

## Welcome to JoinedUp!

This guide provides an overview of JoinedUp’s Managed Services Provider (MSP) feature. It includes set up instructions as well as step-by-step instructions covering the basic tasks assigned to the Managed Services Provider.

*Please note that these instructions follow standard configuration settings and actions; your system usage may vary depending on account-specific adjustments made to the standard settings.*

You can easily navigate through this guide using the bookmarks or thumbnail settings in your Internet browser. [Check for the instructions](#) provided in the **Appendix** section.

## Getting Started

### ❖ MSP Settings:

#### Feature Switches to turn on:

	Feature switch description	Enable for...		
		MSP	Supplier	Client
<b>Order templates</b>	Enable order templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Shift sharing</b>	Enable new slide out panel layout (turn on for MSP org & Supplier orgs & Client)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Shift sharing</b>	Enable agency notifications when shifts shared from MSP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Finance</b>	Enable Order templates and Agency Summaries for MSPs	<input checked="" type="checkbox"/>		
<b>Finance</b>	Allow MSP users to access supplier shifts, timesheets, workers and so on	<input checked="" type="checkbox"/>		
<b>Importers</b>	Enable MSP Agencies CSV Uploader	<input checked="" type="checkbox"/>		

Setting up your organisations

Each supplier that provides into an MSP organisation is stored in a separate table referred to as msp\_agencies. The MSP and their associated supplier orgs are all set up as regular agency organizations within JoinedUp.

By using the importer, MSP agencies, a system admin user can set up which suppliers will be providing workers to an MSP.

This defines the MSP org. There is no new org type or user type to distinguish between MSP and supplier.

	A	B	C
1	Msp ID	Supplier ID	
2			
3			

**Format:**

- MSP ID (Org ID of the MSP)
- Supplier ID (Org ID of the supplier to link to the MSP)

The importer can be switched on as a feature switch.

Feature	enable msp	Enabled?	Enable date
<b>Importers</b>			
Enable MSP Agencies CSV uploader		<input checked="" type="checkbox"/>	
<a href="#">Save changes</a>			

## ◆ Order templates

Order templates are designed specifically for the use case of MSPs working with their supply chain. Unlike shift templates, order templates are not owned by one specific organisation, and therefore it's possible to set them up to manage which agencies to work with and how shifts are shared between agencies within the supply chain.

How to create an order template:

- Navigate to **Plan > Shift templates > Create a shift template**.
- Select **Order template** in the **Type of template** section.
- An MSP creates an order template to be able to share shifts to suppliers that are linked to the order template.
- The MSP org can also create 'regular' shift templates to supply workers directly to a client.

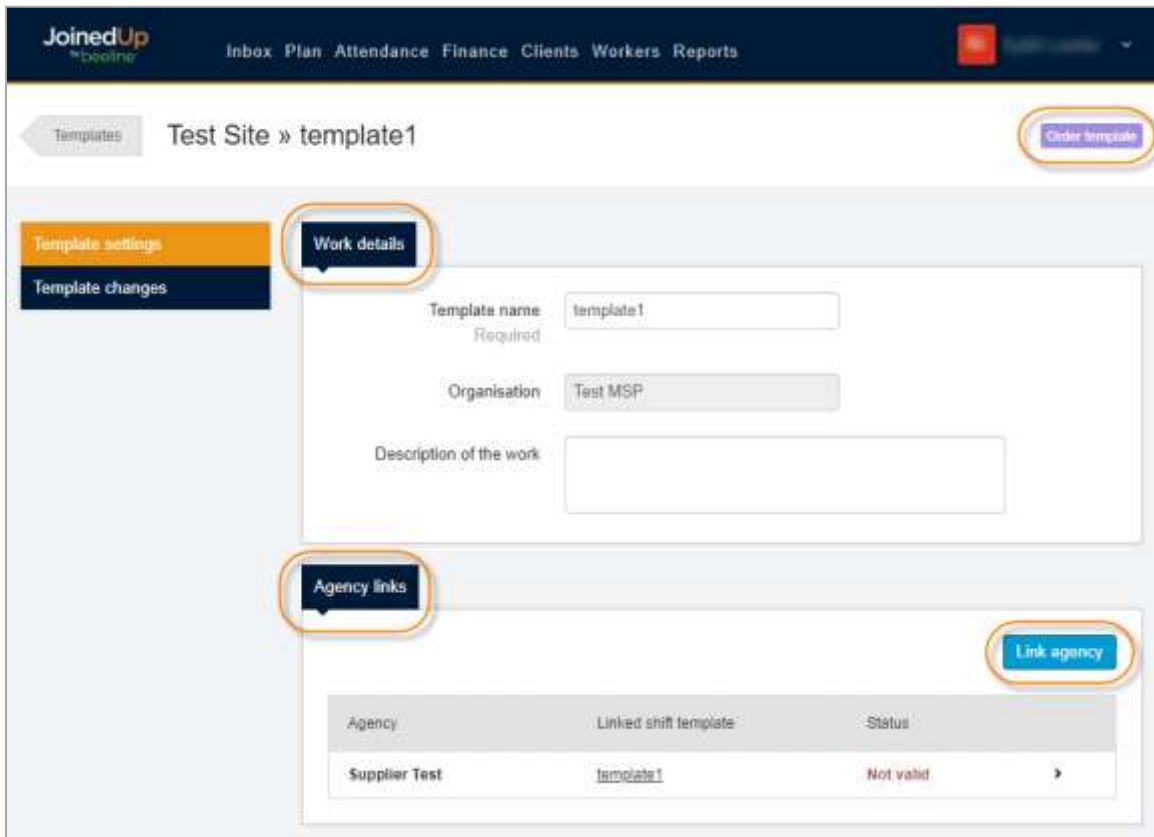
How to distinguish an order template from a shift template:

Order templates are identified by their tag to indicate they are an order template.

The limits of an order template vs. a shift template:

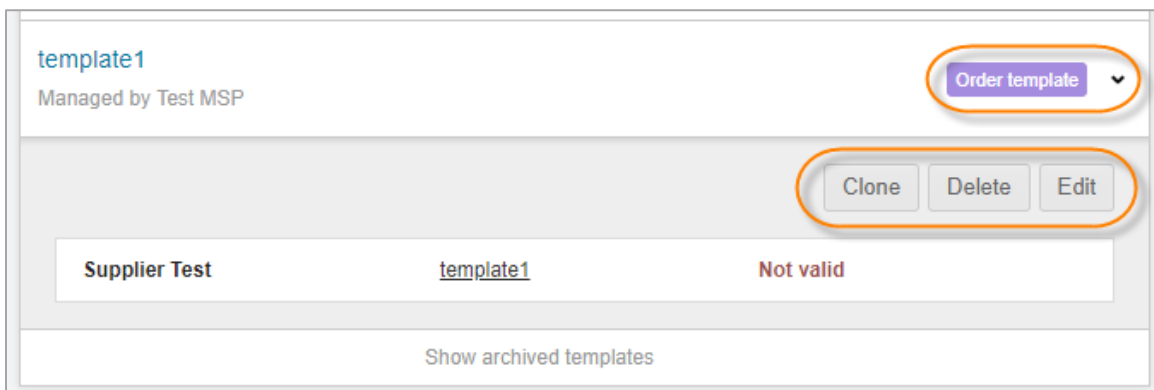
An order template only stores basic information:

- Template Settings (Work details and Agency links)
- Template Changes



Managing order templates:

As with shift templates, order templates can be cloned, archived, edited, or deleted.

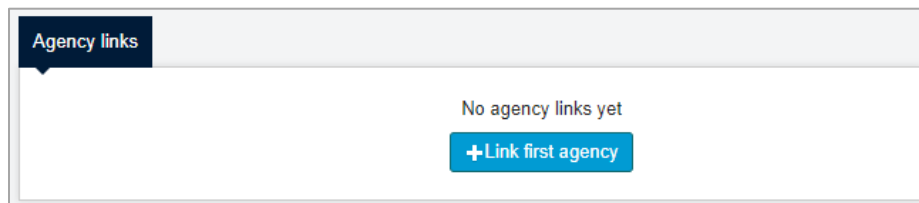


Linking suppliers to order templates:

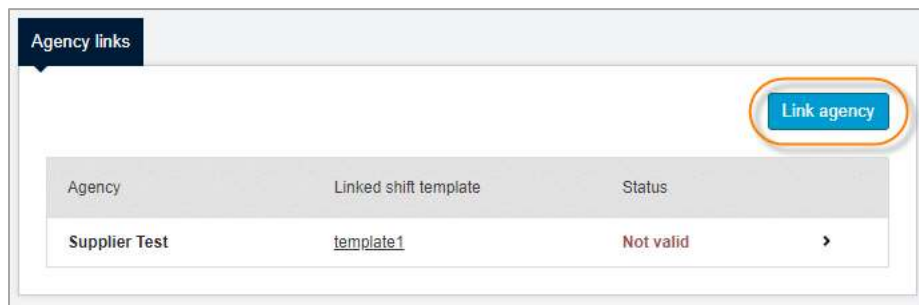
Under **Template settings** for order templates there is an **Agency links** section. This is where Agencies (suppliers) are linked to the order template.

Agency links define which suppliers the MSP can share shifts to when a shift is created using an order template.

If no agency has been linked to an order template, a '+ Link first agency' button displays in this section.



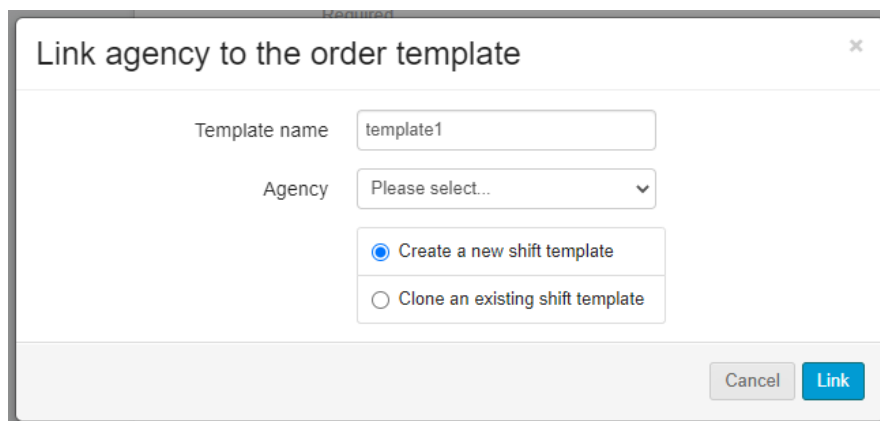
If agencies have already been linked to the order template, the suppliers display in a list. Click the edit button to navigate to the templates settings to add more agencies. The button will appear on the upper right-hand corner above the Agency list.



Once the option to link an agency is selected, a new modal window opens with a drop-down selection list.

Use this Agency drop-down list to select which agencies to link to the order template. The selection list is generated by the agency IDs added to the msp\_agencies ID. (See the "Setting up your organisations" section above.)

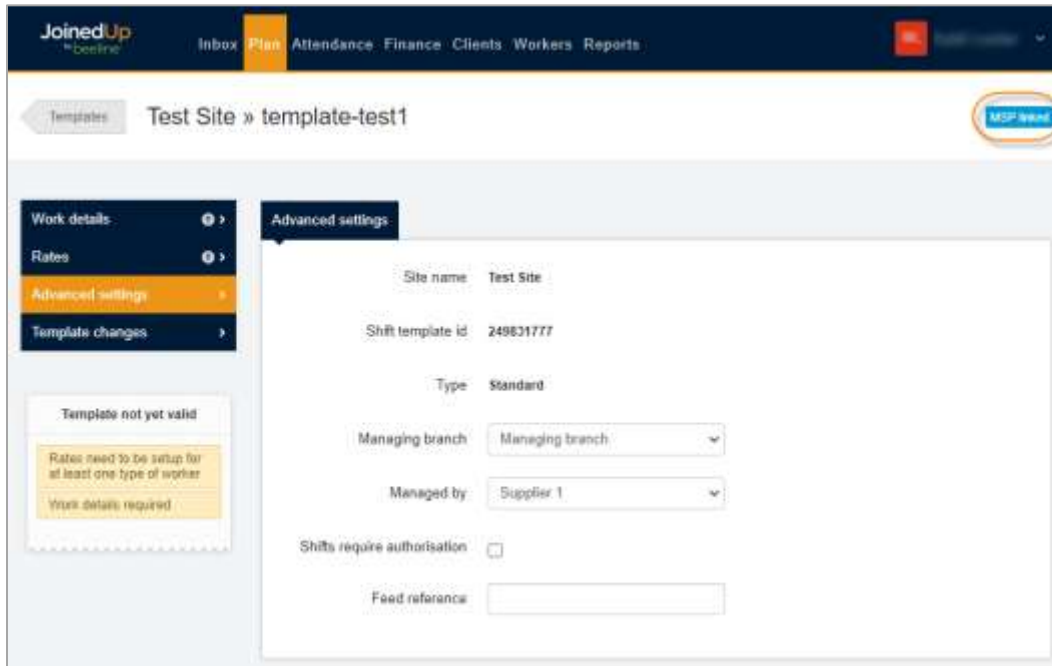
If no agencies are linked, the full list is visible. If there are any agencies already linked, the list only displays the remaining available agencies as selection options.



A shift template is created for the selected supplier when linking an agency to an order template. These are referred to as 'MSP linked' shift templates; however, they incorporate the same details as a regular shift template.

Select whether to create a new shift template or clone from an existing shift template when linking an agency to the order template. Cloning follows the same format as the current workflow for Agency users.

Once you click **Link** ( [Link](#) ), the MSP linked template is created and the template details screen displays.



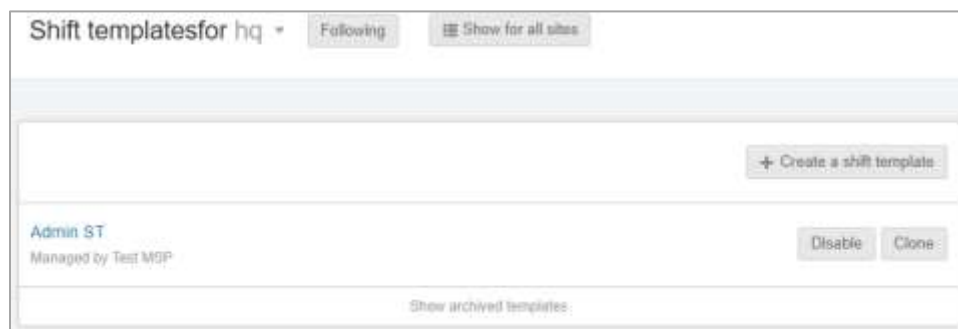
The MSP is then able to edit and manage the agency's MSP linked shift template, i.e., work details, finance settings, rates settings, shift planning settings, and time & attendance settings.

These shift templates are tagged as 'MSP linked' to indicate they are linked to an order template.

'MSP linked' shift templates are read-only to the Agency user—only the MSP can create and edit these templates.

**Managing order templates and MSP linked shift templates:**

Once an order template and associated MSP linked shift templates are created, you can delete, disable and re-enable as needed.



## ◆ Shift Sharing

What distinguishes order templates from shift templates is that shifts associated to an order template can be distributed to more than one supplying agency.

Create and distribute shifts to suppliers (Post Shifts screen)

In the **Post Shifts** screen, shifts are created with an order template—either by the end-hirer or by the MSP.

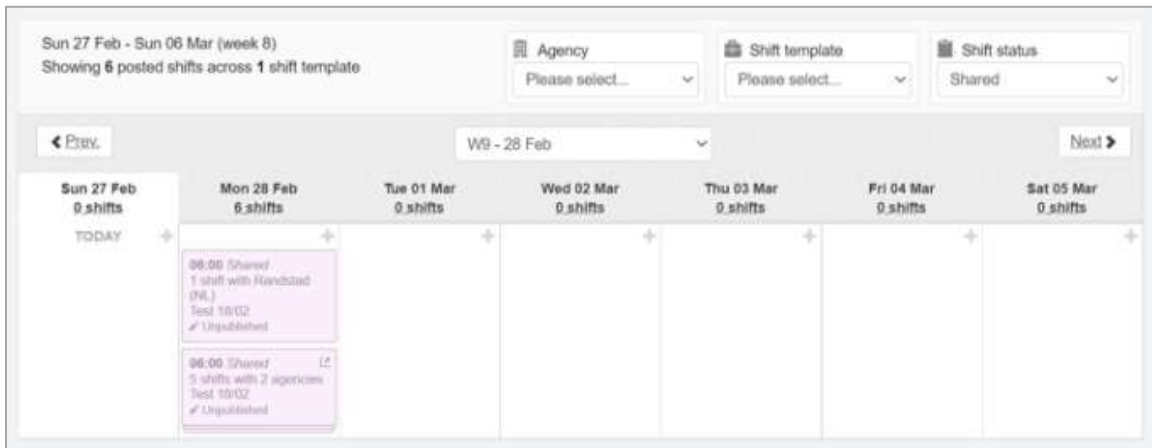
Click the relevant shift tiles and the new slide out panel displays. Notice that it includes a **Shift sharing mode** section to designate whether to share with a single agency or with multiple agencies.

- **Share with single agency** – share shifts exclusively with a specified agency.
- **Share with multiple agencies** – share shifts competitively across multiple agencies.

The image displays two side-by-side screenshots of the 'Share shifts' interface. Both screenshots show a shift for 'Mon 28 Feb at 06:00 Test 18/02' with '9 unallocated shifts'. The left screenshot shows the 'Share with a single agency' option selected. Under 'Share:', there are two entries: '3 shifts Carriere (NL)' and '1 shifts Randstad (NL)'. A blue button labeled 'Share shift(s)' is visible, with the text '5 shifts left to share' next to it. The right screenshot shows the 'Share with multiple agencies' option selected. Under 'Selection:', it shows '5 shifts out of 9'. Under 'Share with: All | None', there are two checked checkboxes: 'Carriere (NL)' and 'Randstad (NL)'. A blue button labeled 'Share shift(s)' is also present at the bottom.

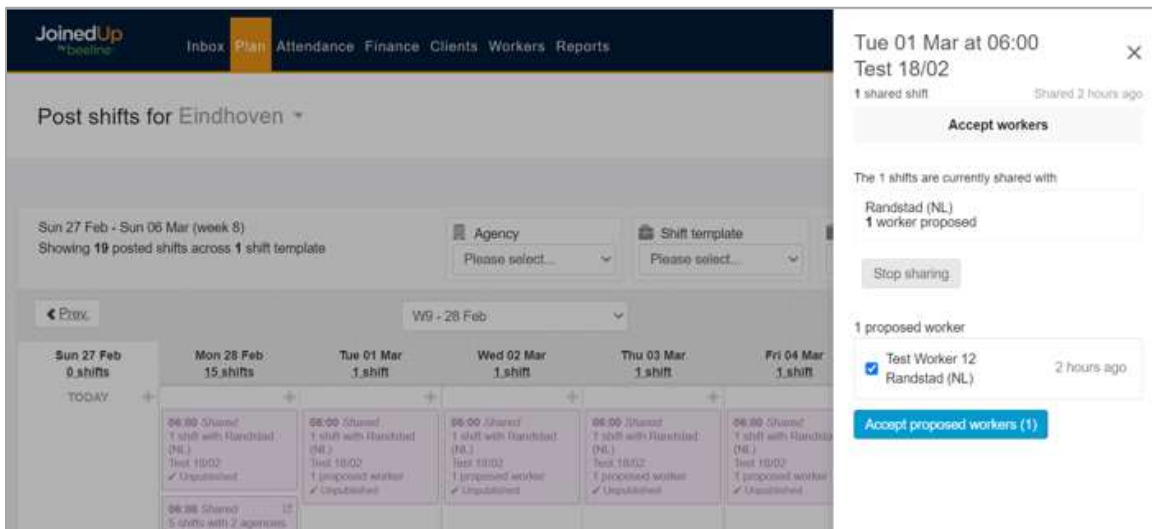
Click **Share shift(s)** ( [Share shift\(s\)](#) ) to distribute shifts out to the supplier(s) based on the 'share' selection made. The list of 'selectable' suppliers depends on which suppliers were linked to the order template.

The status in the Post Shifts tile updates to show the shift has been shared and with the number of suppliers.



Click any tile to view the status of the shared shifts options including:

- Stop sharing shifts.
- View and Accept proposed workers.



Suppliers receive and propose workers – Shift allocation (On site) screen

Shifts shared with suppliers display on the On site allocation planning screens.

Workers need to be linked to MSP linked templates to add them to a Plan and propose them for shared shifts slots.

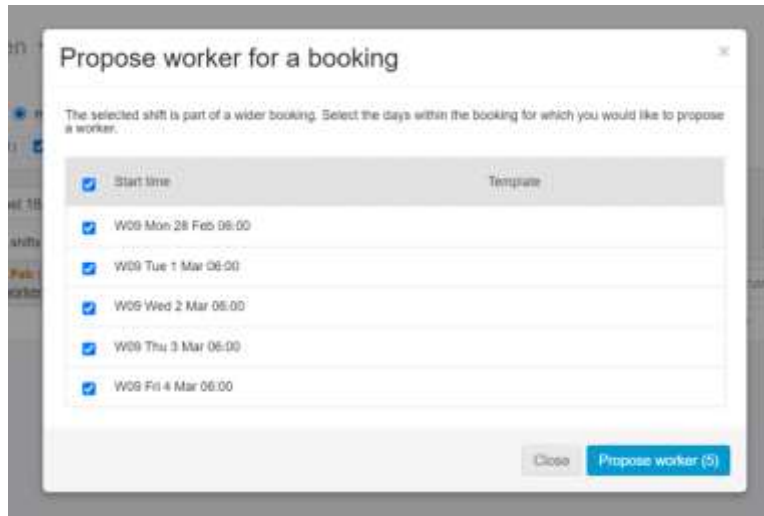
Shifts appear in the shift hopper; select the drop-down against a worker's name. The option to 'propose' displays.

Shifts are split into two categories:

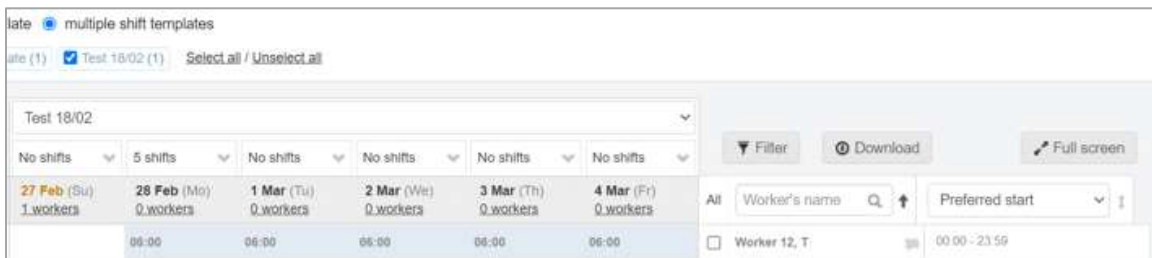
- **Shifts shared only with you** – identifies shifts where only a single agency receives the shift.
- **Shifts shared with you and to others** – identifies shifts that have been shared with multiple agencies



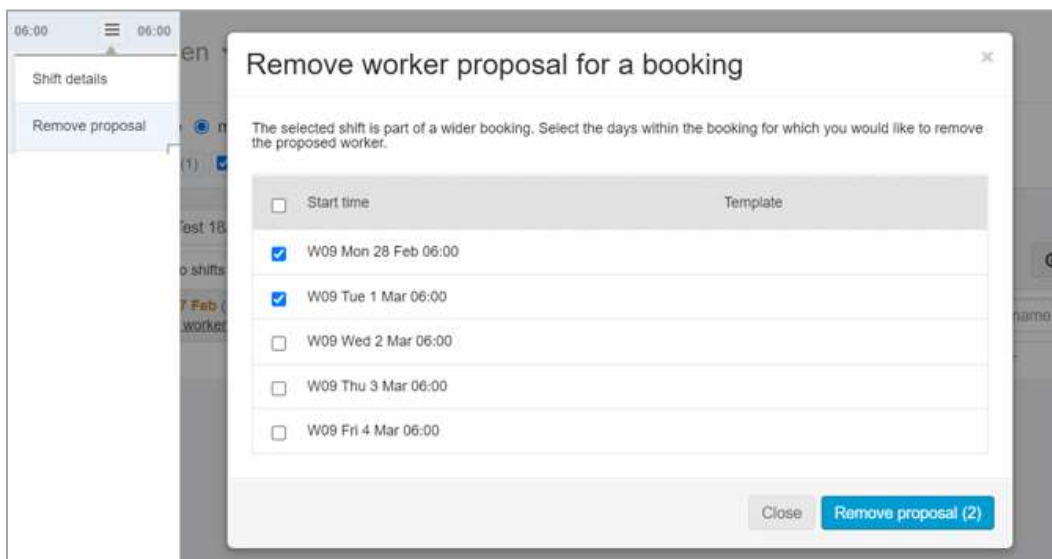
When proposing workers, if the shift is part of a booking, e.g., 06:00 Mon-Fri, the booking displays as an itemized list of shifts and suppliers can propose a worker for the entire booking, or a select number of shifts.



Once 'proposed', the shifts display with a blue background and the workers need to be 'accepted' to be fully booked against the shift.



Use the shift's drop-down selection menu to remove the worker from a shift. If the worker is booked on multiple shifts within a booking, you can remove the worker from other shifts as well.



Once the proposed shift is accepted, the worker is allocated to the shift. Status can be published or unpublished depending on the site settings.

## ◆ Impact on other areas of the JoinedUp workflow

### Time & Attendance

- ◆ T&A is entered by the worker, supplier, or client, using standard JoinedUp time and attendance options.
- ◆ **Attendance** – the calendar layout and filters provide at-a-glance insights into a variety of attendance related statuses, with special emphasis on “late starting” and “long running” shifts.
- ◆ **Batch edit start/stop times** – simplifies the workday by providing the ability to adjust shift “start” and “stop” times in batch mode.

### Finance

- ◆ **Shifts to be approved** – completed shifts (i.e., timesheets), submitted and waiting for the Client to approve for payment.
- ◆ **Queried shifts** – shifts that have an open “raise a query” issue. Once the query is resolved, the shift needs to be resubmitted before the Client can approve for payment.
- ◆ **Approved shifts** – shifts approved by the Client and ready for financial report processing. The **Statements** section includes a download link to export financials.
- ◆ **Weekly guarantees** – identifies which submitted shifts qualify under this specialized payment category.
- ◆ **Unsubmitted shifts** – shifts that are complete but have yet to be submitted for Client approval.
- ◆ **Statements** – create collated timesheet reports with filters by site, shift template, and work week.
- ◆ **Timesheets** – all timesheets whether they are complete (i.e., ready to be submitted) or incomplete (missing information or have an unresolved query).
- ◆ **Adjustments** – shifts that had adjustments made to them, includes links to drill-down to view the specific details.
- ◆ **Site locks** – shifts that have been submitted and approved are locked to block any additional changes so that they can be consolidated into a financials report for extract.

### Reporting

- ◆ **Reports suite** – access to JoinedUp’s suite of standard reports. Includes filters to generate new reports and a download link to export results in .csv format.
- ◆ **Custom reports** – access to custom reports created for MSP use.
- ◆ **Site stats** - provides an at-a-glance overview of key Attendance statistics and Finance timesheet statuses. Click any displayed stat number to navigate directly to the associated details screen.

## Appendix

### Self-Directed Training Modules



Self-directed training modules are available for both Client and Agency users. These modules give you insights into the features and tasks assigned to these key user roles. These modules are designed to be completed at the user’s own pace and as their time schedule permits.

Click here to access.

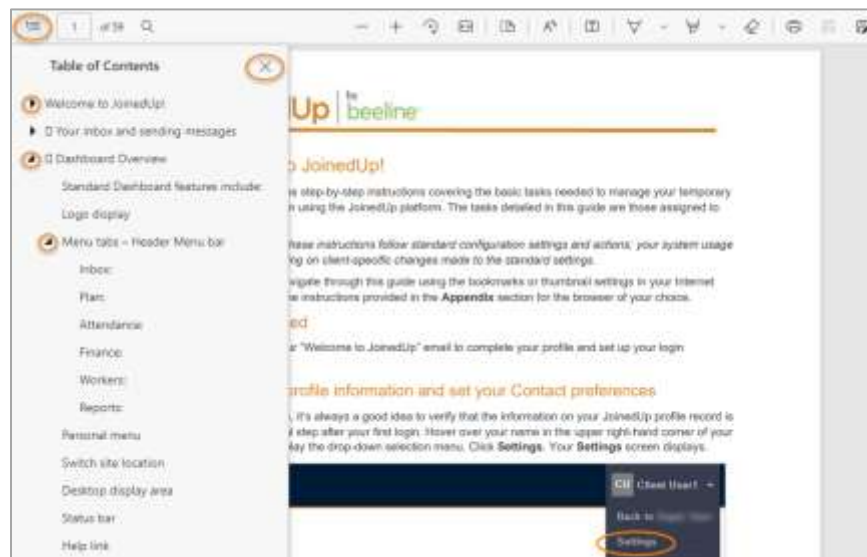
- ◆ [Client user](#)
- ◆ [Agency user](#)

### How to use PDF bookmarks to navigate through this guide

The display and use of bookmarks depends on the internet browser that you use.

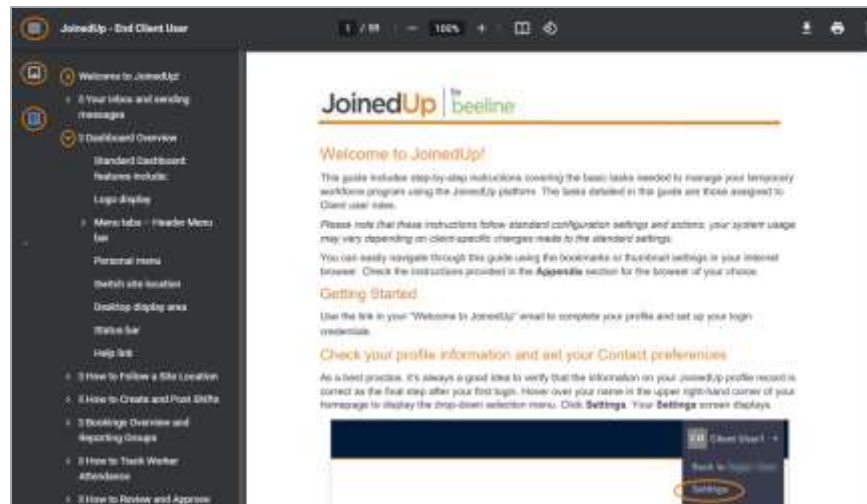
Microsoft Edge:

Click the **Table of Contents** icon (☰) in the pdf header bar and a slide-out panel opens to display all the document headings as a Table of Contents. Click any header to navigate directly to that section. Use the arrows next to the headers to expand (or hide) subheadings. Click the X in the upper right of the panel to close the Table of Contents.



## Chrome:

Click the **Menu** icon (☰) in the pdf header bar and a slide-out panel opens to display a **Table of Contents**. Notice that there are two versions, Document outline (☰) and Thumbnails (🖼️). Click the respective icon to view the version of your choice. Use the arrows (▶) next to the outline headers to expand, or hide, sub-sections. Click any header text or thumbnail to navigate directly to that section. Click the Menu icon to close the panel.



## Mozilla Firefox:

Click the **Toggle sidebar** icon (☰) in the pdf header bar and a panel opens on the left to display a Table of Contents. Notice that there are two versions, Document outline (☰) and Thumbnails (🖼️). Click the respective icon to view the version of your choice. Use the arrows (▶) next to the outline headers to expand, or hide, sub-sections. Double-click the Document outline icon to expand all sections. Click any header text or thumbnail to navigate directly to that section. Click the Toggle icon to close the panel.

### Thumbnail view:

