

easy Log

Customisation case study:

Streamlining the rota, expenses and attendance with easyLog's browser-based scheduling software and mobile apps

When you have 160 people submitting their timesheets on Excel spreadsheets, things can get pretty complicated – especially when the timesheets all have to be checked manually against a rota made with generic Google software. It was this challenging scenario, along with a desire to take advantage of new technology, which led a Kent-based case management company to implement an integrated rota and expenses-management and visit-recording solution from easyLog.

We spoke with the organisation's HR and Payroll team, who told us, "Each support worker would send in an Excel timesheet, so we used to get 160 emails with timesheets in each week

and we never knew if they were 100 per cent accurate. We just can't imagine working like that anymore. The developments in technology were there to help us with the situation, to get rid of all this paper and the manual checking. So as the company grew the management team felt it was time to move on to a streamlined system."

The upgrade to dedicated scheduling and attendance software began in 2018 with an online search for suppliers.

"We had a few companies come in to show us a system and we thought easyLog was the one that would work best for us because they were much more flexible. We knew they would suit us because when we asked 'Could

you do this, and could you do that?', easyLog were the ones that came back and said, 'Yes, that's doable'. The other companies weren't so flexible with helping to tailor the system to our needs."

Getting the details right

The organisation settled on a customised version of easyLog's e-Log+Sb browser-based rota management software, which is hosted on an easyLog-managed cloud platform, and the Location Clock attendance app, so the 160 support workers they manage could clock in and out of a client's own home by scanning a QR code with their smartphone. The organisation also requested a tailored version of the easyLog Staff Portal app, allowing staff to manage their expenses and holiday requests directly from their own phones.

A top priority was changing the rota software to allow the organisation to allocate all working time and holiday to the relevant client rather than simply logging hours worked. A Sage Payroll output could then be generated and imported in the usual way. This was necessary because the



organisation deals with the employment and payroll of support workers on behalf of its clients, who fund the service themselves.

“They put lots of things in for us or made them slightly different. For example, the reports have been amended so that we can run them individually for each client and we can now access work group reports by client instead of job function.

“It’s a constantly evolving thing and we can’t praise easyLog enough – anything we go to them with and question whether it can be done, they are brilliant at coming back and doing whatever they can to help.”

Expenses management made simple

Under the old system, managing employees’ expenses was also time-consuming for the team, with people submitting their invoices via email. But easyLog worked with the organisation to modify the Staff Portal app so expenses could be sent directly from a support worker’s phone, making the whole process quicker, simpler and more reliable.

As well as an option to submit a picture of an invoice taken with the employee’s smartphone, an expenses form was added with fields covering description, reason, value, mileage and the workgroup or client the support worker was assigned to. In addition, staff could use the app to view their shifts and clockings and make a holiday request, which would be sent to the rota software generating an alert.

“We wanted to be able to send expenses straight through to the easyLog system and that has developed over time. Before, people used to just put their expenses on an email with any receipts as attachments. The advantage is that you can manage everything – holiday and expenses and the rota, everything – all within one system.

“Employees have quickly got used to using the smartphone apps with minimal training and, just like us, they appreciate the increased efficiency and reliability of the system.

“The other good thing with the easyLog system is that it does show us that people are where they should be, particularly with our clients that receive ad hoc visits, because it gives us the location as well as the clockings. So we know people are actually with the client for the hours they are claiming for.”

No going back

After two years using the easyLog scheduling, attendance and expenses system, the feedback is that they cannot imagine going back to the old way of doing things.

“It has streamlined the whole system and has definitely saved us a lot of time checking everyone’s timesheets and clockings and so on. It’s also given us the benefit of knowing where support workers are when they clock in or clock out. Looking back now, we can’t imagine having 160 emails coming in every week and physically checking them against the rotas and querying different bits and pieces.

“With the easyLog system we are confident that what the employees are being paid is accurate and that the whole streamlined approach of having everything in one system works really well. We would definitely recommend it.”

