

DatumRPO

CLIENT
“HOW TO DO GUIDE”

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HOW TO LOG INTO UNIVERSE

Signing In To Universe?

Open your web browser and go to Universe (universe.datumrpo.com) You will have already received your email address and password from IT.

The Universe application has been modified to allow users to use their normal network password for access. All other users will experience no change to the password they use.

On the first screen, every user is required to enter in their email address and password, then to click the **Log in** button.

Log in to Universe

If your organisation has Single Sign On, choose the relevant provider.
Otherwise enter your email and password below.

Continue with Single Sign On

Email
agency_1@universe.com

Password

[Forgotten your password?](#)

Log in

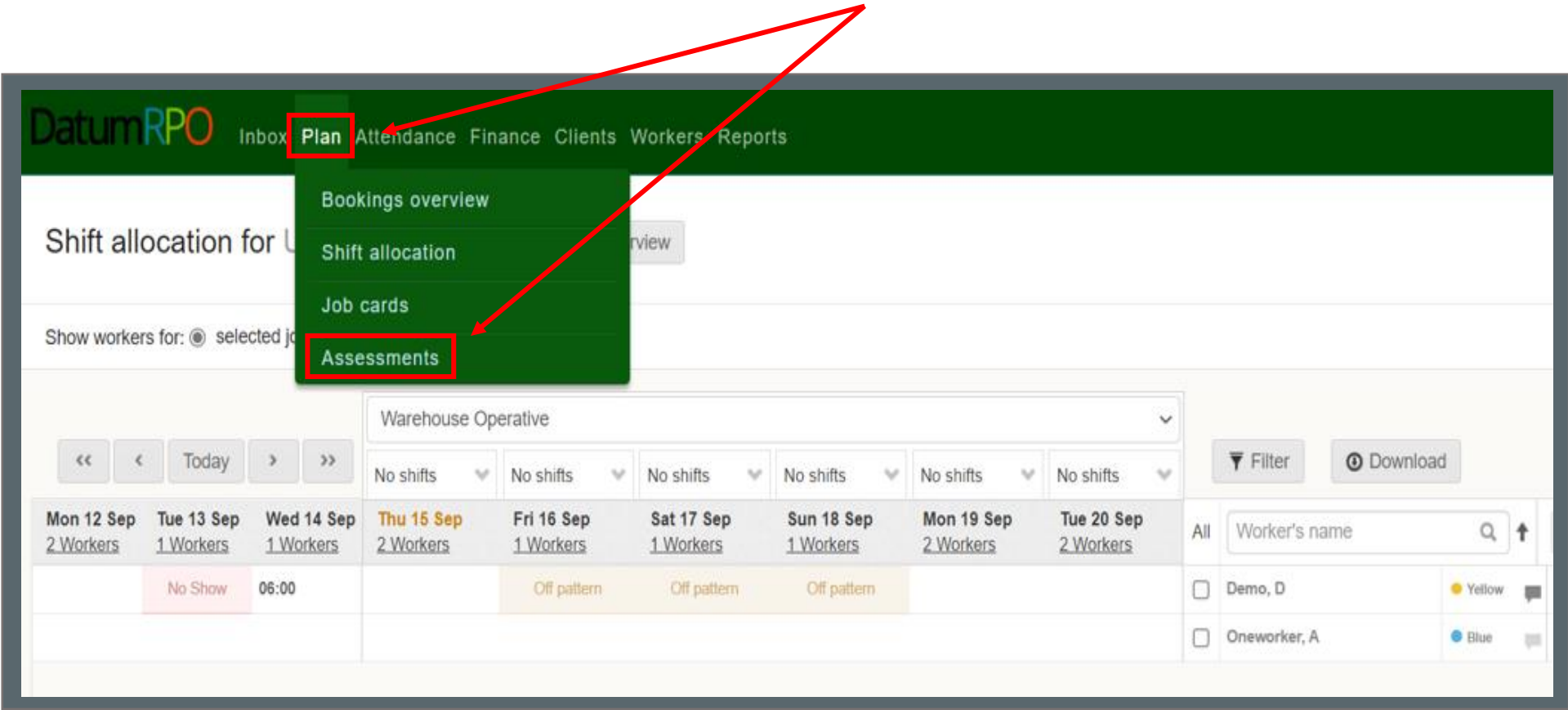
TOP TIP - save Universe to your favourites tab in your browser so you can locate it quicker!

PLAN

ASSESSMENTS

Where To Go To Book Assessments?

To view or create assessments, go to 'Plan' and select 'Assessments'



The screenshot shows the DatumRPO interface. The top navigation bar is dark green with the DatumRPO logo and links to Inbox, Plan, Attendance, Finance, Clients, Workers, and Reports. The 'Plan' link is highlighted with a red box. A dropdown menu is open from 'Plan', showing options: Bookings overview, Shift allocation, Job cards, and Assessments. The 'Assessments' option is highlighted with a red box. Two red arrows point from the text above to these two boxes. Below the menu, the main content area shows 'Shift allocation for U' and a 'Show workers for:' dropdown set to 'selected jobs'. A calendar view for 'Warehouse Operative' is displayed, showing dates from Mon 12 Sep to Tue 20 Sep. The calendar cells show worker counts and status (e.g., 'No Show', 'Off pattern'). On the right, there are 'Filter' and 'Download' buttons, a search bar for 'Worker's name', and a list of workers: 'Demo, D' (Yellow) and 'Oneworker, A' (Blue).

Where To Go To Book Assessments?

Next, use the dropdown box to select the site you wish to create or view assessments for.

The screenshot displays the DatumRPO web application interface. At the top, a dark green navigation bar contains the DatumRPO logo and several menu items: 'Inbox', 'Plan', 'Attendance', 'Finance', 'Clients', 'Workers', and 'Reports'. On the right side of this bar, there is a red square icon with 'AA' and a dropdown menu labeled 'Agency_1 Admin'. Below the navigation bar, the main content area is titled 'Assessments for UAT Site'. To the right of this title is a blue button labeled 'Follow?' and a grey button labeled '+ Book an assessment'. A dropdown menu is open, showing a search bar 'Search for sites...' and a list of site options. The options are: 'Agency_1 / HQ', 'AMK / AMK Peterborough', 'ARGOS Home Delivery DHL / Acton Gate - Transport', 'ARGOS Home Delivery DHL / Acton Gate - Warehouse', 'ARGOS Home Delivery DHL / Argos Aberdeen Transport', 'ARGOS Home Delivery DHL / Argos Aberdeen Warehouse', 'ARGOS Home Delivery DHL / Carlisle', and 'UAT Client / UAT Site'. The background of the interface shows a calendar grid with columns for 'Monday', 'Thursday', 'Friday', 'Saturday', and 'Sunday'. The 'Monday' column shows dates '05 Sep' and '12 Sep' with a '+' icon. The 'Friday' column shows dates '09 Sep', '16 Sep', and '17 Sep' with a '+' icon. The 'Saturday' column shows dates '10 Sep' and '17 Sep' with a '+' icon. The 'Sunday' column shows dates '11 Sep' and '18 Sep' with a '+' icon. The '16 Sep' date is highlighted in yellow. A red arrow points from the 'Assessments for UAT Site' dropdown to the 'UAT Client / UAT Site' option in the list.

Monday	Thursday	Friday	Saturday	Sunday
05 Sep +		09 Sep +	10 Sep +	11 Sep +
12 Sep +		16 Sep +	17 Sep +	18 Sep +

Where To Go To Book Assessments?

Click the + on the date you wish to create the assessment, or you can click + Book an assessment

The screenshot shows the DatumRPO web application interface. At the top is a dark green navigation bar with the DatumRPO logo and menu items: Inbox, Plan, Attendance, Finance, Clients, Workers, and Reports. On the right of the bar is a user profile for 'AA Agency_1 Admin'. Below the navigation bar, the page title is 'Assessments for UAT Site' with a 'Follow?' button. A '+ Book an assessment' button is located in the top right corner of the main content area. Below this is a calendar grid for the month of September. The grid has columns for each day of the week. The first row shows dates from 05 Sep to 11 Sep, and the second row shows dates from 12 Sep to 18 Sep. The date 15 Sep is highlighted in yellow, and a red square is drawn around the '+' icon in that cell. A red arrow originates from the '+ Book an assessment' button and points to this '+' icon.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
W36	05 Sep +	06 Sep +	07 Sep +	08 Sep +	09 Sep +	10 Sep +	11 Sep +
W37 (current)	12 Sep +	13 Sep +	14 Sep +	15 Sep +	16 Sep +	17 Sep +	18 Sep +

Where To Go To Book Assessments?

In the pop-up box, enter the workers name, the job card the assessment will be for, the assessment date and time (time is optional) along with any other relevant information – then click [Book an assessment](#)

Book an assessment

Worker:

Job card:

Optional

Assessment date:

Time is optional

Comment:

You will now see the assessment on the day you selected. Clicking on the assessment will allow you to update the assessment record in the pop-up box. To complete the update click [Update assessment record](#)

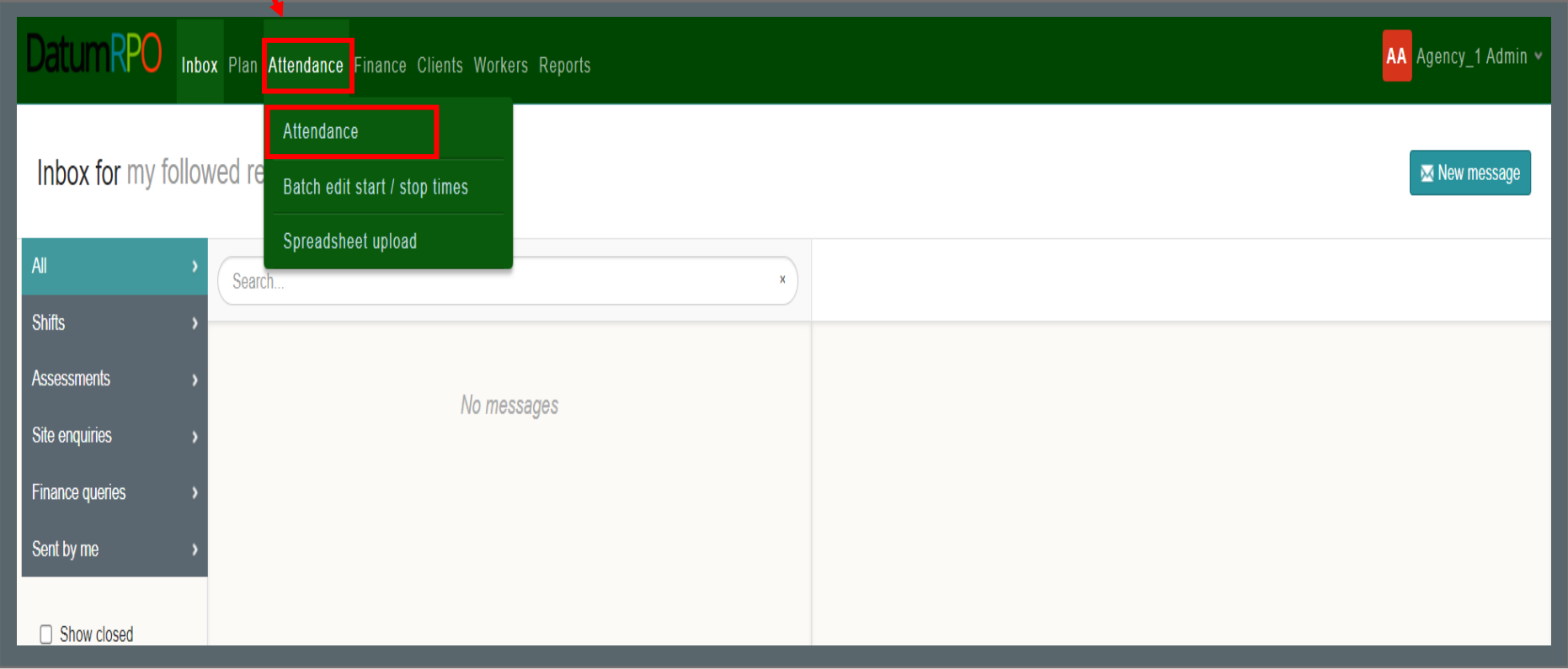
The screenshot displays the 'Assessments for UAT Site' interface in DatumRPO. The top navigation bar includes 'Inbox', 'Plan', 'Attendance', 'Finance', 'Clients', 'Workers', and 'Reports'. The main header shows 'Assessments for UAT Site' with a 'Follow?' button. Below this is a calendar grid for assessments. The grid has columns for 'Monday', 'Tuesday', 'Wednesday', and 'Thursday'. The 'Thursday' column shows a yellow highlight for '15 Sep' with a blue box containing '09:00 Demo, D.'. A red box highlights this entry, and a red arrow points from it to a modal window titled 'Update assessment record'. The modal contains the following fields:

- Worker: [Dan Demo](#)
- Site: [UAT Site](#) (UAT Client).
- [More details...](#)
- Job card: Warehouse Operative (dropdown)
- Optional: (checkbox)
- Assessment Status:
 - ☒ Booked
 - ☐ Failed
 - ☐ Passed
 - ☐ Cancelled by hirer
 - ☐ Cancelled by worker
 - ☐ Did not attend
- Assessment date: 15-09-2022 (calendar icon), 09 (time dropdown), 00 (time dropdown). Time is optional.
- Comment: (text area)
- Buttons: Cancel, Update assessment record (highlighted with a red box).

ATTENDANCE

Where To Go To Find Attendance?

Go To Attendance > Attendance



How To View Your Attendance?

Page view shows calendar and no shifts booked. You Also need to make sure you are on the correct site page if you have more than one client

DatumRPO

[Inbox](#) [Plan](#) **Attendance** [Finance](#) [Clients](#) [Workers](#) [Reports](#)

AA Agency_1 Admin ▾

Attendance for Test Site ▾ [Follow?](#)

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Wednesday 14 September Today

Worker	Status	Booked	Start	Stop
There are no shifts booked.				

Where To Start The Clock For A Worker?

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

AA Agency_1 Admin

Attendance forSystems TestFollowing

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Late starting shifts:

	Booked	Late by
Wright Ian	11:50	118h 11m

Friday 9 September5 days ago

Worker	Status	Booked	Start	Stop
11am				
IW Ian Wright	Awaiting worker	06:00	Start	

Wednesday 14 SeptemberToday

Worker	Status	Booked	Start	Stop
3pm				
GX Granit Xhaka	Awaiting worker	15:00	Start	
4pm				
BS Bukayo Saka	Awaiting worker	16:00	Start	

From the Attendance page you can start and stop times. Next click on 'Start'.

Where To Start The Clock For A Worker?

DatumRPO

Inbox Plan Attendance Finance Clients Workers Reports

AA Agency_1 Admin

Attendance for

Systems Test

Following

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Late starting shifts:

	Booked	Late by
Wright Ian	11:50	118h 11m

Friday 9 September

5 days ago

Worker

11am

IW

Was the worker late?

The shift is starting 2 hours 47 minutes late. Do you want to record the worker as late for the shift?

☐ yes ☒ no

Ok

Worker

3pm

GX

Granit Xhaka

Awaiting worker

15:00

Start

Worker

4pm

BS

Bukayo Saka

Awaiting worker

16:00

Start

If you don't start the clock on time or the worker is late, you will be asked if they are late. Click "Yes" or "No".

Next click on 'Ok'.

Where To Start The Clock For A Worker?

DatumRPO

Inbox

Plan

Attendance

Finance

Clients

Workers

Reports

AA

Agency_1 Admin

Test7689AA has not been recorded late for this shift

Attendance for

Systems Test

Following

September 2022

MO

TU

WE

TH

FR

SA

SU

29

30

31

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

1

2

Select today

Late starting shifts:

Wright Ian

Booked

Late by

06:00

2h 53m

Friday 9 September

5 days ago

Worker

Status

Booked

Start

Stop

11am

IW

Ian Wright

In progress

06:00

08:47

Stop

Wednesday 14 September

Today

Worker

Status

Booked

Start

Stop

3pm

GX

Granit Xhaka

Awaiting worker

15:00

Start

4pm

BS

Bukayo Saka

Awaiting worker

16:00

Start

At the top of your page, you will see the worker has been recorded as late.

You can now see the worker is in progress and you can see when the shift has started.

For anyone late or a no show, the clock will keep running.

Where To Start The Clock For A Worker?

DatumRPO

Inbox Plan Attendance Finance Clients Workers Reports

AA Agency_1 Admin

Attendance for

Systems Test

Following

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Late starting shifts:

	Booked	Late by
Wright Ian	06:00	2h 53m

Friday 9 September

5 days ago

Worker	Status	Booked	Start	Stop
11am				
IW Ian Wright	Awaiting worker	06:00	08:47	Stop

Wednesday 14 September

Today

Worker	Status	Booked	Start	Stop
3pm				
GX Granit Xhaka	Awaiting worker	15:00	Start	
4pm				
BS Bukayo Saka	Awaiting worker	16:00	Start	

We are now going to start the clocks. You can either start as 'Start shift' or 'Start shift at booked time'.

If you select start shift it will ask if the worker is late if after the start time.

What To Do If A Worker Is Late?

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

AA Agency_1 Admin

Attendance forSystems TestFollowing

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Friday 9 September5 days ago

Worker	Status	Booked	Start	Stop
11am				
<div><div></div>IW</div> Ian Wright	In progress	06:00	08:47	Stop

Wednesday 14 SeptemberToday

Worker	Status	Booked	Start	Stop
3pm				
<div><div></div>GX</div> Granit Xhaka	In progress	06:00	08:47	Stop
4pm				
<div><div></div>BS</div> Bukayo Saka	In progress	10:00	10:00	Stop

You can now see the workers are in progress.

Next, we will stop the clock.

What To Do If A Worker Is Late?

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

AA Agency_1 Admin

Attendance forSystems TestFollowing

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Friday 9 September5 days ago

Worker	Status	Booked	Start	Stop
11am				
<div><div></div>IW</div> Ian Wright	In progress	06:00	08:47	Stop

Wednesday 14 SeptemberToday

Worker	Status	Booked	Start	Stop
3pm				
<div><div></div>GX</div> Granit Xhaka	In progress	06:00	08:47	Stop
4pm				
<div><div></div>BS</div> Bukayo Saka	In progress	10:00	10:00	Stop

Now we can stop the clock by clicking either 'Stop shift' or 'Stop for night out'.

Click on 'Stop Shift'.

Where To Stop The Clock For A Worker?

Stop the timer

T1

Test 11031

Booked: 06:00 (Fri) Started: 11:21 (Mon) Duration: 1 min

Stop time 11:22:31 - [Edit](#)

Unplanned breaks mins

⚠ The shift duration is under the daily guarantee (8h 30m).

Do you want to grant the daily guarantee? ☐ yes ☒ no

Expenses

Please select..

Description...

£ Gross

☐ VAT applies

+

🗑

Were there any issues with the shift? ☐ yes ☒ no

Is the worker starting a night out? ☐ yes ☒ no

Cancel

Stop timer

You can edit the stop date and time by clicking on 'Edit'.

Add in any unplanned breaks into this section.

If the worker is guaranteed hours select 'yes' here.

From this section you can also add any expenses.

You can choose yes or no here if there were any issues or if the worker is starting a night out. See the next slide for what appears if you select yes.

Where To Stop The Clock For A Worker?

The screenshot shows the 'Stop the timer' interface for a worker named 'Test 11031'. The interface includes fields for 'Booked: 06:00 (Fri)', 'Started: 11:21 (Mon)', and 'Duration: 1 min'. The 'Stop time' is set to '11:22:31' with an 'Edit' link. There is a field for 'Unplanned breaks' in minutes. A warning message states: 'The shift duration is under the daily guarantee (8h 30m). Do you want to grant the daily guarantee?' with 'yes' and 'no' radio buttons. Below this is an 'Expenses' section with a dropdown menu, a 'Description...' field, and currency options (£, Gross, VAT). At the bottom, there are two questions: 'Were there any issues with the shift?' and 'Is the worker starting a night out?', both with 'yes' and 'no' radio buttons. A 'Cancel' button and a 'Stop timer' button are at the bottom right. A red box highlights the 'Stop timer' button, and a red arrow points to it from the text 'Once you are happy that all the details are correct, click \'Stop timer\'.' Another red box highlights the 'Were there any issues with the shift?' question and its options, with a red arrow pointing to it from the text 'If you choose yes for both questions, you will see the below box appear where you will need to add additional details.' A third red box highlights the 'Description...' field, with a red arrow pointing to it from the text 'Please describe the issue'.

Stop the timer

T1 Test 11031

Booked: 06:00 (Fri) Started: 11:21 (Mon) Duration: 1 min

Stop time 11:22:31 - [Edit](#)

Unplanned breaks mins

⚠ The shift duration is under the daily guarantee (8h 30m).
Do you want to grant the daily guarantee? ☐ yes ☒ no

Expenses

Please select.. Description... £ Gross ☐ VAT

Were there any issues with the shift? ☐ yes ☒ no

Is the worker starting a night out? ☐ yes ☒ no

Cancel [Stop timer](#)

If you choose yes for both questions, you will see the below box appear where you will need to add additional details.

Were there any issues with the shift? ☒ yes ☐ no

What kind of issue? Accident [Cancel](#)

Please describe the issue

Was it the worker's fault? ☐ yes ☒ no

+ [Add another issue](#)

Is the worker starting a night out? ☒ yes ☐ no

Second shift start time 20:32 (Mon) - [Edit](#)

Once you are happy that all the details are correct, click 'Stop timer'.

What It Shows When You Have Added The Stop Time?

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

AA Agency_1 Admin

Attendance for

Systems Test

Following

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Friday 9 September

5 days ago

Worker	Status	Booked	Start	Stop
11am				
<div>IW</div> Ian Wright	Complete	04:00	04:00	10:23

Wednesday 14 September

Today

Worker	Status	Booked	Start	Stop
3pm				
<div>GX</div> Granit Xhaka	In progress	06:00	08:47	Stop
4pm				
<div>BS</div> Bukayo Saka	In progress	10:00	10:00	Stop

When you have added the stop time you will see the status change to 'Complete'.

How Do I Amend The Time?

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

AA Agency_1 Admin

Attendance for

Systems Test

Following

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Friday 9 September

5 days ago

Worker	Status	Booked	Start	Stop
11am				
IW Ian Wright	Complete	04:00	04:00	10:47

Reset the stop time

Wednesday 14 September

Today

Worker	Status	Booked	Start	Stop
3pm				
GX Granit Xhaka	In progress	06:00	08:47	Stop
4pm				
BS Bukayo Saka	In progress	10:00	10:00	Stop

To amend the time, click on the 'x' to open the page.

Where To Amend The Clock?

Change of stop time

Current time

Tue 6 Jul 10:47

New date

Tue 6 Jul

New stop time

10:47

hh:mm

Why the time has changed

Please select...

Message

Message to worker (optional)

⚠ The shift duration is under the daily guarantee (8h 30m).

Do you want to grant the daily guarantee?

☐ yes ☒ no

Cancel

Save shift details

Enter in the new time, why the time has changed and a message if applicable.

If the worker is guaranteed hours click 'yes' and save the shift details.

Save shift details

Cancel

Save shift details

Where To Restart The Clock?

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

AA Agency_1 Admin

Attendance forSystems TestFollowing

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Friday 9 September5 days ago

Worker	Status	Booked	Start	Stop
11am				
<div><div></div>IW</div> Ian Wright	In progress	06:00	08:47	Stop

Wednesday 14 SeptemberToday

Worker	Status	Booked	Start	Stop
3pm				
<div><div></div>GX</div> Granit Xhaka	In progress	06:00	08:47	Stop
4pm				
<div><div></div>BS</div> Bukayo Saka	In progress	10:00	10:00	Stop

You can also rest the clock if required by clicking on the start time. This will bring up an 'x'.

Click on the 'x' to open the page.

Where To Reset Shift Stop Timer?

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

AA Agency_1 Admin

Attendance forSystems TestFollowing

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Friday 9 September5 days ago

Worker	Status	Booked	Start	Stop
11am				
<div>IW</div> Ian Wright	In progress	06:00	08:47	Stop

Wednesday 14 :

Worker	Status	Booked	Start	Stop
3pm				
<div>GX</div> Granit X				Stop
4pm				
<div>BS</div> Bukayo Saka	In progress	10:00	10:00	Stop

Reset shift stop timer

This will reset the stop timer of this shift.
Are you sure you want to do this?

No, cancelYes, reset

Next click on the 'Yes, reset' button to continue.

Yes, reset

How To View And Add Guaranteed Hours?

Stop the timer

TA

Test7689A A

Booked: 04:00 (Tue) Started: 04:00 Duration: 6h 29m

Stop time 10:29:34 - [Edit](#)

Unplanned breaks mins

⚠

The shift duration is under the daily guarantee (8h 30m).

Do you want to grant the daily guarantee? ☒ yes ☐ no

Expenses

Please select..

Description...

£ Gross

☐ VAT applies

+

🗑

Were there any issues with the shift? ☐ yes ☒ no

Is the worker starting a night out? ☐ yes ☒ no

Cancel

Stop timer

If your worker is guaranteed hours, then you will need to click on 'yes' to guarantee the payment is correct and then click on 'Stop timer'.

How To View Once Completed?

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

AAAgency_1 Admin

Attendance forSystems TestFollowing

September 2022

MO	TU	WE	TH	FR	SA	SU
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Select today

Friday 9 September5 days ago

Worker	Status	Booked	Start	Stop
11am				
IW Ian Wright	Complete	04:00	04:00	10:47

Wednesday 14 SeptemberToday

Worker	Status	Booked	Start	Stop
3pm				
GX Granit Xhaka	Complete	04:00	04:00	10:24
4pm				
BS Bukayo Saka	Complete	04:00	04:00	10:24

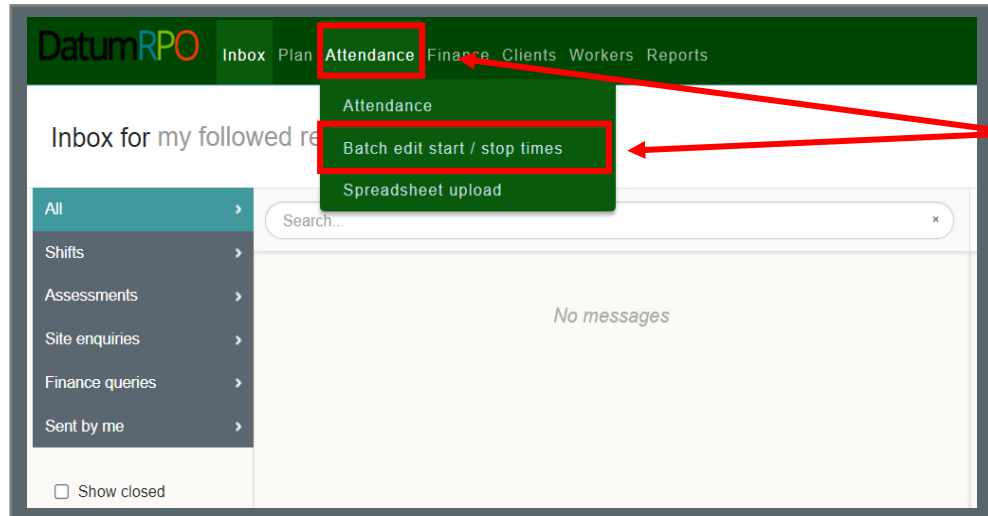
You can now see the workers are all completed.

BATCH EDIT START / STOP TIMES

AMEND TIME ON BATCH EDIT SHIFTS

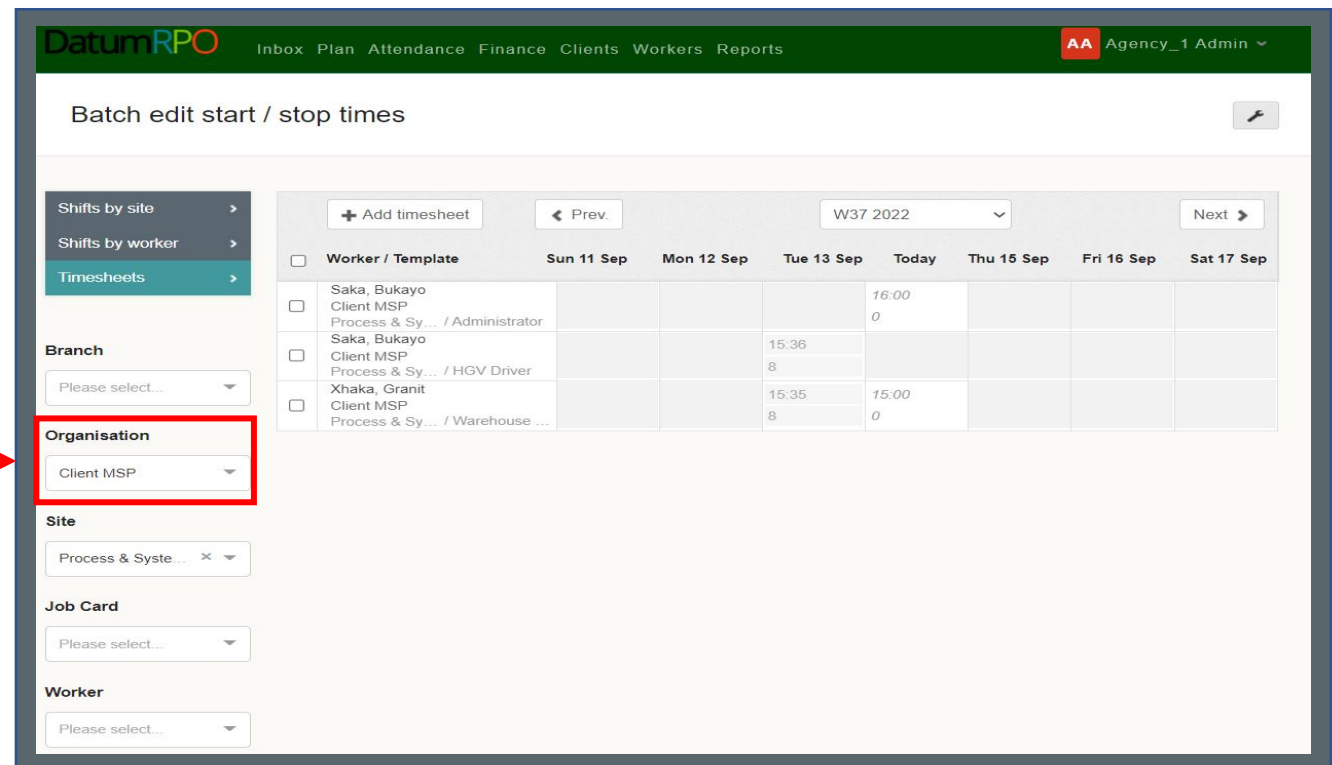
Where To Find Batch Edit Shifts?

This process happens after the shift has been completed. You can Batch Edit or Stop times (please refer to Start Stop times how to do guide on this process.)



Go to Attendance>Batch edit start/stop times.

Next go to Organisation to search for your Client.



Where To Find Your Organisation, Site and Workers?

DatumRPO

Batch edit start /

Shifts by site >
Shifts by worker >
Timesheets >

Branch
Please select...

Organisation
Client MSP
Agency_1
Argos
Client MSP

Job Card
Please select...

Worker
Please select...

Once you have found your client add.

Then search for your site and add.

DatumRPO

Batch edit start /

Shifts by site >
Shifts by worker >
Timesheets >

Branch
Please select...

Organisation
Client MSP

Site
Process & Syste... x
Client Nottingham Warehouse
Home Delivery - Croydon
Systems Test

Site
Site 4

If required, you can also filter by Job Card and Worker.

DatumRPO

Batch edit start / st

Shifts by site >
Shifts by worker >
Timesheets >

Branch
Please select...

Organisation
Client MSP

Site
Process & Syste... x

Job Card
Please select...

Worker
Please select...

How To Amend Time?

Go to the day you would like to amend.

DatumRPO | Inbox | Plan | Attendance | Finance | Clients | Workers | Reports | AA | Agency_1 Admin

Batch edit start / stop times

Shifts by site > | Shifts by worker > | Timesheets >

Branch: Please select... | Organisation: Client MSP | Site: Process & Syste... | Job Card: Please select... | Worker: Please select...

+ Add timesheet | Prev. | W37 2022 | Next >

Worker / Template	Sun 11 Sep	Mon 12 Sep	Tue 13 Sep	Today	Thu 15 Sep	Fri 16 Sep	Sat 17 Sep
<input type="checkbox"/> Saka, Bukayo Client MSP Process & Sy... / Administrator				16:00 0			
<input type="checkbox"/> Saka, Bukayo Client MSP Process & Sy... / HGV Driver			15:36 8				
<input type="checkbox"/> Xhaka, Granit Client MSP Process & Sy... / Warehouse ...			15:35 8	15:00 0	Create shift		

06:00
15:00

Save changes (1)

It is easy to amend the time if the workers shift hasn't been submitted.

Click on the time and amend.

Once amended then click save.

How To Add Finish Time?

The next part is to add the finish time or hours.

We are going to start with finish times and input the end time.

You can see we have already processed the finish time.

Add your finish time working on a 24-hour clock.

Once added click on the [Save changes \(2\)](#) button.

A notification will pop up if you have a student working with restricted hours.

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >


Workers marked with this symbol each hold a student visa and their hours are restricted during term time, please ensure that they do not exceed their working hours restrictions

+ Add timesheet < Prev. W17 / 2021 Next >

Worker / Template	Sun 25th	Mon 26th	Tue 27th	Wed 28th	Today	Fri 30th	Sat 1st
<input type="checkbox"/> Client MSP Process & Sy... / Administrator	14:00 22:00						
<input type="checkbox"/> Client MSP Process & Sy... / Administrator	05:00 11:30						
<input type="checkbox"/> Client MSP Process & Sy... / Administrator	05:00 14:00			05:00 14:00	05:00		
<input type="checkbox"/> Client MSP Process & Sy... / Administrator	14:05 22:00	14:00 22:05	14:00 21:00	14:00 21:30	15:00 14:00	14:00	
<input type="checkbox"/> Client MSP Process & Sy... / Administrator		05:00 14:00	05:00 14:00	05:00 14:00	05:00		

Workers marked with this symbol each hold a student visa and their hours are restricted during term time, please ensure that they do not exceed their working hours restrictions

How To Add Finish Hours?

This is the same process as before; however, we are going to change the view preferences from Stop time to Duration time. To do this click on the  to change and save.

DatumRPO

InboxPlanAttendanceFinanceClientsWorkersReports

Batch edit start / stop times

Shifts by site >

Shifts by worker >

Timesheets >

Branch

Please select...

Organisation

Client MSP

Site

+ Add timesheet

< Prev.

W1

<input type="checkbox"/> Worker / Template	Sun 25th	Mon 26th	Tue 27th
<input type="checkbox"/> Client MSP Process & Sy... / Administrator ..		06:30 12	06:30 12
<input type="checkbox"/> Client MSP Process & Sy... / Administrator ..	18:30 12		
<input type="checkbox"/> Client MSP Process & Sy... / Administrator ..	18:30 12	18:30 12	
<input type="checkbox"/> Client MSP Process & Sy... / Administrator ..	06:30 12	06:30 12	
<input type="checkbox"/> Client MSP Process & Sy... / Administrator ..			18:30 0

View preferences

Edit mode

☐ Stop time

☒ Duration in hours

Cancel


Save

Add your finish time working on a 24-hour clock.
This can also be done on a 100 decimal.

18:30

18:30

12

Once added click on the  button.

CANCEL A SHIFT THROUGH BATCH EDIT

How To Open The Shift?

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >

Branch
Select...

Organisation
TestClientCixhhsalaon


Site
TestSiteRrol670

Job Card
Select...

Worker
Select...

+ Add timesheet Prev. W27 / 2021 Next

Worker / Template	Sun 4th	Mon 5th	Today	Wed 7th	Thu 8th	Fri 9th	Sat 10th
<input type="checkbox"/> A, Test7689a TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...		12:47	04:00 10:47	07:00	06:00		
<input type="checkbox"/> A, Test7689sharmaa TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:24		06:00		
<input type="checkbox"/> A, Test7689veenaa TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:24		06:00		
<input type="checkbox"/> A, Test 7689 Vs1 A TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:24		06:00		
<input type="checkbox"/> Adams, Test TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:24		06:00		
<input type="checkbox"/> Akkfrizuhgz, Test TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00		
<input type="checkbox"/> Aqlrfbyzfq, Test TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00		
<input type="checkbox"/> B, Test7689b TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00		
<input type="checkbox"/> B, Test7689sharmab TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00		
<input type="checkbox"/> B, Test7689veenab TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00		
<input type="checkbox"/> B, Test 7689 Vs2 B TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:29		06:00		
<input type="checkbox"/> Kxjkkynmi, Test TestClientCixhhsalaon TestSiteRrol670 / sJobCardTe...			04:00 10:29		06:00		

Click on
the  to open
the shift.

How To Open The Shift Details?

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >

Branch
Select...

Organisation
TestClientCixhslaon

Site
TestSiteRrol670

Job Card
Select...

Worker
Select...

+ Add timesheet < Prev. W27 / 2021 Next >

Worker / Template Sun 4th Mon 5th Today Wed 7th Thu 8th Fri 9th Sat 10th

A, Test7689a's shift

Client	TestClientCixhslaon
Site	TestSiteRrol670
Job card	sJobCardTestEbda406
Planned start time	Monday 5th Jul, 06:00
Actual start time	Tuesday 6th Jul, 12:47
Stop time	Not defined yet
Shift details	

Cancel

TestClientCixhslaon
TestSiteRrol670 / sJobCardTe...
B, Test7689sharmab
TestClientCixhslaon
TestSiteRrol670 / sJobCardTe...
B, Test7689veenab
TestClientCixhslaon
TestSiteRrol670 / sJobCardTe...
B, Test 7689 Vs2 B
TestClientCixhslaon
TestSiteRrol670 / sJobCardTe...
Kxjkkxnm, Test
TestClientCixhslaon
TestSiteRrol670 / sJobCardTe...

Click here to open the shift details.

How To Cancel The Shift?

Tue 13 Sep at 11:00 Yesterday Cancel shift

Organisation	ARGOS Home Delivery DHL
Site	Argos Aberdeen Warehouse - Attendance Finance
Job card	Packer - Change
Rate type	PAYE
Status	Not published - Publish
Rates	Charge: £12.00 per hour Pay: £10.00

Click on cancel shift.

Add in the reason why?

Once complete click 'Yes cancel the shift'.

TA

Tue 6 Jul, 04:00 Today Cancel shift

Organisation TestClientCixhhslaon

Mobile
+44 (0) 7570225222 ✕

[Test7689AA](#)

Cancel the shift

Do you really want to cancel this shift?

Why? Client cancelled

Message Machine broken down

No, dismiss Yes, cancel this shift

How To View The Cancelled Shift?

DatumRPO | [Inbox](#) | [Plan](#) | **Attendance** | [Finance](#) | [Clients](#) | [Workers](#) | [Reports](#) | **AA** Agency_1 Admin

[Edit timesheets](#) | **Shift information**

TA
[Test7689AA](#)
Mobile: +44 (0) 7570225222 ✕

Tue 6 Jul, 04:00 **Today**

Organisation	TestClientCixhhsa
Site	TestSiteRrol670 - Post shifts Attendance
Job card	slJobCardTestEbda406
Rate type	PAYE: Pre-parity
Status	Cancelled
Charge rate	£13.00 per hour
Pay rate	£11.00 per hour (PAYE, Pre-parity)

	Start	Stop	Duration
Planned	04:00		
Actual			
Next shift	19:23		View this shift

[+ Raise a query](#)

Messages about this shift [Contact the worker](#)

MSP Admin cancelled this shift Today 16:13

TH Reason: Client cancelled
Machine broken down

You will now see the cancelled shift has been removed and a comment added to the cancelled shift information.

Once complete click on Edit timesheets button to go back to the Batch Edit page.

How To View Batch Edit Once Completed?

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >

Branch
Select...

Organisation
TestClientCixhhslaon

Site
TestSiteRrol670

Job Card
Select...

Worker
Select...

+ Add timesheet Prev. W27 / 2021 Next

Worker / Template	Sun 4th	Mon 5th	Today	Wed 7th	Thu 8th	Fri 9th	Sat 10th
<input type="checkbox"/> A, Test7689a TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...		12:47 ---			06:00 ---		
<input type="checkbox"/> A, Test7689sharmaa TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:24		06:00 ---		
<input type="checkbox"/> A, Test7689veenaa TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:24		06:00 ---		
<input type="checkbox"/> A, Test 7689 Vs1 A TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:24		06:00 ---		
<input type="checkbox"/> Adams, Test TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:24		06:00 ---		
<input type="checkbox"/> Akkfrizuhgz, Test TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00 ---		
<input type="checkbox"/> Aqlrfbyzfzq, Test TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00 ---		
<input type="checkbox"/> B, Test7689b TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00 ---		
<input type="checkbox"/> B, Test7689sharmab TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00 ---		
<input type="checkbox"/> B, Test7689veenab TestClientCixhhslaon TestSiteRrol670 / sJobCardTe...			04:00 10:25		06:00 ---		

The shift has now been removed.

Repeat the process if you are deallocating a worker from the list.
Only difference is reasons why.

HOW TO VIEW SHIFT DETAILS

How To Open Shift Details?

Next click on the **1** to open the shift details.

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >

Branch
Select...

Organisation
TestClientCixhslaon

Site
TestSiteRrol670

Job Card
Select...

Worker
Select...

+ Add timesheet Prev. W27 / 2021 Next

Worker / Template	Sun 4th	Mon 5th	Tue 6th	Wed 7th	Thu 8th	Fri 9th	Sat 10th
<input type="checkbox"/> A, Test7689a TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...		12:47 13:00			13:30 13:34		
<input type="checkbox"/> A, Test7689sharmaa TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...			04:00 10:24		13:10 13:35		
<input type="checkbox"/> A, Test7689veenaa TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...			04:00 12:00		13:50 21:50		
<input type="checkbox"/> A, Test 7689 Vs1 A TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...			04:00 10:24		13:50 21:50		
<input type="checkbox"/> Adams, Test TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...		06:00 14:00	04:00 12:30		13:50 22:00		
<input type="checkbox"/> Akkriruhgz, Test TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...		07:00 15:00	04:00 10:25		13:52 21:52		
<input type="checkbox"/> Aqlrfbyzfq, Test TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...			04:00 10:25		13:52 21:52		
<input type="checkbox"/> B, Test7689b TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...			04:00 10:25		13:34 13:52		
<input type="checkbox"/> B, Test7689sharmab TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...			04:00 10:25		13:30 13:45		
<input type="checkbox"/> B, Test7689veenab TestClientCixhslaon TestSiteRrol670 / sIJobCardTe...			04:00 10:25		13:34 13:53		

Open shift preview

How To Open Shift Details?

Next click on here to open the shift details.

The screenshot displays the DatumRPO interface. On the left, there is a sidebar with navigation options: 'Shifts by site', 'Shifts by worker', and 'Timesheets'. Below these are filters for 'Branch', 'Organisation' (set to 'TestClientCixhhsalaon'), 'Site' (set to 'TestSiteRrol670'), and 'Job Card'. The main area shows a calendar view for 'W27 / 2021' with columns for days from Sunday to Saturday. A modal window titled 'A, Test7689sharmaa's shift' is open in the center. It contains a table with the following details:

Client	TestClientCixhhsalaon
Site	TestSiteRrol670
Job card	slJobCardTestEbda406
Planned start time	Tuesday 6th Jul, 04:00
Actual start time	Tuesday 6th Jul, 04:00
Stop time	Tuesday 6th Jul, 10:24

Below the table, there is a link labeled 'Shift details' which is highlighted with a red box. A red arrow points from the text 'Next click on here to open the shift details.' to this link. A 'Cancel' button is located at the bottom right of the modal.

How To View Shift Details?

[Edit timesheets](#) Shift information

TA

[Test7689SharmaAA](#)

Mobile
+44 (0) 7971846611 ✕

Tue 6 Jul, 04:00

Cancel shift

Organisation	TestClientCixhhslaon		
Site	TestSiteRrol670 - Post shifts Attendance Finance		
Job card	slJobCardTestEbda406 - Change		
Rate type	PAYE: Pre-parity		
Daily guarantee	8h 30m		
Status	Complete → Unsubmitted		
Charge rate	£13.00 per hour		
Pay rate	£11.00 per hour (PAYE, Pre-parity)		

	Start	Stop	Duration
Planned	04:00		
Actual	04:00	10:24	6h 25m
Unplanned breaks			-
Daily guarantee (8h 30m)			Grant 👍
Shift total			6h 25m

You have now opened shift details and are able to view job card information, start and finish time, hours worked, Adjustments, Expenses and are able to query a shift from here.

It also shows you who booked or cancelled a worker.

HOW TO VIEW SHIFT BY SITE

Where To Go To Open Shifts By Site?

Next click on 'Shifts by site'.

Batch edit start / stop times

Shifts by site

Shifts by worker

Timesheets

+ Add timesheet

Prev.

W27 / 2021

Next

Worker / Template	Sun 4th	Mon 5th	Tue 6th	Wed 7th	Thu 8th	Fri 9th	Sat 10th
<input type="checkbox"/> A, Test7689a		12:47			13:30		
<input type="checkbox"/> TestClientCixhhsaon		13:09			13:34		
<input type="checkbox"/> TestSiteRrol670 / slJobCardTe...							

How To Only Show Shifts Without Start Times?

Search for your site in the dropdown box.

Batch edit start / stop times

All the times have been saved properly. x

Shifts by site >
Shifts by worker >
Timesheets >

Selected site
TestClientCixhhsiaon / TestSite...

Summary

17 shifts without start times
Only show these shifts

20 shifts without stop times
Only show these shifts

Set default start / stop times
Stop times will be based on the job card's typical shift lengthsamp.
Add start / stop times

Showing 22 shifts

Monday 28th June / TestSiteRrol670

Worker	Booked
TestAdams	Mon 28 - 06:00

Tuesday 6th July / TestSiteRrol670

Worker	Booked
Test7689sharmaa.A	Tue 06 - 04:00

Monday 12th July / TestSiteRrol670

Worker	Booked
Test7689a.A	Mon 12 - 06:00

You can view the workers who have not got start times.

Click on only show these shifts.

Only show these shifts

You can manually add the start and stop times or add all by clicking on add start/stop times.

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >

Selected site
TestClientCixhhsiaon / TestSite...

Summary

17 shifts without start times
Showing only these shifts

20 shifts without stop times
Only show these shifts

Set default start / stop times
Stop times will be based on the job card's typical shift lengthsamp.
Add start / stop times

Showing 17 shifts without start times

Tuesday 13th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689veenaa.A	Tue 13 - 06:00		
Test7689 Vs1.A.A	Tue 13 - 06:00		
TestAdams	Tue 13 - 06:00		
Test Akkfrzuhtz	Tue 13 - 06:00		
Test Anirfhyzfg	Tue 13 - 06:00		
Test7689b.B	Tue 13 - 06:00		
Test7689veenab.B	Tue 13 - 06:00		
Test7689 Vs2.B.B	Tue 13 - 06:00		
Test Kykkyxnm	Tue 13 - 06:00		

How To Only Show Shifts Without Stop Times?

Batch edit start / stop times

All the times have been saved properly. x

Shifts by site >
Shifts by worker >
Timesheets >

Summary

17 shifts without start times
Only show these shifts

20 shifts without stop times
Only show these shifts

Set default start / stop times
Stop times will be based on the job card's typical shift length.

Add start / stop times

Showing 22 shifts

Monday 28th June / TestSiteRrol670

Worker	Booked
Test Adams	Mon 28 - 06:00

Tuesday 6th July / TestSiteRrol670

Worker	Booked
Test7689sharmaa A	Tue 06 - 04:00

Monday 12th July / TestSiteRrol670

Worker	Booked
Test7689a A	Mon 12 - 06:00

You can view the workers who have not got stop times.

Click on only show these shifts.

Only show these shifts

You can manually add the start and stop times or add all by clicking on add start/stop times.

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >

Summary

17 shifts without start times
Only show these shifts

20 shifts without stop times
Showing only these shifts
Remove filter

Set default start / stop times
Stop times will be based on the job card's typical shift length.

Showing 20 shifts without stop times

Monday 12th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689a A	Mon 12 - 06:00	06:00	

Tuesday 13th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689a A	Tue 13 - 04:00	06:00	
Test7689sharmaa A	Tue 13 - 06:00	06:00	
Test7689veena A	Tue 13 - 06:00		
Test 7689 Vst1 AA	Tue 13 - 06:00		
Test Adams	Tue 13 - 06:00		
Test Akkfrubgz	Tue 13 - 06:00		

How To Add Start/Stop Times?

Batch edit start / stop times

All the times have been saved properly. x

Shifts by site >

Shifts by worker >

Timesheets >

Selected site

TestClientCixhslaon / TestSite...

Summary

17 shifts
without start times

Only show these shifts

20 shifts
without stop times

Only show these shifts

Set default start / stop times
Stop times will be based on the job card's typical shift lengthsamp.

Add start / stop times

Showing 22 shifts

Monday 28th June / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
TestAdams	Mon 28 - 06:00	06:00	14:00

Tuesday 6th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689sharmaa A	Tue 06 - 04:00	04:00	14:00

Monday 12th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689a A	Mon 12 - 06:00	06:00	

Now we have viewed who has start or stop times we can now add those who haven't.

Click on Add Start/Stop Times.

How To Check And Complete Start/Stop Times?

Monday 12th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689a A	Mon 12 - 06:00	06:00	14:00

Tuesday 13th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689a A	Tue 13 - 04:00	06:00	14:00
Test7689sharmaa A	Tue 13 - 06:00	06:00	14:00
Test7689veenaa A	Tue 13 - 06:00	06:00	14:00
Test 7689 Vs1 A A	Tue 13 - 06:00	06:00	14:00
Test Adams	Tue 13 - 06:00	06:00	14:00
Test Akkrzuhgz	Tue 13 - 06:00	06:00	14:00
Test Aqlrfbyzfq	Tue 13 - 06:00	06:00	14:00
Test7689b B	Tue 13 - 06:00	06:00	14:00
Test7689veenab B	Tue 13 - 06:00	06:00	14:00
Test 7689 Vs2 B B	Tue 13 - 06:00	06:00	14:00
Test Kxjkkynmi	Tue 13 - 06:00	06:00	14:00

Wednesday 14th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689a A	Wed 14 - 06:00	06:00	14:00
Test7689sharmaa A	Wed 14 - 06:00	06:00	14:00

This function will input the start/stop times for you.

Next click on save shift times.

You can either amend times now or you can save and go back and amend.

It is quicker to amend before saving.

Save shift times

How View Complete Start/Stop Times?

Batch edit start / stop times

Shifts by site

Shifts by worker

Timesheets

Summary

0 shifts without start times

0 shifts without stop times

Set default start / stop times
Stop times will be based on the job card's typical shift length samp.

Only show these shifts

Only show these shifts

Add start / stop times

Selected site

TestClientCixhhsiaon / TestSite...

Showing 22 shifts

Monday 28th June / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test Adams	Mon 28 - 06:00	06:00	14:00

Tuesday 6th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689sharmaa A	Tue 06 - 04:00	04:00	14:00

Monday 12th July / TestSiteRrol670

Worker	Booked	Actual start	Actual stop
Test7689a A	Mon 12 - 06:00	06:00	14:00

You can now see the start and stop times are greyed out and it is now showing no shifts without start or stop times.

You have now completed how to view shifts by site and complete start/stop times!

HOW TO VIEW SHIFT BY WORKER

Where To Go To Open Shifts By Worker?

Next click on 'Shifts by worker'.

The screenshot shows the DatumRPO interface. At the top, it says "Batch edit start / stop times" with a wrench icon. On the left, there is a sidebar menu with three options: "Shifts by site", "Shifts by worker" (highlighted with a red box and a red arrow pointing to it), and "Timesheets". The main area contains a header with a "+ Add timesheet" button, a "Prev." button, a date selector showing "W27 / 2021", and a "Next" button. Below this is a table with columns for "Worker / Template", "Sun 4th", "Mon 5th", "Tue 6th", "Wed 7th", "Thu 8th", "Fri 9th", and "Sat 10th". The table has two rows of data. The first row shows "A, Test7689a" with times 12:47 and 13:30. The second row shows "TestClientCixhslaon" and "TestSiteRrol670 / slJobCardTe..." with times 13:09 and 13:34.

Worker / Template	Sun 4th	Mon 5th	Tue 6th	Wed 7th	Thu 8th	Fri 9th	Sat 10th
A, Test7689a		12:47			13:30		
TestClientCixhslaon TestSiteRrol670 / slJobCardTe...		13:09			13:34		

Where To Go To Select The Worker?

Next, search and select the worker you would like to view.

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >

Selected worker
Test Adams
Test Adams

Summary

0 shifts
without start times
Only show these shifts

0 shifts
without stop times
Only show these shifts

Set default start / stop times
Stop times will be based on the job card's typical shift lengthsamp.
Add start / stop times

Showing 3 shifts

W26 (w/c 28 Jun 2021) / Test Adams

Site	Booked	Actual start	Actual stop
TestSiteRrol670	Mon 28 - 06:00	06:00	14:00

W28 (w/c 12 Jul 2021) / Test Adams

Site	Booked	Actual start	Actual stop
TestSiteRrol670	Tue 13 - 06:00	06:00	14:00
TestSiteRrol670	Wed 14 - 06:00	06:00	14:00

How To Only Show Shifts Without Start Times?

You can view the shifts of the worker that don't have start times.

Batch edit start / stop times

Shifts by site >

Shifts by worker >

Timesheets >

Summary

0 shifts
without start times

Only show these shifts

2 shifts
without stop times

Only show these shifts

Set default start / stop times
Stop times will be based on the job card's typical shift length samp.

Add start / stop times

Selected worker

Test Adams

Showing 2 shifts

W28 (w/c 12 Jul 2021) / Test Adams

Site	Booked	Actual start	Actual stop
TestSiteRrol670	Tue 13 - 06:00	06:00	
TestSiteRrol670	Wed 14 - 06:00	06:00	

Click on only show these shifts.

You can manually add the start and stop times or add all by clicking on add start/stop times.

How To Only Show Shifts Without Stop Times?

Batch edit start / stop times

Shifts by site >
Shifts by worker >
Timesheets >

Selected worker
Test Adams

Summary

0 shifts without start times
Only show these shifts

2 shifts without stop times
Only show these shifts

Set default start / stop times
Stop times will be based on the job card's typical shift length samp.
Add start / stop times

Showing 2 shifts

W28 (w/c 12 Jul 2021) / Test Adams

Site	Booked	Actual start	Actual stop
TestSiteRrol670	Tue 13 - 06:00	06:00	
TestSiteRrol670	Wed 14 - 06:00	06:00	

You can view the shifts of the worker that don't have stop times.

Click on only show these shifts.

Only show these shifts

You can manually add the start and stop times or add all by clicking on add start/stop times.

How To Add Start/Stop Times?

Batch edit start / stop times

Shifts by site >

Shifts by worker >

Timesheets >

Selected worker

Test Adams

Summary

0 shifts
without start times

Only show these shifts

2 shifts
without stop times

Only show these shifts

Set default start / stop times
Stop times will be based on the job card's typical shift length samp.

Add start / stop times

Showing 2 shifts

W28 (w/c 12 Jul 2021) / Test Adams

Site	Booked	Actual start	Actual stop
TestSiteRrol670	Tue 13 - 06:00	06:00	<input type="text"/>
TestSiteRrol670	Wed 14 - 06:00	06:00	<input type="text"/>

Now we have viewed the shifts that don't have start or stop times we can now add those in.

Click on Add Start/Stop Times.
This will add in both start and finish times which is taken from the job cards.

How To Check And Complete Start/Stop Times?

Batch edit start / stop times Clear unsaved start / stop times

Shifts by site

Shifts by worker

Timesheets

Summary

0 shifts
without start times

2 shifts
without stop times

Set default start / stop times
Stop times will be based on the job card's typical shift lengthsamp.

Only show these shifts

Only show these shifts

Add start / stop times

Selected worker
Test Adams

Showing 2 shifts

W28 (w/c 12 Jul 2021) / Test Adams

Site	Booked	Actual start	Actual stop
TestSiteRoi670	Tue 13 - 06:00	06:00	14:00
TestSiteRoi670	Wed 14 - 06:00	06:00	14:00

Save shift times

This function will input the start/stop times for you.

Next click on save shift times.

You can either amend times now or you can save and go back and amend.

It is quicker to amend before saving.

How View Complete Start/Stop Times?

Batch edit start / stop times

All the times have been saved properly. x

Shifts by site >

Shifts by worker >

Timesheets >

Selected worker

Test Adams

Summary

0 shifts without start times

Only show these shifts

0 shifts without stop times

Only show these shifts

Set default start / stop times

Stop times will be based on the job card's typical shift lengthsamp.

Add start / stop times

Showing 2 shifts

W28 (w/c 12 Jul 2021) / Test Adams

Site	Booked	Actual start	Actual stop
TestSiteRrol670	Tue 13 - 06:00	06:00	14:00
TestSiteRrol670	Wed 14 - 06:00	06:00	14:00

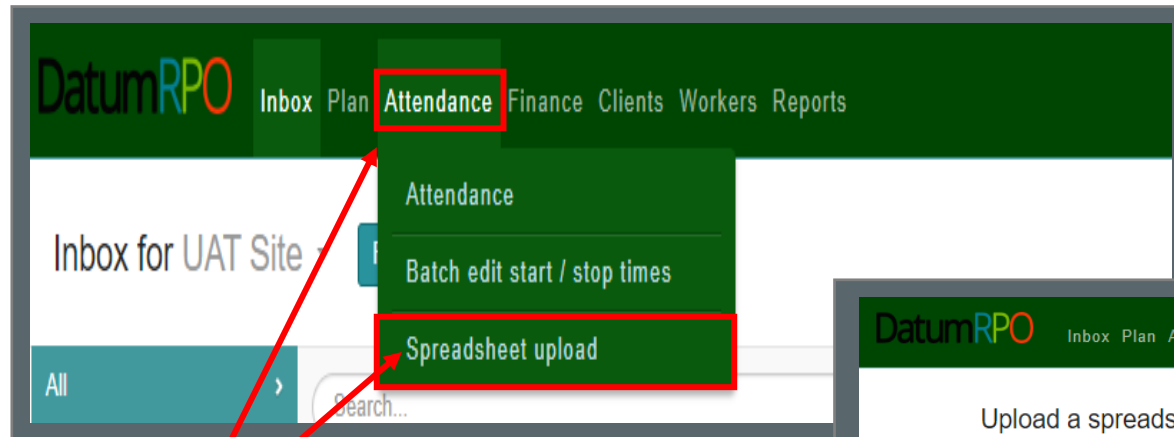
You will also notice at the top of the page when you save it will advise if it has saved properly

You can now see the start and stop times are greyed out and it is now showing no shifts without start or stop times.

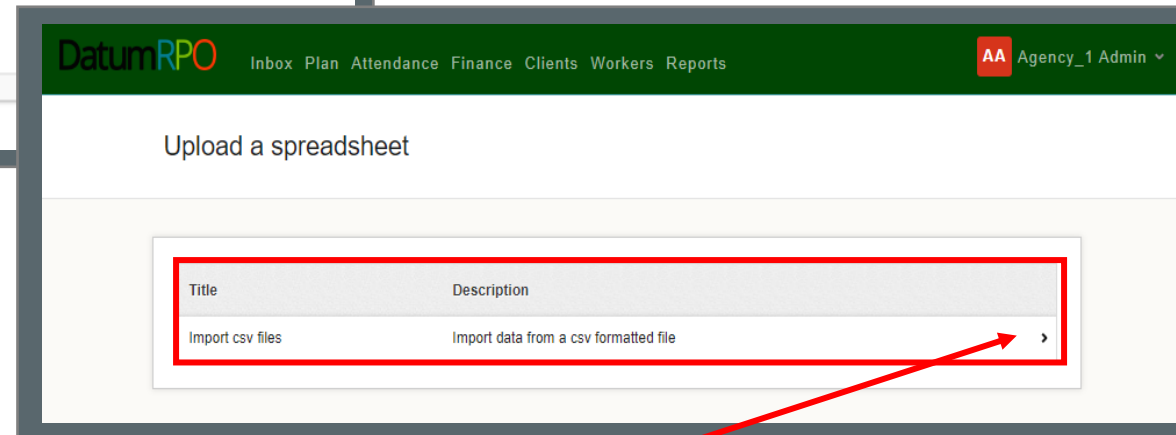
SPREADSHEET UPLOAD

HOW TO DOWNLOAD YOUR WORKERS THROUGH A CSV UPLOAD

How Download Workers Into Universe?



Go To Attendance>Spreadsheet Upload



Next, click on Import CSV Files and the arrow ➤

How Download Workers Into Universe?

CSV import:Workers

Steps

1. Choose and upload a file
2. Choose an agency
3. Fix any errors in the file prompted by the hints (re-upload if required)
4. Review the data to be created / updated

Agency

Please select... ▼

Upload a file

Download Template (CSV)

Click on the download Template to upload all your workers information. Once you download the template file out the information as required

How I Fill Out The Template?

Below shows the mandatory fields that need to be completed. Please ensure you complete the highlighted section to ensure our system doesn't contact your workers

First name	Surname	Email	NI number	Is driver role	Preferred site ID	Employment status	Skip email confirmation until	Enable email comms	Enable SMS comms
Upload	Test6	upload@test6.com	NA233333A	N	6.01E+08	PAYE	20/12/2022	N	N
Upload	Test7	upload@test7.com	SS663526C	N	6.01E+08	PAYE		Y	Y
Upload	Test8	omeradm2016@gmail.com	NA233335A	N	6.01E+08	PAYE		Y	N

First Name

Last Name

Email Address

NI Number

Is driver role (Y or N)

Preferred Site ID (the ID of a site the worker will work at, which can be found in the client page)

Employment Type (PAYE, LTD_Company, Umbrella)

Enable email comms = N

Enable SMS comms = N

How I Fill Out The Template?

You can also populate the 'Skip email confirmation until' column which will mean they don't need to manually skip the email to use the profile. They provide a date (e.g., 20/12/2022) and the email will be skipped until that point

If an email address or NI number exists anywhere in DatumRPO (not just that agency) the profile will not be created. You need to use a different email or NI number

If you don't **put N for email/SMS comms**, there is a risk that a worker will receive comms from the system.

Only a user for the agency can upload the workers for that agency. Eg Datum cannot upload for Bob's Recruitment and Bob's Recruitment cannot upload for Jeremy's Recruitment

Whilst the uploader only requires the details stated. The created profile cannot be linked to a job card until the following as been completed;

Mobile Number
Date of Birth
Nationality
Address

The personal and employment status validations must have been passed (by clicking the buttons at the bottom of the personal information page). For each profile you would need to manually validation (clicking those buttons) after the upload has happened

How Download Workers Into Universe?

File errors
7 out of 8 lines were processed, **1 lines were ignored**. Within the 1 ignored lines there were 1 errors found. (Line refers to the original file):

- Line 9: Missing value for column 'NI number'

Import conflicts
7 items have been extracted from the file. 4 can be created. Please review the details in the table below.

Status key

- issue** Conflicts blocking item creation
- caution** Conflicts not blocking item creation
- valid** No conflicts
- created** Item created successfully

Items processed from: worker_import_template (1).csv

☒ **Create 4 items**

	Worker ID	First name	Surname	Email	Date of birth	NI number	Licence	Status	
<input type="checkbox"/>	-	Paul	Allen	paul@mail.com	10-03-1976 00:00:00	JJ123457C	654654546	2 issues	>
<input checked="" type="checkbox"/>	-	Piotr	Zacharczuk	piotr@mail.com	14-07-2000 00:00:00	JJ123458C	-	valid	
<input checked="" type="checkbox"/>	-	Simon	Mann	mann@mail.com	13-08-1984 00:00:00	JJ123459C	-	valid	
<input checked="" type="checkbox"/>	-	Alfred	Rose	rose@mail.com	12-12-1964 00:00:00	JJ123455C	-	valid	
<input type="checkbox"/>	-	Marta	Kurdybelska	marta@mail.com	15-10-1988 00:00:00	JJ123454C	7897979797	2 issues	>
<input checked="" type="checkbox"/>	-	Karen	Corr	karen@mail.com	03-03-1974 00:00:00	JJ123453C	-	valid	

Status key

- issue** Conflicts blocking item creation
- caution** Conflicts not blocking item creation
- valid** No conflicts
- created** Item created successfully

Now we have downloaded the report we can now see Who has no conflicts and who has conflicts blocking items creation.

Any worker that is not valid will show as an issue and how many issues.

How Download Workers Into Universe?

Items processed from: worker_import_template (1).csv

☒ [Create 4 items](#) [Cancel and upload another file](#) [Clear results](#)

	Worker ID	First name	Surname	Email	Date of birth	NI number	Licence	Status
<input type="checkbox"/>	601899892 (E)	John	Smith	bob@mail.com	01-02-1984 00:00:00	JJ123456C	-	created
<input type="checkbox"/>	-	Paul	Allen	paul@mail.com	10-03-1976 00:00:00	JJ123457C	654654546	2 issues ▼

- Line 3: '26545' is not a valid company number
- Line 3: '80000' is not a valid VAT number

When you click on the arrow ➤ it will dropdown the reasons of the issue and also which line from the report it is from for you to be able to rectify. Once amend re upload the report.

How Download Workers Into Universe?

CSV import: Workers

8 out of 8 lines were processed successfully.
8 items have been extracted from the file.


Status key

- issue Conflicts blocking item creation
- caution Conflicts not blocking item creation
- valid No conflicts
- created Item created successfully

Items processed from: worker_import_template (1).csv

☒ Create 8 items

	Worker ID	First name	Surname	Email	Date of birth	NI number	Licence	Status
<input checked="" type="checkbox"/>	-	John	Smith	john@mail.com	02-02-1984 00:00:00	JJ123456C	-	valid
<input checked="" type="checkbox"/>	-	Paul	Allen	paul@mail.com	10-03-1976 00:00:00	JJ123457C	654654546	valid
<input checked="" type="checkbox"/>	-	Piotr	Zacharczuk	piotr@mail.com	14-07-2000 00:00:00	JJ123458C	-	valid
<input checked="" type="checkbox"/>	-	Simon	Mann	mann@mail.com	13-08-1984 00:00:00	JJ123459C	-	valid
<input checked="" type="checkbox"/>	-	Alfred	Rose	rose@mail.com	12-12-1964 00:00:00	JJ123455C	-	valid
<input checked="" type="checkbox"/>	-	Marta	Kurdybelska	marta@mail.com	15-10-1988 00:00:00	JJ123454C	7897979797	valid
<input checked="" type="checkbox"/>	-	Karen	Corr	karen@mail.com	03-03-1974 00:00:00	JJ123453C	-	valid

Once the upload has been completed again you will now see Valid  on the right hand side. You can now create 8 items.

How Download Workers Into Universe?

CSV import:Workers

8 out of 8 lines were processed successfully.
8 items have been extracted from the file.

Status key

- issue Conflicts blocking item creation
- caution Conflicts not blocking item creation
- valid No conflicts
- created Item created successfully

Items processed from: worker_import_template (1).csv

☒ Create 8 items Cancel and upload another file Clear results

	Worker ID	First name	Surname	Email	Date of birth	NI number	Licence	Status
<input checked="" type="checkbox"/>	-	John	Smith	john@mail.com	02-02-1984 00:00:00	JJ123456C	-	valid
<input checked="" type="checkbox"/>	-	Paul	Allen	paul@mail.com	10-03-1976 00:00:00	JJ123457C	654654546	valid
<input checked="" type="checkbox"/>	-	Piotr	Zacharczuk	piotr@mail.com	14-07-2000 00:00:00	JJ123458C	-	valid
<input checked="" type="checkbox"/>	-	Simon	Mann	mann@mail.com	13-08-1984 00:00:00	JJ123459C	-	valid
<input checked="" type="checkbox"/>	-	Alfred	Rose	rose@mail.com	12-12-1964 00:00:00	JJ123455C	-	valid
<input checked="" type="checkbox"/>	-	Marta	Kurdybelska	marta@mail.com	15-10-1988 00:00:00	JJ123454C	7897979797	valid
<input checked="" type="checkbox"/>	-	Karen	Corr	karen@mail.com	03-03-1974 00:00:00	JJ123453C	-	valid
<input checked="" type="checkbox"/>	-	Rosie	Park	rp@mail.com	05-11-1963 00:00:00	JJ123452C	-	valid

Next, click on Create 8 Items  and select all.

Top Tip

You can only create 50 at a time. Once you have created 50 select all again and repeat the process

How Download Workers Into Universe?

CSV import: Workers

8 out of 8 lines were processed successfully.

[Import conflicts](#)

8 items have been extracted from the file. can be created. Please review the details in the table below.

Status key:

- issue** Conflicts blocking item creation
- caution** Conflicts not blocking item creation
- valid** No conflicts
- created** Item created successfully

Items processed from: worker_import_template (1).csv

☒ No items selected [Cancel and upload another file](#) [Clear results](#)

	Worker ID	First name	Surname	Email	Date of birth	NI number	Licence	Status
<input type="checkbox"/>	601977886	John	Smith	john@mail.com	02-02-1984 00:00:00	JJ123456C	-	created
<input type="checkbox"/>	601977906	Paul	Allen	paul@mail.com	10-03-1976 00:00:00	JJ123457C	654654546	created
<input type="checkbox"/>	601977924	Piotr	Zacharczuk	piotr@mail.com	14-07-2000 00:00:00	JJ123458C	-	created
<input type="checkbox"/>	601977940	Simon	Mann	mann@mail.com	13-08-1984 00:00:00	JJ123459C	-	created
<input type="checkbox"/>	601977956	Alfred	Rose	rose@mail.com	12-12-1964 00:00:00	JJ123455C	-	created
<input type="checkbox"/>	601977972	Marta	Kurdybelska	marta@mail.com	15-10-1988 00:00:00	JJ123454C	7897979797	created
<input type="checkbox"/>	601977990	Karen	Corr	karen@mail.com	03-03-1974 00:00:00	JJ123453C	-	created

Once the system has created the items you will see conformation on the right side as created. [created](#)

Once completed search for your worker and double check the details.

FINANCE

TIMESHEETS

Where To Find Timesheets?

Timesheets are the start and finish times you have processed through either Stop/Start or Batch Edit Shifts.

Each day is processed as a timesheet, and you will be able to find them on each worker.

The screenshot shows the DatumRPO Finance interface. The top navigation bar includes links for Inbox, Plan, Attendance, Finance, Clients, Workers, and Reports. The Finance menu is open, showing options: Shifts to be approved, Queried shifts, Approved shifts, Weekly guarantees, Unsubmitted shifts (highlighted with a red box), Statements, Timesheets, Invoices, and Site locks. On the left sidebar, the Timesheets option is also highlighted with a red box. A red arrow points from the Timesheets option in the sidebar to the Unsubmitted shifts option in the Finance menu. Below the navigation, there is a table titled 'Timesheets' with columns: Worker, Hours, Work value, Expenses, Charge value, and Pay value. The table lists several workers and their corresponding timesheet data.

Worker	Hours	Work value	Expenses	Charge value	Pay value
Total: 5 rows	20.73	248.80	-	248.80	207.33
Arkil, Witty	0.03	0.40	-	0.40	0.33
Cutten, Andy	0.03	0.40	-	0.40	0.33
Gillmore, Daryle	8.17	98.00	-	98.00	81.67
Rowatt, Ursola	6.25	75.00	-	75.00	62.50
Whatling, Pablo	6.25	75.00	-	75.00	62.50

What's On The Timesheets?

Below is some information on the timesheets represented by different columns.

Status of open timesheets and unsubmitted

How many timesheets

Total value to client for all workers

Total charge to client with adjustments for all workers

Total pay for all workers

Total hours processed for all workers

Shifts to be approved >

Queried shifts >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts >

Statements >

Timesheets >

Adjustments >

Invoices >

< Previous

Next >

Timesheets: W16 2021 (from 19-04-2021 to 25-04-2021)

Worker	Job card	Adj.	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 53 rows			189	1,982.50	30,276.49	-	30,276.49	23,250.12
	Pallet Operative	①		19.50	134.24	-	134.24	103.36
	Pallet Operative	③		34.50	487.50	-	487.50	375.36
	Pallet Operative	⑤		55.00	847.38	-	847.38	647.36
	Pallet Operative	③		32.50	459.24	-	459.24	353.60

What's On The Timesheets?

Further information on the timesheets represented by different columns.

Shifts to be approved >

Queried shifts >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts >

Statements >

Timesheets >

Adjustments >

Invoices >

< Previous

Next >

Timesheets: W16 2021 (from 19-04-2021 to 25-04-2021)

Worker	Job card	Adj.	Status	Hours	Work value	Expenses	Charge value	Pay value	
Total: 53 rows				0	1,982.50	30,276.49	-	30,276.49	23,250.12
Achea	Pallet Operative			9.50	134.24	-	134.24	103.36	
	Pallet Operative			34.50	487.50	-	487.50	375.36	
	Pallet Operative			55.00	847.38	-	847.38	647.36	
	Pallet Operative			32.50	459.24	-	459.24	353.60	

Job card which the worker is being pay rolled on

Total value to client

Total pay to worker

Worker's name

Total hours processed

Total charge to client with adjustments

How To View Timesheets?

The timesheets represent each day the worker has worked, including hours processed with charge and pay totals for each day.

Shifts to be approved >

Queried shifts >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts >

Statements >

Timesheets >

Adjustments >

Invoices >

Worker Choose a worker...

Job card Choose a job card...

Period for report

Previous

Timesheets: W17 2021 (from 26-04-2021 to 02-05-2021)

Worker	Job card	Adj.	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 50 rows			189	125.00	1,786.22	-	1,786.22	1,375.36
	Pallet Operative		①	9.50	134.24	-	134.24	100.36 >
	Pallet Operative		③	31.50	445.11	-	445.11	342.72 v

shifts

W17 2021 for Pallet Operative

	Status	Hours	Expenses	Charge value	Pay value
24-04-2021 06:00	Unsubmitted	8h 30m	0.00	120.11	92.48 >
25-04-2021 06:00	Unsubmitted	11h 30m	0.00	162.50	125.12 >
26-04-2021 06:00	Unsubmitted	11h 30m	0.00	162.50	125.12 >
Total		31h 30m	£0.00	£445.11	£342.72

Add historic timesheet adjustment Add manual adjustment

Timesheets which have been created for the worker, that haven't yet been submitted and are highlighted pink

What Information Is On Each Timesheet?

Click on the day you would like to view. Each section represents the job card rules and hours processed.

shifts

W17 2021 for Pallet Operative

Status	Hours	Expenses	Charge value	Pay value
24-04-2021 06:00 Unsubmitted	8h 30m	0.00	120.11	92.48

Job card: **Pallet Operative**

Rate schedule: **PAYE: Pre-parity**

Rate type: **Dynamic**

[Shift details](#)

Booked start: 06:00 (Sat)

Actual start: 06:00

Actual stop: 15:00

Shift value breakdown	Hours	Charge value	Pay value
Shift length	9 hours		
Adjustments (time)	-		
Unpaid break	-30 mins		
Billable shift length	8h 30m		
Wk day (chg. £14.13, pay £10.88)	8h 30m	£120.11	£92.48
Total		£120.11	£92.48

+ Raise a query

25-04-2021 06:00 Unsubmitted	11h 30m	0.00	162.50	125.12
26-04-2021 06:00 Unsubmitted	11h 30m	0.00	162.50	125.12
Total	31h 30m	£0.00	£445.11	£342.72

[Add historic timesheet adjustment](#) [Add manual adjustment](#)

The first part is information that has been placed on the job card.

You can also go to the job card from this section by either

clicking on:
Job Card
Rate schedule
Shift details

What Information Is On Each Timesheet?

The second part of the timesheet is the shift value breakdown.

shifts					
W17 2021 for Pallet Operative					
Status	Hours	Expenses	Charge value	Pay value	
24-04-2021 06:00	Unsubmitted	8h 30m	0.00	120.11	92.48
<div>Job card: Pallet Operative Booked start: 06:00 (Sat)</div> <div>Rate schedule: PAYE: Pre-parity Actual start: 06:00</div> <div>Rate type: Dynamic Actual stop: 15:00</div> <div>Shift details</div>					
Shift value breakdown		Hours	Charge value	Pay value	
Shift length		9 hours			
Adjustments (time)		-			
Unpaid break		-30 mins			
Billable shift length		8h 30m			
Wk day (chg. £14.13, pay £10.88)		8h 30m	£120.11	£92.48	
Total			£120.11	£92.48	
+ Raise a query					
25-04-2021 06:00	Unsubmitted	11h 30m	0.00	162.50	125.12
26-04-2021 06:00	Unsubmitted	11h 30m	0.00	162.50	125.12
Total		31h 30m	£0.00	£445.11	£342.72
<div>Add historic timesheet adjustment</div> <div>Add manual adjustment</div>					

This part shows the shift length, any adjustments, unpaid breaks and the total shift length billable to the client

What Information Is On Each Timesheet?

The last part of the timesheet is the total costs.

shifts

W17 2021 for Pallet Operative

Status	Hours	Expenses	Charge value	Pay value
24-04-2021 06:00 Unsubmitted	8h 30m	0.00	120.11	92.48

Job card: **Pallet Operative** Booked start: **06:00 (Sat)**
Rate schedule: **PAYE: Pre-parity** Actual start: **06:00**
Rate type: **Dynamic** Actual stop: **15:00**
[Shift details](#)

Shift value breakdown	Hours	Charge value	Pay value
Shift length	9 hours		
Adjustments (time)	-		
Unpaid break	-30 mins		
Billable shift length	8h 30m		
Wk day (chg. £14.13, pay £10.88)	8h 30m	£120.11	£92.48
Total		£120.11	£92.48

+ Raise a query

25-04-2021 06:00 Unsubmitted	11h 30m	0.00	162.50	125.12
26-04-2021 06:00 Unsubmitted	11h 30m	0.00	162.50	125.12
Total	31h 30m	£0.00	£445.11	£342.72

[Add historic timesheet adjustment](#) [Add manual adjustment](#)

The final part is the charge rate, pay rate, hours, charge value and pay value

What Are Historic And Manual Adjustments?

These are for any missing payments or adjusted rates.

shifts

W17 2021 for Pallet Operative

Status	Hours	Expenses	Charge value	Pay value
24-04-2021 06:00 Unsubmitted	8h 30m	0.00	120.11	92.48

Job card: **Pallet Operative**

Rate schedule: **PAYE: Pre-parity**

Rate type: **Dynamic**

[Shift details](#)

Booked start: **06:00 (Sat)**

Actual start: **06:00**

Actual stop: **15:00**

Shift value breakdown	Hours	Charge value	Pay value
Shift length	9 hours		
Adjustments (time)	-		
Unpaid break	-30 mins		
Billable shift length	8h 30m		
Wk day (chg. £14.13, pay £10.88)	8h 30m	£120.11	£92.48
Total		£120.11	£92.48

+ Raise a query

25-04-2021 06:00 Unsubmitted	11h 30m	0.00	162.50	125.12
26-04-2021 06:00 Unsubmitted	11h 30m	0.00	162.50	125.12
Total	31h 30m	£0.00	£445.11	£342.72

Add historic timesheet adjustment

Add manual adjustment

Please see the How To Guide on historic and manual adjustments for more information.

UNSUBMITTED SHIFTS

What Is An Unsubmitted shift?

An **Unsubmitted Shifts** are timesheets that have been created and are waiting to be processed for payroll.

This is where you can check the hours and costing for each job card before submitting the **Unsubmitted Shifts**.

Go to Finance > Unsubmitted Shifts.

The screenshot shows the DatumRPO interface. The top navigation bar includes 'Inbox', 'Plan', 'Attendance', 'Finance', 'Clients', 'Workers', and 'Reports'. The 'Finance' menu is open, showing options like 'Shifts to be approved', 'Queried shifts', 'Approved shifts', 'Weekly guarantees', 'Unsubmitted shifts' (highlighted with a red box), 'Statements', 'Timesheets', 'Invoices', and 'Site locks'. On the left sidebar, under 'Unsubmitted shifts', there is a list of items: 'Shifts to be approved 0', 'Queried shifts 0', 'Approved shifts', 'Weekly guarantees', 'Unsubmitted shifts 3' (highlighted with a red box), 'Statements', 'Timesheets', 'Adjustments', and 'Invoices'. The main content area shows a table of 'Unsubmitted shifts' with columns for 'Date', 'Worker', 'Job card', 'Hours', 'Charge value', and 'Pay value'. The table contains three rows of data for Tuesday, 13 Sep 2022.

Date	Worker	Job card	Hours	Charge value	Pay value
Tue 13 Sep 2022	Gillmore, Daryle	Packer	8.17	98.00	81.67
Tue 13 Sep 2022	Rowatt, Ursola	Packer	6.25	75.00	62.50
Tue 13 Sep 2022	Whatling, Pablo	Packer	6.25	75.00	62.50

How To Submit Your Unsubmitted Shift?

You will be able to view all workers with hours on Universe.

When submitting unsubmitted shifts you are on your way to locking lines.

The screenshot shows a sidebar menu on the left with the following items: 'Shifts to be approved', 'Queried shifts', 'Approved shifts', 'Weekly guarantees', 'Unsubmitted shifts' (highlighted in teal), 'Statements', 'Timesheets', 'Adjustments', and 'Invoices'. The main content area is titled 'Unsubmitted shifts' and contains a table with columns: 'Date', 'Worker', 'Job card', 'Hours', 'Charge value', and 'Pay value'. The table shows a total of 2 rows and two individual rows for '27.04.21' 'Induction' shifts. A red box highlights the 'Submit' button at the top left of the table. Another red box highlights the checkbox in the first row of the table. Red arrows point from these boxes to the explanatory text on the right.

Date	Worker	Job card	Hours	Charge value	Pay value
Total: 2 rows			14.50	168.78	130.64
27.04.21		Induction	7.25	84.39	65.32
27.04.21		Induction	7.25	84.39	65.32

You can either submit all workers at a time or one by one.

For all workers you need to click on: [Unsubmitted shifts](#)



To submit worker's individually, click one box at a time.

APPROVED SHIFTS

Client Will Need To Approve Shifts?

Approved shifts need to be approved by your client by completing the next stage.

Where To Find Shifts To Be Approved?

This process happens after the shift has been submitted and continues the process of locking the payroll. The process will need to be completed by your client, find your site, go to Finance>Shifts to be approved.

Finance for Argos Aberdeen Warehouse

Shifts to be approved
Queried shifts: 0
Approved shifts
Weekly guarantees
Unsubmitted shifts: 3
Statements
Timesheets
Adjustments
Invoices

Worker Choose a worker...
Job card Choose a job card...

Approved shifts

Date	Worker	Job card	Hours	Charge value	Pay value
Total: 2 rows					
Tue 13 Sep 2022	Adair, Willy	Warehouse Operative	0.03	0.40	0.33
Tue 13 Sep 2022	Cutten, Andy	Warehouse Operative	0.03	0.40	0.33

Next **Unlock** the shifts to approve.

Finance for TestSiteRrol670 Following

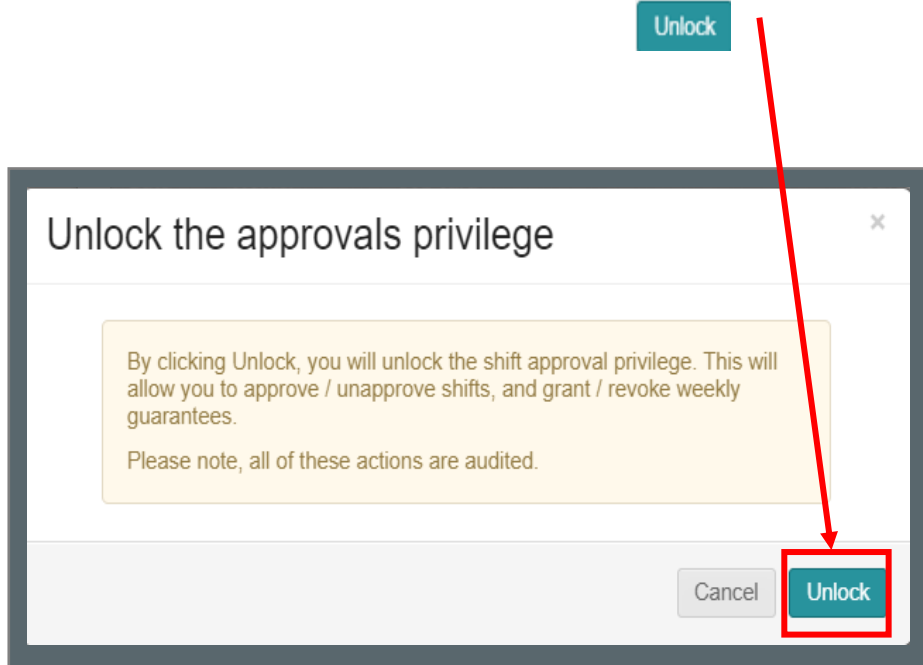
Shifts to be approved
Queried shifts
Approved shifts
Weekly guarantees
Unsubmitted shifts

Shifts to be approved

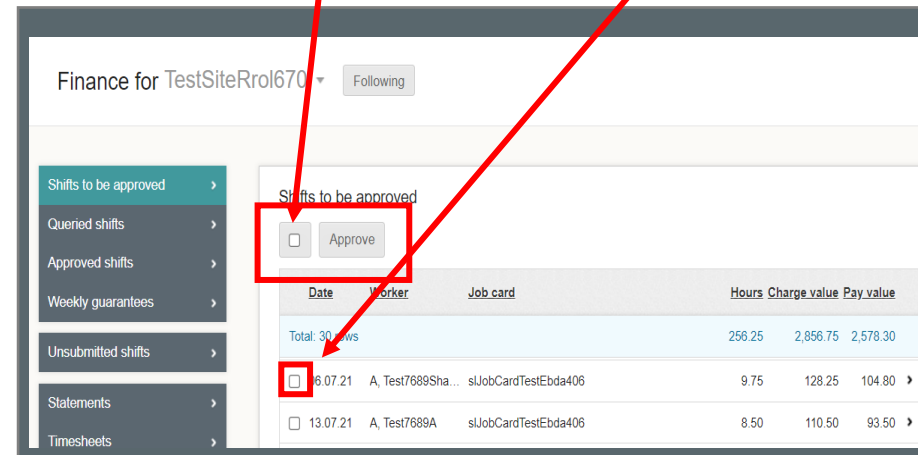
Date	Worker	Job card
Total: 12 rows		
24.05.21	A. Test7689A	slJobCardTestEbda

How To Approve Shifts?

Then a warning sign will pop up, and your client will need to press



You can now approve the shifts either individually or select all shifts.

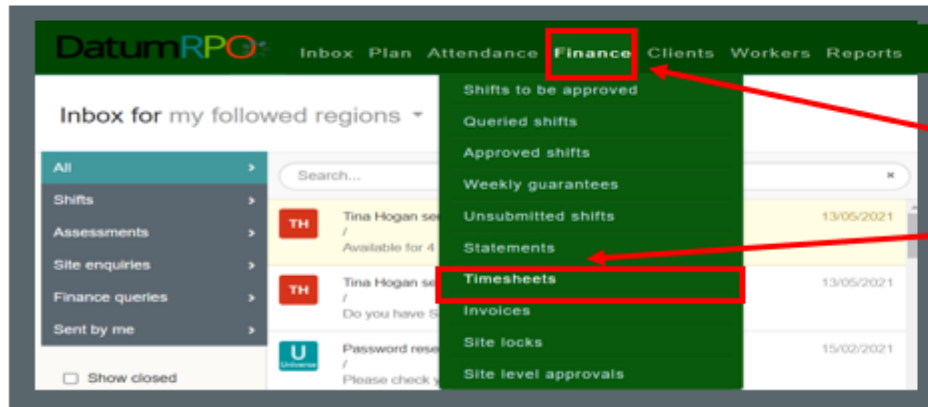


You have now completed how to approve shifts!

QUERY SHIFTS

Where To Query A Shift?

A query is where you have processed hours, approved the shifts and then noticed they are overpaid or underpaid due to incorrect start/stop times.



To begin this process,
go to Finance>Timesheets.

Click on the worker where you need to raise a query.

A screenshot of the DatumRPO Finance page for 'TestSiteRrol670'. The page shows a list of timesheets for the week of 24-05-2021 to 30-05-2021. The first row is highlighted with a red box, and a red arrow points from the text 'Click on the worker where you need to raise a query.' to the worker ID 'A, Test7689A'.

Worker	Job card	Adj.	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 4 rows				0	202.75	2,520.00	-	2,520.00 2,231.75
A, Test7689A	slJobCardTestEbda406			54.25	691.50	-	691.50	608.75
A, Test7689Sha...	slJobCardTestEbda406			51.50	643.00	-	643.00	568.50
A, Test 7689 VS...	slJobCardTestEbda406			53.50	678.50	-	678.50	598.00
Kxjkkynmi, Test	slJobCardTestEbda406			43.50	507.00	-	507.00	456.50

How To Raise The Query?

Open the timesheet you need to make the changes to.

Kxjkkyxnmi, Test slJobCardTestEbda406 43.50 507.00 - 507.00 456.50

Test Kxjkkyxnmi's shifts
W21 2021 for slJobCardTestEbda406

Status	Hours	Expenses	Charge value	Pay value	
25-05-2021 07:00	Approved	11h 15m	0.00	126.00	114.75 >
26-05-2021 06:00	Approved	11h 15m	0.00	126.00	114.75 >
27-05-2021 06:00	Approved	9h 45m	0.00	108.00	98.25 >
28-05-2021 06:00	Approved	11h 15m	0.00	126.00	114.75 >
Total worked		43h 30m		486.00	442.50
Weekly overtime			21.00	14.00	>
Total		43h 30m	£0.00	£507.00	£456.50

[Add historic timesheet adjustment](#) [Add manual adjustment](#)

Kxjkkyxnmi, Test slJobCardTestEbda406 43.50 507.00 - 507.00 456.50

Test Kxjkkyxnmi's shifts
W21 2021 for slJobCardTestEbda406

Status	Hours	Expenses	Charge value	Pay value	
25-05-2021 07:00	Approved	11h 15m	0.00	126.00	114.75 >

Job card: **slJobCardTestEbda406** Booked start: **07:00 (Tue)**
Rate schedule: **PAYE: Pre-parity** Actual start: **07:00**
Rate type: **Weekday** Actual stop: **19:00**
[Shift details](#)

Shift value breakdown	Hours	Charge value	Pay value
Shift length	12 hours		
Adjustments (time)	-		
Unpaid break	-45 mins		
Billable shift length	11h 15m		
Wk day (chg. £11.00, pay £10.00)	9 hours	£99.00	£90.00
Wk day OT (chg. £12.00, pay £11.00)	2h 15m	£27.00	£24.75
Total		£126.00	£114.75

[+ Raise a query](#)

Click on [+ Raise a query](#) this then will enable you to make changes.

How To Complete The Query?

Open the query and select from the dropdown the reason for the query.

The image displays two screenshots of a 'Raise a query' dialog box. The left screenshot shows the initial state with a dropdown menu labeled 'Please select a subject...' and a text input field labeled 'Message (optional)'. The right screenshot shows the dropdown menu open, displaying a list of options: 'Please select a subject...', 'Invalid expenses', 'Rest period incorrect', 'Shift start or end time incorrect', and 'Other'. Red arrows indicate the flow of the process: one arrow points from the instruction 'Open the query and select from the dropdown the reason for the query.' to the dropdown menu in the right screenshot, and another arrow points from the instruction 'You can also add notes to message the worker regarding the query.' to the 'Message (optional)' field in the left screenshot. Both screenshots have a 'Cancel' button and a 'Raise a query' button at the bottom right.

You can also add notes to message the worker regarding the query.

Where To Open And View Shift Details To Amend?

Go to Finance > Queried shifts.

The screenshot shows the DatumRPO interface. In the top navigation bar, the 'Finance' tab is highlighted. Below it, a dropdown menu lists various options, with 'Queried shifts' selected and highlighted. On the left sidebar, the 'Queried shifts' link is also highlighted. The main content area displays the details for a queried shift.

Open the query you have created and click on shift details.

Shift Details:

- Job card: [sIJobCardTestEbda406](#)
- Rate schedule: [PAYE: Pre-parity](#)
- Rate type: **Weekday**
- Booked start: **07:00 (Tue)**
- Actual start: **07:00**
- Actual stop: **19:00**

[Shift details](#)

Shift value breakdown	Hours	Charge value	Pay value
Shift length	12 hours		
Adjustments (time)	-		
Unpaid break	-45 mins		
Billable shift length	11h 15m		
Wk day (chg. £11.00, pay £10.00)	9 hours	£99.00	£90.00
Wk day OT (chg. £12.00, pay £11.00)	2h 15m	£27.00	£24.75
Total		£126.00	£114.75

Queries

Raised by **Tina Hogan (agent)**
4th June at 07:13

Shift start or end time incorrect **OPENED** [Close](#)

[+ Raise another query](#)

Where To Change The Time?

Click on the actual start time and change the start time to the correct time.

Finance

Shift information

TK

[Test Kxjkkyxnmi](#)

Mobile
+44 (0) 7549088636 ✖

Tue 25 May, 07:00

Cancel shift

Organisation

TestClientCixhhslaon

Site

TestSiteRrol670 - [Post shifts](#) | [Attendance](#) | [Finance](#)

Job card

slJobCardTestEbda406 - [Change](#)

Rate type

[PAYE: Pre-parity](#)

Daily guarantee

8h 30m

Status

Complete

 →

Queried

Charge rate

£11.00 per hour

Pay rate

£10.00 per hour (PAYE, Pre-parity)

	Start	Stop	Duration
Planned	07:00		
Actual	07:00	19:00	12 hours
Unpaid break			-45 mins

Where To Change The Time And Add Reason?

Add in the new time and use the dropdown to add in the reason. If required add a message for the worker. You will get a pop up advising on the start time, was the worker late. Click 'No' Unless they were late.

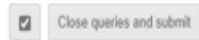
Once completed press:

Save shift details

How To Close The Query?

There are two ways you can close a query under queries.

1. At the top of the page close queries and submit

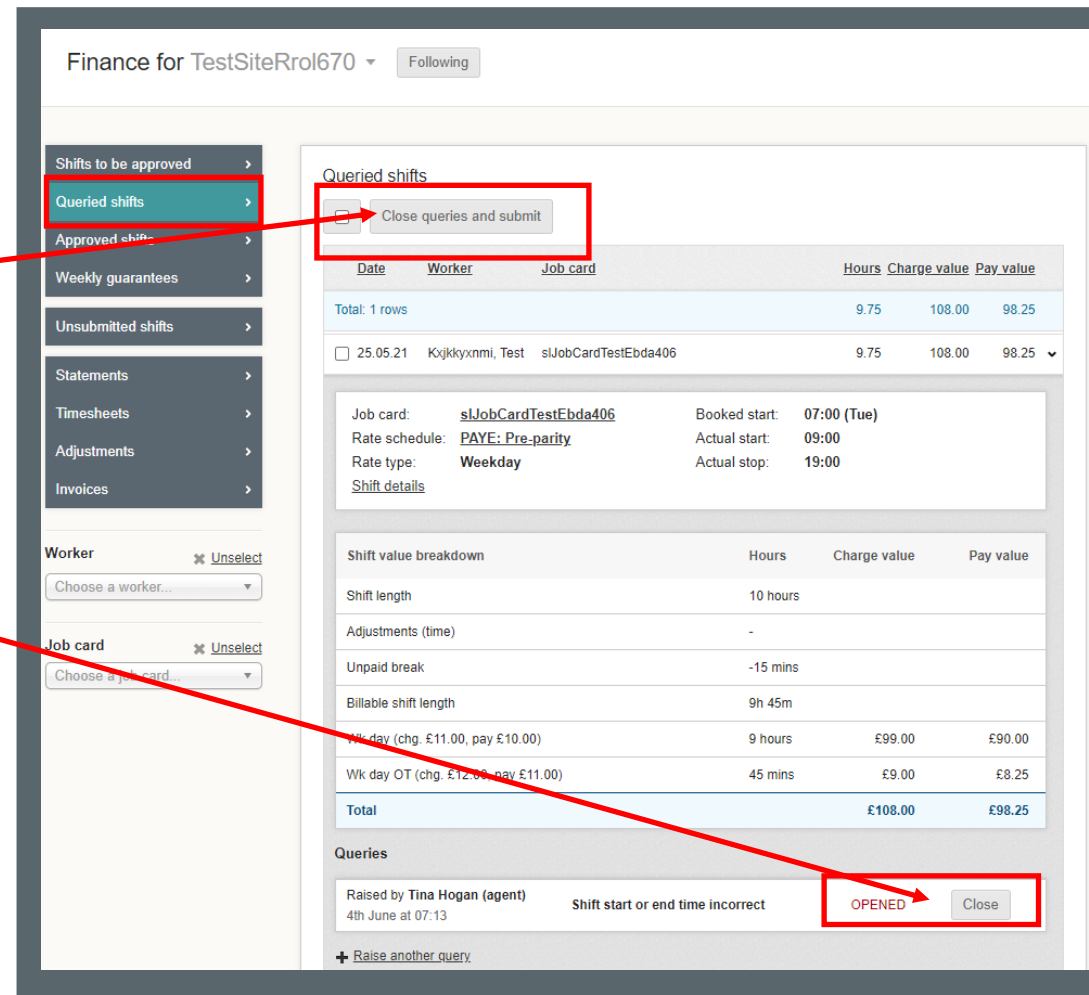


2. Or close - if you click on close you will then need to resubmit your shift

Raised by Tina Hogan (agent)
4th June at 07:13

Shift start or end time incorrect

CLOSED



Finance for TestSiteRrol670 ▾ Following

Shifts to be approved >
Queried shifts >
Approved shifts >
Weekly guarantees >
Unsubmitted shifts >
Statements >
Timesheets >
Adjustments >
Invoices >

☒ Close queries and submit

Queried shifts

Date	Worker	Job card	Hours	Charge value	Pay value
Total: 1 rows					
<input type="checkbox"/> 25.05.21	Kqjkyxnm, Test	slJobCardTestEbda406	9.75	108.00	98.25

Job card: [slJobCardTestEbda406](#) Booked start: 07:00 (Tue)
Rate schedule: [PAYE: Pre-parity](#) Actual start: 09:00
Rate type: [Weekday](#) Actual stop: 19:00
[Shift details](#)

Shift value breakdown	Hours	Charge value	Pay value
Shift length	10 hours		
Adjustments (time)	-		
Unpaid break	-15 mins		
Billable shift length	9h 45m		
Wk day (chg. £11.00, pay £10.00)	9 hours	£99.00	£90.00
Wk day OT (chg. £12.00, pay £11.00)	45 mins	£9.00	£8.25
Total		£108.00	£98.25

Queries

Raised by Tina Hogan (agent) Shift start or end time incorrect
4th June at 07:13

OPENED

+ Raise another query

Where To View The Changes?

Queried shifts

☐ Close queries and submit

Date	Worker	Job card	Hours	Charge value	Pay value
Total: 1 rows			9.75	108.00	98.25
<input type="checkbox"/> 25.05.21	Kxjkkyxnmi, Test	slJobCardTestEbda406	9.75	108.00	98.25

Job card: [slJobCardTestEbda406](#)

Rate schedule: [PAYE: Pre-parity](#)

Rate type: **Weekday**

[Shift details](#)

Booked start: **07:00 (Tue)**

Actual start: **09:00**

Actual stop: **19:00**

Shift value breakdown	Hours	Charge value	Pay value
Shift length	10 hours		
Adjustments (time)	-		
Unpaid break	-15 mins		
Billable shift length	9h 45m		
Wk day (chg. £11.00, pay £10.00)	9 hours	£99.00	£90.00
Wk day OT (chg. £12.00, pay £11.00)	45 mins	£9.00	£8.25
Total		£108.00	£98.25

Queries

Raised by **Tina Hogan (agent)**
4th June at 07:13

Shift start or end time incorrect

CLOSED

+ [Raise another query](#)

Once you have completed the changes you can view the closed query on the timesheet.

You have now completed how to amend, view and close a query!

WEEKLY GUARANTEES

How Do I View & Action Weekly Guarantees?

To view and manage any weekly guarantees you may have, go to the 'Finance' tab and select 'Weekly Guarantees'. You will now see any workers how are eligible for weekly guarantees.

The screenshot shows the DatumRPO interface. The top navigation bar has tabs for Plan, Attendance, Finance (highlighted with a red box), Workers, and Reports. The user is logged in as 'CU Client User'. The main content area is titled 'Finance for Acton Gate - Warehouse' with a 'Following' button. On the left sidebar, 'Weekly guarantees' is highlighted with a red box. The main table displays 'Weekly guarantees: W38 2022 (from Mon 19 Sep to Sun 25 Sep)'. The table has columns: Worker, Job card, Status, Hours, Charge value, and Pay value. A red box highlights the table content, and a red arrow points from the 'Finance' tab to the table.

Worker	Job card	Status	Hours	Charge value	Pay value
Total: 3 rows			20.00	246.50	0.00
One, Jamie	Van Driver	Granted	20.00	246.50	N/A
One, Leanne	Van Driver	Eligible	0	0.00	N/A
One, Tina	Van Driver	Eligible	0	0.00	N/A

How Do I View & Action Weekly Guarantees?

To grant a workers weekly guarantees, click on the eligible workers banner to view the detail and then click 'Grant Weekly Guarantees'.

The screenshot shows the DatumRPO interface. The top navigation bar includes 'Plan', 'Attendance', 'Finance' (selected), 'Workers', and 'Reports'. The user is logged in as 'CU Client User'. The main section is titled 'Finance for Acton Gate - Warehouse' with a 'Following' button. On the left, a sidebar lists various actions: 'Shifts to be approved 5', 'Queried shifts 0', 'Approved shifts', 'Weekly guarantees' (highlighted), 'Unsubmitted shifts 0', 'Statements', 'Timesheets', and 'Adjustments'. Below the sidebar, there are dropdowns for 'Worker' and 'Job card'. The main content area displays 'Weekly guarantees: W38 2022 (from Mon 19 Sep to Sun 25 Sep)'. A table lists the worker 'One, Jamie' as 'Eligible' with 1.00 hours and a charge value of 18.50. Below this, 'Jamie One's shifts' are listed for the week, showing two approved shifts on Sunday and Monday. A 'Grant weekly guarantee' button is at the bottom right. Red arrows highlight the 'Eligible' status, the worker's shifts, and the 'Grant weekly guarantee' button.

Shifts to be approved 5 >

Queried shifts 0 >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts 0 >

Statements >

Timesheets >

Adjustments >

Worker Unselect

Choose a worker...

Job card Unselect

Choose a job card...

Finance for Acton Gate - Warehouse Following

Weekly guarantees: W38 2022 (from Mon 19 Sep to Sun 25 Sep)

Worker	Job card	Status	Hours	Charge value	Pay value
Total: 1 rows			1.00	18.50	0.00
One, Jamie	Van Driver	Eligible	1.00	18.50	N/A

Jamie One's shifts
W38 2022 for Van Driver

Status	Hours	Expenses	Charge value
Sun, 18 Sep 2022, 06:00 Approved	30 mins	0.00	12.50
Mon, 19 Sep 2022, 06:00 Approved	30 mins	0.00	6.00
Total	1 hour	£0.00	£18.50

Grant weekly guarantee

How Do I View & Action Weekly Guarantees?

Once the weekly guarantees have been granted, you will be able to view the details of the weekly guarantee and see the hours and charge value.

The screenshot displays the DatumRPO interface for viewing weekly guarantees. On the left, a sidebar contains navigation links: 'Shifts to be approved 5', 'Queried shifts 0', 'Approved shifts', 'Weekly guarantees' (highlighted), 'Unsubmitted shifts 0', 'Statements', 'Timesheets', and 'Adjustments'. Below these are filters for 'Worker' (Unselect), 'Job card' (Unselect), and 'Period for report' (W38 2022).

The main content area shows 'Weekly guarantees: W38 2022 (from Mon 19 Sep to Sun 25 Sep)'. It contains a table with columns: Worker, Job card, Status, Hours, Charge value, and Pay value. The table shows a total of 1 row and a single entry for 'One, Jamie' (Van Driver) with a status of 'Granted', 20.00 hours, and a charge value of 246.50.

Below this, the section 'Jamie One's shifts' for 'W38 2022 for Van Driver' displays a table with columns: Status, Hours, Expenses, and Charge value. The table lists shifts for 'Sun, 18 Sep 2022, 06:00' and 'Mon, 19 Sep 2022, 06:00', both with a status of 'Approved'. A 'Total worked' row shows 1 hour and a charge value of 18.50. A 'Weekly guarantee' row is highlighted with a red box, showing 19 hours and a charge value of 228.00. A 'Total' row shows 20 hours and a charge value of £246.50. A 'Revoke weekly guarantee' button is located at the bottom right of the shifts table.

Worker	Job card	Status	Hours	Charge value	Pay value
Total: 1 rows			20.00	246.50	0.00
One, Jamie	Van Driver	Granted	20.00	246.50	N/A

Status	Hours	Expenses	Charge value
Sun, 18 Sep 2022, 06:00 Approved	30 mins	0.00	12.50
Mon, 19 Sep 2022, 06:00 Approved	30 mins	0.00	6.00
Total worked	1 hour		18.50
Weekly guarantee	19 hours		228.00
Total	20 hours	£0.00	£246.50

How Do I View & Action Weekly Guarantees?

If a weekly guarantee has been granted in error, you will be able to remove it by clicking 'Revoke Weekly Guarantee'. This will remove the weekly guarantee & restore the timesheet to its original state.

The screenshot displays the DatumRPO interface. On the left, a sidebar contains navigation links: 'Weekly guarantees', 'Unsubmitted shifts 0', 'Statements', 'Timesheets', and 'Adjustments'. Below these are filters for 'Worker' (with an 'Unselect' link and a dropdown menu), 'Job card' (with an 'Unselect' link and a dropdown menu), and 'Period for report' (set to 'W38 2022'). There is also a checkbox for 'Hide historic adjustments' and a '+ Add historic adjustment' button.

The main area shows a table of workers with columns: Worker, Job card, Adj. Status, Hours, Work value, Expenses, Charge value, and Pay value. The table lists several workers, including 'Demo, Dan', 'Four, Jamie', 'Four, Leanne', 'Four, Tina', 'One, Jamie', and 'One, Jamie' (Van Driver). A red circle highlights the '1' in the 'Adj. Status' column for 'Four, Jamie', 'Four, Leanne', and 'Four, Tina'.

Below the main table, a section titled 'Jamie One's shifts' shows a detailed view of his shifts for 'W38 2022 for Van Driver'. This section includes a table with columns: Status, Hours, Expenses, and Charge value. The shifts are listed for 'Sun, 18 Sep 2022, 06:00' and 'Mon, 19 Sep 2022, 06:00', both with a status of 'Approved'. A 'Total worked' row shows 1 hour and 18.50 charge value. A 'Weekly guarantee' row shows 19 hours and 228.00 charge value. A 'Total' row shows 20 hours, £0.00 expenses, and £246.50 charge value.

A red box highlights the 'Revoke weekly guarantee' button at the bottom right of the 'Jamie One's shifts' section.

STATEMENTS

How To Find Statements?

The screenshot shows the DatumRPO interface. The top navigation bar includes 'Inbox', 'Plan', 'Attendance', 'Finance', 'Clients', 'Workers', and 'Reports'. The 'Finance' menu is open, showing options: 'Shifts to be approved', 'Queried shifts', 'Approved shifts', 'Weekly guarantees', 'Unsubmitted shifts', 'Statements', 'Timesheets', 'Invoices', and 'Site locks'. The 'Statements' option is highlighted with a red box. Below the menu, there are filters for 'Job card' (set to 'Packer') and 'Period for report' (set to 'Choose a week'). A table of statements is visible, with columns for 'Week', 'Job card', 'Hours', 'Work value', 'Expenses', 'Charge value', and 'Pay value'.

Go to Finance > Statements

This gives you past or present timesheets where you can review hours and costings per job card.

The screenshot shows the 'Statements' page in DatumRPO. The left sidebar has a 'Job card' dropdown set to 'Packer' and a 'Period for report' dropdown set to 'Choose a week'. The main area displays a table of statements with columns: 'Week', 'Job card', 'Status', 'Hours', 'Work value', 'Expenses', 'Charge value', and 'Pay value'. The table shows data for various weeks and job cards, including 'General Operative 26 weeks', 'Supervisor PNC', 'General Operative Nights Shift - new', 'General Operative', and 'Induction'.

Week	Job card	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 616 rows			471	403,414.00	4,430,583.61	-	4,430,583.61 3,541,733.18
W20	General Operative 26 weeks	9	40.00	504.27	-	504.27	400.00
W20	Supervisor PNC	5	24.00	0.00	-	0.00	221.04
W20	General Operative Nights Shift - new	22	119.00	1,559.16	-	1,559.16	1,236.54
W20	General Operative	319	1,501.25	18,214.32	-	18,214.32	14,465.18
W20	Induction	2	4.00	44.40	-	44.40	35.64
W19	General Operative		3,043.75	37,195.54	-	37,195.54	29,537.53
W19	Induction		6.00	66.60	-	66.60	53.46
W19	Key Op Pre 5th Apr 2021		54.00	741.96	-	741.96	588.06
W19	Supervisor PNC		40.00	0.00	-	0.00	368.40
W19	General Operative 26 weeks		94.00	1,186.00	-	1,186.00	940.00
W19	General Operative Nights Shift - new		107.00	1,372.79	-	1,372.79	1,089.10
W18	General Operative Nights Shift - new		92.75	1,152.94	-	1,152.94	915.14

How To View Statements?

Shifts to be approved >

Queried shifts >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts >

Statements >

Timesheets >

Adjustments >

Invoices >

Job card ✖ Unselect

Choose a job card...

Period for report ✖ Unselect

Choose a week

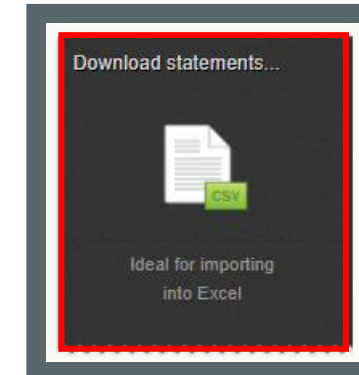
☐ Site summary

Download statements...

Statements

Week	Job card	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 516 rows		103	222,380.62	3,062,402.94	-	3,062,402.94	2,376,815.86
W20	Cream Production Nights G3	1	11.50	175.15	-	175.15	134.67
W20	Despatch Days G3	17	101.50	1,275.89	-	1,275.89	982.52
W20	ESL Nights	2	11.50	175.15	-	175.15	134.67
W20	Milk Production Days G3	11	79.00	1,118.40	-	1,118.40	860.18
W20	Milk Production Nights G3	9	125.00	1,932.78	-	1,932.78	1,485.88
W20	Induction		2.50	28.90	-	28.90	22.28
W20	Cream Production Days G3	8	69.00	867.36	-	867.36	667.92
W20	Despatch Nights G3	45	435.50	6,758.43	-	6,758.43	5,195.57
W19	Cream Production Nights G3		80.50	1,235.71	-	1,235.71	950.05
W19	Induction		13.50	156.06	-	156.06	120.30
W19	Despatch Nights G3		994.33	15,518.07	-	15,518.07	11,915.47
W19	Milk Production Days G3		255.50	3,488.93	-	3,488.93	2,686.48
W19	ESL Nights		57.50	875.75	-		
W19	Milk Production Nights G3		354.50	5,526.96	-		
W19	Cream Production Days G3		80.50	1,074.59	-		
W19	Despatch Days G3		443.17	5,707.44	-		
W18	FLT Operative Nights G3		34.50	531.34	-		
W18	ESL Days		50.00	691.19	-		
W18	Milk Production Days G3		314.50	4,294.69	-		

You can view a statement by downloading the CSV into excel spreadsheet.



Client on the week or weeks you require and click on download.

Download statements CSV report

You can download statements report for specified weeks.

From week

W20 2021

To week

W20 2021

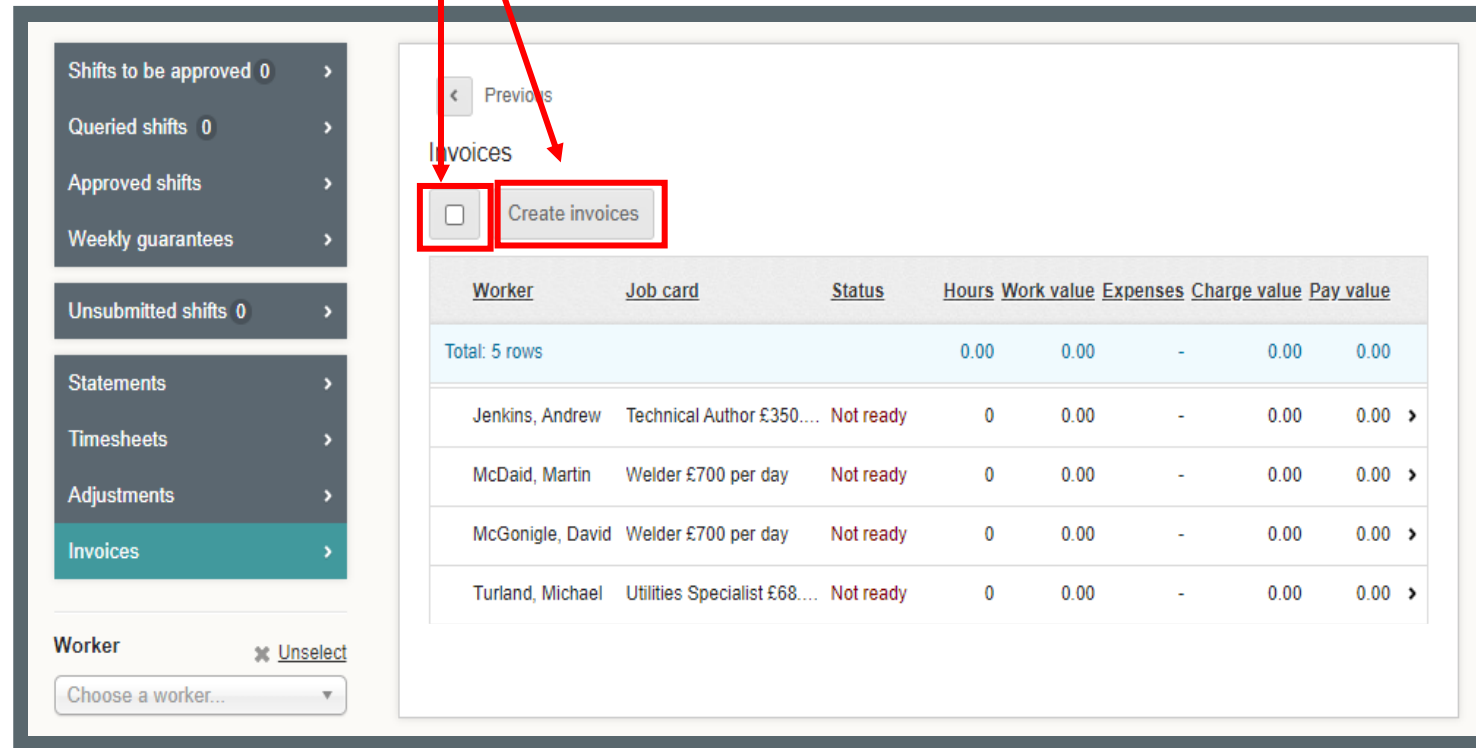
Cancel

Download

INVOICES

How Do I Create A Invoice?

On your finance page go to your Invoices and once you have processed the hours you need to click on invoices.

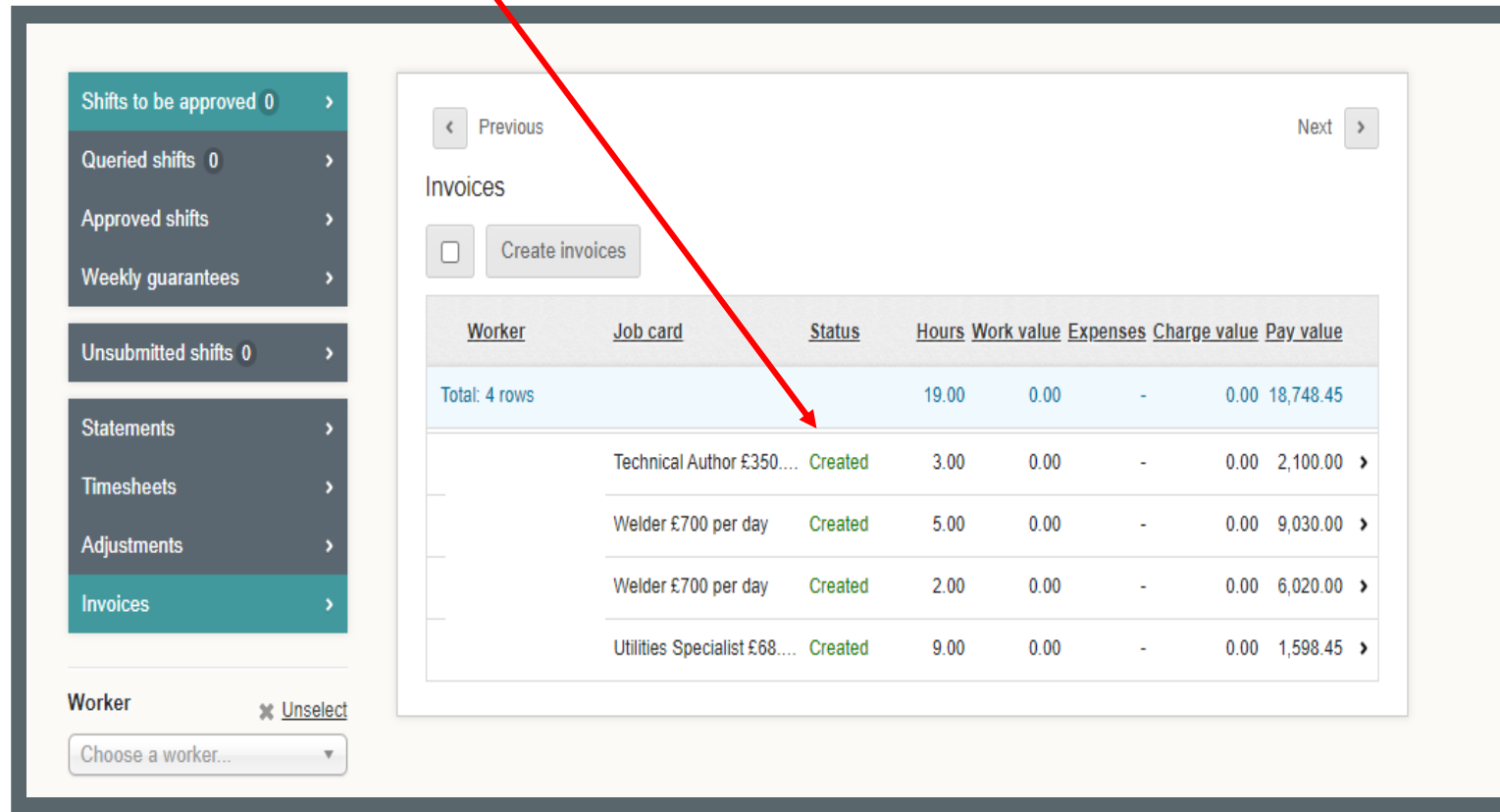


The screenshot displays the 'Invoices' section of the DatumRPO interface. On the left sidebar, the 'Invoices' menu item is highlighted. Below the sidebar, there is a 'Worker' dropdown menu with a 'Choose a worker...' option. The main content area shows a table of invoices. A red arrow points from the text above to the 'Create invoices' button, which is highlighted with a red box. The table lists workers, their job cards, status, hours, and various values.

Worker	Job card	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 5 rows			0.00	0.00	-	0.00	0.00
Jenkins, Andrew	Technical Author £350....	Not ready	0	0.00	-	0.00	0.00
McDaid, Martin	Welder £700 per day	Not ready	0	0.00	-	0.00	0.00
McGonigle, David	Welder £700 per day	Not ready	0	0.00	-	0.00	0.00
Turland, Michael	Utilities Specialist £68....	Not ready	0	0.00	-	0.00	0.00

How Do I Create A Invoice?

Once you have created your invoice you will see created on the profile.



The screenshot displays the 'Invoices' section of the DatumRPO interface. On the left, a sidebar contains navigation links: 'Shifts to be approved 0', 'Queried shifts 0', 'Approved shifts', 'Weekly guarantees', 'Unsubmitted shifts 0', 'Statements', 'Timesheets', 'Adjustments', and 'Invoices' (which is highlighted). Below the sidebar, there is a 'Worker' section with an 'Unselect' button and a dropdown menu labeled 'Choose a worker...'. The main content area shows a table of invoices. At the top, there are 'Previous' and 'Next' navigation buttons, a 'Create invoices' button, and a 'Total: 4 rows' summary. The table has columns for Worker, Job card, Status, Hours, Work value, Expenses, Charge value, and Pay value. A red arrow points from the text above to the 'Created' status of the first invoice row.

Worker	Job card	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 4 rows			19.00	0.00	-	0.00	18,748.45
	Technical Author £350....	Created	3.00	0.00	-	0.00	2,100.00
	Welder £700 per day	Created	5.00	0.00	-	0.00	9,030.00
	Welder £700 per day	Created	2.00	0.00	-	0.00	6,020.00
	Utilities Specialist £68....	Created	9.00	0.00	-	0.00	1,598.45

MANUAL ADJUSTMENTS BONUS

What Is A Manual Adjustment?

A manual adjustment can be entered at any time if there is a timesheet. A manual adjustment is where we need to deduct, refund or pay a shift bonus. The **correct** way to process this is through a manual adjustment and not an historic adjustment.

Click on Finance>Timesheets and search for your site.

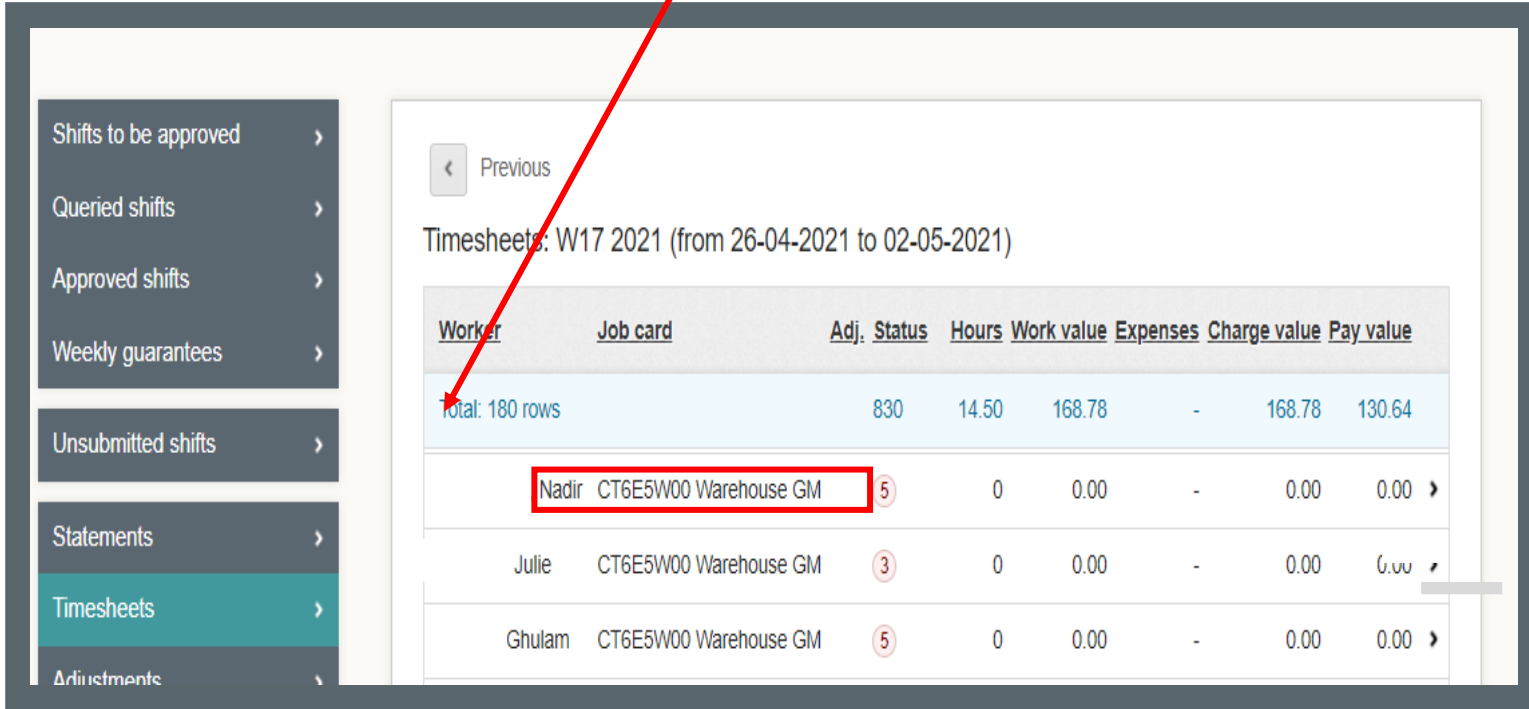
The screenshot shows the DatumRPO Finance interface. The top navigation bar includes 'Inbox', 'Plan', 'Attendance', 'Finance', 'Clients', 'Workers', and 'Reports'. The 'Finance' menu is open, showing options like 'Shifts to be approved', 'Queried shifts', 'Approved shifts', 'Weekly guarantees', 'Unsubmitted shifts', 'Statements', 'Timesheets', 'Invoices', and 'Site locks'. The 'Timesheets' option is highlighted. Below the menu, there is a search bar labeled 'Search for sites' and a list of sites including 'Agency_1 / HQ', 'ARGOS Home Delivery DHL / Acton Gate - Transport', 'ARGOS Home Delivery DHL / Acton Gate - Warehouse', 'ARGOS Home Delivery DHL / Argos Aberdeen Transport', 'ARGOS Home Delivery DHL / Argos Aberdeen Warehouse', 'ARGOS Home Delivery DHL / Carlisle', 'KAM / KAM Peterborough', and 'UAT Client / UAT Site'. The 'Timesheets' option is also highlighted in the left sidebar.

Worker	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 23 rows		171.03	2,058.90	-		
Beil, Sarah	Warehouse Operative	8.00	96.00	-		
Demo, Dan	Warehouse Operative	8.28	99.40	-		
Harris, Ian	Warehouse Operative	0	0.00	-		
Hodgson, Lisa	Van Driver	10.00	120.00	-		
Hodgson, Lisa	Warehouse Operative	0	0.00	-		

Status	Hours	Work value	Expenses	Charge value	Pay value
9	171.03	2,058.90	-	2,058.90	1,715.33
(1)	8.00	96.00	-	96.00	80.00
(1)	8.28	99.40	-	99.40	82.83

Where To Find Manual Adjustment To Add Shift Bonus?

To add a manual adjustment, click on the worker you require to make the adjustment to and open the timesheet.



Shifts to be approved >

Queried shifts >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts >

Statements >

Timesheets >

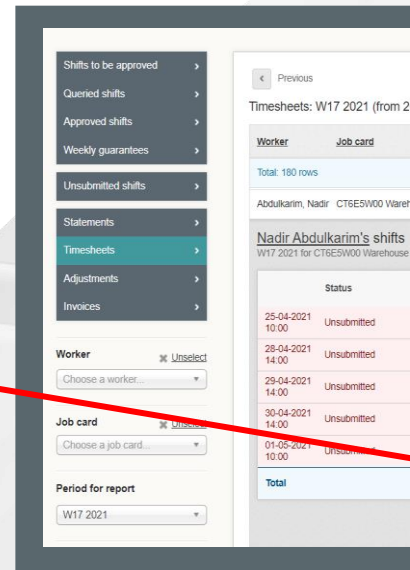
Adjustments >

Previous

Timesheets: W17 2021 (from 26-04-2021 to 02-05-2021)

Worker	Job card	Adj.	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 180 rows		830		14.50	168.78	-	168.78	130.64
Nadir	CT6E5W00 Warehouse GM	5		0	0.00	-	0.00	0.00
Julie	CT6E5W00 Warehouse GM	3		0	0.00	-	0.00	0.00
Ghulam	CT6E5W00 Warehouse GM	5		0	0.00	-	0.00	0.00

Next click on **Add manual adjustment**



Shifts to be approved >

Queried shifts >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts >

Statements >

Timesheets >

Adjustments >

Invoices >

Previous

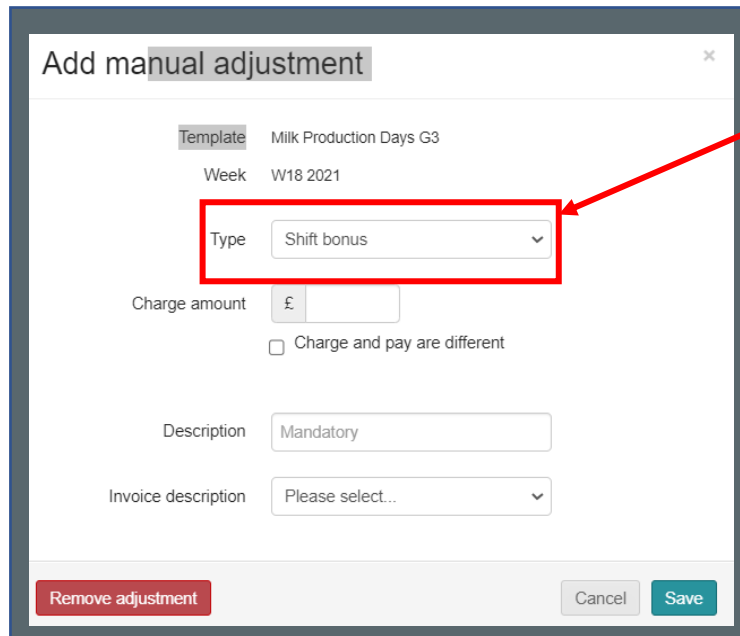
Timesheets: W17 2021 (from 26-04-2021 to 02-05-2021)

Worker	Job card	Adj.	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 180 rows		830		14.50	168.78	-	168.78	130.64
Nadir	CT6E5W00 Warehouse GM	5		0	0.00	-	0.00	0.00
Julie	CT6E5W00 Warehouse GM	3		0	0.00	-	0.00	0.00
Ghulam	CT6E5W00 Warehouse GM	5		0	0.00	-	0.00	0.00

How To Add A Manual Shift Bonus Adjustment?

The manual adjustment can be entered at any time, if there is a timesheet.

Shift bonus payments are for any extra pay that is a bonus, and the worker doesn't accrue holiday pay. This means it doesn't go through the shift allocation but is done as a manual adjustment or a download adjustment.



Add manual adjustment

Template Milk Production Days G3

Week W18 2021

Type Shift bonus

Charge amount £

☐ Charge and pay are different

Description Mandatory

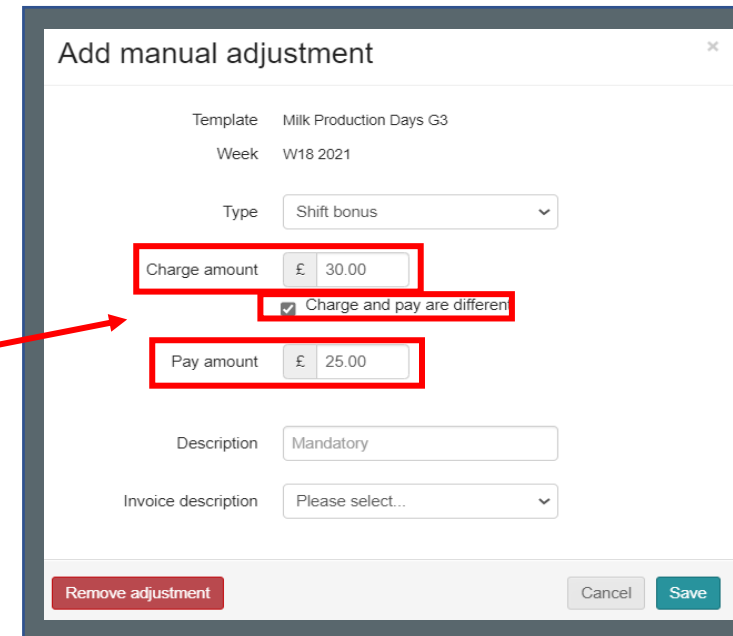
Invoice description Please select...

Remove adjustment Cancel Save

Go to type and click in the box.

You will then see your drop down and click on shift bonus.

Next click on the charge amount then add the payment amount click on the ☒ Charge and pay are different box and add amount.



Add manual adjustment

Template Milk Production Days G3

Week W18 2021

Type Shift bonus

Charge amount £ 30.00

☒ Charge and pay are different

Pay amount £ 25.00

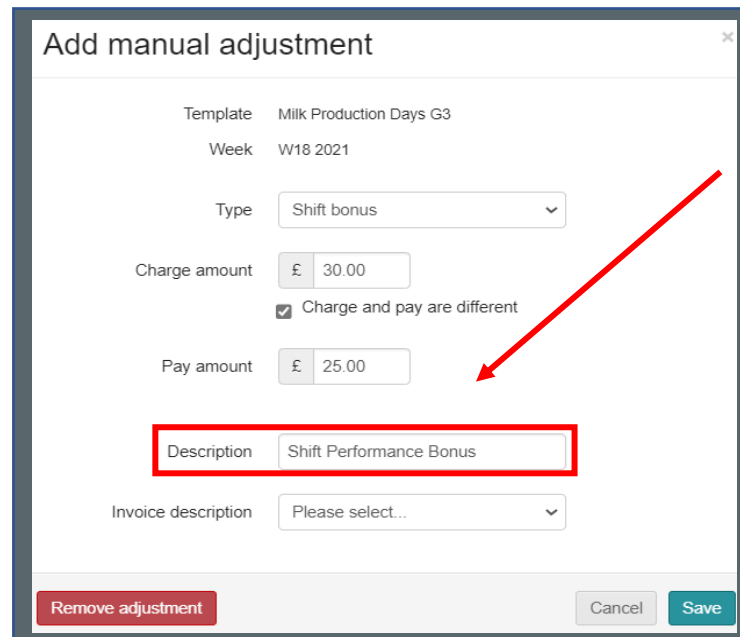
Description Mandatory

Invoice description Please select...

Remove adjustment Cancel Save

How To Add A Manual Shift Bonus Adjustment?

Next you need to add your description and invoice description.

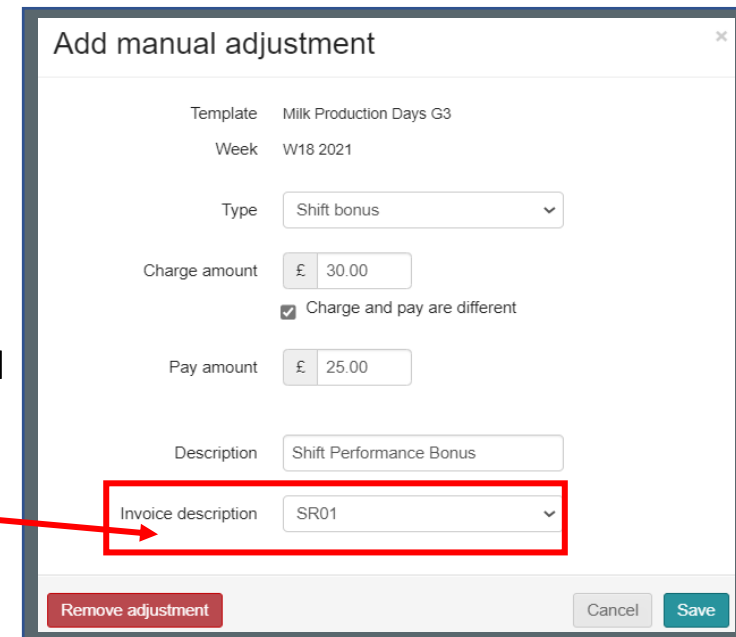


The screenshot shows the 'Add manual adjustment' form. The 'Description' field is highlighted with a red box and a red arrow pointing to it. The form contains the following fields:

- Template: Milk Production Days G3
- Week: W18 2021
- Type: Shift bonus (dropdown)
- Charge amount: £ 30.00
- ☒ Charge and pay are different
- Pay amount: £ 25.00
- Description: Shift Performance Bonus (highlighted)
- Invoice description: Please select... (dropdown)
- Buttons: Remove adjustment, Cancel, Save

Go to Description, click in the box and type in what it is for.

Last thing is to click on invoice description and select SR01 from the drop down.



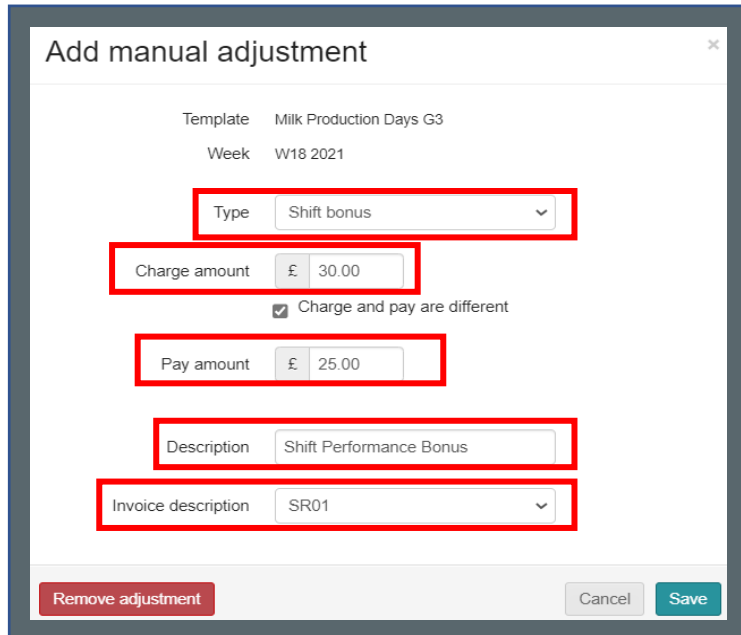
The screenshot shows the 'Add manual adjustment' form. The 'Invoice description' field is highlighted with a red box and a red arrow pointing to it. The form contains the following fields:

- Template: Milk Production Days G3
- Week: W18 2021
- Type: Shift bonus (dropdown)
- Charge amount: £ 30.00
- ☒ Charge and pay are different
- Pay amount: £ 25.00
- Description: Shift Performance Bonus
- Invoice description: SR01 (highlighted)
- Buttons: Remove adjustment, Cancel, Save

If shift bonus is for supervisor check in don't add charge amount, add in description 'Supervisor Check In'.

How To Complete A Manual Shift Bonus Adjustment?

Finally do your check list before saving.



The screenshot shows a dialog box titled "Add manual adjustment" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Template: Milk Production Days G3
- Week: W18 2021
- Type: Shift bonus (dropdown menu)
- Charge amount: £ 30.00
- ☒ Charge and pay are different
- Pay amount: £ 25.00
- Description: Shift Performance Bonus
- Invoice description: SR01 (dropdown menu)

At the bottom of the dialog, there are three buttons: "Remove adjustment" (red), "Cancel" (grey), and "Save" (teal).

Correct Type ✓

Correct Charge amount ✓

Correct Pay amount ✓

Correct Description ✓

Correct Invoice description ✓

Then click on 

HISTORIC ADJUSTED RATES

What Is A Historic Adjustment?

A historic adjustment is where we have missed payment for a worker. It might be basic hours, overtime or backpay. This is the **correct** way to process missing payments and **not through manual adjustments**.

Click on Finance>Timesheets and then search for your site.

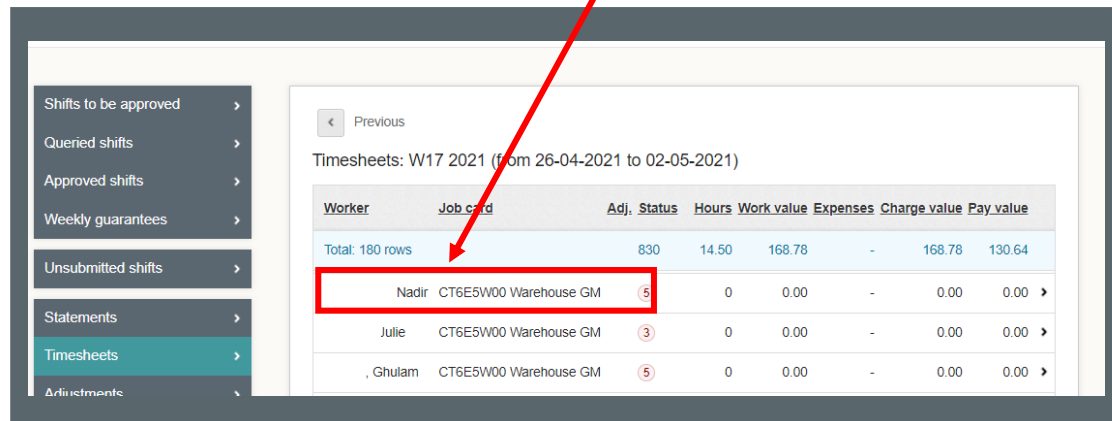
The screenshot shows the DatumRPO interface with the 'Finance' menu open. The 'Timesheets' option is highlighted. Below the menu, there is a table of workers and their timesheet data. The table has columns for Worker, Status, Hours, Work value, Expenses, Charge value, and Pay value. The data is as follows:

Worker	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 23 rows		171.03	2,058.90	-		
Bell, Sarah	Warehouse Operative	8.00	96.00	-		
Demo, Dan	Warehouse Operative	8.28	99.40	-		
Harris, Ian	Warehouse Operative	0	0.00	-		
Hodgson, Lisa	Van Driver	10.00	120.00	-		
Hodgson, Lisa	Warehouse Operative	0	0.00	-		

The interface also shows a search bar for sites, with a dropdown list of sites including 'Agency_1 HQ', 'ARGOS Home Delivery DHL / Acton Gate - Transport', 'ARGOS Home Delivery DHL / Acton Gate - Warehouse', 'ARGOS Home Delivery DHL / Argos Aberdeen Transport', 'ARGOS Home Delivery DHL / Argos Aberdeen Warehouse', 'ARGOS Home Delivery DHL / Carlisle', 'KAM / KAM Peterborough', and 'UAT Client / UAT Site'.

How To Add An Historic Adjustment?

To add an historic adjustment, click on the worker you require to make the adjustment to and open the timesheet.



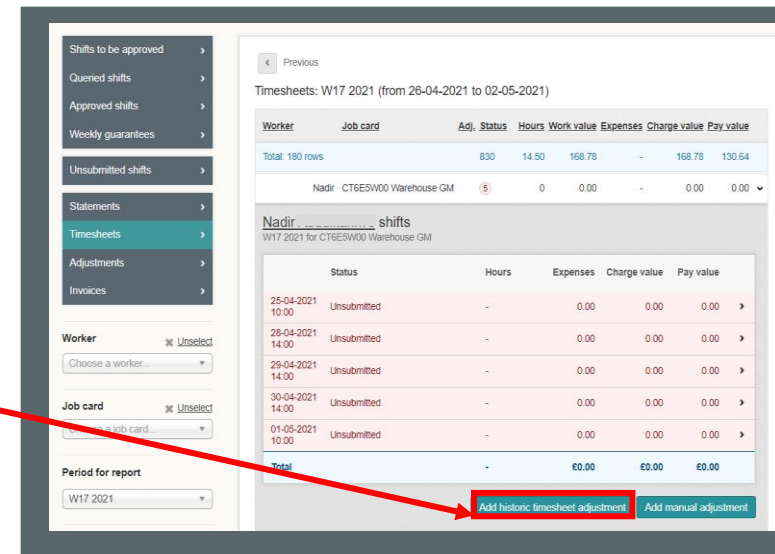
Shifts to be approved >
Queried shifts >
Approved shifts >
Weekly guarantees >
Unsubmitted shifts >
Statements >
Timesheets >
Adjustments >

← Previous

Timesheets: W17 2021 (from 26-04-2021 to 02-05-2021)

Worker	Job card	Adj. Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 180 rows			830	14.50	168.78	-	168.78 130.64
Nadir	CT6E5W00 Warehouse GM	5	0	0.00	-	0.00	0.00 >
Julie	CT6E5W00 Warehouse GM	3	0	0.00	-	0.00	0.00 >
, Ghulam	CT6E5W00 Warehouse GM	5	0	0.00	-	0.00	0.00 >

Next click on **Add historic timesheet adjustment**



Shifts to be approved >
Queried shifts >
Approved shifts >
Weekly guarantees >
Unsubmitted shifts >
Statements >
Timesheets >
Adjustments >
Invoices >

← Previous

Timesheets: W17 2021 (from 26-04-2021 to 02-05-2021)

Worker	Job card	Adj. Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 180 rows			830	14.50	168.78	-	168.78 130.64
Nadir	CT6E5W00 Warehouse GM	5	0	0.00	-	0.00	0.00 >

Nadir shifts
W17 2021 for CT6E5W00 Warehouse GM

Status	Hours	Expenses	Charge value	Pay value
25-04-2021 10:00 Unsubmitted	-	0.00	0.00	0.00 >
28-04-2021 14:00 Unsubmitted	-	0.00	0.00	0.00 >
29-04-2021 14:00 Unsubmitted	-	0.00	0.00	0.00 >
30-04-2021 14:00 Unsubmitted	-	0.00	0.00	0.00 >
01-05-2021 10:00 Unsubmitted	-	0.00	0.00	0.00 >
Total	-	£0.00	£0.00	£0.00

Worker % Unselect
Choose a worker...

Job card % Unselect
Choose a job card...

Period for report
W17 2021

Add historic timesheet adjustment Add manual adjustment

How To Add An Adjustment To The Relevant Week?

When adding an adjustment for a historic week you must ensure you are on the week you need to pay and the week the payment was missing from.

Job card: CT6E5W00 Warehouse GM
Worker: Nadir
Historic week: W16 / 2021
Adjustment week: W17 - 2021

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 11.64 Pay: £ 9.01	<input type="checkbox"/>	0	7.25	7.25	7.25	7.25	7.25	0	36.25	Standard rates
Chrg: £ 16.03 Pay: £ 12.01	<input checked="" type="checkbox"/>	0	0	0	0	0	0	8.58	8.58	Standard rates

+ Add rate band

Original (total)	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
0	7.25	7.25	7.25	7.25	7.25	7.25	8.58	44.83
Adjustment (total)	0	0	0	0	0	0	0	0
Original + Adjustment (total)	0	7.25	7.25	7.25	7.25	7.25	8.58	44.83

Expenses

Chrg.	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00
Pay	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00

Cancel Save

Adjustment week is the current week that you are payrolling.

Historic week is the week you need to pay the worker.

Click on the relevant week for the Historic Adjustment.

How To Add In The Charge And Pay Rate Difference?

Next, we need to add the rate band which will bring up charge rate and the pay rate for processing the hours. **You must ensure a charge rate is processed and not just a pay only.**

Now add the difference of the charge rate and the pay rate. You can work this out by the difference between the **New Pay Rate** and **Old Pay Rate**. Then do the same with the charge rate.

The screenshot shows the 'Rates' table with the following data:

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 11.64	<input type="checkbox"/>	0	0	7.25	7.25	7.25	7.25	0	29	Standard rates
Pay: £ 9.01										
+ Add rate band										
Original (total)		0	0	7.25	7.25	7.25	7.25	0	29	
Adjustment (total)		0	0	0	0	0	0	0	0	
Original + Adjustment (total)		0	0	7.25	7.25	7.25	7.25	0	29	
Expenses										
Chrg.		£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	
Pay		£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	

Below the table, there is a section for 'Chrg' and 'Pay' rates with input fields. The 'Chrg' field is set to £ 0.00 and the 'Pay' field is set to £ 0.00. A red arrow points to the 'Chrg' field.

On the right, a smaller screenshot shows the 'Rates' table with the following data:

Rates
Chrg: £ 12.57
Pay: £ 9.68
Chrg: £ 2.13
Pay: £ 1.78

A red arrow points from the text 'Now add the difference of the charge rate and the pay rate...' to the 'Chrg: £ 2.13' row in this smaller table.

Job card

Milk Production Days G3

Worker

Gidane

Historic week

W17 / 2021

Adjustment week

W18 - 2021

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
<div>Chrg: £ 12.57</div> <div>Pay: £ 9.68</div>	<input type="checkbox"/>	0	11.5	11.5	0	0	0	0	23	Standard rates
<div>Chrg: £ 2.13</div> <div>Pay: £ 1.78</div>	<input type="checkbox"/>	0	11.50	11.50	0	0	0	0	23	Missed pay (basic)
+ Add rate band										
Original (total)		0	11.5	11.5	0	0	0	0	23	
Adjustment (total)		0	11.5	11.5	0	0	0	0	23	
Original + Adjustment (total)		0	23	23	0	0	0	0	46	
Expenses	Chrg.	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	
	Pay	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	

Cancel

Save

How To Add In Standard Rate Information?

Once with have opened the edit adjustment section, you need to select either Missed pay (basic), Missed pay (overtime), Adjustment rate or Adjustment Rate Overtime **ONLY**.

Next click on **Adjusted Rate** or if overtime adjustment click **Adjusted Rate OT**.

This will be on your drop down.

Job card: CT6ESW00 Warehouse GM, Worker: Nadir, Historic week: W12 / 2021, Adjustment week: W17 - 2021

Adjustment type: **Adjusted Rate**

Save

Edit Adjustment Type

Adjustment type: **Adjusted Rate OT**

Cancel Save

Next click on the reason and

Save

How To Check Before Saving?

We have now added all the information to save the adjustment. Next, we need to check to ensure the information is correct.

Job card: CT6E5W00 Warehouse GM
Worker: , Nadir

Historic week: W12 / 2021
Adjustment week: W17 - 2021

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 12.57 Pay: £ 9.68	<input type="checkbox"/>	0	11.5	11.5	0	0	0	0	23	Standard rates
Chrg: £ 2.13 Pay: £ 1.79	<input type="checkbox"/>	0	11.50	11.50	0	0	0	0	23	Adjusted Rate
+ Add rate band										
Original (total)		0	0	7.25	7.25	7.25	7.25	0	29	
Adjustment (total)		0	7.25	0	0	0	0	0	7.25	
Original + Adjustment (total)		0	7.25	7.25	7.25	7.25	7.25	0	36.25	
Expenses										
Chrg.		£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	
Pay		£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	

Cancel Save

Correct Adjustment week of payment ✓

Correct Historic week of payment ✓

Correct Charge & Pay Rate Difference ✓

Correct Hours ✓

Correct reason ✓

Then click on **Save**

If you have inputted anything incorrect you will see the below message appear.

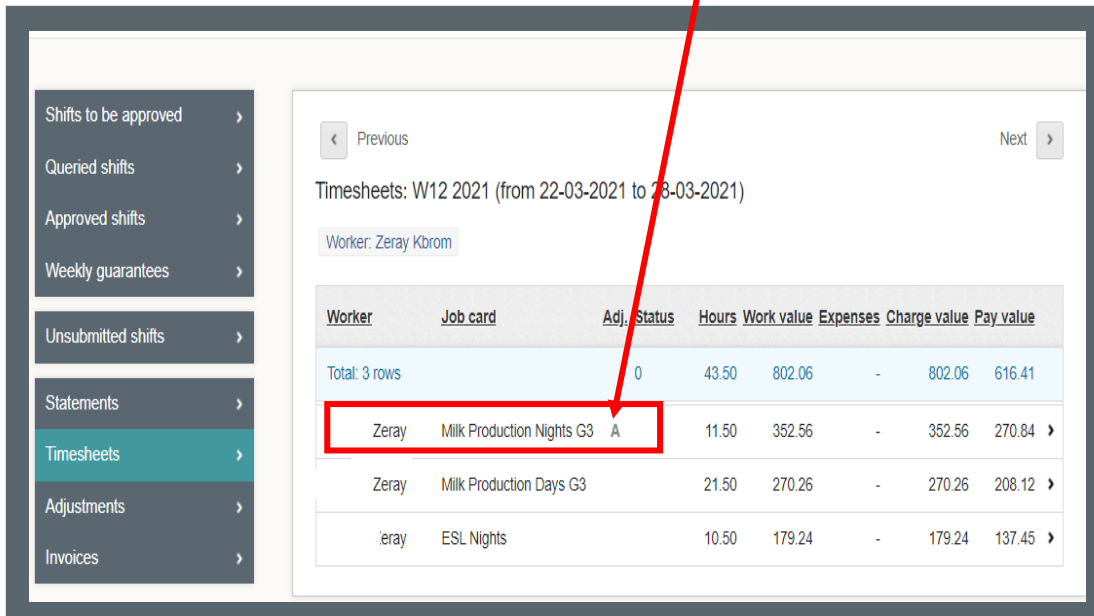
Adjusted Rate is used if the pay rate is below NMW, please use Missed Pay for pay rates above NMW (above minimum rate on the job card)

How To View The Adjustment In Timesheets?

The Adjustment has now been processed and there are two ways of finding the adjustment.

The first one is allocated on the timesheet ^A

When you open the timesheet, you will see the adjustment.



Shifts to be approved >

Queried shifts >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts >

Statements >

Timesheets >

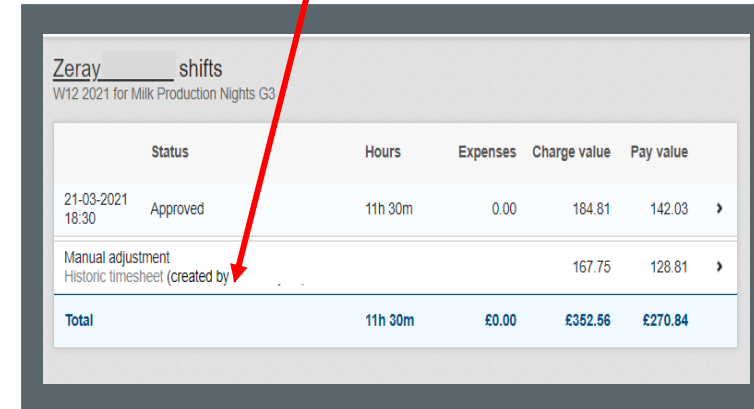
Adjustments >

Invoices >

Timesheets: W12 2021 (from 22-03-2021 to 28-03-2021)

Worker: ZeraY Kbrom

Worker	Job card	Adj.	Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 3 rows		0		43.50	802.06	-	802.06	616.41
ZeraY	Milk Production Nights G3	A		11.50	352.56	-	352.56	270.84
ZeraY	Milk Production Days G3			21.50	270.26	-	270.26	208.12
ZeraY	ESL Nights			10.50	179.24	-	179.24	137.45



ZeraY shifts

W12 2021 for Milk Production Nights G3

Status	Hours	Expenses	Charge value	Pay value
21-03-2021 18:30 Approved	11h 30m	0.00	184.81	142.03
Manual adjustment Historic timesheet (created by ...)			167.75	128.81
Total	11h 30m	£0.00	£352.56	£270.84

How To View The Adjustment In Adjustments?

The second way is to go to timesheets and on the left side you will see adjustments.

When you open the timesheet, you will see the adjustment. If required, you can adjust from here by clicking

Edit historic timesheet adjustment

The first screenshot shows the main menu on the left with 'Adjustments' highlighted in red. A dropdown menu is open, showing options like 'Weekly guarantees', 'Unsubmitted shifts', 'Statements', 'Timesheets', 'Invoices', 'Site locks', and 'Site level approvals'. 'Invoices' is highlighted in red.

The second screenshot shows the 'Adjustments' section with a table of adjustments. The table has columns for 'Worker', 'Job card', 'Charge value', and 'Pay value'. A row for 'eray' with 'Milk Production Nights G3' is highlighted in red. A red box labeled 'Edit historic timesheet adjustment' is positioned above this row.

The third screenshot shows the 'Historic timesheet adjustment breakdown' section. It has a table with columns for 'Week', 'Charge', and 'Pay'. A row for 'Week 07 2021' is highlighted in red. A red box labeled 'Edit historic timesheet adjustment' is positioned below this row.

Worker	Job card	Charge value	Pay value
Total: 1 rows			
eray	Milk Production Nights G3	167.75	128.81

Week	Charge	Pay
Total: 1 rows		
Week 07 2021	167.75	128.81

HISTORIC ADJUSTED MISSING HOURS

What Is An Historic Adjustment?

An historic adjustment is where we have missed payment for a worker. It might be basic hours, overtime or backpay. This is the **correct** way to process missing payments and **not through manual adjustment**.

Click on Finance>Timesheets and then search for your site.

The image shows two screenshots of the DatumRPO web application interface. The top screenshot shows the 'Finance' menu open, with 'Timesheets' highlighted. The bottom screenshot shows the 'Timesheets' page with a search bar and a list of sites.

Top Screenshot: Finance Menu

- Shifts to be approved
- Queried shifts
- Approved shifts
- Weekly guarantees
- Unsubmitted shifts
- Statements
- Timesheets**
- Invoices
- Site locks

Bottom Screenshot: Timesheets Page

Search for sites...

- Agency_1 / HQ
- ARGOS Home Delivery DHL / Acton Gate - Transport
- ARGOS Home Delivery DHL / Acton Gate - Warehouse**
- ARGOS Home Delivery DHL / Argos Aberdeen Transport
- ARGOS Home Delivery DHL / Argos Aberdeen Warehouse
- ARGOS Home Delivery DHL / Carlisle
- KAM / KAM Peterborough
- UAT Client / UAT Site

Worker	Hours	Work value	Expenses	Charge value	Pay value
Total: 23 rows	171.03	2,058.90	-	-	-
Bell, Sarah - Warehouse Operative	8.00	96.00	-	-	-
Demo, Dan - Warehouse Operative	8.28	99.40	-	-	-
Harris, Ian - Warehouse Operative	0	0.00	-	-	-
Hodgson, Lisa - Van Driver	10.00	120.00	-	-	-
Hodgson, Lisa - Warehouse Operative	0	0.00	-	-	-

How To Add An Historic Adjustment?

To add an historic adjustment, click on the worker you require to make the adjustment to and open the timesheet.

Shifts to be approved >
Queried shifts >
Approved shifts >
Weekly guarantees >
Unsubmitted shifts >
Statements >
Timesheets >
Adjustments >

← Previous

Timesheets: W17 2021 (from 26-04-2021 to 02-05-2021)

Worker	Job card	Adj. Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 180 rows			830	14.50	168.78	-	168.78 130.64
Nadir	CT6E5W00 Warehouse GM	5	0	0.00	-	0.00	0.00 >
Julie	CT6E5W00 Warehouse GM	3	0	0.00	-	0.00	0.00 >
Ghulam	CT6E5W00 Warehouse GM	5	0	0.00	-	0.00	0.00 >

Next click on **Add historic timesheet adjustment**

Shifts to be approved >
Queried shifts >
Approved shifts >
Weekly guarantees >
Unsubmitted shifts >
Statements >
Timesheets >
Adjustments >
Invoices >

← Previous

Timesheets: W17 2021 (from 26-04-2021 to 02-05-2021)

Worker	Job card	Adj. Status	Hours	Work value	Expenses	Charge value	Pay value
Total: 180 rows			830	14.50	168.78	-	168.78 130.64
Nadir CT6E5W00 Warehouse GM 5 0 0.00 - 0.00 0.00 >							

Nadir shifts
W17 2021 for CT6E5W00 Warehouse GM

Status	Hours	Expenses	Charge value	Pay value
25-04-2021 10.00 Unsubmitted	-	0.00	0.00	0.00 >
28-04-2021 14.00 Unsubmitted	-	0.00	0.00	0.00 >
29-04-2021 14.00 Unsubmitted	-	0.00	0.00	0.00 >
30-04-2021 14.00 Unsubmitted	-	0.00	0.00	0.00 >
01-05-2021 10.00 Unsubmitted	-	0.00	0.00	0.00 >
Total	-	£0.00	£0.00	£0.00

Worker % Unselect
Choose a worker... >

Job card % Unselect
Choose a job card... >

Period for report
W17 2021 >

Add historic timesheet adjustment Add manual adjustment

How To Add An Adjustment To The Relevant Week?

When adding an adjustment for a historic week you must ensure you are on the week you need to pay and the week the payment was missing from.

Job card
CT6E5W00 Warehouse GM

Worker
Nadir

Historic week
W16 / 2021

Adjustment week
W17 - 2021

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 11.64 Pay: £ 9.01	<input type="checkbox"/>	0	7.25	7.25	7.25	7.25	7.25	0	36.25	Standard rates
Chrg: £ 16.03 Pay: £ 12.01	<input checked="" type="checkbox"/>	0	0	0	0	0	0	8.58	8.58	Standard rates
+ Add rate band										
Original (total)		0	7.25	7.25	7.25	7.25	7.25	8.58	44.83	
Adjustment (total)		0	0	0	0	0	0	0	0	
Original + Adjustment (total)		0	7.25	7.25	7.25	7.25	7.25	8.58	44.83	
Expenses	Chrg.	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00
	Pay	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00

Cancel
Save

Adjustment week is the current week that you are payrolling.

Historic week is the week you need to pay the worker.

Click on the relevant week for the Historic Adjustment.

How To Add In The Charge And Pay Rate?

Next, we need to add the rate band which will bring up charge rate and the pay rate for processing the hours. You must ensure a charge rate is processed and not just a pay only.

Job card: CT6E5W00 Warehouse GM
Worker: Nadir
Historic week: W12 / 2021
Adjustment week: W17 - 2021

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 11.64	<input type="checkbox"/>	0	0	7.25	7.25	7.25	7.25	0	29	Standard rates
Pay: £ 9.01	<input type="checkbox"/>									
+ Add rate band										
Original (total)		0	0	7.25	7.25	7.25	7.25	0	29	
Adjustment (total)		0	0	0	0	0	0	0	0	
Original + Adjustment (total)		0	0	7.25	7.25	7.25	7.25	0	29	
Expenses										
Chrg.		£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	
Pay		£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	

Now add in the charge rate and the pay rate.

Rates	OT
Chrg: £ 11.64	<input type="checkbox"/>
Pay: £ 9.01	<input type="checkbox"/>
Chrg: 11.64	<input type="checkbox"/>
Pay: £ 9.01	<input type="checkbox"/>

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 11.64	<input type="checkbox"/>	0	0	7.25	7.25	7.25	7.25	0	29	Standard rates
Pay: £ 9.01	<input type="checkbox"/>									
Chrg: £ 0.00	<input type="checkbox"/>	0	0	0	0	0	0	0	0	
Pay: £ 0.00	<input type="checkbox"/>									
+ Add rate band										

Missed pay (basic) ✕

How To Add In The Hours?

Now we have added the charge and pay rate we now need to add the hours in the correct day of which the hours were missing.

Job card

Worker

Historic week

Adjustment week

CT6E5W00 Warehouse GM

, Nadir

W12 / 2021

W17 - 2021

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 11.64 Pay: £ 9.01	<input type="checkbox"/>	0	0	7.25	7.25	7.25	7.25	0	29	Standard rates
Chrg: £ 11.64 Pay: £ 9.01	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="7.25"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	7.25	Missed pay (basic)
+ Add rate band										
Original (total)		0	0	7.25	7.25	7.25	7.25	0	29	
Adjustment (total)		0	7.25	0	0	0	0	0	7.25	
Original + Adjustment (total)		0	7.25	7.25	7.25	7.25	7.25	0	36.25	
Expenses	Chrg.	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	
	Pay	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	

Cancel

Save

Next, click on **Missed pay** and add in the reason (if missed pay (basic) you don't need to click and change).

This will then bring up a drop down to select reason.

Please correct the errors listed below:
One or more of the rate rows has no hours assigned yet

How To Add In Standard Rate Information?

Once you have opened the Edit Adjustment you need to select either Missed pay (basic), Missed pay (overtime), Adjustment Rate or Adjustment Rate Overtime **ONLY**.

The screenshot shows the 'Edit Adjustment Type' dialog box. The 'Adjustment type' dropdown menu is open, and 'Missed pay (basic)' is selected. The background shows a table with rates and a 'Save' button.

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 11.64		0	0						29	Standard rates
Pay: £ 9.01										
Chrg: £ 11.64		0	7.25						7.25	Missed pay (basic)
Pay: £ 9.01										
Original (total)		0	0							
Adjustment (total)		0	7.25						7.25	
Original + Adjustment (total)		0	7.25						36.25	
Expenses	Chrg.	£ 0.00	£ 0.00						£ 0.00	
	Pay	£ 0.00	£ 0.00						£ 0.00	

Next click on the reason and

The screenshot shows the 'Edit Adjustment Type' dialog box. The 'Adjustment type' is set to 'Missed pay (overtime)' and the 'Invoice description' is set to 'SR01'. The 'Save' button is highlighted with a red box and a red arrow.

How To Check Before Saving?

We have now added all the information to save the adjustment. Next, we need to check to ensure the information is correct.

Job card: CT6E5W00 Warehouse GM Worker: , Nadir

Historic week: W12 / 2021 Adjustment week: W17 - 2021

Rates	OT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Type
Chrg: £ 11.64 Pay: £ 9.01	<input type="checkbox"/>	0	0	7.25	7.25	7.25	7.25	0	29	Standard rates
Chrg: £ 11.64 Pay: £ 9.01	<input type="checkbox"/>	0	7.25	0	0	0	0	0	7.25	Missed pay (basic)
+ Add rate band										
Original (total)		0	0	7.25	7.25	7.25	7.25	0	29	
Adjustment (total)		0	7.25	0	0	0	0	0	7.25	
Original + Adjustment (total)		0	7.25	7.25	7.25	7.25	7.25	0	36.25	
Expenses	Chrg.	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	
	Pay	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	

Cancel Save

Correct Adjustment week of payment ✓

Correct Historic week of payment ✓

Correct Charge & Pay Rate ✓

Correct Hours ✓

Correct reason ✓

Then click on **Save**

If you have inputted anything incorrect you will see the below message appear.

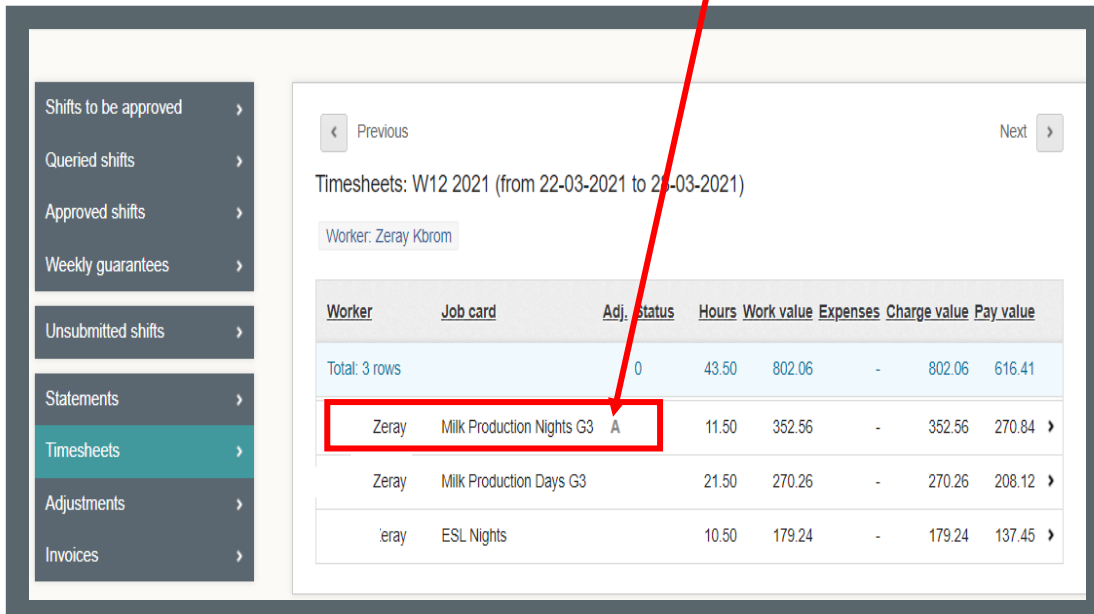
Adjusted Rate is used if the pay rate is below NMW, please use Missed Pay for pay rates above NMW (above minimum rate on the job card) x

How To View The Adjustment In Timesheets?

The Adjustment has now been processed and there are two ways of finding the adjustment.

The first one is allocated on the timesheet ^A

When you open the timesheet, you will see the adjustment.



Shifts to be approved >

Queried shifts >

Approved shifts >

Weekly guarantees >

Unsubmitted shifts >

Statements >

Timesheets >

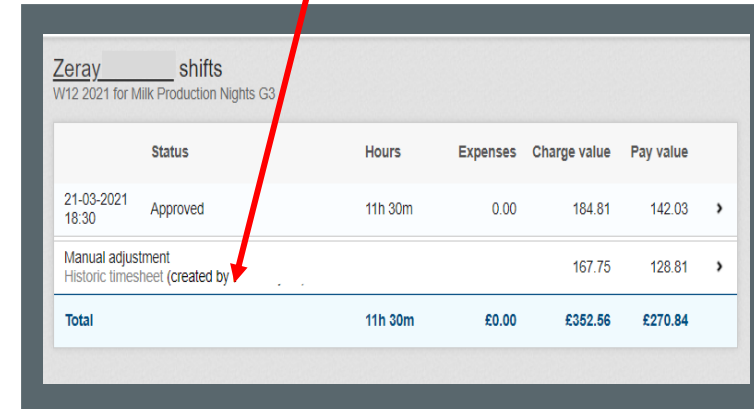
Adjustments >

Invoices >

Timesheets: W12 2021 (from 22-03-2021 to 28-03-2021)

Worker: Zera Y Kbrom

Worker	Job card	Adj. status	Hours	Work value	Expenses	Charge value	Pay value
Total: 3 rows			0	43.50	802.06	-	802.06 616.41
Zera Y	Milk Production Nights G3	A	11.50	352.56	-	352.56	270.84 >
Zera Y	Milk Production Days G3		21.50	270.26	-	270.26	208.12 >
Zera Y	ESL Nights		10.50	179.24	-	179.24	137.45 >



Zera Y shifts

W12 2021 for Milk Production Nights G3

Status	Hours	Expenses	Charge value	Pay value
21-03-2021 18:30 Approved	11h 30m	0.00	184.81	142.03 >
Manual adjustment Historic timesheet (created by ...)			167.75	128.81 >
Total	11h 30m	£0.00	£352.56	£270.84

How To View The Adjustment In Adjustments?

The second way is to go to timesheets and on the left side you will see adjustments.

When you open the timesheet, you will see the adjustment. If required, you can adjust here by clicking

Edit historic timesheet adjustment

The first screenshot shows the 'Finance for' sidebar with 'Adjustments' highlighted in red. A dropdown menu is open, also with 'Adjustments' highlighted in red.

The second screenshot shows the 'Adjustments: W12 2021 (from 22-03-2021 to 28-03-2021)' table. The first row, for worker 'eray' and job card 'Milk Production Nights G3', is highlighted in red.

The third screenshot shows the 'Historic timesheet adjustment breakdown' for the selected row. The 'Edit historic timesheet adjustment' button is highlighted in red.

Worker	Job card	Charge value	Pay value
Total: 1 rows		167.75	128.81
eray	Milk Production Nights G3	167.75	128.81

Week	Charge	Pay
Week 07 2021	167.75	128.81

SITE LOCKS

When Is The Deadline For Locking Sites?

DEADLINE FOR LOCKING SITES IS:

MONDAY

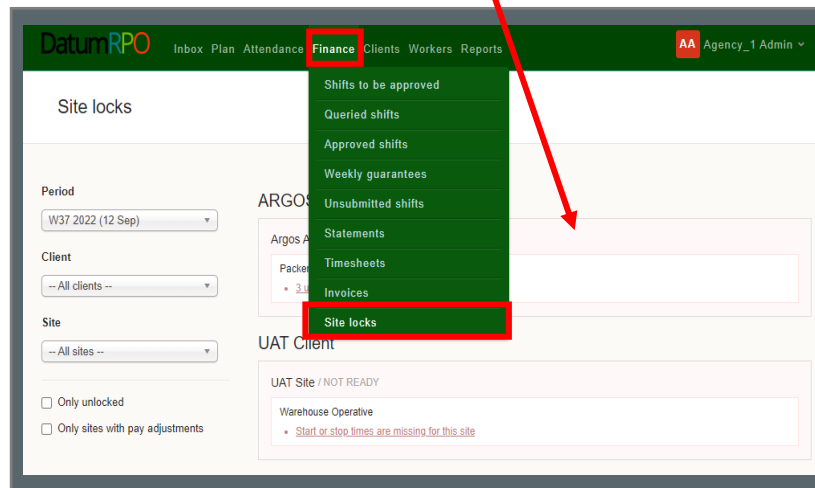
2PM

If you don't lock or advise of an issue the site will be locked for you which could result in workers not being paid.

What Do I Need To Check Before I Lock Site?

Site Locks is the final process before you complete payroll. Once you lock the site you are not able to do anything if you find something wrong. It is important that you do your checks before finalising.

Go to Finance and back to your timesheet page.



You need to check your hours and charge rates match.

The screenshot shows the 'Timesheets' page in DatumRPO. A red box highlights the table header and the first row of data. The table has columns: Worker, Job card, Adj, Status, Hours, Work.value, Expenses, Charge.value, and Pay.value. The first row shows a total of 4 rows with 0 adjustments, 111.50 hours, and a work value of 1,314.25. Below the table, there are filters for 'Worker' (Test76899Sha), 'Job card' (sJobCardTestEdda406), and 'Period for report' (W16 2021). There is also a checkbox for 'Hide historic adjustments' and a button for 'Add historic adjustment'.

Worker	Job card	Adj	Status	Hours	Work.value	Expenses	Charge.value	Pay.value
Total: 4 rows		0		111.50	1,314.25	-	1,314.25	1,162.25
A. Test76899Sha	sJobCardTestEdda406	28.00		308.00	-	308.00	280.00	
A. Test 7689 V8	sJobCardTestEdda406	22.50		252.00	-	252.00	229.50	
Kopkyxnm, Test	sJobCardTestEdda406	33.75		452.25	-	452.25	378.00	

Where To Find Period (Week), Division And Client?

Next you will need to add your Period. This is the **week** of payroll you are processing, **division** which your **client** sits under and then find your client.

The image displays three overlapping screenshots of the 'Site locks' interface in DatumRPO, illustrating the steps to select the Period, Division, and Client. Red arrows point from the text above to the corresponding fields in the screenshots.

- Period:** The first screenshot shows the 'Period' dropdown menu open, displaying a list of weeks. 'Week 18 2021 (3 May)' is selected.
- Division:** The second screenshot shows the 'Division' dropdown menu open, displaying a list of divisions. 'Driving' is selected.
- Client:** The third screenshot shows the 'Client' dropdown menu open, displaying a list of clients. 'TestClientCixhhsalaon' is selected.

The interface also shows the 'TestSiteRrol670 / READY TO LOCK' status and a 'Get report' link.

Where To Generate Your Lock Report?

Click on get report and this will then generate a CSV report.

Site locks

Period

Week 18 2021 (3 May)

Division

Driving

Client

TestClientCixhhslaon

TestClientCixhhslaon

TestSiteRrol670 / READY TO LOCK

[Get report](#)

Lock...

☐ Only unlocked

☐ Only sites with pay adjustments

The report will show you
Worker, Workers ID, Job Card, Hours,
Pay Rate, Charge Rate, Total Pay and
Total Charge.

This will enable you to do a final check before locking your payroll.

Employer	Division	Consultar	Candidate	Original	Candidate	Employment	Week Start	Week End	Client Org	Job Project	Job Id	Job Ref	Job Type	Timesheet	Hours Worked	Time Rate	Rate Code	Pay Rate	Charge Rate	Customer	Customer	Pension	C Apprentice	Holiday A	Invoice D	Pay Subt	Charge Sub	Client clo
SL	DR	1.7E+08	6.4E+08	6.4E+08	Test7689/A	PAYE	2E+07	2E+07		10IT	6.3E+08	s/JobCard Driver	6.4E+08	2	BASE_RATE	Y	10	11	6.3E+08	testsiterr	1	1	28	Basic pay	280	308		
SL	DR	1.7E+08	6.3E+08	6.3E+08	Test Kxjkkyyxnn	PAYE	2E+07	2E+07		10IT	6.3E+08	s/JobCard Driver	6.4E+08	2	BASE_RATE	Y	11	13	6.3E+08	testsiterr	1	1	28	Basic pay	297	351		
SL	DR	1.7E+08	6.3E+08	6.3E+08	Test Kxjkkyyxnn	PAYE	2E+07	2E+07		10IT	6.3E+08	s/JobCard Driver	6.4E+08	6.7	OT_RATE	N	12	15	6.3E+08	testsiterr	1	1	0	Overtime	81	101.25		
SL	DR	1.7E+08	6.4E+08	6.4E+08	Test 7689/A	PAYE	2E+07	2E+07		10IT	6.3E+08	s/JobCard Driver	6.4E+08	1	BASE_RATE	Y	10	11	6.3E+08	testsiterr	1	1	28	Basic pay	180	198		
SL	DR	1.7E+08	6.4E+08	6.4E+08	Test 7689/A	PAYE	2E+07	2E+07		10IT	6.3E+08	s/JobCard Driver	6.4E+08	4	OT_RATE	N	11	12	6.3E+08	testsiterr	1	1	0	Overtime	49.5	54		
SL	DR	1.7E+08	6.4E+08	6.4E+08	Test7689/A	PAYE	2E+07	2E+07		10IT	6.3E+08	s/JobCard Driver	6.4E+08	2	BASE_RATE	Y	10	11	6.3E+08	testsiterr	1	1	28	Basic pay	250	275		
SL	DR	1.7E+08	6.4E+08	6.4E+08	Test7689/A	PAYE	2E+07	2E+07		10IT	6.3E+08	s/JobCard Driver	6.4E+08	2.2	OT_RATE	N	11	12	6.3E+08	testsiterr	1	1	0	Overtime	24.75	27		
Total																									1162.25	1314.25		

How To Lock Your Site?

You are now ready to lock your site. The final stage is to add in PO if required. There are also options to add to job card or worker.

PO for week 18 at TestSiteRrol670

Customers usually need a Purchase Order (PO) number to approve weekly spend, and automate payment.

Job cards: 1 Workers: 4

Enter Purchase Order details

- ☒ PO number is not required
- ☐ PO number for the whole site
- ☐ PO number for each job card
- ☐ PO number for each worker

Cancel **Lock**

You can now lock your site.

TestClientCixhhslaon

TestSiteRrol670 / **LOCKED**

[Get report](#) | [View POs](#)

Unlock

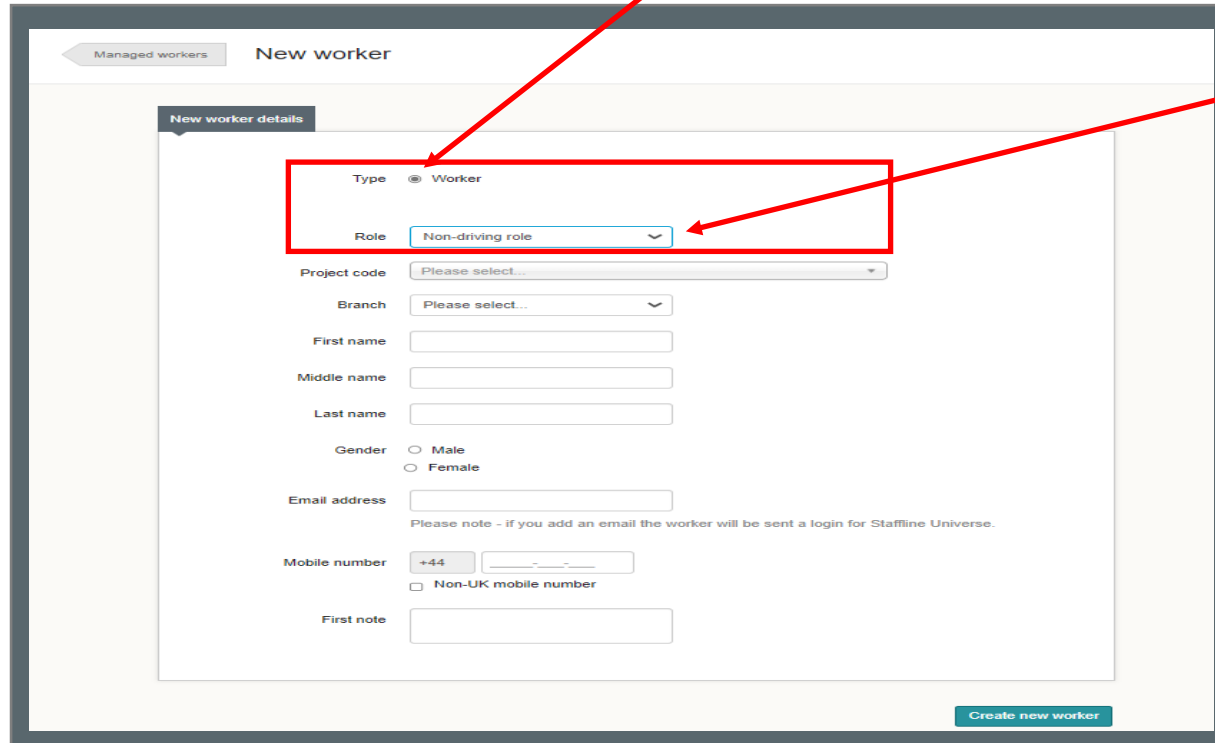
The site will go from lock to unlock.

It is forbidden to unlock a site and will not allow you to do so.

You have now completed site locks!

How To Fill Out The Workers Details?

Enter the worker's type. You need to select worker here.



Managed workers New worker

New worker details

Type ☒ Worker

Role

Project code

Branch

First name

Middle name

Last name

Gender ☐ Male ☐ Female

Email address

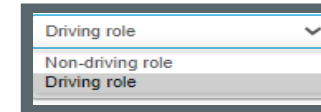
Please note - if you add an email the worker will be sent a login for Staffline Universe.

Mobile number

☐ Non-UK mobile number

First note

Create new worker



Driving role

Non-driving role

Driving role

Select the role from the dropdown.

How To Fill Out The Workers Details?

Enter the candidate's name here. 'First name' and 'Last name' must be completed, but 'Middle name' is optional.

Managed workers New worker

New worker details

Type ☒ Worker ☐ Partner agency worker

Role

Project code

Branch

First name

Middle name

Last name

Gender ☐ Male ☐ Female

Email address

Please note - if you add an email the worker will be sent a login for Staffline Universe.

Mobile number

☐ Non-UK mobile number

First note

Create new worker

Enter gender here.

How To Fill Out The Workers Details?

Managed workers New worker

New worker details

Type ☒ Worker
☐ Partner agency worker

Role

Project code

Branch

First name

Middle name

Last name

Gender ☐ Male
☐ Female

Email address

Please note - if you add an email the worker will be sent a login for Staffline Universe.

Mobile number

☐ Non-UK mobile number

First note

Create new worker

Enter their mobile number.

If Non-UK mobile number, please tick the box.

If you required to add any notes add in the First Note section

Finally press on the right hand corner to create new worker.

How To Fill Out The Workers Details?

Next, we need to complete the about you section, add date of birth and nationality.

About you

First name: Tina

Middle name:

Last name: Pyrah (Test)

Date of birth: Day Month Year

Gender: ☐ Male ☒ Female

Nationality: ☐ British ☐ Other

Photo for facial recognition: Add photo

Staffline ID: 700082000

Under notes on the top right, you will notice a message stating 'Onboarding email sent'.

Send compliance request 1 note Message worker

Add a note...

Save

About you

First name

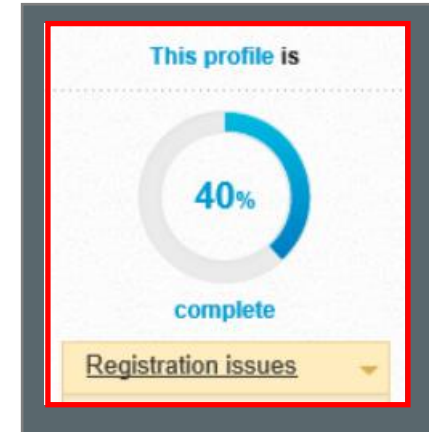
Middle name

Tina Hogan on Monday 19th April 2021 17:13
Onboarding email sent.
Prospect level: Open

How To Reduce Incomplete Profile?

Once a section is completed, the profile percentage will start to decrease until it reaches 100%. Underneath the profile percentage, it will also show issues that are outstanding with the profile.

The following sections will need to be completed so that the registration percentage reaches 100%, this way the worker can then be made compliant.



How To Complete Contact Details?

Contact details need to be verified, this will be through email and text message. If the worker doesn't confirm email address, you can skip for 30 days while you get the worker to confirm.

Contact details

Email address

123456789887@staffline.co.uk

[Change email address](#)

Skip email confirmation for 30 days

Mobile number

+44

07888-777-444

☐ Non-UK mobile number

We will use this number to send you text messages about the shifts you are working on.

Save and verify the new number

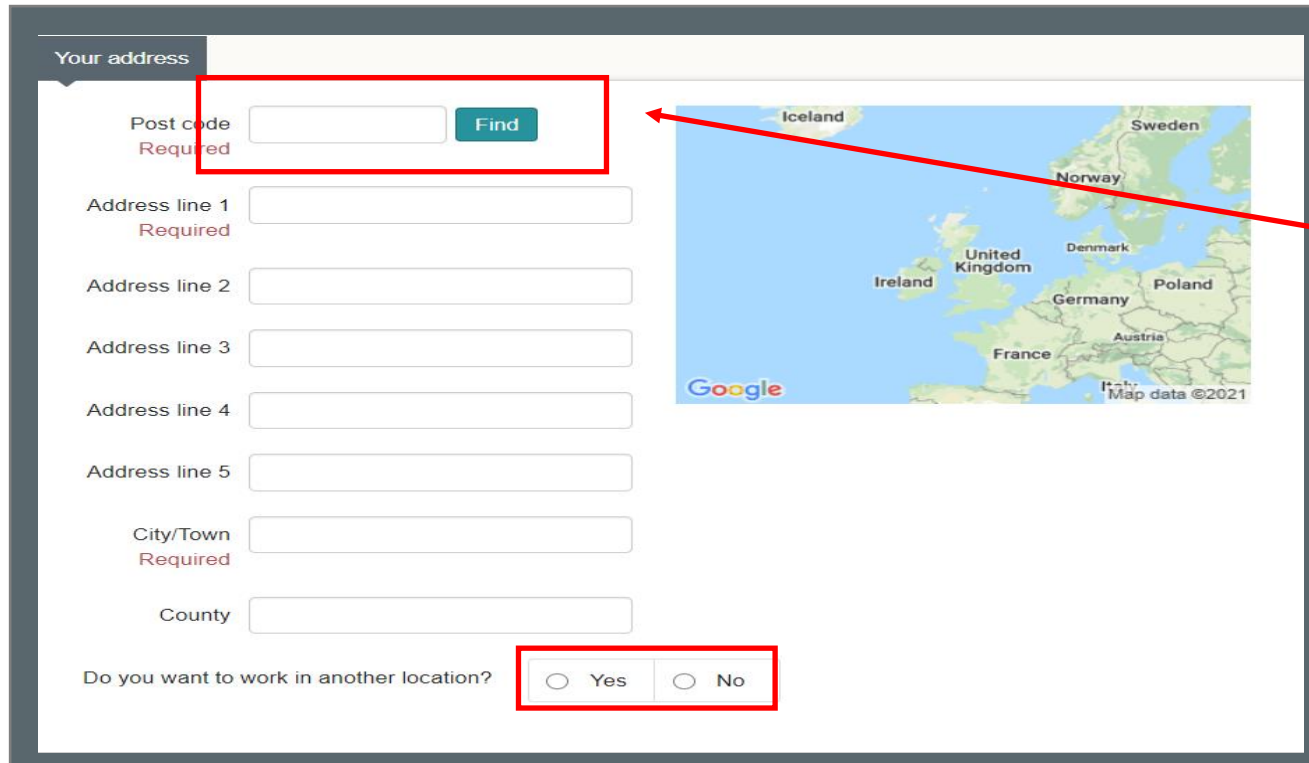
An SMS will be sent to this number.

Secondary contact number

Optional

How To Complete Your Address?

To complete the address, you can manually add in all the information or add in the post code which will give you a drop down to find the number of the house/road.



Your address

Post code
Required

Address line 1
Required

Address line 2

Address line 3

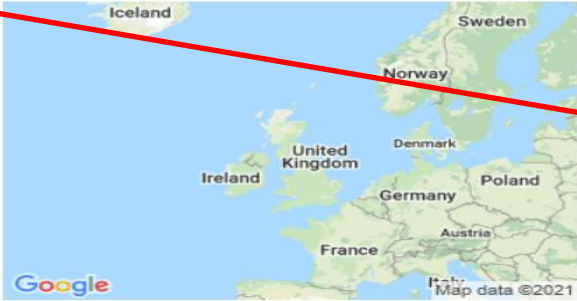
Address line 4

Address line 5

City/Town
Required

County

Do you want to work in another location? ☐ Yes ☐ No

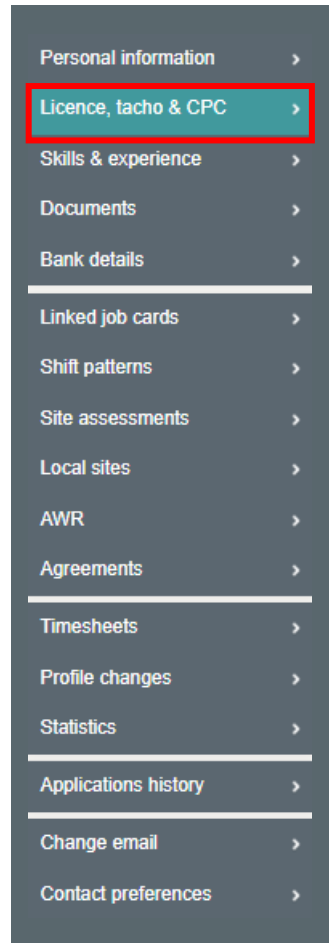


Once the address has been found press enter and this will fill out all the slots.

The worker can also be added to – Do you want to work in another location, click 'Yes' or 'No'.

How To Complete Licence?

Go to Licence, Tacho and CPC on the left-hand side of the worker's profile.

A screenshot of a web form titled 'Your licence'. The form contains several input fields: 'Country of issue' with radio buttons for 'United Kingdom' (selected) and 'Other'; 'First name on licence (if not Tina)' with a text box and the word 'Optional' below it; 'Licence number' with a text box; 'Issue number' with a text box; 'Date of issue' with three dropdown menus for Day, Month, and Year; and 'Date of expiry' with three dropdown menus for Day, Month, and Year. A red box highlights the 'Licence number' and 'Issue number' fields. A red arrow points from the text 'Entre the full name on the Licence.' to the 'Licence number' field. Below the 'Issue number' field, there is a note: 'This is the 2-3 characters found at the end of the long licence number, separated by a space'.

Please fill in the following information:

Add in the country of issue. Follow the UK guidelines for licenses. If other use the dropdown to select the country.

Entre the full name on the Licence.

Enter the Licence number on the driving Licence card

Enter the issue number.

Date of Issue.

Date of Expiry.

How To Complete Licence Categories?

Licence categories

<input type="checkbox"/> B	
<input type="checkbox"/> B+E	
<input type="checkbox"/> C	
<input type="checkbox"/> C+E	
<input type="checkbox"/> C1	
<input type="checkbox"/> C1+E	
<input type="checkbox"/> D	
<input type="checkbox"/> D1	

Licence categories

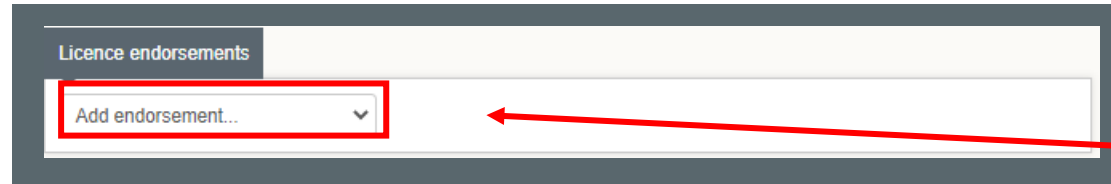
<input type="checkbox"/> B	
<input type="checkbox"/> B+E	
<input checked="" type="checkbox"/> C	<div>Valid from Day Month Year</div> <div>Valid to Day Month Year</div>
<input checked="" type="checkbox"/> C+E	<div>Valid from Day Month Year</div> <div>Valid to Day Month Year</div>
<input type="checkbox"/> C1	
<input type="checkbox"/> C1+E	
<input type="checkbox"/> D	
<input type="checkbox"/> D1	

To add a category, click on to the category that appears on the licence.

Then enter the valid date from and to.

Click on save changes.

How To Complete Licence Endorsements?

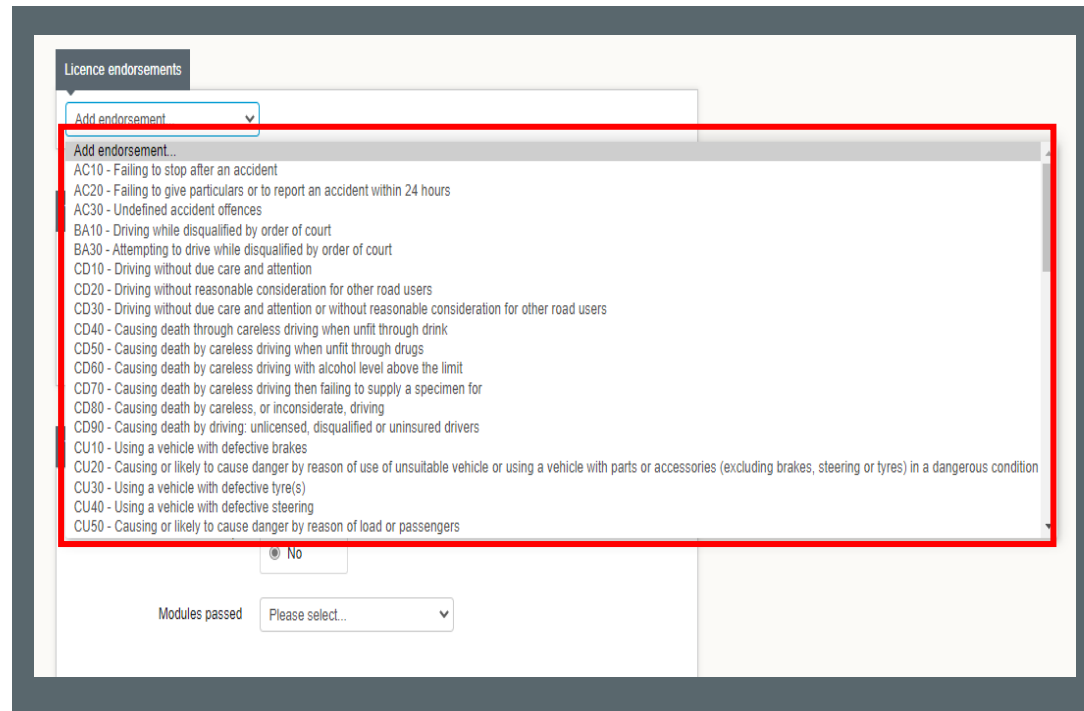


Licence endorsements

Add endorsement...

A red box highlights the 'Add endorsement...' dropdown menu. A red arrow points from the text on the right towards this dropdown.

If a worker has any endorsements on their licence, you need to make sure you add them to Universe. To find your endorsement click on the drop-down arrow to review the dropdown list.



Licence endorsements

Add endorsement...

Add endorsement...

- AC10 - Failing to stop after an accident
- AC20 - Failing to give particulars or to report an accident within 24 hours
- AC30 - Undefined accident offences
- BA10 - Driving while disqualified by order of court
- BA30 - Attempting to drive while disqualified by order of court
- CD10 - Driving without due care and attention
- CD20 - Driving without reasonable consideration for other road users
- CD30 - Driving without due care and attention or without reasonable consideration for other road users
- CD40 - Causing death through careless driving when unfit through drink
- CD50 - Causing death by careless driving when unfit through drugs
- CD60 - Causing death by careless driving with alcohol level above the limit
- CD70 - Causing death by careless driving then failing to supply a specimen for
- CD80 - Causing death by careless, or inconsiderate, driving
- CD90 - Causing death by driving: unlicensed, disqualified or uninsured drivers
- CU10 - Using a vehicle with defective brakes
- CU20 - Causing or likely to cause danger by reason of use of unsuitable vehicle or using a vehicle with parts or accessories (excluding brakes, steering or tyres) in a dangerous condition
- CU30 - Using a vehicle with defective tyre(s)
- CU40 - Using a vehicle with defective steering
- CU50 - Causing or likely to cause danger by reason of load or passengers

☒ No

Modules passed Please select...

A red box highlights the entire dropdown list of endorsements.

Once you have entered the reason you will need to fill out the dates of offence.

How To Complete Licence Endorsements?

Licence endorsements

AC20
[Remove](#)

Failing to give particulars or to report an accident within 24 hours

Date of offence
2 March 2021

Points received
6

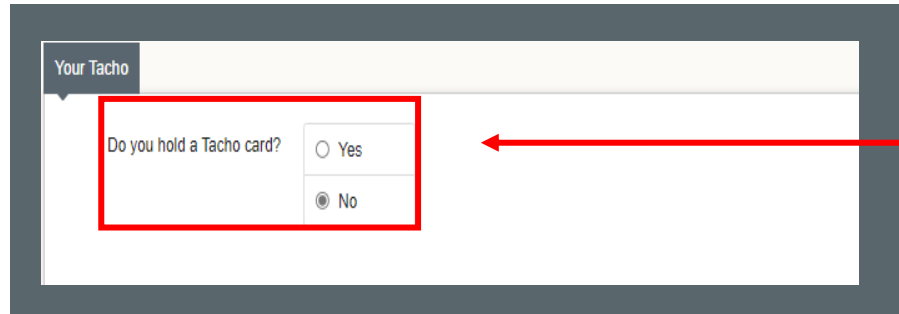
Total points: 6

Add endorsement...

Add the date of the offence and the points issued. If required add any additional endorsements.

Once completed press save change.

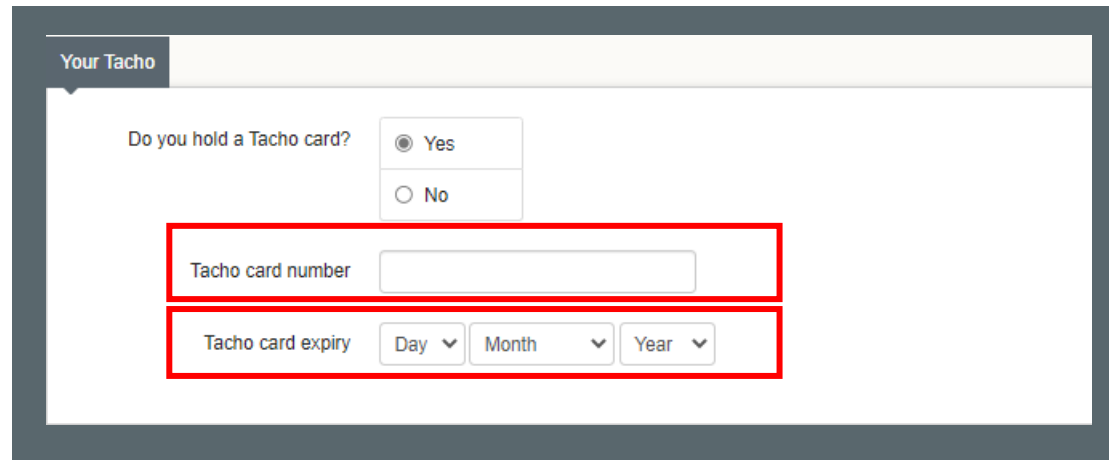
How To Complete Your Tacho?



Your Tacho

Do you hold a Tacho card? ☐ Yes ☒ No

Now we need to complete the Tacho part, if required click 'Yes'.



Your Tacho

Do you hold a Tacho card? ☒ Yes ☐ No

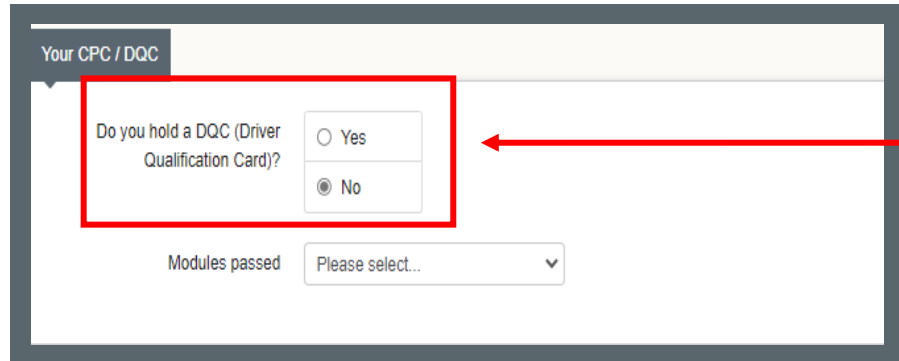
Tacho card number

Tacho card expiry Day Month Year

Next, we need to add in the Tacho number and expiry date.

Once completed press save changes.

How To Complete Your CPC/DQC?



Your CPC / DQC

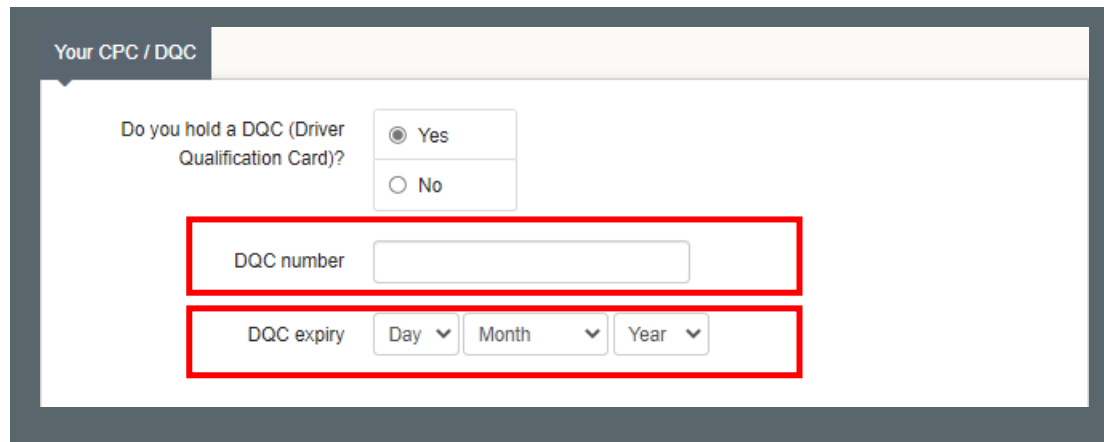
Do you hold a DQC (Driver Qualification Card)?

☐ Yes

☒ No

Modules passed Please select...

Now we need to complete the CPC/DQC part if required click on 'Yes'.



Your CPC / DQC

Do you hold a DQC (Driver Qualification Card)?

☒ Yes

☐ No

DQC number

DQC expiry Day Month Year

Add in the DQC number and expiry date.

Once completed press save changes.

How To Complete Validations For Licence And Tacho?

To validate the workers Licence And Tacho, you will need to click onto each one and validate.

Validations

Type	By	Date	Comment	Status
Driving licence	-	-	-	-
Tacho card	-	-	-	-

Click on update.

Pass the worker.
If you click fail the worker will not be able to be placed out into work. This would be a decline in the interview process.

Create validation

Validation result

☒ Pass

☐ Fail

Comment

Cancel Create validation record

Add any comments.

Click on 'Create Validation record'.

Repeat the process on the Tacho Card.
You will now see both sections have been updated and status is **Pass**.

Validations

Type	By	Date	Comment	Status
Driving licence	Tina H.	03-06-2021	-	Pass
Tacho card	Tina H.	03-06-2021	-	Pass

How To Upload Driving Licenses And Checks?

The next section to complete is the scanned document section.

Scanned documents

Documents marked do not show when the worker accesses their profile.

DVLA check document

Digicard download

Driver qualification card: front

Driver qualification card: back

Driving licence: front

Driving licence: back

Tacho card: front

Tacho card: back

DVLA check document

Not uploaded yet

Upload this document

You can drag and drop a file here... or click to select a file.

Click on the section you would like to upload DVLA checks.

You can either drag and drop the file or upload from your desktop.

Click on the section and take the expiry date from the passport/ID card.

Once you have pressed upload this file, you will see a padlock next to the selected box. This means the worker cannot delete the file.

Scanned documents

Documents marked do not show when the worker accesses their profile.

DVLA check document

Digicard download

Driver qualification card: front

Driver qualification card: back

Driving licence: front

Driving licence: back

Tacho card: front

Tacho card: back

DVLA check document

Not uploaded yet

Upload this document

File name:

Expiry date

Day Month Year

Upload this file (567 KB)

How To Complete Skills And Experience?

To complete Skill's first select a primary skill.

If you don't have a primary skill, click on the roles that they have experience on in their previous work history. You can also select other skills and sub-skills.

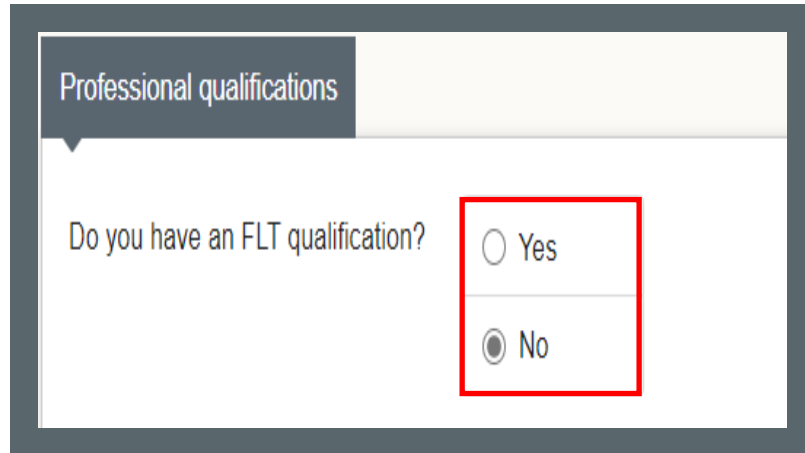
The screenshot displays the 'Skills & experience' section of a user profile. On the left is a sidebar with navigation links: Personal information, Skills & experience (highlighted), Documents, Bank details, Linked job cards, Shift patterns, Site assessments, Local sites, Agreements, Timesheets, Profile changes, Statistics, Applications history, Change email, and Contact preferences. The main content area has a 'Skills' tab selected. It features a 'Primary skill' dropdown menu (highlighted with a red box) currently showing 'Please select...'. Below this is a grid of 'Other skills' with checkboxes for LGV driver, Assembly, Labourer, Cleaning, Facilities, Food Production, Hospitality, Machine Operating, Packing, QC/Inspection, Warehouse OP/Order picking, and Fork Lift Truck Driver. A 'Professional qualifications' section asks 'Do you have an FLT qualification?' with 'Yes' and 'No' radio buttons. Below that is the 'Your employment history' section, which is currently empty and includes an 'Add an employer' button. An inset window shows the 'Primary skill' dropdown menu open, listing various skills with 'Food Production' selected and highlighted (red box). To the right of this list, the 'Food Production' skill is shown with a 'Primary' label (red box). Below the main skills list is a 'Sub-skills' section with checkboxes for 'Food Production' (highlighted with a red box) and 'Butchery'.

Once added press save changes.

How To Complete Skills And Experience?

To complete professional qualifications, select whether you have an FLT license or not.

If yes is selected, an additional box will appear with FLT qualification provider and FLT qualification date. Insert the license from the drop down and input the most recent qualification date or refresher date.

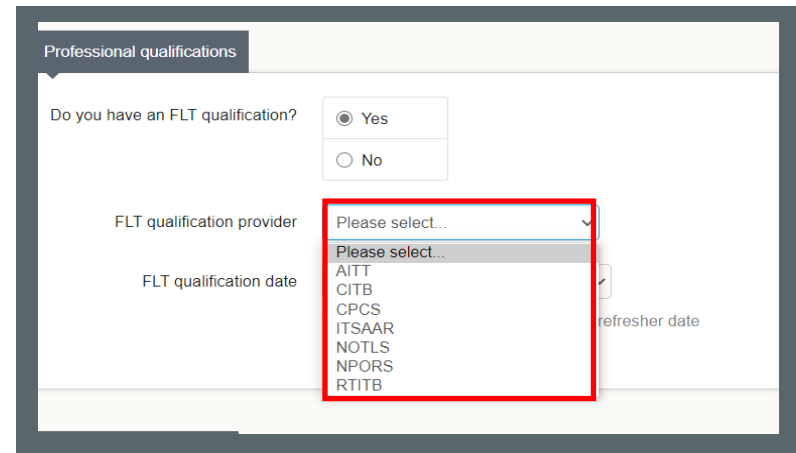


Professional qualifications

Do you have an FLT qualification?

☐ Yes

☒ No



Professional qualifications

Do you have an FLT qualification?

☒ Yes

☐ No

FLT qualification provider

Please select...

AITT

CITB

CPCS

ITSAAR

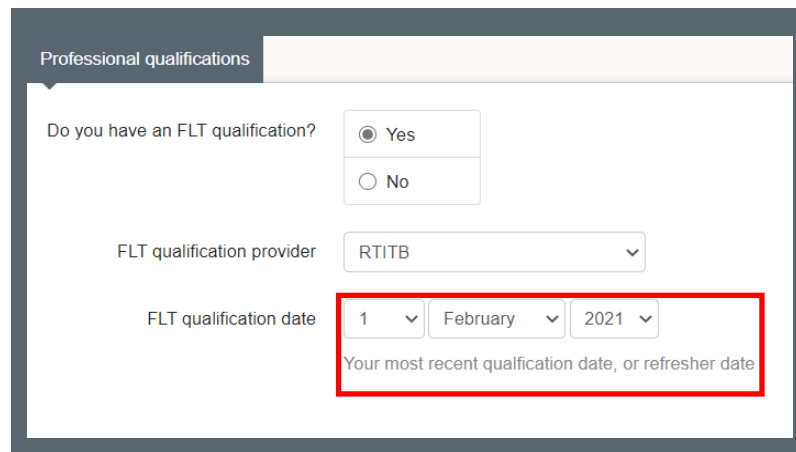
NOTLS

NPORS

RTITB

FLT qualification date

refresher date



Professional qualifications

Do you have an FLT qualification?

☒ Yes

☐ No

FLT qualification provider

RTITB

FLT qualification date

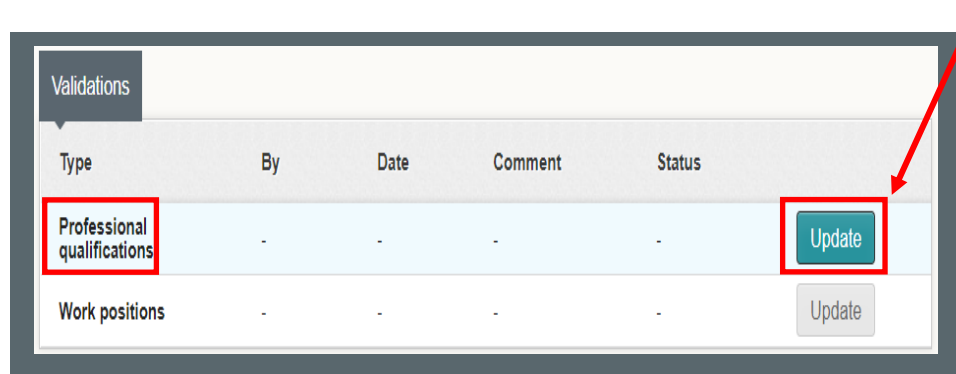
1 February 2021

Your most recent qualification date, or refresher date

Once added press save changes.

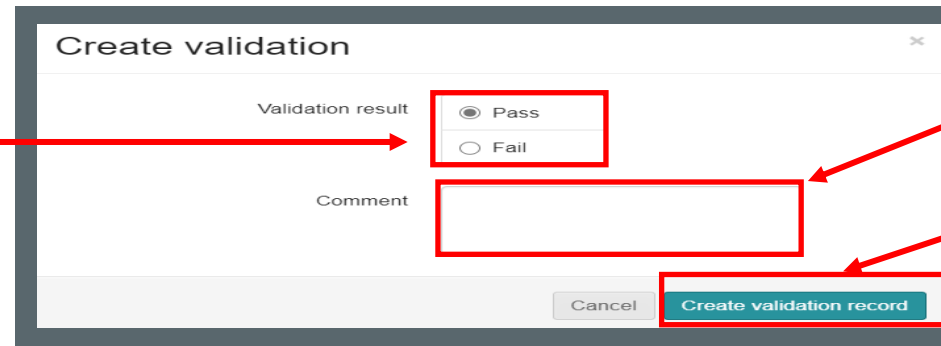
How To Complete Validations For Skills?

To validate the skills section of a worker's profile, you will need to click on each one to validate.



Type	By	Date	Comment	Status
Professional qualifications	-	-	-	-
Work positions	-	-	-	-

Pass the worker.
If you click fail the worker will not be able to be placed out into work. This would be a decline in the interview process.



Create validation

Validation result

☒ Pass
☐ Fail

Comment

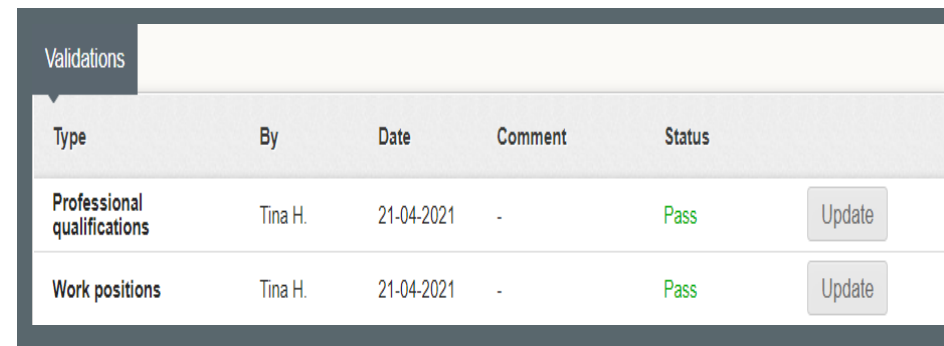
Cancel Create validation record

Add any comments

Click on
'Create
Validation record'.

Repeat the process on the work positions.

You will now see both sections have been updated
and the status is **Pass**.



Type	By	Date	Comment	Status
Professional qualifications	Tina H.	21-04-2021	-	Pass
Work positions	Tina H.	21-04-2021	-	Pass

How To Validate The Workers Personal Information And Employment Status?

This is the same process as validating the skills section, but you will have to do your check list before you click pass.

Validations				
Type	By	Date	Comment	Status
Personal information	-	-	-	-
Employment status	-	-	-	-

Click on update for personal information and employment status.

Create validation

I can confirm the following:

- All agreements have been completed and signed by the worker such as Key facts document for PAYE workers.
- The original right to work documents have been verified and uploaded.
- The worker has provided proof of their right to work in the UK.
- The ID doesn't appear to be forged or tampered with.
- The ID photograph matches the worker name, DOB and appearance.
- The bank account details, telephone number and email address have been verified.
- Evidence of their student status and term dates has been uploaded (if worker holds a student visa).

The worker's right to work documentation supporting the above statements was verified on

2021-04-21

Validation result

☒ Pass

☐ Fail

Comment

Cancel

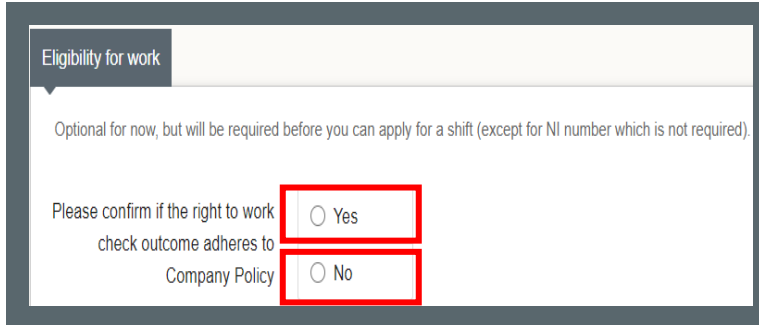
Create validation record

When confirming the validation of the worker you are confirming the following.

One happy, you can pass the worker, add a comment and then select 'Create validation record'.

How To Make The Worker Compliant?

The last requirement to enable you to place the worker onto an Induction is to confirm if the right to work check outcome adheres to company policy.



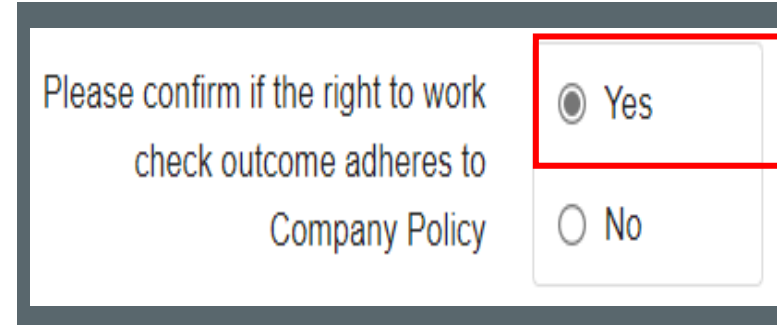
Eligibility for work

Optional for now, but will be required before you can apply for a shift (except for NI number which is not required).

Please confirm if the right to work check outcome adheres to Company Policy

☐ Yes

☐ No

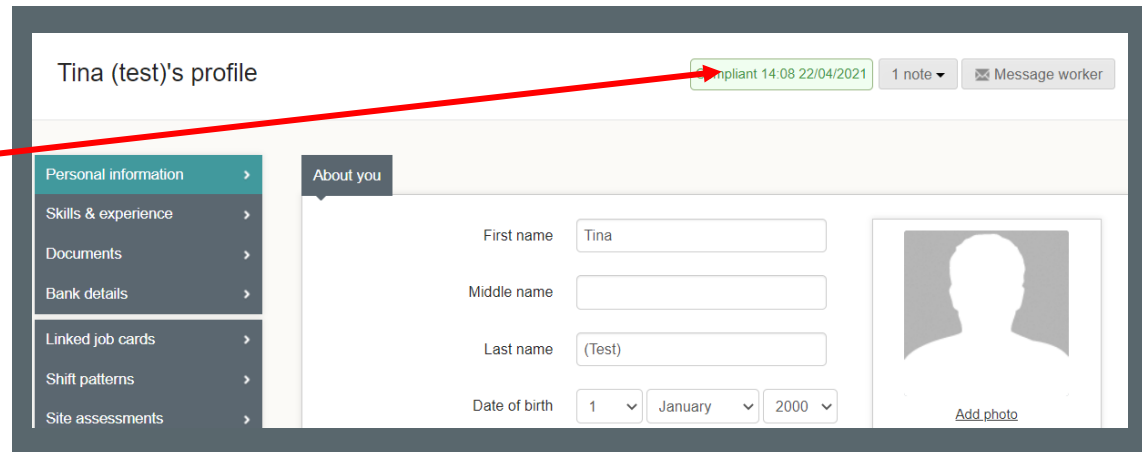


Please confirm if the right to work check outcome adheres to Company Policy

☒ Yes

☐ No

Once you have click on 'Yes' you will see at the top of the page the worker will turn compliant.



Tina (test)'s profile

Compliant 14:08 22/04/2021

1 note

Message worker

Personal information

Skills & experience

Documents

Bank details

Linked job cards

Shift patterns

Site assessments

About you

First name Tina

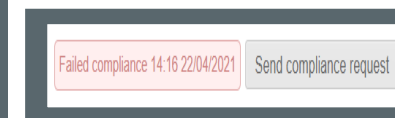
Middle name

Last name (Test)

Date of birth 1 January 2000

Add photo

If you click on 'No' you will see at the top of the page the worker will have failed compliant.



Failed compliance 14:16 22/04/2021

Send compliance request

REPORTS

COMING SOON