

Sirenum Demo Preparation

1.0 Business Analysis/Requirement Gathering

First step to creating a demo is to review our target audience and create an appropriate dataset for the demo. The more tailored and “real” the data we use in our demo org, the less mental agility is required from our clients. This means that they can focus on the functionality, rather than having to internally adjust the demo for their own unique use cases.

Key areas to research:

1.1 Sites/Locations: both globally and specific work locations. What timezone, currency, and units of measurement will they be most familiar with?

1.2 Agency/Staffing or Corporate? Is the client a recruitment agency, supplying workers to clients or are they a company looking for rostering for their own workforce?

1.3 Industry: what are the basic compliance expectations within this sector?

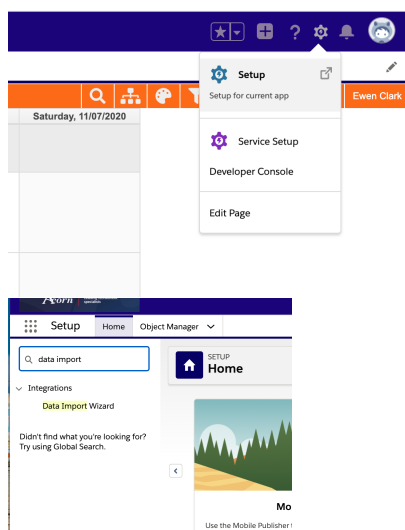
1.4 Business requirements/pain points: eg. is payroll appropriate? Is it fast-paced shift fulfilment or direct corporate resource allocation?

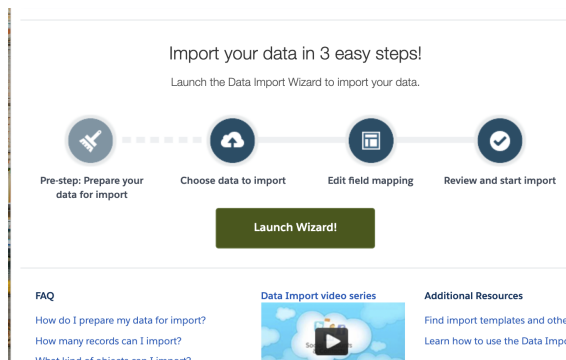
1.5 Regional compliance: does the client’s company operate in a country with mandatory work breaks, AWR requirements, union provisions?

1.6 Target audience: which stakeholders within the client business are present for the demo and what are their particular interests? Eg. a CIO will be concerned with integration, Ops with ease of adoption etc.

2.0 Data Import Wizard

Once we have decided on our accounts, sites, job roles, contacts etc, we can start cleaning the data for import using the Salesforce Data Import Wizard. Up to 50,000 records can be imported at once. See below for how to access the Data Import Wizard.





Using the “All Objects for Import” Template will give you the correct object import order and fields you need to populate a demo of any size and complexity.

Some key areas to consider:

- Remember the data hierarchy: certain objects must be imported first. For example, there are fields on job roles that are lookup fields from accounts, it is therefore required that accounts are imported first.
- Fields in the spreadsheet must correlate to fields on the object. The fields can be manually mapped at the import stage, but it is faster to make sure the data is clean before import
- Remember to use the matching service to link master-detail relationships and lookup fields before importing the csv file. If you are using text names (for example, a competency called “Right to Work”), ensure that you are mapping to the competency name, not the Salesforce ID
- Keep it structured and simple! The order of import is important, so check the import reports: if records have failed then any subsequent objects that relate to those failed records will not populate correctly.
- Remember that the import tool uses .csv file format. This is text only, so no formulae will be imported, and names etc must be exact.

2.1 Required Import Data for Demos

2.1.1 Accounts: These will be the client’s clients: think of who their current or target customers are. We suggest creating only one account for a demo.

2.1.2 Sites: These are the locations for work. They will need to use actual addresses in order for the map function to work. Ensure that for demo purposes they are all within a similar area, 4 or 5 will suffice.

2.1.3 Job Types: A wider “bucket” for job roles. An example might be if you have three job roles (HGV Driver, Nighttime Driver, TIR Driver) they would all come under the umbrella of “Driver” job type.

2.1.4 Contracts: These can be seen as cost centres. They contain billing information such as PO numbers. For a demo, it is normally recommended that only one or two contracts are created and all jobs linked to them.

2.1.5 Job Roles: The different jobs that workers will be assigned to, eg. carpenter, labourer, electrician. As many as you deem appropriate can be used, we suggest no more than 10.

2.1.6 Contacts: These are your workers. Sirenum has two record types for contacts: “client contact” and “contact”. Only contacts will be available in the scheduler, so make sure this is the record type. Contacts can be given email addresses, mobile numbers, default job roles and sites. Use <https://www.fakenamegenerator.com/order.php> to quickly create bulk loads of random names with contact information. The contacts will also need addresses for the full functionality of the matching engine and map to work. You can manually add in addresses, or use the “Contact Geolocation” tool in the import template to randomise them. We suggest creating 20-50 contacts.

2.1.7 Competencies: These can be qualifications, skills, right to work checks, inductions for specific sites. Any competency named “induction” will automatically populate a tab on the compliance page under “inductions”. Competencies can have an expiration and require proof. It is suggested you create at least 3 competencies to give a real feel to the data.

2.1.8 Competency Conditions: These are what links competencies to particular shifts (through account, job role, etc). You must also state the “Severity” of the condition (i.e. if the assigned worker is missing this competency, what alert will the scheduler give us?). These can be: fatal, high, medium, and low. Do not give one competency multiple fields, instead copy it to a new row and add the appropriate field. Remember that the data hierarchy applies to this: eg. if I want to give “Right to Work” to an account, all related job roles etc will also apply.

2.1.9 Tickets: Tickets are competencies assigned to individual contacts. It is suggested that you give all your contacts all the competencies that you are importing, and then delete the appropriate ones manually in Salesforce to give the compliance alerts that you require.

3.0 Setting up MySirenum

MySirenum is the app that allows workers to interact with and be communicated with by Sirenum. It is an integral part of the Sirenum platform and it is important that it is correctly configured for your demos.

If you are using an existing Salesforce org rather than creating a new one from TSO you have to create a site to connect MySirenum to the org. Please get in touch with the MySirenum support team at mysirenumpsupport@sirenum.com to do this.

3.1 Using MySirenum in the Demo

First, we have to consider who our “golden contact” is. This is the contact that will be the user of MySirenum and must be our most suitable candidate for the shift we create to demo the “open shift” capabilities. Therefore, this contact must have all the relevant compliance,

live close to the site, have previously worked in similar shifts, and any other factors that affect the matching engine.

Once we have decided who this contact is (we suggest using the contact who appears at the top of your scheduler page, which is sorted alphabetically eg. Abbie Aitkinson), we only need to enter values into “email address” and “client password” in the appropriate fields on their record page. The email address must be unique across your org but does not have to be valid, as long as you remember the client password (eg. 1234). This has then created a log in for the contact with MySirenum.

You can now download MySirenum using your phone’s app market. Once it is downloaded, enter in the email address you set for the “golden contact” and press on the “reload companies” button below the log in area. Once the process is complete, you can then enter the password previously set. Voila! You are now a registered worker at your demo org.

You must be able to mirror your phone screen on the device you are demonstrating on.

4.0 Objects to populate within Sirenum

Now that we have MySirenum activated, before we move to building our demo flow, there are two objects we need to populate. These are a rate card and a shift template.

4.1 Rate Card

The rate card will enable us to demonstrate Sirenum’s gross pay, forecast pay and invoicing functionality. This is actually a set of objects, consisting of “rate cards”, “rate card pages” and “rate card lines”. For the 15 minute demo, we only require the default rate card page, but we will need at least one “rate card line”.

4.1.1 Rate Card

To create a rate card, the easiest way is to create from the job role record page. These all have to be created individually, for the purpose of a 15 minute demo we only require one, that we can then apply to all the job roles in our demo org.

Go to the job role:

The screenshot shows the 'Job Role' record page for 'Doorman'. The page is divided into 'Related' and 'Details' sections. The 'Details' section contains various fields with edit icons. A red box highlights the 'Rate Card' field, which currently shows '1'.

Related	Details
Job Role Doorman	Phone
Timesheet Supervisor	Job Role Team Leader
Time Entry Method	Inactive
Contract Front of House Cost Centre (Forrest)	Comments
Rota	Assignment Signatures Required
Colour Code	Rate Card
Maximum Fatigue Index	

The screenshot shows a 'Rate Card' selection modal. It has a search bar at the top and a list of rate cards below. A red box highlights the '+ New Rate Card' button at the bottom.

Rate Card

Search Rate Cards...

- Inbound Unloader Rate Card
- Outbound Loader Rate Card
- Machine Operator Rate Card
- Live-in Carer Rate Card
- Picker/Packer Rate Card
- + New Rate Card

Job Role
Doorman

Colour Code

Maximum Fatigue Index

Maximum Risk Index

Default Payroll Role ☐

Job Role Number

Scheduling Group

Job Type

Search Job Types...

Rate Card
Room Attendant Rate Card

Cancel Save

New Rate Card

Information

* Rate Card Name Owner Sarah Williams

Cancel Save & New Save

4.1.2 Rate Card Line

We will create two rate card lines for this demo- a daytime and a nighttime. Click on the Rate Card that you have created. Scroll down until you find the below area of the rate card.

Conditions

Field Operator Value

Rate Settings

Add Rate Line Rates Overtime Advanced

Standard Rate Name	Code	Day Type	Start Hour	End Hour	Rate Modifier	Pay Rate	Charge Rate	Actions
<p>Save Clone Delete</p>								

Used By

Rate Affects

Click “add rate card line” and select “custom”. Enter in a code such as “Sacred Heart Daytime”

Valid From [01/07/2020] Valid Until [01/07/2020]

Shift
Daily
Weekly

Create Rate Line

Enter new Rate Code

Cancel Create

--None--

Rates Overtime Advanced

Code	Day Type	Start Hour	End Hour	Rate Modifier	Pay Rate	Charge Rate	Action
<p>Save Clone Delete</p>							

When you have created the two rate card lines, you can then enter in the pay and charge rates. We suggest using the figures below, but this is up to you, depending on location etc.

Conditions

Field Operator Value

--None--

Rate Settings

Add Rate Line Rates Overtime Advanced

Standard Rate Name	Code	Day Type	Start Hour	End Hour	Rate Modifier	Pay Rate	Charge Rate	Actions
Custom	baylor scott daytime	Any Day	06:00	17:00	Regular	13.50	15.76	
Custom	baylor scott nighttime	Any Day	17:00	06:00	Regular	14.50	18.32	

Save Clone Delete

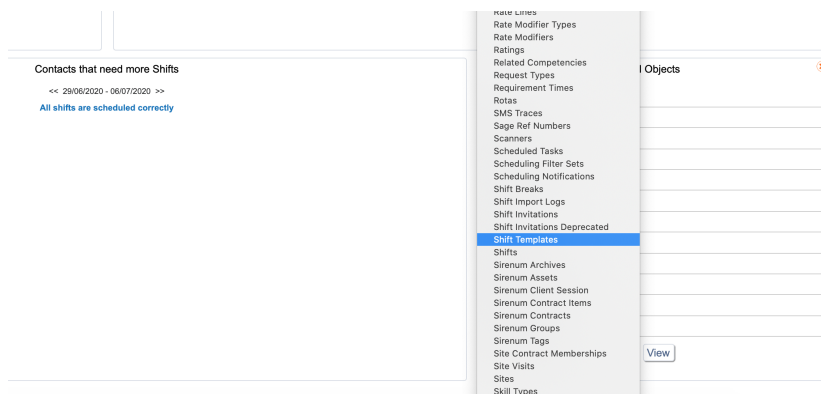
Used By

4.1.3 Applying to all jobs

Your rate card has now been completed. This means that all actual hours will have associated charges. To add these to all your job roles, simply load the job role record and add to the lookup box “rate card”, as in section 4.1.1.

4.2 Shift Templates

The shift template is a key part of demonstrating Sirenum’s capabilities to rapidly take in a shift requirement, populate it with the relevant rate, compliance and information data, and then be published to the workforce using Open Shift. Follow the process below to create a shift template. Bear in mind that it can be edited from the scheduler to create a shift demand within two hours of the demo time.



Fill out the relevant information and click save. Make sure that only the shift templates you wish to demo are “enabled” using the checkbox below.

5.0 Demo Flow

The following is a guide, and may change based on the individual circumstances of the demo. However, it is advisable to follow the basic steps to ensure a smooth and natural flow that integrates into your narrative. There may be particular situations, decided in your research and analysis phase, that require particular focus on one module or that make a standard demo segment irrelevant.

To begin your demo, keep the primary objects or pages that you will demonstrate open as tabs. This will reduce loading time and you can ensure that the correct information will be displayed. As we normally look at three primary areas, we suggest you have three tabs open. The areas we suggest demoing are as follows:

Maps - **Scheduler/MySirenum** - **Dashboard**

As a general guide, in a 15 minute demo 3-5 minutes will be spent on introductions and the map, 7-10 minutes on the scheduler/MySirenum, and 1-3 minutes on the dashboard.

6.0 Maps

The default view on the map is “Shifts Starting in the Next Two Hours”. We suggest that you only demo this view and do not use any other functionality within the maps module. A pin represents a location where a shift is happening. The colour represents the most severe shift at that location.

The key thing is to have one pin at each site that is a different colour. Remember that the most severe warning colour will automatically go to the top, so ensure there are no red shifts where you wish your green shift to appear, for example.

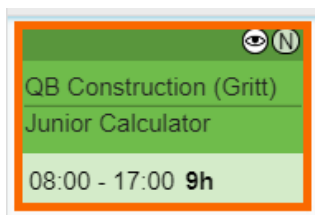
6.1.1 How to get one of each key colour

Remember:

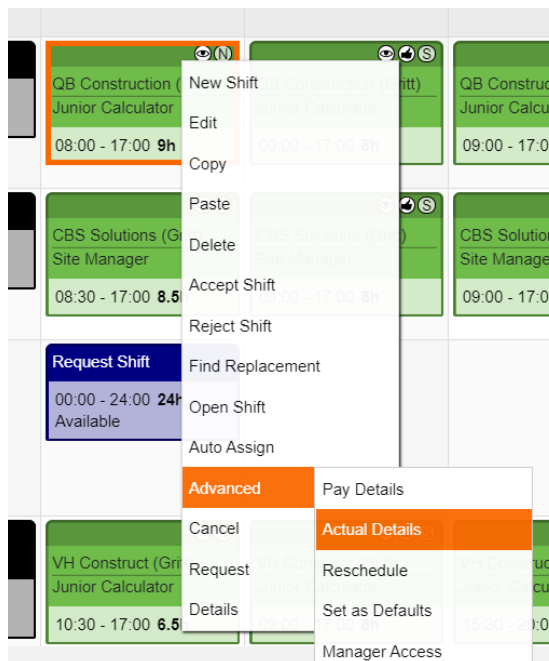
1. Each shift that you create must be at different sites
2. Make sure there are no ‘Shift Demands’ in the ‘Requirements’ bar on scheduler
3. If you have ‘Shifts’ happening the day before your demo - make sure they all end around 4pm. Otherwise they appear in your map.

6.1.1.1 Green:

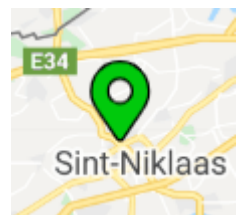
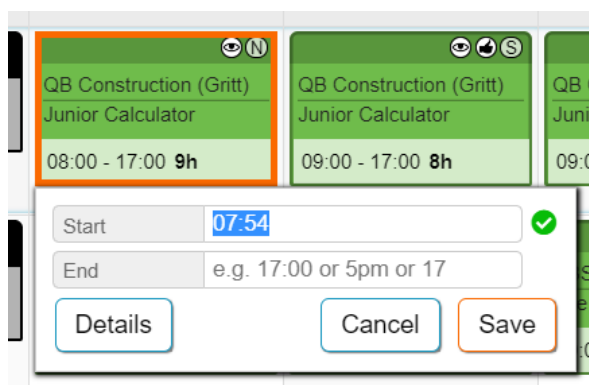
- Create a shift - starting earlier in the day:



- Add the ‘Actual Hours’ - right click on the shift - scroll down to ‘Advanced’ - click ‘Actual Details’

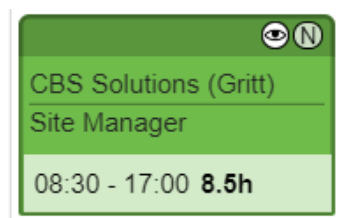


- Add actual start time:

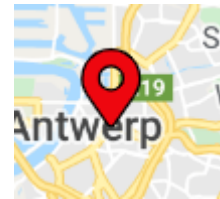
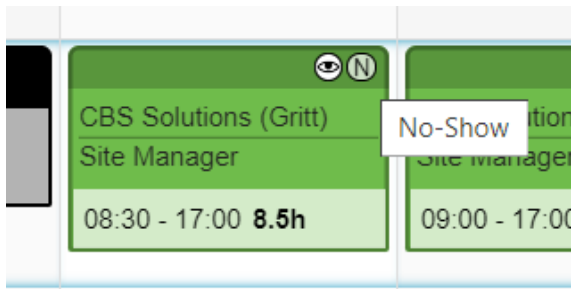


6.1.1.2 Red:

- Create a shift - starting earlier in the day:



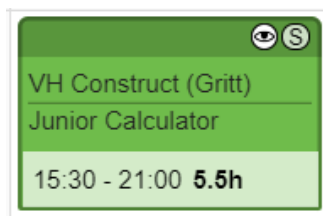
- And that creates the red pin, simple!



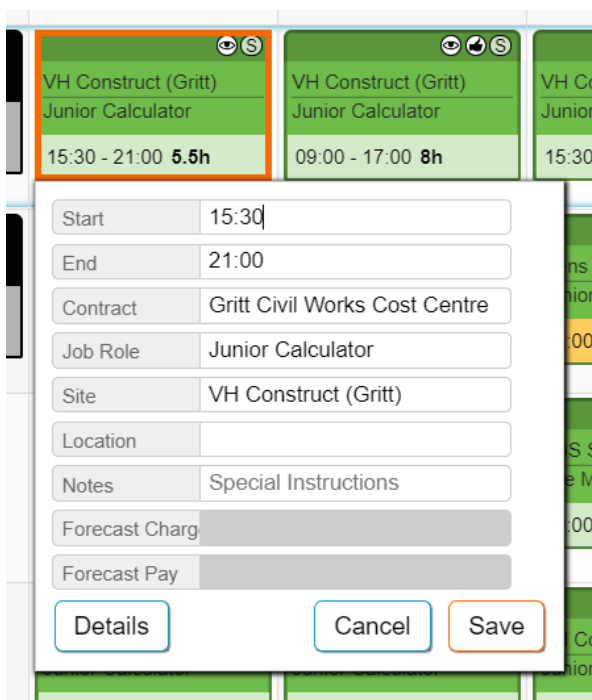
6.1.1.3 Blue:

- Create a 'Shift' that is within 2 hours of the start time of the demo

Example - Demo starts at 2pm:



- Left click on the shift



- Click on the 'Details' button:

VH Construct (Gritt) Junior Calculator 15:30 - 21:00 5.5h	VH Construct (Gritt) Junior Calculator 09:00 - 17:00 8h	VH C Junio 15:30
--	--	------------------------

Start

15:30

End

21:00

Contract

Gritt Civil Works Cost Centre

Job Role

Junior Calculator

Site

VH Construct (Gritt)

Location

Notes

Special Instructions

Forecast Chrg

Forecast Pay

Details

Cancel

Save

- In the shift object, scroll down to 'Statuses' and add 'Confirmed Tim' Date and Time:

▼

Statuses

Employee Acceptance ⓘ

0

Confirmed Time ↺

Date

Time

- Don't forget to 'Save'

▼

Statuses

Employee Acceptance ⓘ

0

Confirmed Time ↺

Date

08/06/2020

Time

13:15

Published ⓘ

☒

Ever Published

☒

Shift Status

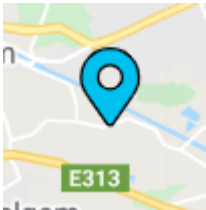
Scheduled

This field is calcul

Comments

Cancel

Save



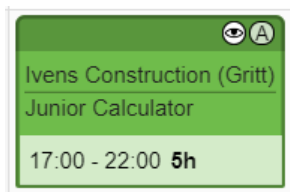
▼

Time & Attendance

6.1.1.4 Yellow:

- Create a 'Shift' that is within 2 hours of the start time of the demo

Example - Demo starts at 3:30pm:



The shift is 'at risk' and you will now have four pins visible on the map.

7.0 Scheduler

The scheduler is the “beating heart” of Sirenum. As seen in section 4.1 (“Maps”), most of the wider functionality is drawn from information that is inputted into the scheduler. There are three key areas that we need to prepare the scheduler for: shifts, employee requests, and “Open Shift”- the matching engine that links workers to scheduled shifts.

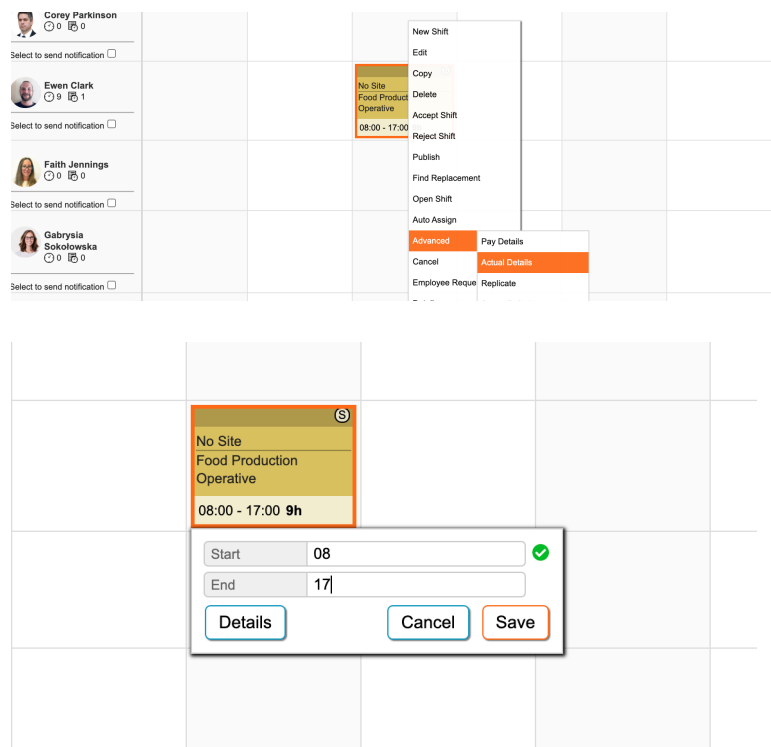
7.1.1 Shifts

Using the method in section 4.1, we can create shifts in the scheduler. It is a good idea to start on the current week and give each of your contacts shifts with the same role, site and similar times. Remember that once created, shifts must be saved, either by clicking on the save icon in the top left corner, or Ctrl/Cmd+S. Shifts in the past should be published: again select all the shifts on that week and Ctrl/Cmd+B). It is also important to add in actual hours, using the process below. This will generate data for reporting, and mean that the matching engine finds the right candidates for the shift. Make sure that the candidates that you wish to find using open shift do not have shifts that overlap with the shift template time.

7.1.2 Golden Contact Shifts

This is particularly important for your “golden contact”: this ensures that when we demo the “open shift” capability, the contact that is logged into your MySirenum will be the best match for the shift we will publish to them. As we demo the open shift function using the shift that is selected in the shift template, make sure that the shifts you give to the golden contact are the same as those you have chosen to use in the template.

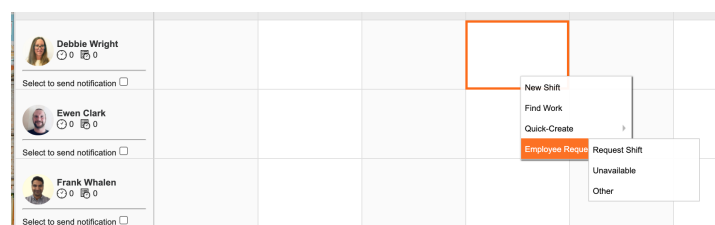
Shifts in the past should be published: select all the shifts on that week (Ctrl/Cmd+A) and publish using (Ctrl/Cmd+B). It is also important to add in actual hours, using the process below. This will generate data for reporting, and mean that the matching engine finds the right candidates.

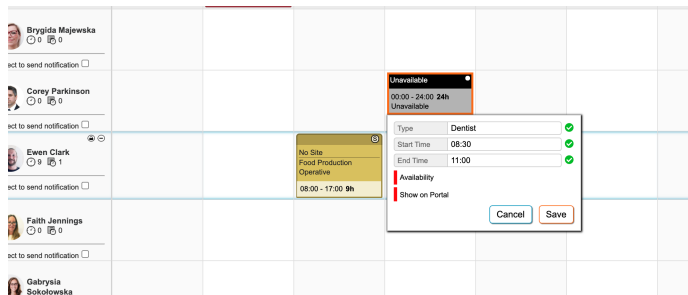


Once this is complete, a clock icon will appear on the shift. Hovering the mouse over it will show the actual hours you input into it.

7.2 Employee Requests

It is advised to create a variety of employee requests to demonstrate Sirenum's ability to capture these. Using the 5 or 6 contacts at the top of the list, follow the process below to create a holiday, unavailability, and request shifts. It is worth editing one of the unavailable requests to be a specific time and reason (i.e. Dentist, 08:30-11:30) to show that this is possible.





7.3 Populating Historic Shifts and Requests

The easiest way to create historic shifts is to copy all (Ctrl/Cmd+A) the current week's shifts and paste (Ctrl/Cmd+V) into the previous weeks. We suggest doing this for 4 weeks in the past. Again, this will generate data for reporting, and mean that the matching engine finds the right candidates. Make sure all have actual hours and are published as well.

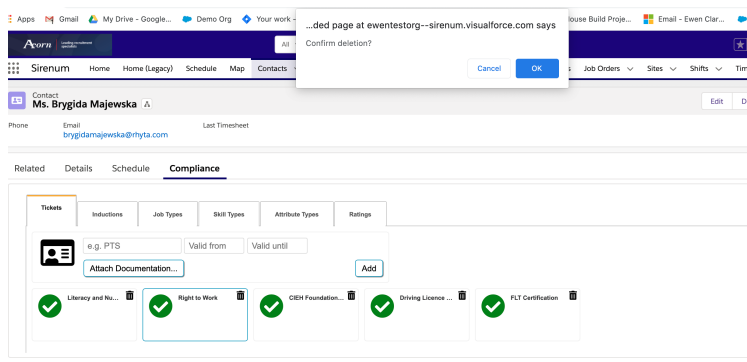
7.4 Compliance

For the purpose of the demo, we need to display two compliance infractions: one of medium severity and one of fatal. It is suggested that you create an induction of medium severity (set to a particular site) and a right to work check of fatal severity (set to the whole account). This enables us to show some of the variety in which compliance, conditions and tickets can be used.
















7.4.1 Removing Tickets

The best way to show this for a demo is to ensure that all your workers have all the required tickets, and then remove two from two of the contacts at the top of the scheduler (not your golden contact).

Access the contact record page from the scheduler by clicking on their name. Once you are at their record page, simply go to the "compliance" tab and click on the dustbin icon to remove the ticket.







































Once you have removed one fatal ticket and one medium ticket, you will see the following icons on shifts assigned to the contacts:

 Brygida Majewska 36 4 Select to send notification <input type="checkbox"/>	 Boston Laundry Operative 06:00 - 15:00 9h	 Boston General Operative 06:00 - 15:00 9h	 Boston General Operative 06:00 - 15:00 9h	 Boston General Operative 06:00 - 15:00 9h
 Corey Parkinson 34.25 3 Select to send notification <input type="checkbox"/>	 Boston Laundry Operative 06:00 - 15:00 9h	 Request Shift 00:00 - 00:00 24h Available	 Request Shift 00:00 - 00:00 24h Available	 Yaxley Food Production Operative 06:00 - 15:00 9h
 Faith Jennings 45.25 5 Select to send notification <input type="checkbox"/>	 Boston General Operative 06:00 - 15:00 9h	 Isleham Bakery Operative 18:00 - 23:30 5.5h	 Isleham Bakery Operative 18:00 - 23:30 5.5h	 Boston General Operative 06:00 - 15:00 9h

The yellow icon is the medium and the red is the fatal.

7.5 Scheduler Review

Once you have completed all the steps above, your scheduler should look like this:

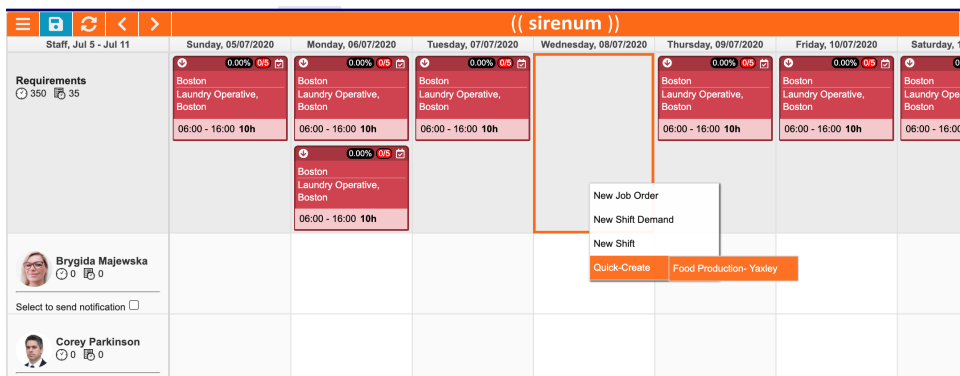
 Brygida Majewska 36 4 Select to send notification <input type="checkbox"/>	 Boston Laundry Operative 06:00 - 15:00 9h	 Boston General Operative 06:00 - 15:00 9h	 Boston General Operative 06:00 - 15:00 9h	 Boston General Operative 06:00 - 15:00 9h		 Dentist 08:30 - 14:00 5.5h Unavailable	
 Corey Parkinson 34.25 3 Select to send notification <input type="checkbox"/>	 Boston Laundry Operative 06:00 - 15:00 9h	 Request Shift 00:00 - 00:00 24h Available	 Request Shift 00:00 - 00:00 24h Available	 Yaxley Food Production Operative 06:00 - 15:00 9h			 Sutton Bridge FLT Counterbalance Driver 05:30 - 21:45 16.25h
 Faith Jennings 45.25 5 Select to send notification <input type="checkbox"/>	 Boston General Operative 06:00 - 15:00 9h	 Isleham Bakery Operative 18:00 - 23:30 5.5h	 Isleham Bakery Operative 18:00 - 23:30 5.5h	 Boston General Operative 06:00 - 15:00 9h	 Unavailable 00:00 - 00:00 24h Unavailable	 Unavailable 00:00 - 00:00 24h Unavailable	 Sutton Bridge FLT Counterbalance Driver 05:30 - 21:45 16.25h
 Gabrysia Sokolowska 36 4 Select to send notification <input type="checkbox"/>	 Boston General Operative 06:00 - 15:00 9h	 Boston General Operative 06:00 - 15:00 9h	 Boston General Operative 06:00 - 15:00 9h			 Unavailable 00:00 - 00:00 24h Unavailable	 Boston General Operative 06:00 - 15:00 9h
 Jade Gregory 40 4 Select to send notification <input type="checkbox"/>	 Boston Laundry Operative 06:00 - 16:00 10h	 Boston Laundry Operative 06:00 - 16:00 10h	 Boston Laundry Operative 06:00 - 16:00 10h	 Boston Laundry Operative 06:00 - 16:00 10h			
 Jake Thomson 33 4 Select to send notification <input type="checkbox"/>	 Boston Laundry Operative, Boston 06:00 - 16:00 10h		 Boston General Operative 06:00 - 15:00 9h		 Boston General Operative 10:00 - 15:00 5h	 Boston General Operative 06:00 - 15:00 9h	

Again, insure that any of your contacts that you wish to show up in open shift do not have a shift assigned on the day of your demo.

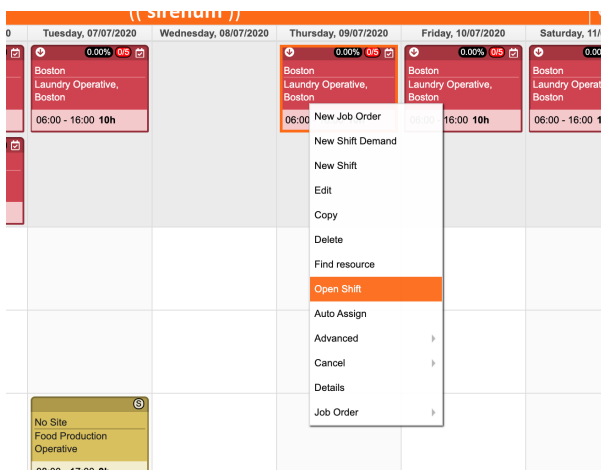
8.0 Open Shift and MySirenum

These two areas of the demo are closely linked, as they show how the matching engine finds the best candidates for the shift and then how it publishes those shifts to the candidates.

Using the requirements bar, right click and select Quick-Create and select the shift template you require.

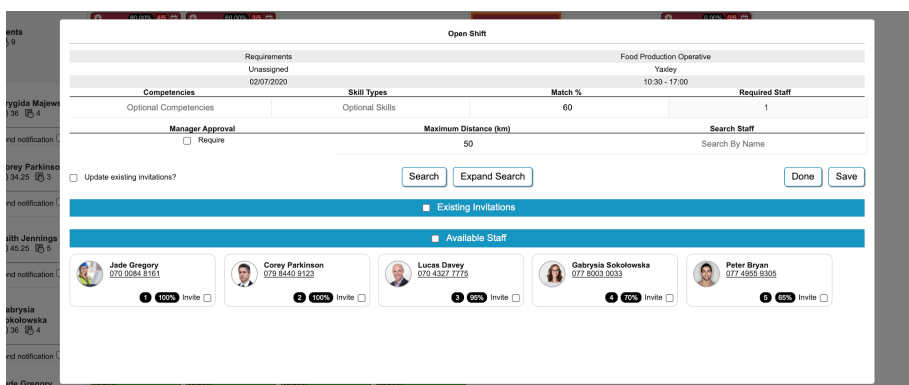


Once selected, we will need to make sure that the shift start time is in the next 2 hours. Right click, edit, and enter in the appropriate time. Once this is done, save the shift. Then, right click on the shift and select Open Shift.



8.1 Matching Percentages

This will bring up the Open Shift window. You can see a list of available staff (candidates) and the percentage match of each to the shift. We will use this screen to explain how tickets, ratings, experience and distance to the location affect the percentage. The default searching criteria starts at 60%: therefore, it is important to have a range of percentages from 100%-60%. The below image is an ideal spread of percentages.



You will want your golden contact to have a perfect 100% match. If they have all the required tickets, live within 1km of the site, have previously worked the same shift, and have a 5 star

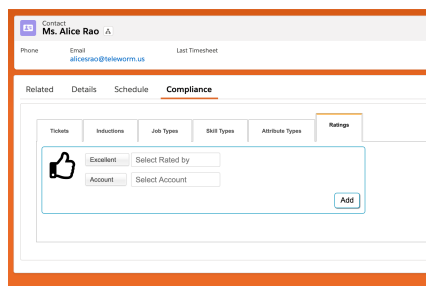
rating, then they will be a good match. See section 8.2 to see how to give ratings. In order to create a variety of percentages for the other candidates, consider removing medium or low severity compliance tickets, giving them 2 star ratings, changing their historic shifts, or moving their home coordinates closer or further from the work site.

If you have too many 100% matching contacts, consider assigning them shifts that clash with that time.

8.2 Ratings

Ratings are another element of Sirenum's compliance module. They enable clients and consultants to rate individual workers for particular jobs or accounts.

To give a contact a rating, simply go to their record page, then to the compliance tab, and click on the ratings sub heading.



You can then select what rating you desire (from excellent to unsuitable) and from what account you want the rating to come from.

8.3 MySirenum

First, ensure that you are logged on to MySirenum on your phone app as the right contact. To demonstrate how to publish the shift to our worker, simply select all the available staff by checking the box next to "available staff" and click save.

28 - Jul 4

Sunday, 28/06/2020 Monday, 29/06/2020 Tuesday, 30/06/2020 Wednesday, 01/07/2020 Thursday, 02/07/2020 Friday, 03/07/2020 Saturday, 04/07/2020

Open Shift

Requirements Food Production Operative
Unassigned Yaxley
02/07/2020 10:30 - 17:00

Competencies	Skill Types	Match %	Required Staff
Optional Competencies	Optional Skills	60	1

Manager Approval ☐ Require Maximum Distance (km) 50 Search Staff Search By Name

☐ Update existing invitations?

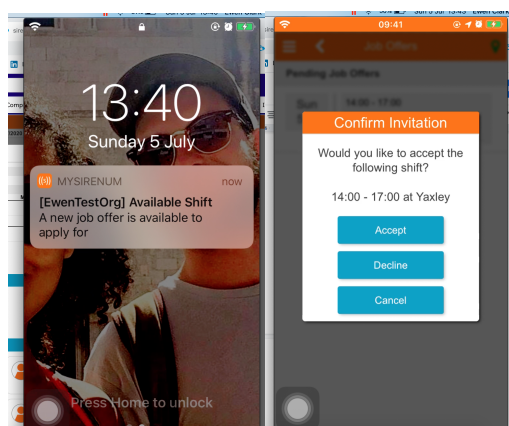
Existing Invitations

Available Staff

 Jade Gregory 070 0084 8181 1 100% Invite <input checked="" type="checkbox"/>	 Corey Parkinson 079 8440 8123 2 100% Invite <input checked="" type="checkbox"/>	 Lucas Davey 070 4327 7775 3 82% Invite <input checked="" type="checkbox"/>	 Gabryśia Sokółowska 077 4063 9032 4 70% Invite <input checked="" type="checkbox"/>	 Peter Bryan 077 4063 9032 5 65% Invite <input checked="" type="checkbox"/>
---	--	---	---	---

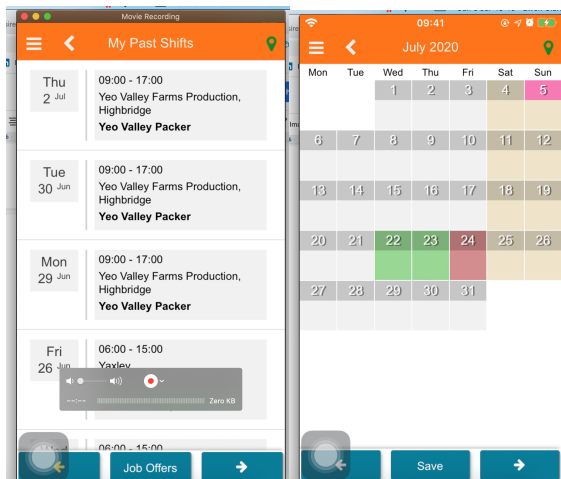
Boston Laundry Operative Boston Laundry Operative Boston Laundry Operative Boston Laundry Operative

This will then send a notification to your phone. You can then access the job offer through MySirenum and accept it.

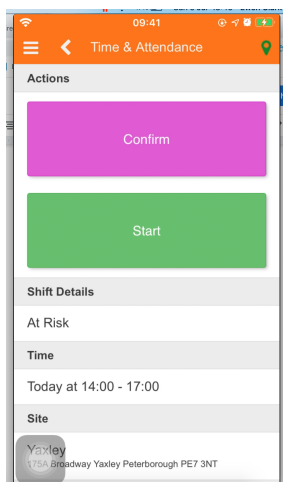


8.3.1 Other MySirenum features

Before returning to the scheduler, we suggest you demonstrate a few of the features of MySirenum. Using the drop down menu, select “shifts” and show that future and past shifts can be shown in the app. Then, if you go back to the menu, you will see “availability”. Use this to show how we can create employee requests in the scheduler.



You can now select “Home” and click “Confirm”. Return to the scheduler.



9.0 Reports and Dashboards

The final part of a demo is briefly showing an example dashboard that the prospective client would find useful.

Any field in a standard Salesforce or custom Sirenum object can be reported upon. Bear in mind that in a 15 minute demo you will not be opening any individual reports, therefore the key thing to remember is that the information looks relevant and the titles are appropriate for the client.

9.1 Reports

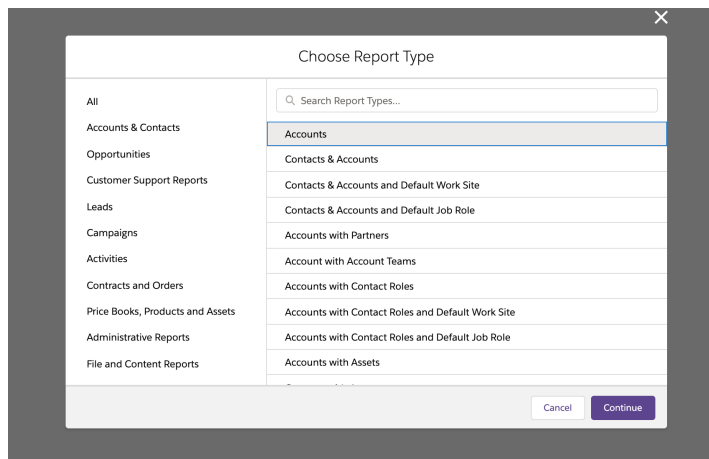
To create a report, go to the reports tab and click “New Report”.

Accounts	Reports	Dashboards	Compliance	Settings	Job Orders	Sites	Shifts
----------	---------	------------	------------	----------	------------	-------	--------

Q Search recent reports...		New Report	New Report (Salesforce)
----------------------------	--	------------	-------------------------

Folder	Created By	Created On	Subsc
Sirenum Dashboard Reports	Ewen Clark	04/05/2020, 11:15	
Sirenum Dashboard Reports	Ewen Clark	04/05/2020, 11:15	
Sirenum Dashboard Reports	Ewen Clark	04/05/2020, 11:15	
Public Reports	Ewen Clark	04/05/2020, 11:15	
Sirenum Quickstart Reports	Ewen Clark	04/05/2020, 11:15	
Private Reports	Ewen Clark	15/06/2020, 16:42	
Private Reports	Ewen Clark	01/07/2020, 9:48	

This will open the below window. There are a wide variety of standard reports to choose from, both Salesforce and Sirenum.



Select the area on which you wish to report and click continue. From the edit report screen, you can then add in columns, and group columns or rows. Remember that only reports will groups can be displayed in a chart. You can also add filters to refine your data.

REPORT		New Shifts Report	
Outline		Filters	
Groups		Lateness Decimal	
Add group...		Contact: Full Name	
Lateness Decimal		Record Count	
Contact: Full Name			
Columns			
Add column...			
Actual End Time			
Actual Start Time			
Shift Name			

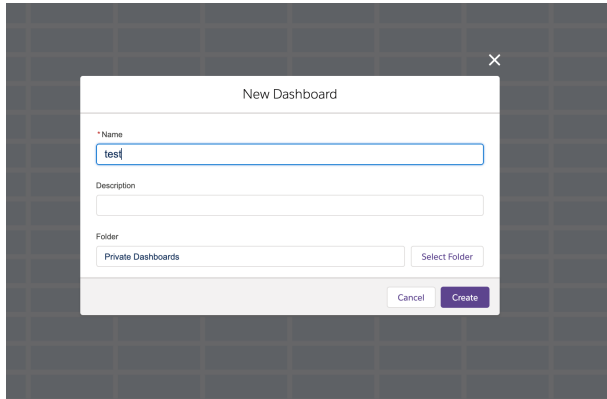
0.22	Brandon Lawrence	1
-	Korstanja Jaworska	1
-	Julitta Pawlak	3
-	Gabrylla Sokolowska	1
-	Ewen Clark	8
-	Dylan Baxter	1
-	Charlotte McDonald	1
-	Brandon Lawrence	2
-	Abby Abbott	1
-	-	1
Total		20

You will need to create as many reports as you wish to display in your dashboard (normally 6). Bear in mind that reports operate in real time- this means that if any object and field within that object that you are reporting on is changed, the report will change as well.

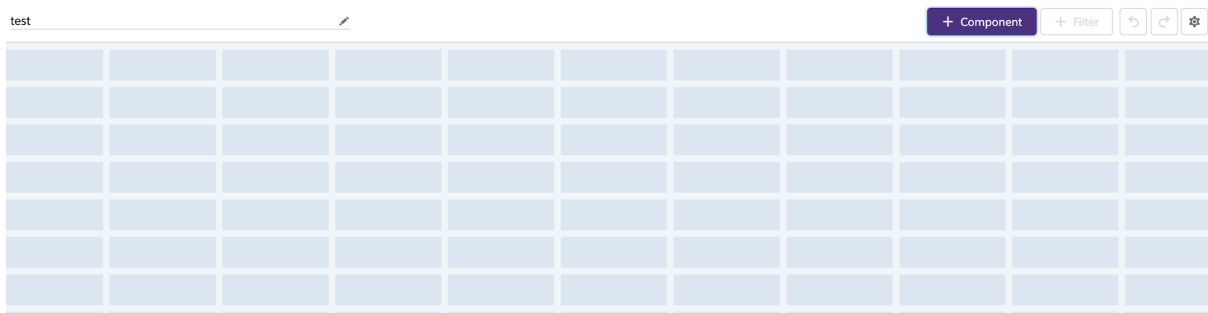
9.2 Dashboards

A dashboard is a collection of reports, displayed in a visual manner. We suggest that you create at least 6 reports in order to fill a dashboard nicely. It is a good idea to have a variety of different reporting metrics in these reports to create a pleasing view that demonstrates the wide utility of reporting within Sirenum.

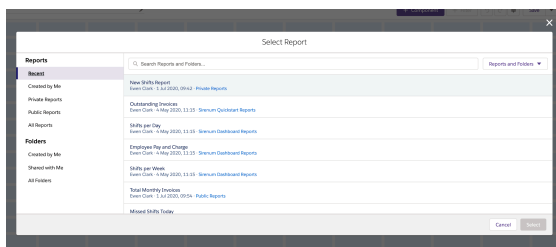
To create a dashboard, click on the dashboard tab and select “New Dashboard”.



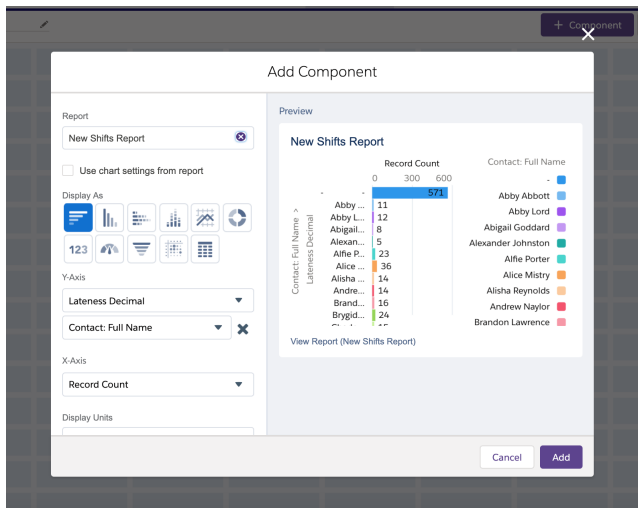
Name the new dashboard something relevant to your prospective client (eg. “South West Operations”) and click new. You will then be brought to the dashboard.



From here, you can add reports by clicking “+ Component”. You can then search through all your custom and the standard reports and add them to the dashboard.



Once the report has been added, you can adjust exactly how you want it displayed, order the records, and generally customise the report.



You can then drag and resize the report on the dashboard to make it accessible and neat.

As an example, see below a few dashboards created for demos.



10. Testing and Final Preparation

Congratulations- you have created an organization, populated it with data, and set up the demo flow. As with any software, testing and preparation are key to ensuring a smooth and easy demo. It is advised that every click you will make during the demo is tested in the hours before. However, remember to then delete any shifts created during the test, otherwise your open shift will not operate the same way.

If there is a particular part of the demo that is not working, please see the FAQ document provided.

Good luck, and enjoy demonstrating some of the capabilities of Sirenum, the most feature-rich and intuitive dynamic workforce management platform on the market!