



Vantage IVR | User Manual
Version 1.2

List of Revisions

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1. Vantage Overview

The Vantage™ Telephone Check-In System is a Computer Telephony (CT) Interactive Voice Response (IVR) application designed to manage field staff from a Communication Operations Center. Vantage has three main functions:

1. Confirm employees' Time and Attendance
2. Notify supervisors if employees are not at the job site
3. Send messages to one or all employees.

This comprehensive system provides total management of communications, employee call-ins/call-outs and messaging. Vantage™ updates the Vision™ Labor Management System on a real-time basis with color-coded scheduling and online notification providing ease of use for Dispatch. Features include:

- Tight integration with Vision™ Labor Management System
- Real-Time Interactive Confirmation
- Easy to use (minimal training necessary)
- Can be used anywhere there is a touch-tone telephone
- System pages (or e-mails) supervisors when an employee does not sign-in to work
- Fully featured messaging application (Broadcast and Employee messages)

Vantage™ is configured in one of 2 ways:

1. For Customers using Valiant's Application Service Provider (ASP) online, customers are assigned a Toll-Free ("800") Phone Number. Using Dialed Number Identification Service (DNIS), we identify which Customer Database to interface. We use high-capacity T1 Digital Phone lines to handle many simultaneous calls.
2. For Customers with their own installation of Vision™, they are set up with their own Vantage™ Server using Analog/POTS (Plain Old Telephone Service) Lines. All calls are automatically routed to the Customer's Database. In addition, Customers can monitor Call-Traffic and Call History.

System configuration and maintenance is performed by Valiant's implementation team based on the customer's requirements specified in the Vantage Setup Form at the end of this document. Customers can change some Vantage™ settings using Vision™, described in this document, including:

- Vantage Time Zones
- Pre-Tour Sign-In Requirements
- Paging/E-mail Options for Unconfirmed Posts
- Supervisor Phone Numbers for Paging
- Phone Line Restrictions for Employee Check-In/Out
- Meal Time Tracking Function
- Mileage Expense Tracking and Reimbursement

If Vantage and Vision are implemented at the same time: These settings should be done prior to any schedule setup. The Vantage Division Settings set the default values that will be carried to the Tour level.

If Vantage is implemented after Vision: If all schedules have already been created, each Tour must be manually updated with the appropriate settings.

2. Employee Operation Overview

1. Employee dials Vantage™ Toll-Free Number.
2. The Vantage system determines from the incoming call the Dialed Number Identification Service (DNIS), which corresponds to the phone number that the employee called.
3. From the DNIS, access to the appropriate Vision™ Database is established.
4. If enabled, Employee has the option to hear the prompts in English or Spanish



5. Employee then is prompted to enter their Employee ID #. Once entered and confirmed, some or all of these options are available:

* These prompts are enabled only when the related flags/settings have been set in the Vantage tab of the Division Settings.

| | Action Key | Purpose |
|-------|------------|---------------------|
| Press | 1 | Pre-tour check-in* |
| Press | 2 | Clock in |
| Press | 3 | Tour check-in* |
| Press | 4 | Clock Out from tour |
| Press | 5 | Create Shift |
| Press | 6 | Start Meal Break |
| Press | 7 | End Meal Break |
| Press | 0 | End Call |

Smart Prompting

To avoid confusion, and to reduce call-time, once an employee clocks in for a tour, Vantage keeps track of what actions were already taken (such as Clock In) and plays only the appropriate prompts, as illustrated below:

| Employee calls to start meal break | | |
|------------------------------------|----------|---------------------|
| Press | 3 | Tour check-in* |
| Press | 4 | Clock Out from tour |
| Press | 6 | Start Meal Break |
| Press | 0 | End Call |

| Employee calls to clock out | | |
|-----------------------------|----------|---------------------|
| | | |
| Press | 4 | Clock Out from tour |
| | | |
| Press | 0 | End Call |

Exceptions:

- If the employee does not terminate the meal break and clocks out for the day, the system includes this employee in the Daily transaction log with a new action indicating meal break not terminated and notifies the employee via a voice-activated prompt at clock out time to “Contact their supervisor”.
- If the employee does not take an expected meal break, the system includes this employee in the Daily Transaction log with a new action indicating No Meal Break Taken and notifies the employee via a voice-activated prompt at clock out time to “Contact their supervisor”.

Note

Only 1 meal break is allowed per tour (shift).

3. Vision/Vantage Setup


The main function of Vantage™ is to confirm employees' Time and Attendance. Using the **Vantage** tab in Vision's Division Settings, users can set the option to have the system automatically place a call to the location supervisor for any post where an employee has not checked in after a certain amount of time has passed since their shift was scheduled to begin. Additional options such as requiring a pre-tour check-in and establishing the Vantage Time Zone are also set at this level.

Note

If Vantage and Vision are being implemented at the same time, these settings should be done prior to any schedule setup. The Vision Division Settings set the default values carried to the Tour level and only apply to new Tours/Shifts. If Vantage is implemented after Vision has been implemented and all schedules have already been created, each Tour must be manually updated with the appropriate settings.

3.1 Vision Schedule

Vision schedule functionality is maintained with the Vantage system. Someone monitoring the Vision™ Schedule Screen will see the employee change color depending on their action.

If an employee presses  (Create Shift) upon calling in, Vantage will prompt for a JobID (A unique Post ID for ALL Divisions) and if valid, will create a temporary schedule and assign the employee to that schedule.

3.1.1 Unconfirmed Tab

Vantage users have an **Unconfirmed** tab located in the bottom of the main schedule screen. This tab displays all scheduled employees who have not yet called in for their shifts.

3.1.2 Confirmed Tab

Vantage users also have a **Confirmed** tab located in the bottom of the main schedule screen. This tab displays all scheduled employees who have called in for their shifts.

3.2 Post Master (Vantage Tab)

Vantage uses Dialed Number Identification Service (DNIS) to identify which Customer Database to interface with when a call is received.

Enter one or more phone numbers that identify the Post.

The Phone Number can be a complete phone number, e.g., (516) 555-5678 or part of a Trunk Group, e.g., (516) 555-11 which is valid for (516) 555-1100 to (516) 555-1199.



Click  to add a number to the list. Click  to remove a number from the list.

4. Page Supervisor For Unconfirmed Posts

This option causes the employee’s supervisor to be paged whenever an employee’s clock-in does not occur within a specified range of minutes after the tour’s scheduled start time. When enabled, the system constantly scans the Vision™ schedule looking for posts where an employee has not “confirmed in” beyond a pre-determined time after the scheduled Job/Tour/Shift start time. If this happens, the system will send either a numeric page or play, on a telephone, a phone number corresponding to the Post phone number.

4.1 Enable Paging

In the Vantage tab of the Division Settings, select Page Supervisor For Unconfirmed Posts. Enter the number of minutes after tour begins in the Page field. These entries set the default values carried to the Tour level and only apply to new Tours/Shifts.

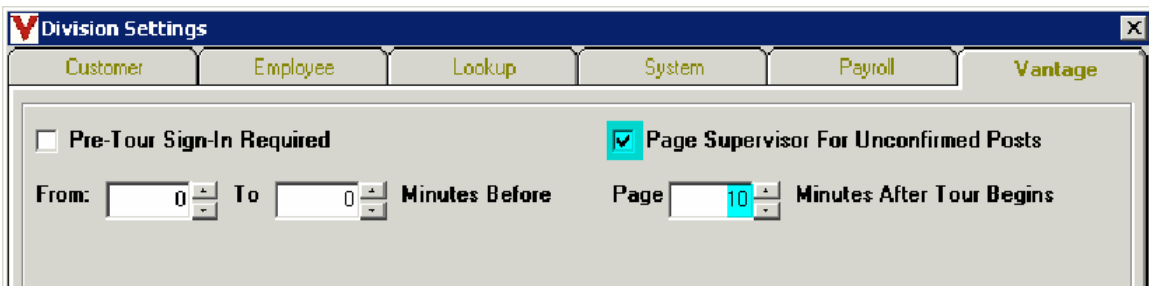


Figure 4-1. Division Settings – Vantage Tab

4.2 Change Default Paging For A Specific Tour

If the settings for a particular Tour differ from the Division Settings, or if the Tour was created prior to the setup of the Division Settings, then the values in the Vantage tab of the Tour Master can be edited.

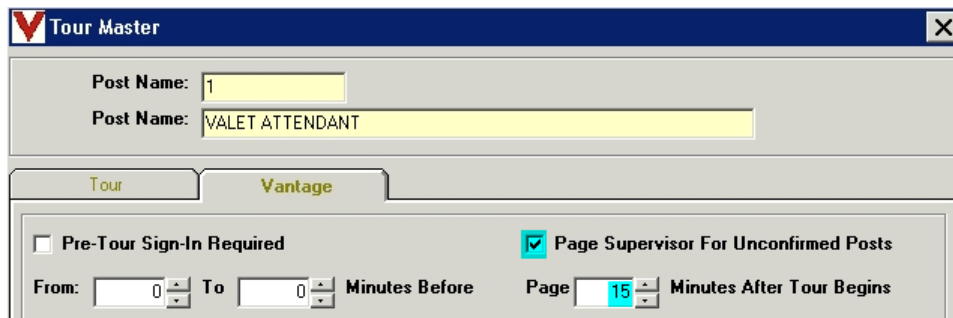


Figure 4-2. Tour Master – Vantage Tab

4.3 Supervisor Phone Number

The phone number to use when contacting a supervisor to indicate that there are unconfirmed posts is set at the Location level. The supervisor will be notified of any unconfirmed posts that are associated with their location. There are no restrictions on the type of number entered. It can be a beeper number, cell number or land line phone number.

Figure 4-3. Location Master – Location Tab

Select the Supervisor who will receive the page from the Supervisor drop-down box in the Location Master.

Note
This field cannot be left blank.

Figure 4-4. Supervisor Master

Ensure that the Supervisor is associated with a phone number in the Beeper field of the Supervisor Master.

4.4 Associate A Phone Number With A Post

A specific phone number is used to identify the post when the supervisor is notified of any unconfirmed posts that are associated with their location.

Enter a phone number in the Phone field of the Post Master.

There are no restrictions on the type of number entered. It can be the phone number at that post or a unit number that identifies that post. This is the callback number that is sent to the pager. It cannot be blank.

The screenshot shows the 'Post Master' application window. The form contains the following fields and values:

- Location:** 1, MAIN OFFICE
- Post:** 1, **Job ID:** 200001
- Name:** FIRST FLOOR
- Address:** (empty)
- City:** (empty), **State:** NY
- Zip:** (empty), **Phone:** (516) 555-1234 (highlighted with a red circle)
- Job Status:** PERMANENT (dropdown), ACTIVE (dropdown)
- Job Type:** TOUR (dropdown)

At the bottom of the window, there are tabs for 'Notes', 'Post', 'Rate', 'Billing Option', 'Orders', 'Vantage', and 'Mileage'. The 'Post' tab is currently selected. The status bar at the bottom shows 'R: 1' and 'Post'.

Figure 4-5. Post Master

5. E-mail Supervisor For Unconfirmed Posts

This option allows the work location's supervisor to be e-mailed whenever an employee's clock-in does not occur within a specified range of minutes after the tour's scheduled start time. When enabled, the system constantly scans the Vision™ schedule looking for posts where an employee has not "confirmed in" beyond a pre-determined time after the scheduled Job/Tour/Shift start time. If this happens, the system will send an e-mail notification (see sample message below) to the e-mail address(es) specified on the Supervisor Master for the specified Location.

-----Original Message-----

From: VANTAGE@valiant.com [<mailto:VANTAGE@valiant.com>]

Sent: Thursday, April 10, 2008 2:35 PM

To: Rani Zee

Cc: Dave Kave

Subject: In-Tour Checkins

The following Tour has not been confirmed-in:

Weekending: 04/13/2008

Customer: 070060 – My Favorite Customer

Location: 1 - My Favorite Building

Post: 3 - Vestibule

Date: 04/10/2008

Time: 14:00 - 16:00

Employee: TEST1000005972, TEST

The information contained in this e-mail message, and any attachment thereto, is the property of Valiant and is confidential and may not be disclosed without our express permission. If you are not the intended recipient or an employee or agent responsible for delivering this message to the intended recipient, you are hereby notified that you have received this message in error and that any review, dissemination, distribution or copying of this message, or any attachment thereto, in whole or in part, is strictly prohibited. If you have received this message in error, please immediately notify us by telephone, fax or e-mail and delete the message and all of its attachments.

Thank you.

Every effort is made to keep our network free from viruses. You should, however, review this e-mail message, as well as any attachment thereto, for viruses. We take no responsibility and have no liability for any computer virus which may be transferred via this e-mail message.

Figure 5-1. E-Mail Notification

5.1 Supervisor E-mail Address(es)

The e-mail address(es) used to notify a supervisor that there are unconfirmed posts is set at the Location level. The Location supervisor (not necessarily the Employee's supervisor) will be notified of any unconfirmed posts that are associated with their location.

1. Select the Supervisor who will receive the e-mail from the Supervisor drop-down box in the Location Master.

Note

This field cannot be left blank.

Figure 5-2. Location Master – Location Tab

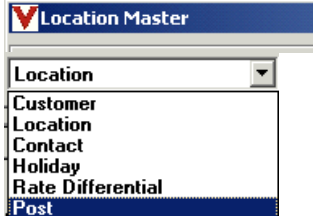
2. Enter the Supervisor's e-mail address in E-Mail 1.

If you enter an address in E-Mail 2, an e-mail is sent (cc:) to that address also.

Figure 5-3. Supervisor Master

5.2 Tour Master Settings

3. Select **Post** from the Location Master drop-down to display the Post Master.



4. Select **Tour** from the Post Master drop-down to display the Tour Master.

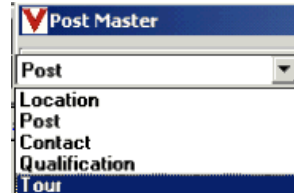


Figure 5-4. Tour Master

Note

E-mail notification capability is an interim solution utilizing the existing user interface. Field names on the Vantage tab of the Tour Master are scheduled for updating in the near future.

5. Select Page Supervisor for Unconfirmed Posts.
6. Enter the number of Minutes After Tour Begins (must be greater than zero).
7. Select "Send Mail" from the Notification drop-down.

6. Messaging

Vantage™ gives Managers, Supervisors and Dispatchers the ability to leave introductory and broadcast messages for the company or individual employees. For Hosted Vantage™ installations, a Supervisory ID Number and Password are assigned from the Setup form when Vantage™ is installed.

Figure 6-1. Messaging – Setup Form

To use Vantage™ Messaging:

1. Dial the Vantage™ “800” number
2. When prompted for Employee (or Social Security No.), enter the Supervisor User No
3. When prompted, enter your Password
4. An audio recording will list the available options. Select the desired option as follows:
 - Press **1** for Record New Introductory Message
 - Press **2** for Delete Current Introductory Message
 - Press **3** for Record New Broadcast Message
 - Press **4** for Delete Current Broadcast Message
 - Press **5** for Record Message To Employee
 - Press **0** to End Call

6.1.1 Introductory Message

This message is played instead of the default, “Thank you for calling Vantage”. Ex. “Welcome to XXX Call-In System”.

To either record or delete an introductory message, dial into the Vantage™ Messaging System and press **1** to record a new message or press **2** to delete the current message. If you want to record a new message over the current one, you do not have to delete the current introductory message; the system will record over it.

6.1.2 Broadcast Message

This message is played to every employee once the employee call-in or call-out has been confirmed. Ex. "Please contact your manager if you are available to work on Thanksgiving Day".

To either record or delete a broadcast message, dial into the Vantage™ Messaging System and press **3** to record a new message or press **4** to delete the current broadcast message. If you want to record a new message over the current one, you do not have to delete the current broadcast message; the system will record over it.

6.1.3 Individual Messages (Message to Employee)

Once an employee dials in and the call-in or call-out is confirmed, Vantage™ will let the employee know that he or she has a message after the broadcast message is played.

The employee has the option to press **1** to listen to the message or press **2** to skip the message. Once employees listen to the message, they have the ability to save or delete the message.

To record an individual message, dial into the Vantage™ Messaging System and press **5** to record the message; the system will prompt you to enter the employee's ID #.

7. Clock Rules

Various settings in Vantage and Vision determine the methods used for tracking and rounding time.

7.1 Time Zone

Enter the hour(s) differential (from the office that is running the software and the Division location) in the Vantage Time Zone text box on the Vantage tab of the Division Settings.

For example, for a Valiant-hosted application (Eastern Time Zone), a division in California would contain a “-3” to indicate three hours back from Eastern time.

Division Settings

Customer Employee Lookup System

Pre-Tour Sign-In Required

From: 0 To: 0 Minutes Before

Vantage Time Zone: 0 Hour(s)

7.2 Schedule Range

This is the number of minutes considered acceptable to check in or out. Outside this range you will receive an early or late message. (Valiant Setup.)

7.3 Allowable Range

This is the number of minutes before or after the schedule considered acceptable to check in or out. Outside this range you will receive a “...Too Early” or “...Too Late” Message. (Valiant Setup.)

7.4 Rounding

Vantage rounds to the nearest 15 minutes by default within the acceptable ranges. (Valiant Setup.) Other rounding rules are available, as well as no rounding rules. Rounding rules are recommended to avoid payment for fractional hours.

7.5 No Sign-In Early

If set, then all times earlier than the check in are set to the scheduled “in time” automatically. (Valiant Setup.)

7.6 No Sign-Out Late

If set, then all times later than the check out are set to the scheduled “out time” automatically. (Valiant Setup.)

7.7 Pre-Tour Sign-In Required

In the Vantage tab of the Division Settings, select this option if the employee is required to check in before the tour or shift starts.

Enter the range (From and To) of Minutes Before sign-in that are required.

Division Settings

Customer Employee Lookup System

Pre-Tour Sign-In Required

From: 0 To: 0 Minutes Before

Vantage Time Zone: 0 Hour(s)

7.8 During Tour Check-in Required

In the Vantage tab of the Tour Master, select this option if the employee is required to check in during a tour.

The screenshot shows the 'Tour Master' interface with the 'Vantage' tab selected. It includes fields for 'Post Name' (with the value '2') and a 'Pre-Tour Sign-In Required' checkbox which is unchecked. The 'During Tour Check-In Required' checkbox is checked and highlighted in red. Below these options are 'From' and 'To' spinners followed by the text 'Minutes Before'.

Important Note

The Tour Check-In Range in minutes (on the Vantage tab of the Division Settings) must be greater than zero to enable the During Tour Check-In Required option.

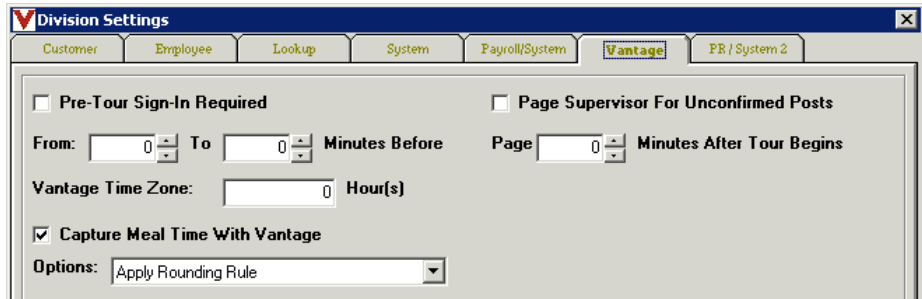
Selecting this option displays the days of the week, where the number of check-ins required for a Tour may be specified for each day of the week, starting with the first day of the tour. (In this example, the schedule starts on a Wednesday.)

This screenshot shows a detailed view of the 'During Tour Check-In Required' section. It features a table with columns for each day of the week: Wednesday, Thursday, Friday, Saturday, Sunday, Monday, and Tuesday. Each column contains a spinner control with the number '0' currently displayed, indicating the number of check-ins required for that day.

Entering a "7" on any day, for example, would require an employee to check in every hour during the tour. The employee's initial check-in (Shift Start) for a tour would not count towards this number, but a Meal break and Shift End would. Depending on the number of required check-ins and the length of the tour, Vantage calculates the actual time of day when these check-ins must occur. Vantage advises the employee of these times when the employee first calls in to start the shift. The employee must call the supervisor to check-in at the specified times, plus or minus the Tour Check-In Range (in minutes) specified in the Vantage tab of the Division Settings.

8. Meal Time Tracking

Meal Time Tracking is enabled from the Vantage tab of the Division Settings when the Capture Meal Time With Vantage option is set .



There are three options for tracking employee meal times, selected from the drop-down box:

8.1 Preserve Meal Duration

With this option, the system records the clock Start time of the meal and adds the default meal Duration to derive the End time of the meal.



The default meal time (duration) can be set at many levels, where the lowest level (shift) takes precedence:

| Level (highest to lowest) | Where set | Specific Tab |
|---------------------------|-------------------|--------------------|
| company | Customer Master | Format Tab |
| division | Division Settings | System Tab |
| location | Location Master | Billing Tab |
| post | Position Master | Billing Option Tab |
| shift | Main Window | Schedule Tab |

You may also specify the default (expected) meal time for an individual employee from the schedule:

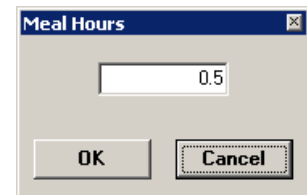
Right-click on the desired scheduled employee name at the desired day and shift to display a list of the available options.



Select **Confirm**.

Select **Meal/Stops** to display the Meal Hours window.

You may enter the meal's Total Hours for the shift even when the "Capture Meal Time Via Vantage" option is not set.



Note

When an employee starts a meal break, the default schedule color for that shift will change to orange. Once Meal End is set, the schedule returns to Confirmed-In color (light green).

8.2 Actual Vantage Clock Time is Applied

With this option, the system subtracts the clock Start time of the meal from the clock End time of the meal to derive the meal's Duration.



Capture Meal Time With Vantage

Options:

- Preserve Meal Duration
- Actual Vantage Clock Time is Applied**
- Apply Rounding Rule

8.3 Apply Rounding Rule

With this option, the system applies the specified Vantage rounding Rule to the clock Start and End times for the meal, then subtracts the rounded Start time from the rounded End time to derive the meal's Duration.



Capture Meal Time With Vantage

Options:


- Preserve Meal Duration
- Actual Vantage Clock Time is Applied
- Apply Rounding Rule**

9. Mileage Expense Tracking and Reimbursement

Vision supports mileage tracking and reimbursement from the Schedule (via the Adjustments tab of the Schedule Confirm Master as well as the Insert Payroll Adjustment function), the Payroll Adjustment function from the Masters menu, or the Others drop-down in the Employee Master and Post Master.

Vision customers using the Vantage telephone check-in system can generate these adjustments automatically. When the Vantage Mileage Expense option is enabled, you are able to record employee mileage expenses when they clock out from their tours and reimburse them through a payroll adjustment.

9.1 Enable Mileage Tracking

1. Click the edit button .
2. Set the Mileage Expense flag in the Mileage tab of the Post Master
3. Enter the company's mileage rate in the Payroll field.
Payroll:
4. Set the Tax flag if applicable.
5. Select the G/L Account from the drop-down if you are tracking this expense via a general ledger account.

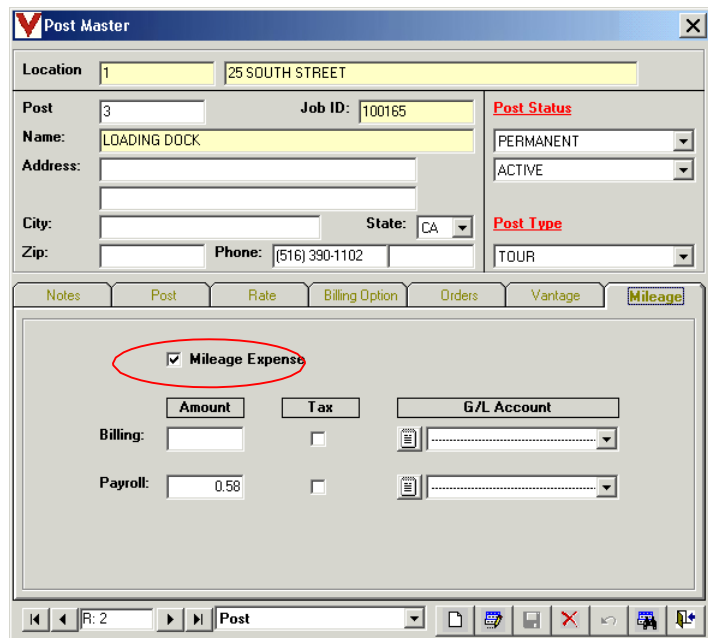


Figure 9-1. Mileage Tab

9.2 Entering Employee Mileage

1. Employee calls the 800 Vantage Line and selects the option to Clock Out by pressing 4.
2. Vantage then prompts the employee to "Enter Mileage".
3. Employee enters Mileage amounts by pressing the applicable numbers on the telephone's keypad.
4. Vantage confirms the mileage amount and then offers the option to "End Call".

| Employee calls to clock out | | |
|-----------------------------|----------|---------------------|
| Press | 4 | Clock Out from tour |
| Press | 0 | End Call |

9.3 Reimbursing Employee Mileage Expense

When the Mileage Expense option is enabled, Vision automatically generates a Payroll Adjustment. All fields are automatically populated based on the mileage entered by the employee when clocking out and your selections in the Mileage tab of the Post Master.

The miles entered by the employee appear in the Regular Hours field.

The Description field includes the word "MILEAGE" and the date/time of the entry.

The authorized user should verify all entries and may modify the fields as needed. For example, you may wish to select an Earning Type (e.g., mileage) that is set up to avoid the Federal, State and local taxes normally associated with regular hours, if applicable.

Payroll adjustments are described in Section 4 of the Vision Manual.

Note

Tracking of employee mileage expenses is enabled for Payroll adjustments only – adjustments to Billing are not currently supported through Vantage’s Mileage tab.

10. Vantage Reports



Reports specific to Vantage are located under the Vantage/Handlink category in the Vision Reports menu.

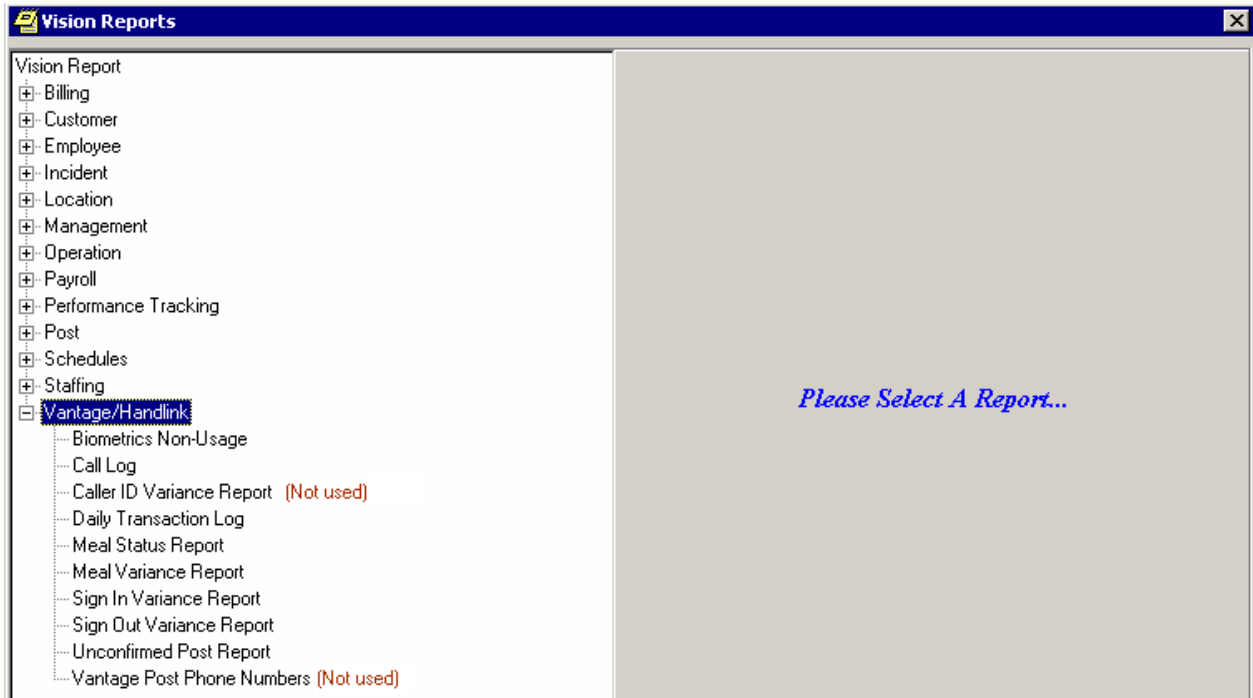
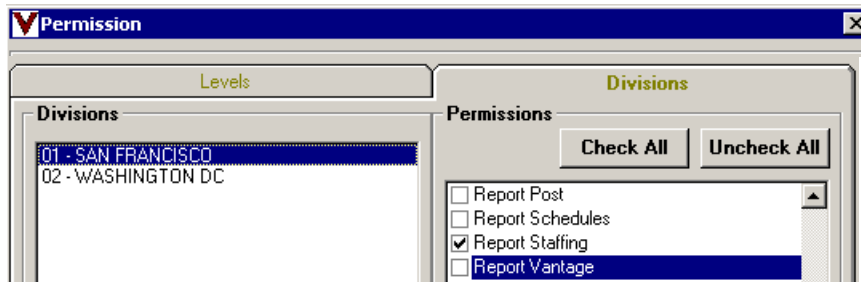


Figure 10-1. Vantage Reports

To access these reports, the “Report Vantage” permission must be assigned by the superuser.



10.1 Call Log

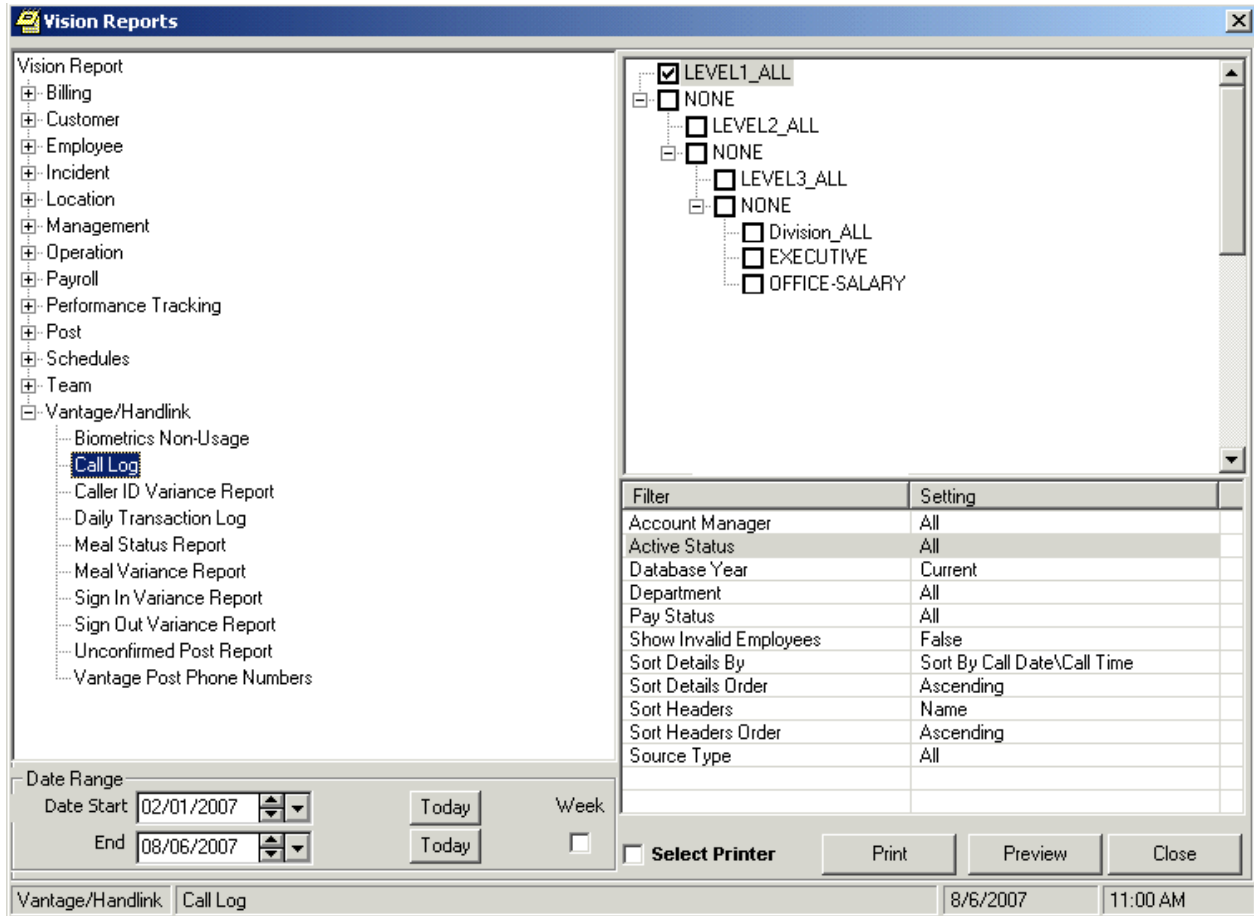
The Call Log displays a list of all Vantage transactions in date, time and User ID sequence for each Division. Users with both Vantage and Handlink can report on all transactions or, using the Source filter, select either Vantage or Handlink transactions for the desired date range.

| ATL | | | | | | | | | |
|---|----------|---------|----------|-----------|------------|-----------------|------------|---------------------------|----|
| Vantage/Handlink/Vallink Call Log | | | | | | | | | |
| Call Date From: 02/01/2010 To: 02/07/2010 | | | | | | | | | |
| CallDate | CallTime | User ID | Lastname | FirstName | SourceType | Action | Caller ID | ErrorLog | |
| 02/01/2010 | 6:02:00 | 897268 | | | VANTAGE | Sign-In | 5163901149 | EARLY CLOCK IN | |
| 02/01/2010 | 6:02:00 | 897268 | | | VANTAGE | Break-Start | 5163901149 | MEAL START | |
| 02/01/2010 | 6:35:00 | 897268 | | | VANTAGE | Break-End | 5163901149 | MEAL END | |
| 02/01/2010 | 8:08:00 | 896320 | | | VALLINK | Shift Start (0) | | OK | |
| 02/01/2010 | 11:00:00 | 897268 | | | VANTAGE | Sign-Out | 5163901149 | EARLY CLOCK OUT | |
| 02/01/2010 | 12:03:00 | 896320 | | | VALLINK | Meal Start (2) | | OK | |
| 02/01/2010 | 12:46:00 | 896320 | | | VALLINK | Meal End (3) | | OK | |
| 02/01/2010 | 13:05:00 | 896320 | | | VALLINK | Shift End (1) | | OK | |
| 02/05/2010 | 11:00:00 | 891382 | | | VALLINK | Shift Start (0) | | CLOCK IN NOT IN ALLOWED R | |
| 02/05/2010 | 11:48:00 | 891382 | | | VALLINK | Shift Start (0) | | CLOCK IN NOT IN ALLOWED R | |
| 02/05/2010 | 11:51:00 | 891382 | | | VALLINK | Shift Start (0) | | CLOCK IN NOT IN ALLOWED R | |
| 02/05/2010 | 11:54:00 | 891382 | | | VALLINK | Shift Start (0) | | CLOCK IN NOT IN ALLOWED R | |
| 02/05/2010 | 11:58:00 | 891382 | | | VALLINK | Shift Start (0) | | CLOCK IN NOT IN ALLOWED R | |
| 02/05/2010 | 12:00:00 | 891382 | | | VALLINK | Shift Start (0) | | OK | |
| 02/05/2010 | 12:13:00 | 891382 | | | VALLINK | Meal Start (2) | | OK | |
| 02/05/2010 | 12:25:00 | 891382 | | | VALLINK | Meal End (3) | | OK | |
| 02/05/2010 | 12:33:00 | 891382 | | | VALLINK | Shift End (1) | | OK | |
| Number of Punches/Calls --> | | | | | | | | | 17 |

Figure 10-2. Call Log

10.1.1 Column Descriptions

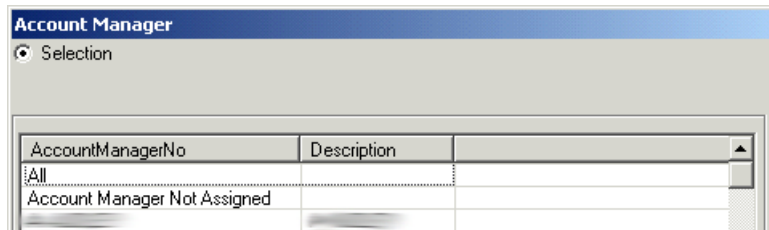
| Column | Description | Source |
|------------|---|-----------------|
| CallDate | Date call was placed | System |
| CallTime | Time call was placed (hhmmss) | System |
| User ID | The Employee's ID | Employee Master |
| Lastname | The Employee's last name | |
| FirstName | The Employee's first name | |
| SourceType | The source of the call (Vantage, Handlink or Val Link). Note that entries for Val Link include the internal device ID for identification purposes. <u>VALLINK</u> 672 | System |
| Action | The purpose of the employee's call | System |
| Caller ID | Not used | |
| ErrorLog | Action result based on clock rules | System |



10.1.2 Report Filters

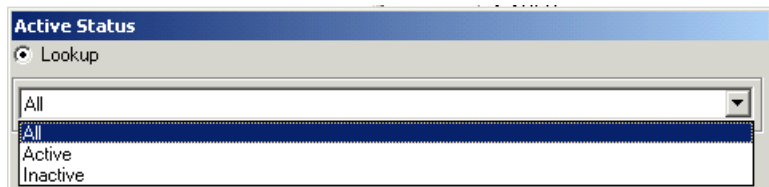
10.1.2.1 Account Manager

The sales representative assigned to the customer.



10.1.2.2 Active Status

You may select Active or Inactive employees (default=All).



10.1.2.3 Database Year

This filter reports transactions by the year in which the transactions occurred (default=Current).

To report on a different year, double-click Database Year to display the related pop-up window and select the desired year.

Database Year

Selection TranYear TranYear

| TranYear | |
|--------------|--|
| Current Year | |
| 2002 | |
| 2003 | |
| 2004 | |
| 2005 | |
| 2006 | |

To view the 2005 archived data, for example, select 2005 and enter a Date Range within the 2005 year. This will display the archived data for that year.

10.1.2.4 Department

You may select one or more departments (default=All).

Department

Selection Department Department

| Department | |
|------------|--|
| All | |
| 002100 | |
| 009-01 | |
| 010000 | |
| 010100 | |

10.1.2.5 Pay Status

You may select Hourly, Salary or All employees.

Pay Status

Selection

| PayStatus | |
|-----------|--|
| All | |
| Hourly | |
| Salary | |

10.1.2.6 Show Invalid Employees

Show Invalid Employees

True/False

True False

10.1.2.7 Sort Details By

Sort Details By

Lookup

Sort By Call Date\Call Time

Sort By UserID\Call Date\Call Time

Sort By CallerID\Call Date\Call Time

10.1.2.8 Sort Details Order

Sort Details Order
 Lookup
Ascending
Ascending
Descending

10.1.2.9 Sort Headers

Sort Headers
 Lookup
Name
Name
Number

10.1.2.10 Sort Headers Order

Sort Headers Order
 Lookup
Ascending
Ascending
Descending

10.1.2.11 Source Type Filter

This filter reports transactions by the source of the transaction (default=All).

Source Type
 Lookup
All
All
VANTAGE
HANDLINK
VALLINK

10.2 Daily Transaction Log

The Daily Transaction Log report displays a list of all completed Vantage transactions; incomplete calls (such as hangups) are not included.

| Daily Transaction Log | | | | |
|-----------------------|---------------|----------|----------|--------|
| Employee No | Employee Name | Customer | Location | Post |
| | | | | GATE 4 |

| | | From | 08/06/2006 | To | 08/06/2006 |
|------------|-------------|--------|------------|--------|------------|
| Tour | In - Out | Source | Call Time | Action | |
| 08/06/2006 | 22:00-06:00 | | 21:19 | OK | |

Figure 10-3. Daily Transaction Log

10.2.1 Column Descriptions

| Column | Description | Source |
|---------------|--|---------------------|
| Employee No | The Employee's ID | Employee Master |
| Employee Name | The Employee's last name, first name | |
| Customer | The name of the customer | Customer Master |
| Location | The customer's location | Location master |
| Post | The post at the customer's location | Post Master |
| Tour | The date of the tour (shift) | Shift (Tour) Master |
| In | The scheduled in time of the tour | Schedule |
| Out | The scheduled out time of the tour | |
| Source | The source of the call (Vantage or Handlink) | System |
| Call Time | Time call was placed (hhmm) | System |
| Action | Action result based on clock rules (OK=within clock rules) | System |

10.2.2 Report Filters

Filter

| Filter | Setting |
|--------------------|-----------|
| Account Manager | All |
| Active Status | All |
| Department | All |
| Employee Name | All |
| Pay Status | All |
| Sort Headers | Name |
| Sort Headers Order | Ascending |

Date Range
 Date Start: 02/01/2007 Today Week
 End: 08/06/2007 Today

Select Printer

Vantage/Handlink | Daily Transaction Log | 8/6/2007 | 11:59 AM

10.2.2.1 Account Manager

The sales representative assigned to the customer.

Account Manager

Selection

| AccountManagerNo | Description |
|------------------------------|-------------|
| All | |
| Account Manager Not Assigned | |

10.2.2.2 Active Status

You may select Active or Inactive employees (default=All).

Active Status

Lookup

| |
|----------|
| All |
| Active |
| Inactive |

10.2.2.3 Department

You may select one or more departments (default=All).

Department

Selection Department Department

| Department |
|------------|
| All |
| 002100 |

10.2.2.4 Employee Name

To filter report results by Employee Name (default=All), double-click Employee Name to display the related pop-up window and select one or more employees.

Employee Name

Selection EmployeeName EmployeeName

| EmployeeName | Division | EmployeePreml | SSNum | Department |
|--------------|---------------|---------------|-----------|------------|
| TEST | TEST DIVISION | 1444444444 | 444444444 | |
| CONTRA | TEST DIVISION | 1456321789 | 456321789 | 101 |

10.2.2.5 Paystatus

You may select Hourly, Salary or All employees.

Pay Status

Selection

| PayStatus |
|-----------|
| All |
| Hourly |
| Salary |

10.2.2.6 Sort Headers

Sort Headers

Lookup

| |
|--------|
| Name |
| Number |

10.2.2.7 Sort Headers Order

Sort Headers Order

Lookup

| |
|------------|
| Ascending |
| Descending |

10.3 Meal Status Report

The Meal Status report indicates whether employees are on lunch break or back to work, based on the clock in/clock out timestamp that verifies the confirmed and unconfirmed status of the employee at a designated post and shift. The report includes:

- A list of employees who clocked out for a Meal but never clocked back in after the Meal break.
- A list of employees who clocked both in/out for the Meal break.
- A list of employees who did not clock in/out for the Meal break at all.

| TEST DIVISION | | | | | | | | | |
|--------------------|-----------------|-------------------------|----------|-------|------------|-------------|-----------------|---------------|--------------------------|
| Meal Status Report | | | | | | | | | |
| | | | | | | From | 07/19/2006 | To | 07/25/2006 |
| Employee No | Employee Name | Customer | Location | Post | Tour | In - Out | Meal Start Time | Meal End Time | Status |
| 12345 | CONTRACTOR, SUB | VALIANT SOLUTIONS, INC. | WOODBURY | LOBBY | 07/19/2006 | 23:00-07:30 | 05:00 | 5:30 | Confirmed - Meal Taken |
| 12345 | CONTRACTOR, SUB | VALIANT SOLUTIONS, INC. | WOODBURY | LOBBY | 07/20/2006 | 23:00-07:30 | 03:00 | | Unconfirmed - Meal Taken |
| 12345 | CONTRACTOR, SUB | VALIANT SOLUTIONS, INC. | WOODBURY | LOBBY | 07/25/2006 | 23:00-07:30 | | | No transaction |

Figure 10-4. Meal Status Report

10.3.1 Column Descriptions

| Column | Description | Source |
|-----------------|---|---------------------|
| Employee No | The Employee's ID | Employee Master |
| Employee Name | The Employee's last name, first name | |
| Customer | The name of the customer | Customer Master |
| Location | The customer's location | Location Master |
| Post | The post at the customer's location | Post Master |
| Tour | The date of the tour (shift) | Shift (Tour) Master |
| In | The scheduled in time of the tour | Schedule |
| Out | The scheduled out time of the tour | |
| Meal Start Time | The time (hhmm) the employee's meal started (Meal In) | System |
| Meal End Time | The time (hhmm) the employee's meal ended (Meal Out) | System |
| Status | Employee's tour status based on the schedule | System |

10.3.2 Report Filters

10.3.2.1 Active Status

You may select Active or Inactive employees (default=All).

10.3.2.2 Department

You may select one or more departments (default=All).

| Department |
|------------|
| All |
| 002100 |

10.3.2.3 Employee Name

To filter report results by Employee Name (default=All), double-click Employee Name to display the related pop-up window and select one or more employees.

| EmployeeName | Division | EmployeePreml | SSNum | Department |
|--------------|---------------|---------------|-----------|------------|
| TEST | TEST DIVISION | 1444444444 | 444444444 | |
| CONTRA | TEST DIVISION | 1456321789 | 456321789 | 101 |

10.3.2.4 Group A, B or C Filter Level

To filter report results by Customer (default), Location or Post, double-click to display the related pop-up window and select the desired level.

10.3.2.5 Meal Time Status

To filter report results by meal status (default=All), select one or more statuses, where:

Confirmed indicates that the Employee has used Vantage to report both the Meal Start Time and Meal End Time.

No transaction indicates that the Employee has not used Vantage to report any Meal Times.

Unconfirmed indicates that the Employee has used vantage to report the Meal Start Time but never reported the Meal End Time

| MealTimeStatus |
|----------------|
| All |
| Confirmed |
| No transaction |
| Unconfirmed |
| |
| |
| |

10.3.2.6 Pay Status

You may select Hourly or Salary employees (default=All).

| PayStatus | |
|-----------|--|
| All | |
| Hourly | |
| Salary | |
| | |
| | |
| | |

10.3.2.7 Sort Details By

The report may be sorted by Employee Name (default), Employee No or Post Date.

10.3.2.8 Sort Details Order

The sort order may be either Ascending (default) or Descending.

10.4 Meal Variance Report

The Meal Variance report will show any variance between actual meal times and the expected (default) meal times for each employee. Since this is a variance report, employees who have not taken a meal break are not included.

| TEST DIVISION | | | | | | | | | | | |
|----------------------|-----------------|-------------------------|----------|-------|------------|-------------|-----------------|---------------|------------|--------------|----------|
| Meal Variance Report | | | | | | | | | | | |
| | | | | | | From | 07/19/2006 | To | 07/25/2006 | | |
| Employee Number | Employee Name | Customer | Location | Post | Tour | In - Out | Meal Start Time | Meal End Time | Duration | Meal Default | Variance |
| 12345 | CONTRACTOR, SUB | VALIANT SOLUTIONS, INC. | WOODBURY | LOBBY | 07/19/2006 | 07:00-15:30 | 12:48 | 13:21 | 0:55 | 0:50 | -0:05 |
| 12345 | CONTRACTOR, SUB | VALIANT SOLUTIONS, INC. | WOODBURY | LOBBY | 07/24/2006 | 13:30-20:30 | 13:45 | 14:15 | 0:50 | 0:50 | 0:00 |
| 12345 | CONTRACTOR, SUB | VALIANT SOLUTIONS, INC. | WOODBURY | LOBBY | 07/20/2006 | 13:30-20:30 | 15:00 | 15:30 | 0:50 | 0:50 | 0:00 |

Figure 10-5. Meal Variance Report

10.4.1 Column Descriptions

| Column | Description | Source |
|-----------------|--|---|
| Employee No | The Employee's ID | Employee Master |
| Employee Name | The Employee's last name, first name | |
| Customer | The name of the customer | Customer Master |
| Location | The customer's location | Location Master |
| Post | The post at the customer's location | Post Master |
| Tour | The date of the tour (shift) | Shift (Tour) Master |
| In | The scheduled in time of the tour | Schedule |
| Out | The scheduled out time of the tour | |
| Meal Start Time | The time (hhmm) the employee's meal started (Meal In) | System |
| Meal End Time | The time (hhmm) the employee's meal ended (Meal Out) | |
| Duration | The actual time from Meal Start to Meal End | |
| Meal Default | The scheduled meal time duration | 1. Customer Master>Format Tab 2. Customer Default Master |
| Variance | The difference between the actual duration and the default | System |

10.4.2 Report Filters

| Filter | Setting |
|-------------------------------|---------------|
| Active Status | All |
| Department | All |
| Employee Name | All |
| Group A, B or C Filter Level | Customer |
| Pay Status | All |
| Sort Details By | Employee Name |
| Sort Details Order | Ascending |
| Variance Condition in Minutes | |

Date Range
 Date Start: 07/19/2006 Today Week
 End: 07/25/2006 Today Select Printer Print Preview Close

Vantage/Handlink | Meal Variance Report 7/27/2006 12:51 PM

Report filtering is as described previously for the Meal Status Report, except that the Meal Time Status filter has been replaced by the Variance Condition in Minutes filter.

10.4.2.1 Variance Condition in Minutes

If the difference between an employee's actual meal time and the expected meal time exceeds the specified variance, the employee will appear on the report.

Variance Condition in Minutes

Value

Like Equals

OK Cancel

If no specific variance is specified, the report will list all clock Start and End times for each meal, calculate the duration, compare the duration with the expected Meal Time, and display the difference in minutes.

10.5 Sign In Variance Report

The purpose of this report is to indicate any variances between scheduled Shift Start times and actual employee sign in times.

| Sign In Variance Report | | | | | | | | | | From | 04/06/2006 | To | 07/08/2006 |
|-------------------------|---------------|----------|----------|-----------------|------------|-------|-------|---------|----------|------|------------|----|------------|
| Employee No | Employee Name | Customer | Location | Post | Tour | In | Out | Sign In | Variance | | | | |
| | | | | SECURITY AGENTS | 06/26/2006 | 7:00 | 15:00 | 6:27 | 33 | | | | |
| | | | | SECURITY AGENTS | 06/26/2006 | 15:00 | 23:00 | 14:28 | 32 | | | | |
| | | | | SECURITY AGENTS | 06/26/2006 | 15:00 | 23:00 | 14:32 | 28 | | | | |
| | | | | SECURITY AGENTS | 06/26/2006 | 23:00 | 7:00 | 22:19 | 41 | | | | |
| | | | | MEAL RELIEFS | 06/26/2006 | 16:00 | 17:30 | 16:04 | -4 | | | | |

Figure 10-6. Sign In Variance Report

10.5.1 Column Descriptions

| Column | Description | Source |
|---------------|--|-----------------|
| Employee No | The Employee's ID | Employee Master |
| Employee Name | The Employee's last name, first name | |
| Customer | The name of the customer | Customer Master |
| Location | The customer's location | Location Master |
| Post | The post at the customer's location | Post Master |
| Tour | The date of the tour (shift) | Schedule |
| In | The scheduled in time of the tour | |
| Out | The scheduled out time of the tour | |
| Sign In | The employee's actual in time | System |
| Variance | The difference between the scheduled In time and the actual Sign In time | |

10.5.2 Report Filters

| Filter | Setting |
|--------------------|------------------|
| Account Manager | All |
| Active Status | All |
| Database Year | Current |
| Department | All |
| Employee Name | All |
| Pay Status | All |
| Sort Details By | Sort By Customer |
| Sort Details Order | Ascending |
| Sort Headers | Name |
| Sort Headers Order | Ascending |

Date Range
 Date Start: 04/06/2006 Today Week
 End: 07/08/2006 Today

Select Printer Print Preview Close

Vantage/Handlink | Sign In Variance Report 8/6/2007 3:26 PM

10.5.2.1 Account Manager

The sales representative assigned to the customer.

| AccountManagerNo | Description |
|------------------------------|-------------|
| All | |
| Account Manager Not Assigned | |

10.5.2.2 Active Status

You may select Active or Inactive employees (default=All).

10.5.2.3 Database Year

This filter reports transactions by the year in which the transactions occurred (default=Current).

To report on a different year, double-click Database Year to display the related pop-up window and select the desired year.

| TranYear |
|--------------|
| Current Year |
| 2002 |
| 2003 |
| 2004 |
| 2005 |
| 2006 |

To view the 2005 archived data, for example, select 2005 and enter a Date Range within the 2005 year. This will display the archived data for that year.

10.5.2.4 Department

You may select one or more departments (default=All).

| Department |
|------------|
| All |
| 002100 |
| 009-01 |
| 010000 |
| 010100 |

10.5.2.5 Employee Name

To filter report results by Employee Name (default=All), double-click Employee Name to display the related pop-up window and select one or more employees.

| EmployeeName | Division | EmployeePreml | SSNum | Departmer |
|--------------|---------------|---------------|-----------|-----------|
| TEST | TEST DIVISION | 1444444444 | 444444444 | |
| CONTRA | TEST DIVISION | 1456321789 | 456321789 | 101 |

10.5.2.6 Pay Status

You may select Hourly, Salary or All employees.

Pay Status

Selection

| PayStatus | |
|-----------|--|
| All | |
| Hourly | |
| Salary | |

10.5.2.7 Sort Details By

Sort Details By

Lookup

Sort By Call Date\Call Time

- Sort By Call Date\Call Time
- Sort By UserID\Call Date\Call Time
- Sort By CallerID\Call Date\Call Time

10.5.2.8 Sort Details Order

Sort Details Order

Lookup

Ascending

- Ascending
- Descending

10.5.2.9 Sort Headers

Sort Headers

Lookup

Name

- Name
- Number

10.5.2.10 Sort Headers Order

Sort Headers Order

Lookup

Ascending

- Ascending
- Descending

10.6 Sign Out Variance Report

The purpose of this report is to indicate any variances between scheduled Shift End times and actual employee sign out times.

| Sign Out Variance Report | | | | | | | | | | |
|--------------------------|---------------|----------|----------|------------|------------|-------|------------|----------|----------|------------|
| | | | | | | From | 04/06/2006 | | To | 07/08/2006 |
| Employee No | Employee Name | Customer | Location | Post | Tour | In | Out | Sign Out | Variance | |
| | | | | SUPERVISOR | 06/26/2006 | 22:00 | 6:00 | 5:49 | -11 | |
| | | | | SUPERVISOR | 06/27/2006 | 22:00 | 6:00 | 5:46 | -14 | |
| | | | | SUPERVISOR | 06/28/2006 | 22:00 | 6:00 | 5:45 | -15 | |
| | | | | SUPERVISOR | 07/01/2006 | 22:00 | 6:00 | 5:46 | -14 | |
| | | | | SUPERVISOR | 06/26/2006 | 6:00 | 14:00 | 13:47 | -13 | |

Figure 10-7. Sign Out Variance Report

10.6.1 Column Descriptions

| Column | Description | Source |
|---------------|---|-----------------|
| Employee No | The Employee's ID | Employee Master |
| Employee Name | The Employee's last name, first name | |
| Customer | The name of the customer | Customer Master |
| Location | The customer's location | Location Master |
| Post | The post at the customer's location | Post Master |
| Tour | The date of the tour (shift) | Schedule |
| In | The scheduled in time of the tour | |
| Out | The scheduled out time of the tour | |
| Sign Out | The employee's actual out time | System |
| Variance | The difference between the scheduled Shift End and the actual Sign Out time | |

10.6.2 Report Filters

The screenshot shows the application interface for the Sign Out Variance Report. On the left, a list of reports is displayed, with 'Sign Out Variance Report' selected. Below this list is a 'Date Range' section with 'Date Start' set to 04/06/2006 and 'End' set to 07/08/2006. On the right, a 'Filter' dialog box is open, showing various filters and their settings: Account Manager (All), Active Status (All), Database Year (Current), Department (All), Employee Name (All), Pay Status (All), Sort Headers (Name), and Sort Headers Order (Ascending). At the bottom of the dialog are buttons for 'Select Printer', 'Print', 'Preview', and 'Close'. The status bar at the bottom of the window shows 'Vantage/Handlink | Sign Out Variance Report', the date '8/6/2007', and the time '3:33 PM'.

Report filtering is as described previously for the Sign In Variance Report.

10.7 Unconfirmed Post Report

This report lists all scheduled employees that remain unconfirmed (have not clocked in) at their related post and tour.

| Unconfirmed Post Report | | | | | | |
|-------------------------|---------------|----------|----------|-------------------|------------|-------------|
| Employee No | Employee Name | Customer | Location | Post | Tour | In - Out |
| | | | | SECURITY-SECURITY | 06/05/2006 | 09:00-17:00 |
| | | | | SECURITY-SECURITY | 06/10/2006 | 23:00-07:00 |

Figure 10-8. Unconfirmed Post Report

10.7.1 Column Descriptions

| Column | Description | Source |
|---------------|--------------------------------------|-----------------|
| Employee No | The Employee's ID | Employee Master |
| Employee Name | The Employee's last name, first name | |
| Customer | The name of the customer | Customer Master |
| Location | The customer's location | Location Master |
| Post | The post at the customer's location | Post Master |
| Tour | The date of the tour (shift) | Schedule |
| In | The scheduled in time of the tour | |
| Out | The scheduled out time of the tour | |

10.7.2 Report Filters

| Filter | Setting |
|------------------------------|-----------|
| Account Manager | All |
| Active Status | All |
| Department | All |
| Employee Name | All |
| Group A, B or C Filter Level | Customer |
| GroupA | All |
| GroupB | All |
| GroupC | All |
| Pay Status | All |
| Sort Headers | Name |
| Sort Headers Order | Ascending |

10.7.2.1 Account Manager

The sales representative assigned to the customer.

| AccountManagerNo | Description |
|------------------------------|-------------|
| All | |
| Account Manager Not Assigned | |

10.7.2.2 Active Status

You may select Active or Inactive employees (default=All).

10.7.2.3 Department

You may select one or more departments (default=All).

10.7.2.4 Employee Name

To filter report results by Employee Name (default=All), double-click Employee Name to display the related pop-up window and select one or more employees.

| EmployeeName | Division | EmployeePreml | SSNum | Departmer |
|--------------|---------------|---------------|-----------|-----------|
| TEST | TEST DIVISION | 1444444444 | 444444444 | |
| CONTRA | TEST DIVISION | 1456321789 | 456321789 | 101 |

10.7.2.5 Group A, B or C Filter Level

To filter report results by Customer (default), Location or Post, double-click to display the related pop-up window and select the desired level.

10.7.2.6 Group A

The Location tab of the Location Master provides for three user-definable lookup fields: GroupA, GroupB and GroupC. The labels for these fields are specified in the Division Settings.

| GroupAND | Description |
|---------------------|-------------|
| All | |
| GroupA Not Assigned | |
| DEFAULT | DEFAULT |

10.7.2.7 Group B

The Location tab of the Location Master provides for three user-definable lookup fields: GroupA, GroupB and GroupC. The labels for these fields are specified in the Division Settings.

| GroupBNO | Description |
|---------------------|-------------|
| All | |
| GroupB Not Assigned | |

10.7.2.8 Group C

The Location tab of the Location Master provides for three user-definable lookup fields: GroupA, GroupB and GroupC. The labels for these fields are specified in the Division Settings.

| GroupCNO | Description |
|---------------------|-------------|
| All | |
| GroupC Not Assigned | |
| DEFAULT | DEFAULT |

10.7.2.9 Pay Status

You may select Hourly or Salary employees (default=All).

| PayStatus | |
|-----------|--|
| All | |
| Hourly | |
| Salary | |

10.7.2.10 Sort Headers

Lookup

Name

Name

Number

10.7.2.11 Sort Headers Order

Lookup

Ascending

Ascending

Descending

11. Vision Reports

11.1 Tour Transaction Detail

The Vision Tour Transaction Detail lists “Meal In” and “Meal Out” times for each employee included in the report. It also provides a summary of scheduled and total hours by post, location and customer.

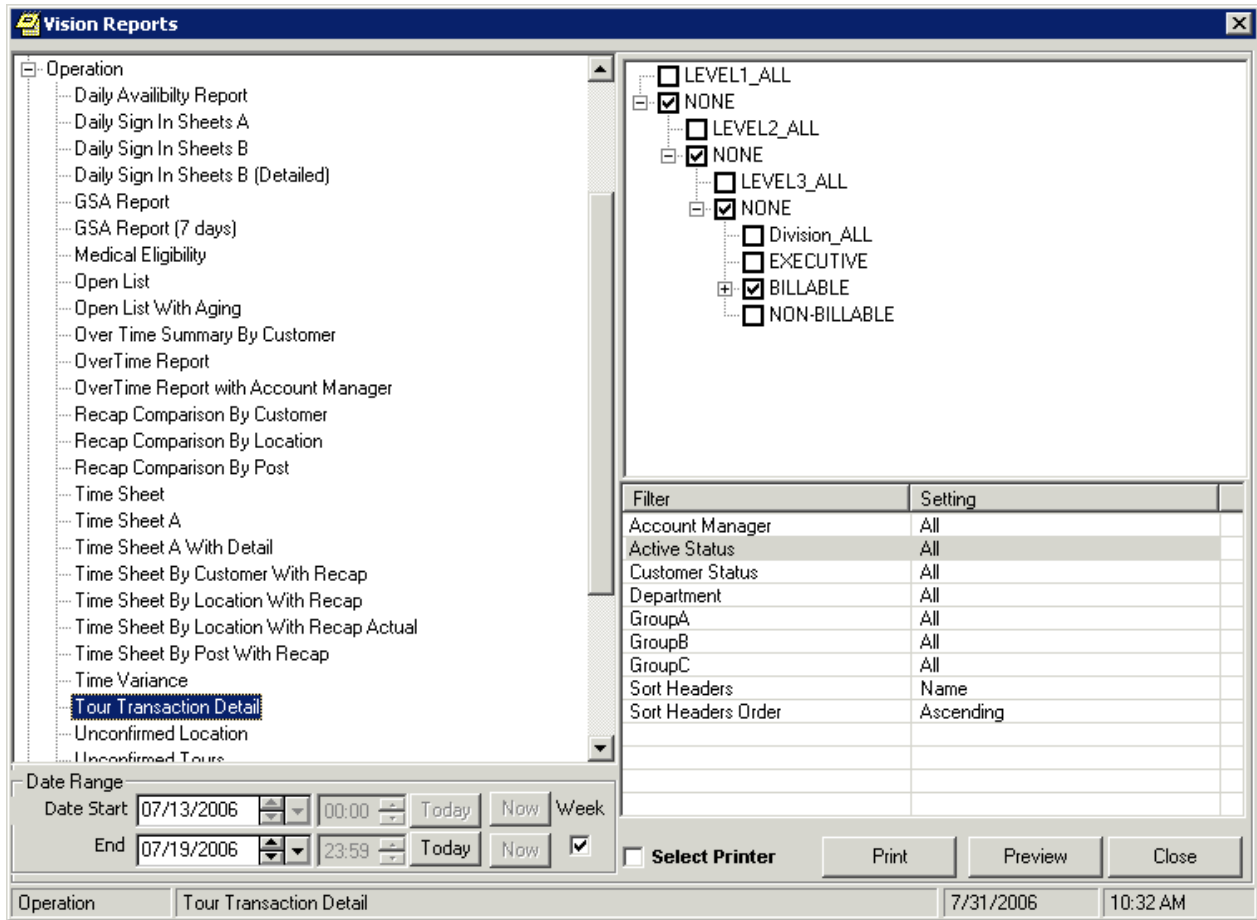
| BILLABLE | | | | | | | | | | | |
|--|----------------|----------|----------------|------------------------------|-------|-------|-------|----------------------------|---------|---------------|------------|
| Tour Transaction Detail | | | | | | | | | | | |
| Customer No/Name: TEST-000 100-VALIANT TEST CUSTOMER | | | | Start Date: 07/19/2006 00:00 | | | | End Date: 07/19/2006 23:59 | | | |
| Date | Employee Name | Location | Post | Tour | Clock | | Meal | | Source | Schedule Hrs. | Total Hrs. |
| | | | | | In | Out | In | Out | | | |
| 07/19/2006 | LASTNAME FIRST | MAIN | RECEPTION DESK | 23:00 - 07:30 | 23:00 | 07:30 | 05:00 | 05:30 | VANTAGE | 8.50 | 8. |

Figure 11-1. Tour Transaction Detail

11.1.1 Column Descriptions

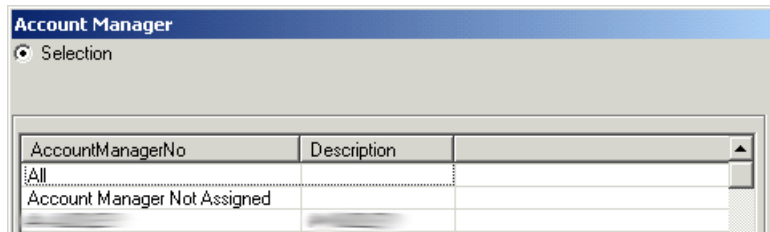
| Column | Description | Source |
|---------------|---|------------------|
| Customer No | The Customer ID | Customer Master |
| Name | The name of the customer | |
| Date | The transaction date | System |
| Employee Name | The Employee’s last name, first name | Employee Master |
| Location | The customer’s location | Location Master |
| Post | The post at the customer’s location | Post Master |
| Tour | The start and end times of the tour (shift) | Tour Week Master |
| Clock In | The employee’s actual “Shift Start” time | System |
| Clock Out | The employee’s actual “Shift End” time | |
| Meal In | The employee’s actual “Meal Start” time | |
| Meal Out | The employee’s actual “Meal End” time | |
| Source | The source of the start and end times (Vantage or Handlink) | |
| Schedule Hrs | The number of hours between “Shift Start” and “Shift End” | |
| Total Hrs | The number of worked hours in the tour | |

11.1.2 Report Filters



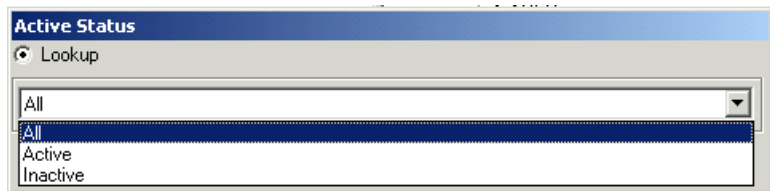
11.1.2.1 Account Manager

The sales representative assigned to the customer.



11.1.2.2 Active Status

You may select Active or Inactive employees (default=All).



11.1.2.3 Customer Status

You may select one or more customer statuses (default=All).

| CustomerStatus | |
|-----------------|--|
| All | |
| Intermittent | |
| Office | |
| Permanent | |
| Special Service | |
| Temporary | |

11.1.2.4 Department

You may select one or more departments (default=All).

| Department | |
|------------|--|
| All | |
| 002100 | |

11.1.2.5 Group A

The **Location** tab of the Location Master provides for three user-definable lookup fields: GroupA, GroupB and GroupC. The labels for these fields are specified in the Division Settings.

| GroupAND | Description |
|---------------------|-------------|
| All | |
| GroupA Not Assigned | |
| DEFAULT | DEFAULT |

11.1.2.6 Group B

The **Location** tab of the Location Master provides for three user-definable lookup fields: GroupA, GroupB and GroupC. The labels for these fields are specified in the Division Settings.

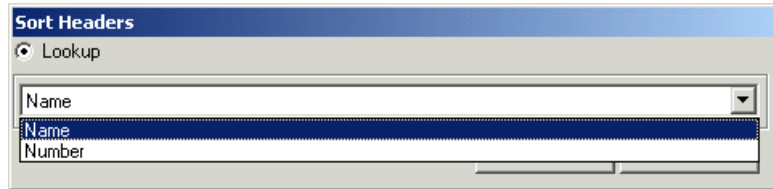
| GroupBNO | Description |
|---------------------|-------------|
| All | |
| GroupB Not Assigned | |
| DEFAULT | DEFAULT |

11.1.2.7 Group C

The **Location** tab of the Location Master provides for three user-definable lookup fields: GroupA, GroupB and GroupC. The labels for these fields are specified in the Division Settings.

| GroupCNO | Description |
|---------------------|-------------|
| All | |
| GroupC Not Assigned | |
| DEFAULT | DEFAULT |

11.1.2.8 Sort Headers



Sort Headers

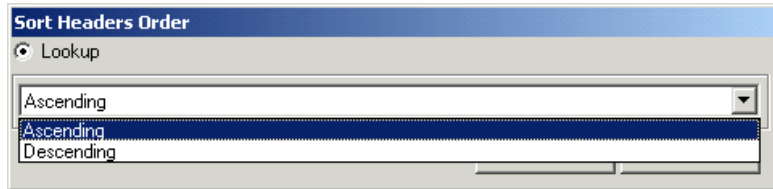
Lookup

Name

Name

Number

11.1.2.9 Sort Headers Order



Sort Headers Order

Lookup

Ascending

Ascending

Descending

11.2 Tour Transaction Hours Paid and Billed Report

This report is of particular interest to clients utilizing telephone or biometric devices to collect employee time in and time out, namely the Vantage™ telephone check-in system and/or HandLink™ users.

Although similar to the schedule-related Tour Transaction Detail Report, the Tour Transaction Hours Paid and Billed Report is concerned with employee hours as they relate to payroll and billing.

| BILLABLE | | | | | | | | | | | | |
|---|---------------|-----------------|---------------------------|---------------|-------------|-----|------------------------------|-------|----------------------------|----------------|--------------|--------------|
| Tour Transaction Hours Paid and Billed Report | | | | | | | | | | | | |
| Customer No/Name: | | TEST-000 | 100-VALIANT TEST CUSTOMER | | | | Start Date: 07/05/2006 00:00 | | End Date: 07/11/2006 23:59 | | | |
| Date | Employee Name | Location | Post | Tour | Actual Time | | Approved Time | | Source | Schedule Hours | Paid Hours | Billed Hours |
| | | | | | In | Out | In | Out | | | | |
| 07/05/2006 | OPEN, SYSTEM | 123 MAIN STREET | WEAPONS TRAINING | 08:00 - 16:00 | | | 08:00 | 16:00 | | 8.00 | 7.50 | 7.50 |
| 07/06/2006 | OPEN, SYSTEM | 123 MAIN STREET | WEAPONS TRAINING | 08:00 - 16:00 | | | 08:00 | 16:00 | | 8.00 | 7.50 | 7.50 |
| 07/07/2006 | OPEN, SYSTEM | 123 MAIN STREET | WEAPONS TRAINING | 08:00 - 16:00 | | | 08:00 | 16:00 | | 8.00 | 7.50 | 7.50 |
| 07/08/2006 | OPEN, SYSTEM | 123 MAIN STREET | WEAPONS TRAINING | 08:00 - 16:00 | | | 08:00 | 16:00 | | 8.00 | 7.50 | 7.50 |
| 07/09/2006 | OPEN, SYSTEM | 123 MAIN STREET | WEAPONS TRAINING | 08:00 - 16:00 | | | 08:00 | 16:00 | | 8.00 | 7.50 | 7.50 |
| 07/10/2006 | OPEN, SYSTEM | 123 MAIN STREET | WEAPONS TRAINING | 08:00 - 16:00 | | | 08:00 | 16:00 | | 8.00 | 7.50 | 7.50 |
| 07/11/2006 | OPEN, SYSTEM | 123 MAIN STREET | WEAPONS TRAINING | 08:00 - 16:00 | | | 08:00 | 16:00 | | 8.00 | 7.50 | 7.50 |
| Summary for WEAPONS TRAINING: | | | | | | | | | | 56.00 | 52.50 | 52.50 |
| Summary for 123 MAIN STREET: | | | | | | | | | | 56.00 | 52.50 | 52.50 |
| Summary for 100-VALIANT TEST CUSTOMER: | | | | | | | | | | 56.00 | 52.50 | 52.50 |

Figure 11-2. Tour Transaction Hours Paid and Billed Report

11.2.1 Column Descriptions

| Column | Description | Source |
|-------------------|---|------------------|
| Customer No | The Customer ID | Customer Master |
| Name | The name of the customer | |
| Date | The transaction date | System |
| Employee Name | The Employee's last name, first name | Employee Master |
| Location | The customer's location | Location Master |
| Post | The post at the customer's location | Post Master |
| Tour | The start and end times of the tour (shift) | Tour Week Master |
| Actual Time In | The employee's actual "Shift Start" time | System |
| Actual Time Out | The employee's actual "Shift End" time | |
| Approved Time In | The employee's actual "Shift Start" time after rounding rules applied | |
| Approved Time Out | The employee's actual "Shift End" time after rounding rules applied | |
| Source | The source of the start and end times (Vantage or Handlink) | |
| Schedule Hours | The number of hours between "Shift Start" and "Shift End" | |

| Column | Description |
|--|-------------|
| <p>Paid Hours Calculated based on the flag 'Payroll Meal' on the Billing Option tab of the Post Master. If Payroll Meal is set <input checked="" type="checkbox"/>, hours calculated will include the meal time.</p> <p>If not set <input type="checkbox"/>, hours are calculated as actual hours minus Default Meal Time (if specified).</p> | |
| <p>Billed Hours Calculated based on the flag 'Bill Meal' on the Billing Option tab of the Post Master. If Bill Meal is set <input checked="" type="checkbox"/>, hours calculated will include the meal time.</p> <p>If not set <input type="checkbox"/>, hours are calculated as actual hours minus Default Meal Time (if specified).</p> | |

11.2.2 Report Filters

| Filter | Setting |
|--------------------|-----------|
| Account Manager | All |
| Active Status | All |
| Customer Status | All |
| Department | All |
| GroupA | All |
| GroupB | All |
| GroupC | All |
| Sort Headers | Name |
| Sort Headers Order | Ascending |

Date Range: Date Start: 05/13/2006 00:00 Today Now Week; End: 05/19/2006 23:59 Today Now

Select Printer Print Preview Close

Operation: Tour Transaction Hours Paid and Billed Report 10/9/2006 2:49 PM

Report filtering is as described previously for the Tour Transaction Detail.

12. Vantage Setup Form



Implementation Services

Vantage Setup Form

| | | |
|---------------------------------------|------------------|----------------------------|
| Customer Name | Customer Number | Division ¹ |
| Customer Contact | Contact Phone | Est. # of Calls/mo |
| States of Operation | # Employees | Setup Date |
| Agreements Recv'd & Signed By Client* | Vantage Team** | Live Date |
| 800 Number ² | Internal Phone # | Vision Server ³ |
| Database Name ⁴ | Call Rate | Call Out Rate |

* Signature of Authorized Valiant Representative

** Signature of Vantage Team Representative

System Options

Link Field⁵: Social Security Number Employee Number

- No Sign-In Early¹⁰ Create Shift¹⁵ Numeric Pager²⁰
- No Sign-Out Late¹¹ Meal Breaks¹⁶ Cell Phone Function²¹
- Pre-Tour Check-In¹² Paging Function¹⁷ Multi-Lingual²²
- Tour Check-In¹³ Check Unconfirmed¹⁸
- Disable Schedule Lookup¹⁴ Check Unconfirmed Openings¹⁹

Field References

| | | |
|----|----------------------------|---|
| 0 | Division | The Division that the phone line is attached to (set to 0 for All Divisions). |
| 1 | 800 Number | The Toll Free Number that is mapped to the phone line. |
| 2 | Vision Server | SQL Server - Location of the client database. |
| 3 | Database Name | Database Prefix of the client. |
| 4 | Link FkId | Set of lines that the employees will use their SSN or EIT1 Employee Number to identify themselves when placing calls. |
| 5 | Dispatch Number | Number that Vantage will direct the employee to call for help/problems. |
| 6 | Schedule Range | Number of minutes before or after the scheduled start time that it is acceptable to dock in without being docked in "Early" (before this time) or docked out "late" (after his time). Calls within this range will result in the employee being docked in at the scheduled start time. Calls outside this range will apply the actual clocked time based on the business rules. |
| 7 | Allow Range | Number of minutes before or after the scheduled shift starts and ends that an employee is allowed to place a successful call in/out outside of the allow range. All not be permitted. Message indicates that the employee is "not scheduled at this time" and directs them to contact the communications center. These calls will be marked as "No Schedule" on reports. |
| 8 | Rounding Rule | Number of minutes to round the actual clocked time. Default Rule = 15 mins Example: Actual time of 8:07 rounds to 8:00. A time of 8:08 rounds to 8:15. |
| 9 | No Sign-In Early | If set, on early check-ins, the clock in time is set to the tour start. |
| 10 | No Sign-Out Late | If set, on late checkouts, the dock out time is set to the tour end. |
| 11 | Pre-Tour Check-in | If set, the user will hear the prompt for this option. |
| 12 | Tour Check-in | If set, the user will hear the prompt for this option. |
| 13 | Disable Schedule Lookup | Does not give the caller the message that they are not scheduled. Just clocks the employee in, No Schedule change can be made. |
| 14 | Create Shift | If set, the user will have the option to create a Temporary Tour Starting at the call time. |
| 15 | Meal Breaks | If set, the user will have the option to dock in and out for a break during their shift. (Vision Division Settings will determine time capture rules) |
| 16 | Paging Function | If set, allows the user to page the Supervisor via Vantage. Looks up the number under the supervisor in the location file. |
| 17 | Check Unconfirmed | If set, system will look at Vision's Schedule and send out notifications if posts do not have confirmed employees. |
| 18 | Check Unconfirmed Openings | If set, system will send out notifications for openings that are not filled and confirmed. |
| 19 | Numeric Pager | If set, system will transmit "Tones" for the callback number. Otherwise, the system will "speak" the Callback number to a telephone. |
| 20 | Cell Phone Function | If set, allows the user to send a voice message to the supervisor via Vantage. |
| 21 | Multi-lingual | Allows employees to hear prompts in English or Spanish. |
| 22 | Messaging User | The user number to enter to access Vantage Messaging. |
| 23 | Messaging Password | The user password to enter to access Vantage Messaging. |