GEMS

USER MANUAL

V4 2017

INDEX

0.0 Home Page

1. This is the first screen that will appear when you log into GEMS.

2. You can customise your Home Screen.

3. Choose your view to "Day, Timeline Week, Timeline Work Week, Timeline Month" by clicking on your preferred choice. This will then highlight in blue and your view will be updated.
   - If you chose "Timeline Month" you will see a grey bar at the bottom of the table which you can use to slide either way to view the month. On any other view, you will not see this tool.

4. By clicking on "Today" you will return to the current day's activities, you can use the arrows to the right to either "<" go back a week or ">" go forward a week.

5. Within "Selected Items" you will see "Select Dashboard Items", if you click into the field a drop-down list will appear.

6. From the drop-down list, you will have the option to "Select all" or "Deselect all". Alternatively, you can choose the items from the list that you wish to see when you log into GEMS. You can amend your list at any time by either selecting "Deselect all" or choosing the item you wish to add. You can also remove individual items from your list by clicking the white cross to the right of the item description.

1.0 CV Workflow

2. To review the status of any bookings that have been placed for you, select "CV Workflow" from the main task bar.

3. In "CV Workflow Bookings" you can search for a booking within GEMS by using the following search options below (using the drop-down options)
   o All Bookings
   o All Clients
   o All Sites
   o All Requirements
   o Candidate
   o All Status

4. Select the booking you require by clicking the radio button next to "Site", you can now review any "Allocated Candidates" and their CV's if provided and the "Rate Card Details" for this booking

5. Select "Search". To clear the search and start again please click "Clear".

2.0 Timesheets

1. To access Candidate Timesheets, select "Timesheets". Please note that if you are set to Electronic Signature ON/OFF, you will be able to view timesheets, if set to Online Timesheets ON you can also view timesheets. If set to Online Timesheets OFF then only the Candidate and Agency will be able to access timesheets.

2. Timesheets are displayed under "Awaiting Approval". The orange status circle with a white exclamation mark indicates that a timesheet is "Incomplete", a green status circle with a white tick indicates a timesheet is "Complete".

3. To search for a timesheet, select the "+" symbol next to "Search Filters", you can then search by the following
    o   Timesheet Number
    o   Timesheet Date
    o   All, Current Week, Previous Week and Other Weeks
    o   Electronic Signatures (ON or OFF)
    o   All Clients
    o   All Sites
    o   Single/Multi
    o   Timesheet Frequency
    o   Candidates

4. In "Awaiting Approval" select "Details" to view a timesheet. The timesheet will then appear detailing the timesheet number and the week commencing date.

5. In "Enter Timesheet Units", there are two headings of "Weekly" and "Daily". Depending on how the booking was raised, you can only enter hours into one option.

6. To enter hours into the timesheet, ensure that "Rates" is selected. In "Enter Units", enter the required number of units for each "Rate Desc" (Rate Description).

7. If the Candidate requires expenses to be submitted select "Expenses".
    o   Please note that if you are set to Online Timesheets you will need to contact the agency to add any expenses required.
    o   If expenses are visible enter the required number of units in "Enter Units".

8. Select "Save" to save the timesheet

9. Select "Close" to close the timesheet. The timesheet status will now be shown as "Complete" - a green status circle with a white tick. The Agency will be informed by email that a timesheet has been saved for the Candidate.

3.0 Work History

1. To review any workers allocated to your Company, select "Work History". You can then review bookings and timesheets that have been created in GEMS.

2. In "Bookings" you can search for a booking within GEMS by using the following search options below
   o Client
   o Candidate's Name
   o Booking Name

3. Select Rates next to the booking to review the Charge/Unit, AWR Charge/Unit and any expenses assigned to the booking. Select "Cancel" to close

4. Select "Search". Select "Clear" to clear your search options and start again.

5. In "Timesheets" you can search for a timesheet within GEMS by using the following search options
   o Client
   o Candidate Name
   o Booking Name
   o Site Name
   o Timesheet Number
   o Submit Date
   o Invoice No

6. You can select the Save Symbol to the right of "Invoice No" to review the invoice relating to each timesheet

7. Select "Search". Select "Clear" to clear your search options and start again.

4.0 Client Debtors

1. To review invoices that relate to your Company, select "Client Debtors"

2. In "Debtors Report" you can search for a invoice within GEMS by using the following search options (using the drop-down options)
   o Client
   o All Sites
   o Status
   o Invoice Date From
   o Invoice Date to
   o Invoice Number

3. Select "Search". To clear the search and start again please click "Clear".

4. You can review the "Status" of each invoice, statuses are detailed below
   o CAOH (Court Action on Hold)
   o Court Papers Pending
   o Debt Purchase
   o EOM (End of Month)
   o Final Demand
   o Gone Legal
   o NOCA (Notice of Court Action)
   o Open
   o Overdue
   o Request Limit

5. You can also view an invoice by selecting the required invoice under "View Invoice"

6. To clear the search and start again please click "Clear".