

2025



# TRACKTIK SCHEDULER



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# **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/

 <i></i>	
	Streamline Your Operations. Please Sign-In: Without Respective Value and or employee 10
Streamline Your Operations. Please Sign-In: Welcome. Please Sign-In	Porget password, click here
yuri.baek@parasys.com	LJ
English -	
Forgot password, circk here	

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.

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YB	Live Dashboard Operation Reports Settings Overview Schedules & Attendance HR & Payroll Billing Opportable Visualization and the sound statement of the sound schedules of the sound schedules and the sound schedules are sound are sound and the sound schedules are sound and the sound schedules are sound at the sound schedules are sound a	1.9473 PAKCAUT
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121	All Events *	
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••• Settings	John Harper clocked in At SAUD Test Ste 1 member 202466 for 80 bodies	
2	35 v	
11		

## 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. Live Dashboard

Gain immediate insights into your field operations, accessing vital data such as field reports, tours, and beyond in real-time.

# 2. Operation Reports

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. Settings

Allows you to activate features and establish system defaults, including configuring report templates, managing roles and permissions, and modifying incident categories.

## 4. Schedules & Attendance

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. HR & Payroll

Utilize TrackTik's HR & Payroll module to produce payroll-ready data derived from employees' shift records.

## 6. Billings

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

Assigned Sites	Employee Matrix	Site Bane	Emergency Contacts	Notes on Employee	Notes by Employee	Availabilities	Work Exception	History					
+ Assign to Site													
Active +													
			Sile			Start Date		Effective Rate Date	Rate	Did	ts Primary	Make Primary	
LOCKHEED	MARTIN						In	itial	\$16.00	Active	No	Make Primary	Reneve
1/1 of 1 25 -													

#### 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.

Search for an account	Туре	an account na	ame			
Employee Start Date 🛈			12	×		
Is primary site						

- 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.

TEMPLATE	<ol> <li>Modification to the master template</li> </ol>	will be applied for schedules starting after 2023-	11-14 Change Template Application Date			
+ ± 🗎 🖂	+ New Position	🚨 Assign Employee 📑 Export	t 🗘 Settings			
L 107 880 SHIFT COUNT SUM HOURS	+ \$81311.51999 REVENUE	9999999 - \$0 LABOR COST	\$81311.519999999999 GROSS PROFIT	C 0% DIRECT LABOR	OPEN SHIFT	
RANCHO SECO - SMUD	۹ View All Posi	tions +				
+ Choose a Position *	i.e 9a-5p 🔶 i.e 15 #	1 All Su Mo Tu V	Ve Th Fr Sa ADD			
Positions	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
A SITE MANAGER		06:00-16:00 10h Vecant	0 06:00-16:00 10h Vacant	06:00-16:00 10h Vacant 0	06:00-16:00 10h Vacant 0	
SEC OPS SPVR		OB 06:00-16:00 10h OKSANA BARDOSH	OB 06:00-16:00 10h OKSANA BARDOSH	08 06:00-16:00 10h OKSANA BARDOSH 0	06:00-16:00 10h OKSANA BARDOSH 0	
SEC SUPER TRAINING     SEC OFFICER TRAINING						
		AB 06:00-14:00 8h AARON BAKER ( RH 06:00-14:00 8h	AB 06:00-14:00 8h AARON BAKER 0	AB 06:00-14:00 8h AARONBAKER 0	06:00-14:00 8h Vecent Shift O AB 06:00-14:00 8h	
	RH 06:00-14:00 8h ROHULLAH HAKIMI PARSA 06:00-14:00 8h	06:00-14:00 Bh Vacant	0 06:00-14:00 8h Vacant 0	06:00-14:00 Sh Vacant	ARUN BARK 0 06:00-14:00 8h Vecent 0	AB 06:00-14:00 sh AARON BAKER 06:00-14:00 sh
	Vecant 06:00-14:00 8h	© 06:00-14:00 8h Vacant 4	0 100-14:00 8h Vacant 0	06:00-14:00 Sh Vacant Ø	06:00-14:00 8h Vacant Ø	06:00-14:00 8h
	14:00-22:00 8h	Vacant Shift	Vacant Shift	14:00-22:00 8h Vacant Shift Ø	Vacant Shift	Vacant GV 14:00-22:00 8h CN/W/0/22/2
SECURITY OFFICER	Vacant shift JR 14:00-22:00 8h	JR 14:00-22:00 8h	JILIAN RIDS	JR 14:00-22:00 8h JULIAN RIOS	GV 14:00-22:00 8h GAVINO VIRAY	JR 14:00-22:00 8h
	JR 14:00-22:00 8h	GV 14:00-22:00 Sh GAVINO VIRAY	GV 14:00-22:00 8h GAVINO VIRAY	GV 14:00-22:00 8h GAVINO VIRAY	JR 14:00-22:00 Bh JOSH REDDING	14:00-22:00 8h
	22:00-06:00 8h Vecant Shift	C 14:00-22:00 8h JOSH REDDING 22:00-06:00 8h	22:00-06:00 8h	14:00-22:00 8h Vacant © 22:00-06:00 8h	14:00-22:00 8h Vecant Ø 22:00-06:00 8h	RP 22:00-06:00 8h ROBERT PRYOR

# 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.

•	🔗 Regions 🛛 📃	ĸ	List	All Sites										
YB	Currently signed-in CIFSO	+	New S	ite 🖌 Bulk Change										
Dashboards	View All Regions	(	• (	Active * All Zones * All	Types * All Re	gions • T	rpe to filter							* Options
	🖻 🗅 Paragon Systems Inc			Account Uid	© Region		Туре	Company	0	Site Address 👙	City©	Main Contact 🔅	Phone	
Sites (Cleant)	Investigations     Paragon Admin		•	#61114_CIFSO-UT_CIFSO-UT	CIFSO-UT	Move	SITE	CIFSO-UT						View
Sites (Client)	B- C Protective Service		_				_	LIMA						_
222	🖻 🗋 Par Ops Area 1	U	-	#61114_CIFSO-UT_001_LIMA	CIFSO-UT	Move	SITE	CIFSO-UT						View
Employees	CIFSO	0	•	#2851	CIFSO-UT	Move	CLIENT	UNBILLABLE-CIFSO-UT						View
<b>M91</b>	CIFSO-CT		•	#2914	CIFSO-UT	Move	CLIENT	UNBILLABLE-PAID LEAVE-CIFSO-UT						View
U.J.	CIFSO-GA	0		#2994	CIFSO-UT	Move	CLIENT	TRAINING-CIFSO-UT						View
Maps	CIFSO-IN	0		#3030	CIFSO-UT	Move	CLIENT	NEW HIRE TRAINING-CIFSO-UT						View
•••	CIFSO-MC		-	10/200 //2	0/500.1/7									
Settings	CIFSO-MS	U		#CIFSO-UT	CIFSO-01	Move	MDE11	CIESO-UT						View
	CIFSO-NV	0	•	#UNBILLABLE-LIMA	CIFSO-UT	Move	CLIENT	UNBILLABLE-LIMA						View
-	- CIFSO-TX			#UNBILLABLE-PAID LEAVE-LIMA	CIFSO-UT	Move	CLIENT	UNBILLABLE-PAID LEAVE-LIMA						View

## Go to "Schedules" tab and click "Prepare."

Overview	Operation Reports	Notifications	Security & Patrol	Billing S	settings Schedules	Contracts
NO SC	HEDULE TO DISTRIBUT	E 🛛 NO CHA	NGES TO NOTIFY	🔁 Print		
<ul><li>Scher'</li><li>Prepare</li></ul>	B • Coverage Per Hou	ır Report 📅 Prin	t Position Schedule			
< >	]		June	2024		
Su	n M	on	Tue	Wed	Thu	Fri
	26	27	28	29	30	

Select the start date for the template.

0	Please indicate on 1	what da	ate the	templ	ate sho	uld s	tart being a	pplied	
				_					
Template Start Date	06/12/3	2024		1	ж				
	<	Jun	_	~	2024	~	1>	_	_
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Cano	cel Sav
	26	27	28	29	30	31	1	_	_
	2	3	4	5	6	7	8		
	9	10	11	12	13	14	15		
			10	10	20	21	22		
	16	17	18	1.5	20	-	~~		

# **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	o "Schedule." scł	IEDULE	
Then, click " <b>Settinç</b>	JS."		
SCHEDULE	Week Starting: 2024-05-3	1 -	
<b>•</b> 2	New Positi	on 💄 Assign Employee 🖆 Export 🏚 Settings	
			×
③ Schedule Setting	Schedule Options		
Closed Days	Show Closed Days in Template	Yes	-
Position Setting	A Changing	the cycle length or cycle first day will clear your template	
В	setup the schedule template cycle sett	ings	
	Schedule Cycle	<ul> <li>7 day cycle. Every week on the same day</li> <li>14 day cycle. Alternate schedule from one week to another</li> <li>Custom cycle. Will not happen on the same week days</li> </ul>	
		Reference Date	
C	First Period Start Date	04/26/2024	
		s	AVE

#### A. Schedule Options:

- Show Closed Days in Template: Yes or No
- Enable Open Shifts: Yes or No
  - o (**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.

TEMPLATE	Modification to the master temp	alate will be applied for schedules	starting after 2020-03-16 Chan	ge Template Application Date				6
▲ ▲ 🗂 💌 ▲ 5 🕑 40	+ ☆ ≊ New Po	eition 👤 Assign Emp	loyee 🕑 Export	🎝 Settinge				Patrick White
Area 10	REVENUE View All F	AGOR COST GROSS PRO	HT DIRECT LABOR	VACANT				Carlos Williams ③
+ Choose a Position + C	) ie 9a-5p 🔶 ie 15	# All 🗉 Sa 🗐 🤅	Su Mo Tu We	The Fre ADD				Mikael Braun 🛞
Positions	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Jeremy Greene 📀
Armed Guard (CTC) and Requirements: Firearm Permit Conditional Requirements: Other's License Gondat			09-17 8h Andri Roy C	09-17 Bh Ands Roy	O 09-17 Bh Ande Ray C	09-17 en Andre Roy	09-17 Bh Andre Roy 0	Peter Daniels ③
9 Français tarts: 2019-07-01								Ob     Debbie Thomson
Unarmed Guard								Matthew Beaudoin
	05		8h	85	85	Rh		G Melissa Burke 🕥
	51	511		01	011	01	UI .	André Roy 040h
			2 *	Deselect Shifts 0 Shift	s Sele 3 X Delete			

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

	S 🖈 🖴 New Po	sition 🔔 Assign E	imployee 😫 Expo	rt O Settings			1 PUBLISH (0 Shifts)	Filter user list	
() 175.5 + S	3342 - \$897 MALE CONT	.9 🙆 \$2444	.1 6 27%	≗ 20 5HE/TS	1			Assign Emp 16 hidden emplo	loyee yee •
Slaka Spa	<b>9</b> 11	ev All Positions +						Vacant Shift	2
Positions	Mon 24	Tue 25	Wed 26	Thu 27	<sup>Pri</sup> 28	Sat 29	sun 30	Shift Board	
Unarmed Guard (SS) d Requirements Finearm Permit rts: 2019-06-01								Mikael Braun ල 6 \$0 Total 00h	*
					<i>c</i>			Javier Gupton © \$140.4 Total © 33h	
Standing Guard - Armed	Saul III		8514 <b>1</b>					Sarah Evans © • \$0 Total © 0h	
Requirements insern Pernit ± 2019-08-01			14-23 Vener (201		09:30-17 Peter Davids 0			Detrick White	
		annannis		annun 11		Annual III.		Mark Tudor © # \$0	â

# Assign A Different Guard

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

SCHEDULE	Custom Period *	08/24/2020 - 08/30/20	20					10	
	S 📩 📾 New Por	sition 🚊 Assign E	imployee [the Expo	rt O Settings			1 PUBLISH (0 SMIS)	Filter user Inf	
(175.5 + \$	3342 <b>— \$897</b> .	.9 @ \$2444 GROSS PROFIT	.1 © 27% Difect Labor	20 54675	1	7 59.89	TIME O STE OVERTIME	Assign E	mployee ployee =
A Slaka Spa	9 Vi	ew All Positions =						Vacant Shift	
Positions	Mon 24	т <sub>ин</sub> 25	Wed 26	Thu 27	<sup>Fri</sup> 28	Sat 29	sun 30	Shift Board	
Unarmed Guard (SS) Ird Repuirements: 5 Freezen Pernit Larte: 2019-06-01	TOTAL DO	222 <u>2</u>						Mikael Braun © © SO Total © Oh	4
								Javier Gupton © © \$140.4 Total © 335	2
Standing Guard - Armed			05-14					Sarah Evans © © SO Total © Dh	
l Baquinementa: Finaarm Perrat ta: 2019-06-01			14-23 Vicant Eliter		09:30-17 Peter Davids 0			Patrick White	
	annannes	annum		annum		annum		Mark Tudor © € 50	à

# 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-todate 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.



<u>Note</u>: 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. <u>**Review**</u> the information that you have newly added/updated.
- 2. <u>**Roll**</u> 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 1 PUBLISH (16 Shifts)
  - 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.

		Main Campus
Pu	blishi	ng will make schedules available by the employees.
love Vacant Shifts to Open Shifts		0
love Conflicts to Open Shifts	6	
ate Range (Inclusive)		01/01/2022 - 01/16/2022

 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.

						×
PNC Arena	Thomas Dundon			(1) Choose date range	2 Review and Confirma	tion
Overview Notifications Operation R	eports Security & Patrol Message Board	Billing Settings Visitor Management Street/es Contracts Mobile Dispatch LoneW	forker Setup	You are about to send the sci	Distribute schedu medules to 5 employees	iles for Slaka Spa
<ul> <li>Schedule Calencar View</li> <li>Prepara</li> <li>Coverage Per Hour Report</li> </ul>	Print Position Schedule					CONFIRM
< >		March 2020	×			- Options
Sun 1	Mon	Choose date range     (2) Review and Confirmation	^ u	Employee	Shifts Count	Empl
	07:00am - 02:00pm Bric Staat PNC Arena / Unamed Security Osard	O You are about to send the schedules for the period below.	unty Guard	Patrick White	1	tbelloginomail.com patrick@neguards.com
letesetesetes		Resent already distribute  Date range to distribute  (3)11/2020 - 04/08/2020		Mikael	а	mikael@tracktik.com
		NEXT	- 22	Sarah	4	:@tracktik.com
				Karl Andrew	2	mk@test.com
8	9	10 11		Karine '	а	gitest.com
				1/6 of 6 25 -		

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.

Shift Information     Z Edit Schedule	e 🛛 View Notes 👻	Time Approval	Adjusts for vacant shifts and as needed.
		1 Flags	
Payroll	Pay this Sh	ift	
Billing (If applicable)	Bill this Shi	ft	
		Shift Classification	
Shift Type	Regular Shi	ift	
Pay Code Label (Optional)	Use Positio	n's Pay Code Label	IN THIS RED BOX.
		Hours	
Approved	HRS		
Payroll Override	HRS	Details	
Billing Override	HRS	Details	DO NOT TOUCH ANYTHING
		Rates Override: Optional	IN THIS RED BOX.
Overrides Payroll Rate (\$)	\$		
Override Billing Rate (\$)	8		

## 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.

Pos	tions	Assigned Employees Client Portal Access Banned	Employees	Other Site Contacts / Addresses	Account	Notes Time	Sheets Hi	story							
A	tive	- 03/17/2025 - 04/14/2025 III Type to filter												+ (	Options
	Note	Position	EID	Name	Pay Rate	Rate Level	Start Date 🗘	Time	Billing Holiday	Payroll Holiday	Schedule	Clocke <b>C</b>	Approved	PayHr Override	Billing Override
0		HEWLETT PACKARD ENTERPRISE COMPANY ( VA - DC 2 ) 003 Account Manager (TS/SCI CI	10446341	Christopher Lee Thompson	48	position_rate	03/17/2025	06:00-14:00	N	N	8.00	0.00	ex: 8.5	ex. 8.5	ex: 8.5
0		HEWLETT PACKARD ENTERPRISE COMPANY (VA - DC 2) 003 Account Manager (TS/SCI CI	10446341	Christopher Lee Thompson	48	position_rate	03/18/2025	06:00-14:00	N	N	8.00	0.00	ex: 8.5	ex: 8.5	ex: 8.5
0		HEWLETT PACKARD ENTERPRISE COMPANY ( VA - DC 2 ) 003 Account Manager (TS/SCI CI	10446341	Christopher Lee Thompson	48	position_rate	03/19/2025	06:00-14:00	N	N	8.00	0.00	ex: 8.5	ex: 8.5	ex: 8.5
0		HEWLETT PACKARD ENTERPRISE COMPANY (VA - DC 2) 003 Account Manager (TS/SCI CI	10446341	Christopher Lee Thompson	48	position_rate	03/20/2025	06:00-14:00	N	N	8.00	0.00	ex: 8.5	ex: 8.5	ex: 8.5
1/4 of	25														

# **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."

Live Dashboard Operation R	eports Data Lab Settings O	verview Schedules & Attendance	BackOffice Reports F	HR & Payroll Billing	Payroll Dashboard Bil	ling Dashboard		
NO SCHEDULE TO DISTRIBU	TE 🛛 NO CHANGES TO NOTIFY	🙃 Print				Type to search an	account 🎗 Type	to search an en
Overview <b>Q</b> Live Schedule	Account / Position / Time	FPS Los Angeles 👻	Type to filter by account	Include subsites	ype to filter by user	Type to filler by vendor	Reset Reload	📩 Roll Template
<ul> <li>Dashboard</li> <li>Schedule Overview</li> <li>Employee Settings</li> </ul>	Week Starting: 2024-05-3	1 • O 1 Week	🕒 Summary 🏲 🗌	Vacant Only Not Publis	hed Only Include Overlappin	ng Shifts Not Acknowledg	ed Only 🗌 Has Overtime	Holiday Pay
Projected Budget P&L			4 (125 EXAMPLIOYEES	♠ 140 VACANT SHIFTS	628	628	O LATE SHIETS	
Reports								
Hourly Services					plates to get accurate overtime	Roll Templates		
Employee Summary		🗂 May	🗂 June					
Scheduling Summary	Type to filter	Fri 31	Sat 01	Sun 02	Mon 03	Tue 04	Wed 05	Thu 06
Schedule Preparation	USFDA IRVINE	+						
<ul> <li>Clients</li> <li>Departments</li> </ul>	<ul> <li>POST 3</li> <li>05:00-12:00</li> </ul>	+ 05:00-12:00 (7h) Vecent USFDA IRVINE	]					
Zones		/ nks						
Attendance & Resolution	LIS LAGUNA NIGUEL	r						
🕶 Attendance Watch	D POST 02	C5:00-06:00 (1h) Rodolfo Decille						
L Batch Timeclock	④ 05:00-06:00	CIS LAGUNA NIGUEL						
A Vacant Shifts		1485						
<ul> <li>Unconfirmed Shifts</li> </ul>	U OSPDA IKVINE							
Proposal Queue	D POST 2	+			05:00-06:00 (1h) Francisco Vargas			
Shifts Notes	④ 05:00-06:00	1 HRS			USFDA IRVINE			
Approval & Audit								

## To filter the view:

∞	Account / Position / Time    Publish Schedules	FPS Los Angeles	<ul> <li>Type to filter by account</li> </ul>	Include subsiter	B Type to filter	by user Type to fill	ler by vendor Res	et Reload	☆ Roll Templates
	Week Starting: 2024-05-31 👻 🖸	1 Week O 2 Weeks	👌 Summary	Vacant Only N	lot Published Only	Include Overlapping Shifts	Not Acknowledged Only	Has Overtime	Holiday Pay

# Live Schedule Legend

09:00 - 21:00 (12h) Vacant Acme 1	<b>Red Shift</b> : Vacant shift past and future. The shift scheduled for the current date is not being worked.
09:00 - 17:00 (8h) Sean Miller Acme 1	<b>Yellow Shift</b> : Shift that has passed and was not working.
09:00 - 17:00 (8h) Sean Miller Acme 1	Green Shift: Shift that has been working.
09:00 - 17:00 (8h) Sean Miller Acme 2	<b>Purple Shift</b> : Shift in the future that is assigned (rolled).
09:00 - 17:00 (8h) Sean Miller Acme 2	<b>Grey-blue shift</b> : Shift that is assigned (not rolled) in the future.
09:00 - 17:00 (8h) Sean Miller Acme 2	<b>Light Blue Shift</b> : 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 for	В	2 Edit Schedule	ID View Notes	<ul> <li>Time Approval</li> </ul>					
Replace	X Cancel	₽ Split	<u> </u>	(h) This Shift etc.	arte in 16 dave	91			
mployee	<b>6</b> Fi	rank Bello		O misouritate	Site	Ø Melb	ourne Place		
ate	07/20/2020				Position Security Officer				
me	08:00	EDT - 16:00 EDT							
ours		00h 00m 00s							
t Pay Codes		Overtime Period Start	s 07/19/2020 00:00 EDT						
Code (	Qty	Sun Jul 19th	Mon Jul 20th	Tue Jul 21st	Wed .	Jul 22nd	Thu Jul 23rd	Fri Jul 24th	Sat Jul 25th
REG	8	11.98 REG	8.00 #89	11.98 REG	8.0	3 RED	<b>11.98</b> ot	<b>11.98</b> ot	11.98 or

- 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:

	Edit the Shift time and employee
Scheduled Date / Time	
Time range	05:00-12:00
Shift Start Date	06/14/2024 🛅 🛪
Break (In Minutes)	0
Position	
Position Option	Use Position at USFDA IRVINE     Search all accounts ( positions
Choose a position at this site	POST 3
Employee	
Туре	Use Employees Assigned to Site
	Search all employees
Employee	Leave Vacant
Comment/ Note (Optional)	

#### 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**.

Shift Information	dit Schedule 🗰 View Notes 🛩 Time Approval	
+ Add Note		
25 *		
Shift Information	dit Schedule 🖸 View Notes 🛩 Time Approval	
	Note / Comment	Enter a c
Note / Comment		
Add as billing note		
Display note on shift when scheduli		
	Add as billing note	

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.

Live Dashboard Operation Re	ports Data Lab Sched	ules & Attendance Bad	kOffice Reports												
DISTRIBUTE SCHEDULES (279	1) 🛛 NOTIFY CHANGES (1	028) 🕂 Print				4	Type to s	search a	n account		•	Type t	o search a	an employ	ee
Overview	▲ 09/13/2024 - 09/19/2024	Filter by Multi-Site	Filter by ac	count	Filter	r by posil	lion							•	Options
Q Live Schedule	Filter by contract	Filter by employee													
Schedule Overview     Employee Settings	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
Reports	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
<ul> <li>Employee Summary</li> <li>Scheduling Summary</li> </ul>	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
Schedule Preparation <ul> <li>Clients</li> </ul>	VACATION LEAVE	UNBILLABLE-PAID LEAVE-FPS Los Angeles			0	0	0	0	0	0	0	0	0	0	0

**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 Namé	Last Name	Region	Type	Рау Туре	Min.	Target	Max	Actual	Scheduled	Holiday	Total	Overtim®	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.* 

2024-08-18 - View All Regions -													
O 9137 TOTAL HOURS	• 91 PAID H	121.5 IOURS	VORKED			9137 APPROVED	(b) TO	9121.5 TAL PAID	C	1206. PAY OT	25	D D	
• <b>8677.</b> TOTAL BILLE	.25 <b>(</b> €	<b>1206.25</b> вішот	BILL HOL										
													- Options
Region			Scheduled	Worked	Vacant	Approved	Total pai¢	Pay OT	OT%	Pay HOL	Total Billed	Bill OT	Bill HOL
Duke - Oconee	♣ By Account	♦ By Employees	2042.25	0	0	2042.25	2042.25	225.00	11%	0.00	1970.25	225	0