webroster.net
TRANSFORMING WORKFORCE MANAGEMENT

Alert Manager Upgrade: Managing calls, your way

We are excited to announce that in response to your feedback we are releasing an update to Webroster.net (version 4.5.0) and Bee (version 3.7.0). The update will include a range of fixes and improvements.

Webroster.net 4.5.0 and Bee 3.7.0 will be released on Wednesday 20 November 2019; keep reading to find out what it will include.

Due to the scale of development of Alert Manager, we highly recommend watching the online training video and accessing the updated user manuals through our Resource Centre.

In summary, the new release of Webroster.net will include:

- **Alert Manager**: Redesigned, streamlined and improved.
- **Timesheet Extract Update**: Additional data can be extracted, and the options page has had usability improvements.
- **Two-Factor Authentication**: Two-factor authentication is available for logging into the system using Google Authenticator app.
- **Time Critical Visits:** Requirements can be flagged as time critical, allowing for at a glance identification on the rosters and Bee.
- **Bee Improvements:** The schedule will update automatically when changes are made to bookings, and additional check in/out restrictions can be set.

This latest Webroster.net release also includes general updates, fixes and improvements to:

- Mapping
- Staff Portal
- Travel
- The general Webroster.net system

<u>Alert Manager</u>

Managing alerts and verifying staff time and attendance is a key part of business and needs to be easy, speedy, and clear. With input from a range of our customers we have redeveloped Alert Manager. Below is a summary of the changes, however, please refer to the updated documentation in the Resource Centre for full details.

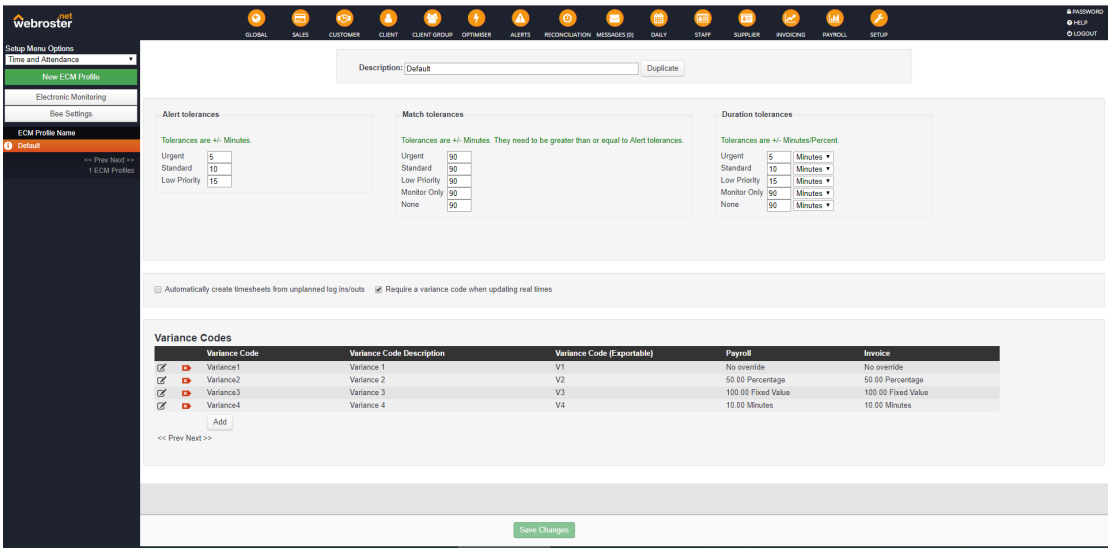
Setup:

Huge changes have been made to Setup and settings functions. We have made changes to group permissions, existing settings to improve usability and understandability, plus added some new options including:

- “External Links” has been renamed to “Time and Attendance” in the setup menu for clarity.
- Electronic Monitoring settings have been rearranged with alerting options condensed into a single place, and VOIPTrac specific options have been made more obvious.

- You can now create ECM Profiles. These control alert, matching and duration tolerances, as well as allowing you to edit variance codes for when real times need inputting or updating.

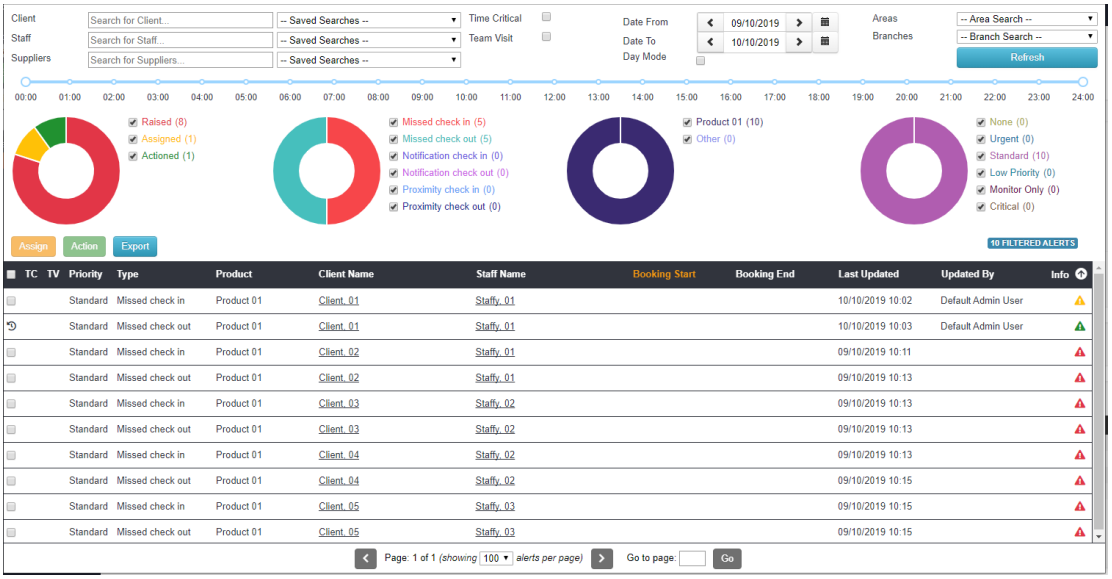
System default will be automatically created during the upgrade containing your current settings, and more can be created and assigned later. They can be assigned on a “Customer” or “Branch” level for more granular control.



Group permissions have been changed to support the new structure. On upgrade users will retain the ability to handle alerts, however we recommend these are reviewed to ensure it is still suitable.

Alerts:

Alert Manager has been redesigned; however, it has kept much of its original style so should feel familiar to users.



Managing alerts has been streamlined into a much simpler process:

- When an alert is generated it will be in a red “Raised” state in Alerts.
- You can then assign an alert to indicate it is being worked on or investigated and it will show in an orange “Assigned” state with the users’ name.
- Finally, you can action the alert it has been dealt with, add in reasons and notes and it will show in a green “Actioned” state.

There are three types of alerts shown;

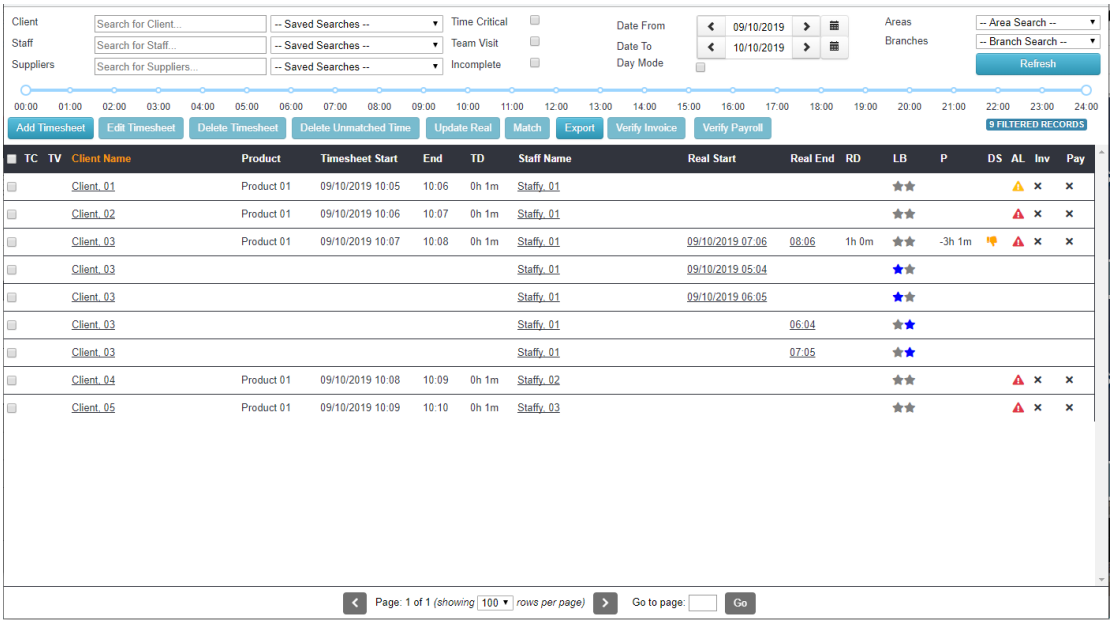
- Missed In/Out – where a check in or out has not been received
- Notification In/Out – where a check in or out has been received outside of the alert tolerances
- Proximity In/Out – where a check in or out has been received at a location outside of GPS tolerance.

While actioning a Missed In/Out alert, if a user has the right permission levels, they can also input a real-time to update the timesheet. Also, while actioning a Proximity alert the user can see on a map where the staff GPS was, compared to the expected location.

‘Historic Alert Reasons’ in ‘Global’ has been removed as all alerts are now maintained in the Alert Manager screen. Historic actioned alerts will not be shown by default, but they can be seen and searched using filter options.

Reconciliation:

Reconciliation is a new page accessed from the top navigation icons which works in conjunction with Alert Manager. It displays all timesheets in one place along with relevant at a glance data, such as if timesheets have unactioned alerts, are missing real times, or are not verified. It also shows any unmatched times which have come in via ECM applications and haven’t found their associated booking/timesheet.



By default, Reconciliation will show 'incomplete' items which need to be reviewed and addressed, such as timesheets missing real times or unmatched incoming times.

A user can match times into a timesheet, or manually input or update times, as well as verify timesheets. Any unhandled alerts against a timesheet can be actioned and cleared from this screen.

Backend Processing:

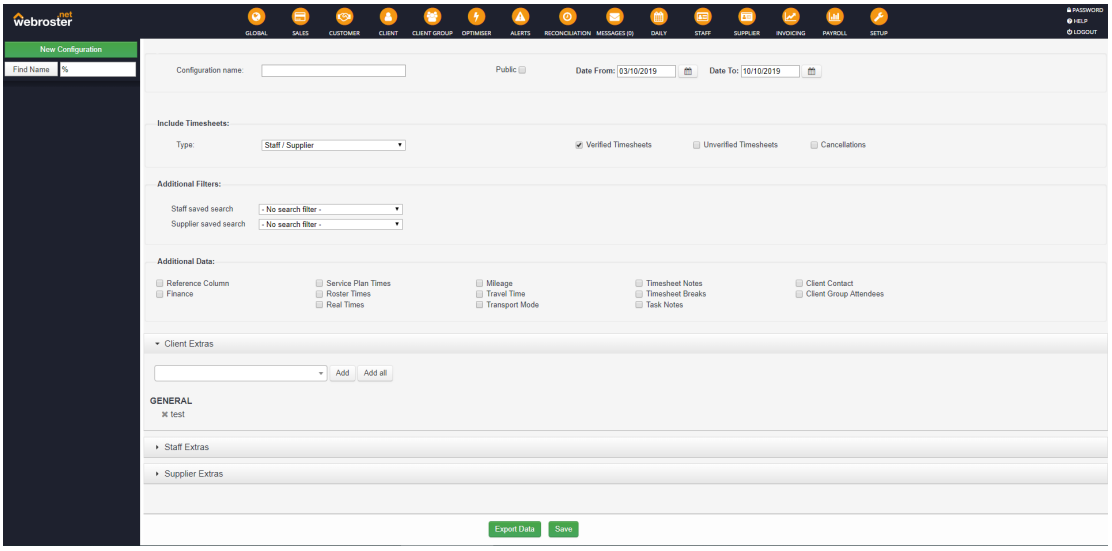
The processing of incoming times from Bee and other ECM sources has been improved to reduce the manual matching up of data.

Any check-in or check-out times received from Bee will always be inserted to their correct timesheets regardless of the time they were received, provided the booking has not been deleted in the meantime. Missed and Notification Alerts will inform you of any delays. You will no longer have to manually match up late times to bookings for Bee.

Older ECM software such as PhotoTrac and VOIPTrac will continue to use Match Tolerance to find their associated bookings.

<u>Timesheet Extract Update</u>

Timesheet extract has had a lot of new options added and we have made the user interface more user friendly. It can now extract additional data such as task notes, client contact, and timesheet notes. We recommend you have a look.

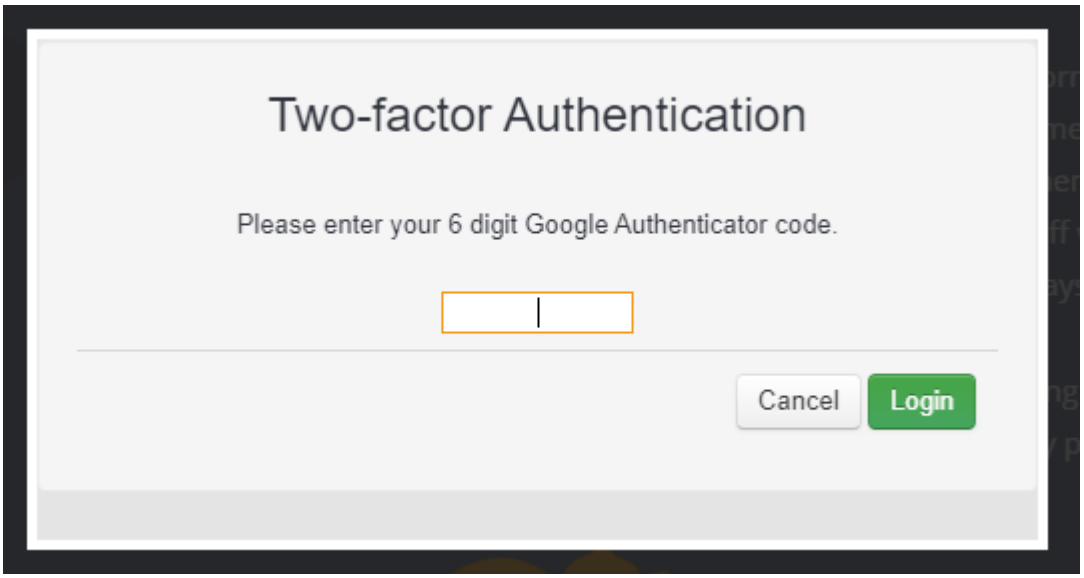


Two-Factor Authentication

Two-Factor Authentication (2FA) is an important security feature being added to many different programs worldwide and being required to meet security guidelines.

To setup 2FA, simply tick “Require Two Factor Authentication” to enable it against your existing users (Setup → Users → User Options). On the user’s next login they will receive instructions on how to install Google Authenticator and set up 2FA.

To set up 2FA as default on creation of new users, the setting can be found in Setup → Policy.



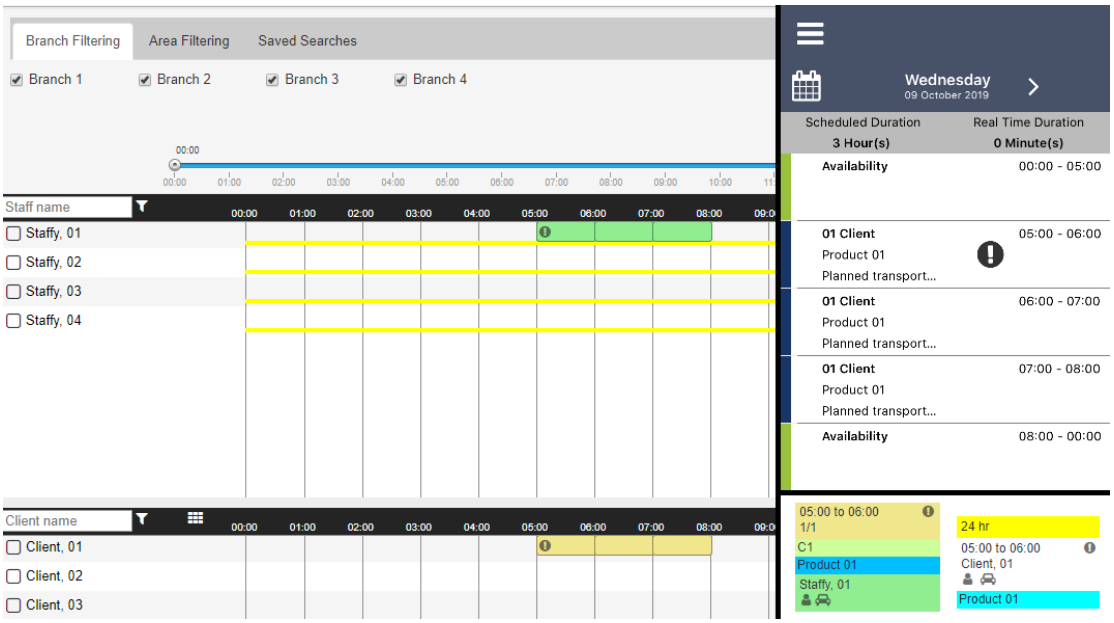
Time Critical Visits

A new setting has been added so that requirements can be flagged as time critical. The setting is on the ‘Details’ tab when creating or editing requirements and when ticked will

cause an exclamation mark icon (!) to be shown on the rosters, Daily, and Bee schedules. This will allow for at a glance identification of critical visits.

Time Critical status can also be used as a filter option on the new Alerts and Reconciliation pages.

Time Critical status is purely a visibility flag and is not currently linked to other functionality such as alert priority.



<u>Bee Improvements</u>

Change Detection:

Previously if your roster changed then the staff in the field may have to wait half an hour for that change to come through to them, or they had to manually refresh their app. Change Detection means that any changes to the roster in Webroster.net will notify Bee that it needs to resynchronise, ensuring important changes get to the staff faster than ever.

Previous Timesheet and Task Notes:

If you enable settings (Setup → Time and Attendance → Bee Settings) you can see on a visit the timesheet notes or task notes left on previous visits within the same series, for example a recurring Tuesday appointment. This will allow important information to be seen on future visits.

This is the first iteration of this feature and future work should allow this to be expanded into previous timesheets by date; for example, Tuesday could see Monday's notes, or the Dinner call could see the notes left from Breakfast. Watch this space!

GPS on Check In/Out:

To support proximity alerts, Bee takes a snapshot of the GPS location when staff check in or out of a visit and sends it back to Webroster.net.

Check In/Out Restrictions:

New settings have been added (Setup → Time and Attendance → Bee Settings) to control Bee's ability to check in and out of calls. We've added the ability to restrict the time before checking out is possible, which will stop accidental zero-minute visits, and how far in advance you can check in, which will stop accidentally checking into tomorrow's visit.

General Fixes:

- Locating Bee settings in Webroster.net has been made easier for users.
- Bee 'Task Reasons' (when a task is not completed) have been split out from 'Alert Reasons' and can now be controlled separately.
- See the date and time when Bee users last logged in and last synchronised on the Bee Dashboard.
- When Bee detects the user is not connected to a network, it will give an error message if they attempt to connect to PASS.
- After three failed login attempts using full login details, a message will display to prompt the user to contact their administrator for assistance.
- We have fixed a scenario where a remote wipe wouldn't be processed if it was issued twice in quick succession.
- Messages can once again be 'starred' or 'de-starred' as favourites.
- When creating an unplanned visit, Webroster.net will check it is always assigning an active order to the visit.

Bee 3.7.0 is only compatible with Webroster.net 4.5.0 and above. Previous versions of Bee are still compatible with Webroster.net 4.5.0 but will not have the additional functionality.

<u>Audit/History</u>

- Where a booking has been created by Optimiser it is now logged in Audit/History.

<u>Mapping</u>

- User access to BackTrac, Real Time Mapping, and Map Places can now be controlled using permission groups (Setup → Groups)

<u>Staff Portal</u>

- We have restricted user access so staff cannot change their branch.

<u>Travel</u>

- We have added a new page to allow the testing of travel modes (Setup → System → Travel Time/Expenses). It will allow you to input addresses for a route you know, then compare travel time for different travel modes and speed adjustments.
- We have also added the ability to customise the percentage increments for speed adjustments.

General Webroster.net

- The calendar date select window will display the calendar in a format matching your rostering start day, for example Mon-Sun rostering will have Monday as the first column.
- When selecting a payee for orders, the Contact/Dept field will also be shown to allow easier identification of customers.
- License Management (Setup → Users) has been made clearer and shows the correct count of disabled users. We've also added a prompt which details how to order more licenses.
- We have added a list of Webroster.net modules (Setup) to show which ones are enabled on your system and contact information should you wish to order more.
- Anonymisation functionality has been extended to Customers.
- Where there were two buttons called delete on Daily (one for the requirement, one for the booking), the "Delete" against staff bookings has been renamed to "Unallocated" to avoid confusion.
- Inactive contracts will no longer be considered when we check staff Working Areas against their Rate Sheet Areas.
- When changing a rate sheet which is in use on a staff member no longer with the correct working areas the error message has been changed to be advisory only – the rate sheet is no longer locked from being edited.
- When quick or advanced searching on Customers, user area access restrictions will now be correctly considered when displaying the results.
- When viewing or editing Account Payee on an order, it will no longer error if one of the listed customers is outside of the user area access restrictions.
- Expenses 'Default Qty' now applies as a default when adding expenses.
- The Account Payee selection now works on Edge.
- Service plan will no longer allow the input of "Every 0 Weeks" when creating a new requirement.
- When duplicating rate sheets, the correct number of characters for the name are allowed.
- We have tidied up input validation on the finance tabs of Orders and Contracts.
- We have fixed a few areas where Read Only Licensing wasn't taking effect properly.
- It is now possible to update formula type Extras such as "Add Days to Date".
- Default Roster Type will now be selected when adding requirements to a service plan, and the colour system will also apply.
- Clicking save too many times when cancelling a visit will no longer generate multiple copies of the cancellation.
- The print dialog window will now automatically close after printing.
- We have removed a few unused legacy settings and buttons.

Support

If you experience any issues following the release of Webroster.net 4.5.0 and Bee 3.7.0, please do not hesitate to contact the Webroster Customer Support Team. We are available from 8am – 6pm Monday to Friday.

Phone: 01733 516 030

Email: support@webroster.com