



Client Contact User Guide

Creating and Managing Staff Orders

1. Creating a Staff Order

After you have successfully logged in you will be on the **Contact Menu**.

Click this link to create a new Staff Order. The Order Completion screen will now load.

If you have created an order, but have saved it for later completion, it will be in your **Saved Orders** list.

The screenshot shows the 'Staff Orders' interface. At the top, there is a 'Staff Orders' header with a pencil icon. Below this, there are two main sections: 'New Staff Order' and 'Saved Orders'. The 'New Staff Order' section contains a link: 'Click here to create a New Staff Order'. The 'Saved Orders' section contains a form: 'Complete a Saved Order:' followed by a dropdown menu and a 'Go' button. Below these sections is a table titled 'Order Amendments and Extensions'.

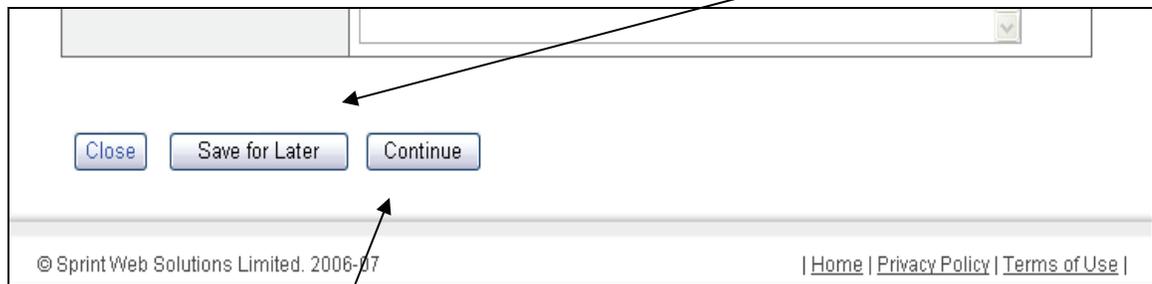
| RefNo | Agency | Start | Finish | Authorising Manager | Escalating Director | Status | |
|----------|------------------|----------|----------|---------------------|---------------------|----------|------------------------|
| CPS00004 | All Temps Agency | 15/06/07 | 31/08/07 | | | Assigned | Extend |

Complete the form as required. Fields marked with an asterisks have to be completed. If you try to move onto the next stage before you have completed all the necessary information, a warning message will be displayed.

The screenshot shows a form with several fields. A warning message box is overlaid on the form. The form fields are: 'Activities:' with the value 'Basic Word processing, batching documents'; 'First Day Details:' with a 'Contact Person' field; '* Reason for Booking:' with a dropdown menu; 'Internal Admin:' with a 'Purchase Order Number' field; and 'Other Comments/ Additional Requirements:' with radio buttons for '* CV Required?' (Yes/No) and another set of radio buttons (Yes/No). The warning message box is titled 'Microsoft Internet Explorer' and contains a yellow warning icon and the following text: '- Please enter the working period (days)', '- Please enter the working period (hours)', '- Please enter the start date', '- Please enter the finish date', '- Please enter the maximum working hours'. There is an 'OK' button at the bottom of the warning box.

Click **OK** and then complete the missing information.

If you want to save the order for completion at a later time, click the **Save for Later** button.



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If you have entered all the information and the Staff Order is ready for Authorisation, click the **Continue** button.

You will now be able to review the information you have entered.

| | | |
|---|--|--------------------------------|
| Activities: | Basic Word processing, batching documents | |
| First Day Details: | Contact Person | Start Time |
| Reason for Booking: | ongoing temp | |
| Other Comments/ Additional Requirements: | CV Required? No | Expenses Allowed? No |

[Close](#) [Go Back](#) [Submit Order](#)

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If the information is correct, click the **Submit Order** button. The order will now be sent for Authorisation.

If you need to change any of the information, click the **Go Back** button. The edit page will reload.

The **Close** button will close the Order and return you to the **Menu**. The information you have entered will **not** be saved and the order will **not** be created.

Your Staff Order is now available to view or amend from the **Order Amendments and Extensions** list.



| RefNo | Agency | Start | Finish | Authorising Manager | Escalating Director | Status | |
|----------|------------------|----------|----------|---------------------|---------------------|------------|------------------------|
| CPS00004 | All Temps Agency | 15/06/07 | 31/08/07 | | | PreApprovd | Extend |

2. Managing Orders

The options you have for managing orders depends on your user permissions.

Line Managers can only amend or extend orders.

Authorising Managers can authorise orders, as well as being able to amend or extend orders.

Escalating Managers can both authorise orders and escalate orders that are over the escalation value. Escalating Managers can also amend or extend orders.

| Order Amendments and Extensions | | | | | | | |
|---------------------------------|------------------|--------------|---------------|----------------------------|----------------------------|---------------|------------------------|
| <u>RefNo</u> | <u>Agency</u> | <u>Start</u> | <u>Finish</u> | <u>Authorising Manager</u> | <u>Escalating Director</u> | <u>Status</u> | |
| Educ00001 | All Temps Agency | 01/07/07 | 31/12/07 | H Hughes | H Hughes | Escalated | Amend |
| Educ01022 | All Temps Agency | 11/06/07 | 01/09/07 | H Hughes | H Hughes | PreApproved | Extend |
| Educ01023 | All Temps Agency | 18/06/07 | 31/12/07 | M Jones | Z Star | PreApproved | Extend |
| Educ01025 | All Temps Agency | 18/06/07 | 31/08/07 | J Sinclair | T Jones | PreApproved | Extend |

| Order Authorisation | | | | | | | |
|---------------------|------------------|--------------|---------------|---------------------|----------------------------|---------------|---------------------------|
| <u>RefNo</u> | <u>Agency</u> | <u>Start</u> | <u>Finish</u> | <u>Line Manager</u> | <u>Escalating Director</u> | <u>Status</u> | |
| Educ01022 | All Temps Agency | 11/06/07 | 01/09/07 | H Hughes | H Hughes | PreApproved | Authorise |

| Escalated Order Authorisation | | | | | | | |
|-------------------------------|------------------|--------------|---------------|---------------------|----------------------------|---------------|---------------------------|
| <u>RefNo</u> | <u>Agency</u> | <u>Start</u> | <u>Finish</u> | <u>Line Manager</u> | <u>Authorising Manager</u> | <u>Status</u> | |
| Educ00001 | All Temps Agency | 01/07/07 | 31/12/07 | H Hughes | H Hughes | Escalated | Authorise |

You will only see the lists that belong to your permission level. To view and deal with an order, click the underlined link at the end of each row.