Manual

PersoneelsSysteem – HorecaSysteem - Shifttime

Foreword

Thank you for downloading this manual. The manual can be used for PersoneelsSysteem (www.personeelssysteem.nl) en HorecaSysteem (http://www.horecasysteem.nl).

Should you have any questions or cannot find anything in the manual? Let us know at, info@differentlab.com or contact us at +31 23 711 40 54.

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1. General

To use the software, you must first create an account with one of our

products. For example: https://www.personeelssysteem.nl/ or https://www.horecasysteem.nl/.

1.1 Active account

After registration, you will receive a confirmation email with a link to your

account and login credentials.

1.2 Login

Go to your account given in the registration email.

For example: https://www.”yourcompanynamehere”.personeelssysteem.nl/ or https://www.”yourcomanynamehere”.horecasysteem.nl/.

Enter your login credentials you received, and then click "Login".

1.3 Forgotten password

When you’ve forgotten your password, go to your account login screen.
Click on the “Forgot password” link and enter your email address.
After clicking the “Send” button, you will receive an email to reset your password.

1.4 Logout

Upon leaving the application on a public PC, we recommend logging out. This will prevent employees from gaining insight into your account or making unwanted changes.

“Log out” can be found at the top right corner.

If you have forgotten to log out and no longer on location, you can also coos to forcefully log off a user.

Forced logout
Sending new login credentials to an employee through a “Bulk action” in the “Employees” tab will force a logout on all devices.

1.5 System requirements

Our software is online and always accessible. There is a free iPhone and Android app. Here the employees can view their schedule or get updates.

Website
We recommend using the ”Google Chrome” browser. Our software gives the best user experience on a Chrome browser.

Google Chrome download link, https://www.google.com/chrome

Here is an overview of supported browsers

- Google Chrome
- Internet Explorer version 10 and higher
- Firefox
- Safari
- Opera

IPhone & Android app
There is an IPhone and Android app available in the App store and Play store.

Don't have an iPhone or Android phone, our site can be accessed through an internet browser on your phone. Navigate to your given site for a mobile version. This version can manage the most important data. This doesn't require a install of any kind.

2. Locations & departments

Within the application there is the possibility of making locations and departments. By default, the software has 1 location, containing 1 department. Inside a department teams can be created.

When a company has more than 40 employees, we recommend to use additional departments. The advantage of using additional departments is that for each a schedule and hours registration one much easier because not all employees are in a single overview displayed.

the advantages of using extra departments is that every department has its own employees and settings. This makes viewing the schedule and keeping track of timesheets a lot easier because not all employees displayed into a single overview.

Advantages lined up:

- News can be sent by department
- Scheduling can be done at department level
- Timesheet registrations by department
- Reports can be requested by location or department
- Absence is requested by department
- Employees can be exchanged between departments
- Notifications can be handled at department level
- Permissions can be set per department

Overview of departments and locations structures.

Based on these structures, the system can be configured to your wishes. Using these structures, could help you set up your business.

Below an example for a retail chain.

In this setup, two “Locations" have been created, namely “Stores” and “Office”. 3 shops have been created under the Stores. Each department has its own teams. Below the "Office" is one department “Office”, with different teams in it.

Below an example for a hotel chain.

In this example 2 locations have been created, named “Hotel Amsterdam” and “Hotel Utrecht”. Each location has 2 departments under it and multiple teams under those.

2.1 Managing locations and departments

Location or department can be found by going to “Settings” > “Departments & Locations”. Here you will find an overview of all locations and departments in the system.

2.1.1 Adding locations and departments

By clicking on the blue “+ Add location” button, a location can be added. A department is automatically created which now can be selected from the top right corner in the application. To add a department, click “Add department” under the right location.

2.1.2 Edit locations and departments

By clicking on the pencil icon behind a location or department it can be edited.

Note! Changes can only be made to an active location or department. Make sure that you first activate the department.

Note! When a department is deactivated and time tracking is done with clock in actions. Edit the contract department to the new clock department. For example, time tracking is written to the correct department.

2.1.3 Delete locations and departments

By clicking on the red cross icon behind a location or department it can be deactivated. When a location is deactivated, all underlying departments are immediately inactive.

Note! Before you deactivate a location or department, make sure the employees are at least active in one or more active departments. “Teams & permissions” update.

2.2 Switching between locations and departments

After creating a location or department, you can switch between the different departments at the top right corner.

2.3 Scheduling an employee in multiple departments

All employees can be managed through the “Teams & permissions”. This can enable functionalities and expand user permissions. User groups can be added and assigned to employees to expanded the permissions.

Employees can return in multiple departments by clicking on an employee in the "Employees" tab, clicking "Teams & permissions."

Here you will find an overview of locations and departments and which teams an employee has to return under. For which team should this user appear in the schedule can be selected here.

2.4 Permissions of employees per department

You can alter an employee's permissions by clicking on employee in the "Employees" tab, next click "Teams & permissions."

An overview of all locations and departments will be displayed. Here you can select all the permission groups needed.

For example, it can be indicated that an employee only has administrator permissions in an "Department".

3. Dashboard

From your dashboard it is possible to update your personal information under “My Account”. Here you can customize the language, upload photo and update personal data. By default, an employee can customize his / her own profile.

3.1 Edit profile picture

For changing your profile picture you go to your “Dashboard” tab and click “Change picture”. Here you can upload a photo. A photo can be uploaded in different formats “jpg” or “png”.

3.2 Edit personal information

Personal information can be edited by a user, by going to his or her “Dashboard” and clicking on “My Account”.

3.3 Edit password

An employee’s can change his or her password within the dashboard under “My Login”. Here the password can be changed after confirmation of the old one.

3.4 Edit email address

An email address can be edited in the same way by going to your “Dashboard” > “My Login” and entering your new email address and confirming this with your password.

3.5 My Schedule

Here you can view your schedule for the next 6 weeks.

3.5.1 Availability

Here you can define your preferred availability, the planner may take this into account when creating the schedule. If you want to make sure you’re not scheduled on a certain date, you should request absence.

Employees can indicate their availability in “My schedule”. Via “My schedule” you can view the schedule and availability of the coming six weeks.

Here employees can give preferred availability, so the planner can take this into consideration. If you want to make sure you’re not scheduled on a certain date, you should request absence.

3.5.2 Exchange shifts

Employees can “trade” shifts. The “exchange” of shifts is giving your own shift to a colleague in your department. To complete a exchange, the co-worker that got the exchange, must also offer his own shift in order to achieve a complete exchange of shifts.

At exchange request will generate an e-mail and push message that is sent to the selected colleagues.

A colleague can then accept this shift, first-come, first-served. When the employees have mutually agreed on an exchanged, it still needs permission to finalize the be exchange.

You will receive a notification of the mutually agreed exchange request.

Note! The exchange is only final after approval of a manager.

3.5.3 Calendar Sync

When you click the “Calendar sync” button in ”My scheduled” within the “Dashboard” tab. Or on the left of the “Schedule” tab the “Calendar sync”, a link can be found. By adding this link to your calendar, the scheduled shifts will be automatically displayed in your personal calendar.

How to add this link differs by the calendar you use. This information can be found within your calendar software.

The calendar synchronization retrieves the schedule from our system 100 days in advance and 30 days back.

3.6 My Hours

In the dashboard under “My Hours”, you can view your approved hours. You can specify which period you want to see the approved hours of.

3.7 My Absence

An absence can be registered in couple of ways. Employees can apply for it. By default, an employee can apply for a vacation, other types of absence will registered by an administrator. As an administrator, you can also add absences for your employees.

3.7.1 Request time off

In the “Schedule” tab, there’s a button on the left side: “+ Add absentee”. Employees can also request absence from the dashboard: “My absence” > “Request time off”.

3.8 My Exchanges

Here you can find an overview of all exchanged shifts sent or received. From your “Schedule” tab or “My schedule” in the dashboard you can send an exchange request. Go to the shift you want to exchange and click on, “Exchange”.

3.8.1 My pending exchanges

Here is an overview of exchange requests you have submitted. From here on out you can edit your request and follow the progress of the requests.

3.8.2 Incoming exchange request

The incoming exchange requests can be found in the mobile app under “My Exchanges”, but also in the desktop version underneath the “Dashboard” > “My requests”. Here you can accept, decline or remove the exchange requests.

3.9 My Plus Minus hours

Here is an overview of total plus minus hours.
Here are also the plus and minus overview per week.

3.10 My Files

When files are linked to your profile, they are visible underneath your “Dashboard” > “My Files”.

4. News

In the “News” tab we offer the possibility to send news item to a department or location.

4.1 Add news

To add a news item, click the “+ News item” button.

Here you can add the title and the message. Then select which department’s should receive this news item.

When adding, you can indicate whether employees should be notified by e-mail. If an employee has installed the app, the employee will receive a push message on his mobile.

4.2 Add file to news

Once a new article is placed, you’ll be taken to the page where the news is shown. On the left side you’ll find a button “+ Add file”.
Here you can choose the file you want to add to the news release, then “Submit” to add the file to the news item.

4.3 Edit news

To do this, click the “Edit” button at the bottom of the news item. Here you can change the news item, then click “Submit”.

4.4 Add comment

When you want to respond, click on the news article, here you will find the opportunity to “+ Add comment”.

5. Manage teams

Teams are an important part. Here the department can be divided into one work schedule. Teams can be managed from the left side of the schedule. When you click "Schedule" tab in the main menu, you will see all teams on the left side. From here new teams can be added, existing teams edited or be deleted.

5.1 Add team

A new team can be added by going to the “Employee” or “Schedule” tab, on the left you can add a new team by clicking “Add Team” at the bottom of the list of teams.

5.2 Edit team

A team can be edited by hovering over the team that needs to be altered. Click on the pencil icon, you will see a window where you can make adjustments.

- Here you can edit the name of the team.
- Or alter the colour of the team.

5.3 Delete team

To remove a team, click on the cross behind the team.
This cross will be visible when you hover over the team you want to delete. After clicking on the red cross, the team will be deleted after confirmation.

6. Shifts

Shifts that are used on a regular base can be added to the list. This allows you to easily add a shift with a simple click and drag motion into the schedule. In the schedule tab it is possible to manage shifts.

6.1 Add shift

A new shift can be added by clicking the "+ Add shift" button in the schedule on the left side, at the bottom of the list of shifts.

User: Here you can select one or more employees for the shift.
Team: The team in which the employee (s) works the shift.
Shift: Select the desired shift.
Start time: Start time of the shift.
End time: End time of the shift.
Break: Here you can specify how much break time employees have, thus not included in the hourly registration.
Description: A note can be posted at the shift.

6.2 Edit shift

An existing shift can be edited by hovering over a shift and by clicking on the pencil. Here you can customize and submit to save the shift.

If it is a recurring shift, you may choose to edit this one shift or edit all future shifts.

Note! Time settings in a shift are not implemented retroactively into the schedule. Only colour and name are retroactively included in the scheduled shifts.

6.3 Delete shift

A shift can be removed by clicking on the red cross behind it. After confirmation, the shift is permanently removed from the list.

7. Schedule

7.1 Add event

In the schedule there is the ability to add an agenda item. The yellow calendar bar can be found at the top of the schedule. By hovering over a day, a plus “+” can be found.

When clicked on, a pop up appears where you can select the title, date, team, and add a note if needed.

7.2 Add shift to schedule

A shift can be added by clicking behind a employees name in the schedule on the desired date. A pop-up will appear for planning of the shift with all the needed settings.

User: Here you can select one or more employees for the shift.
Team: The team in which the employee (s) runs the shift.
Shift: Select the desired shift. Start time: Shift starting time.
End time: End of shift.
Break: Here you can specify how much break time the employees have, thus not included in the hourly registration.
Description: A note can be posted at the shift.

7.3 Recurring shift

The shift can be repeated by clicking on: “Recurring”. Repeat this shift every: Here you can indicate if the shift needs to recur every other week. Next, select the days the shift should be repeated. Repeat until: Here you can indicate until which date the shift should be repeated. If left empty, the shift will be scheduled for an indefinite period.

When the shift is done, there is the possibility to inform employees by e-mail. To do this, please check: “Notify employee”.

7.4 Edit shift

If you want to edit a scheduled shift, hover above the scheduled shift you want to change. Then click on “Edit”. Here you can edit the selected shift and submit when done. If it is a recurring shift, you may choose to edit just this one shift or edit all future shifts.

7.5 Delete shift

When a shift needs to be removed, hover above the shift, click on the three dots, and click on delete. A new window will appear where the shift can be deleted. When it's a reoccurring shift, there will be two options, "Delete only this shift" or "Delete all future shifts".

7.6 Exchange shift

Employees can "trade" shifts. The "exchange" of shifts is giving your own shift to a colleague in your department. To complete a exchange, the co-worker that got the exchange, must also offer his own shift in order to achieve a complete exchange of shifts.

At exchange request will generate an e-mail and push message that is sent to the selected colleagues.

A colleague can then accept this shift, first-come, first-served. When the employees have mutually agreed on an exchanged, it still needs permission to finalize the be exchange.

You will receive a notification of the mutually agreed exchange request.

Note! The exchange is only final after approval of a manager.

7.7 Roster views

There are two types of schedules, "Employee schedule" and "Team schedule". When you move the mouse over the "Schedule" tab in the main menu you can choose between the two. The only thing that differs is the schedule view. Scheduling a shift still can be done by clicking "+ Roster shift".

7.7.1 Weekly schedule

By default, the weekly schedule is displayed. When you click on a team you will only see the team overview for that given week.

7.7.2 Daily schedule

When you click on specific day, you will see the daily schedule. There are a couple of viewing options that can be used.

7.8 View options

In the schedule there are a couple of viewing options, "Timeline", "All employees" and "Show all shifts". By checking these boxes the start and stop times of the shifts are clearly displayed. Only the scheduled employees are shown. Shifts scheduled on a different team, department or locations are taken out of the schedule.

7.8.1 All employees

On the left side of the schedule there is the option view, "All employees". When this option is checked, all employees will be shown in the schedule. When this view is turned off, only the scheduled employees will be displayed.

7.8.2 Show all shifts

On the left side of the grid there is an option "Show all shifts". When this option is checked, all shifts are displayed. Also when an employee is scheduled under another team, department or location.

7.8.3 Show wages

When "Show wages" on the left is selected, the wage costs are shown in the schedule. This option is only displayed if the logged in employee has the correct permissions to, "View salary".

7.8.4 Show hours

When "Show hours" on the left is selected, the shift hours are shown in the schedule.

7.9 Team notes

Team notes can added in the schedule. These notes can be made by clicking in the team bar on a specific day. Employees can view these notes for a given day. For example, a wedding or a concert. When you hoover over, an icon will appear. By clicking on it a note can be made or viewed.

7.10 Send schedules to employees

When a schedule is finished, it can be send by pressing the "Send schedule" button. The button is on the left side of the schedule.

Once clicked, a window appears in which you can indicate the period and employees who should receive the schedule.

By clicking on the name of a team, all employees in the relevant team are selected. All selected employees will then receive an e-mail containing their schedule for the period you have open (in the case of a weekly schedule, the schedule of the week will be send, with a day schedule, the schedule of that day will be send).

7.11 Set forecast

The expected turnover can be added by clicking the blue "Forecast" button in the "Schedule" tab. Here you can indicate the expected turnover per day.

Next, the forecast will be visible with "Show wages" in the "Schedule" tab. This includes he percentage of employee's salary relative to the expected turnover.

7.12 Set budget

The budget can be set by clicking the "Budget" button on the left side of the "Schedule" tab.

There are two types of budgets that can be set.

- Budget salary
- Budget time

Budget for salary calculates employee salary per shift on a daily, weekly or on a monthly level.

Hourly budget shows the hours worked per shift on a daily, weekly or on a monthly level.

Budget salary

Here you select "Show wages" on the left in the schedule, so you can see what a shift costs. for example, here you can view "Budget salary".

Budget time

To view the budget select "Show hours" on the left in the schedule tab. All hours will be shown and budget can be viewed in the team bar.

8. Timesheet

Timesheet registration is an important part of the system. This option can be found in the main menu under "Timesheet" tab.

8.1 register shifts

Worked hours can manually be added under the “Timesheet” tab.

By default, the scheduled shifts are copied from the schedule to the timesheet registration on a day to day base.
These settings can be found under: “Settings” > “Timesheet”.
The scheduled shifts return in to the timesheets with the status on “Pending”.

Here the hours may be adjusted to the actual worked hours.
Is there no shift in the work schedule? This can manually be added.
Hours can be added by clicking on “+ Add timesheet” behind an employee’s name.

8.1.1 Approving or declining shifts

When the hours have been entered correctly, the status of the services must be adjusted to “Approved”. By default, the status of the registered shift is set on "Pending"

Through bulk action “Set status “, you can change all timesheet statuses records at once to “Approve”, “Declined” or Pending.

Registration can be done by the supervisor or by the employees themselves, depending on how the permissions are set.

8.1.2 Add note to a shift

The system provides the opportunity to write a note with each timesheet.
To do this, click on the “Write note” icon below, this will appear in all timesheet registrations. When an employee has permission to add a timesheet the note to can be added.

8.2 Edit timesheet

To alter a timesheet, first select the correct date.
To do this, use the calendar, at the bottom left of the “Timesheet” tab.
Here you’ll find all the registered hours of the given day, from the department you’re currently in.

When the day is closed, recognizable by the green days in the calendar, you will need to open the timesheet to edit the worked hours. You do this by clicking on “Edit timesheet” at the top left corner.

The timesheet can now be modified. Once you’ve made all changes, you can click “Submit” to save any alterations.

8.3 Delete timesheet

It is not possible to remove worked shifts. However, the shift can be set to “Declined”. By rejecting the shift, the hours are not included in the employee’s salary, timesheets or payroll.

8.4 Close timesheet

Once you’re done a day can be closed off to any further mutations.
Closing a timesheets can only be done on a day to day base. The current day and all days in the past can be closed off.

Using the calendar, you can easily see which days are closed.

Note! When you close the current day, no alterations can be made. Employees who are still clocked in, can no longer clock out and get the Error notification, “You can't clock on this date because it is already closed!”.

9 Log

The log is a registration on a daily base of what has happened that day. In the log the turnover, expenses and a description can be added.

9.1 Turnover and expenses

From the log it is possible to make the revenue and expenses per day register. Based on this value, for example, the report can be viewed to the percentage of personnel costs, relative to the revenue generated.

9.2 Log

There is a possibility to keep a log each day about how the day has gone by. The log can be emailed to the manager so that they know how the day has elapsed.

When you use multiple locations, the log can be kept and viewed per location.

10 Employees

10.1 Add employee

To add a new employee, go to the “Employees” tab. Click here on the left: “+ New employee”. Here you enter the employee’s personal data.

When creating a new employee, it is required to fill in a First Name * Last Name *. If you want to give the employee access to his dashboard, do not forget to add his or her email address. Please select the contract type and fixed hours, indicate these at the days.

By default, the new employees receives an e-mail with the login credentials, the system generates a password. Once an employee is created, the employee can directly login into the account.

Note! The minimum required fields are, first and last name*

10.2 Delete employee

To remove an employee, go to the “Employees” tab. Click on the little red cross on the right side of the employee, a confirmation is needed to remove the employee.

When you confirm this request, the employee will be removed and be marked as an inactive employee. These employees can be found under “Inactive employees.”

10.3 Reactivate employee

If you want to reactivate an former employee, go to it the “Employees” tab. On the left, click on, "Inactive employees". This will give you a list of all inactive employees. When you click on the green activation icon, the user is activated once again.

10.4 Edit employee details

To edit employee information, go to the “Employee” tab. Here you can see the list of employees of the department. Click on the employee in question and on the left choose “Edit user”. When you click on the little pencil on the right side of the employee in the “Employees” tab, you can also edit the employee information.

10.5 Employee teams & permissions

The user permissions groups can be set by clicking on an employee’s name in the “Employees” tab.

Then click “Teams & permissions” on the right side.

You can also use the shortcut after the employee's name.

Standard there are for permission groups.

- Beheerder
- Bedrijfsleider
- Planner
- Medewerker

Of these groups, the "Medewerker" group has the least rights.

The rights for an employee can be set by location or department.
Read more about locations and departments in the "Managing locations" and "Managing departments" chapter.

10.6 Employee absence

Here you will find an overview of all absentees periods.

- + Add absentee

- View absence history

- View vacation corrections

You can edit the absence period by clicking on the little pencil icon on the right.

10.6.1 Add employee absentee

An absence can be registered in couple of ways. Employees can apply for it. By default, an employee can apply for a vacation, other types of absence will registered by an administrator. As an administrator, you can also add absences for your employees.

If you want employees to request different types of absentees, you can include this in the permission groups. This can be done under: "Settings" > "Permissions", here you will find the the permission that control "Availability".

An overview of all absentee types that can be registered.

- Vacation
- Sick
- Unavailable
- National day

- Special leave
- Maternity leave
- Short-term care leave
- Long-term care leave
- Parental leave
- Unpaid leave

10.7 Employee vacation hours

Employees can apply for vacation by using the app or website. Under “My absence”, employees can request absence. “Request time off”, here employees can request a vacation, in this overview they will also find an overview of their vacation hours.

10.7.1 Vacation hours starting balance

The starting balance of vacation hours can be added through a correction. “+ Add vacation correction”.

10.7.2 Add vacation correction

A correction can be made on the vacation hours. Useful for setting an initial balance. All absentees can be managed in this overview, at the bottom of the page you will find “+ Add vacation correction” button.

- Add correction
- Pay out vacation hours

Here you can specify the date on which the correction should be added. Note! This date must fall within the employee’s contract. In case of a negative correction, a “-” must be used. We recommend to add a note with every correction.

10.8 Plus minus hours

Working times may vary from time to time. For employees with a fixed contract, this means that so-called plus and min hours must be kept track of. If there are more hours worked than included in the contract, then we speak of plus hours. If less hours are worked than the contract, then we speak of minus hours. The plus and min us hours in PersoneelsSysteem / HorecaSysteem are automatically calculated and shown clearly.

The plus min hours are calculated based on the number of contract hours per day. For example, the employee has a contract of 40 hours a week and for example that there are 42 hours worked in that week. Then the employee has 2 plus hours. During the hours registration, the plus min hours are automatically updated for the employee. The plus min hours are updated weekly and can be found at the employee under “My plus minus hours” and in the “Plus min hours” reporting.

10.8.1 Plus minus hours starting balance

You can make a correction on employees plus and min hours. With a correction, a starting balance can be entered.

10.8.2 Add plus minus correction

It is possible to add plus minus correction for employee’s. In the Employee tab under “Plus Min Hours” you will find “+ Add correction”.

Correction plus min hours.
Pay out plus min hours.

Here you specify the date on which the plus or min hours should be added.

Pay attention! This date must be within the employee’s contract. In case of a negative balance, “-” minus must be placed. We recommend adding a small description to the correction.

10.9 Employee notes

There is a possibility to leave a note with the employees. Click on the name of an employee where you want to post a note, you will find “Notes” in the menu the left. Once clicked, the option will appear save notes.

When you click “+ Add note”, you will be able to add notes to an employee.

10.10 Employee files

Files can be added to an employee. For example, it is possible to store a contract, ID card, driver’s license or passport. In the dashboard you will find “My files”, here you will find an overview of all files associated with the employee.

10.10.1 Add employee file

Here you can set a “File Expiration date” and if the file should be “Visible for employee”.

Here you give the file a name and description. The expiration date is the date the document is no longer valid. Think of a driving license that is valid until a given day.

Notifications can be sent, these settings can be found under: “Settings” > “Notification”, “User file expiration” to specify which user group should receive a message.

Edit file

When you want to edit a file, click the pencil behind the file. Here you can edit the file, then click “Submit”.

Delete file

Click on the “Delete File” button to the right of the file. The file will be deleted after confirmation.

10.11 Contracts

Every employee has a contract. That contract is automatically created when creating a new employee.

To manage contracts, go to the “Employees” tab. Here you click on the name of an employee whose contracts you want to manage. Then click on “Contracts” on the left side of the submenu. Here you will find an overview of all contracts.

Note! The contracts within the application differ from the physical contracts. The contracts in the application are used as the base on which calculations are done within the system. With any salary adjustment or contract-hours update, a contract must be renewed.

10.11.1 Add contract

An contract can be added by clicking on the “= Add contract” button on the top side. A popup appears in which the contract can be added. From here on out it’s possible to set the contract type.

Note! When a contract is changed, all data in the past will be adjusted within the contract period. If you do not want this, you must end the current contract (by entering a final date) and create a new contract.

- Department, the standard department of the employee.
- Contract type, contract type that applies to the employee.
- Function, which the employee practices within your organization.
- From, the date from which the contract starts.

- To, the period when the contract expires. This field does not have to be filled when an employee has an indefinite contract.
- Hourly wage is used in the schedule and reporting filters to estimate the cost.
- Vacation calculation, the calculation that must take place to calculate the number of vacation hours.
- Wage tax, here you indicate if there is a payroll tax.
- Contract hours per day, based on contract hours, are calculated plus minus hours, vacation hours and salary.

10.12 **Bulk action**

Bulk action allows you to take action for multiple employees at once.

In the “Employees” tab you can select the employees you needed.

On the left side, select the action you want to perform under the “Bulk action” button.

You can choose from the following bulk actions

- Send message
- Change salary
- Correct plus and min hours
- Correct vacation hours
- Add absence
- Send new login credentials

Then you can perform the selected action.

10.12.1 Send message

Selecting this option a message can be send to the selected employees.

10.12.2 Change salary

Here the salary can be edited, given that it’s within the contract period of the employee.

10.12.3 Correct plus and min hours

Here a correction, pay out or a move to vacation hours can be added for the plus min hours.

10.12.4 Correct vacation hours

Here a correction, pay out or a move to vacation hours can be added for the plus min hours.

10.12.5 Add absence

By selecting this option an absence for multiple employees can be added, like for example a nation holiday.

10.12.6 Send new login credentials

Here new login credentials can be send to employees, this will force a logout of the employee on all devices. This can be used if an employee has forgotten to logout or needs new login credentials.

11 Reports

Reports will give you a clear overview of your company's time registration. The payroll report gives you a direct administration boost with powerful integrations like Nmbrs and Loket with a push of the button. For example, the reports give insight into the roster hours by comparing it against the hours worked for better planning. Absence registration is an important part of our system. Whether you want insight into the plus minus hours of your workforce or the turnover. With our powerful reports, you will immediately get a clear insight into all your planning, timesheet registrations and employees administration.

You can select reports by clicking "Reports" in the main menu.
Here you will see all available reports on the left side in the submenu.

Per report, filters can be set.
Which filters can be selected depends on the report type.

Contract hours, for all employees with fixed contract hours.
Worked hours, for all employees with zero-hour contracts.

When using a integration like Nmbrs or Loket.nl a new report is added. It is possible here to choose to send "contracts hours" and "worked hours" separately.

11.1 Available reports

Here you will find an overview of all available reports. When viewing a report, you can click on a column to determine the order. There is also a search function built-in right to further filter the results.

Period overview report will give you the worked hours, rostered shifts and turnover.

Payroll report specifies all the worked hours in the registration..

Schedule shows how many days, shifts and hours are scheduled for an employee.

Schedule detail Shows how many days, shifts and hours are scheduled for the employee’s. In addition, you will also find the shifts listed in the schedule.

Schedule vs Timesheet indicates the worked hours by department versus the scheduled hours. The smaller the difference between the schedule and hours worked indicates a tightly kept schedule.

Timesheet shows contract hours, worked hours and specified hours.

Timesheet detail shows how many days, shifts and hours are scheduled for the employee’s. In addition, you will also find shifts listed in the schedule.

Timesheets finished shows you which days are open or closed per department.

Absentee will give you all absence types of employees in a clear overview.

Log notes shown by day and department.

Turnover reporting reflects revenue indicated through the log, turnover and the expenses are shown per department per day.

(In)Active Employees report shows employees personal data.

Plus min hours allows you to see plus hours or min hours of employees and all types of leave, correction, expected contract hours and hours worked.

Availability shows availability or correct availability in the schedule with notes included.

Currently clocked in report shows the currently clocked in employees.

Nmbrs report contains all the salary information required for the salary package.

Loket report contains all the salary information required for the salary package.

11.2 Export reports

All data can be exported to Excel of CSV format. Select in the export dropdown menu, Excel or CSV to export a file.

12 Settings

In the top right corner the, “Settings” button can be found. Here all the settings can be found, with on the left side a menu to choose from.

12.1 Manage account

Here all account settings can be found like, account manager, language settings and report settings.

12.1.1 Account manager

Here you can select the account manager. The account manager always has complete access to the entire account.

12.1.2 Language settings

The system comes in three languages, Nederlands, English and Francais. Time zone and date format can be set here.

12.1.3 Roster settings

Start time / End time: Here the default roster times can be set for the schedule. Within these set times the shifts can be visualised within the scheduled. This is mainly applicable for companies that work with night shifts.

Publish all schedules: Here you can indicate whether all schedules are standardly published. If this setting is turned off, the schedules must be published manually per week, month or given date.

Show cost of company in schedule: Show salary in the schedule multiplied by cost of company. This is the percentage of personnel costs that must be added to the hourly wages. These are costs that are paid by the employer, for example taxes or insurances.

12.2 Contract types

Every contract has a contract type. These types can be set under," Settings" > "Contract types".

Within a contract type the following values can be set:

Name: A name to recognize the contract type.
Calculate plus min hours: Keep track of plus and minus hours.
Salary calculation: Contract hours or worked hours

Vacation hours build up: Here you can indicate how the holiday hours should be built up. This can be done in three ways, namely:
- Based on the contract hours
- Based on the worked hours
- No calculation

Absence calculation: Here you can indicate if the absentees should be pre-set with the scheduled hours of contract hours.
Subtract wait hours from: Select in which manner the wait hours should be deducted from salary or vacation hours
Rate card: The rate card template that applies to the contract type.
By default, it is set to, 100% standard.

Vacation hours accumulation can be added manually to an employee by means of a correction when no calculation is set.

12.3 Rate cards

Rate cards can be linked to a contract type, can be selected in the timesheet registration or can be set in a shift.
By making use of surcharge templates, the card only have to be set once. The software then automatically calculates the corresponding surcharge.

12.3.1 Edit rate card

Rate cards can be added by clicking on the blue button "+ Add rate card". The following settings will appear.

When entering, days must start at 0.00 and end at 0.00. All 24 hours must be accounted for in the given time blocks.
After the rate card has been saved, it can be selected in a contract type, can be selected in the timesheet registration or can be set in a shift.
When the rate card is set in the contract type, it automatically calculates the corresponding surcharge.

12.4 Surcharges

Surcharges can be added by clicking the blue, “+ Add surcharge”. The added surcharges can be used in the rate cards or be used in an absentee registration. These settings can be found under, “Settings” > “Surcharges”.

12.5 Holiday

By indicating the holidays, a surcharge can be automatically calculated on the given holidays. Holidays can be added under, “Settings” > “Holidays”.

12.5.1 Add holiday

“+ Add holiday “ for adding holidays manually.

12.5.2 Import holidays

Click on, “Import holidays” for adding standard holidays for each country.

Note! These dates are imported from Google calendar and can deviate from the statutory vacation days.

12.6 Notification settings

With the notifications settings you can indicate to which permission group the notifications are sent. These settings can be applied on department level.

12.6.1 Contract expiration reminder

A contract reminder can be given in number of days before a contract expires. There are two fields for setting a reminder.

12.7 Permissions

The permissions are an important part within the application. For each functionality you can indicate whether employees can or can’t use.

Permissions can be found by clicking on, “Settings” > “Permissions”.

12.7.1 Add permissions

By default, four permission groups are available. Permission groups can be altered or added. This can be done in the rightmost column by clicking on "Add".

12.7.2 Edit permission group name

The names of the permission profiles can be adjusted. This can be done by clicking on the group name.

12.7.3 Edit permissions

Changing the permissions is very simple. This can easily be done by checking / uncheck the different permissions. Once you're done simply click the, "Submit" button at the bottom of the page.

12.7.4 Default permission group

A default user group can be selected. If a new employee is created, it will automatically be given this standard permission group.

12.8 API settings

It is possible to edit and add data by means of an open API. How this works is described at: http://docs.differentlab.apiary.io/.
When setting up a integration we can offer support at all times.

12.9 Timesheet settings

Within the settings for time tracking, the settings can be managed per location or department.

12.9.1 Timesheet interval

Here you can indicate how the interval for the timesheet takes place.
By default, the worked hours can be registered per 15 minutes interval. The interval can be set in 5 minutes and be done per minute. The interval is also used in the schedule.

per 1 minute
per 5 minutes
per 15 minutes

12.9.2 Round clock in times

The clock in times can be rounded off at 15, 5, or per minute, depending on what is set in the **timesheet interval**. The clock times can be rounded off to "None", "Up", "Down" and "Nearest" using the given interval.

Below are the options with an example, based on a 15-minute time interval

- None: The clocking times are precisely registered.
- Nearest: An employee clocks at 8:06, a time of 8:00 will be registered. If the employee signs in at 8:09, a time of 8:15 will be registered.
- Up: An employee clocks at 8:03, a time of 8:15 will be registered. If the employee clocks in at 8:12, a time of 8:15 will be registered.
- Down: An employee clocks at 8:04, a time of 8:00 will be registered. If the employee clocks at 8:13, a time of 8:00 will still be registered.

12.9.3 Round clock out times

The clock out times can be rounded off at 15, 5, or per minute, depending on what is set in the **timesheet interval**. The clock times can be rounded off to "None", "Up", "Down" and "Nearest" using the given interval.

Clock out times can also be managed in the same way.
Below are the options with an example, based on a 15-minute time interval

- None: The clocking times are precisely registered.
- Nearest: An employee clocks at 17:06, a time of 17:00 will be registered. If the employee clocks at 17:09, a time of 17:15 will be registered.
- Up: An employee clocks at 17:04, a time of 17:15 will be registered. The employee clocks in at 17:10, even a time of 17:15 will be registered.
- Down: An employee clocks at 17:05, a time of 17:00 will be registered. If the employee clocks at 17:13, a time of 17:00 will still be registered.

12.9.4 Copy schedule to timesheets

The shifts are automatically copied from the schedule to the timesheets. This functionality is useful when the hours are manually registered. In this way you don't have to manually add every timesheet. The start, end and break time is automatically added.

These settings should turned off in the case employees "Clock in / Clock out". To prevent a double timesheet registrations.

12.9.5 Allow surcharges

Adds an option to calculate surcharges, when surcharges are allowed, it is possible to use rate cards in the timesheet registration.

12.9.6 Copy start- end time

If an employee **clocks in** before the start of his or her shift, the start time is copied from the schedule.

The copy starttime setting can be used in combination to the clock functionality. When clocked, the start time can be taken from the schedule.

These setting can be used to prevent employees from registering more time than worked.

A margin can be set that determines when the schedule time should be taken over. For example: An employee is scheduled to start at 8:00, the clock margin is set to 60 minutes. When the employee clocks at 7:42, a start time of 8:00 will be registered. If the employee clocks in late, 8:03. 8:03 will be registered as start time.

Copy endtime
If an employee **clocks out** later than scheduled, the end time is copied from the schedule.

A margin can be set that determines which time should be taken into account.

For example: An employee is scheduled till 17:00. The clocking margin is set to 30 minutes. When an employee clocks out at 17:15, 17:00 will be registered as end time. If the employee clocks out at 17:32, 17:32 will be recorded as end time.

12.9.7 Break calculation

How should the break duration be determined:

- None, breaks are set manually
- Automatic copy from schedule if shift duration matches clock times or when there are no break rules, otherwise calculate according to the break rules. If the times match the schedule, use the given shift break time.
- Copy from schedule, copy break from the shift by default, the pause is taken from the work schedule in the hours registration.
- Break rules, calculate according to the break rules. (See description below: “Break rules”)
- Clocked, when using this option, all employees should clock in/out. Each employee must clock their own breaktimes. The breaktimes are taken from the total worked hours.

12.9.8 Break rules

It is possible to automatically calculate the break times. This can be done by clicking the “Manage break rules” button.

Here a minimum and maximum worked hours can be set, with the corresponding break. These breaks are deducted from the worked hours.

For example, when the total clocked shift is between 2 and 6 hours of work, a 15-minute pause is deducted from the shift. When working between 6 and 10 hours, a 30-minute break will be deducted. If an employee works less than 2 hours, no break will be registered.

12.10 Billing information

The billing information can be found under: “Settings” > “Billing information”.

Here you can set your payment details and where the invoices must be sent to.

In addition, under the invoice settings, all sent invoices and payment statuses can be found.

12.11 Locations & departments

For the explanation, see the chapter "Locations and departments".

12.12 Cancel account

If the system does not match your needs. An account can be cancelled. Your account will be cancelled immediately and you will no longer be able to access your account account.

Note! It is always possible to cancel your account. This will delete all information from the database. Cancellations cannot be undone.