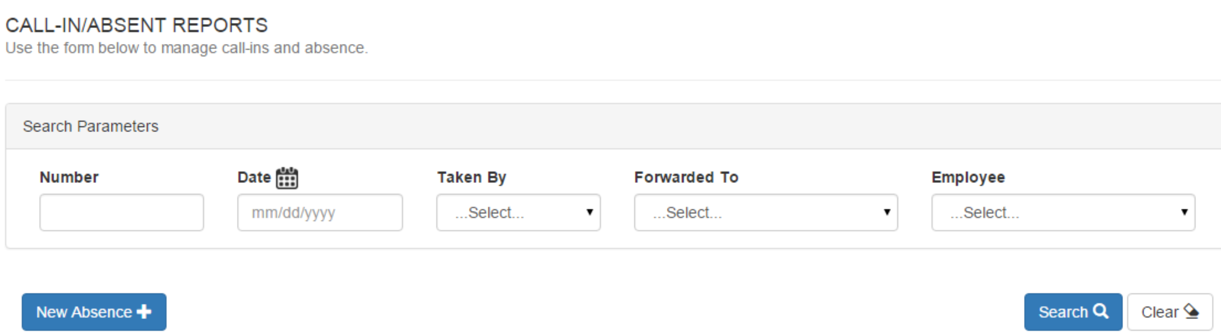
Accessing the Call In Absent page

2. The report number is auto-generated.
3. Check **Yes** if Is Call-In or **No** if otherwise.
4. The date and time fields are automatically completed and set to the current day and time.
5. Select the employee from the **Employee** drop down list.
6. Enter a **Contact Number** if known.
7. Select **Call Taken By**.
8. Select **Call Forwarded To**.
9. Enter **Work Schedule** if known.
10. Select **Reason for absence**. If **Other** is selected, specify the details in the Other text box.
11. Enter **Comments**.
12. Click **Save** or **Save & Next** to complete.

Search

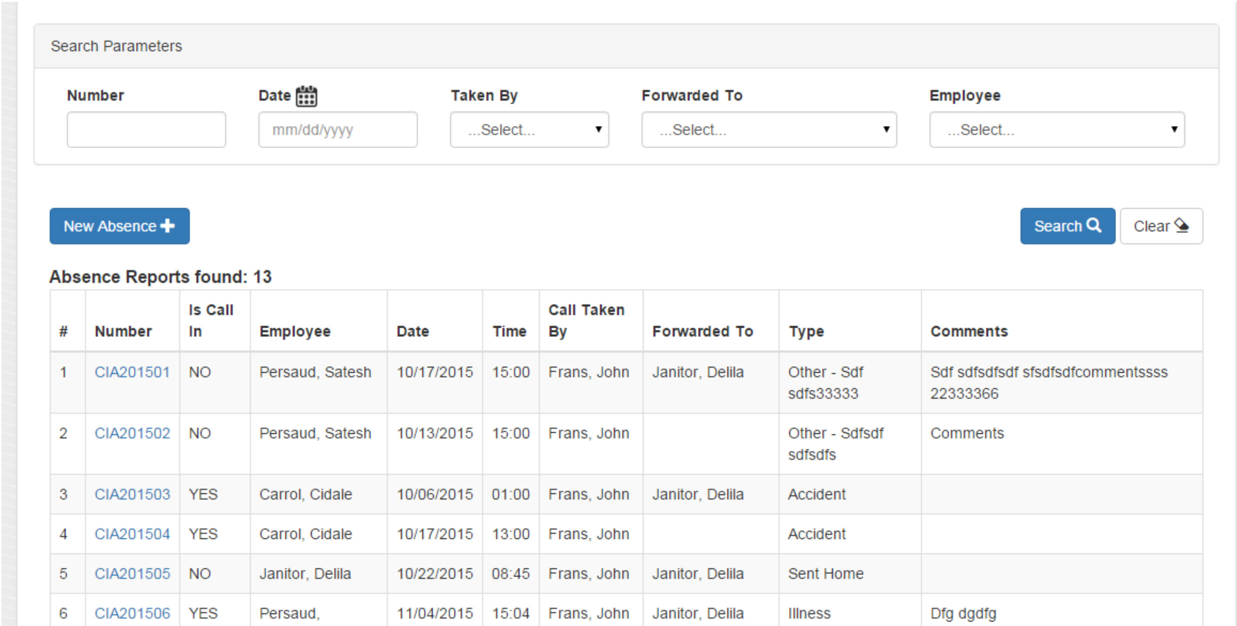
This feature is only available to users with the Manager role.

1. On the toolbar click **Operators** -> **Call In Absent**. The following page will be displayed:



Call in absent search form

2. You can use either one, all, a combination of, or none of the following parameters to search for call in records:
    a. Number
    b. Date
    c. Taken By
    d. Forwarded To
    e. Employee
3. Click on the **Search** button when completed and if any records are found, they will be displayed in a table. <u>NB: If no parameters are entered and the search button is click, all records will return.</u>



#	Number	Is Call In	Employee	Date	Time	Call Taken By	Forwarded To	Type	Comments
1	CIA201501	NO	Persaud, Satesh	10/17/2015	15:00	Frans, John	Janitor, Delila	Other - Sdf sdfs33333	Sdf sdfsdfsdf sfsdfsdfcommentssss 22333366
2	CIA201502	NO	Persaud, Satesh	10/13/2015	15:00	Frans, John		Other - Sdfsdf sdfsdfs	Comments
3	CIA201503	YES	Carrol, Cidale	10/06/2015	01:00	Frans, John	Janitor, Delila	Accident	
4	CIA201504	YES	Carrol, Cidale	10/17/2015	13:00	Frans, John		Accident	
5	CIA201505	NO	Janitor, Delila	10/22/2015	08:45	Frans, John	Janitor, Delila	Sent Home	
6	CIA201506	YES	Persaud,	11/04/2015	15:04	Frans, John	Janitor, Delila	Illness	Dfg dgdfg

Call in Absent search results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on its **Number** to open.

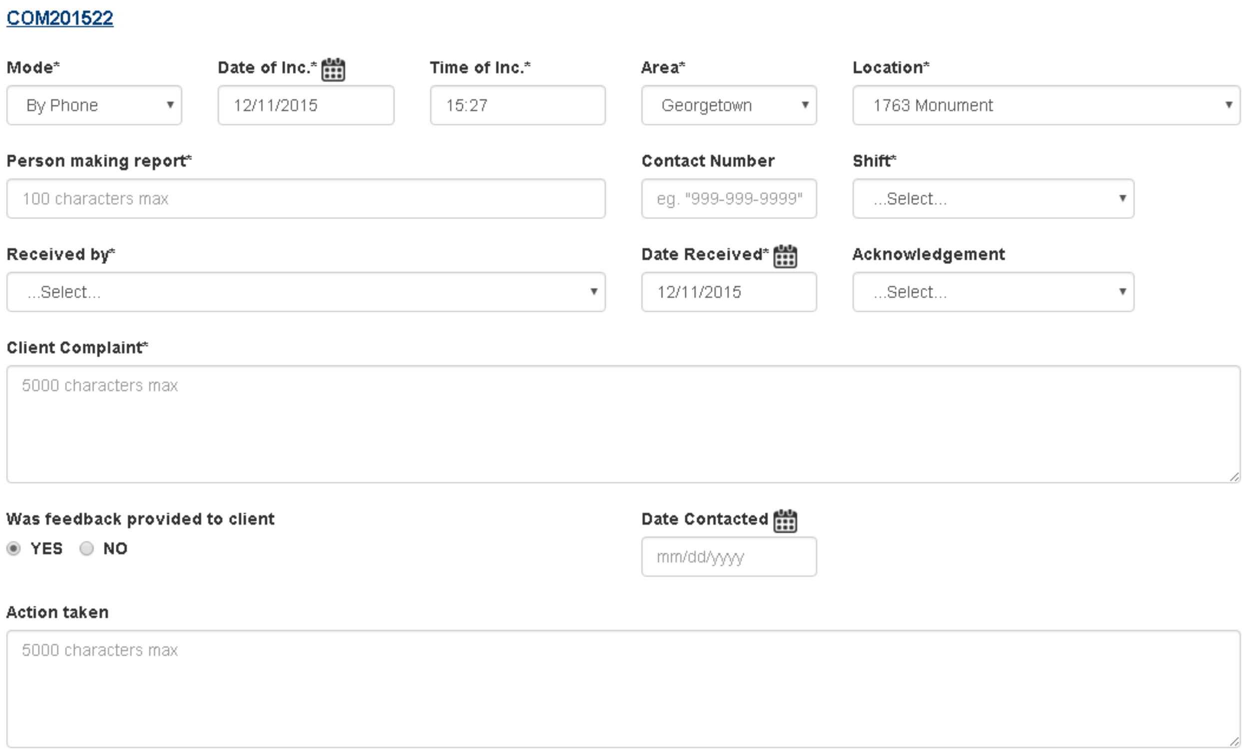
#	Number	Is Call In	Employee	Date	Time	Call Taken By	Forwarded To	Type	Comments
1	CIA201501	NO	Persaud, Satesh	10/17/2015	15:00	Frans, John	Janitor, Delila	Other - Sdf sdfs33333	Sdf sdfsdfsdf sfsdfsdfcommentssss 22333366
2	CIA201502	NO	Persaud, Satesh	10/13/2015	15:00	Frans, John		Other - Sdfsdf sdfsdfs	Comments
3	CIA201503	YES	Carrol, Cidale	10/06/2015	01:00	Frans, John	Janitor, Delila	Accident	

Opening a call in absent record

3. From the window displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

Complaints

This feature is only available to users that have the **Operator**, **Compliance Officer** or **Manager Role**.

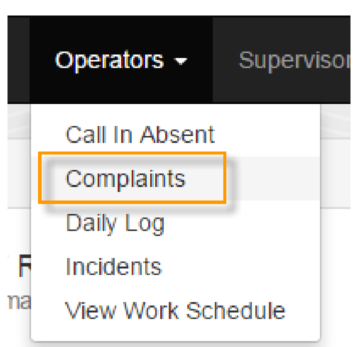


Complaints form

Add New

To add a new complaint record, follow the below steps:

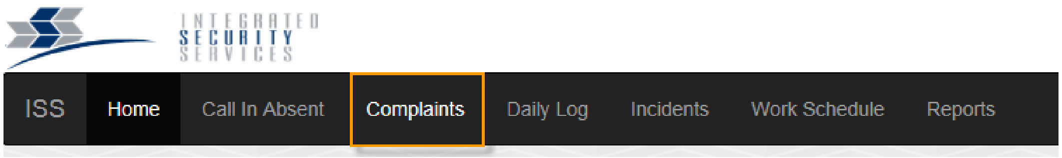
1. To access the data entry page:
    a. If you have the Manager Role, on the toolbar click **Operators** -> **Complaints**



Manager accessing the Complaint page

i. On the page that is displayed, click on the **New Complaint** button.

b. If you have the Operator role, click on the **Complaints** button on the toolbar.



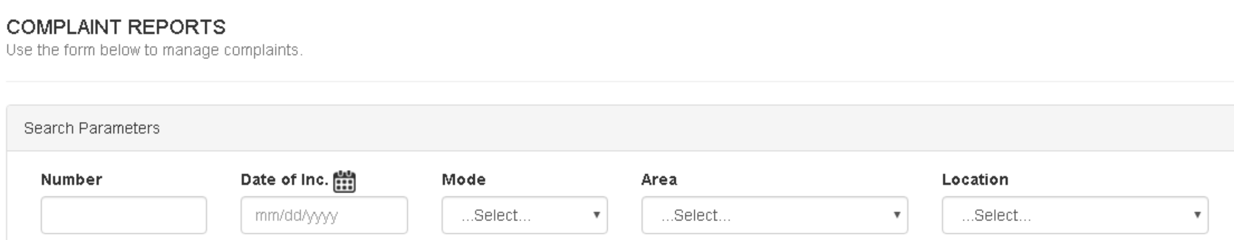
Operator/Compliance Officer accessing the Complaints page

2. The report number is auto-generated.
3. Select the **Mode**.
4. The **Date of Inc.** and **Time** are auto-completed. These can be changed to a previous date/time.
5. Select the **Area**.
6. Select the **Location**.
7. Enter the **Person making report**
8. Enter the **Contact Number**, if known.
9. Select the **Shift**.
10. Select **Received by**.
11. The **Date Received** is autocompleted and cannot be changed.
12. Select **Acknowledgement.**
13. Enter the **Client Complaint.**
14. Check **YES** if feedback was provided, **NO** if otherwise.
15. Select the **Date Contacted**.
16. Enter the **Action taken**.
17. Click **Save** or **Save & Next** to complete.

Search

This feature is only available to users with the Compliance Officer or Manager role.

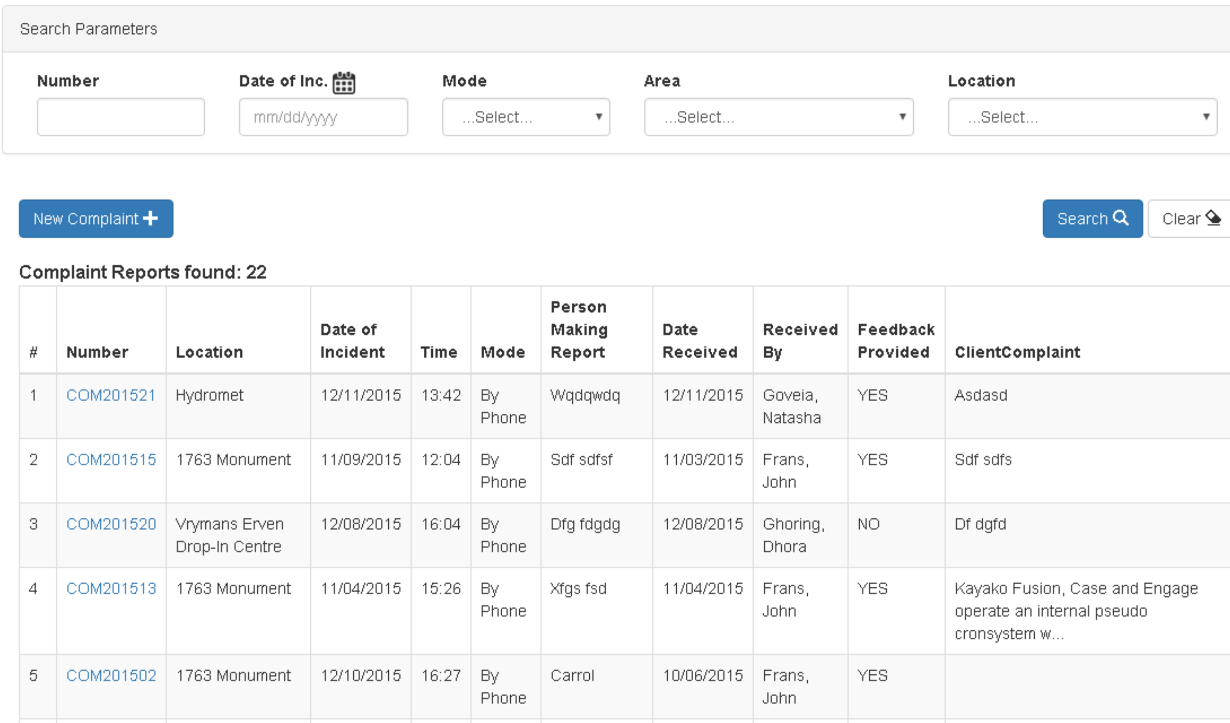
1. If Compliance Officer, click **Complaints** on the toolbar.
2. If Manager, on the toolbar click **Operators** -> **Complaints**. The following page will be displayed:



Complaints search form

3. You can use either one, all, a combination of, or none of the following parameters to search for complaints:

   a. Number
   b. Date
   c. Mode
   d. Area
   e. Location
4. Click on the Search button when completed and if any records are found, they will be displayed in a table. <u>NB: If no parameters are entered and the search button is click, all records will return.</u>



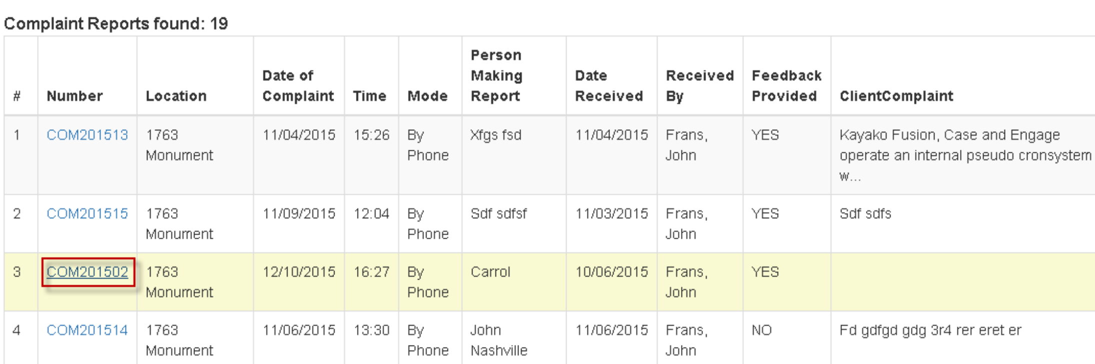
Complaint Reports found: 22

#	Number	Location	Date of Incident	Time	Mode	Person Making Report	Date Received	Received By	Feedback Provided	ClientComplaint
1	COM201521	Hydromet	12/11/2015	13:42	By Phone	Wqdqwdq	12/11/2015	Goveia, Natasha	YES	Asdasd
2	COM201515	1763 Monument	11/09/2015	12:04	By Phone	Sdf sdfsf	11/03/2015	Frans, John	YES	Sdf sdfs
3	COM201520	Vrymans Erven Drop-In Centre	12/08/2015	16:04	By Phone	Dfg fdgdg	12/08/2015	Ghoring, Dhora	NO	Df dgfd
4	COM201513	1763 Monument	11/04/2015	15:26	By Phone	Xfgs fsd	11/04/2015	Frans, John	YES	Kayako Fusion, Case and Engage operate an internal pseudo cronsystem w...
5	COM201502	1763 Monument	12/10/2015	16:27	By Phone	Carrol	10/06/2015	Frans, John	YES	

Complaints search results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on its **Number** to open.



Complaint Reports found: 19

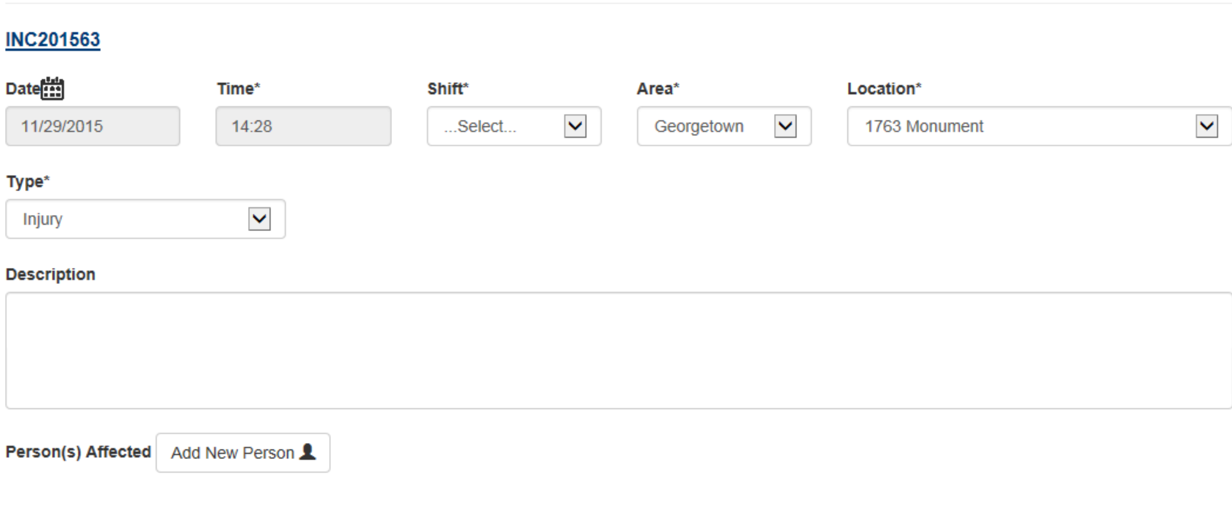
#	Number	Location	Date of Complaint	Time	Mode	Person Making Report	Date Received	Received By	Feedback Provided	ClientComplaint
1	COM201513	1763 Monument	11/04/2015	15:26	By Phone	Xfgs fsd	11/04/2015	Frans, John	YES	Kayako Fusion, Case and Engage operate an internal pseudo cronsystem w...
2	COM201515	1763 Monument	11/09/2015	12:04	By Phone	Sdf sdfsf	11/03/2015	Frans, John	YES	Sdf sdfs
3	COM201502	1763 Monument	12/10/2015	16:27	By Phone	Carrol	10/06/2015	Frans, John	YES	
4	COM201514	1763 Monument	11/06/2015	13:30	By Phone	John Nashville	11/06/2015	Frans, John	NO	Fd gdfgd gdg 3r4 rer eret er

Opening a complaint record

3. From the window displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

Incidents

This feature is only available to users that have the **Operator**, **Compliance Officer** or **Manager Role**.

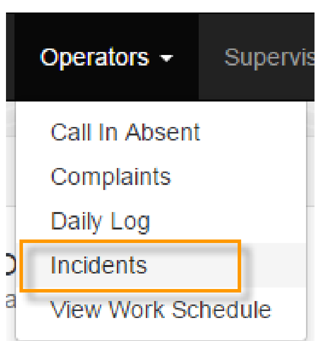


Incidents form

Add New

To add a new incident record, follow the below steps:

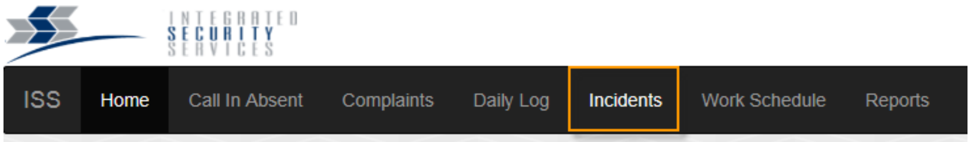
1. To access the data entry page:
   a. If you have the Manager Role, on the toolbar click **Operators** -> **Incidents**



Manager accessing the Incidents Page

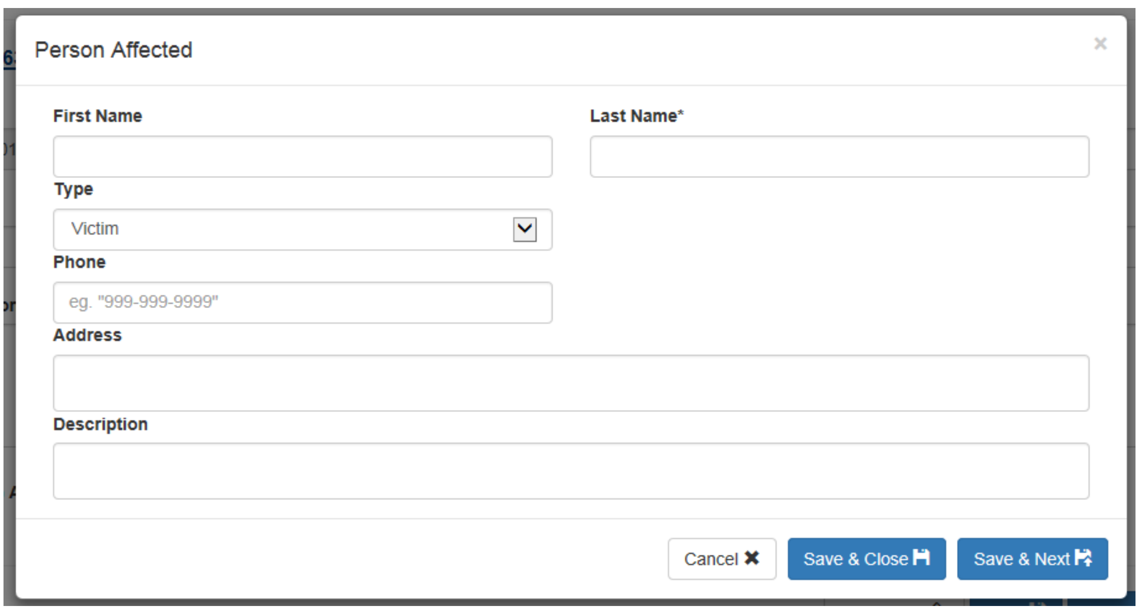
i. On the page that is displayed, click on the **New Incident** button.

b. If you have the Operator role, click on the **Incidents** button on the toolbar.



Operator/Compliance Officer accessing the Incidents page

2. The report number is auto-generated.
3. The **Date** and **Time** are auto-completed and set to the current day and time.
4. Select the **Shift**.
5. Select the **Area**.
6. Select the **Location**.
7. Select the **Type**. If **Other** is selected, you must specify the Other description.
8. Enter the **Description**.
9. Add Person(s) Affected:
   a. Click on the **Add New Person** button. The following pop-up will be displayed:



Add person affected screen

   b. Enter the **First Name**, if known.
   c. Enter the **Last Name**
   d. Select the **Type**. If **Other** is selected, you must specify the description.
   e. Enter the **Phone**, if known.
   f. Enter the **Address**.
   g. Enter the **Description**.

h. Click **Save & Close** to save the record and close the pop-up or click **Save & Next** to save the current record and add a next one.

i. When Save and Close is clicked, the added record will be displayed as follows:

Person(s) Affected Add New Person

#	Name	Phone	Address	Type	Description
1	Forde, Trish	592-876-9087	Address here	Victim	Description here

Person affected display

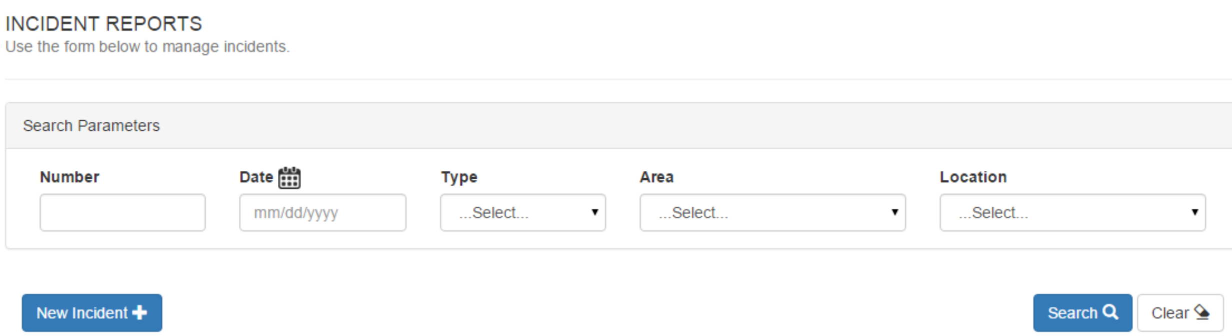
j. Clicking on the Name will load the person's record to be modified. This is only allowed up to five minutes after the record is added or anytime if you have the Manager or Compliance Officer role.

10. Click **Save** or **Save & Next** to complete.

Search

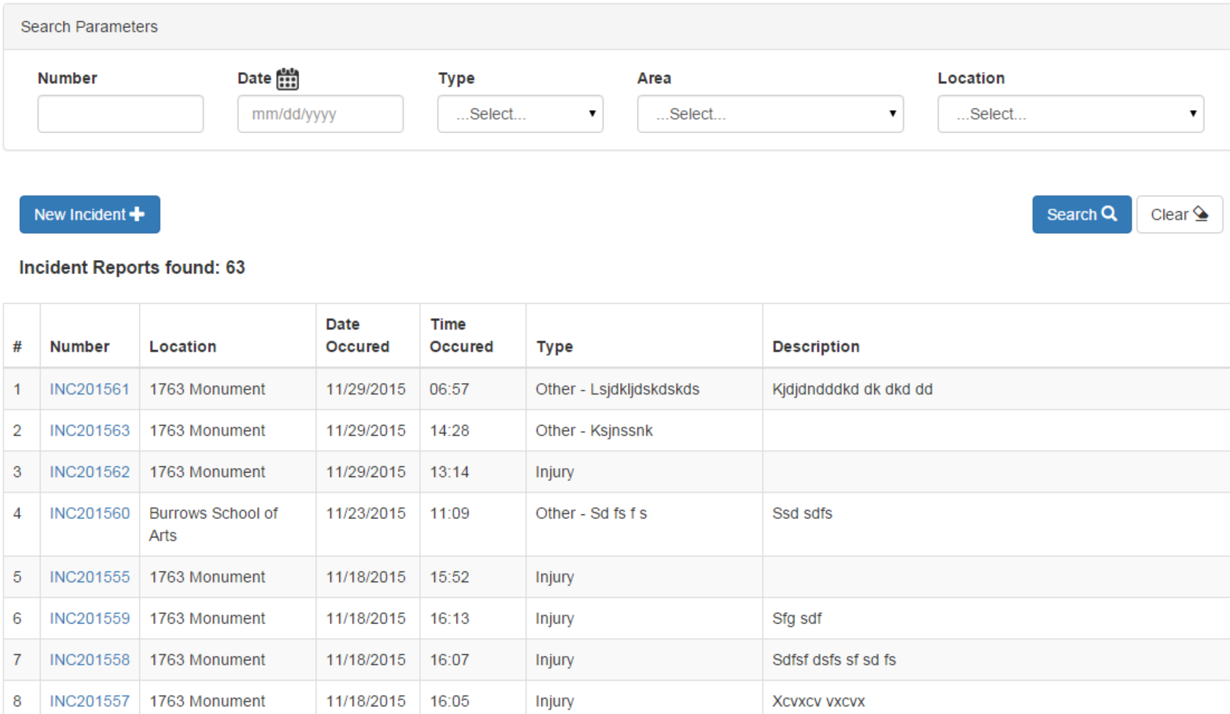
This feature is only available to users with the Compliance Officer or Manager role.

1. If Compliance Officer, click **Incidents** on the toolbar.
2. If Manager, on the toolbar click **Operators** -> **Incidents**. The following page will be displayed:



Incidents search form

3. You can use either one, all, a combination of, or none of the following parameters to search for incidents:
    a. Number
    b. Date
    c. Type
    d. Area
    e. Location
4. Click on the Search button when completed and if any records are found, they will be displayed in a table. <u>NB: If no parameters are entered and the search button is click, all records will return.</u>



#	Number	Location	Date Occured	Time Occured	Type	Description
1	INC201561	1763 Monument	11/29/2015	06:57	Other - Lsjdkljdskdskds	Kjdjdndddkd dk dkd dd
2	INC201563	1763 Monument	11/29/2015	14:28	Other - Ksjnssnk	
3	INC201562	1763 Monument	11/29/2015	13:14	Injury	
4	INC201560	Burrows School of Arts	11/23/2015	11:09	Other - Sd fs f s	Ssd sdfs
5	INC201555	1763 Monument	11/18/2015	15:52	Injury	
6	INC201559	1763 Monument	11/18/2015	16:13	Injury	Sfg sdf
7	INC201558	1763 Monument	11/18/2015	16:07	Injury	Sdfsf dsfs sf sd fs
8	INC201557	1763 Monument	11/18/2015	16:05	Injury	Xcvxcv vxcvx

Incident search results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on its **Number** to open.

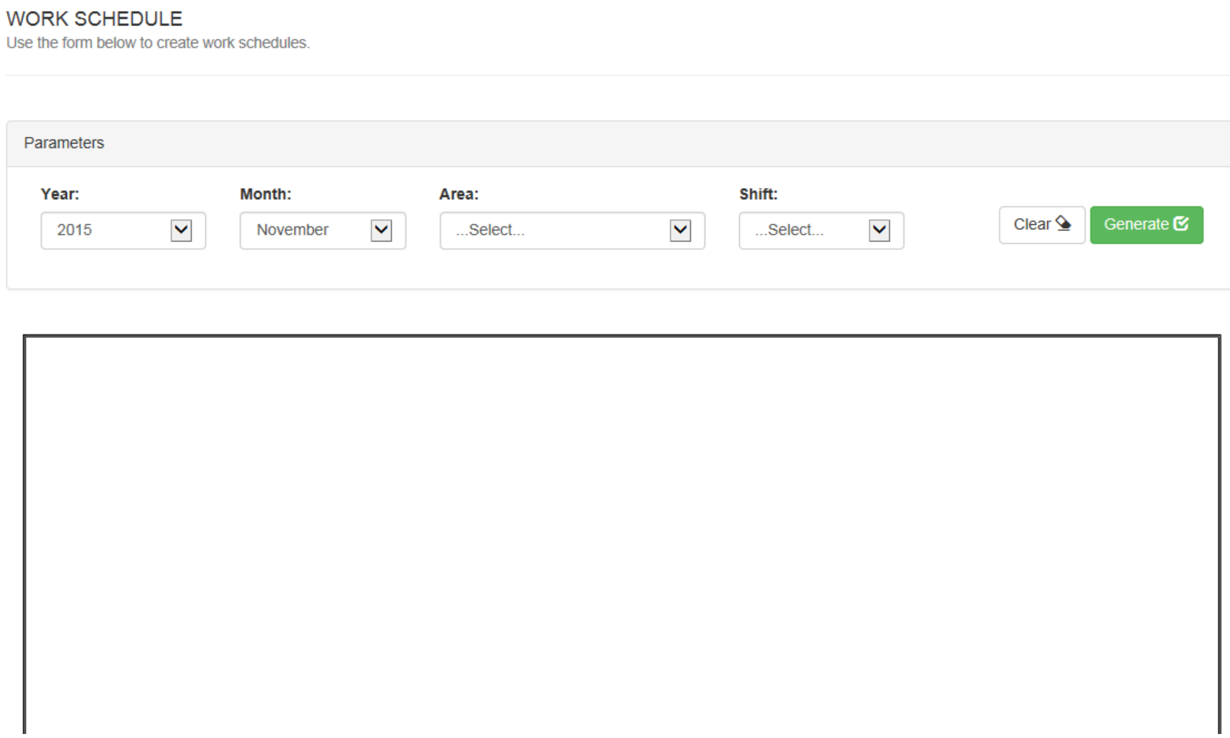
#	Number	Location	Date Occured	Time Occured	Type	Description
1	INC201561	1763 Monument	11/29/2015	06:57	Other - Lsjdkljdskdskds	Kjdjdndddkd dk dkd dd
2	INC201563	1763 Monument	11/29/2015	14:28	Other - Ksjnssnk	
3	INC201562	1763 Monument	11/29/2015	13:14	Injury	
4	INC201560	Burrows School of Arts	11/23/2015	11:09	Other - Sd fs f s	Ssd sdfs
5	INC201555	1763 Monument	11/18/2015	15:52	Injury	
6	INC201559	1763 Monument	11/18/2015	16:13	Injury	Sfg sdf
7	INC201558	1763 Monument	11/18/2015	16:07	Injury	Sdfsf dsfs sf sd fs

Opening an Incident record

3. From the window displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

Work Schedule

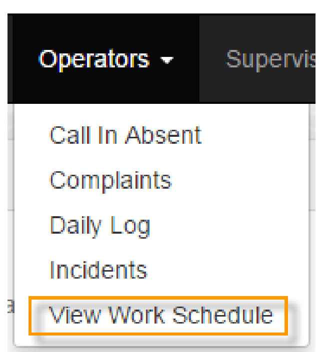
This feature is only available to users that have the **Operator**, **Supervisor** or **Manager Role**.



Work Schedule Page

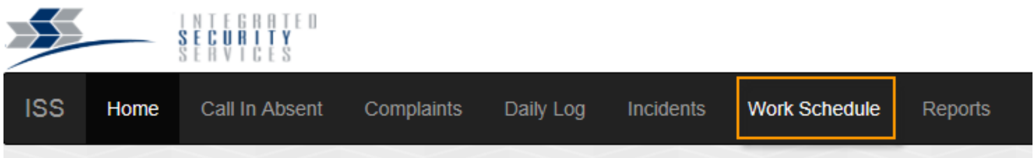
To view a work schedule:

1. To access the form:
    a. If you have the Manager Role, on the toolbar click **Operators** -> **View Work Schedule**



Manager accessing the work schedule page

    b. If you have the Operator or Supervisor role, click on the **Work Schedule** button on the toolbar.



Operator or Supervisor accessing the Work Schedule page

2. Select the **Year**. It defaults to the current year.
3. Select **Month**. It defaults to the current month.
4. Select **Area**.
5. Select **Shift**. Leave unselected if you want to view all shifts.
6. Click **the Generate** button. The report will be displayed as follow:

WORK SCHEDULE REPORT

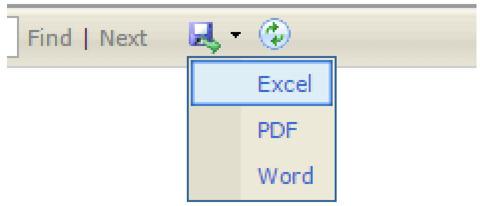
Month: November, 2015 **Area:** Georgetown **Shift:** All

		1	2	3	4	5	6	7	8	9	10	11
1763 Monument	06:00 - 18:00	Deane.D, Forde.J	Deane.D, Forde.J	Deane.D, Forde.J	Deane.D, Forde.J	Deane.D, Forde.J	Deane.D, Forde.J	Deane.D, Forde.J	Deane.D, Forde.J	Forde.J, Holder.K	Deane.D, Forde.J	Deane.D, Forde.J
	18:00 - 06:00	Kum.M, Ali.A	Babb.C, Kum.M	Babb.C, Kum.M	Babb.C, Kum.M	Babb.C, Kum.M	Babb.C, Kum.M	Babb.C, Kum.M	Babb.C, Kum.M	Babb.C, Kum.M	Babb.C, Kum.M	Babb.C, Ku
	Off Duty	Babb.C								Deane.D		
1823 Monument	06:00 - 18:00	Westmaas.O	Westmaas.O	Westmaas.O	Westmaas.O	Westmaas.O	Westmaas.O	Westmaas.O	Westmaas.O	Westmaas.O	Westmaas.O	Westmaas.
	18:00 - 06:00	Percival.J		Percival.J	Percival.J	Percival.J	Percival.J	Percival.J	Percival.J	Percival.J	Percival.J	Percival.J
	Off Duty		Percival.J									
Acme Photo Studio	18:00 - 06:00	Lemeh.W	Lemeh.W	Lemeh.W	Lemeh.W	Lemeh.W	Lemeh.W	Lemeh.W	Lemeh.W	Lemeh.W	Lemeh.W	Lemeh.W
Andrew Lewis Gym	06:00 - 18:00	Trotman.D	Trotman.D	Trotman.D	Trotman.D	Trotman.D	Trotman.D	Trotman.D	Trotman.D	Trotman.D	Trotman.D	Trotman.D
	18:00 - 06:00	Operct.G	Operct.G		Operct.G	Operct.G	Operct.G	Operct.G	Operct.G	Operct.G	Operct.G	Operct.G
	Off Duty			Operct.G								

Generated work schedule view

7. To save the schedule click on the Export button and select a format.

Work Schedule Export button



Work Schedule Export Formats

8. To print, first export the report to Excel and then print.

Supervisors

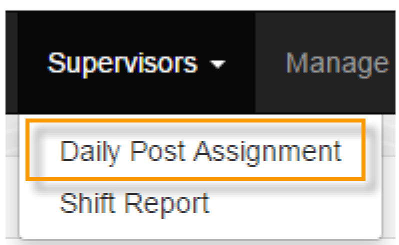
Daily Post Assignments

This feature is only available to users that have the **Supervisor** or **Manager Role**.

Add New

To add a new daily post assignment record, follow the below steps:

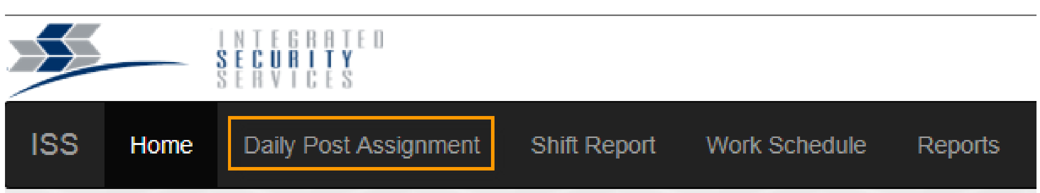
1. To access the data entry page:
    a. If you have the Manager Role, on the toolbar click **Supervisors** -> **Daily Post Assignment**



Manager accessing Daily Post Assignment

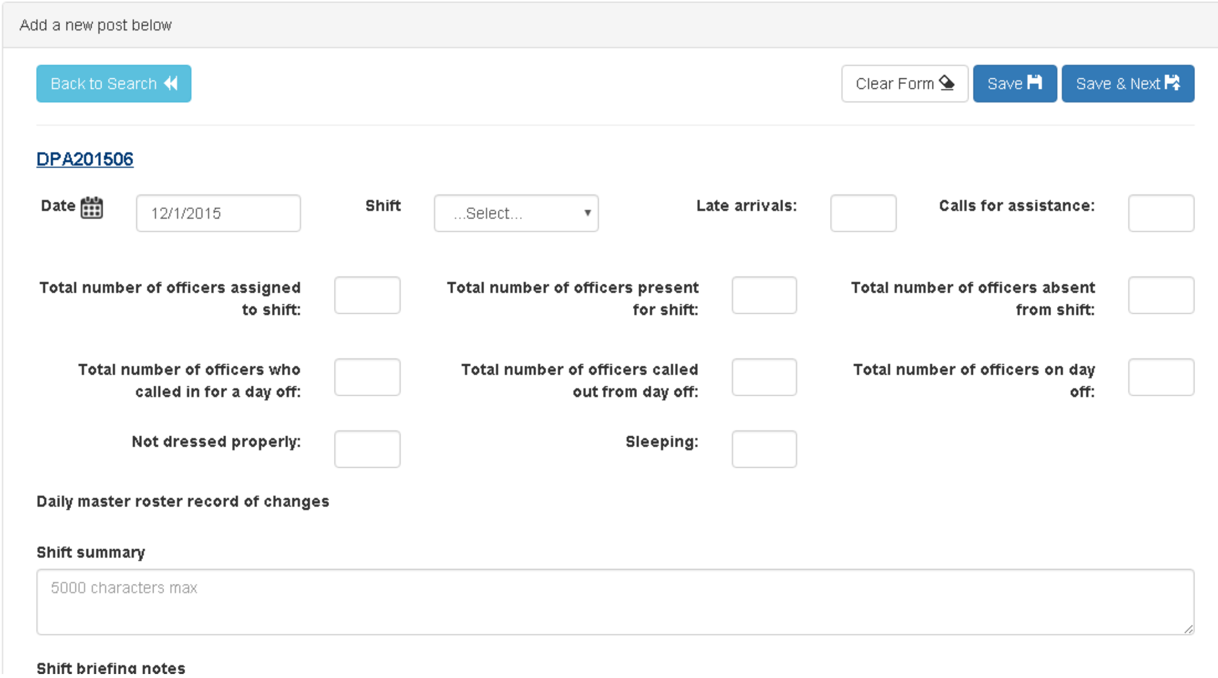
        i. On the page that is displayed, click on the **New Post** button.

    b. If you have the Supervisor role, click on the **Incidents** button on the toolbar. On the page that is displayed, click on the **New Post** button.



Supervisor accessing Daily Post Assignment

2. The following page is displayed:

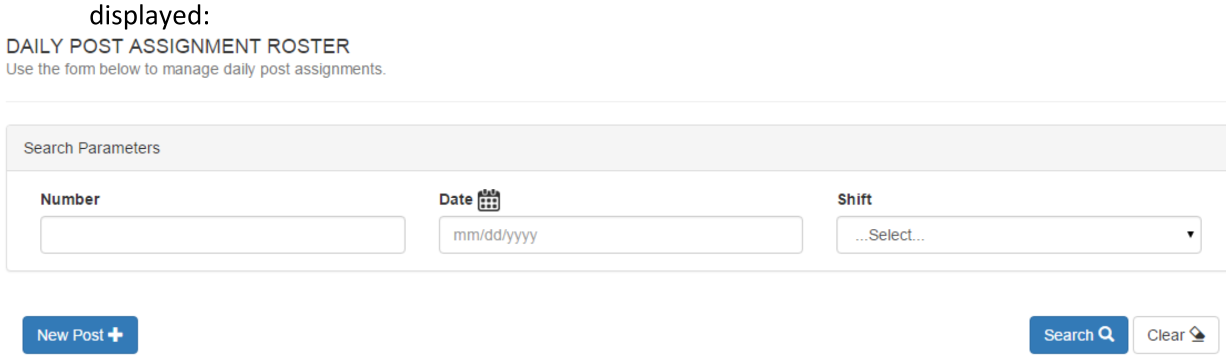


Daily Post Assignment From

3. The report number is auto-generated.
4. Select **Shift**. After selecting this, the Fields from **Late Arrivals** to **Daily master roster record of changes** will be auto populated. All these fields can be modified except the Master Roster table.
5. Enter **Shift Summary.**
6. Enter **Shift briefing notes**.
7. Enter **Passes on from last shift**.
8. Enter **Passed on to next shift**.
9. Enter **Summary of incidents**.
10. Click **Save** or **Save & Next** to complete.

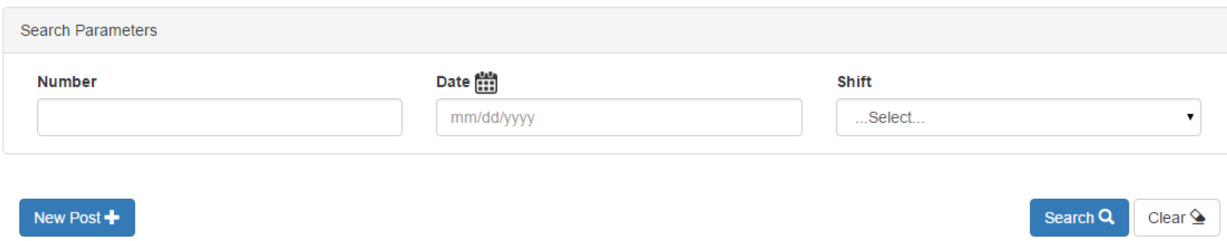
Search

1. If Supervisor, click **Daily Post Assignment** on the toolbar.
2. If Manager, on the toolbar click **Supervisor** -> **Daily Post Assignment**. The following page will be displayed:



Daily Post Assignment Search

3. You can use either one, all, a combination of, or none of the following parameters to search for daily post assignments:
    a. Number
    b. Date
    c. Shift
4. Click on the Search button when completed and if any records are found, they will be displayed in a table. NB: If no parameters are entered and the search button is click, all records will return.



Daily Post Assignments found: 5

#	Number	Date	Shift	Late Arrivals	Calls for Assis.	Assigned	Present	Absent	Call Ins	Call Outs	On day Off	Not Dress Prop.
1	DPA201505	11/18/2015	06:00 - 18:00	0	0	50	0	49	0	0	1	0
2	DPA201504	11/10/2015	06:00 - 18:00	0	0	48	2	47	3	4	1	5
3	DPA201503	11/02/2015	06:00 - 18:00	1	2	3	4	5	6	7	8	9
4	DPA201502	11/01/2015	18:00 - 06:00	0	0	3	2	2	0	1	1	0
5	DPA201501	11/01/2015	06:00 - 18:00	0	0	9	6	2	1	1	1	0

Daily Post Assignment Search Results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on its **Number** to open.

Daily Post Assignments found: 5

#	Number	Date	Shift	Late Arrivals	Calls for Assis.	Assigned	Present	Absent	Call Ins	Call Outs	On day Off	Not Dress Prop.
1	DPA201505	11/18/2015	06:00 - 18:00	0	0	50	0	49	0	0	1	0
2	DPA201504	11/10/2015	06:00 - 18:00	0	0	48	2	47	3	4	1	5
3	DPA201503	11/02/2015	06:00 - 18:00	1	2	3	4	5	6	7	8	9
4	DPA201502	11/01/2015	18:00 - 06:00	0	0	3	2	2	0	1	1	0
5	DPA201501	11/01/2015	06:00 - 18:00	0	0	9	6	2	1	1	1	0

Opening Daily Post Assignment record

3. From the window displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

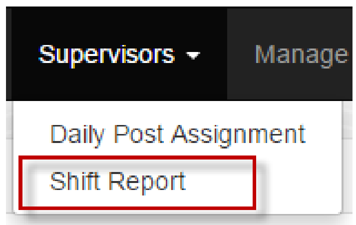
Shift Report

This feature is only available to users that have the **Supervisor** or **Manager Role**.

Add New

To add a new shift report record, follow the below steps:

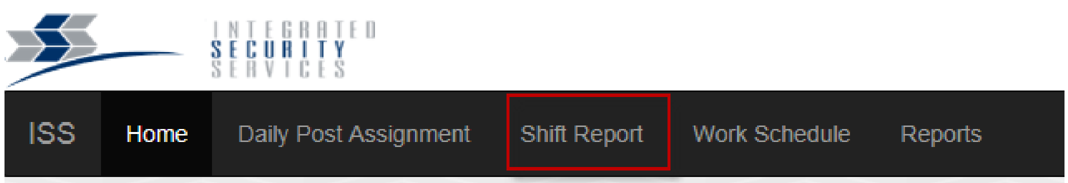
1. To access the data entry page:
    a. If you have the Manager Role, on the toolbar click **Supervisors** -> **Shift Report**



Manager accessing Shift Report page

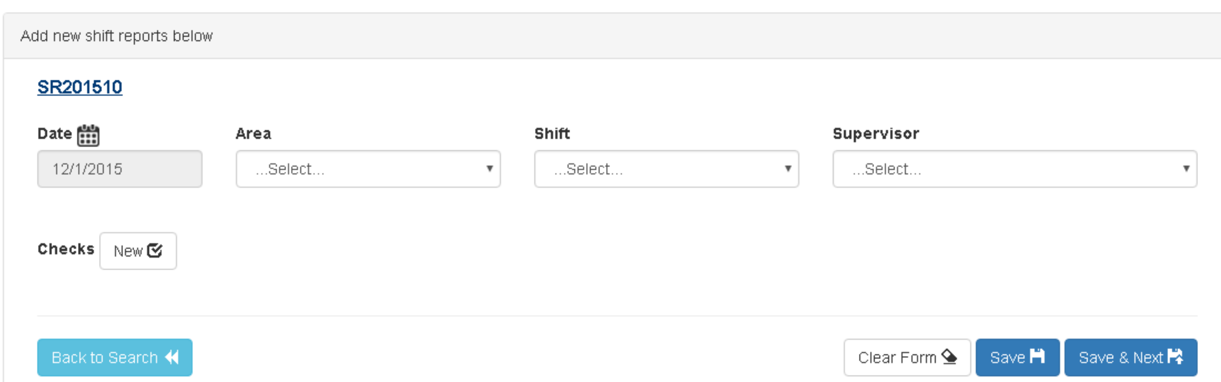
        i. On the page that is displayed, click on the **New Shift Report** button.

    b. If you have the Supervisor role, click on the **Shift Report** link on the toolbar.



Supervisor accessing the Shift Report page

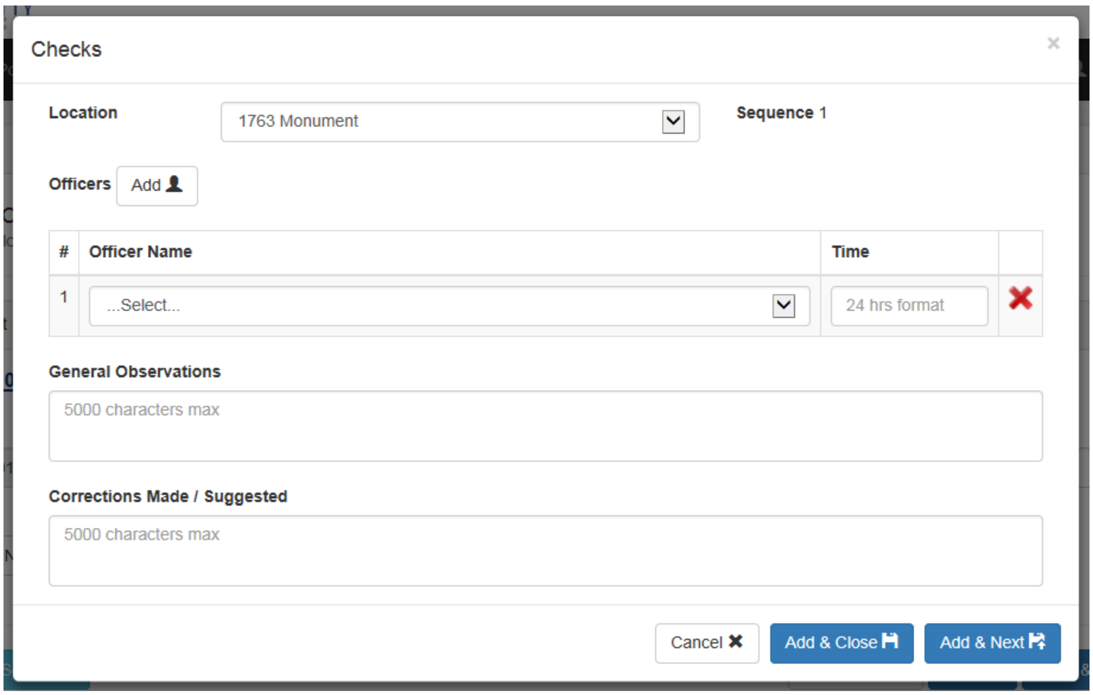
2. The following page is displayed:



Shift Report form

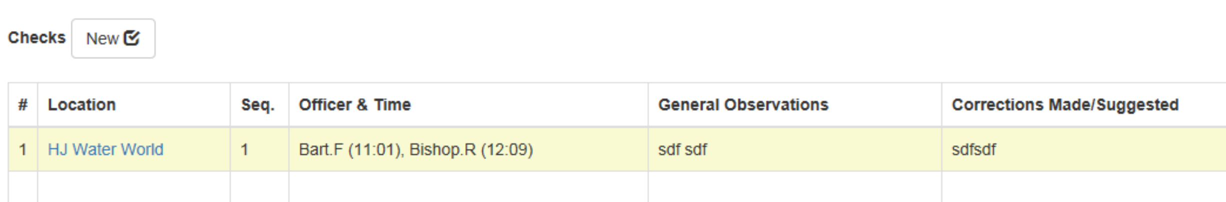
3. The report number is auto-generated.

4. The **Date** is auto-completed and set to the current day.
5. Select the **Area**.
6. Select the **Shift**.
7. Select the **Supervisor**.
8. Add Checks:
    a. Click on the **New** button next to the **Checks** label. The following pop-up will be displayed:



New Checks window

    b. Select the **Location**
    c. The **Sequence** label is auto-completed.
    d. Select the **Officer** from the **Officer Name** list and add the time. If more officers are to be added, click on the **Add** button next to the **Officers** label.
    e. Enter **General Observations**
    f. Enter **Corrects Made / Suggested**
    g. Click **Add & Close** to save the record and close the pop-up or click **Add & Next** to save the current record and add a next one.
    h. When Save and Close is clicked, the added record will be displayed as follows:
    i.



#	Location	Seq.	Officer & Time	General Observations	Corrections Made/Suggested
1	HJ Water World	1	Bart.F (11:01), Bishop.R (12:09)	sdf sdf	sdfsdf

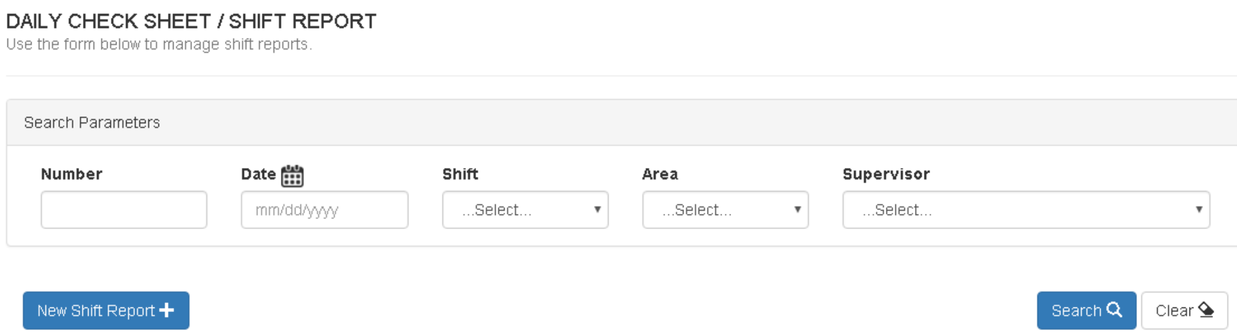
Checks display

   j. Clicking on the **Location** will load the record to be modified. This is only allowed up to five minutes after the record is added or anytime if you have the Manager role.

9. Click **Save** or **Save & Next** to complete.

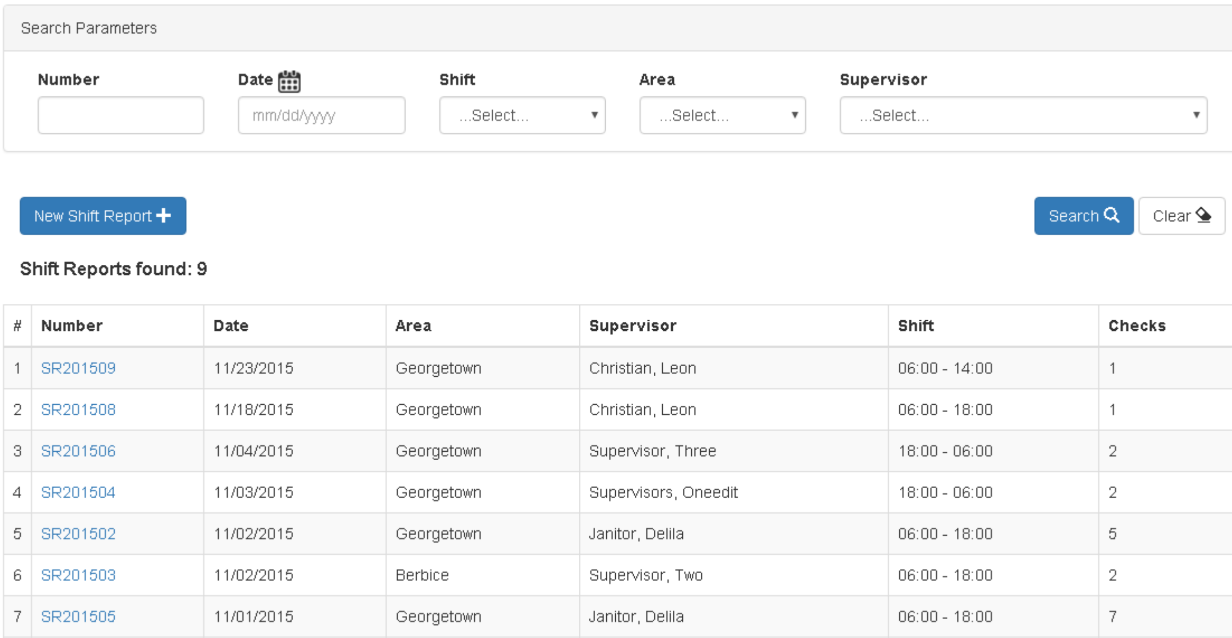
Search

1. If Compliance Officer, click **Shift Report** on the toolbar.
2. If Manager, on the toolbar click **Supervisors** -> **Shift Report**. The following page will be displayed:



Shift Report Search form

3. You can use either one, all, a combination of, or none of the following parameters to search for incidents:
   a. Number
   b. Date
   c. Shift
   d. Area
   e. Supervisor
4. Click on the Search button when completed and if any records are found, they will be displayed in a table. <u>NB: If no parameters are entered and the search button is click, all records will return.</u>



#	Number	Date	Area	Supervisor	Shift	Checks
1	SR201509	11/23/2015	Georgetown	Christian, Leon	06:00 - 14:00	1
2	SR201508	11/18/2015	Georgetown	Christian, Leon	06:00 - 18:00	1
3	SR201506	11/04/2015	Georgetown	Supervisor, Three	18:00 - 06:00	2
4	SR201504	11/03/2015	Georgetown	Supervisors, Oneedit	18:00 - 06:00	2
5	SR201502	11/02/2015	Georgetown	Janitor, Delila	06:00 - 18:00	5
6	SR201503	11/02/2015	Berbice	Supervisor, Two	06:00 - 18:00	2
7	SR201505	11/01/2015	Georgetown	Janitor, Delila	06:00 - 18:00	7

Shift Report Search Results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on its **Number** to open.

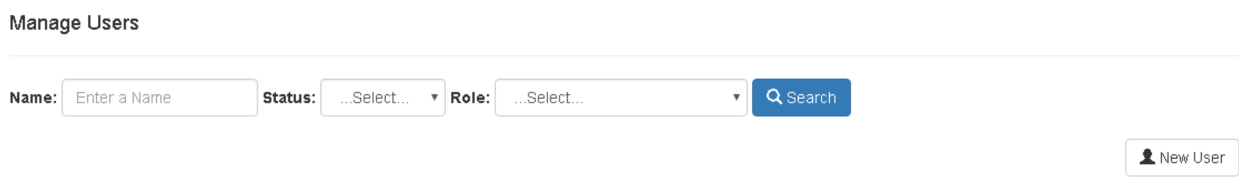
#	Number	Date	Area	Supervisor	Shift	Checks
1	SR201509	11/23/2015	Georgetown	Christian, Leon	06:00 - 14:00	1
2	SR201508	11/18/2015	Georgetown	Christian, Leon	06:00 - 18:00	1
3	SR201506	11/04/2015	Georgetown	Supervisor, Three	18:00 - 06:00	2
4	SR201504	11/03/2015	Georgetown	Supervisors, Oneedit	18:00 - 06:00	2
5	SR201502	11/02/2015	Georgetown	Janitor, Delila	06:00 - 18:00	5
6	SR201503	11/02/2015	Berbice	Supervisor, Two	06:00 - 18:00	2
7	SR201505	11/01/2015	Georgetown	Janitor, Delila	06:00 - 18:00	7

Opening Shift Report record

3. From the form displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

Administrator

This feature is only available to users that have the **Administrator Role**.

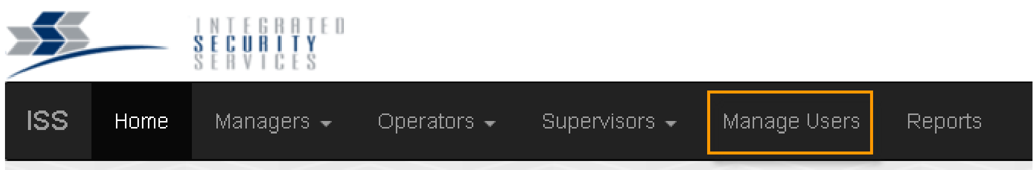


Administrator page

Add New

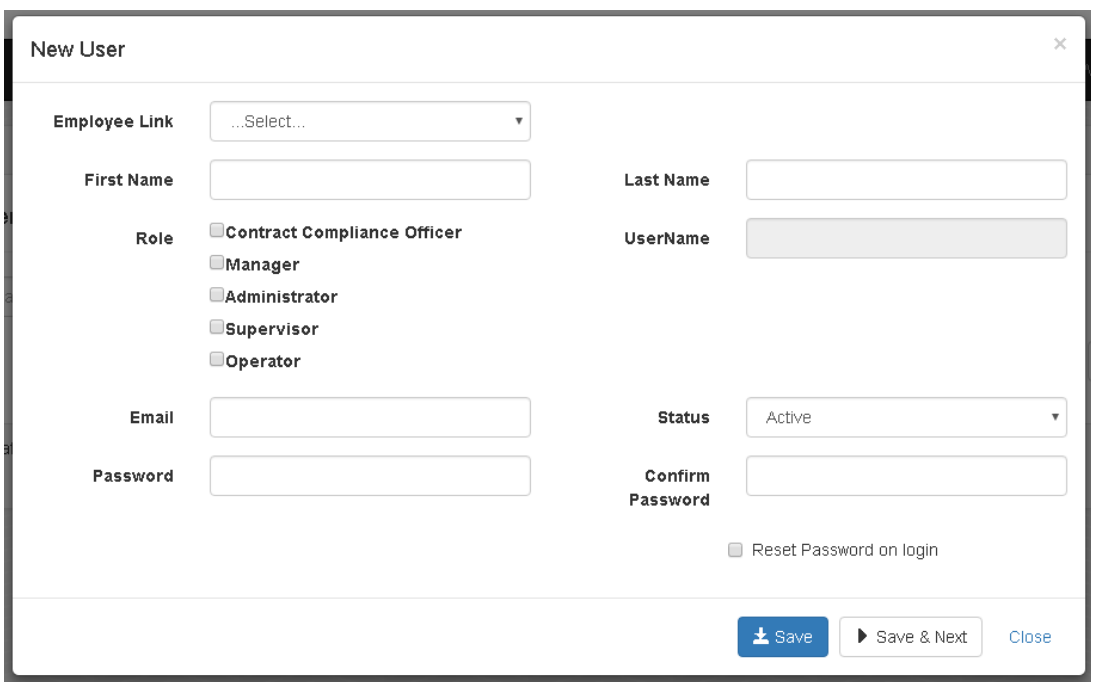
To add a new user, follow the below steps:

1. Click on the **Manage Users** link on the toolbar.



Accessing Manage User page

2. Click on the **New User** button. The following popup is displayed:

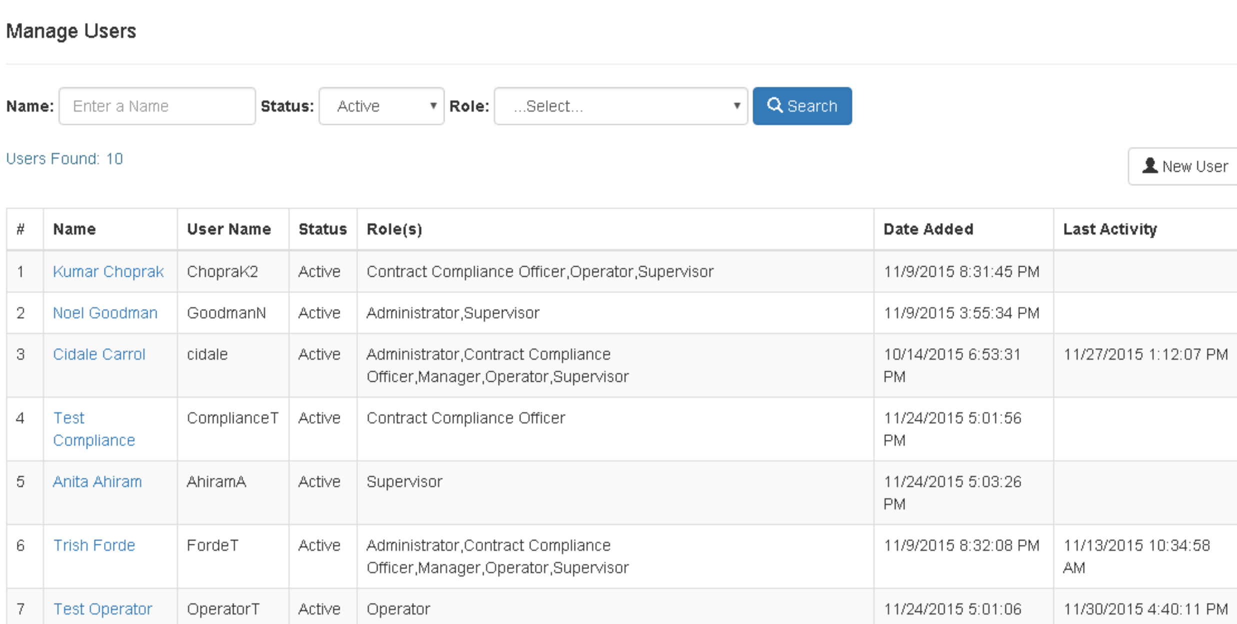


New user window

3. If the user being created is for an employee working at ISS, select their name from the **Employee Link** list. Leave unselected if it is not being created for an employee at ISS.
4. Enter their **First Name**.
5. Enter their **Last Name**.
6. Check the **Role**. This can be one or a combination of the roles.
7. The **UserName** field is auto-completed based on what was entered as the First and Last names. It takes the format of the entire last name with the first letter of the first name. For example, Trish Forde will be **FordeT**.
8. Enter an **Email** address. If not known, enter test@iss.com.
9. Leave **Status** as **Active**.
10. Enter the **Password**. You should use a simple password like **password**. This is because the user will use this to reset their password when they first login to the application.
11. Enter the same value entered in the Password field into the **Confirm Password** field.
12. Check the **Reset Password on login box**.
13. Click **Save** or **Save & Next**.

Search

1. Click **Manage Users** on the toolbar.
2. You can use either one, all, a combination of, or none of the following parameters to search for incidents:
   a. Name
   b. Status
   c. Role
3. Click on the Search button when completed and if any records are found, they will be displayed in a table. NB: If no parameters are entered and the search button is click, all records will return.



#	Name	User Name	Status	Role(s)	Date Added	Last Activity
1	Kumar Choprak	ChoprakK2	Active	Contract Compliance Officer,Operator,Supervisor	11/9/2015 8:31:45 PM	
2	Noel Goodman	GoodmanN	Active	Administrator,Supervisor	11/9/2015 3:55:34 PM	
3	Cidale Carrol	cidale	Active	Administrator,Contract Compliance Officer,Manager,Operator,Supervisor	10/14/2015 6:53:31 PM	11/27/2015 1:12:07 PM
4	Test Compliance	ComplianceT	Active	Contract Compliance Officer	11/24/2015 5:01:56 PM	
5	Anita Ahiram	AhiramA	Active	Supervisor	11/24/2015 5:03:26 PM	
6	Trish Forde	FordeT	Active	Administrator,Contract Compliance Officer,Manager,Operator,Supervisor	11/9/2015 8:32:08 PM	11/13/2015 10:34:58 AM
7	Test Operator	OperatorT	Active	Operator	11/24/2015 5:01:06 PM	11/30/2015 4:40:11 PM

User search results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record is found, click on the **Name** to open.

#	Name	User Name	Status	Role(s)	Date Added	Last Activity
1	Kumar Choprak	ChoprakK2	Active	Contract Compliance Officer,Operator,Supervisor	11/9/2015 8:31:45 PM	
2	Noel Goodman	GoodmanN	Active	Administrator,Supervisor	11/9/2015 3:55:34 PM	
3	Cidale Carrol	cidale	Active	Administrator,Contract Compliance Officer,Manager,Operator,Supervisor	10/14/2015 6:53:31 PM	11/27/2015 1:12:07 PM
4	Test Compliance	ComplianceT	Active	Contract Compliance Officer	11/24/2015 5:01:56 PM	
5	Anita Ahiram	AhiramA	Active	Supervisor	11/24/2015 5:03:26 PM	
6	Trish Forde	FordeT	Active	Administrator,Contract Compliance Officer,Manager,Operator,Supervisor	11/9/2015 8:32:08 PM	11/13/2015 10:34:58 AM
7	Test Operator	OperatorT	Active	Operator	11/24/2015 5:01:06 PM	11/30/2015 4:40:11 PM
8	John Frans	FransJ	Active	Administrator,Contract Compliance Officer,Manager,Operator,Supervisor	11/9/2015 3:26:33 PM	
9	Satesh Persaud	satesh	Active	Administrator,Manager	10/14/2015 6:53:58	11/28/2015 2:50:46 PM

Opening a user record

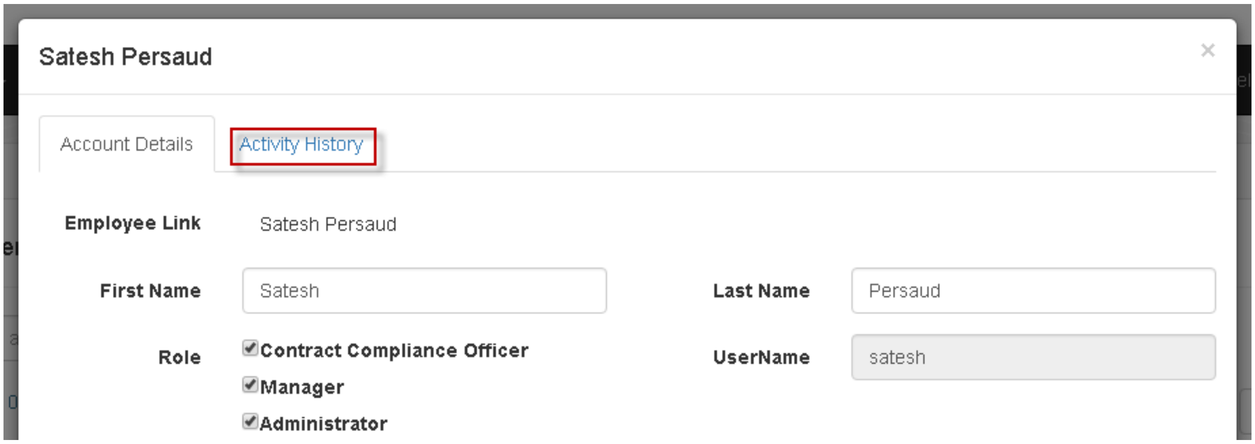
3. From the window displayed, make changes as need and then click on the **Update** button.
4. To return to the search page, click on the **Close** button.

Reset Password

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record is found, click on the **Name** to open.
3. Enter the **Password**. You should use a simple password like **password**. This is because the user will use this to reset their password when they first login to the application.
4. Enter the same value entered in the Password field into the **Confirm Password** field.
5. Check the **Reset Password on login box**.
6. Click on the **Update** button to save the change.
7. Inform the user of the password you entered and have them login and set a new password.

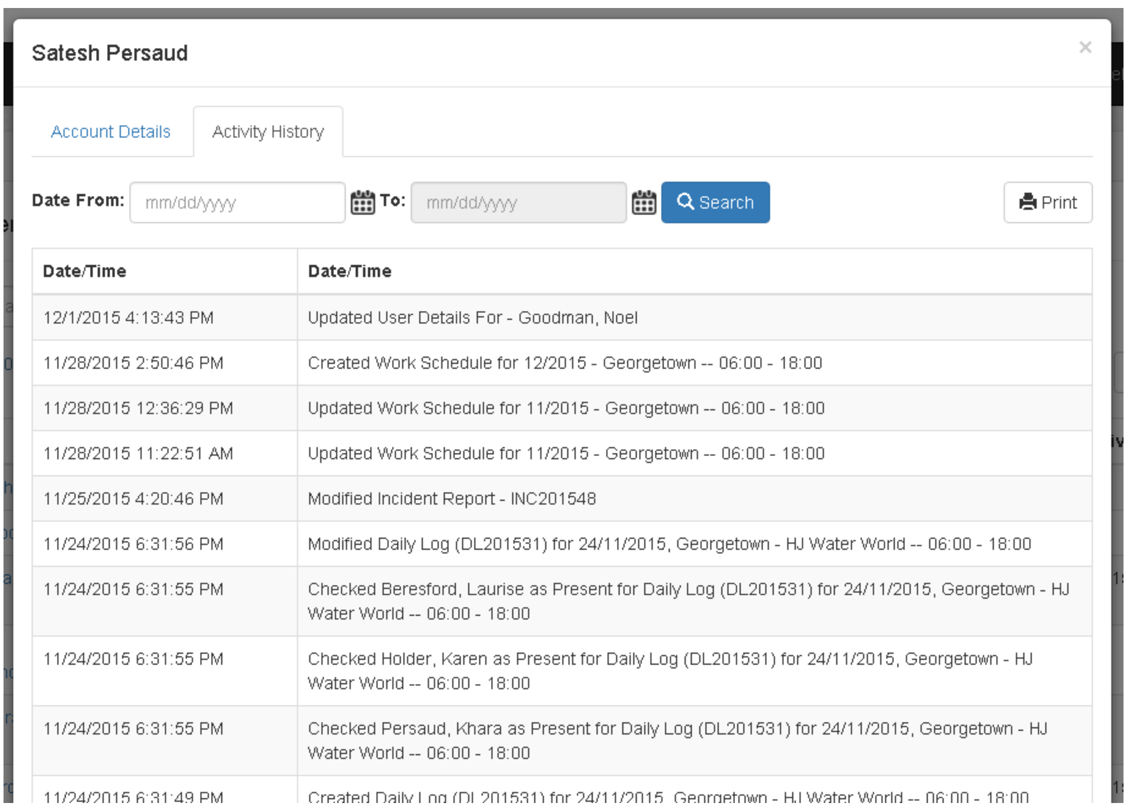
View User's Activity History

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record is found, click on the **Name** to open.
3. From the window that pops up, click on the Activity History tab.



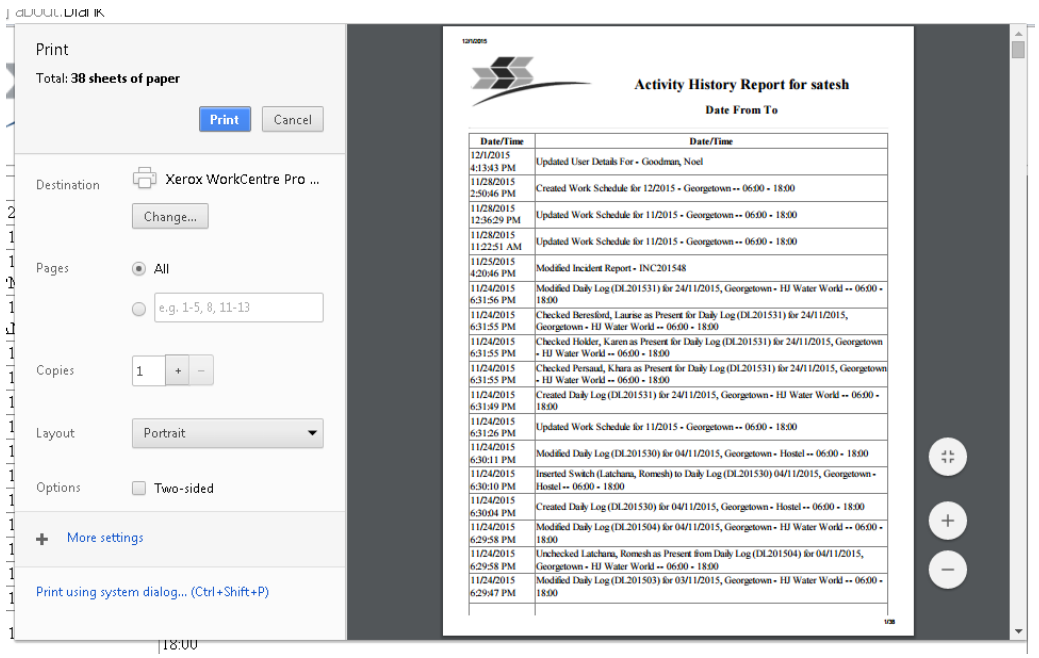
Activity History tab

4. From this screen, you can search for activity between a **date range** or leave the dates blank to bring back all history.
5. Click the **Search** button.
6. If records are found, they will be displayed in a table:



User activity search results

7. Click on the print button if you would like to print a copy of the history.



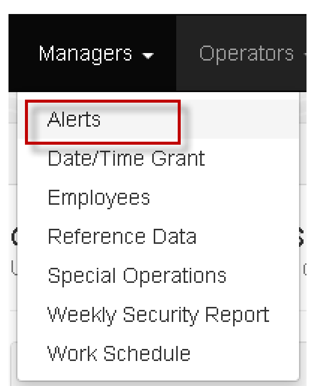
User history print preview

Managers

Only users with the Manager role have access to these features.

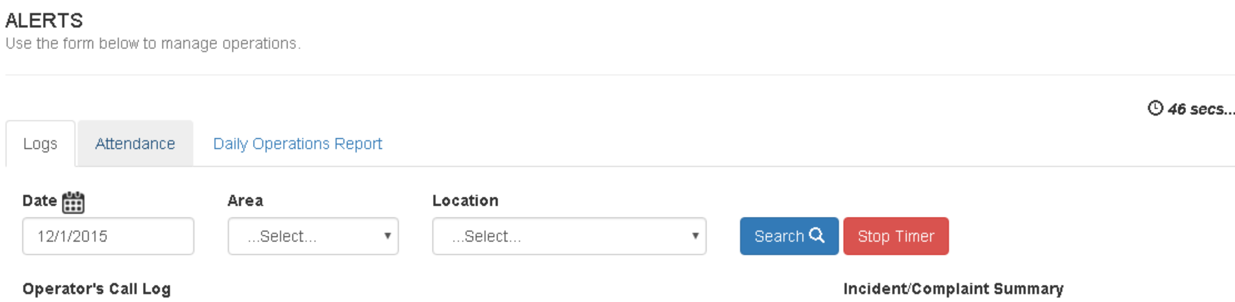
Alerts

1. Click on **Managers** -> **Alerts**



Accessing the Alerts page

2. The Logs and Attendance tabs refresh every 60 seconds. You can follow the countdown at the top of the page for an indication of the next refresh.



Alerts Page

3. The **Stop Timer** button is used to stop the countdown timer. To restart, click on the **Start Timer** button.

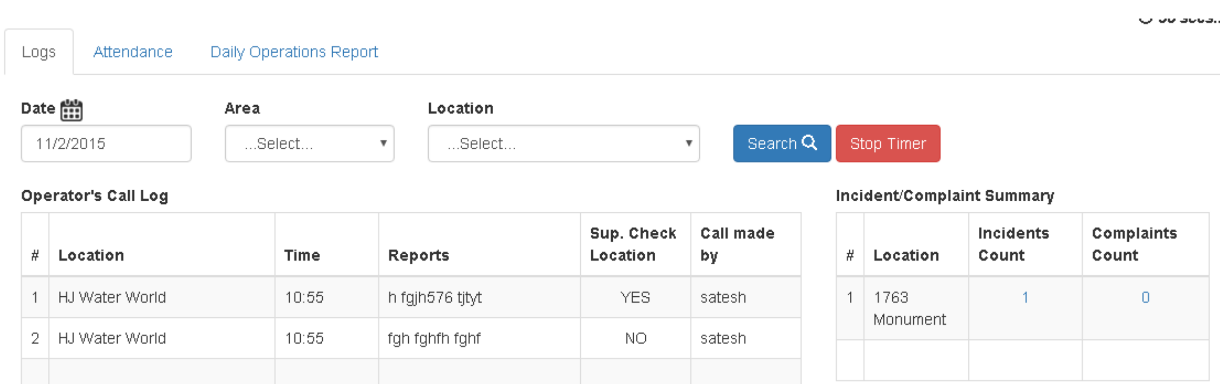
Logs

The Logs are used to show the Operators' call log and Incident/Complaint Summary

1. Click on **Managers** -> **Alerts**
2. The Log tab is displayed by default. If it is not selected, click on the **Log** tab to view.
3. You can use one, all, or a combination of the following to filter the entries under the logs:
   a. Date
   b. Area
   c. Location

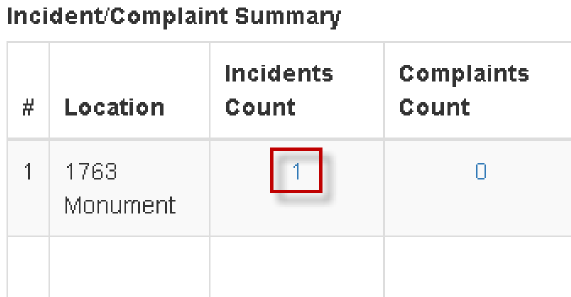
   By default, the date is set to the current day.

4. Enter the parameter as needed and then click on the Search button or wait for the next refresh.



Logs tab

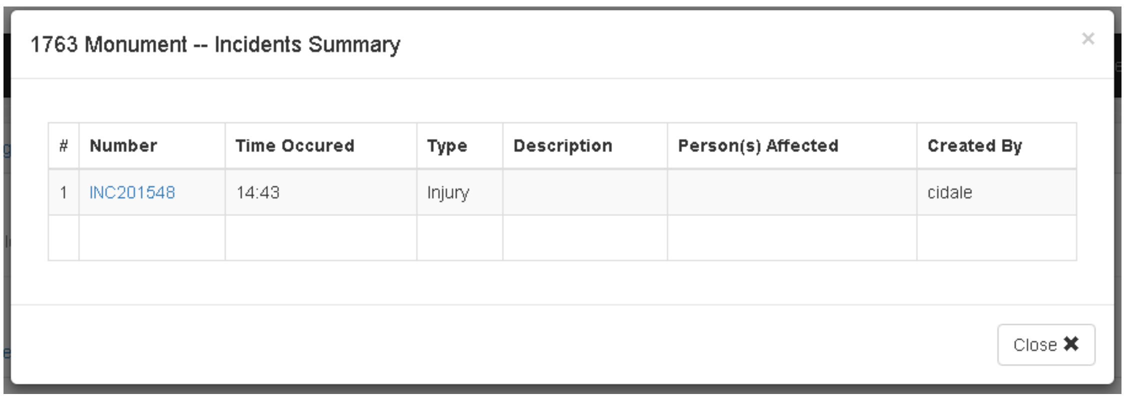
5. To view the details of the incidents or complaints count, click on the number:


Incident/Complaint Summary

#	Location	Incidents Count	Complaints Count
1	1763 Monument	1	0

Opening Incidents/Complaints

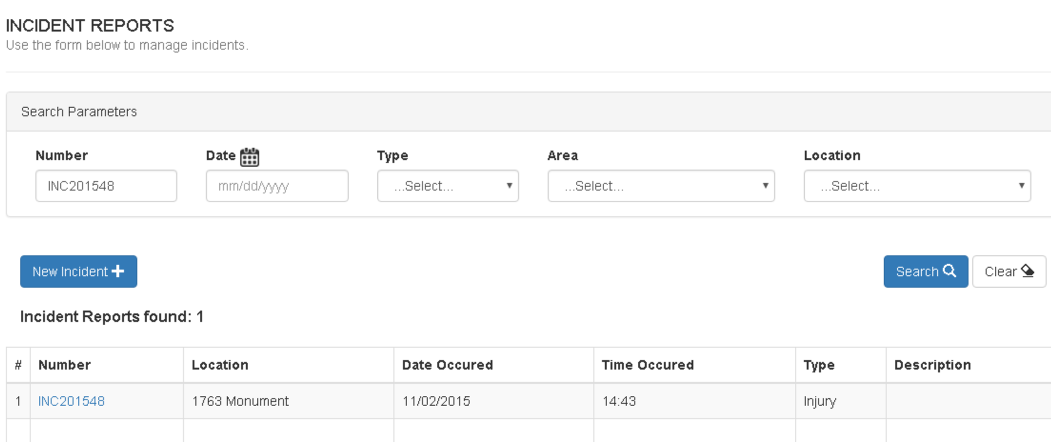
6. The following window will be displayed:


1763 Monument -- Incidents Summary

#	Number	Time Occured	Type	Description	Person(s) Affected	Created By
1	INC201548	14:43	Injury			cidale

Incidents Summary view

7. From here, you can click on the **Number** and the record will open in the search section of the Incident/Complaint form. For example, the incident in the figure above will open in the search section of the Incidents Page:



#	Number	Location	Date Occured	Time Occured	Type	Description
1	INC201548	1763 Monument	11/02/2015	14:43	Injury	

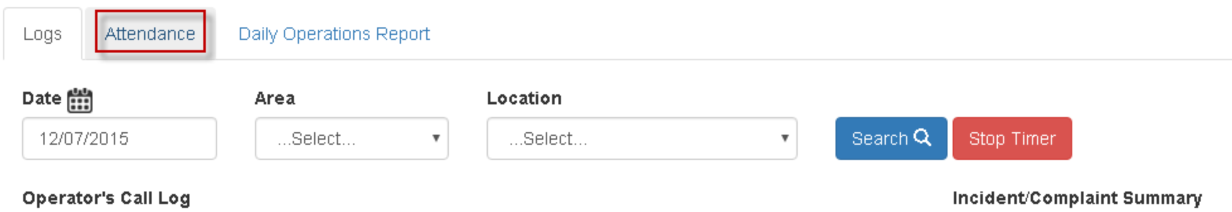
Incident view

8. From here, click on the Number again to view the details.

Attendance

Here you will view details of the attendance of employees at the various areas.

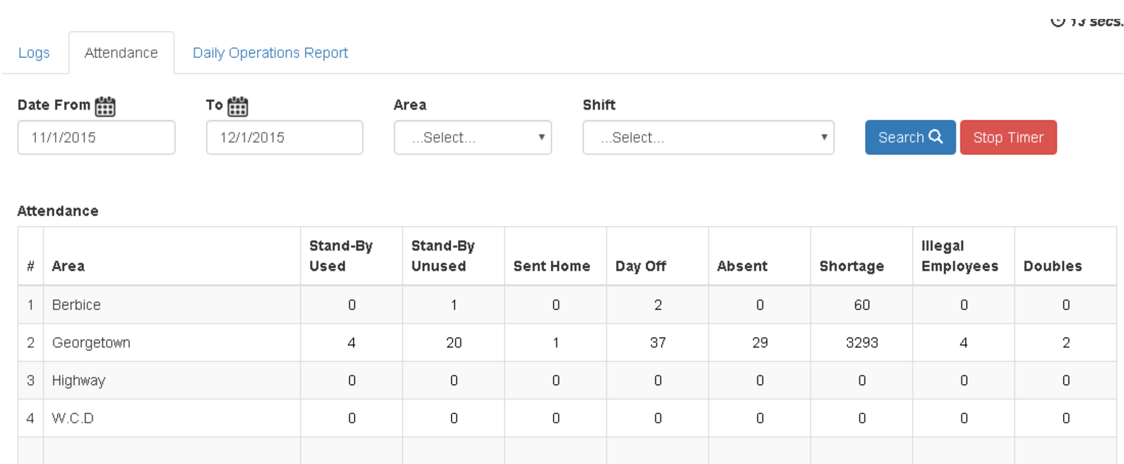
1. Click on **Managers** -> **Alerts**
2. Click on the **Attendance** tab.



Opening the Attendance tab

3. You can use one, all, or a combination of the following to filter the entries under the logs:
   a. Date From
   b. Date To
   c. Area
   d. Shift

   By default, the **Date From** and **To** are set to the current day.
4. Enter the parameter as needed and then click on the **Search** button or wait for the next refresh.



#	Area	Stand-By Used	Stand-By Unused	Sent Home	Day Off	Absent	Shortage	Illegal Employees	Doubles
1	Berbice	0	1	0	2	0	60	0	0
2	Georgetown	4	20	1	37	29	3293	4	2
3	Highway	0	0	0	0	0	0	0	0
4	W.C.D	0	0	0	0	0	0	0	0

Attendance tab

5. Information is displayed by:
   a. Area
   b. Standby Used
   c. Standby Unused

d. Sent Home
e. Day Off
f. Absent
g. Shortage
h. Illegal Employees
i. Doubles

6. To view details on the information presented, click on the number:

Attendance

#	Area	Stand-By Used	Stand-By Unused	Sent Home	Day Off	Absent	Shortage	Illegal Employees	Doubles
1	Berbice	0	1	0	2	0	60	0	0
2	Georgetown	4	20	1	37	29	3293	4	2
3	Highway	0	0	0	0	0	0	0	0
4	W.C.D	0	0	0	0	0	0	0	0

Opening the Absent details

7. A window will pop up with the details:

Georgetown -- Absence Details

#	Location Assigned	Name	Was Called In	Reason	Date	Shift
1	1763 Monument	Deane, Dawn	NO		11/19/2015	06:00 - 18:00
2		Forde, Jenifer	NO		11/19/2015	06:00 - 18:00
3		Deane, Dawn	NO		11/30/2015	06:00 - 18:00
4		Forde, Jenifer	NO		11/30/2015	06:00 - 18:00
5	Burrows School of Arts	Marks, Monifa	YES	Illness	11/01/2015	06:00 - 18:00
6		Phillips, Candace	NO		11/23/2015	06:00 - 18:00
7		Parris, Jane	NO		11/23/2015	06:00 - 18:00
8	HJ Water World	Beresford, Laurise	NO		11/01/2015	06:00 - 18:00
9			NO		11/02/2015	06:00 - 18:00
10		Tappin, Malcom	NO		11/02/2015	18:00 - 06:00

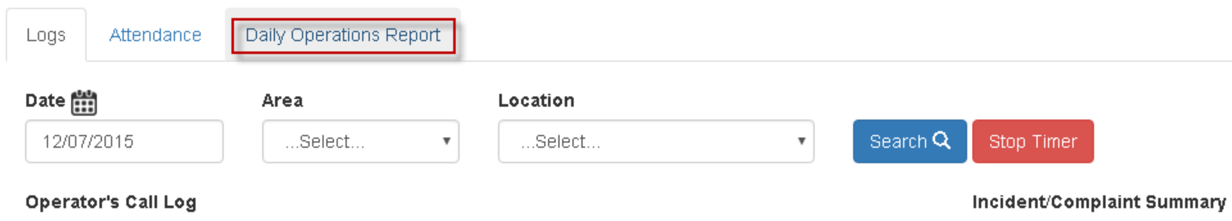
Close ✖

Absent details

Daily Operations Report

This shows the operations report.

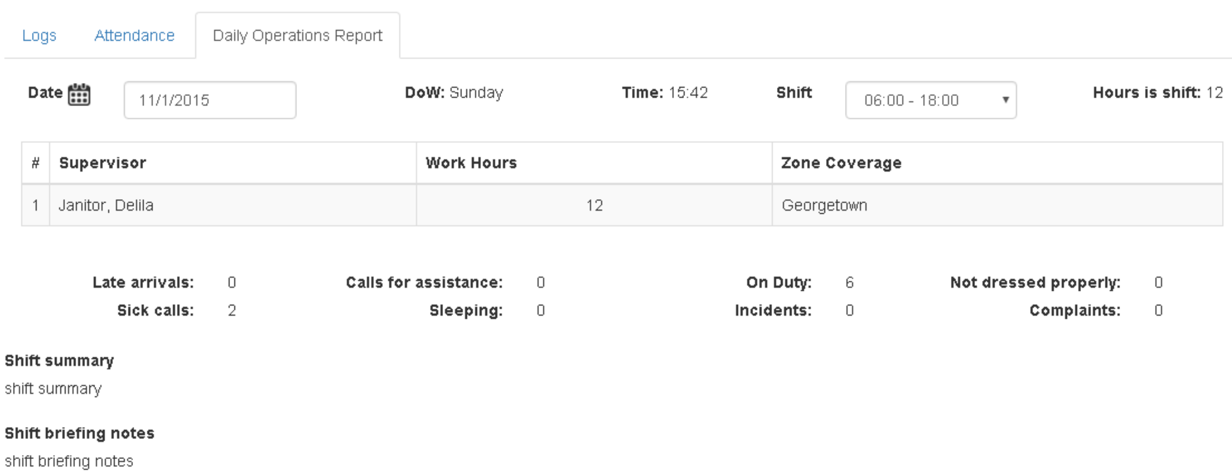
1. Click on **Managers** -> **Alerts**
2. Click on the **Daily Operations Report** tab.



Opening the Daily Operations Report tab

3. You all of the following to filter the entries to filter the reports:
   a. Date
   b. Shift

   By default, the **Date** is set to the previous day.
4. After selecting the **Shift**, the report will be filled if any details are found:



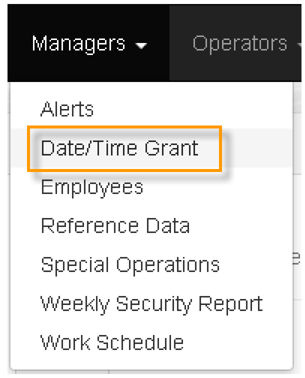
Daily Operations report

Date/Time Grant

This page is used to give Operators access to change the Date and/or time fields on the following forms:

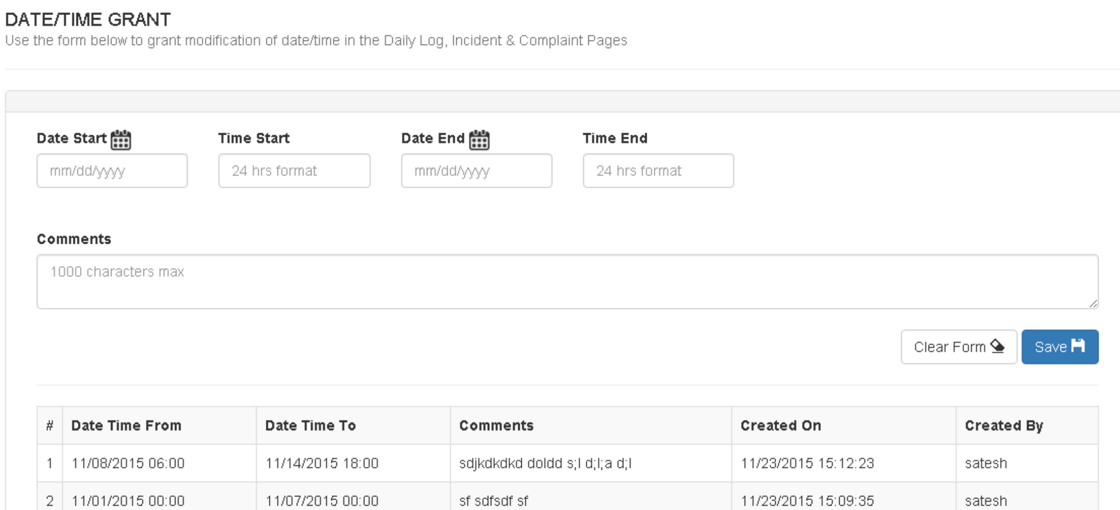
1. Daily Log
2. Call In Absent
3. Complaints
4. Incidents

1. Click on **Managers** -> **Date/Time Grant**



Accessing Date/time grant

2. The following page is displayed:



Date/Time grant page

3. From here:
    a. Enter the **Date Start**
    b. Enter **Time Start**
    c. Enter **Date End**
    d. Enter **Time End**
    e. Enter **Comments**
4. Click the **Save** button.
5. The record added will be displayed in a table:

#	Date Time From	Date Time To	Comments	Created On	Created By
1	11/08/2015 06:00	11/14/2015 18:00	sdjkdkdkd doldd s;l d;l;a d;l	11/23/2015 15:12:23	satesh
2	11/01/2015 00:00	11/07/2015 00:00	sf sdfsdf sf	11/23/2015 15:09:35	satesh

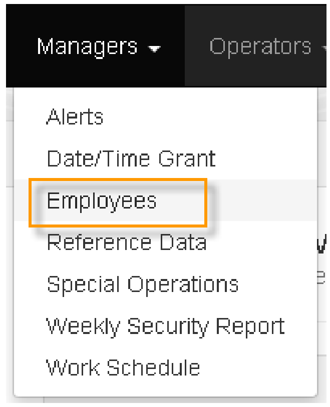
Date/time grant view

Employees

Add New

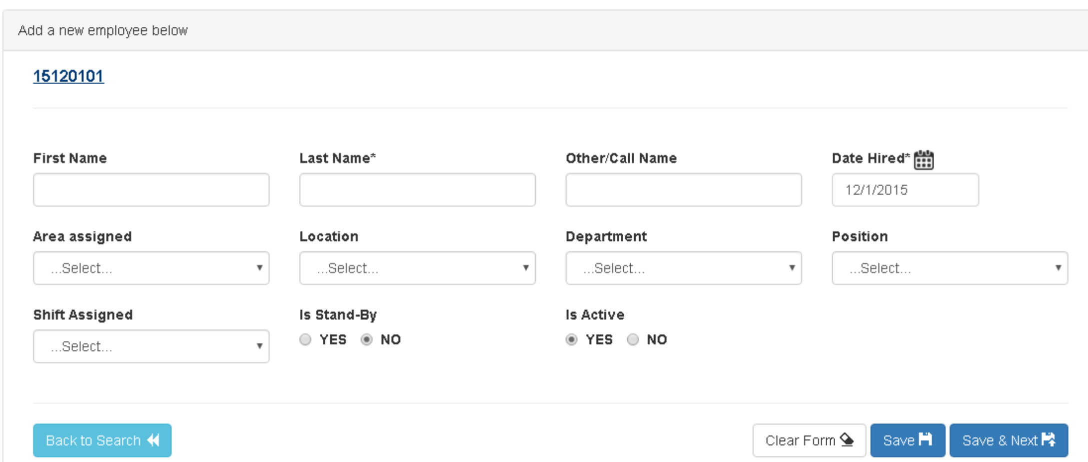
To add a new employee record, follow the below steps:

1. Click **Managers -> Employees**



Accessing the Employees page

2. On the page that is displayed, click on the **New Employee** button.



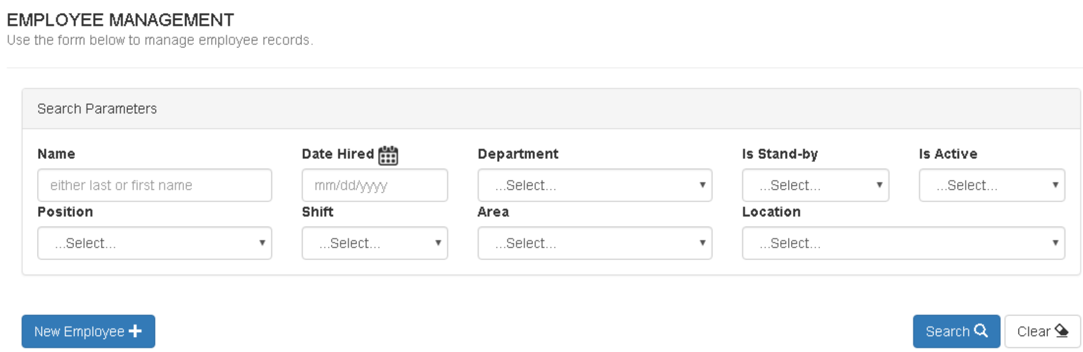
Employees form

3. The Employee number is auto-generated.
4. Enter **First Name**. This can be left blank if the employee does not have a first name.
5. Enter **Last Name**.
6. Enter **Other Name**, if known.
7. Specify **Date Hired**.
8. Select **Area** Assigned.
9. Select **Location**.
10. Select **Department**.

11. Select **Position**.
12. Select **Shift** Assigned.
13. Check **YES** if employee is a Standby or **NO** if not.
14. Check **YES** if employee is active or **NO** if not.
15. Click **Save** or **Save & Next** to complete.

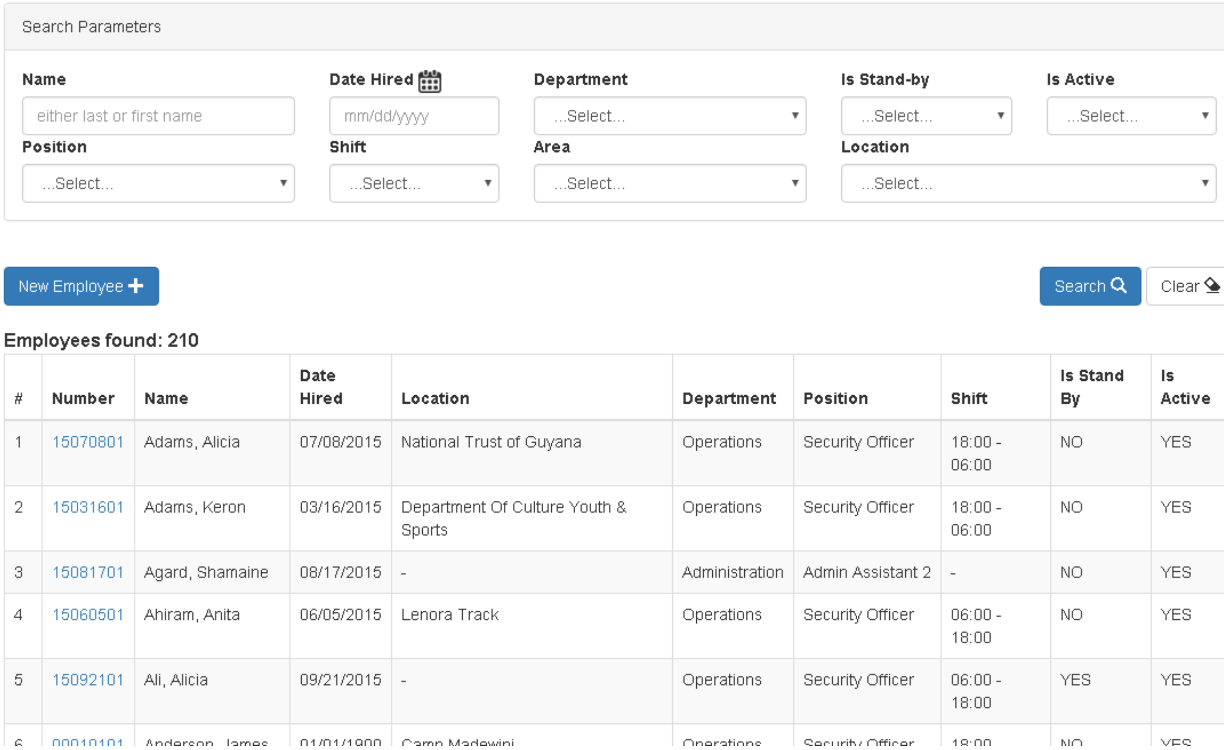
Search

1. Click **Managers -> Employees**



Employee search form

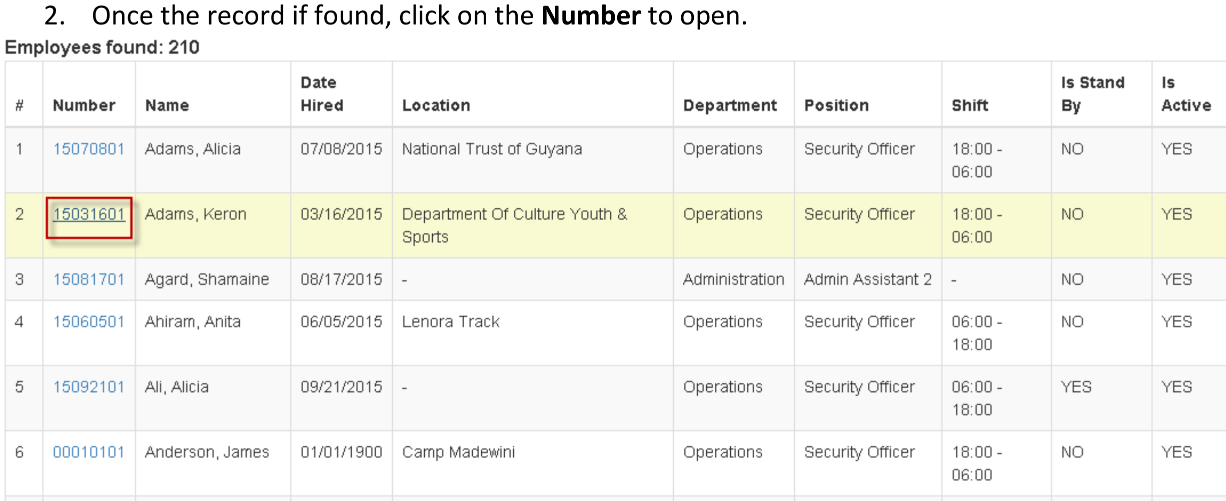
1. You can use either one, all, a combination of, or none of the following parameters to search for incidents:
   a. Name
   b. Date Hired
   c. Department
   d. Is Standby
   e. Is Active
   f. Position
   g. Shift
   h. Area
   i. Location
2. Click on the Search button when completed and if any records are found, they will be displayed in a table. <u>NB: If no parameters are entered and the search button is click, all records will return.</u>



Employee search results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on the **Number** to open.

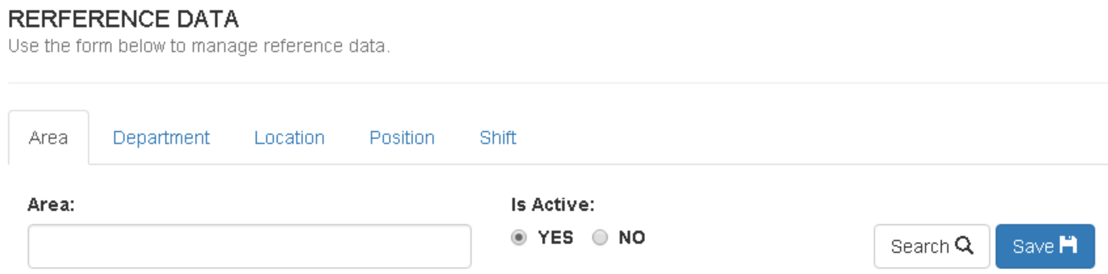


Opening an employee record

3. From the page displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

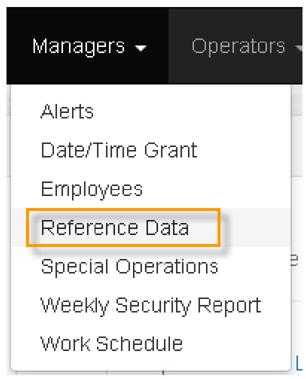
Reference Data

This is where you add data to be displayed in the drop down list boxes. These include Area, Department, Location, Position and Shift.



Reference data page

1. Click **Managers -> Reference Data**

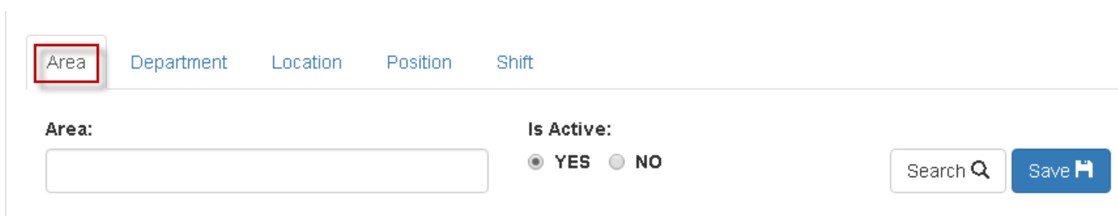


Accessing the reference data page

Area

Add New

1. Click on the **Area** tab, if not already selected.



Area tab

2. Add a new entry by entering the **Area** and then clicking the **Save** button.

Search

1. Click on the **Area** tab, if not already selected.
2. Enter the search text in the **Area** text box. To search for all records, leave the search text blank.

3. Click on the Search button. The records will be displayed in a table:

Areas found: 5

#	Area	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Berbice	YES	cidale	09/30/2015 13:52:05	satesh	11/21/2015 12:51:14
2	Highway	YES	cidale	09/30/2015 13:52:05		
3	W.C.D	YES	cidale	09/30/2015 13:52:05	satesh	11/21/2015 12:48:52
4	Georgetown	YES	cidale	09/30/2015 13:52:05		
5	E.C.D	NO	cidale	09/30/2015 13:52:05	satesh	11/21/2015 14:57:16

Area search results

Modify

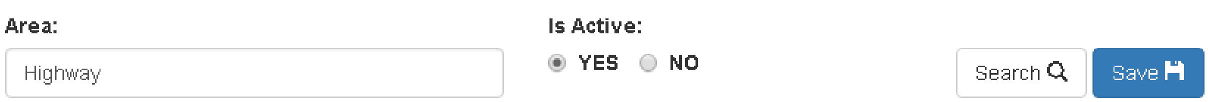
1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on the **Area** to open.

Areas found: 5

#	Area	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Berbice	YES	cidale	09/30/2015 13:52:05	satesh	11/21/2015 12:51:14
2	Highway	YES	cidale	09/30/2015 13:52:05		
3	W.C.D	YES	cidale	09/30/2015 13:52:05	satesh	11/21/2015 12:48:52
4	Georgetown	YES	cidale	09/30/2015 13:52:05		
5	E.C.D	NO	cidale	09/30/2015 13:52:05	satesh	11/21/2015 14:57:16

Opening an Area record

3. The fields will be populated



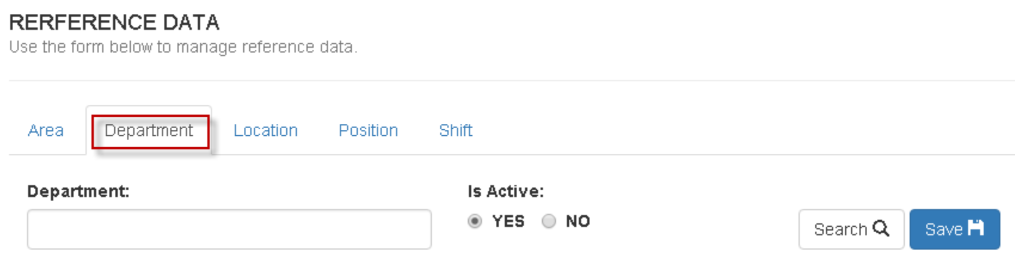
Updating an Area record

4. Make changes as needed and click on the **Save** button to complete.
5. NB: Checking **NO** under **Is Active** will prevent the record from being displayed in drop down list boxes.

Department

Add New

1. Click on the **Department** tab, if not already selected.

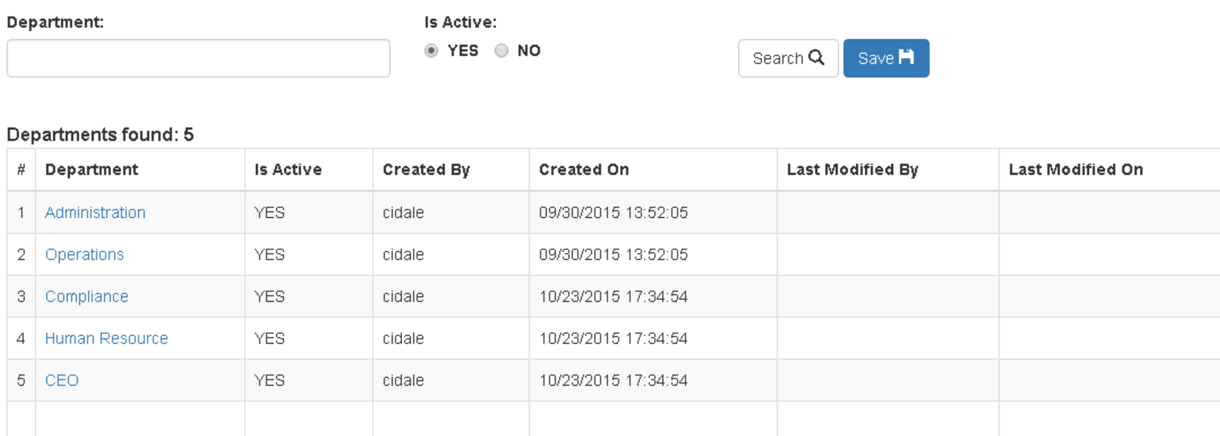


Department tab

2. Add a new entry by entering the **Department** and then clicking the **Save** button.

Search

1. Click on the **Department** tab, if not already selected.
2. Enter the search text in the **Department** text box. To search for all records, leave the search text blank.
3. Click on the Search button. The records will be displayed in a table:



#	Department	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Administration	YES	cidale	09/30/2015 13:52:05		
2	Operations	YES	cidale	09/30/2015 13:52:05		
3	Compliance	YES	cidale	10/23/2015 17:34:54		
4	Human Resource	YES	cidale	10/23/2015 17:34:54		
5	CEO	YES	cidale	10/23/2015 17:34:54		

Department search results

Modify

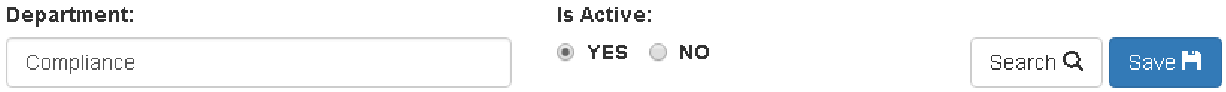
1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on the **Department** to open.

Departments found: 5

#	Department	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Administration	YES	cidale	09/30/2015 13:52:05		
2	Operations	YES	cidale	09/30/2015 13:52:05		
3	Compliance	YES	cidale	10/23/2015 17:34:54		
4	Human Resource	YES	cidale	10/23/2015 17:34:54		
5	CEO	YES	cidale	10/23/2015 17:34:54		

Opening a Department record

3. The fields will be populated



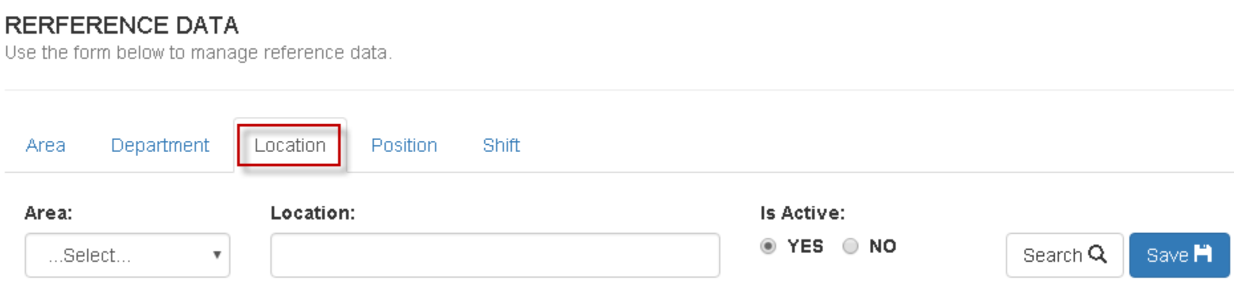
Updating a department record

4. Make changes as needed and click on the **Save** button to complete.
5. NB: Checking **NO** under **Is Active** will prevent the record from being displayed in drop down list boxes.

Location

Add New

1. Click on the **Department** tab, if not already selected.



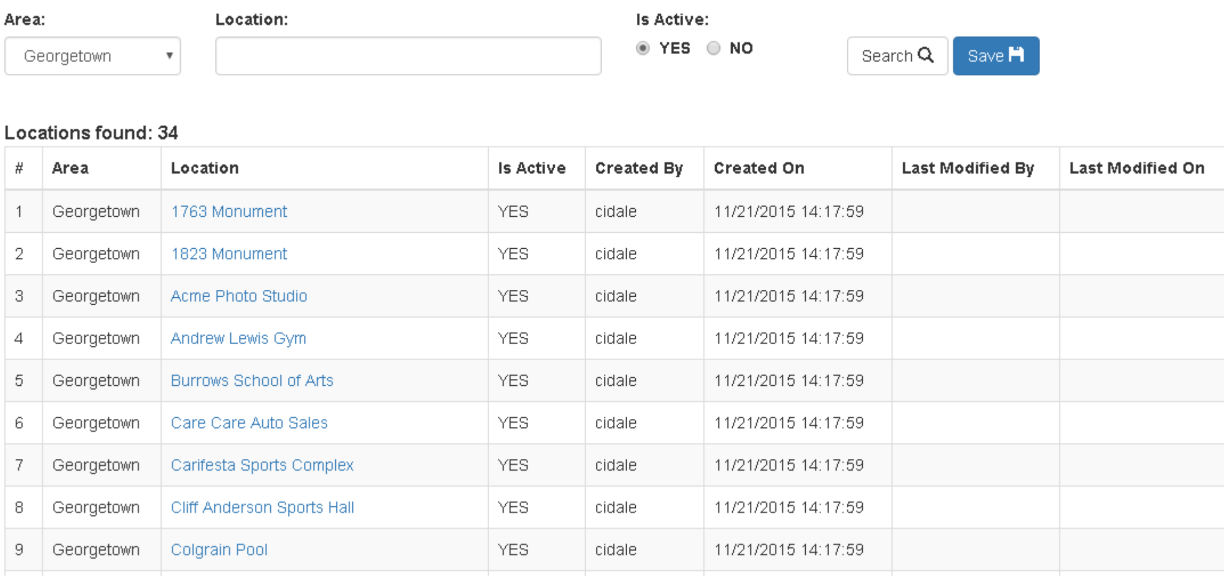
Location tab

2. Add a new entry by
   a. Select the **Area**
   b. Enter the **Location**
   c. Clicking the **Save** button.

Search

1. Click on the **Location** tab, if not already selected.

2. Select the **Area** and/or enter the search text in the **Location** text box. To search for all records, leave the search text blank.
3. Click on the **Search** button. The records will be displayed in a table:



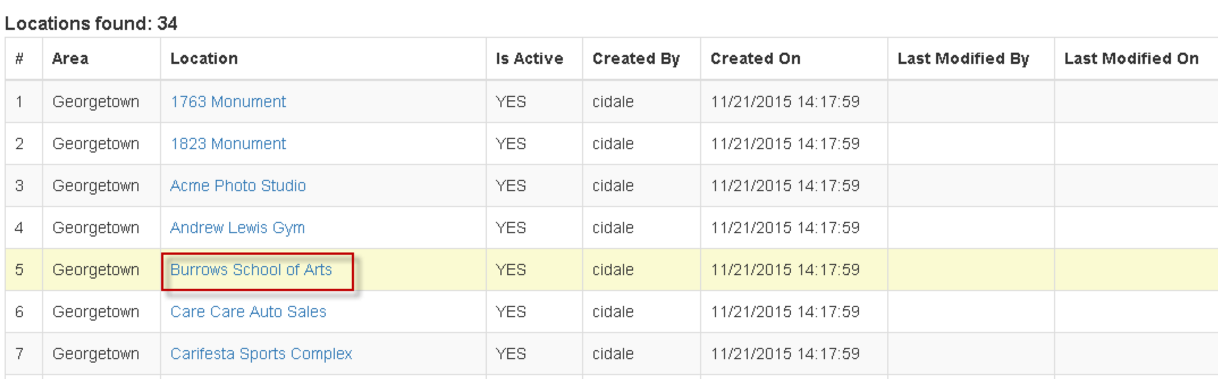
Locations found: 34

#	Area	Location	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Georgetown	1763 Monument	YES	cidale	11/21/2015 14:17:59		
2	Georgetown	1823 Monument	YES	cidale	11/21/2015 14:17:59		
3	Georgetown	Acme Photo Studio	YES	cidale	11/21/2015 14:17:59		
4	Georgetown	Andrew Lewis Gym	YES	cidale	11/21/2015 14:17:59		
5	Georgetown	Burrows School of Arts	YES	cidale	11/21/2015 14:17:59		
6	Georgetown	Care Care Auto Sales	YES	cidale	11/21/2015 14:17:59		
7	Georgetown	Carifesta Sports Complex	YES	cidale	11/21/2015 14:17:59		
8	Georgetown	Cliff Anderson Sports Hall	YES	cidale	11/21/2015 14:17:59		
9	Georgetown	Colgrain Pool	YES	cidale	11/21/2015 14:17:59		

Location search results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on the **Location** to open.



Locations found: 34

#	Area	Location	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Georgetown	1763 Monument	YES	cidale	11/21/2015 14:17:59		
2	Georgetown	1823 Monument	YES	cidale	11/21/2015 14:17:59		
3	Georgetown	Acme Photo Studio	YES	cidale	11/21/2015 14:17:59		
4	Georgetown	Andrew Lewis Gym	YES	cidale	11/21/2015 14:17:59		
5	Georgetown	Burrows School of Arts	YES	cidale	11/21/2015 14:17:59		
6	Georgetown	Care Care Auto Sales	YES	cidale	11/21/2015 14:17:59		
7	Georgetown	Carifesta Sports Complex	YES	cidale	11/21/2015 14:17:59		

Opening a Location record

3. The fields will be populated

Updating a Location record

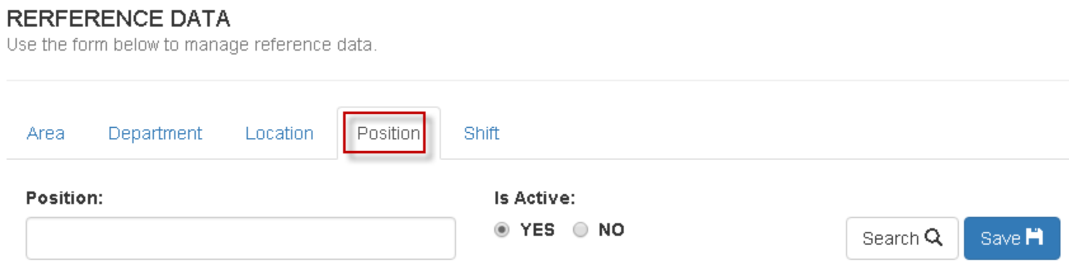
4. Make changes as needed and click on the **Save** button to complete.

5. NB: Checking **NO** under **Is Active** will prevent the record from being displayed in drop down list boxes.

Position

Add New

1. Click on the **Position** tab, if not already selected.

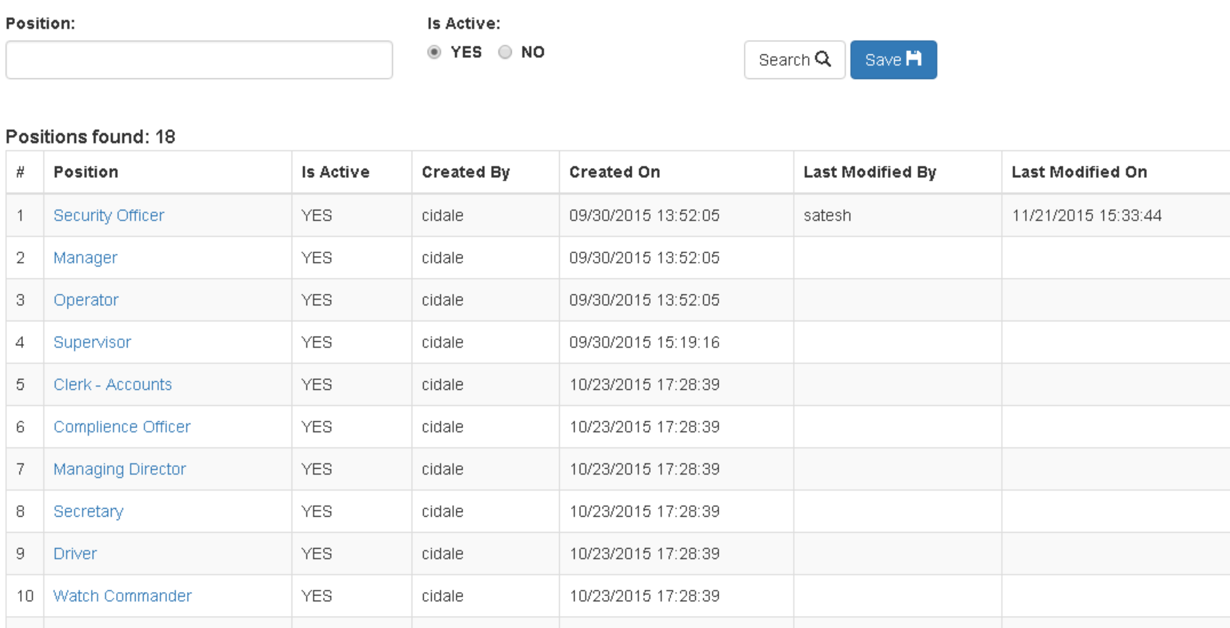


Position tab

2. Add a new entry by entering the **Position** and then click on the **Save** button.

Search

1. Click on the **Position** tab, if not already selected.
2. Enter the search text in the **Position** text box. To search for all records, leave the search text blank.
3. Click on the **Search** button. The records will be displayed in a table:



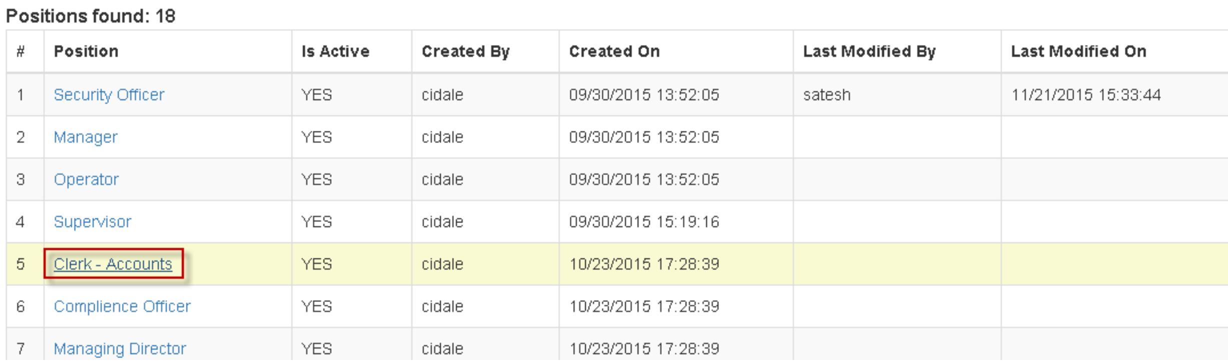
Positions found: 18

#	Position	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Security Officer	YES	cidale	09/30/2015 13:52:05	satesh	11/21/2015 15:33:44
2	Manager	YES	cidale	09/30/2015 13:52:05		
3	Operator	YES	cidale	09/30/2015 13:52:05		
4	Supervisor	YES	cidale	09/30/2015 15:19:16		
5	Clerk - Accounts	YES	cidale	10/23/2015 17:28:39		
6	Complience Officer	YES	cidale	10/23/2015 17:28:39		
7	Managing Director	YES	cidale	10/23/2015 17:28:39		
8	Secretary	YES	cidale	10/23/2015 17:28:39		
9	Driver	YES	cidale	10/23/2015 17:28:39		
10	Watch Commander	YES	cidale	10/23/2015 17:28:39		
11	Coordinating Manager	YES	cidale	10/23/2015 17:28:39		

Position search results

Modify

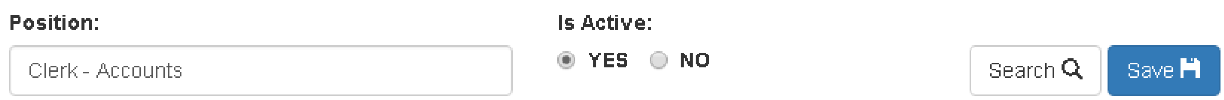
1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on the **Position** to open.


Positions found: 18

#	Position	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Security Officer	YES	cidale	09/30/2015 13:52:05	satesh	11/21/2015 15:33:44
2	Manager	YES	cidale	09/30/2015 13:52:05		
3	Operator	YES	cidale	09/30/2015 13:52:05		
4	Supervisor	YES	cidale	09/30/2015 15:19:16		
5	Clerk - Accounts	YES	cidale	10/23/2015 17:28:39		
6	Complience Officer	YES	cidale	10/23/2015 17:28:39		
7	Managing Director	YES	cidale	10/23/2015 17:28:39		

Opening a Position record

3. The fields will be populated



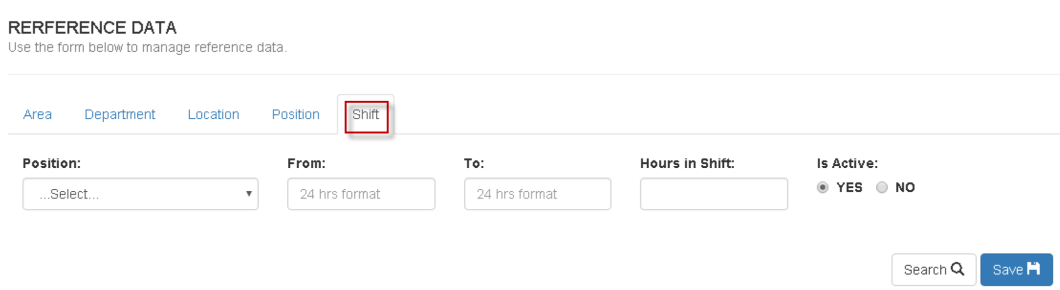
Updating a Position record

4. Make changes as needed and click on the **Save** button to complete.
5. NB: Checking **NO** under **Is Active** will prevent the record from being displayed in drop down list boxes.

Shift

Add New

1. Click on the **Shift** tab, if not already selected.



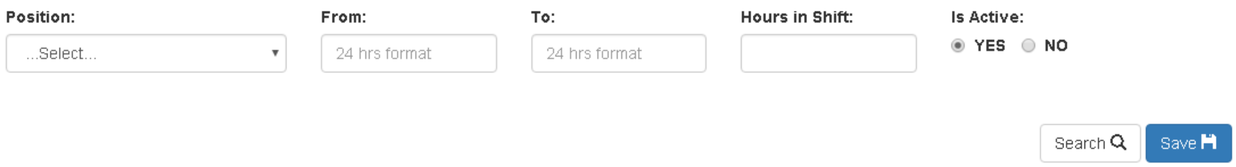
Shifts tab

2. Add a new entry by
   a. Select the **Position**
   b. Enter the **From Time**
   c. Enter the **To** Time
   d. Enter the **Hours in Shift**

e. Clicking the **Save** button.

Search

1. Click on the **Shift** tab, if not already selected.
2. Select the **Position** and/or enter the search text in the **From or To** time text box. To search for all records, leave the search text blank.
3. Click on the **Search** button. The records will be displayed in a table:



Shifts found: 11

#	Position	Shift	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Accountant	06:00 - 14:00	YES	satesh	11/23/2015 10:14:18		
2	Operator	06:00 - 14:00	YES	cidale	09/30/2015 15:19:16		
3	Operator	14:00 - 22:00	YES	cidale	09/30/2015 15:19:16		
4	Operator	22:00 - 06:00	YES	cidale	09/30/2015 15:19:16	satesh	11/21/2015 16:32:21
5	Security Officer	06:00 - 18:00	YES	cidale	09/30/2015 15:19:16		
6	Security Officer	06:00 - 14:00	YES	satesh	11/21/2015 16:33:23	satesh	11/21/2015 16:33:33
7	Security Officer	18:00 - 06:00	YES	cidale	09/30/2015 15:19:16		
8	Security Officer	22:00 - 06:00	YES	cidale	10/20/2015 15:19:16		
9	Supervisor	06:00 - 18:00	YES	cidale	09/30/2015 15:19:16		
10	Supervisor	18:00 - 06:00	YES	cidale	09/30/2015 15:19:16		

Shift search results

Modify

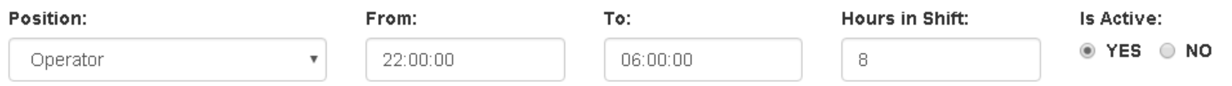
1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on the **Shift** to open.

Shifts found: 11

#	Position	Shift	Is Active	Created By	Created On	Last Modified By	Last Modified On
1	Accountant	06:00 - 14:00	YES	satesh	11/23/2015 10:14:18		
2	Operator	06:00 - 14:00	YES	cidale	09/30/2015 15:19:16		
3	Operator	14:00 - 22:00	YES	cidale	09/30/2015 15:19:16		
4	Operator	22:00 - 06:00	YES	cidale	09/30/2015 15:19:16	satesh	11/21/2015 16:32:21
5	Security Officer	06:00 - 18:00	YES	cidale	09/30/2015 15:19:16		
6	Security Officer	06:00 - 14:00	YES	satesh	11/21/2015 16:33:23	satesh	11/21/2015 16:33:33
7	Security Officer	18:00 - 06:00	YES	cidale	09/30/2015 15:19:16		

Opening a shift record

3. The fields will be populated



Updating a shift record

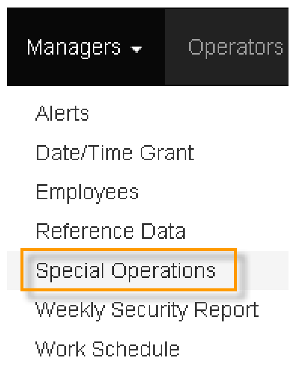
4. Make changes as needed and click on the **Save** button to complete.
5. NB: Checking **NO** under **Is Active** will prevent the record from being displayed in drop down list boxes.

Special Operations

Add New

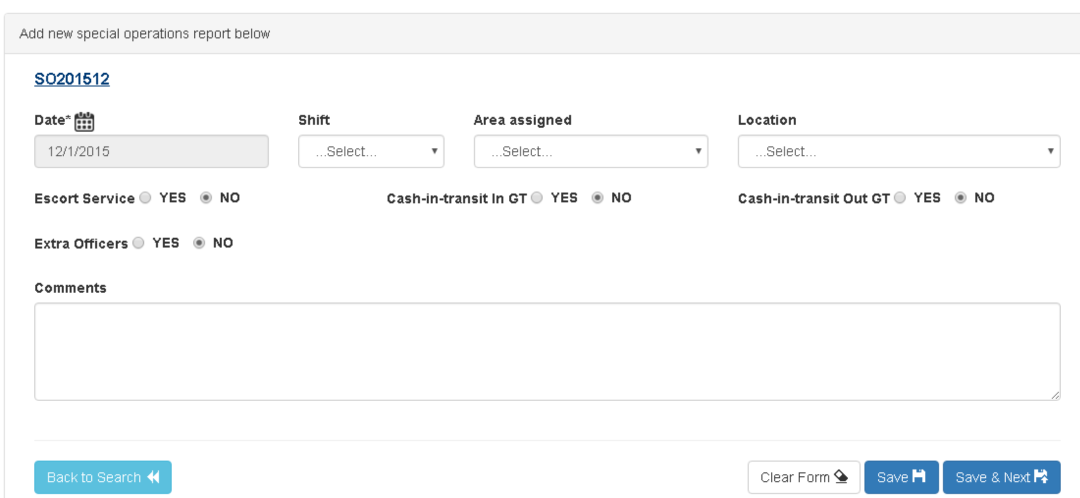
To add a new special operation, follow the below steps:

1. Click **Managers -> Special Operations**



Accessing the Special Operations page

2. On the page that is displayed, click on the **New SO** button. The following page is displayed:



Special Operations form

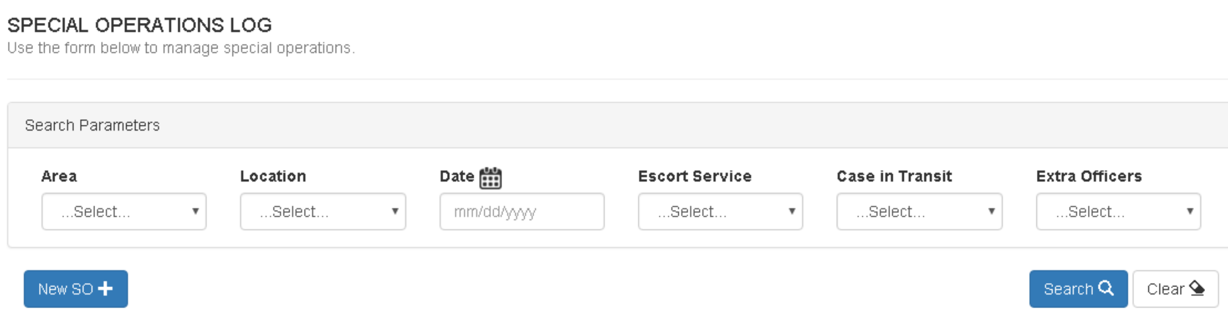
3. The report number is auto-generated.
4. Select the **Date**
5. Select **Shift**
6. Select **Area**
7. Select **Location**
8. Check the service that was done and enter the required value. These include:
    a. Escort Service
    b. Cast-in-transit in GT
    c. Cast-in-transit out GT
    d. Extra Officers

    If YES is checked for any of these services, a text box will be displayed for you to enter the quantity.

9. Enter **Comments**.
10. Click **Save** or **Save & Next** to complete.

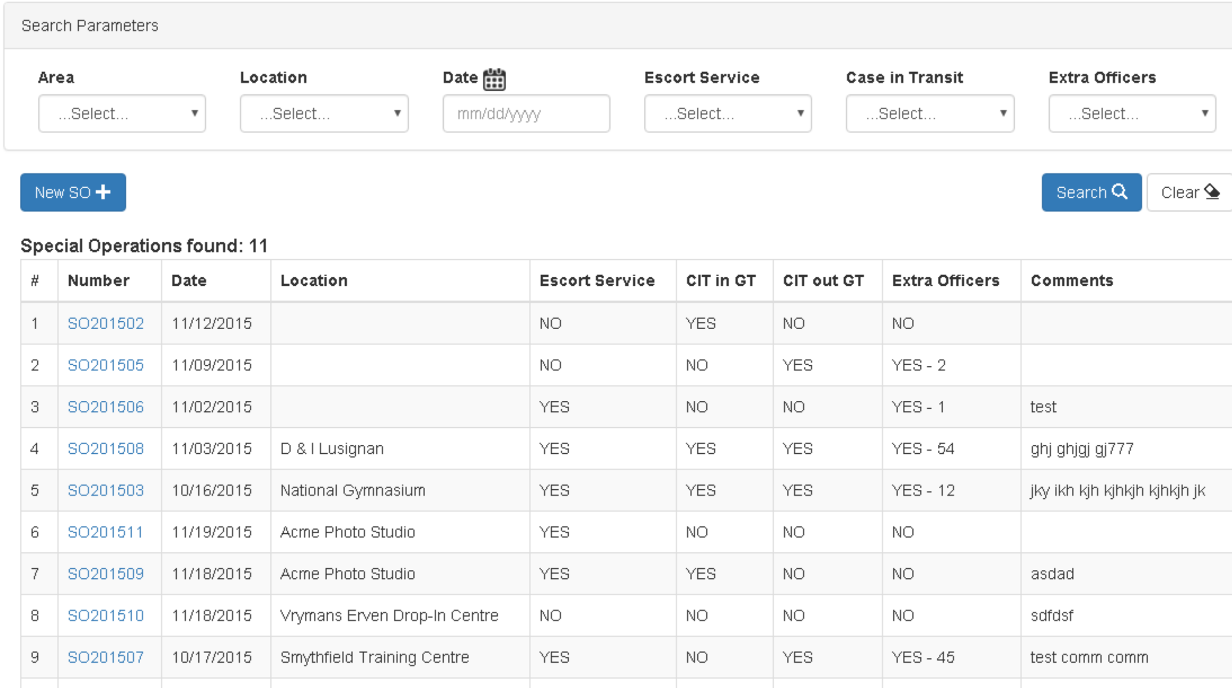
Search

1. Click **Managers -> Special Operations**



Special Operations search form

3. You can use either one, all, a combination of, or none of the following parameters to search for incidents:
    a. Area
    b. Location
    c. Date
    d. Escort Service
    e. Cash in Transit
    f. Extra Officers
4. Click on the Search button when completed and if any records are found, they will be displayed in a table. <u>NB: If no parameters are entered and the search button is click, all records will return.</u>



#	Number	Date	Location	Escort Service	CIT in GT	CIT out GT	Extra Officers	Comments
1	SO201502	11/12/2015		NO	YES	NO	NO	
2	SO201505	11/09/2015		NO	NO	YES	YES - 2	
3	SO201506	11/02/2015		YES	NO	NO	YES - 1	test
4	SO201508	11/03/2015	D & I Lusignan	YES	YES	YES	YES - 54	ghj ghjgj gj777
5	SO201503	10/16/2015	National Gymnasium	YES	YES	YES	YES - 12	jky ikh kjh kjhkjh kjhkjh jk
6	SO201511	11/19/2015	Acme Photo Studio	YES	NO	NO	NO	
7	SO201509	11/18/2015	Acme Photo Studio	YES	YES	NO	NO	asdad
8	SO201510	11/18/2015	Vrymans Erven Drop-In Centre	NO	NO	NO	NO	sdfdsf
9	SO201507	10/17/2015	Smythfield Training Centre	YES	NO	YES	YES - 45	test comm comm

Special Operations search results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on the **Number** to open.

Special Operations found: 11

#	Number	Date	Location	Escort Service	CIT in GT	CIT out GT	Extra Officers	Comments
1	SO201502	11/12/2015		NO	YES	NO	NO	
2	SO201505	11/09/2015		NO	NO	YES	YES - 2	
3	SO201506	11/02/2015		YES	NO	NO	YES - 1	test
4	SO201508	11/03/2015	D & I Lusignan	YES	YES	YES	YES - 54	ghj ghjgj gj777
5	SO201503	10/16/2015	National Gymnasium	YES	YES	YES	YES - 12	jky ikh kjh kjhkjh kjhkjh jk
6	SO201511	11/19/2015	Acme Photo Studio	YES	NO	NO	NO	
7	SO201509	11/18/2015	Acme Photo Studio	YES	YES	NO	NO	asdad
8	SO201510	11/18/2015	Vrymans Erven Drop-In Centre	NO	NO	NO	NO	sdfdsf
9	SO201507	10/17/2015	Smythfield Training Centre	YES	NO	YES	YES - 45	test comm comm
10	SO201504	10/16/2015		NO	NO	NO	YES - 255	
11	SO201501	10/15/2015	Black Bush	YES	YES	YES	YES - 34	

Opening a special operation record

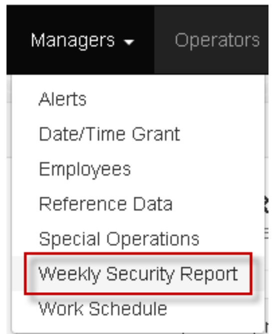
3. From the page displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

Weekly Security Report

Add New

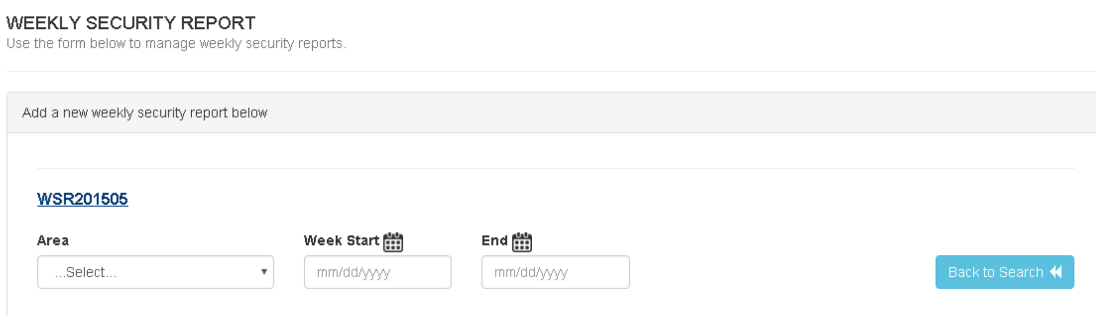
To add a new weekly security report, follow the below steps:

1. On the toolbar click **Managers -> Weekly Security Report**



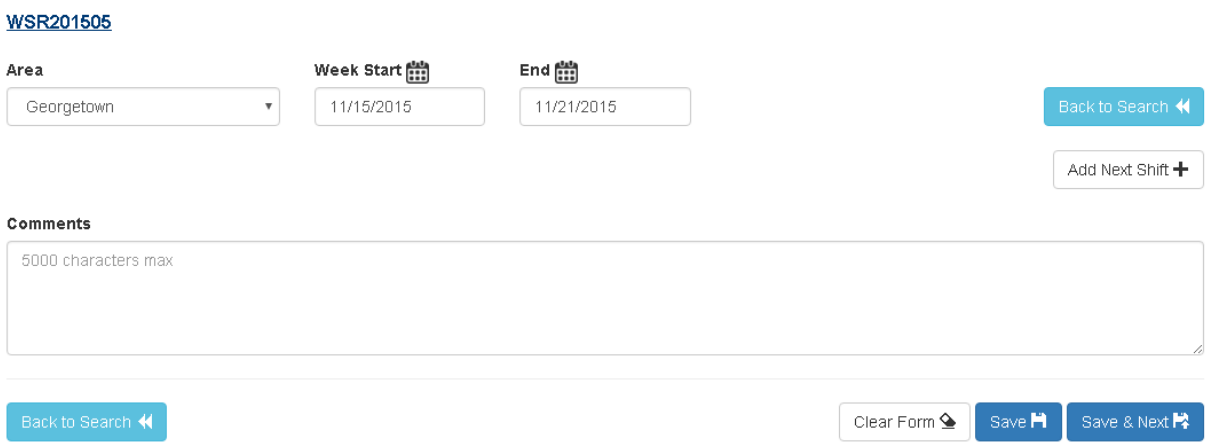
Accessing the Weekly Security Report page

2. On the page that is displayed, click on the **New Report** button.
3. The following page is displayed:



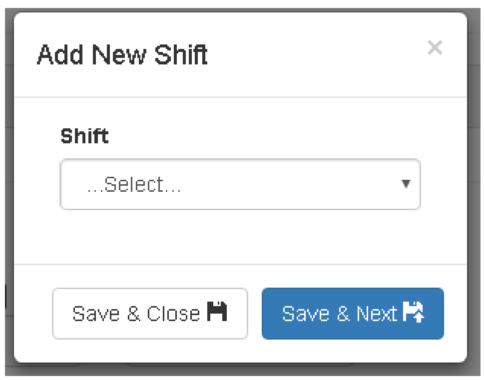
Weekly security report form

4. The report number is auto-generated.
5. You have to fill in the following for the form to be displayed:
    a. Area
    b. Week Start
    c. End
6. Once the above fields are completed, the following form is displayed:



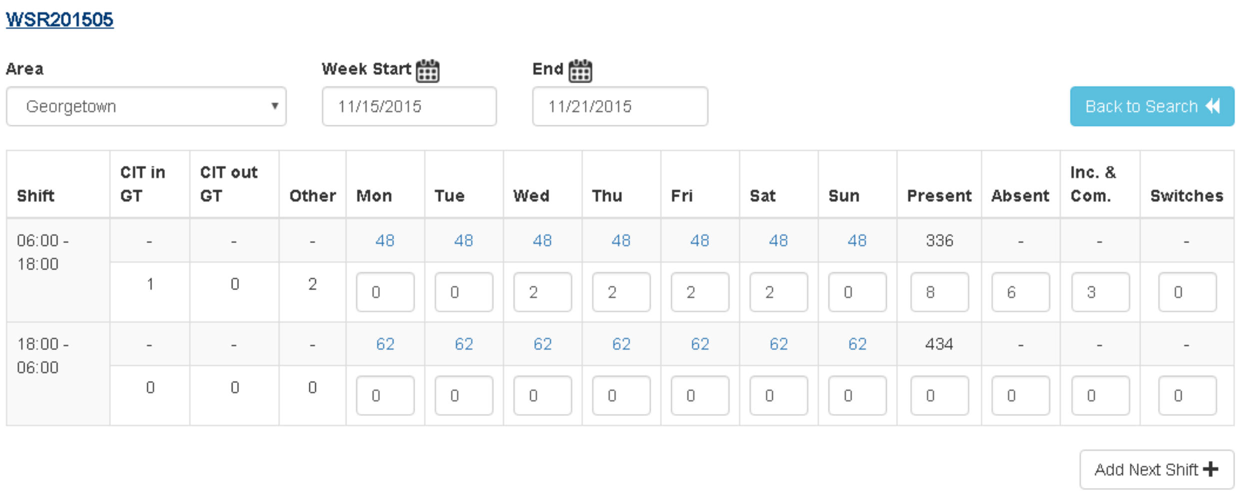
Weekly security report form

7. Add Shifts:
    a. Click on the **Add New Shift** button. The following window will be displayed:



Add new shift

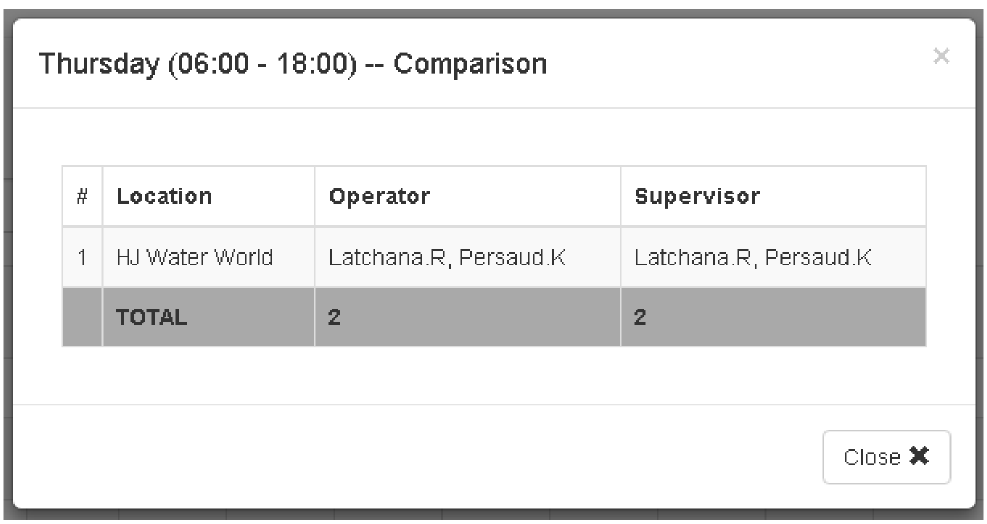
    b. Select the Shift.
    c. Click **Save & Close** to save the record and close the pop-up or click **Save & Next** to save the current record and add a next one.
    d. When Save and Close is clicked, the added record will be displayed as follows:



Shift	CIT in GT	CIT out GT	Other	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Present	Absent	Inc. & Com.	Switches
06:00 - 18:00	-	-	-	48	48	48	48	48	48	48	336	-	-	-
	1	0	2	0	0	2	2	2	2	0	8	6	3	0
18:00 - 06:00	-	-	-	62	62	62	62	62	62	62	434	-	-	-
	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Shift comparison

8. Clicking on the Numbers below the day of the week will show a popup with a comparison between the Operators and Supervisors. For example, clicking on the number under Thursday for the day shift shows:



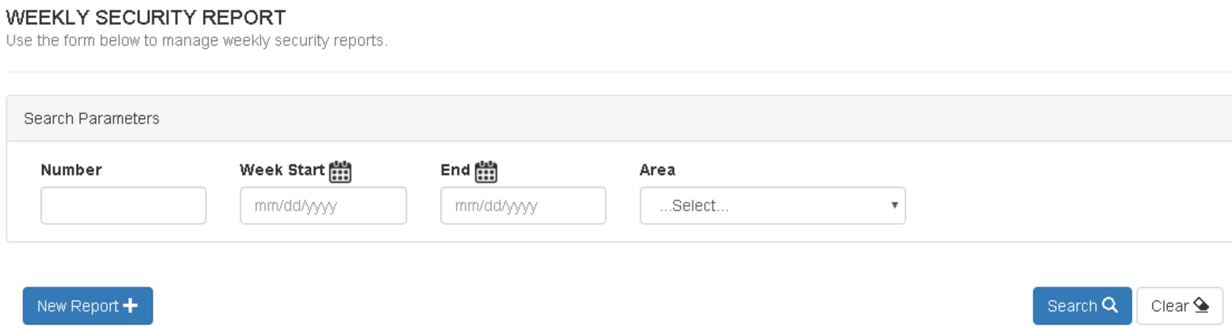
#	Location	Operator	Supervisor
1	HJ Water World	Latchana.R, Persaud.K	Latchana.R, Persaud.K
	TOTAL	2	2

Comparison details

9. Modify the quantities if necessary.
10. Enter Comments.
11. Click **Save** or **Save & Next** to complete.

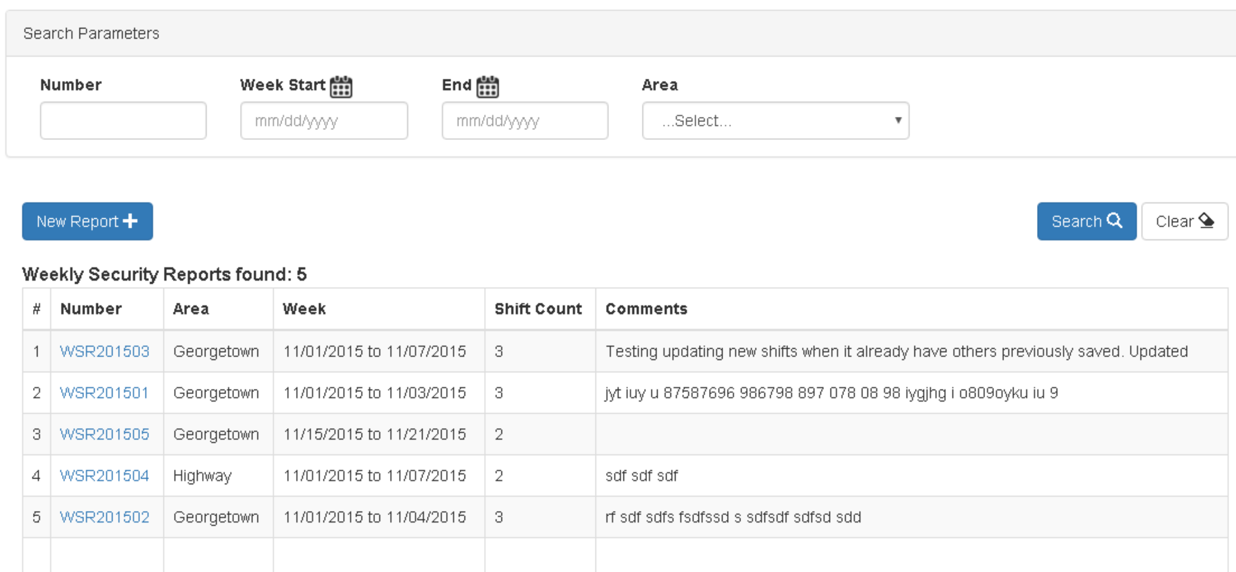
Search

1. On the toolbar click **Managers -> Weekly Security Report**



Weekly Security Report Search form

1. You can use either one, all, a combination of, or none of the following parameters to search for incidents:
    a. Number
    b. Week Start
    c. Week End
    d. Area
2. Click on the Search button when completed and if any records are found, they will be displayed in a table. <u>NB: If no parameters are entered and the search button is click, all records will return.</u>



#	Number	Area	Week	Shift Count	Comments
1	WSR201503	Georgetown	11/01/2015 to 11/07/2015	3	Testing updating new shifts when it already have others previously saved. Updated
2	WSR201501	Georgetown	11/01/2015 to 11/03/2015	3	jyt iuy u 87587696 986798 897 078 08 98 iygjhg i o809oyku iu 9
3	WSR201505	Georgetown	11/15/2015 to 11/21/2015	2	
4	WSR201504	Highway	11/01/2015 to 11/07/2015	2	sdf sdf sdf
5	WSR201502	Georgetown	11/01/2015 to 11/04/2015	3	rf sdf sdfs fsdfssd s sdfsdf sdfsd sdd

Weekly security report search results

Modify

1. Follow the steps outlined under **Search** above to find the record to modify.
2. Once the record if found, click on its **Number** to open.

Weekly Security Reports found: 5

#	Number	Area	Week	Shift Count	Comments
1	WSR201503	Georgetown	11/01/2015 to 11/07/2015	3	Testing updating new shifts when it already have others previously saved. Updated
2	WSR201501	Georgetown	11/01/2015 to 11/03/2015	3	jyt iuy u 87587696 986798 897 078 08 98 iygjhg i o809oyku iu 9
3	WSR201505	Georgetown	11/15/2015 to 11/21/2015	2	
4	WSR201504	Highway	11/01/2015 to 11/07/2015	2	sdf sdf sdf
5	WSR201502	Georgetown	11/01/2015 to 11/04/2015	3	rf sdf sdfs fsdfssd s sdfsdf sdfsd sdd

Opening a weekly security report record

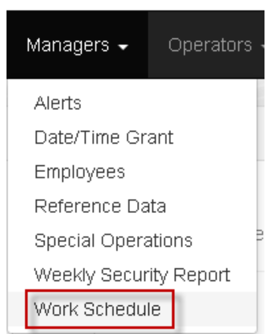
3. From the window displayed, make changes as need and then click on the **Save** or **Save & Next** button.
4. To return to the search page, click on the **Back To Search** button.

Work Schedule

Add New

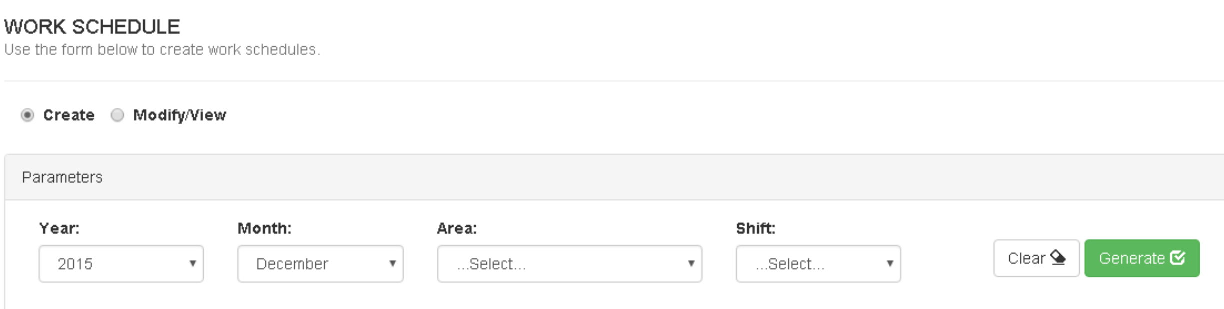
To add a new work schedule, follow the below steps:

1. On the toolbar click **Managers -> Work Schedule**



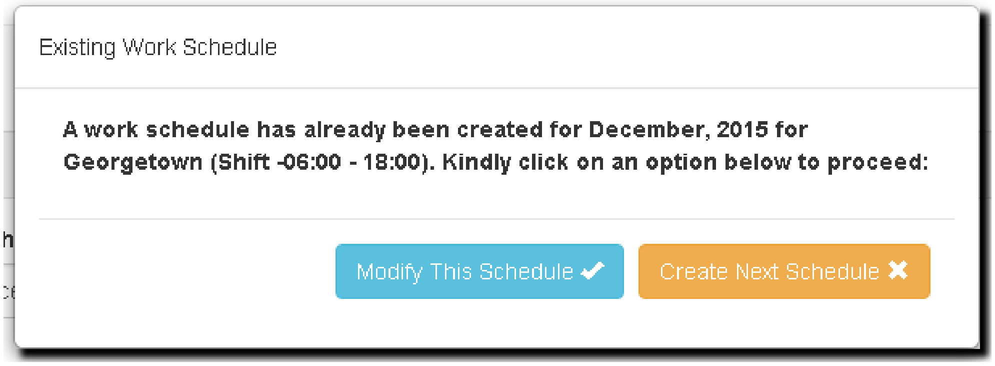
Accessing the Work Schedule page

2. The following page is displayed:



Work schedule form

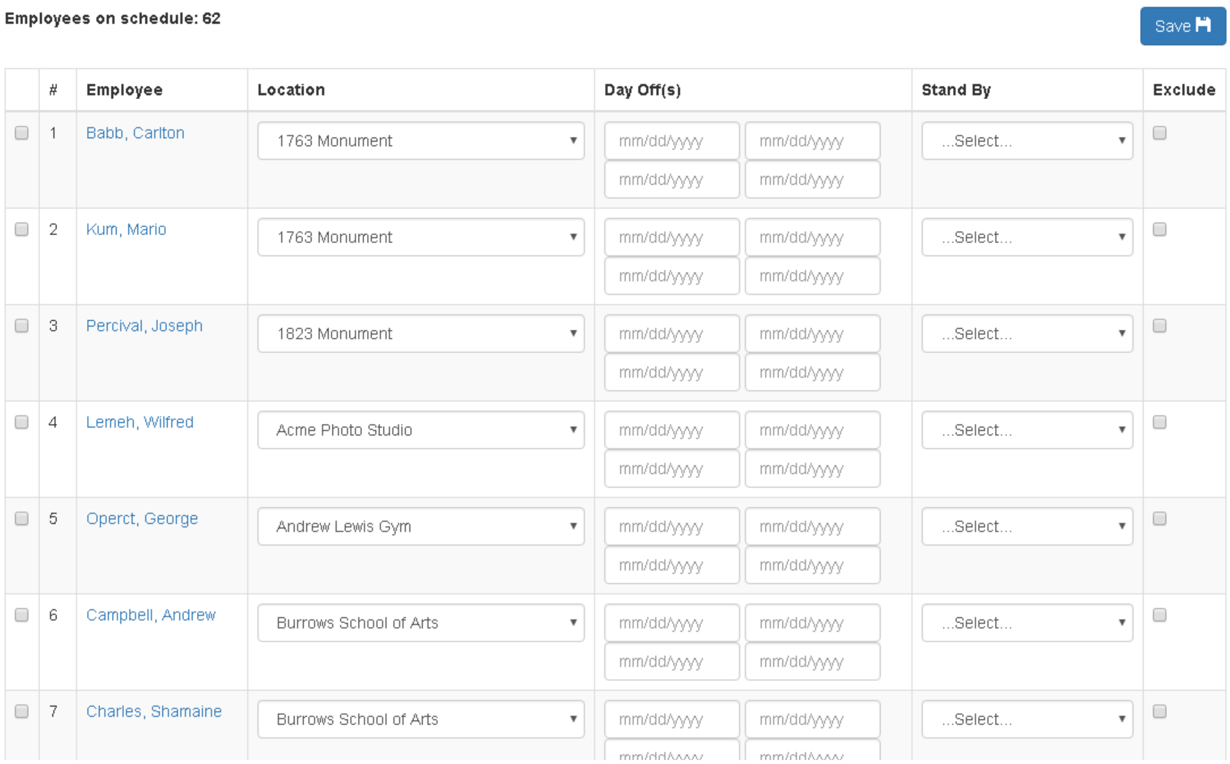
3. Select the **Year**. If the current month is November, the current year and next year will be displayed, other than that, only the current year is displayed.
4. Select the **Month**
5. Select the **Area**
6. Select the **Shift**
7. Click **Generate** button.
8. If the Work Schedule for the parameters selected exists, you will be presented with the following message:



Work schedule exists message

Click on the **Modify This Schedule** to modify the current schedule or click on **Create Next Schedule** to create a new schedule.

9. If the work schedule does not exist, the employees assigned to the selected Area and Shift who are active will be displayed:

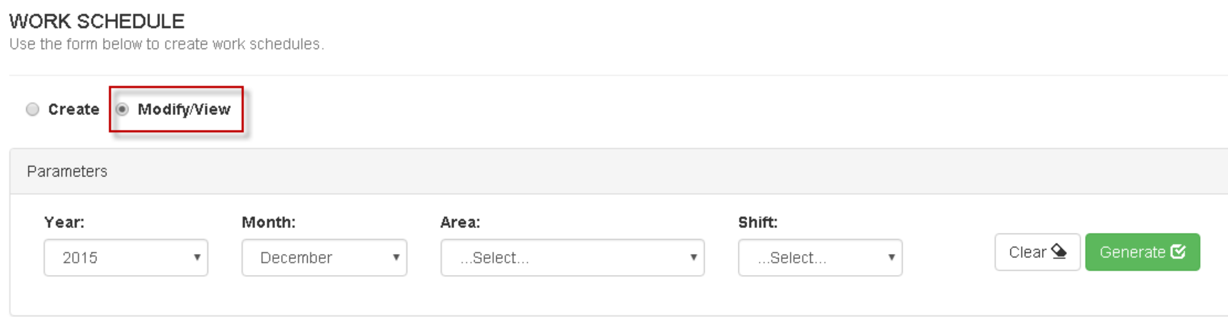


Employees assigned to Area, Shift

10. The first column is a checkbox that is used to mark the completion level. This is to allow you to know where to continue from if the list is saved to be completed later.
11. The second column is the **Employee**. Kindly see ***Employee Transfer*** section.
12. Next is the **Location**. This is the default location the employee is assigned to. This can be changed to any location within the Area selected.
13. Next is the **Day Off dates**. Here you can specify up to four (4) dates the employee will have as their day off.
14. Next you can select the **Stand By** person to work in place for the employee while they are on day off.
15. The last column is used to check the employee if they will be excluded from the schedule being created. That is, for example, if they are on leave and will not be working.
16. Click on the **Save** button when completed.

Modify

1. On the toolbar click **Managers -> Work Schedule**
2. Check the **Modify/View** radio button:



Modify/View radio button

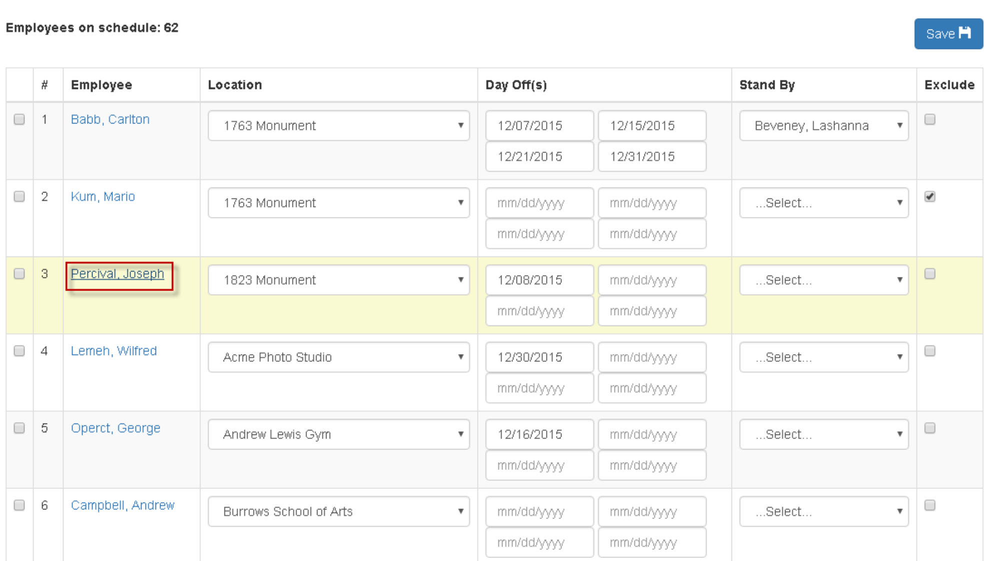
3. Fill in the parameters as required and click on the **Generate** button.
4. If the schedule does not exist, the following message will be displayed:

Schedule not created message

5. If it does exist, the employees will be loaded.
6. Make changes as needed and click the **Save** button.
   NB: Making a change that is before the current date will not be saved. For example, if you add a day off for an employee for December 1st and the current date is December 7th, that change will not be saved.

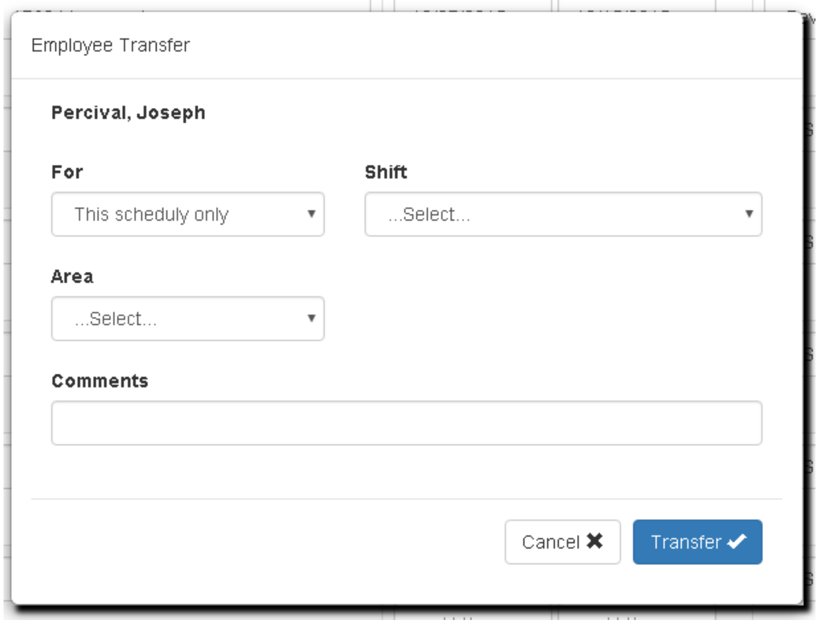
Transfer Employee

1. Follow the steps outlined under **Modify** above to find the schedule to modify.
2. Click the Employee's name to open the Employee Transfer window:



Selecting an employee to be transferred

3. The following screen is displayed:



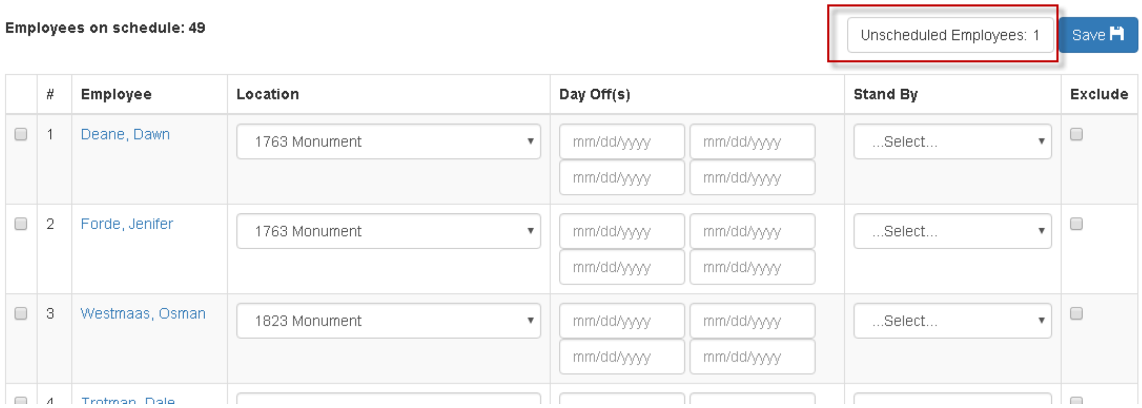
Employee Transfer window

4. Select the **For**. This specifies if the employee is transferred for this schedule only or for all subsequent schedules.
5. Select the **Shift** if the employee is being transferred to a different Shift.
6. Select the Area. After the Area, you have to select the Location. Only select the Area and Location if the employee will be moved to another Area/Location.
7. Enter **Comments**.
8. Click the **Transfer** button.

Schedule Unscheduled Employees

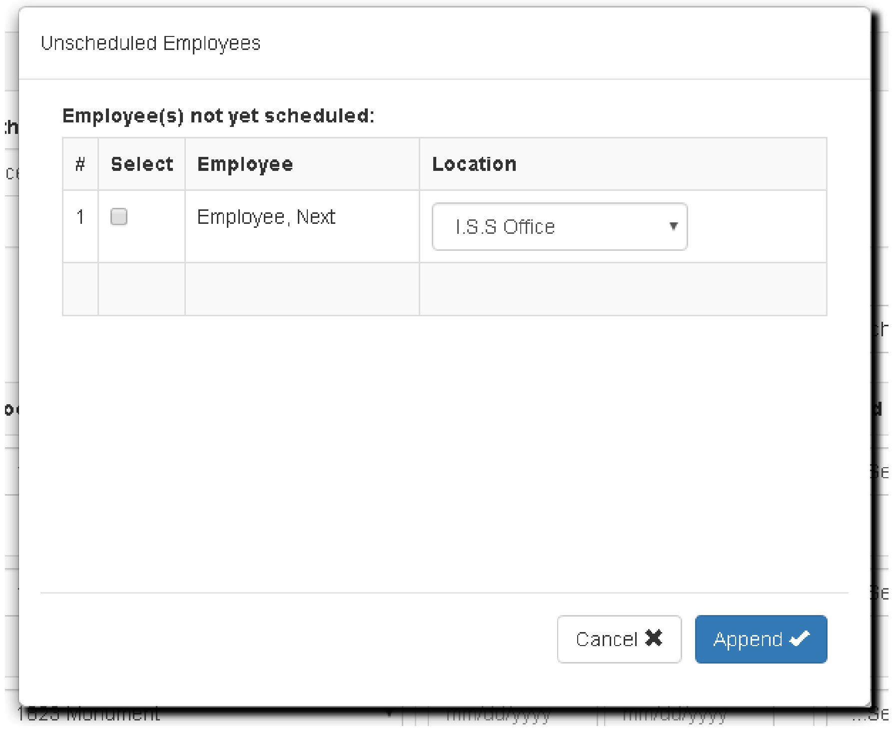
These are employees who have been created or activated after the Schedule would have been created. As such, they will not be listed on the schedule if not subsequently added.

1. Follow the steps outlined under **Modify** above to find the schedule to modify.
2. Once the list is loaded, any unscheduled employees will be displayed as a button:



Unscheduled employee button

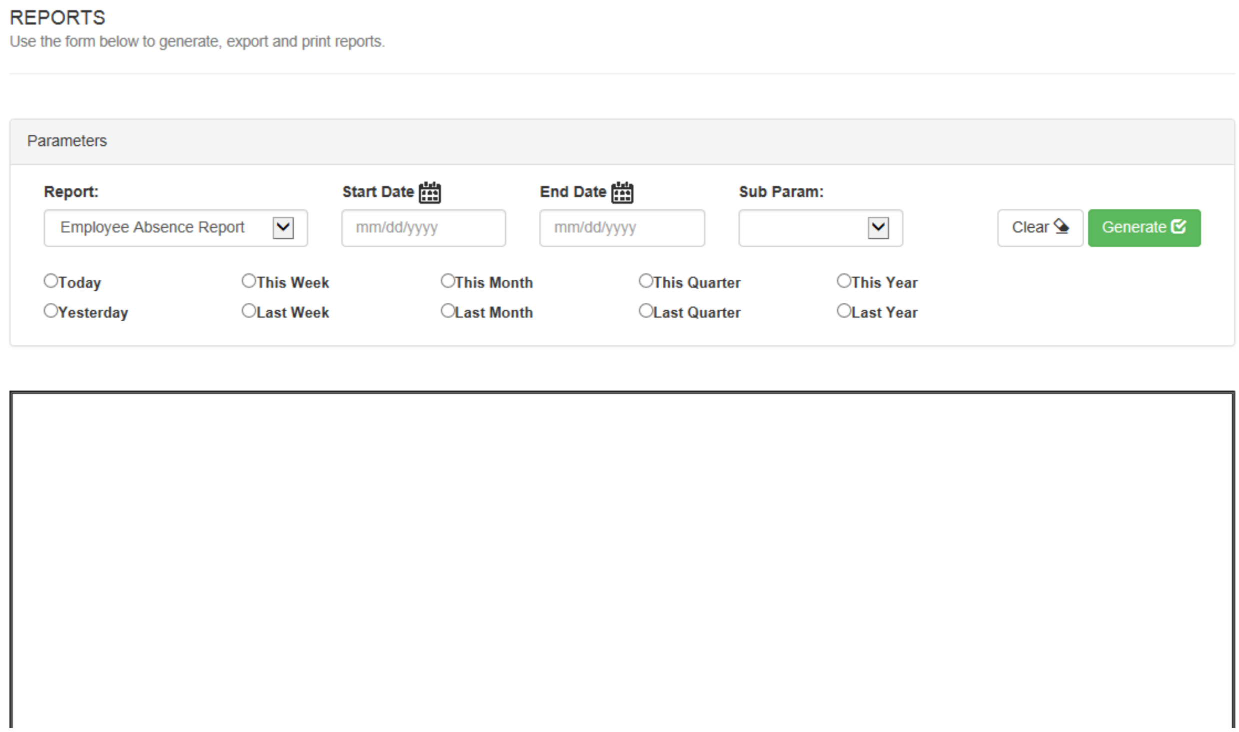
3. Click on the **Unscheduled Employees** button to view the employees.



Unscheduled employee view

4. Check the **Select** box.
5. Select the **Location**.
6. Click the **Append** button to save.

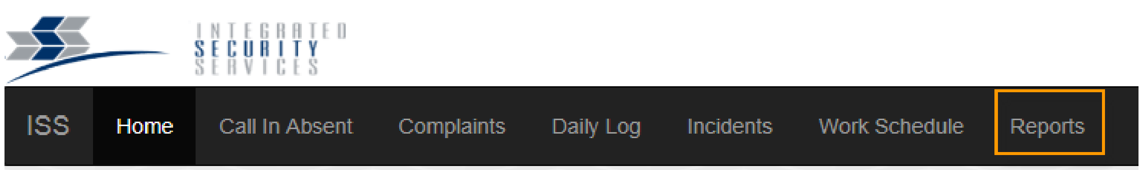
Reports



Reports page

To generate reports:

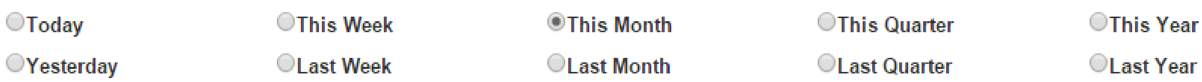
1. To access the page click on the **Repots** button on the toolbar.



Accessing the Reports page

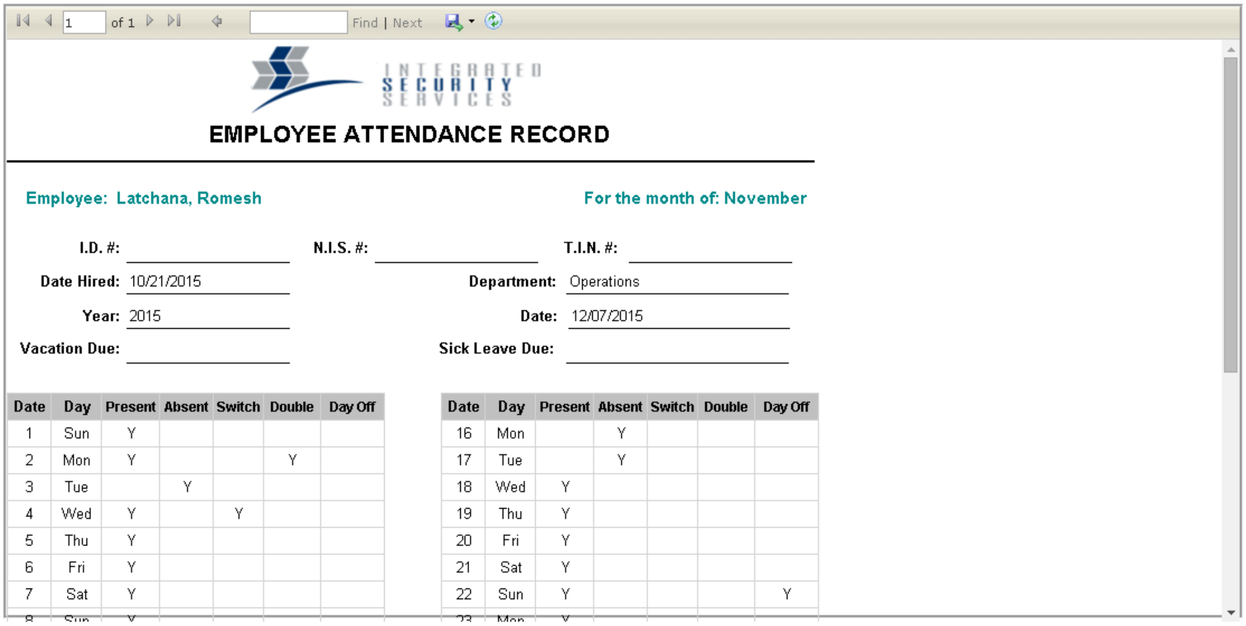
2. The individual roles have access to different reports. These are:
    a. Operator
        i. Employee Absence Report
        ii. Employee Attendance Record
    b. Compliance Officer
        i. Incident Report
        ii. Complaint Report
    c. Supervisor
        i. Shift Supervisor Report
        ii. Supervisor Shift Report

   d. Manager – has access to all of the reports outlined above as well as:
      i. Daily Operations Report
      ii. Manpower Allocation Report
      iii. Payroll Processing Report
      iv. Shortage Report – Daily
      v. Shortage Report – Summary
      vi. Weekly Security Report
3. To generate a report:
   a. Select the **Report**
   b. Specify the **start** and **end** dates. These are required and if not selected, the **Sub Param** list will not be populated. You can use the radio button option to auto-populate the date fields:



Date periods

   c. Select the sub parameter. The sub parameter is only optionally when it contains …Select… or is blank. Other than that, it contains:
      i. Complaints Report – lists all complaints created between the dates selected.
      ii. Employee Attendance Record – list of all employees
      iii. Incident Report– lists all incidents created between the dates selected.
      iv. Manpower allocation report – locations.
      v. Shift Supervisor Report – lists all daily post assignments created between the dates selected.
      vi. Supervisor Shift Report– lists all shift reports created between the dates selected.
      vii. Weekly Security Report– lists all weekly security reports created between the dates selected.
      viii. All other reports – a list of all the security shifts.
   d. Click the Generate button. The report will be displayed as below:



INTEGRATED SECURITY SERVICES

EMPLOYEE ATTENDANCE RECORD

Employee: Latchana, Romesh For the month of: November

I.D. #: N.I.S. #: T.I.N. #:

Date Hired: 10/21/2015 Department: Operations

Year: 2015 Date: 12/07/2015

Vacation Due: Sick Leave Due:

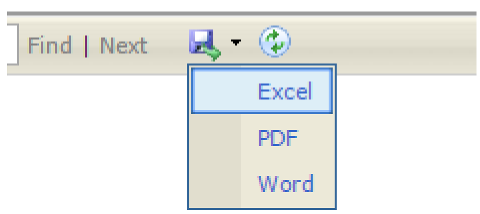
Date	Day	Present	Absent	Switch	Double	Day Off
1	Sun	Y				
2	Mon	Y			Y	
3	Tue		Y			
4	Wed	Y		Y		
5	Thu	Y				
6	Fri	Y				
7	Sat	Y				

Date	Day	Present	Absent	Switch	Double	Day Off
16	Mon		Y			
17	Tue		Y			
18	Wed	Y				
19	Thu	Y				
20	Fri	Y				
21	Sat	Y				
22	Sun	Y				Y

Report viewer

4. To save the report click on the Export button and select a format.

Report export button



Report Export Formats

5. To print, first export the report and then print. The best format to export reports that have either a Letter or Legal page size is PDF, other than that use EXCEL. This is because WORD cuts the header and footer of the reports.
6. Example of a report exported to PDF:

INTEGRATED SECURITY SERVICES

EMPLOYEE ATTENDANCE RECORD

Employee: Latchana, Romesh (15102102) For the month of: November

I.D. #: ______ N.I.S. #: ______ T.I.N. #: ______

Date Hired: 10/21/2015 Department: Operations

Year: 2015 Date: 12/11/2015

Vacation Due: ______ Sick Leave Due: ______

Date	Day	Present	Absent	Switch	Double	Day Off
1	Sun	Y				
2	Mon	Y			Y	
3	Tue		Y			
4	Wed	Y		Y		
5	Thu	Y				
6	Fri	Y				
7	Sat	Y				
8	Sun	Y				
9	Mon	Y				
10	Tue	Y				
11	Wed	Y				
12	Thu	Y				
13	Fri		Y			
14	Sat		Y			
15	Sun		Y			

Date	Day	Present	Absent	Switch	Double	Day Off
16	Mon		Y			
17	Tue		Y			
18	Wed	Y				
19	Thu	Y				
20	Fri	Y				
21	Sat	Y				
22	Sun	Y				Y
23	Mon	Y				
24	Tue					Y
25	Wed		Y			
26	Thu		Y			
27	Fri		Y			
28	Sat		Y			
29	Sun		Y			
30	Mon		Y			

Employee Signature ______ Date ______

Manager Signature ______ Date ______

Generated By: SATESH Page 1 of 1

Example of the Employee Attendance report