TRAINING

2025

PARAGON SYSTEMS

TRACKTIK

SCHEDULER

Table of Contents

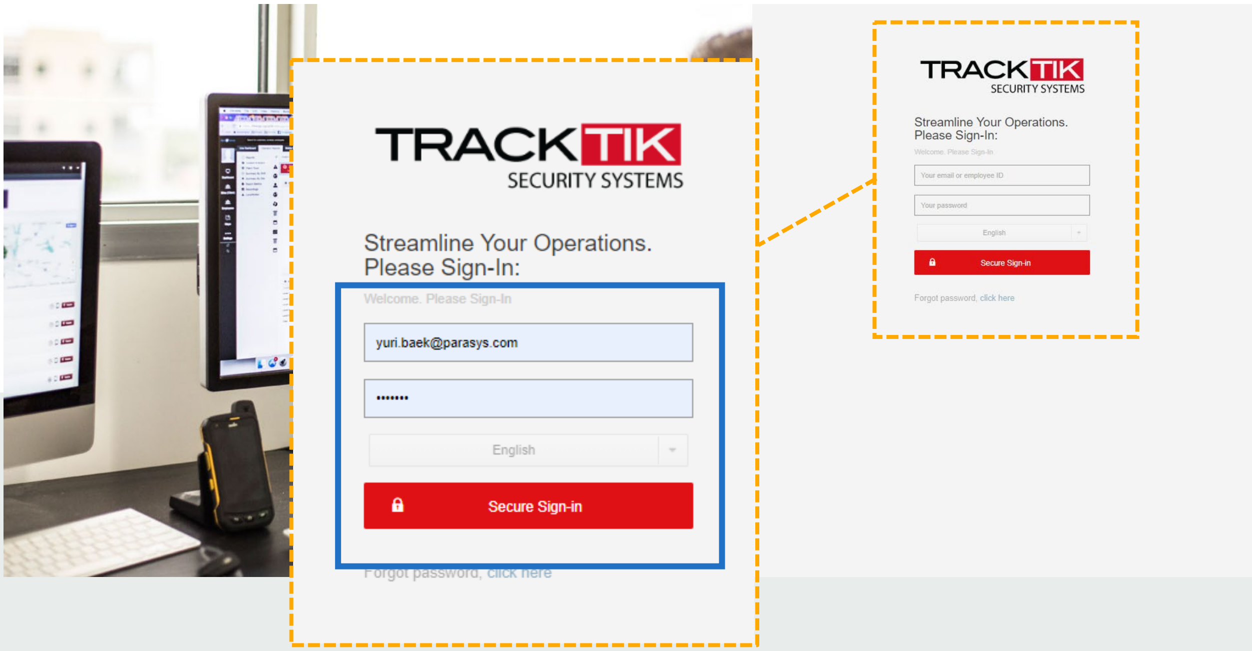
Overview

TrackTik is a robust software platform designed to help you manage guard duties, report incidents, and communicate with your team. Knowing how to log in to TrackTik is essential for accessing these features and performing your job effectively.

Accessing TrackTik

To access your portal, please enter the required information in the fields provided. You can find this information in your welcome email, which contains instructions on how to log in to your account.

Link: https://paragon.staffr.us/

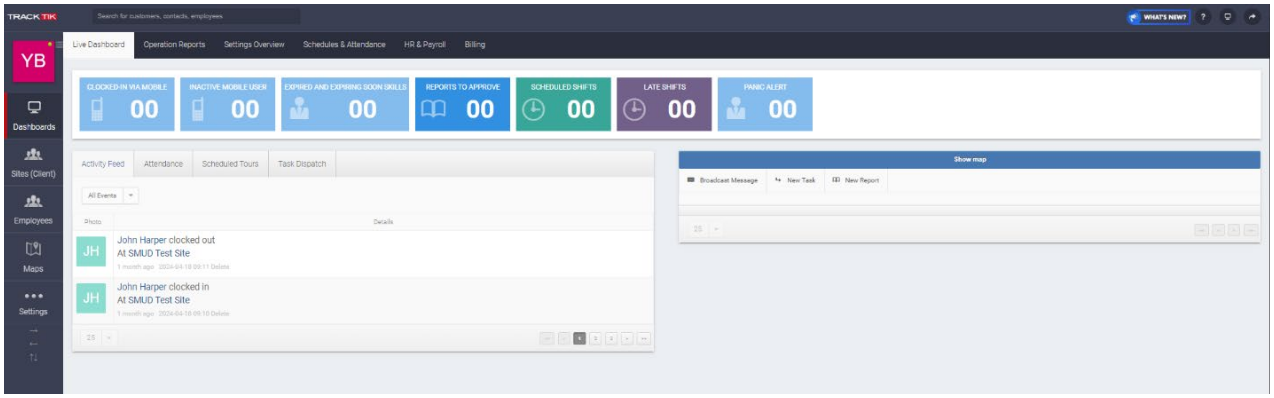


Use the following to sign into your TrackTik account:

Username: Email
Temporary Password: Track1$1

Dashboard: Introduction

The **Dashboard** comprises of multiple tabs enabling you to oversee operations and access field data, including tour details, field reports, intervention videos, and summary reports like Shift reports or DARs.

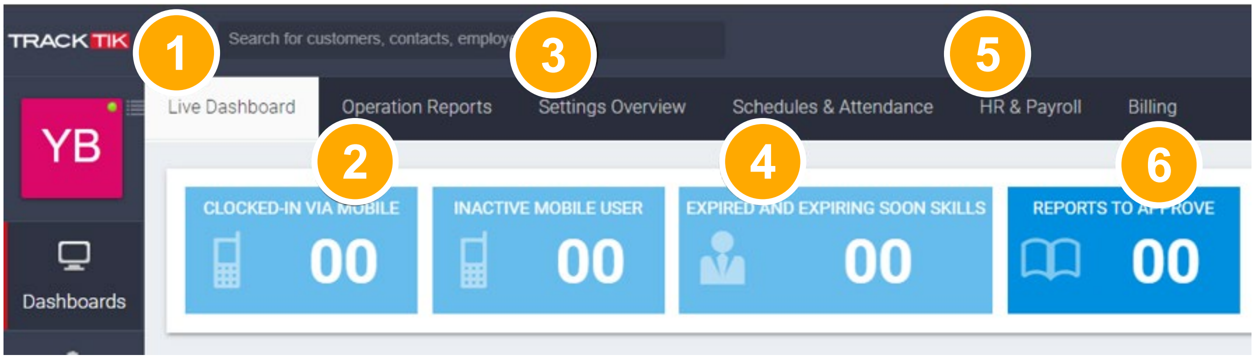


This section includes the following articles:

1. **Operation Tiles:** Provides real-time information on critical aspects of your field's operations.
2. **Operation Tools**: give insight into current activities across your portal, lets you track attendance in real-time, allows you to see scheduled tours across the domain and creates and manages simple dispatch tasks.
3. **GPS and Messaging Tools**: TrackTik' s GPS maps is on the live dashboard's right side. The map shows the real-time GPS locations of officers clocked into the system (**Not used**).
4. **Remote Options:** There are numerous remote options available from the live dashboard. Access these options by clicking on the cell phone icon next to the user (**Not used**).

Daily Activity Report (DAR)

The ***Shift Summary Report*** or ***Daily Activity Report,*** generated automatically by TrackTik, consolidates the tasks carried out by your employees or users throughout their shifts. This PDF encompasses employee-submitted reports, checkpoint scans, and Watch Mode Recordings**.**



1. **<u>Live Dashboard</u>**
   Gain immediate insights into your field operations, accessing vital data such as field reports, tours, and beyond in real-time.

2. **<u>Operation Reports</u>**
   This tab groups all your operational reports and tools across all sites and zones. It includes regular reports, patrol tours, journal entries, recordings, Shift and site summaries, report metrics, Incident analytics, post orders, and system exceptions.

3. **<u>Settings</u>**
   Allows you to activate features and establish system defaults, including configuring report templates, managing roles and permissions, and modifying incident categories.

4. **<u>Schedules & Attendance</u>**
   The Schedule is visible to guards after publishing. The Scheduler should only publish once all the changes have been made. Published shifts turn from grey to a solid bright color.

5. **<u>HR & Payroll</u>**
   Utilize TrackTik's HR & Payroll module to produce payroll-ready data derived from employees' shift records.

6. **<u>Billings</u>**
   Utilize the TrackTik Billing module to invoice clients for services provided. You have the flexibility to bill for patrols, dispatches, or the hours worked by guards on-site. Additionally, you can generate ad hoc invoices that aren't tied to any particular contract.

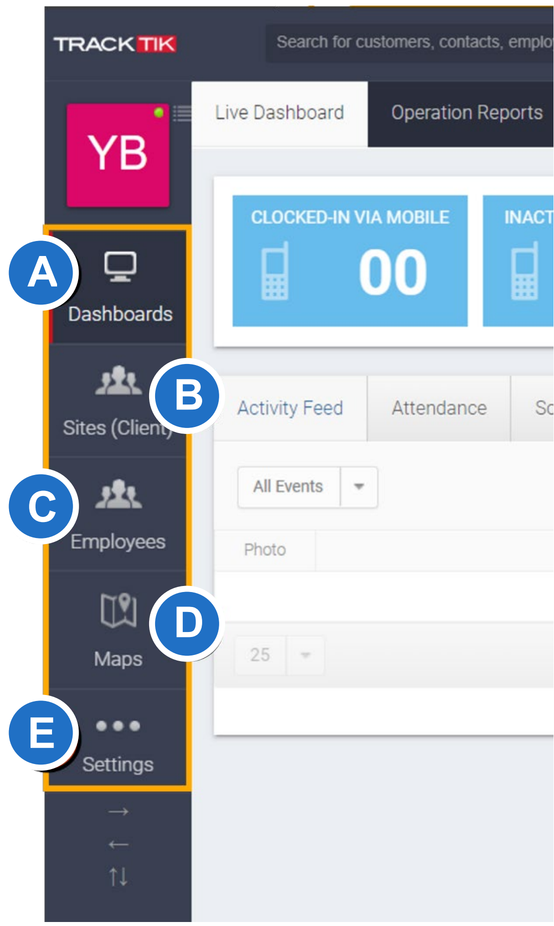
Dashboard Navigation

The navigation left on the left-hand side displays a standard set of functions with sub menus. Depending on your role and access level, these may vary. Additionally, some functionality is not active for our account.

The menus & submenus are listed below with what is currently active.
**Please note: You will only see those permitted for your role.*

A. Dashboard

1. Report Settings
2. Vehicle Management
3. Live Schedule
4. Journal – *Gives a history of terminated employees.*
5. System Exceptions
6. Attendance Dash



B. Sites (Clients)

1. Site List – *Gives list of sites.*
2. Site Zones

C. Employees

1. Department
2. Skills & Attributes
3. Expiring Attributes
4. Audit Log

D. Maps

1. Sites
2. Zone Mobile Users
3. Site Users
4. Geofencing

E. Settings

1. Patrol Settings
2. Devices & Licenses – *App licenses for Guard Tour app, not Shift app.*
3. Phone Time Keeping – *Configures IVR for call in clock-in and out.*
4. SLA Settings
5. Roles/Permissions – *Shows current roles/permissions. Customizes roles/permissions.*
6. Company Information – *Logos and company address for invoices. Users should avoid.*

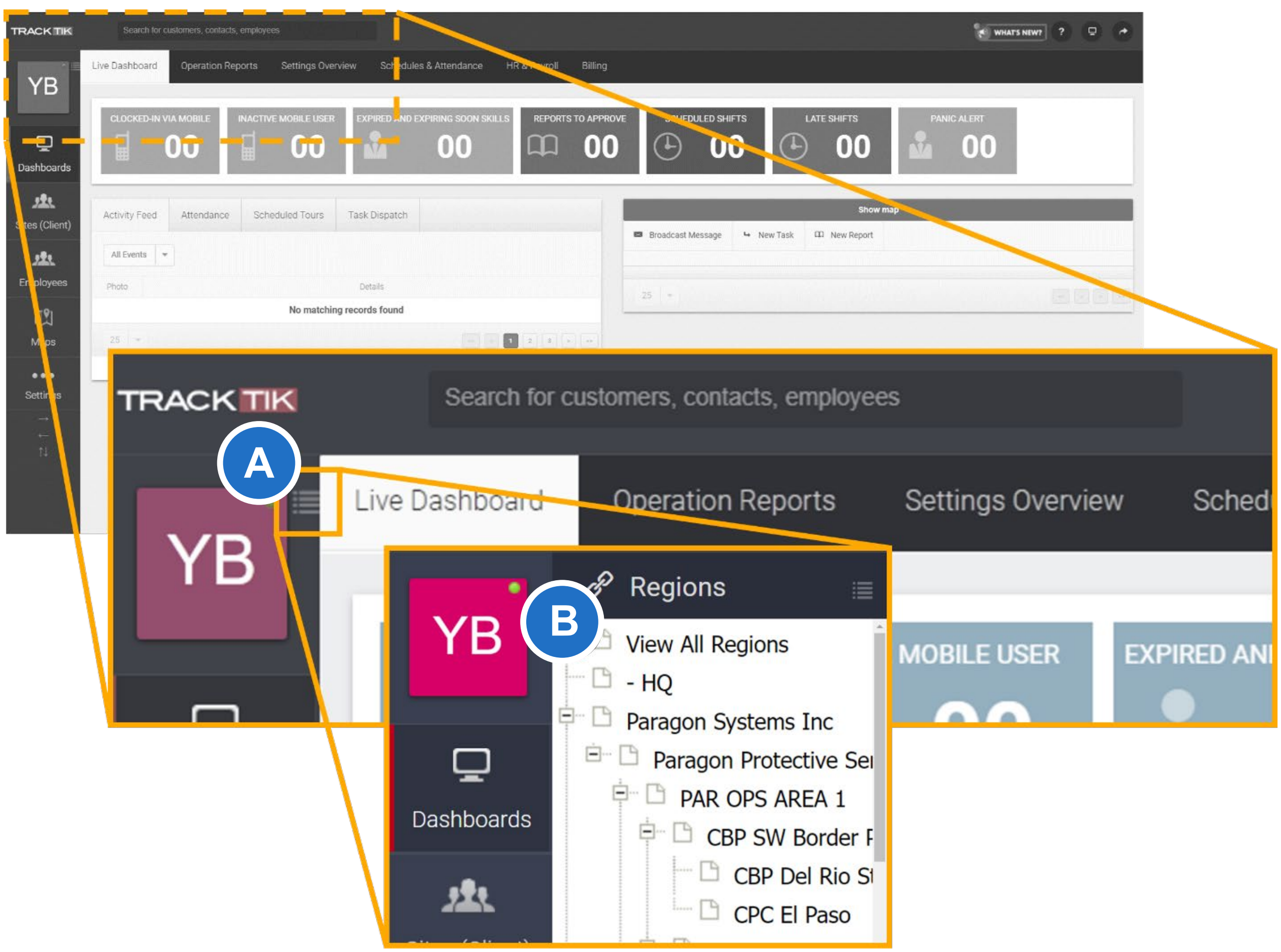
Regions Overview

Every region encompasses its own distinct array of configurations, including time zones and other settings specific to various TrackTik BackOffice modules. Additionally, each region may incorporate sub-regions, sites, zones, departments, and employees within its scope.

Based on your permissions, when viewing **All Regions**, you will be limited to viewing only the regions to which you are assigned.

To view regions:

On your **Dashboard**, locate the **three vertical lines**. This allows for an overview of all regions and contracts (based on permissions).



Assigned Sites

The **Assigned Sites** tab contains a list of sites to which the employee is assigned. You can also add or delete a site assignment from here.

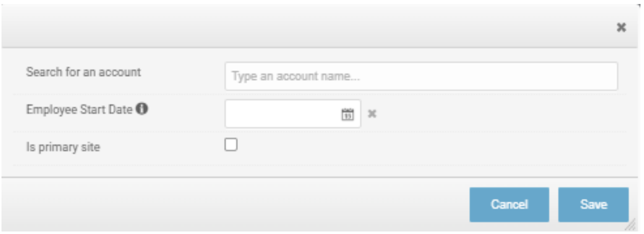
Location: Employees > Select Employee > Assigned Sites

Columns (Left to Right)

1. **Site:** The name of the site to which the employee is assigned.
2. **Start Date:** The first date the employee was assigned to work at the site.
3. **Effective Rate Date:** The effective date of the assignment. If effective immediately, the field will show "initial."
4. **End:** End date of the assignment.
5. **Is Primary:** This shows whether this is the primary site assignment for the employee.
6. **Make Primary:** Clicking here will make this the primary site assignment for the employee.
7. **Remove:** Clicking here will remove the assignment.

To assign the employee to a new site:

1. Click the "***Assign to Site button***."
2. **Search for Account**: Begin typing the name of the site you would like to assign to the employee.
3. **Start Date**: The effective date of the site assignment.



4. **Is primary site**: Check this box if this is the primary site assignment for the employee.
5. Click the "***Save***" button to finalize the site assignment.

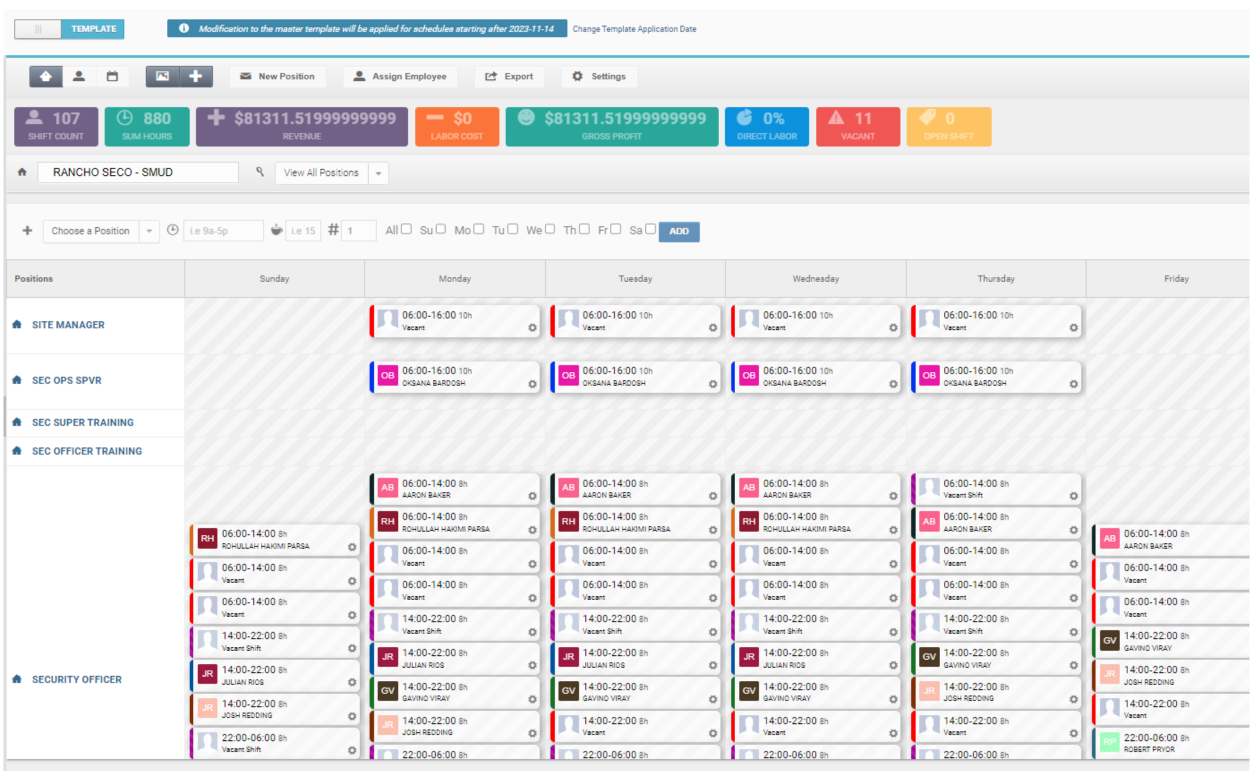
The start date will auto-generate! If they can't be scheduled on the same day as the start date, please adjust it to be earlier than their first scheduled day.

Schedules VS. Templates

Template

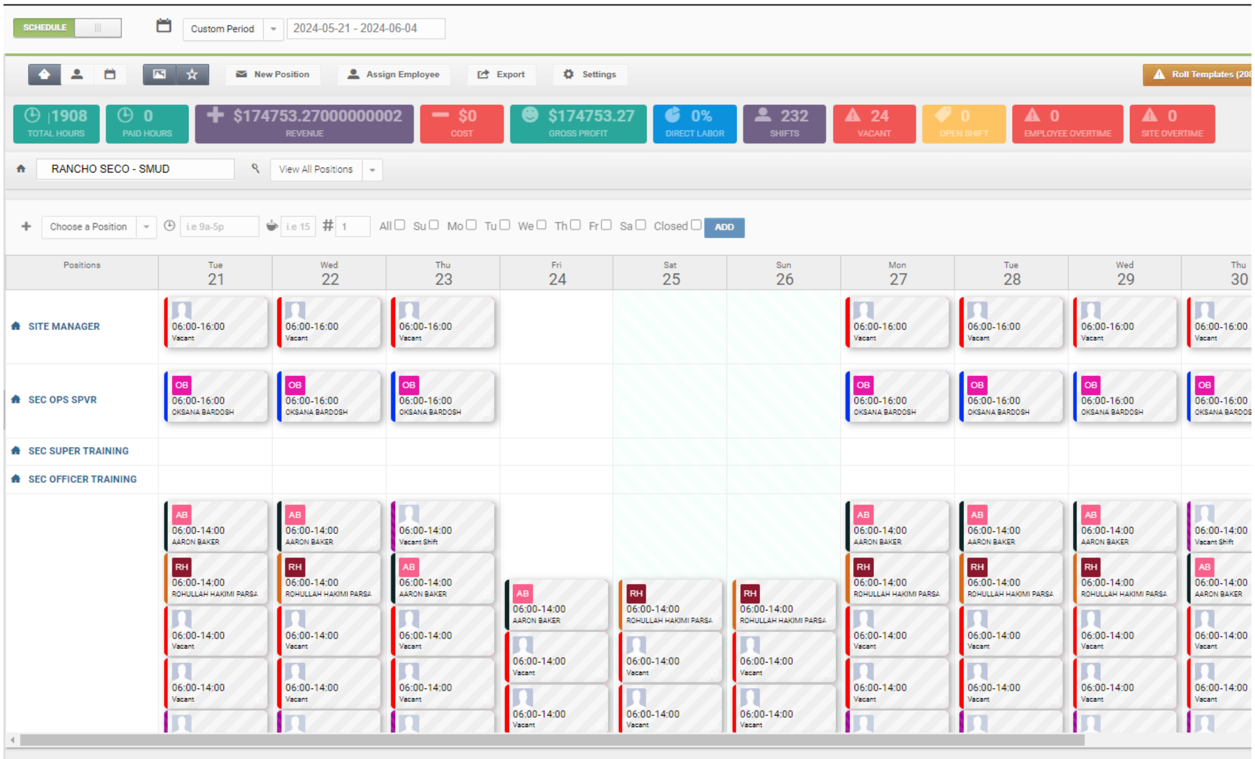
You can configure the template to follow a **recurring schedule** by site, zone, or department, allowing admins to create customized templates based on each site's requirements.

For example, some locations might use a weekly recurring schedule, while others may define the recurrence period by weeks or days. **Schedule templates efficiently automate recurring or known shifts week after week.** Schedulers will use the rolling schedule to prepare weekly schedules that will be applied consistently until the end of the service period. Once the schedule is prepared for a period, it can be published, moving those shifts to the master schedule.



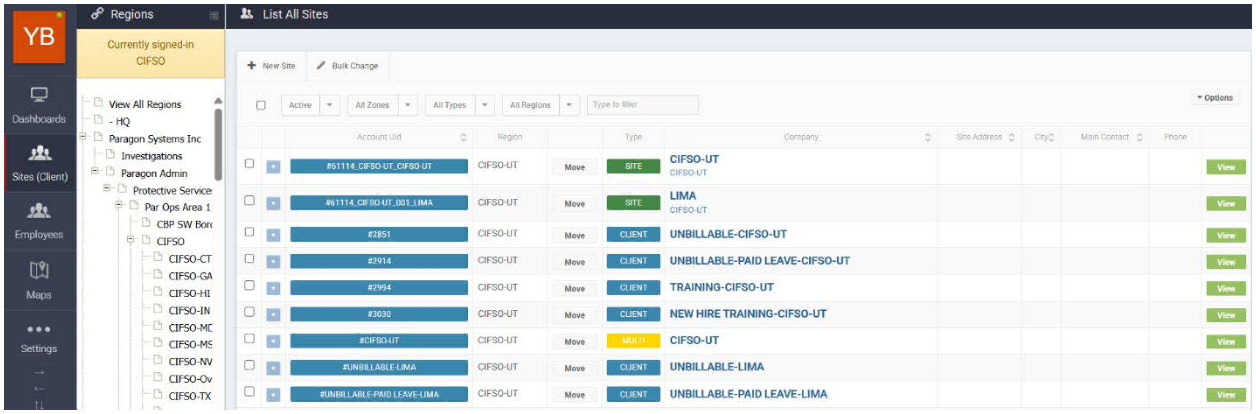
Schedule

The schedule includes all shifts that have been published from the template, representing the final version for all sites. Typically, the schedule is only edited for exceptions, such as when an employee needs a replacement. Using the Quick Shift Tool feature, you can batch edit multiple exceptions efficiently.

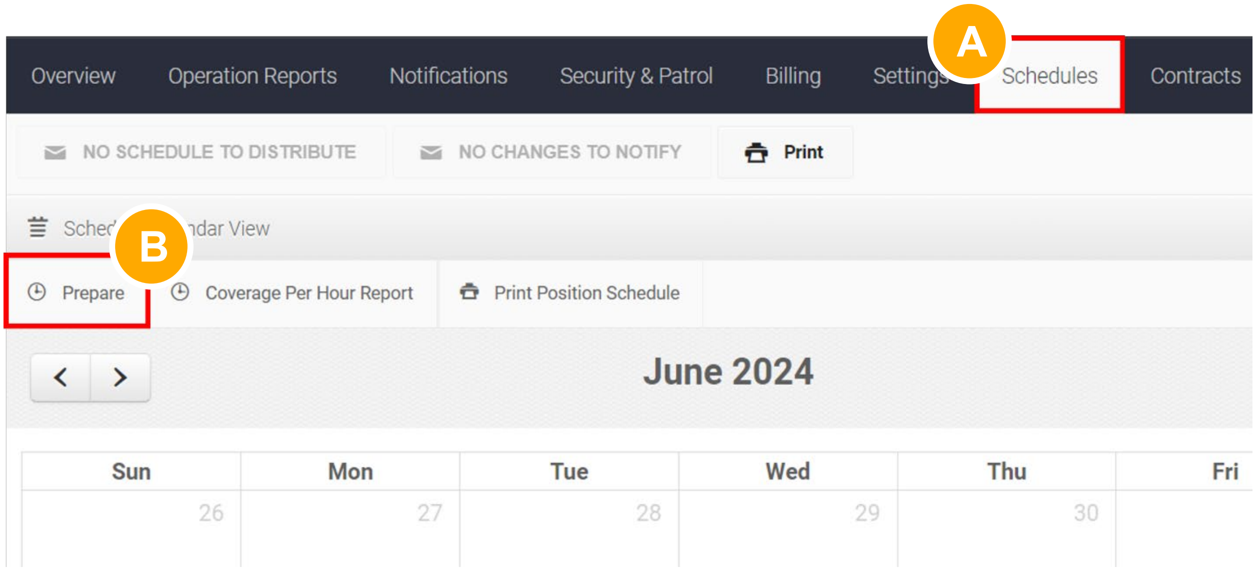


How to Schedule

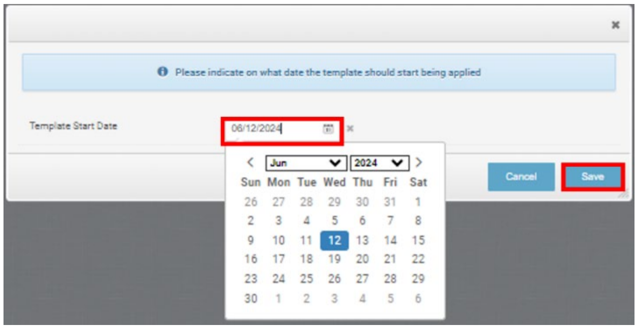
From your Dashboard, navigate to “Sites” on the left-hand menu. Search for your site and open the portal.



Go to “**Schedules**” tab and click “**Prepare**.”



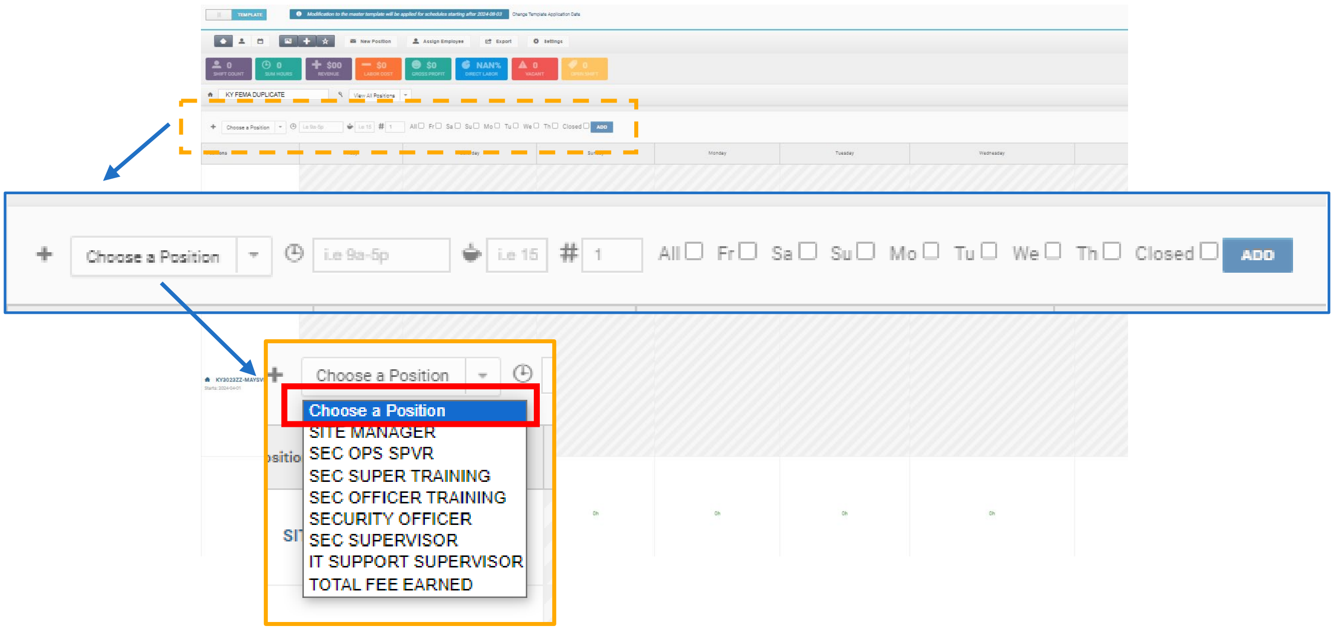
Select the start date for the template.



Creating a Template

Make sure that you have it toggled to “**Template**” to ensure that you are making changes to the proper mode.

From there, select the “**Position**” in which the schedule is being created for.

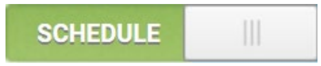


Fill out the rest of the required information:

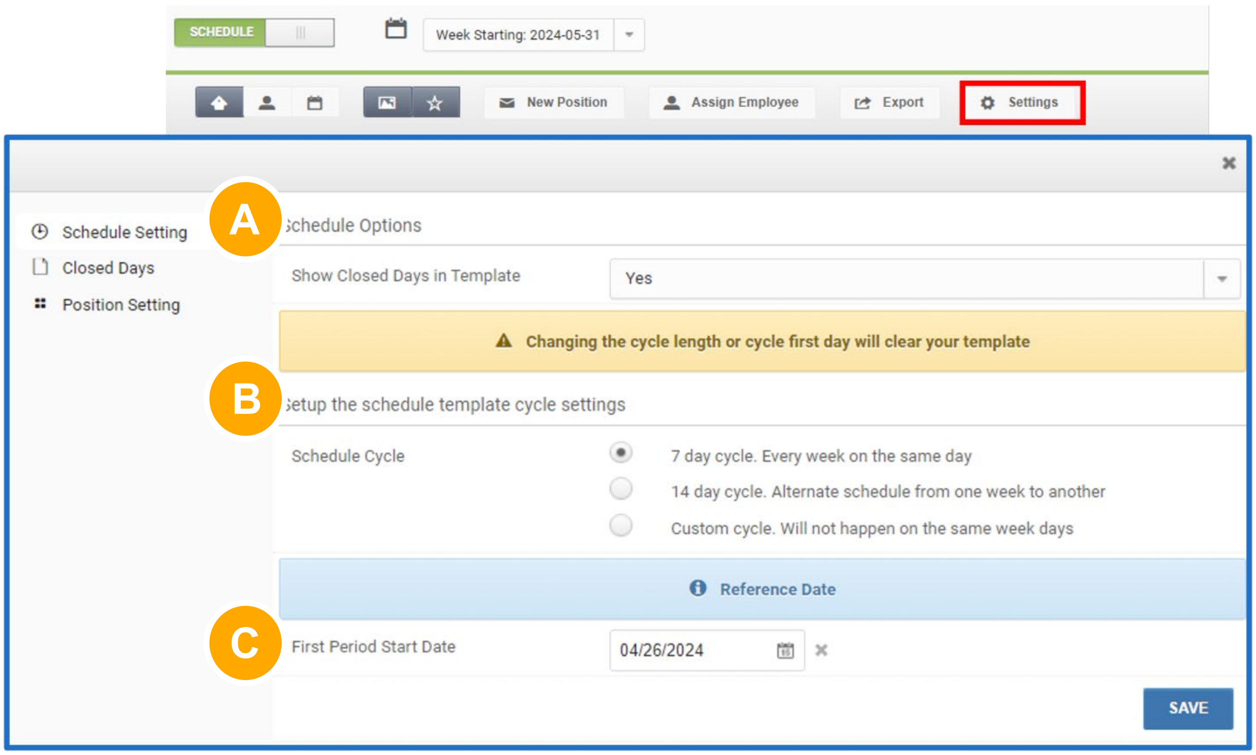
- Create Recurring Shifts
- Choose a Position: Select Position
- Time: Scheduled Hours i.e. 9 am - 5 pm
- Rest or Meal Break
- #: how many guards will be working at the same time
- Select the days that apply to this shift

Once “**Add**” has been clicked on, the schedule will sync and appear on the schedule view.

Creating a Schedule

Switch the toggle to "**Schedule**." 

Then, click "**Settings**."



A. Schedule Options:

- **Show Closed Days in Template**: Yes or No
- **Enable Open Shifts:** Yes or No
    - (**Open Shifts**: Vacant Shifts for PSOs to pick up.)

B. Setup the schedule template cycle settings:

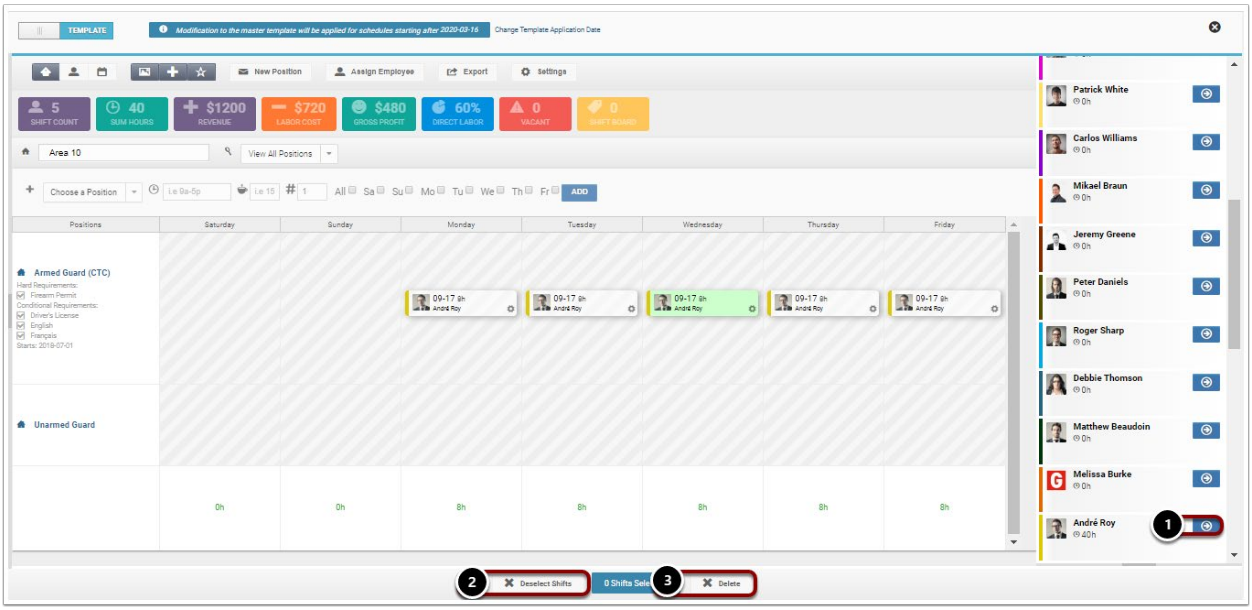
- **7-day cycle:** Every week on the same day.
- **14-day cycle:** Alternate schedule from one week to another.
- **Custom cycle**: Will not happen on the same weekdays.

C. First Period Start Date: First day of cycle

Assigning an Employee to Shift

You can select multiple shifts by clicking and holding the left mouse button while dragging the cursor to select an area on the screen. All the shifts included in the selected area will then be selected to be modified.

1. **Assign a Guard:** With a shift(s) highlighted, click on the blue arrow button in the employee's tile to assign the employee to the selected shifts.
2. **Deselect Shifts:** Release the selected shifts without editing them.
3. **Delete:** Delete shifts in bulk by clicking the Delete button at the bottom of the screen.



Continue creating shifts and assigning guards until the template is complete. Shifts scheduled in the Template view will automatically populate in the Schedule. If an employee does not regularly cover a specific shift, leave it vacant in the template so it can be assigned later in the schedule.

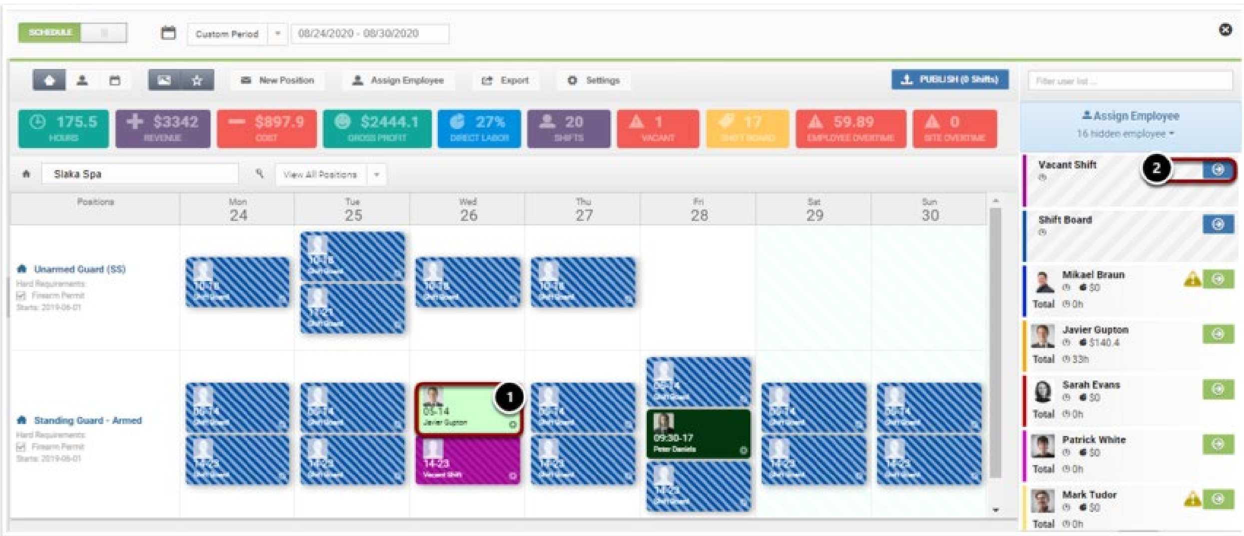
If you can’t locate the employee on the right-hand side, proceed to assign the employee to the site first. You can also press “Assign Employee” at the top.

Unassign an Employee from a Shift

At any time, you can unassign an employee from a shift by setting the shift to vacant, assigning a different employee to the shift, or posting the shift to the shift board.

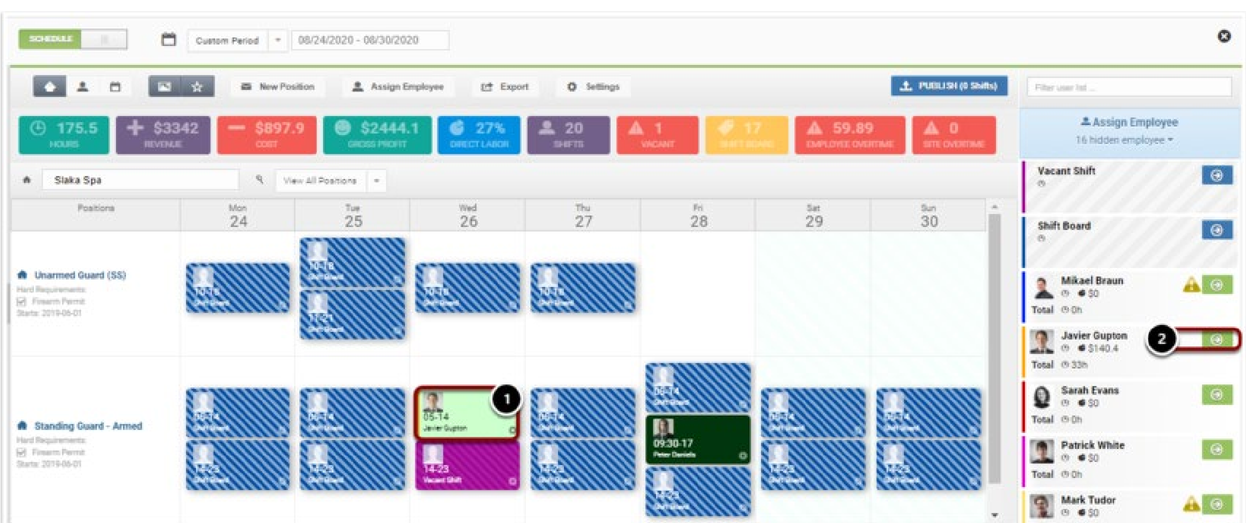
Set The Shift to Vacant

1. Click on the shift.
2. Select the Vacant Shift option



Assign A Different Guard

1. Click on the shift.
2. Select the employee you would like to assign.



Creating Ad hoc (one time) or Non-Recurrent Shifts

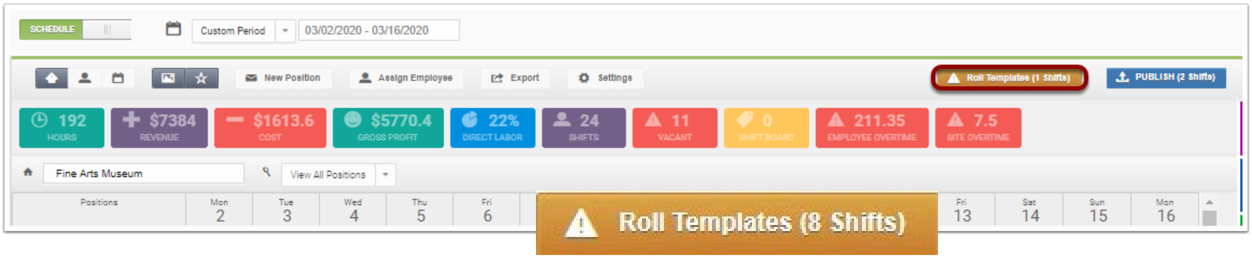
One-time shifts must be created in the **Schedule** view to ensure they do not repeat weekly.

Steps to Create a One-Time Shift:

1. In the schedule grid, hover over the bottom of the desired post/position and day. *Note: A light blue "+" button will appear.*
2. Click the "+" button.
3. Enter the shift details.
4. Click **Create** to finalize the shift.

Roll the Template

To better manage many shifts, an option will apply the template to the site with up-to-date information without making it public. This will help you finalize your schedule.



This option is called "Rolling the Template" and will help you validate the schedule for:

1. **Potential Conflict: If** there is a schedule conflict for an employee in part of your template, the shift will become vacant, and a yellow triangle of warning will appear. Hovering over that triangle will let you know why this shift became vacant.
2. **Overtime:** If applicable, a red square displaying the amount of OT (Over-Time) hours for the shift will appear for each employee part of your template.
3. **Time-Off:** If time off requests have been submitted by employees that are part of your template, just like a schedule conflict, the shift will become vacant with a yellow warning triangle.

Note: The Roll Templates button will only appear if Template validation is required before publishing. That will allow the Scheduler to plan for every adjustment before publishing. Publishing makes the schedule available to employees.

Publish the Schedule

The schedule is visible to guards after publishing.

Before publishing your schedule, the following will need to be done to ensure that information has been inputted accurately:

1. ***Review*** *the information that you have newly added/updated.*
2. ***Roll*** *the schedule to identify any errors/warnings. All identified errors/warnings should be resolved prior to publishing.*

Published shifts change from **grey** to a **solid bright color**.

Where Published Shifts Are Accessible:

- **TrackTik Mobile Application**
- **Employee Portal**
- **Distribution Email** sent to affected employees
- **IVR System** (by texting "Schedule")

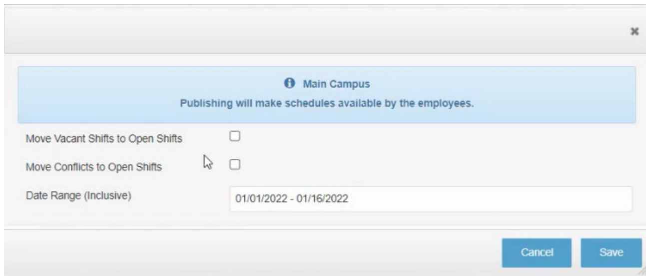
Note: Employees using the **Interactive Voice Response (IVR)** system or **Bring Your Own Device (BYOD) cannot** clock into published shifts.

Steps to Publish the Schedule:

1. **Confirm the Date Range**
   - The selected date range determines which shifts will be published.
   - This information will also appear in the pop-up window.

2. **Click the "Publish" Button** 

    - Complete the required fields in the pop-up window.
3. **Click "Save"**
    - Once publishing is complete, the **number of shifts in the "Publish" button should be updated to zero**, confirming all shifts have been published.



    - After completing this action, the number of shifts shown in the Publish button should change to **zero**, indicating that all shifts shown have been published.

Distribute the Schedule

You can distribute email schedules that you have published. This email will include the name and the address of the site/client, the position, and the schedule memo at the position level, if applicable.

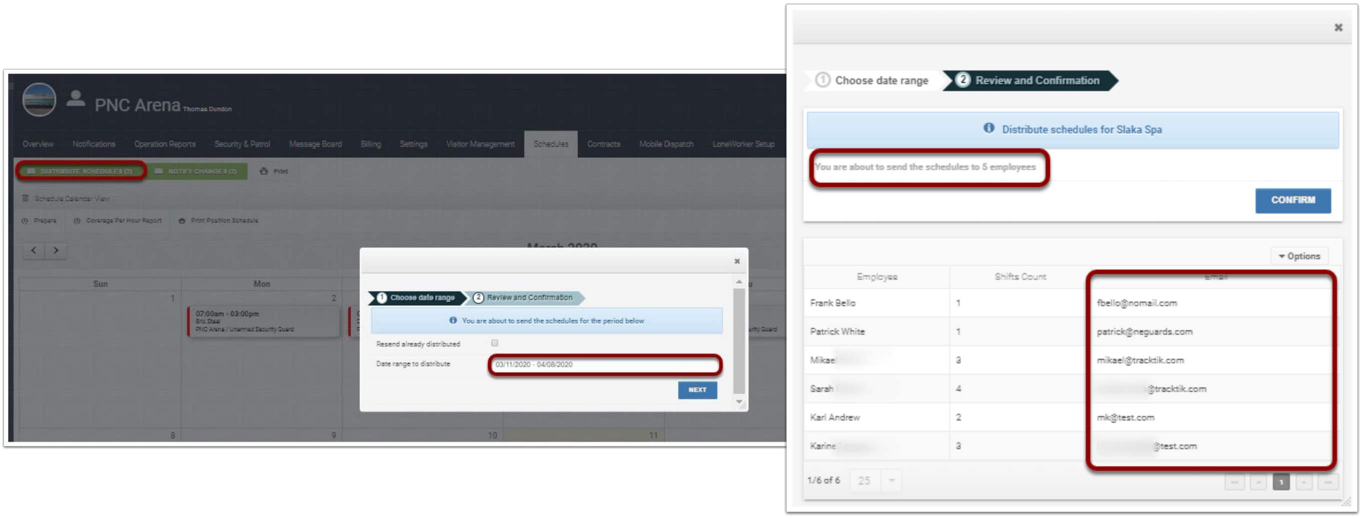
TrackTik will alert you if the employee needs an email address in their profile.

You can distribute a schedule from the following locations:

1. **From the Main Menu:**
    - **Dashboard** > **Schedules & Attendance** > **Schedule Preparation**
2. **From a Specific Site:**
    - **Sites (Clients)** > **Select Site** > **Schedules**

Steps to Distribute the Schedule:

1. Click the **Distribute Schedule** button.
2. Validate the **date range** to be published.
3. Review the **number of schedules** and **security guards** who will receive it.
4. Click **Next** to proceed.



Guards will receive an email with the list of shifts that they have been scheduled for. An acknowledge button will appear if you said yes to requesting employee acknowledgment.

For those using the SHIFT App, they will receive a notification through the application.

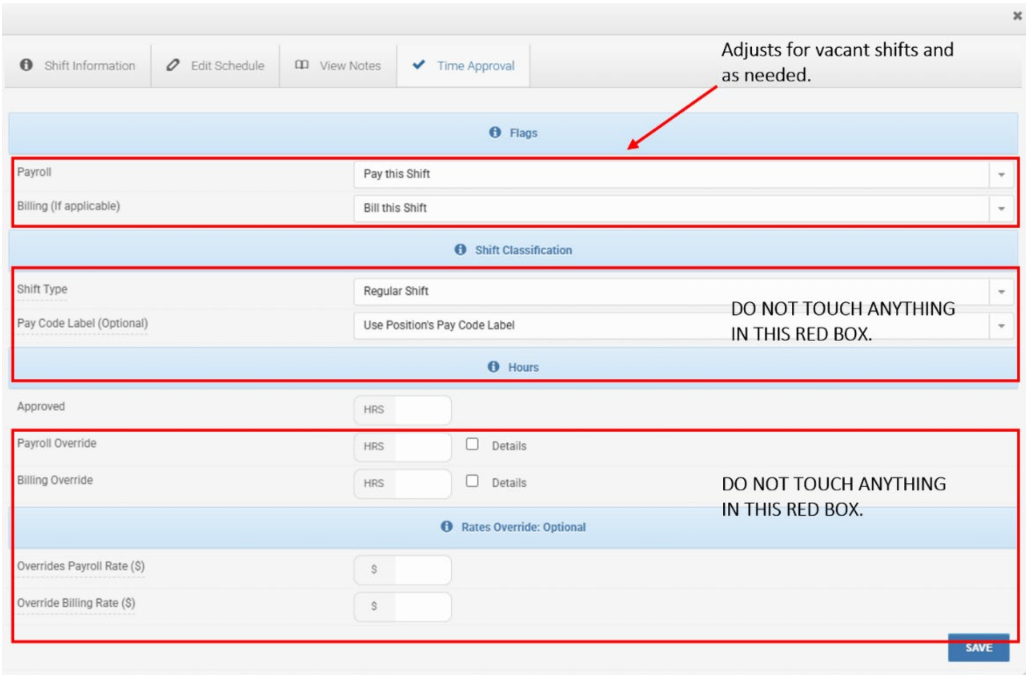
Time Approval

Live Schedule Method - **RECOMMENDED DAILY.**

Navigation: *Schedules and Attendance > Live Schedule*

1. Filter to locate the shifts you are approving. Double-click the shift to edit.
2. Go to the Time Approval tab and update the following fields only:
    a) **Payroll**: Pay this shift or Do not pay this shift
    b) **Billing (if applicable):** Bill this shift or Do not bill this shift
    c) Click Save.
3. Return to the Shift Information tab and click Log Time:
    a) Verify the **Start Time** and **End Time** are accurate.
    b) Set **Approval** to **Approve Shift with this Time.**
    c) Add comments if needed, then click **Save**.

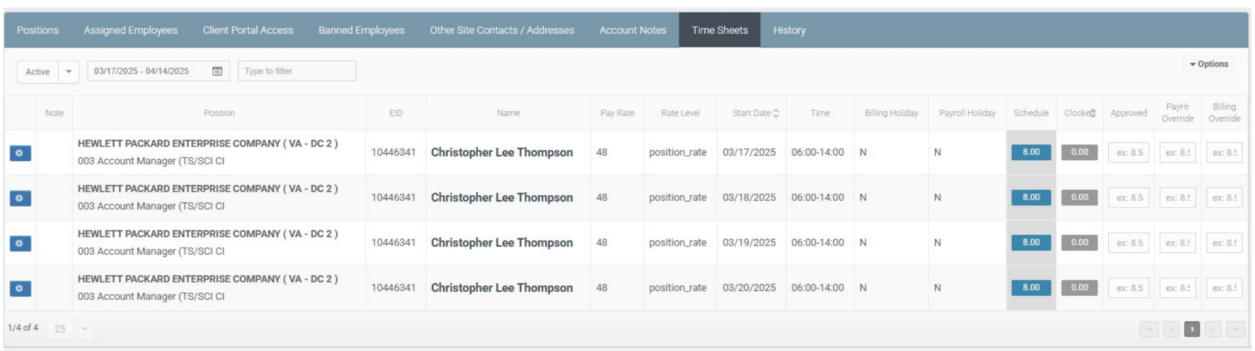
Schedulers: Please follow directions as shown in the image below.



Site Level – Time Approval

Navigation: Sites > Select Site

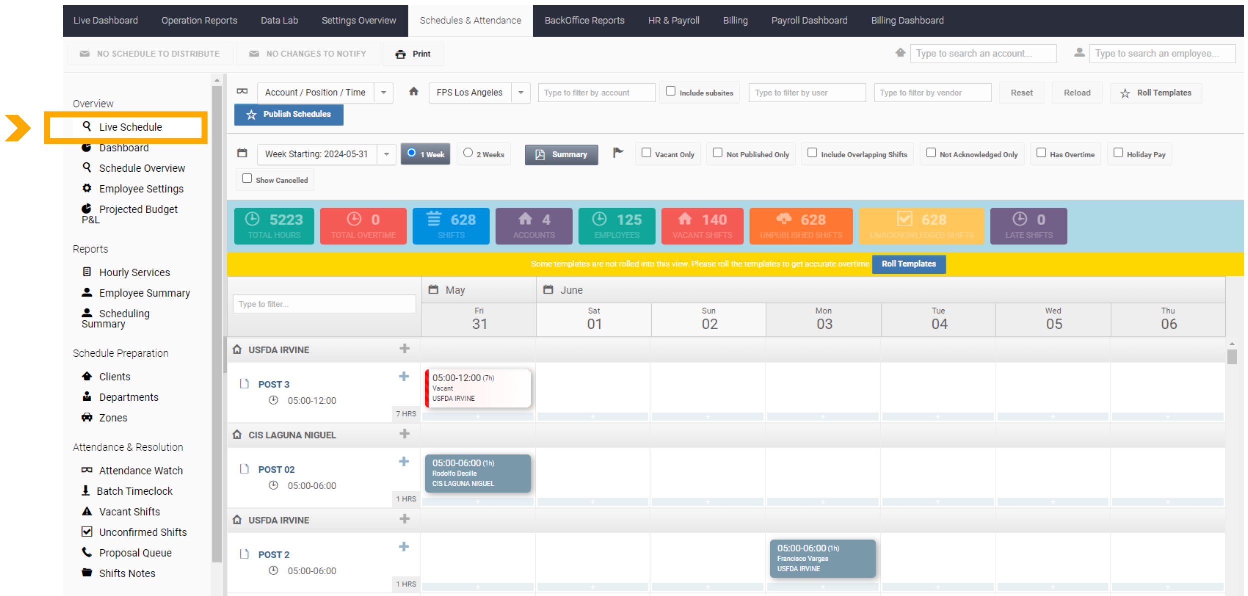
1. Scroll to the bottom and click on "**Timesheets**."
2. To approve time, select the number under either the "**Schedule**" or "**Clocked**" column. This will automatically populate the PayHr Override and Billing Override hours.



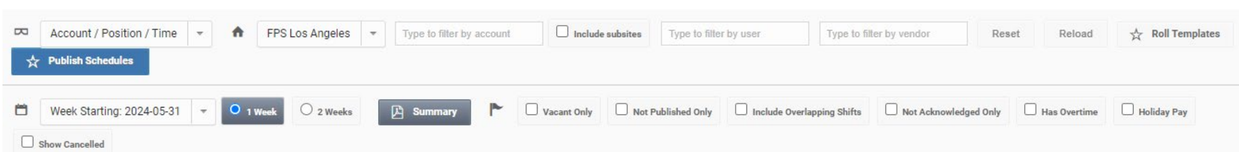
Live Schedule

In the Live Schedule, you can get an overview of shifts across your operation. You can also make changes to individual shifts, allowing you to manage scheduling in one place.

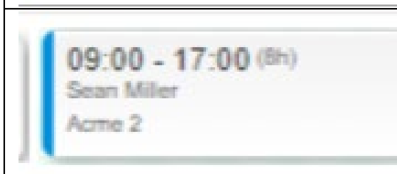
To use the Live Schedule, go to “**Schedules & Attendance**.” Then, “**Live Schedule**.”



To filter the view:



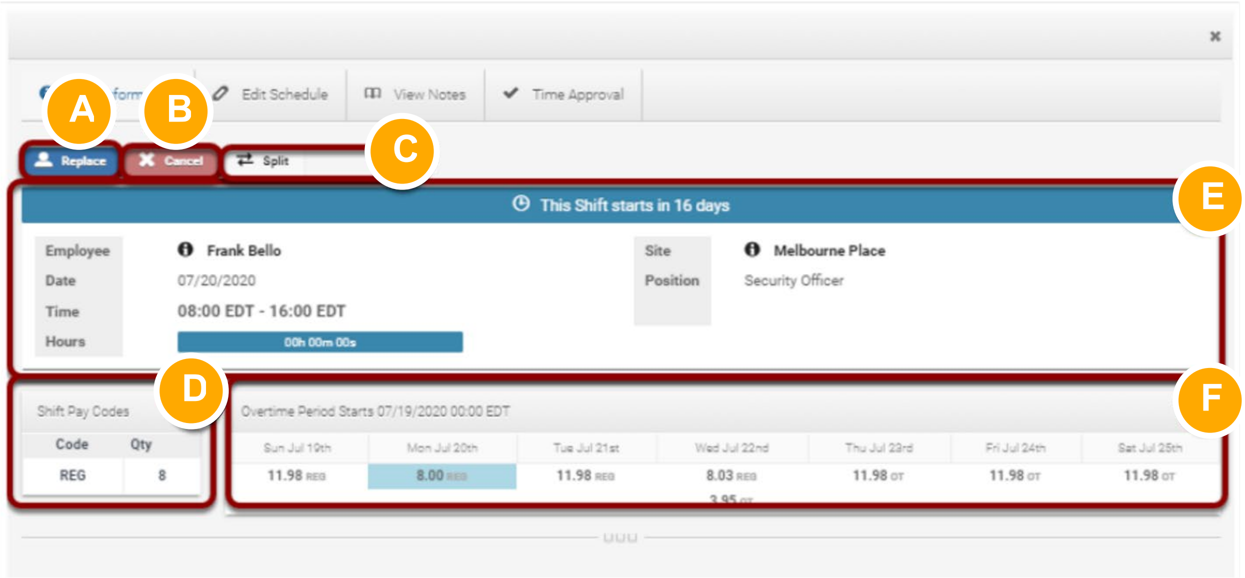
Live Schedule Legend

	**Red Shift**: Vacant shift past and future. The shift scheduled for the current date is not being worked.
	**Yellow Shift**: Shift that has passed and was not working.
	**Green Shift**: Shift that has been working.
	**Purple Shift**: Shift in the future that is assigned (rolled).
	**Grey-blue shift**: Shift that is assigned (not rolled) in the future.
	**Light Blue Shift**: Shift that is currently being worked.

Black Background (Not Pictured): Shifts on closed days appear with a black background.

View/Edit Shift Information – Shift Information

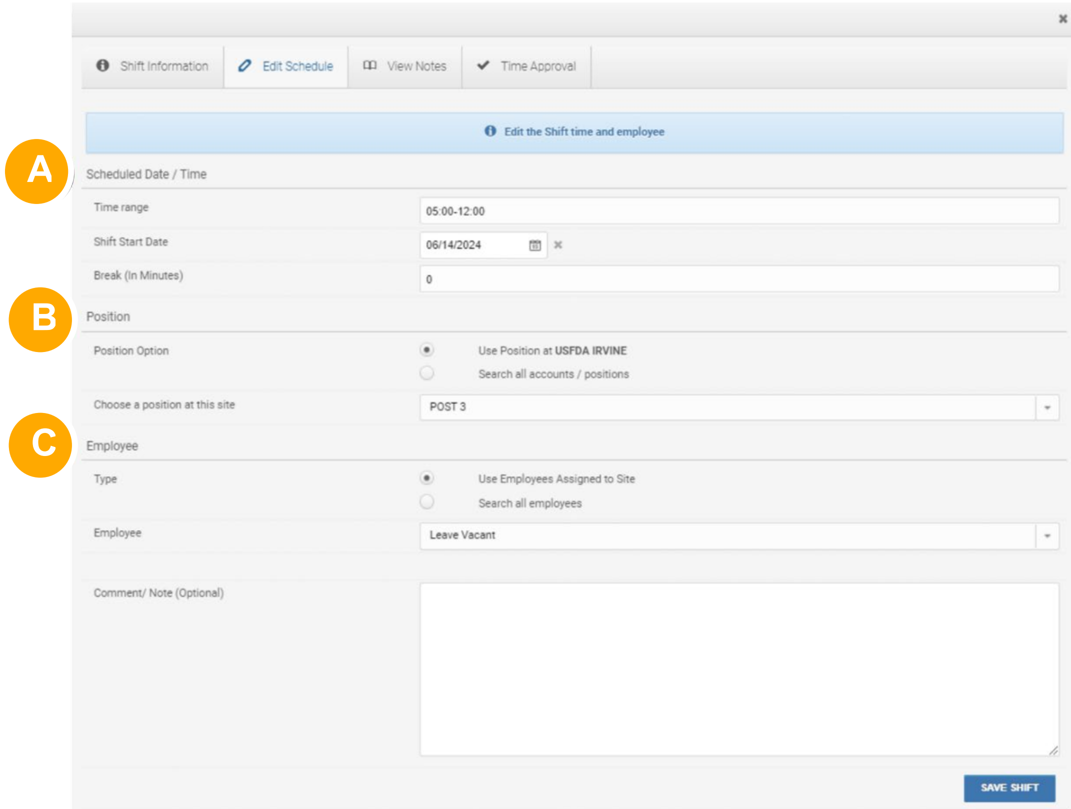
From the **Live Dashboard**, click on a shift:



A. **Replace Button**: Replace the guard assigned to the shift with another guard.
B. **Cancel Button**: Cancel the shift.
C. **Split Button**: Split the shifts between two guards.
D. **Shift Pay Codes**: A breakdown of the number of hours by pay code.
E. **Shift Information**
F. **An analysis of the number of hours by pay code and by day.**

View/Edit Shift Information – Edit Schedule

From the **Live Dashboard**, click on a shift:

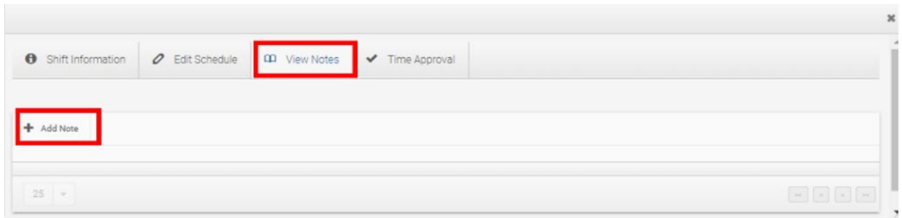


A. **Scheduled Date/Time**
   a. **Time Range**: The start and end times of the shift.
   b. **Shift Start Date**: The date when the shift begins.
   c. **Break (in minutes):** The duration of the break-in minutes.
B. **Position Option**
   a. You can either use a position at the current site or search for a position at all sites/accounts.
   b. **Note**: Archived positions will be available for selection in this section.
C. **Employee**
   a. **Type**: Select from employees assigned to the site or search all employees.
   b. **Employee**: The name of the selected employee.
   c. **Comment/Note (Optional):** Enter an optional note in this field.

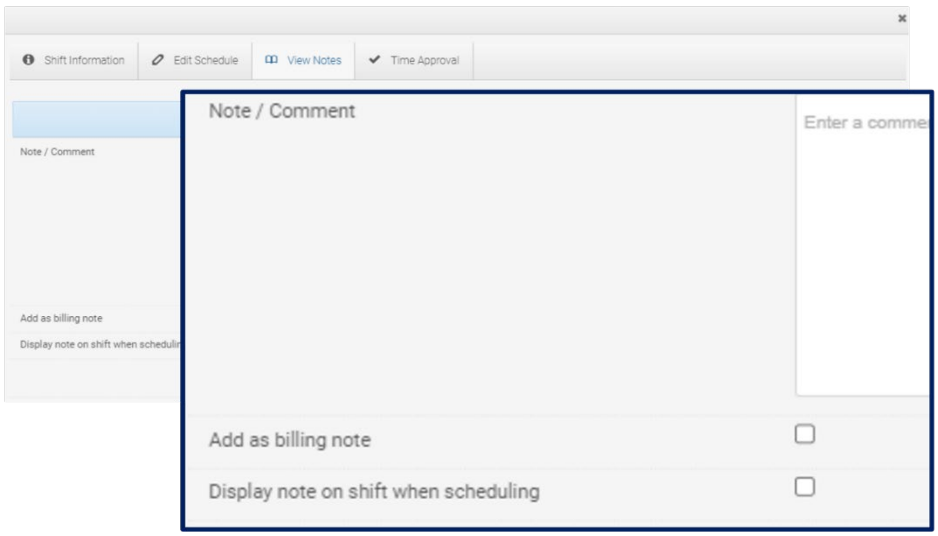
View/Edit Shift Information – View Notes

From the **Live Dashboard**, click on a shift. Go to "**View Notes**." Use this tab to view and enter **shift notes**.

A



B



Note/Comment: Enter notes about the shift.

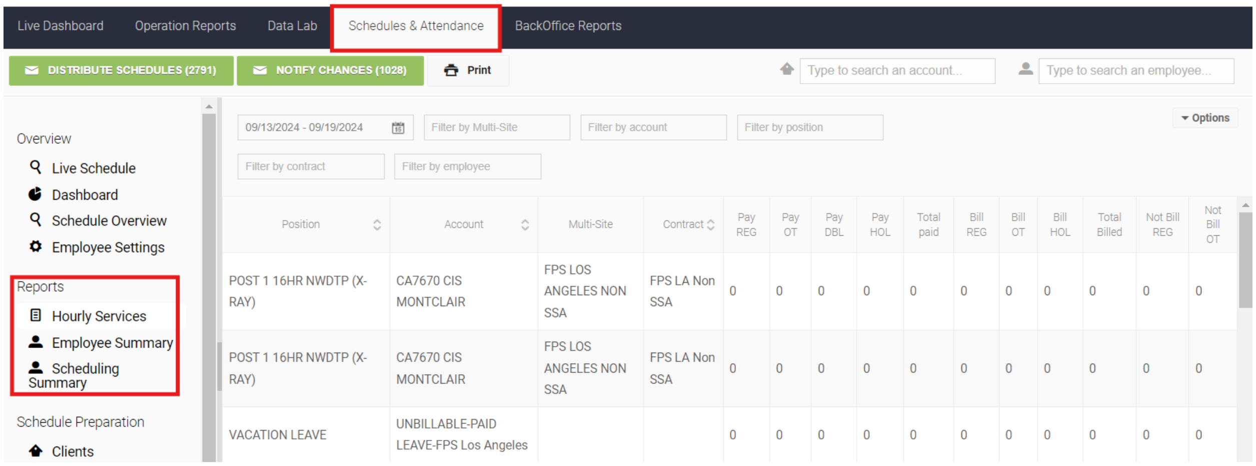
Add as billing note: For reference purposes only. Check the box to flag the note as a billing note.

Reports

Under the Manager role, you have access to view data along with pay rates for your employees. *Please see below the different methods.*

Summaries

1. Navigate to "*Schedules & Attendance*."
2. Go to *Reports* > Hourly Services, Employee Summary, Scheduling Summary.



Hourly Services: Get access to the complete list of services provided hourly with all their details, such as, *Positions, Account, Multi-site Name, Contract, Pay REG, Pay OT, Pay DBL, Pay HOL, Total Pay, Bill REG, Bill OT, Bill HOL, Total Billed, Not Bill REG, and Not Bill OT.*

Position	Account	Multi-Site	Contract	Pay REG	Pay OT	Pay DBL	Pay HOL	Total paid	Bill REG	Bill OT	Bill HOL	Total Billed	Not Bill REG	Not Bill OT
POST 1 16HR NWDTP (X-RAY)	CA7670 CIS MONTCLAIR	FPS LOS ANGELES NON SSA	FPS LA Non SSA	0	0	0	0	0	0	0	0	0	0	0

Employee Summary: This summarizes the employees' scheduled hours and access to view the employee's schedule, including *First Name, Last Name, Region, Type, Pay Type, Actual Hours, Scheduled Hours, Holiday Hours, Total Hours, Overtime Hours, and Overtime Percentage.*

	ID	First Name	Last Name	Region	Type	Pay Type	Min.	Target	Max	Actual	Scheduled	Holiday	Total	Overtime	Overtime %
Setting	990142	**Aaron**	**Cook**	FENOC-Beaver Valley NPS	employee	Hourly				74.65	74.65	0	74.65	34.65	46.42

Scheduling Summary: Provides a summary of all schedules and their respective information for a specific timeframe. This includes *Region Name, Scheduled Hours, Worked Hours, Vacant Hours, Approved Hours, Total Paid Hours, Pay OT, OT%, Pay HOL, Total Billing, Bill OT, and Bill HOL,* along with tiles with the information compiled for total of each item listed.