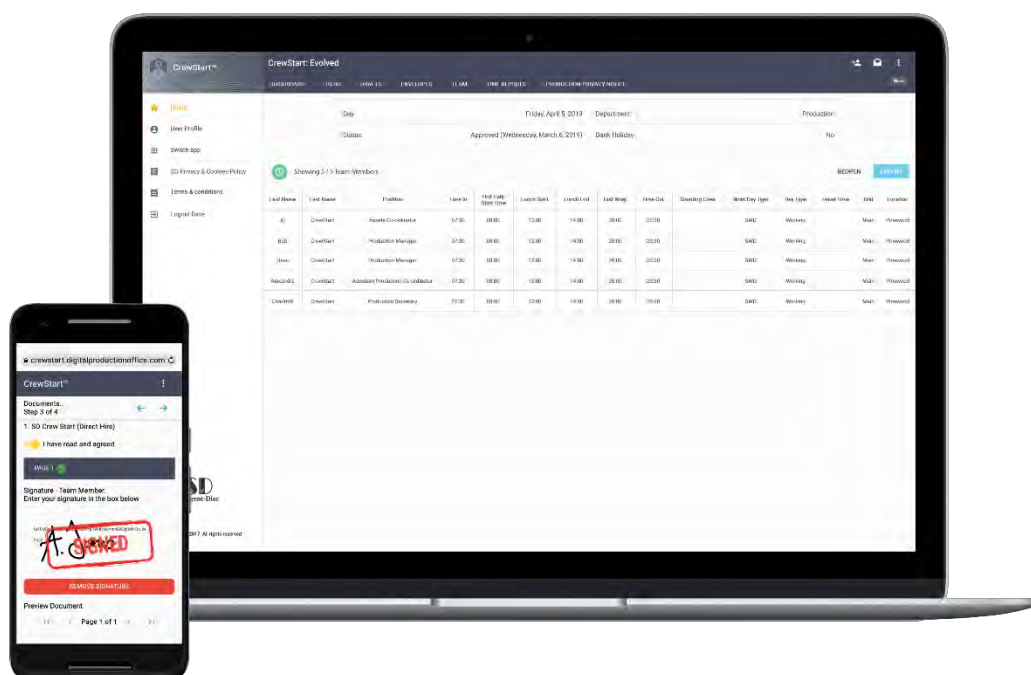


CrewStart™

User Manual



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Support advisors are available 8am-8pm Monday-Friday

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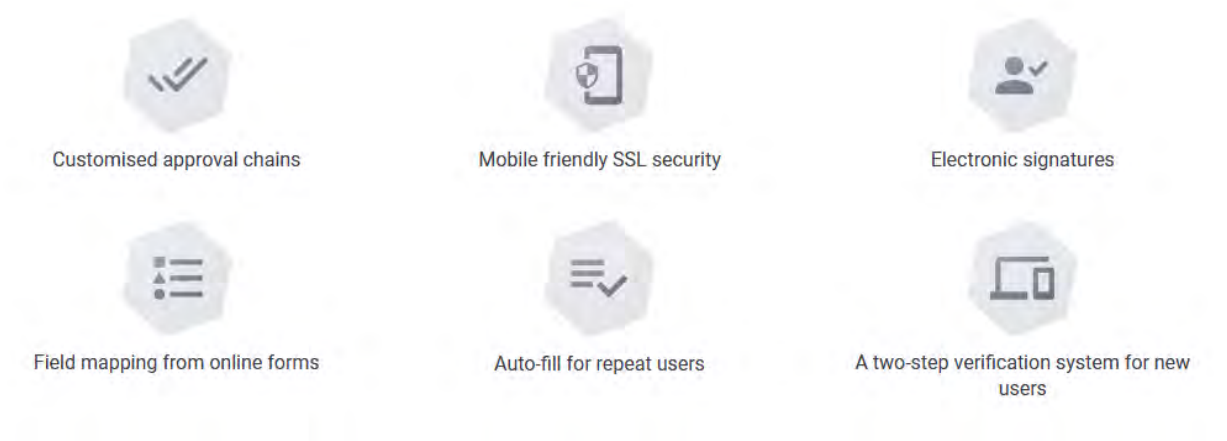
What is CrewStart?

CrewStart is designed to streamline the gathering and approval of contractual information for the production cast and crew by allowing start forms and contracts to be completed & signed electronically.

In addition, the Timesheet & Time Report features enable the production office to manage the time and attendance of crew. This information can then be exported to Sargent-Disc's Payroll system, enabling faster and more efficient payroll processing.

Secure electronic signatures eliminate the need for the physical circulation of documents, saving both time and paper. Once the forms have been completed by the crew member, tailored approval chains guarantee that the information is reviewed and approved by relevant department heads, managers, accountants and producers.

The contractual information gathered within CrewStart is held securely and can be reviewed on the go, anytime and anywhere.



What is an Envelope in CrewStart?

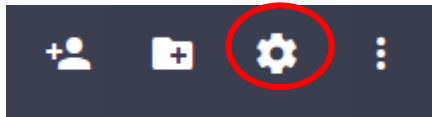
An envelope in CrewStart is a package containing electronic documents which may include a Start Form, a Timesheet or other documents such as the crew member's contract, allowance forms or policies to be acknowledged.

Sargent-Disc can configure your envelopes and the documents you require in those envelopes based on the production's requirements. All of the documents you require on paper can be implemented electronically within CrewStart.

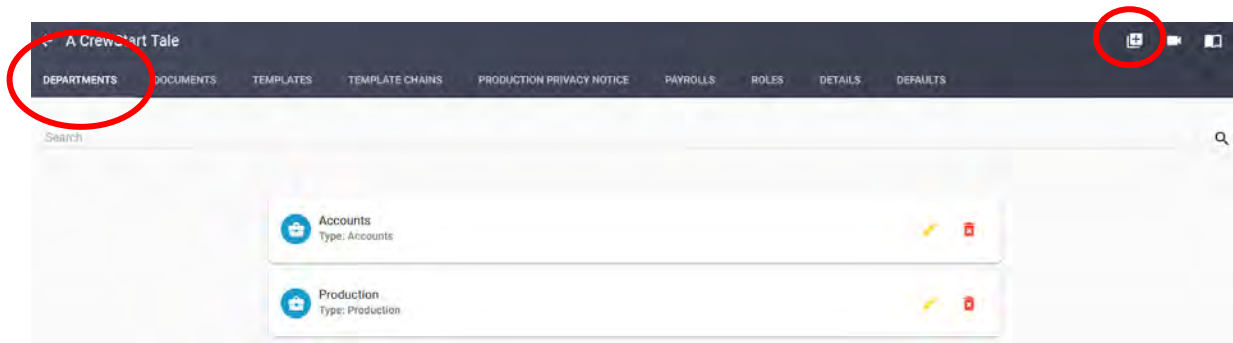
How to Add Departments to Your Project

Before you can invite team members to join CrewStart, you will need to ensure you have added the relevant Departments to your project.

Log in to CrewStart, click the Project Admin cog in the top right-hand corner



Click on the Departments tab > click the “Add Department” icon in the top right-hand corner



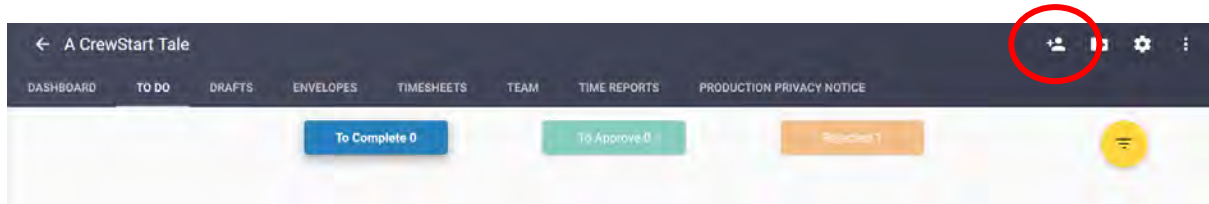
Populate the Department Name and select the Department Type

Your Department has been added

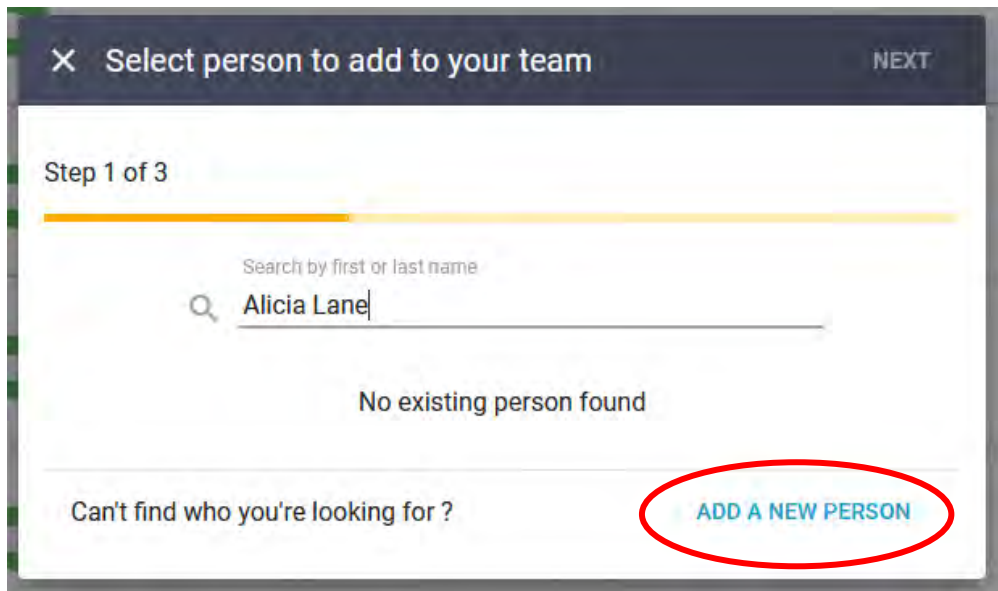


Inviting a Team Member to Join CrewStart

Log in to CrewStart, select the relevant project and click the **Invite Team Member** icon in the top right-hand corner (below)



Next search by team member name to see if they already have an existing account on CrewStart. If the team member does not have an existing account (or if you aren't sure) click **Add A New Person**.



Complete the mandatory fields: Title, First Name, Last Name, Personal Email Address (or project email), Mobile number, Department and Job Title.

N.B. If the Job Title is not listed in the dropdown menu, click **Add** at the bottom of the dropdown menu.

N.B. 'Title' is no longer required when inviting a Team Member, creating a user, creating or updating an Agent, and updating User Profile.

If the department required is not available, please refer to p4 of this guide.

Where the team member has an agent, please refer to p41 of this guide.

RESOURCES TEAM TIME REPORTS PRODUCTION IMPACT NOTICE

✕ Fill team member details PREVIOUS NEXT

Step 2 of 3

Title Title

First Name Enter a value
First name is required

Last Name Enter a value
Last name is required

Personal Email address Enter a value
Email is required

Project Email address Enter a mail address

Country code Country code *

Personal Mobile Enter a personal mobile
Mobile is required

Employee Number Employee number

Reference Enter a value

Department Department *
Department is required

Agent Agent

Click **Next** and then **Add Team Member**.

You will then be asked if you would like to send the team member an Envelope and/or assign a security role. You have the option to send the envelope along with their invitation, or you can send the envelope at a later date. Likewise, you can assign a security role at invitation stage, or assign it at a later date.

The new team member will now receive an invitation by email where they need to follow the steps to create a personal login for the project.



Video Tutorial

Accepting an Invitation to Join CrewStart

Once you receive your CrewStart invitation by email, you will need to follow the link in the email to set up your account. You will be prompted to request a passcode which will be texted to your mobile phone.



Once you have read and acknowledged the privacy policy, in the next screen you will be given two options: if you already have a Sargent-Disc username & password (for example to view Payslips or for a previous project) then click **Login**.

N.B. if you have forgotten your username or password, click **Forgot Password** or **Forgot User Name**.

If you do not already have a Sargent-Disc username & password, click **Register** to set your new credentials.



Video Tutorial

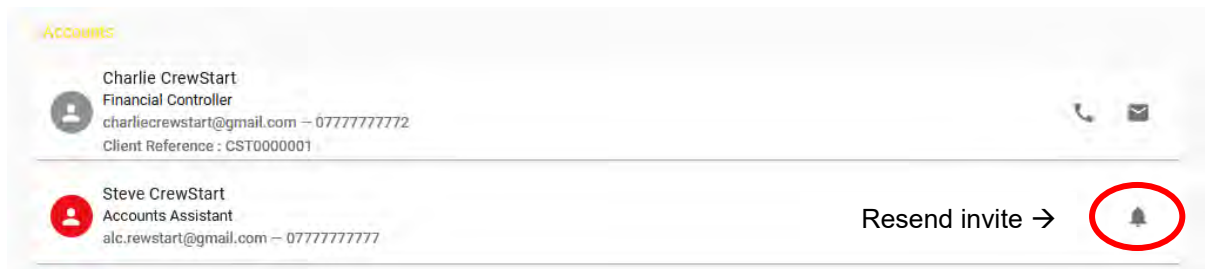
How to Resend an Invitation to a Team Member

Where an invitation has expired or you would like to send it again as a reminder, it can be resent to the team member.

Go to the **Team** tab within the CrewStart application where you will see the team member list broken down by department. You will see a coloured icon next to each person:

- **Green** indicates the team member has accepted the invitation
- **Orange** indicates that the invitation is pending (yet to be accepted)
- **Red** indicates that the invitation has expired
- **Grey** indicates that the team member's access has been disabled

Team members with pending and invitations can be resent an invitation by clicking on the bell icon which appears next to their name.



How to Assign Security Roles

As a Project Admin, you are responsible for assigning Project and Departmental security roles to your team members. You also have the ability to extend or handover project admin duties to other members i.e. make other members of your team Project Admins in addition to yourself.

Project Admin: has overall visibility of the project on CrewStart. Only a project admin can see the Administration tab within CrewStart and assign security roles to others.

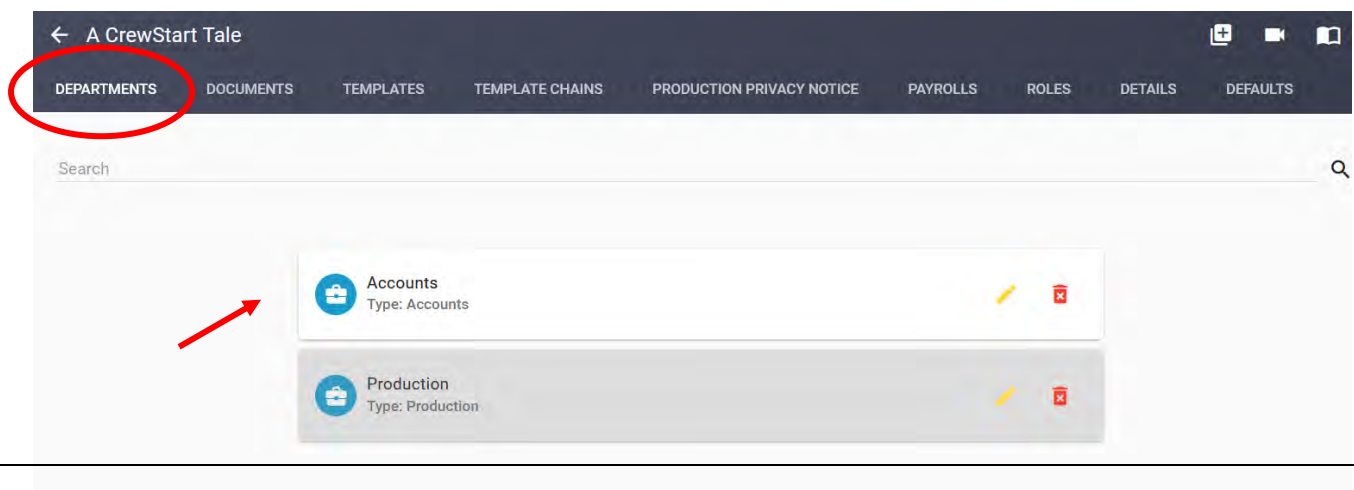
Project roles: grant overall visibility of the project on CrewStart across all departments i.e. the individual will be able to view all team members and envelopes across the project. The individual will also have the ability to invite team members to any department.

Departmental roles: grant visibility of their department only, these roles have more restrictions than project roles i.e. the individual can only see envelopes and team members in the department(s) they are assigned to. They will also only be able to invite team members to their department

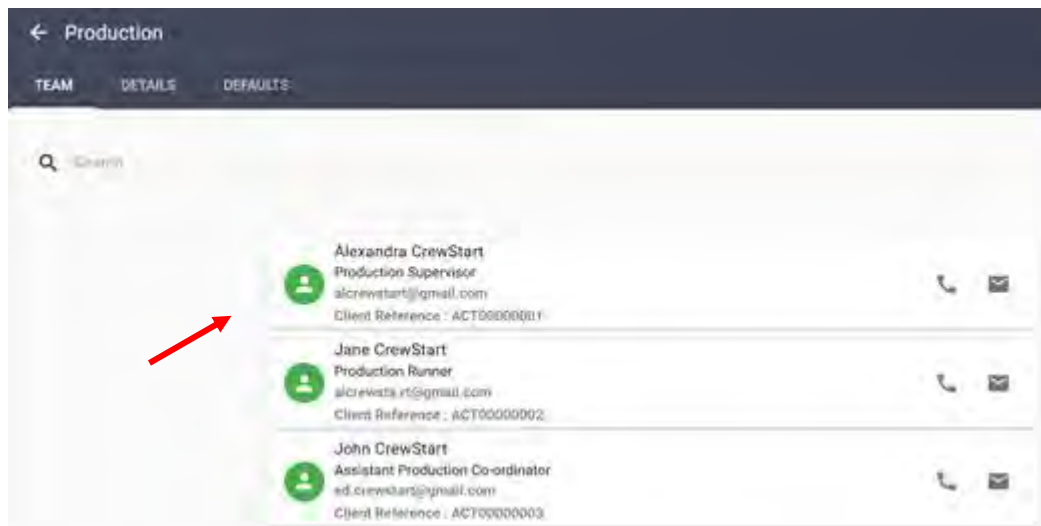
To assign a team member a security role, log into CrewStart and select your Project. Click the **Project admin** cog icon in the top right-hand corner



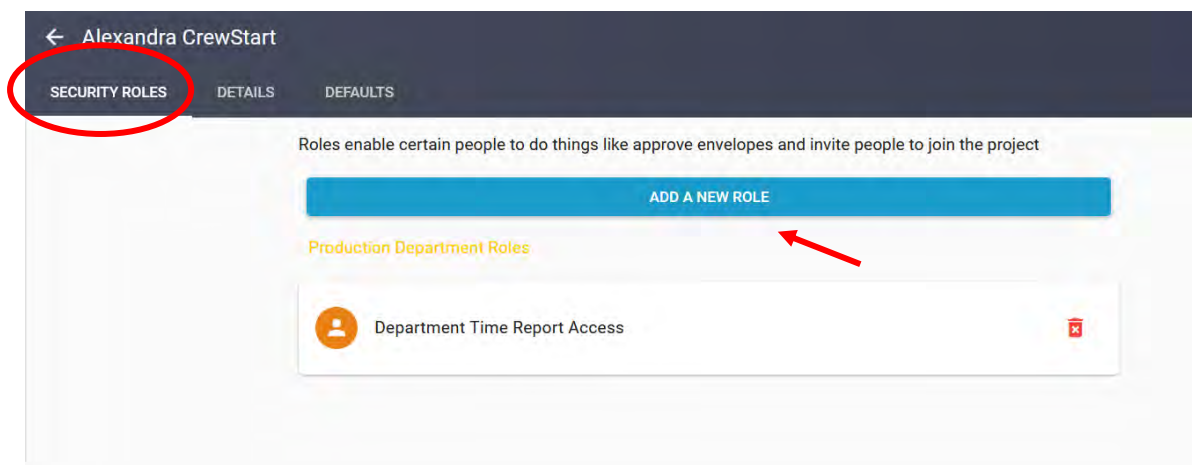
This takes you to the **Department** tab. Click on the relevant department.



Click on the team member who you want to assign a security role to:

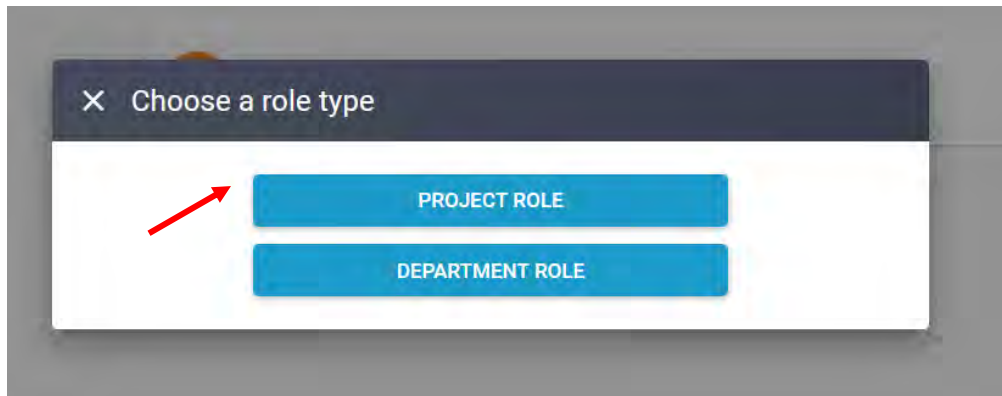


Click the Security role tab in the top left. You will then be able to view existing roles (if any) that are applied to the team member. To add an additional security role, click **Add A New Role**

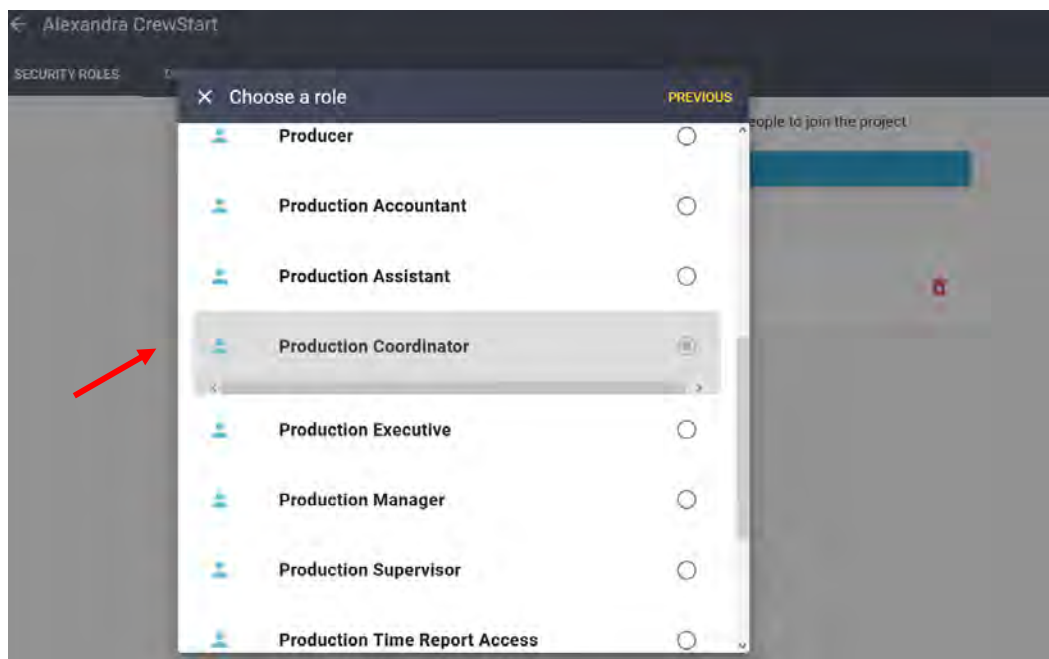


Choose a role type: **Project Role** or **Departmental Role**.

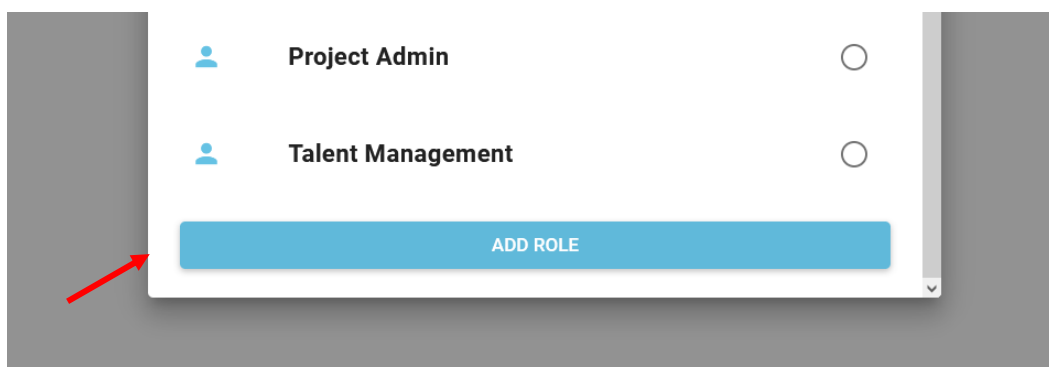
N.B. Where assigning a Project Admin role, this sits within Project Role



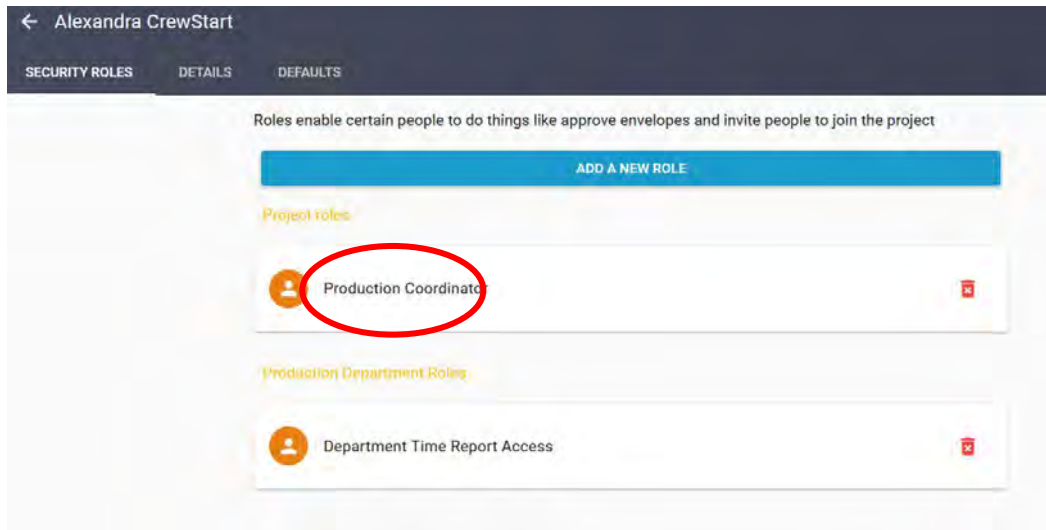
Choose a role:



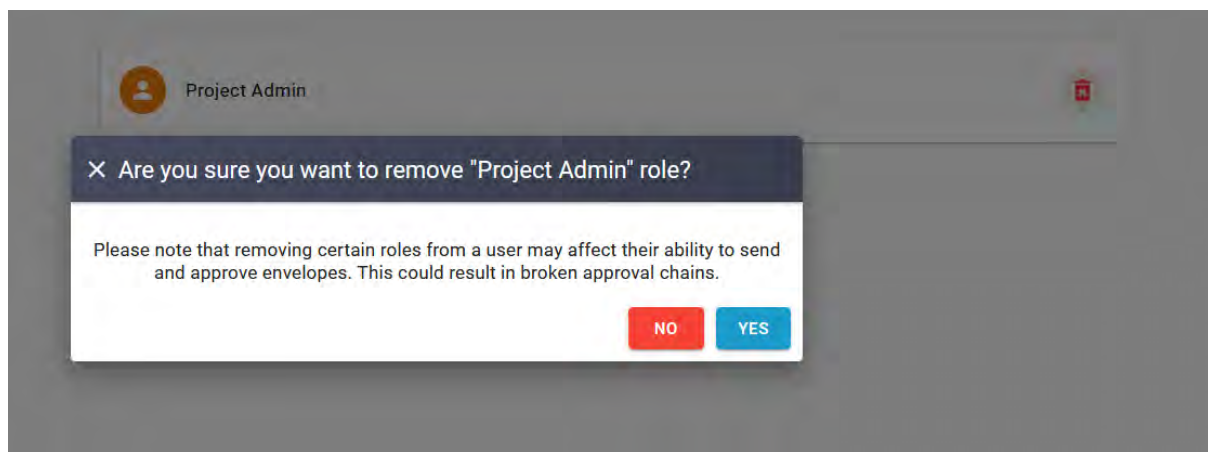
Scroll to the bottom and click **Add Role:**



You will then see the role has been added to the team member's profile:



To delete a security role, click on the delete icon on the role record and confirm:



Approval Chains

As part of your CrewStart set up, Sargent-Disc will configure approval chains for each template type, example below:

The screenshot shows a web interface for configuring approval chains. At the top, there is a dark header bar with a back arrow and the text 'PACT/BECTU TV Timesheet'. Below this is a navigation menu with several tabs: 'APPROVAL CHAIN', 'TEMPLATE DEFAULTS', 'DOCUMENTS', 'PAYROLL', 'ENVELOPE CONFIGURATION', 'DETAILS', and 'DEPARTMENTS'. The 'APPROVAL CHAIN' tab is selected. The main content area displays a vertical list of four approval levels, each with a yellow label 'Level 1' through 'Level 4'. Each level is represented by a white box containing a blue circular icon with a person silhouette and a text label. Level 1 is 'Team Member'. Level 2 is 'Head of Department'. Level 3 is 'Unit Production Manager' with 'Production Manager' written below it. Level 4 is 'Production Accountant'. To the right of each box, there are small icons for editing (a pencil) and deleting (a red trash can). To the right of each level's box, there is a small equals sign icon.

Once you are ready to use your Project, the project admin will need to ensure to assign security roles as per the approval chains requested. **List of security roles available**

Project Roles

- Confidential Data Viewer
- Executive
- Financial Controller
- Financial Executive
- Head of Department
- Line Producer
- Payroll Accountant
- Payroll Assistant
- Producer
- Production Accountant
- Production Assistant
- Production Coordinator
- Production Executive
- Production Manager

- Production Supervisor
- Production Time Report Access
- Project Admin
- Talent Manager

Department Roles

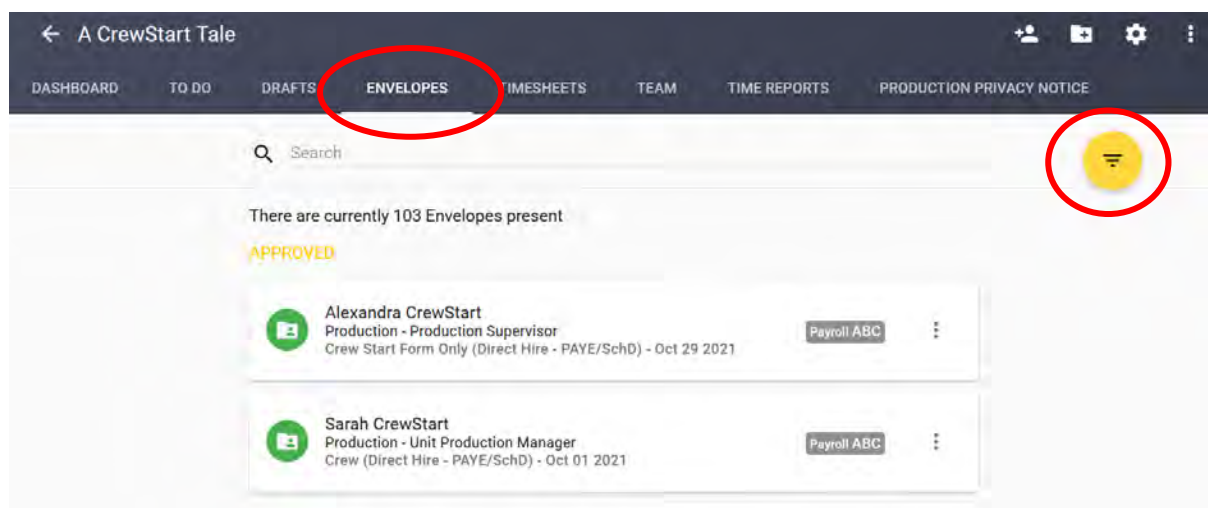
- Department Assistant
- Department Accountant
- Department Coordinator
- Department Time Report Access
- Departmental Talent Manager
- Departmental UPM
- Executive
- Head of Department

Managing Envelopes

To track the progress of envelopes sent to crew, go to the **Envelopes** tab within CrewStart.

Within this tab you will see a list of all envelopes that have been sent out to crew.

The envelopes can be filtered by Status, Department, Template and Week Commencing by clicking on the yellow circle icon on the top right-hand side.



- Pending Completion → team member has not completed
- Pending Approval → team member has completed but it has not yet been approved
- Approved → fully approved.

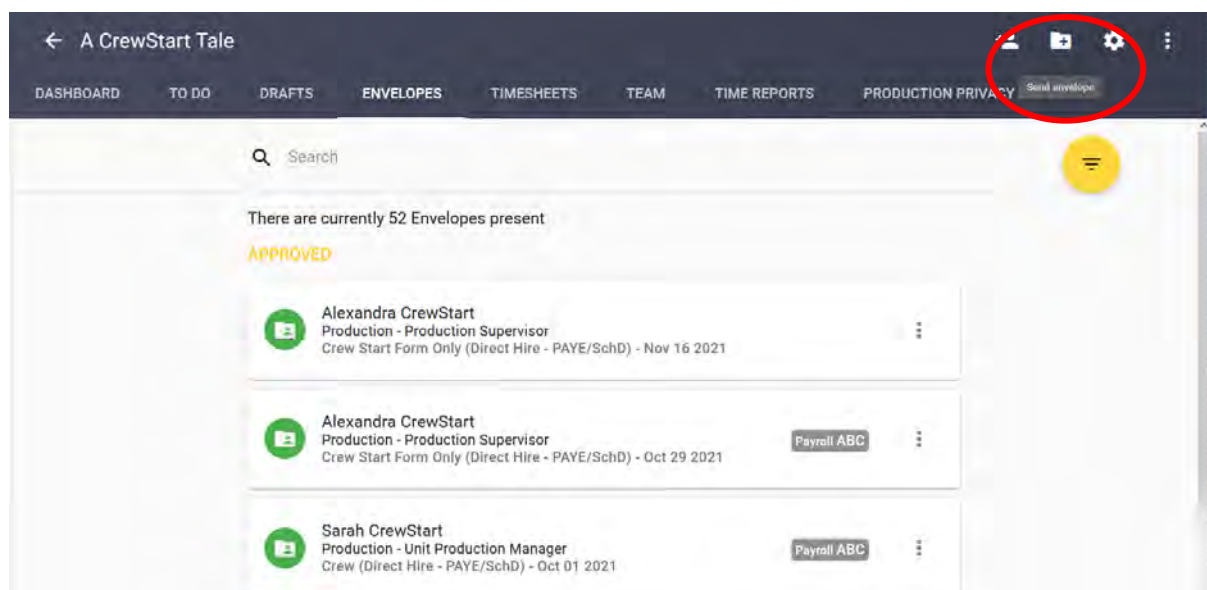
The number in red on the right-hand side of the envelopes indicates the number of days elapsed from the due date i.e. overdue; whereas a number in green shows number of days until the due date.



You can also send a reminder to the crew member (or approver) by clicking the bell icon, this works by sending an email reminder.

How to Send an Envelope

To send an envelope to a team member click the 2nd icon in the top right-hand corner.



Next select the recipient, the document(s) you want to include and indicate a **Due Date** (this is the date by which you would like the crew member to complete the envelope by).

In the next screen you will reach the **Pre send** stage. At this stage any incomplete sections will appear in orange, complete sections appear in blue. In the example below, you can see there are three sections highlighted in orange which are incomplete.

You can also see which fields still require completion by clicking on '**click here**' shown in blue text, example below:

Within each section, complete the relevant fields. Where you have previously sent an envelope and want to mirror the information, you can click **Auto-Complete** > search by template/name as required.

Once all the mandatory fields are complete, click **Next**. You will then come to the office use only section where coding information can be entered (this field is however not mandatory at this stage). Click **Next**.

You can then review the documents you are sending and click **Next** again. A summary will then appear, which also displays the approval chain.

Save **Share draft**

1. Summary 2. Pre send 3. Form Details 4. Office use 5. Documents 6. Send Envelope

Send your draft

Action the envelope

SEND THE ENVELOPE

SEND

Summary

Crew (Direct Hire - PAYE/SchD)
Envelope

Sarah CrewStart
Recipient

Due: Jan 19, 2022

Department: Production

Job title: Unit Production Manager

Salary and Holiday Ent: 2500.00

Approval Chain

- 1. Team Member: Sarah CrewStart
- 2. Executive Producer: Sarah CrewStart
- 3. Financial Controller: Charlie CrewStart

At the “Send Envelope” stage you have three choices:

- Click **Send the envelope** to send to the crew member
- **Save the envelope as a draft** (first icon in the top right) which you can then review in the **Drafts** tab on the CrewStart landing page
- **Share the envelope as a draft** with someone else to review (third icon in the top right). This person can then review the envelope and send on to the recipient for completion.



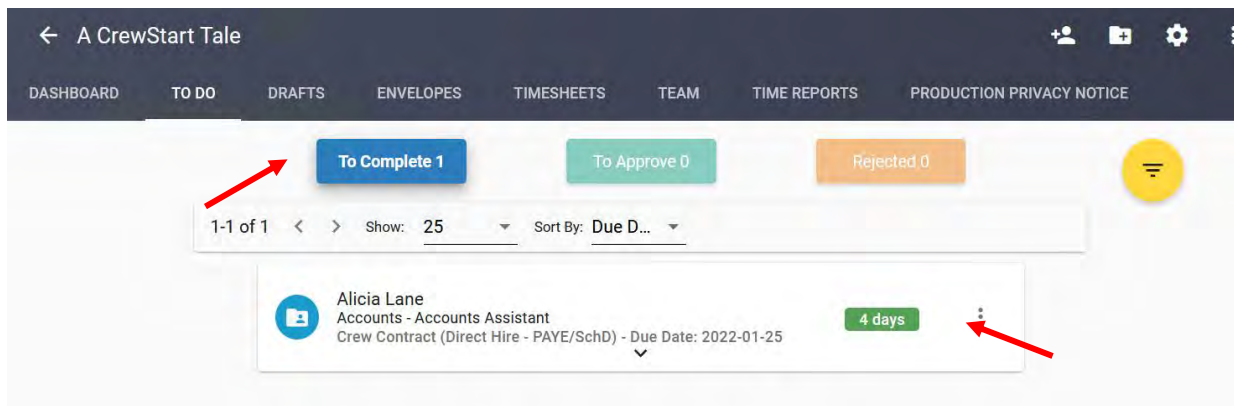
Video Tutorial

Completing an Envelope (Crew Member)

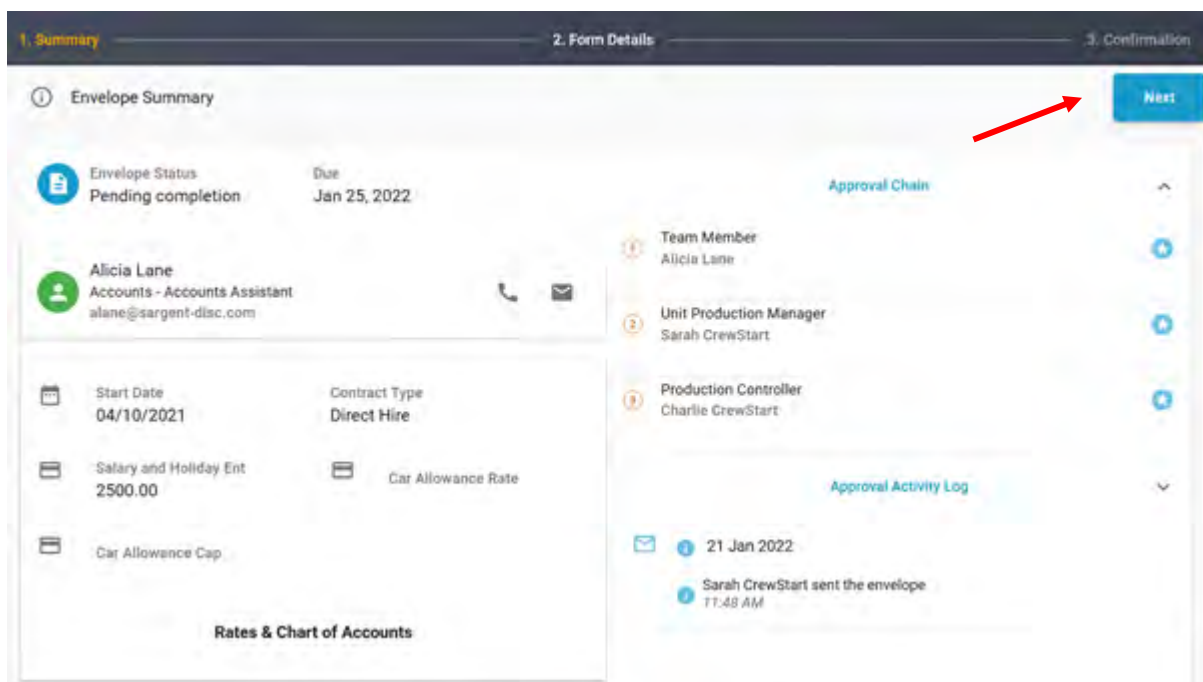
When an envelope requires completion, you will receive an email notification advising there is an envelope for your attention.

To view the envelope, you can either click on the link in the email or log into CrewStart and select the **To Do** tab.

Under **To Complete** you will see which envelope(s) requires your completion and the due date requested by the sender.



Click on the envelope to view the **Envelope Summary**.



Clicking **Next** then takes you to **Form Details** screen that outlines any sections that require you to complete them e.g. your personal details, ID&V documents, P45. The incomplete sections that require your attention will be indicated by an orange icon.


At this stage, if you have used CrewStart to fill out an envelope on a previous production, you can re-use your previous information by clicking **Auto Complete**.

When you have filled in all of the required details, click **Next** to reach the Confirmation screen.

To accept the documents, click the **Sign All** or **Accept** button

- Scroll through the documents until the end and check you are happy with them
- Select “I have read and agreed”
- Enter your signature in the white box
- Where there are multiple documents in the envelope, CrewStart will prompt you to read, agree and sign each one. To save time, click on **Apply Previous Signature**
- Complete final signature to sign off entire envelope

✕ Alicia Lane - Accounts Assistant - Accounts - Crew Contract (Direct Hire - PAYE/SchD)

Page 1 

Enter your signature in the box below
 Now you can use stored signature to sign documents!
[click here to configure](#)



SIGN **CLEAR**

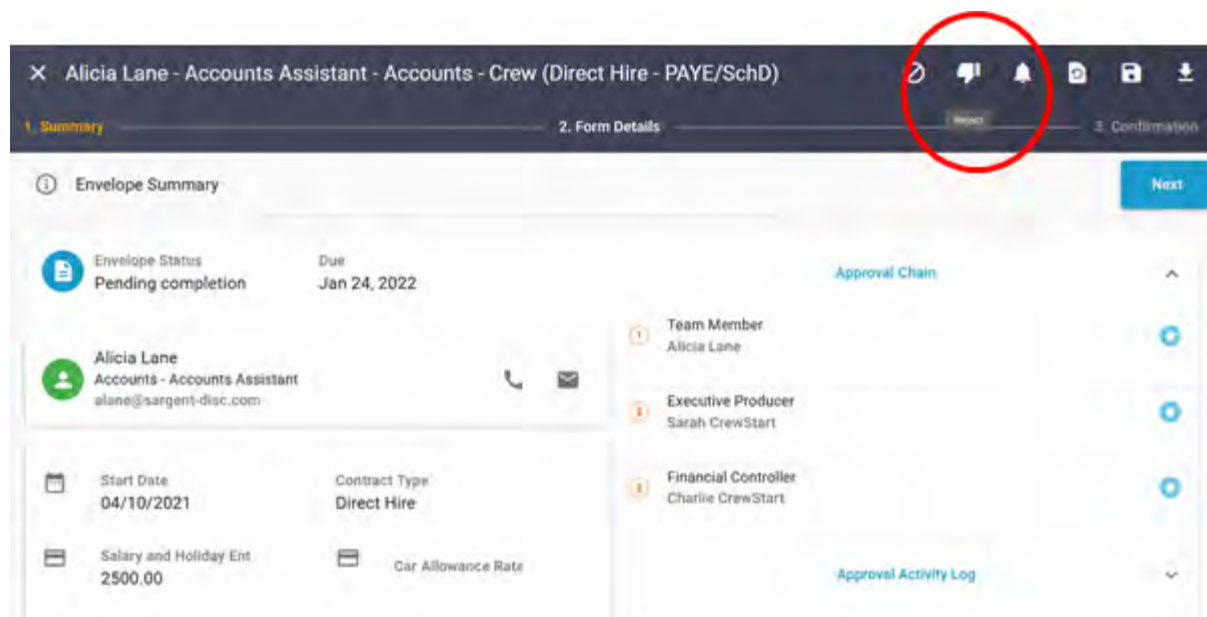
Once you have signed off all the documents in the envelope, they will be sent to the Approver.



Video Tutorial

Rejecting an Envelope (Crew Member)

If you need to reject an envelope back to the Sender (e.g. if there is incorrect information or something missing) click the **Thumbs Down** icon in the top right-hand corner.



This will take you to the **Confirmation** screen

- Type a reason for rejecting the envelope
- Click **Confirm The Rejection**
- This will then send the envelope back to the sender

1. Summary 2. Form Details 3. Confirmation

Please select desired action for this envelope

Documents [SIGN ALL](#)

- Crew Start Form (Direct Hire)
- Non-Guild Crew Deal Memo - Direct Hire
- NDA Form

Reject Envelope

You have selected to Reject this Envelope. This action will send the envelope to the previous step in the approval chain for corrections or additional information. Please provide a reason for rejection.

Comment
Incorrect Start Date

Required

[CONFIRM THE REJECTION](#)

To check that the envelope has been successfully Rejected, click on the **To Do** tab and you will see the envelope listed under **Rejected**

DASHBOARD TO DO DRAFTS ENVELOPES TIMESHEETS TEAM TIME REPORTS PRODUCTION PRIVACY NOTICE

To Complete 0 To Approve 0 Rejected 1

1-1 of 1 < > Show: 25 Sort By: Due Date: Newest/Oldest

Alicia Lane
Accounts - Accounts Assistant
Crew (Direct Hire - PAYE/SchD) - Due Date: 2022-01-24

3 days

How to Approve an Envelope (Approver)

Once an envelope has been completed by a team member, you (the Approver) will receive an email notification that an envelope in CrewStart requires your approval.

Follow the link in the email or log in to CrewStart and click on the **To Approve** button in green which appears within the **To Do** tab.



Indicates there are required fields to be completed in the Office Use section of the envelope.



Indicates the number of documents that are signed/requires signing. The number indicator will not show if no more documents require signing.

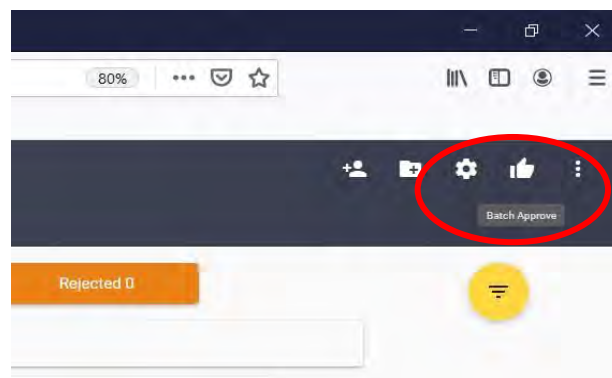


An enabled 'thumbs up' indicates that the envelope can be batch approved.

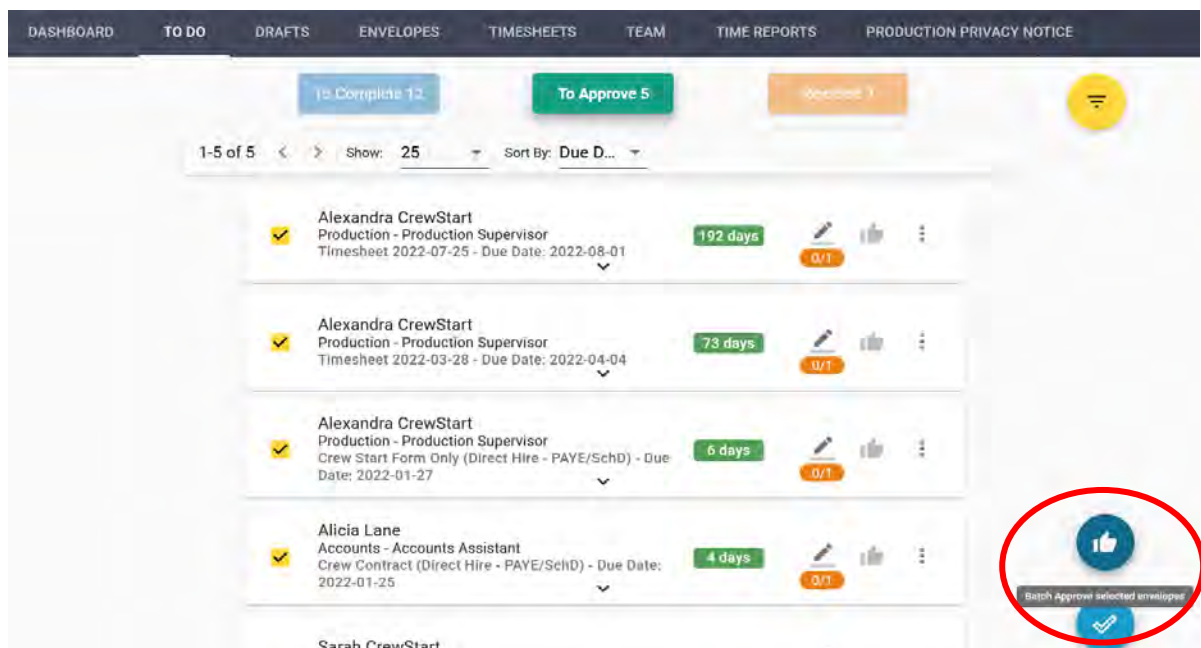


Up/Down arrow opens/closes the envelope summary and the attachment information dropdown.

Where you have a large number of envelopes to approve, you can use the batch approval feature by clicking on the **Thumbs Up** icon on the top right-hand side. This will allow you to select and unselect which envelopes you would like to approve.

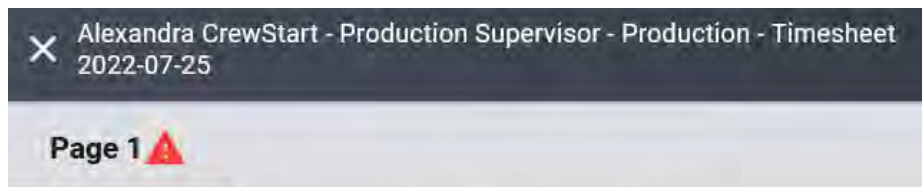


Once you have selected which envelopes you would like to approve, click on the **Thumbs Up** icon again, this time in the bottom right.



All of the documents requiring an approval signature within the envelopes selected will then be displayed sequentially for you to sign off.

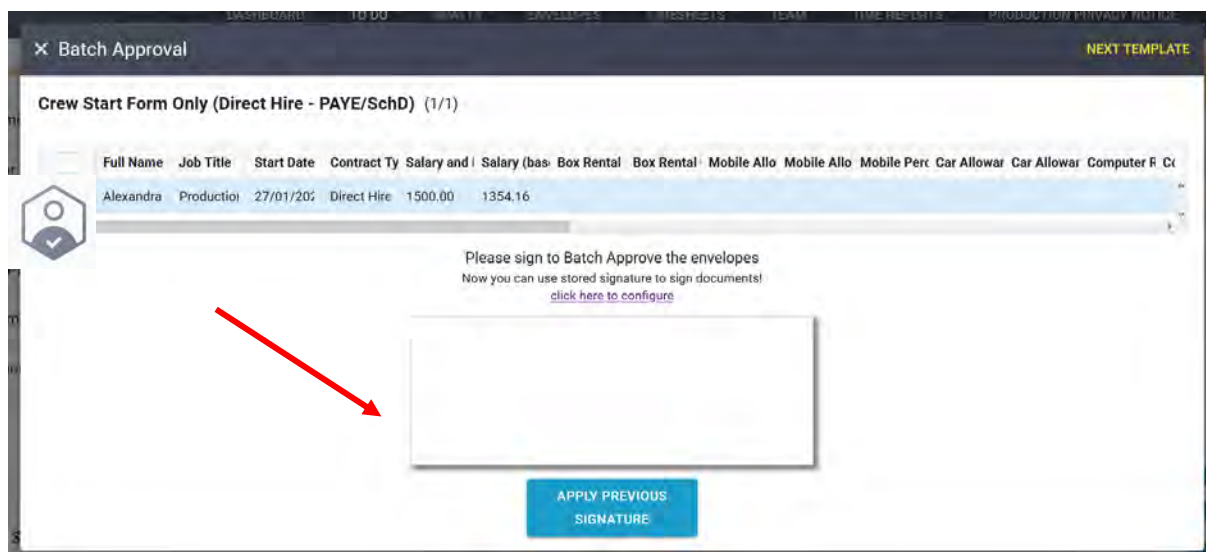
If you stay logged into CrewStart whilst signing off documents, the system will remember your signature. Click **Apply Previous Signature**.

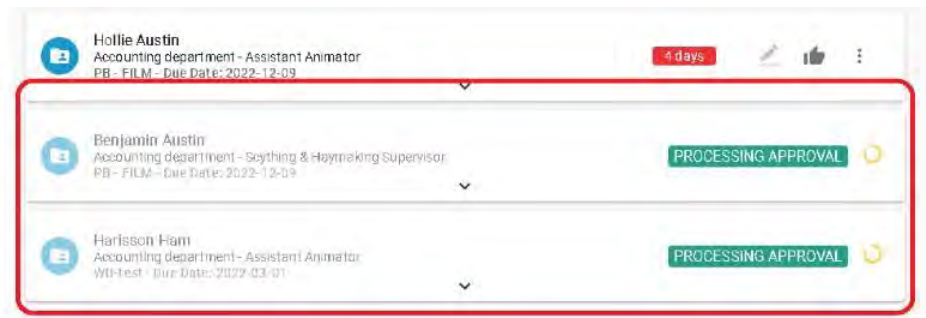


Enter your signature in the box below
Now you can use stored signature to sign documents!
[click here to configure](#)

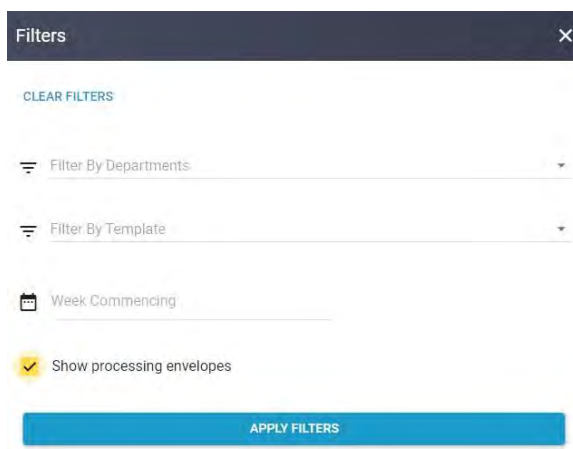


Once all of the documents have been individually signed you will then be presented with a summary of all documents signed, where you can then sign off the whole batch with a final signature.

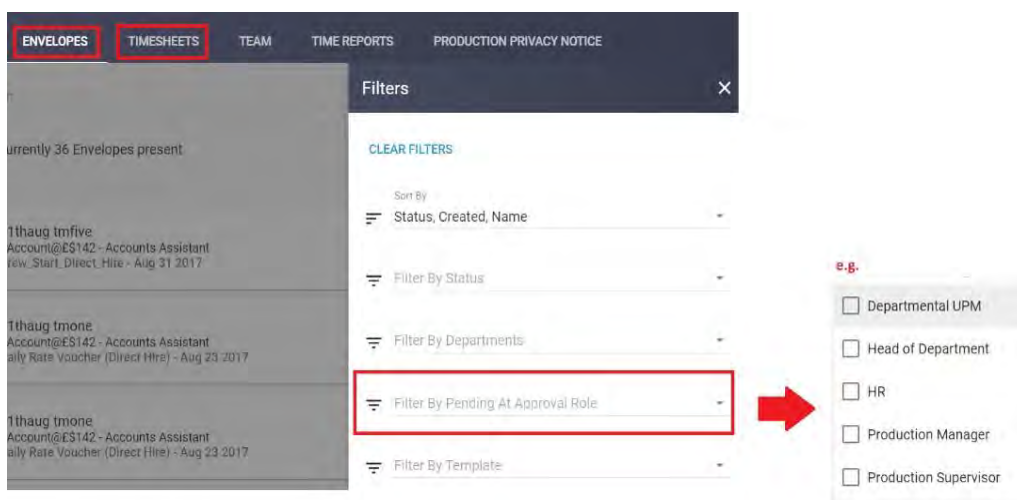




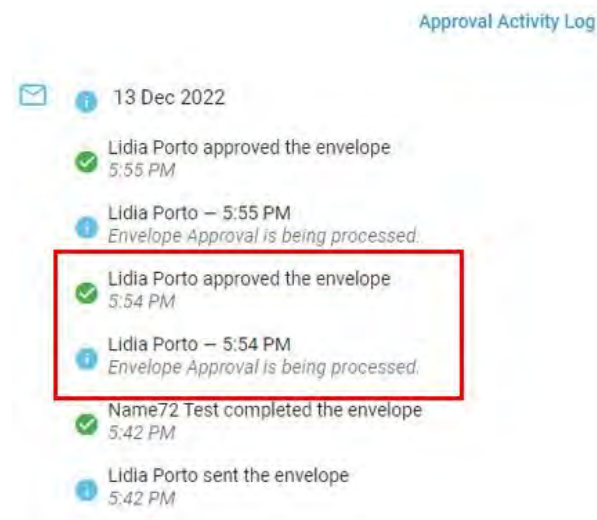
A filter can be visible to show the envelope being processed. By default, the filter is deactivated on the “TO DO” tab and checked on the other tabs. This means that by default, when approving envelopes on the “TO DO” tab, you will not see which envelopes are being processed in the background, but you can see those that are being processed while working on the other tabs.



The ‘Pending at Approval Role’ filter has been introduced to handle envelopes pending approval. It is only available for project or departmental level security role users on both the ‘Envelopes’ and ‘Timesheets’ tabs.



The Approval Activity Log shows when the envelope was forwarded for processing, and when it was approved.



If the approval fails, the envelope reverts to its previous state, is recorded in the Approval Activity Log, and an email is sent to the user.

Envelope Tagging – ‘On Hold’ Envelopes

Envelopes can be tagged as "On Hold" if they are not yet ready for approval, with a comment explaining why. The "On Hold" tag can be applied in both the To Do list view and the Individual Envelope view.

Here are some important points to keep in mind:

- Only users with the role to approve envelopes can add the "On Hold" tag.
- All security roles that can see the envelope, including the recipient, can view the "On Hold" tag.
- The "On Hold" tag can only be removed by performing actions such as Approve, Reject, Cancel, or Resend. It is a label, not a status.
- Any Admin or Project level role can cancel or resend an envelope, even if they are not on the approval chain, which clears the "On Hold" tag.
- Envelopes tagged as "On Hold" will be removed from the batch approval list by default when batch signing before batch approving.
- Users can still manually select envelopes with the "On Hold" tag for batch approval.
- The "On Hold" tag is visible in both the Envelope and Timesheet list views.

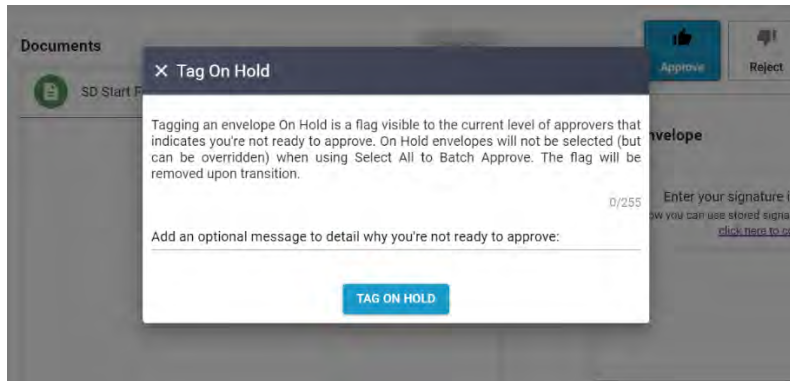
The "On Hold" tag is a helpful feature for managing envelopes and ensuring that only approved envelopes are sent out. Use it to stay organized and keep your approval process running smoothly.

How to Tag Envelopes as On Hold:

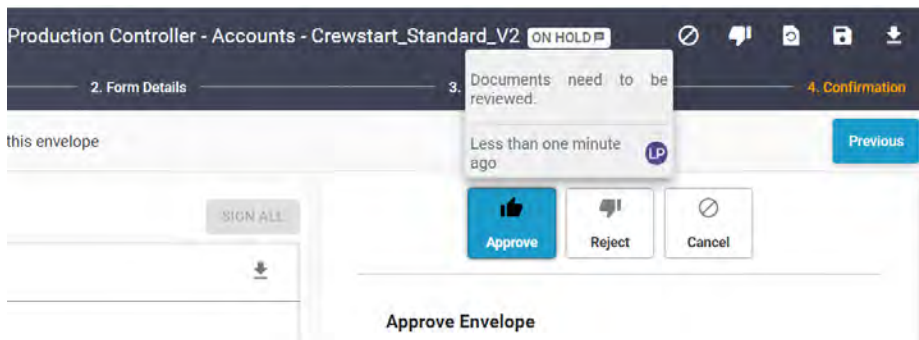
From Individual Envelope View:

Click on the Pan Tool icon located in the top right corner of the individual envelope page.

A modal will appear prompting you to add optional comments (limited to 255 characters).



An "On Hold" icon will appear at the end of the envelope title.

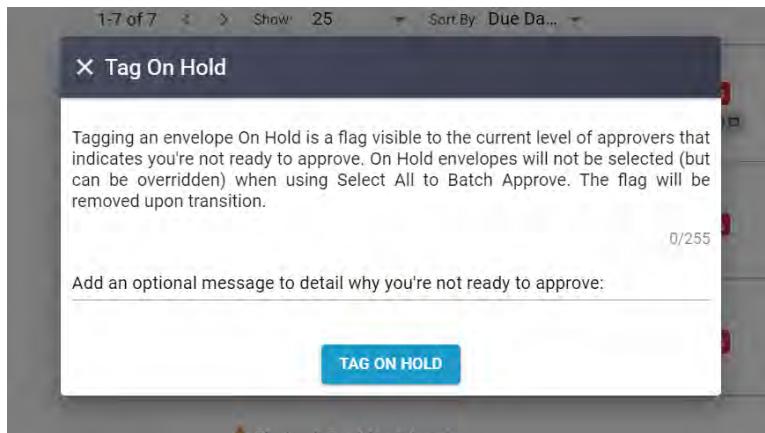


The "On Hold" tag will also appear in the To-Do list view, and you can hover over the tag to view more details.

From To-Do List View:

Click on the three dots and select "Tag On Hold".

Add any optional comments and then save the tag (limited to 255 characters).



The "On Hold" tag will appear in both the To-Do list view and individual list view (when clicking the envelope), and you can hover over the tag to view more details.

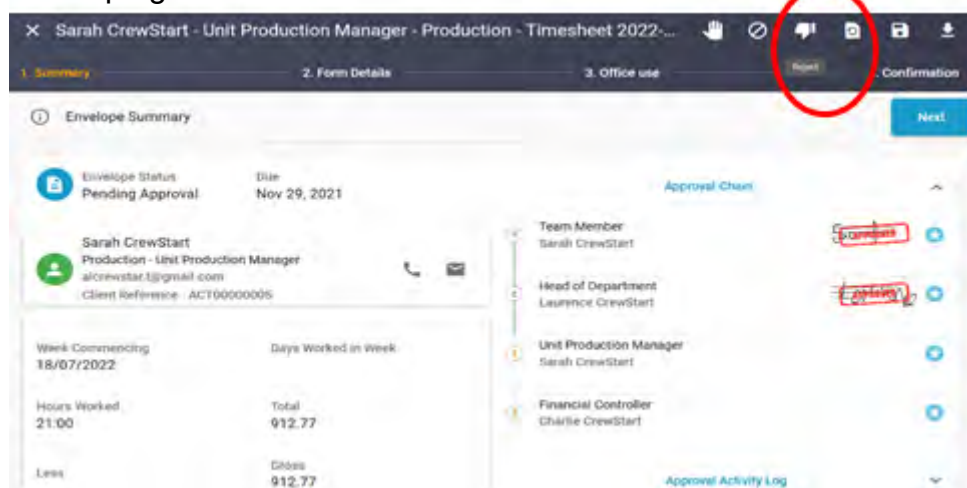
Envelopes with the "On Hold" tag will be unselected by default when batch approving:

Click on the "Batch Approve" icon located in the top right corner.

Envelopes with the "On Hold" tag will be unselected by default, but you can manually select them to include them in the batch approving process if desired.

How to Reject an Envelope (Approver)

If you need to reject an envelope back to the sender, crew member or previous approver (where you are an Approver in an approval chain) click the **Thumbs Down** icon in the top right-hand corner.



This will take you to the **Confirmation** screen

- Select a rejection level. The system will automatically pre-select the previous level in the approval chain as the default option
- Type a reason for rejecting the envelope
- Click **Confirm The Rejection**
- The envelope will be then sent back to that level. Please note that **this action will remove all signatures and approvals from the selected level and above**

The screenshot shows the 'Reject Envelope' confirmation screen. At the top, there's a progress bar with four steps: 1. Summary, 2. Form Details, 3. Office use, and 4. Confirmation (highlighted in orange). Below the progress bar, there's a 'Previous' button. The main area is titled 'Reject Envelope' and contains the following elements:

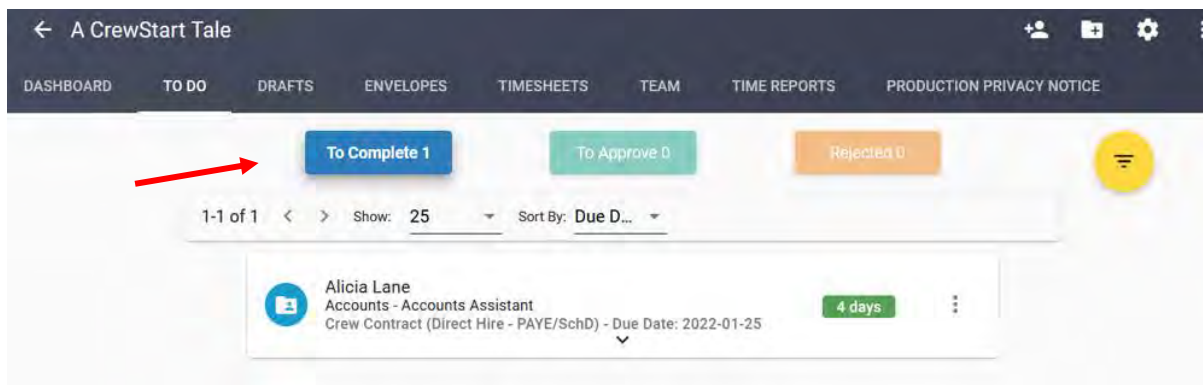
- A 'Documents' section on the left with a 'Crew Hand book' document.
- A 'Reject' button (highlighted in blue) and a 'Cancel' button.
- A text prompt: 'You have selected to Reject this Envelope. Please choose a level in the approval chain to send this envelope back to and provide a reason for rejection.'
- A 'Rejection Level' dropdown menu with '2 Departmental Talent Manager' selected.
- A 'Comment' field with 'P45 missing' entered.
- A 'Required' field.
- A warning message: 'Rejecting will remove all signatures and approvals for the level selected and above'.
- A 'CONFIRM THE REJECTION' button (highlighted in blue).

Three red arrows point to the 'Rejection Level' dropdown, the 'Comment' field, and the 'CONFIRM THE REJECTION' button.

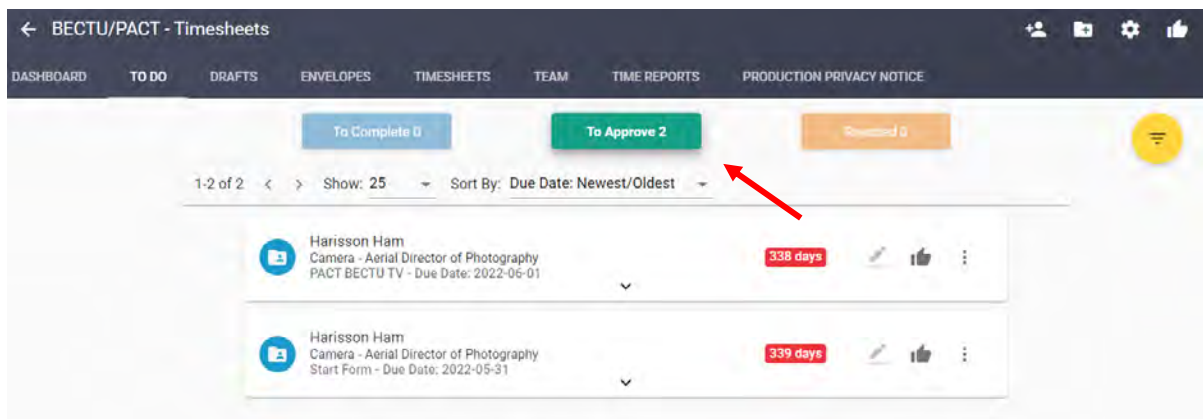
If you reject back to Sender, this will appear under **Rejected** on the Sender's **To Do** tab.

The screenshot shows the 'To Do' tab in the system. The top navigation bar includes 'DASHBOARD', 'TO DO', 'DRAFTS', 'ENVELOPES', 'TIMESHEETS', 'TEAM', 'TIME REPORTS', and 'PRODUCTION PRIVACY NOTICE'. Below the navigation bar, there are three buttons: 'To Complete 0', 'To Approve 0', and 'Rejected 1' (highlighted in orange with a red arrow pointing to it). Below these buttons, there's a filter bar with '1-1 of 1', 'Show: 25', and 'Sort By: Due Date: Newest/Oldest'. Below the filter bar, there's a list item for 'Alicia Lane' (Accounts - Accounts Assistant) with a 'Due Date: 2022-01-24' and a '3 days' status.

If you reject back to Team Member, this will appear under **To Complete** on that Team Member's **To Do** tab.



If you reject back to one of the previous approvers, this will appear under **To Approve** on that Approver's **To Do** tab.



How to Assign & Export Start Paperwork to Payroll

CrewStart allows the production to send their approved and completed Start Forms electronically to the Sargent-Disc Payroll team.

N.B. To export start paperwork to Payroll the CrewStart user assigned this responsibility must also be a payroll application user.

Envelopes containing Start Forms are available for export to Payroll either once they are fully approved or when they have reached a nominated level of approval e.g. the production office may permit envelopes to be exported once the UPM has approved, but the production executive is yet to approve.

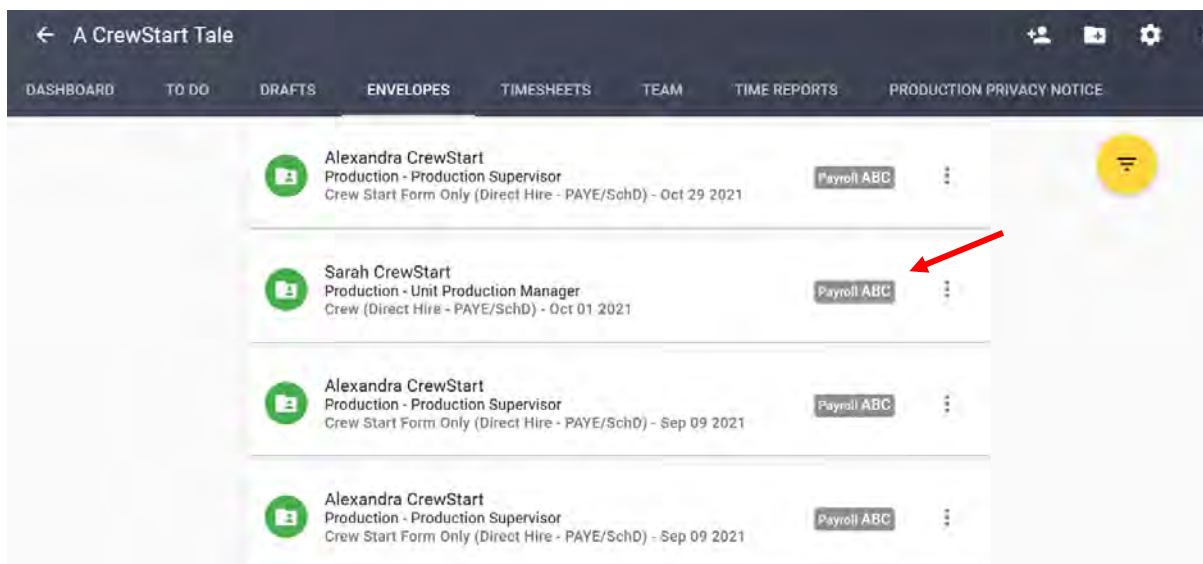
To start the process, go to the **Envelopes** tab within CrewStart. Filter envelopes by required status e.g. approval envelopes.

Envelopes need to be assigned to Payroll before they can be exported to Payroll.

To assign or re-assign an envelope to a Payroll, you will need to click on the three dots next to the envelope and then **Assign Payroll**: choose which payroll you would like to assign it to from the dropdown.

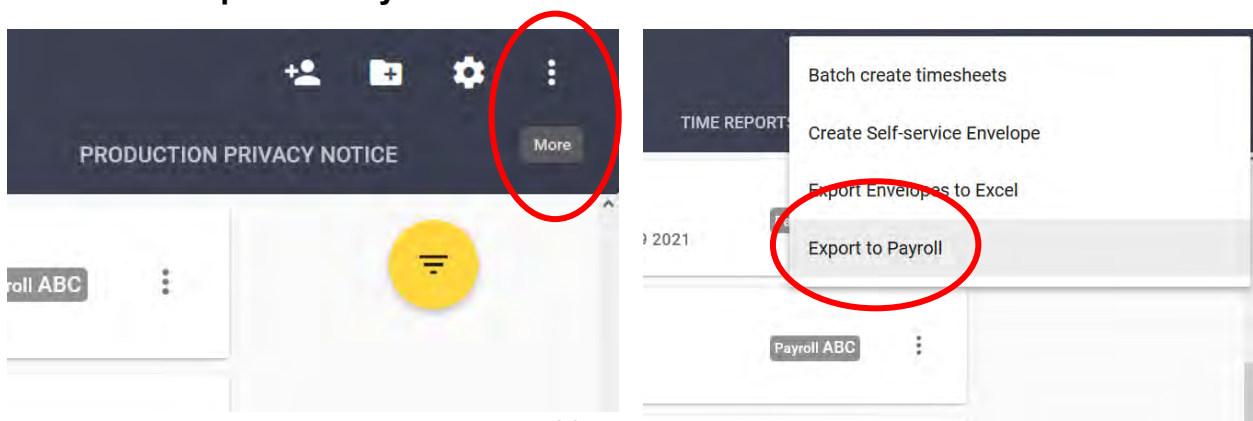


Envelopes that are already assigned to payroll and ready for exporting will be indicated by a grey icon on the right-hand side. Envelopes that have already been assigned & exported to Payroll will be indicated by a blue icon on the right-hand side as opposed to grey. In the example below, the envelopes are assigned to “Payroll ABC” and are ready to be exported to Payroll.



Once the envelopes are assigned to payroll and you are ready to export

- Click the **three dots** in the right-hand corner
- Click **Export To Payroll**



Choose which envelopes you would like to export by selecting/unselecting.

- Fully Approved envelopes will be selected by default, you may also see a list of
- Partially Approved envelopes to export if you have nominated level of approval set up.

1. Payroll Selection — 2. Envelope selection — 3. Summary

Please select envelopes you want to export Previous Next

Envelopes assigned to ABC Project:

14 envelope(s) selected

SELECT ALL APPROVED ENVELOPES SELECT ALL UNAPPROVED ENVELOPES DESELECT ALL

Approved envelopes

<input checked="" type="checkbox"/>		Sarah CrewStart Production - Unit Production Manager Crew (Direct Hire - PAYE/SchD) - Oct 4, 2021	ABC	⋮
<input checked="" type="checkbox"/>		Alexandra CrewStart Production - Production Supervisor Crew Contract (Loan Out) - Apr 12, 2021	ABC	⋮
<input checked="" type="checkbox"/>		Alexandra CrewStart Production - Production Supervisor Crew Start Form Only (Direct Hire - PAYE/SchD) - Apr 30, 2021	ABC	⋮

Once relevant envelopes have been selected to export, click **Next** and type your message to the Payroll department. All of the selected envelopes will be included in this message.

Finally, click Export to Payroll to send to Sargent-Disc.

Once received by Payroll at SD, the electronic documents will be imported into the SD Payroll system, checked and new employee records created, ready for payroll processing.

A CrewStart Tale - Payroll Export

1. Payroll Selection 2. Envelope selection 3. Summary

Compose your message for payroll

Subject
Message from CrewStart

Message*
Hi Payroll team - starters for week 33 attached

47 / 255

Templates included in this export:

Crew (Direct Hire - PAYE/SchD)

1 envelope(s)

EXPORT TO PAYROLL

Your payroll export process is now complete.



Video Tutorial

Time Reports and Timesheets

Time Reports are used by the production office to collate information on time & attendance.

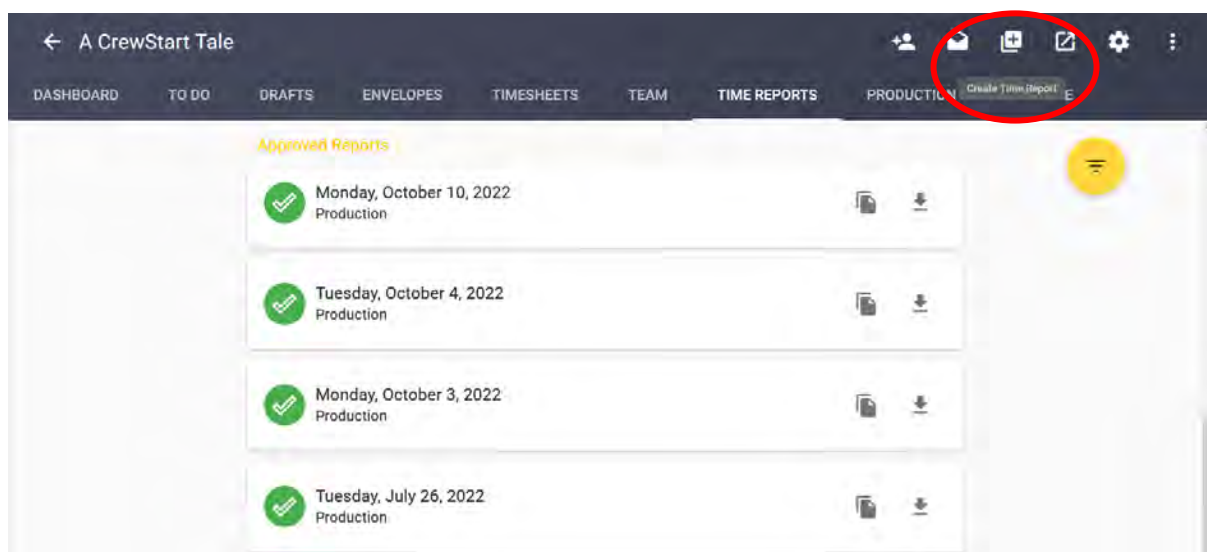
- Typically, one or two delegates per department would be responsible for completing Time Reports for their department for the whole day.
- Delegates do not need to log Time Reports on a daily basis if they don't want to – they can be backdated, future-dated or input on a weekly basis
- This speeds up the gathering of time and attendance and enables reporting on overtime costs every day.
- Special security roles within CrewStart allow delegates to enter time attendance for their department whilst restricting the ability to see crew member rates.

Once Time Reports have been approved, **Timesheets** can be batch generated, sent out to each department prefilled, ready for review & electronic sign-off.

- Crew members will have the opportunity at this stage to review their timesheet and raise any questions.
- Timesheets can be exported into Excel, where data can be viewed at a more granular level.
- The spreadsheet can then be submitted to the SD Payroll team for processing. At this stage payroll accountants have the ability to edit the spreadsheet before submitting it. This is to be sent via message in the Payroll System.

Creating a Time Report

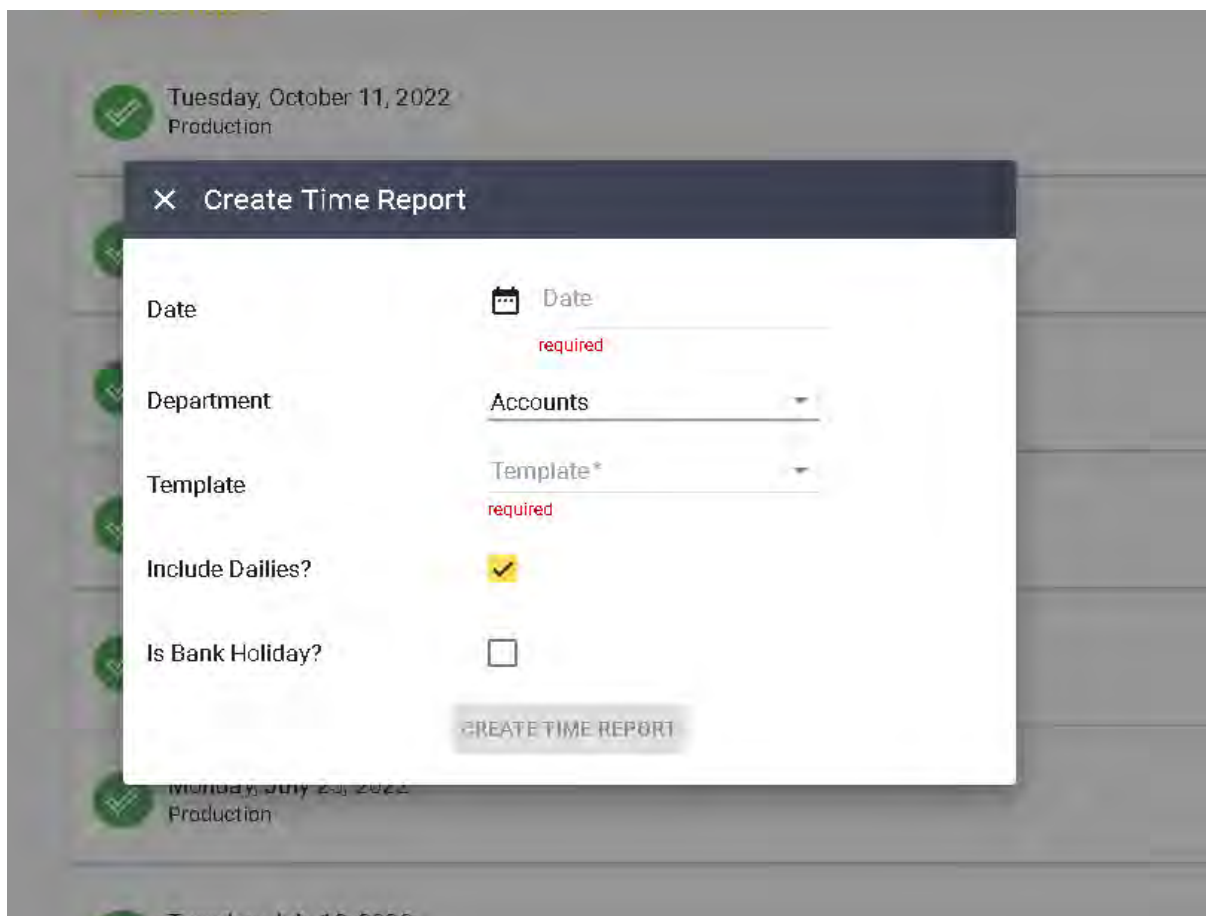
To create a Time Report within CrewStart click on the **Time Reports** tab. Within this tab you will see a list of time reports which have already been created.



At this stage, enter the date of the time report and the required department. You may be able to see one, several or all departments depending on your access and visibility within CrewStart.

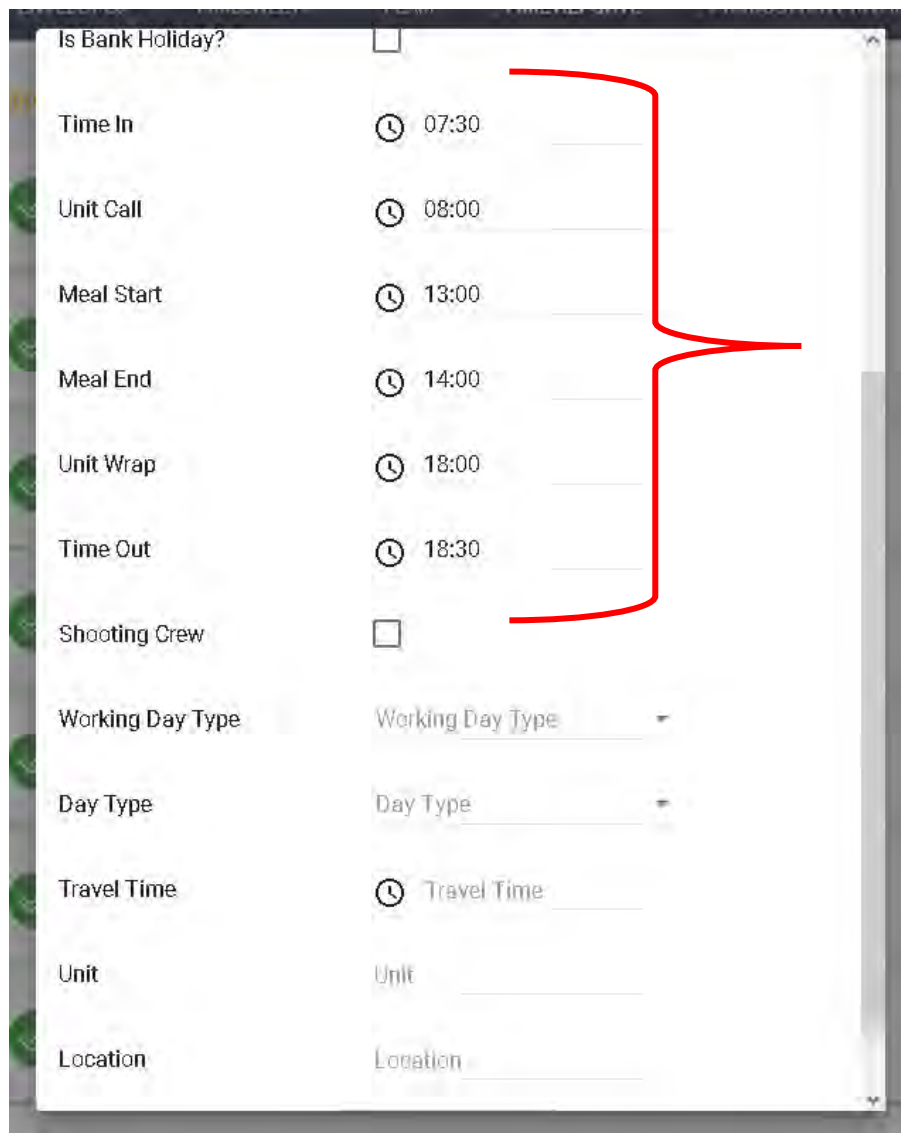
Once the department has been chosen:

- You will be asked to select a **Template** which is the set of rules for calculating overtime e.g. 'PACT/BECTU'.
- You will have the option to **Include Dailies** in the Time Report and remove any dailies you do not need in the next window, or you can choose not to include the dailies at this stage and then add dailies in the next window.
- You can also indicate **Bank Holiday** where necessary.



Next, you will need to enter general times for the department chosen, this would be the working times for the majority if not all of the department.

Here is an example below:



The screenshot shows a form with the following fields:

Field	Value
Is Bank Holiday?	<input type="checkbox"/>
Time In	07:30
Unit Call	08:00
Meal Start	13:00
Meal End	14:00
Unit Wrap	18:00
Time Out	18:30
Shooting Crew	<input type="checkbox"/>
Working Day Type	Working Day Type
Day Type	Day Type
Travel Time	Travel Time
Unit	Unit
Location	Location

A red bracket is drawn on the right side of the form, grouping the fields: Time In, Unit Call, Meal Start, Meal End, Unit Wrap, and Time Out.

Next, enter in the **Working Day Type** for example Standard Working Day (SWD) or Continuous Working Day (CWD).

Then choose **Day Type** e.g. Working or Turnaround. You can then enter **Travel Times, Unit** and **Location**.

Once the above has all been completed you can then create your **Time Report**.

- This populates a table with for whole department, pulling through the details you entered in the previous stage.
- At this stage you can modify variables at an individual level where required e.g. the times worked, type of working day etc.

Time Report - 2022-01-20, Production Department

Showing 6 / 6 Team Members Thursday, January 20, 2022 Department Production Is Bank Holiday?

TIMES

Status	First Name	Last Name	Salary Cat	Day	Job Title	Pre Call Ti	Post Wrap	Time In	Unit Call	Meal Start	Meal End	Unit Wrap	Time Out	Shooting C	Bank Holic	Working D	Day Type	Travel Tim	Group	Upgrade	Salary Allo
	Alexandra	CrewStart	Weekly	4	Production	00:30	00:30	07:30					18:30			CWD	Working				
	Jane	CrewStart	Daily	4	Production	00:30	00:30	07:30					18:30			CWD	Working				
	John	CrewStart	Weekly	4	Assistant 1	00:30	00:30	07:30					18:30			CWD	Working				
	Laurence	CrewStart	Weekly	4	Production	00:30	00:30	07:30					18:30			CWD	Working				
	Sarah	CrewStart	Weekly	4	Unit Prod.	00:30	00:30	07:30					18:30			CWD	Working	2			
	First	Name	Weekly	4	Best Boy	00:00	00:00	07:30					18:30			CWD	Working				

Where a row appears red, this means that overtime has been triggered: select the **Overtime** tab for further detail.

Time Report - 2022-01-20, Production Department

Showing 6 / 6 Team Members Thursday, January 20, 2022 Department Production Is Bank Holiday?

OVERTIME

Status	First Name	Last Name	Pre Call Overtime	Post Wrap Overti	Camera Overtime	Broken Turnarou	Meal Delay	Meal Curtailment	Bank Holiday Tim	6th Day Time	7th Day Time	Pre-Dawn (Pre Cs	Pre-Dawn (Post C
	Alexandra	CrewStart											
	Jane	CrewStart											
	John	CrewStart											
	Laurence	CrewStart											
	Sarah	CrewStart											
	First	Name		01:00									

The Time Report can be saved whilst you are still working on it.

When you are ready to do so, submit your Time Report for approval. It will then go through the required approval chain.

Within the **Time Reports** tab:

- Any time reports that have been submitted for approval will be marked with the orange clock icon
- Any time reports that are still being edited (therefore not ready for approval) will be marked with the orange pencil icon

A CrewStart Tale

DASHBOARD TO DO DRAFTS ENVELOPES TIMESHEETS TEAM TIME REPORTS PRODUCTION PRIVACY NOTICE

Unapproved Reports

Monday, October 17, 2022 Production	
Thursday, January 20, 2022 Production	

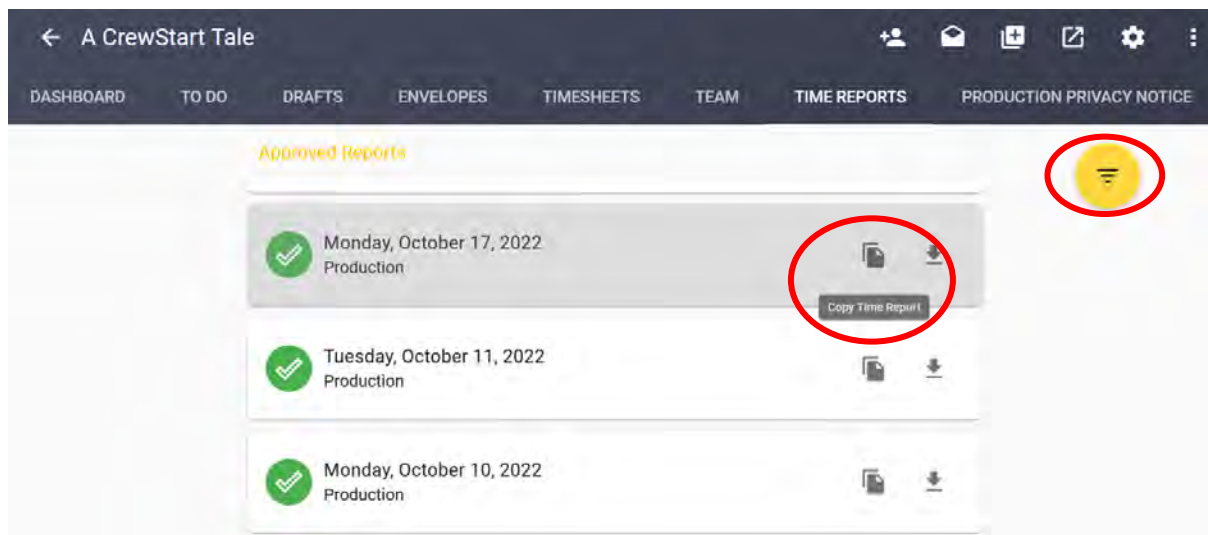


[Video Tutorial](#)

Duplicating an Existing Time Report

Previous time reports can be copied to create a new time report for another date, as long as it for the same department.

Within the **Time Reports** tab, click the copy icon next to the existing report you would like to copy. Time Reports can also be filtered by Department, Week Commencing and Day by clicking on the yellow circle icon also shown below.



N.B. If you have recently updated a team members global defaults (i.e. their Salary Rate), when using the copy time report function this will copy the rates stored within that time report rather than the updated rates stored within the team members global defaults.

To override this, you can either create a new time report (refer to Creating a Time Report) or follow the steps below.

Navigate to the new time report that has been created (from the copy function) > go to the Rates tab > Delete the 'Salary Daily Rate' > Select Save > Refresh the webpage.

This will then pull through the updated Salary Daily Rate from the team members global defaults.

Viewing Hot Costs & Approving Time Reports

Within the Time Reports tab, any reports awaiting your approval will be marked with the orange pencil icon.

To view hot costs and approve Time Reports you will need to be set up as an Approver.

- This access enables you view three additional tabs (**Rates**, **Costs** and **Allocations**) with the Time Report.

- You will also be able to change the Crew members daily rate(s) in the Rates tab, and add additional pay with reason in the Costs tab.

Entering times in the **Times** tab calculates overtime (hours): this multiplied by the hourly rates gives the total cost of overtime in GBP. Times can also be amended if necessary before approving a Time Report.

Time Reports can be downloaded into Excel at any stage, along with their Hot Costs, by clicking the download Time Reports icon in the top right of the CrewStart application.

- The Approver can specify day/week and department(s).
- They can also choose whether or not to include the costs in the report and can tailor the report by day or by department.

As an Approver, you have the ability to edit Time Reports. Click the **Edit** button in yellow in the top right-hand corner and then **Save** to save your changes.

When you are finished editing, click **Submit For Approval** in yellow in the top right-hand corner.

When you are ready to approve, click the **Tick** icon in the top right.

N.B. An Approver still has the ability to edit a Time Report even after it has been approved. Click on the **Reopen** icon in the top right-hand corner, edit the report and then you can either re-approve it yourself or send back the report to the delegate who logged the Time Report in the first place. The delegate will then need to amend and re-submit for approval.

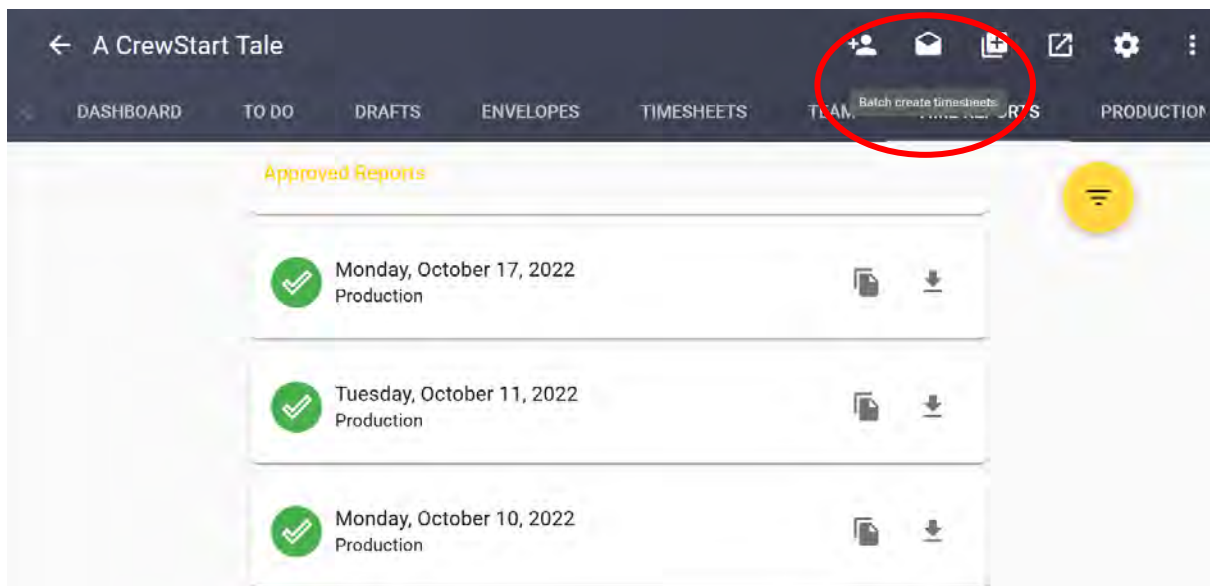


Video Tutorial

Batch Creating Timesheets

Once a whole week of Time Reports have been approved, **Timesheets** can then be batch generated and sent out to entire departments, pre-filled so that the crew member can review and sign-off.

To batch generate Timesheets, click on the **Time Reports** tab and then click on the envelope icon in the top right of the CrewStart application which says **Batch Create Timesheets**.



Click **Next** to then generate the batch, you will be presented with a list of crew members for the department and you will have three options

- **Preview Drafts** generates a PDF containing every timesheet in the batch, it does not send anything to the crew members and does not save as a draft in CrewStart.
- **Create Drafts** – draft timesheets will be saved only and available for you to view within the Drafts tab
- Clicking **Send Envelopes** will send the selected timesheets to the relevant department(s) of crew members.



Video Tutorial

Completing & Approving Timesheets (Crew Member)

As the Crew Member, you will receive an email notification advising you there is a Timesheet ready for your review & sign-off. You can do this in the same way you would review and sign-off a Start Form or Contract. See section “How to Complete an Envelope (Crew Member)” for a step by step guide.

- The Timesheet for approval will appear within the **To Do** tab in the CrewStart application and will be under **To Complete**
- You can reject the Timesheet back to the Approver if required (**Thumbs down** icon) and this will send the Timesheet back to the sender
- Once you have signed-off the Timesheet it will then progress through the relevant approval chain to be signed off (approved).

Approving Timesheets (Approver)

For those with Approver roles, when a Timesheet is ready for your approval it will appear in the Approver's **To Do** section within CrewStart under **To Approve**. See section "How To Approve an Envelope" for a step by step guide.

Self-Billing & Invoice Process

N.B. Currently these features are only available in the film timesheet. To enable the feature, users should contact the Sargent-Disc setup team.

When a crew member enters into a self-billing arrangement with a production, the crew global default can be updated in order to reflect this; allowing the crew member to upload their own invoice or approve the timesheet envelope as a self-billed invoice. The Invoice upload feature is available for Direct hire (Sch D/Self Employed) and Loanout. The crew member can choose to skip uploading an invoice.

To update the crew global default for self-billing go to the **Team** tab > select **team member** > Defaults > Global Default. The global default update is not required in order to use the Invoice Upload feature. Production can update the **Self Billing** status for the crew ie Opted or Not opted, VAT number, individual billing address or company address.

1. Summary 2. From Details 3. Confirmation

Please complete information below. When valid the "Next" button will be available. If not [click here](#) for details

Invoice Information

Self-Billing Details

Invoice Number	This is a required field
VAT Number	This is a required field
Billing Address	This is a required field
Billing Address 2	This is a required field
Billing Town	This is a required field
Billing Post Code	This is a required field
Net Total	0.00
VAT amount	0.00
Gross Total (Incl. VAT)	0.00

Pay Totals

The Invoice Information section will need to be completed by the crew member if the crew global defaults are empty.

Timesheet Payroll Export

As soon as Timesheets are drafted or sent, you will be able to download a timesheet report in Excel for the whole production within the **Timesheets** tab.

Click **Export** in the top-right, select Excel, Timesheets, Timesheet template and specify a week commencing date. This will download an Excel report of every timesheet for the production that has been sent or drafted.

The spreadsheet has two tabs, a summary tab with one row per person per week and a detail tab with one row per person per day. It will display each crew member's name, job title, tax status, w/c date, date the timesheet was created, approval status, payment totals and breakdown of each payment.

This spreadsheet can then be submitted to Sargent-Disc through the Payroll application as the payroll instruction spreadsheet. If necessary, the payroll accountant can make edits to the spreadsheet before sending it to SD Payroll team.

APPENDIX

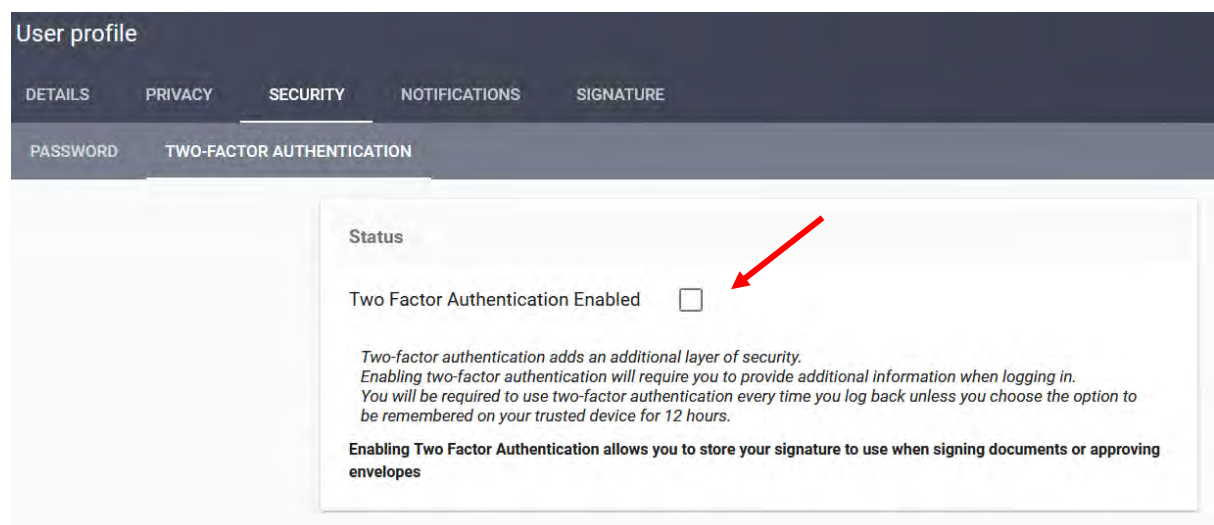
Enabling Multi Factor Authentication (MFA)

Two-factor authentication adds an additional layer of security. Please note

- Enabling two-factor authentication will require you to provide additional information when logging in
- You will be required to use two-factor authentication every time you log back in unless you choose the option to be remembered on your trusted device for 12 hours.

Click **User Profile > Security > Two-Factor Authentication**

Select **Two Factor Authentication Enabled**



The screenshot shows the 'User profile' page with tabs for DETAILS, PRIVACY, SECURITY, NOTIFICATIONS, and SIGNATURE. Under the SECURITY tab, there are sub-tabs for PASSWORD and TWO-FACTOR AUTHENTICATION. The TWO-FACTOR AUTHENTICATION sub-tab is selected, showing a 'Status' section. In this section, the text 'Two Factor Authentication Enabled' is followed by an unchecked checkbox. A red arrow points to this checkbox. Below the checkbox, there is explanatory text: 'Two-factor authentication adds an additional layer of security. Enabling two-factor authentication will require you to provide additional information when logging in. You will be required to use two-factor authentication every time you log back unless you choose the option to be remembered on your trusted device for 12 hours.' At the bottom of the status box, it says 'Enabling Two Factor Authentication allows you to store your signature to use when signing documents or approving envelopes'.

Ensure you have your mobile device to hand and that you have network coverage, click **Yes**



The screenshot shows a dialog box titled 'Enable Two-Factor Authentication'. The main text inside the dialog box asks: 'Enable Two-Factor Authentication? You will be redirected to the setup. Before proceeding, please ensure you have access to your mobile device with network coverage.' At the bottom right of the dialog box, there are two buttons: 'NO' and 'YES'.

Confirm your mobile phone number and country code are correct by clicking **Confirm Phone Number**

The screenshot shows the 'Two Factor Authentication Setup' interface. At the top, a progress bar indicates five steps: 1. Landing, 2. Secret Key, 3. Phone Number Verification (highlighted in orange), 4. Phone PassCode, and 5. Confirmation. Below the progress bar, the page title is 'Phone Number Verification'. The main content area features the CrewStart logo and the heading 'Two Factor Authentication Setup'. A message states: 'Please verify that your phone number is correct. It'll be used in case of Two Factor Authentication recovery'. Below this, there is a 'Country code' dropdown menu set to 'United Kingdom, Isle of Man (44)' and a 'Phone number' input field containing '79'. A red error message below the phone number field reads: 'Please remove any country code present in your phone number'. At the bottom, there is a large yellow button labeled 'CONFIRM PHONE NUMBER'.

Download an authenticator app on your phone and select the authenticator name, in the example below we have used Google Authenticator. Click **Next**


The screenshot shows the 'Two Factor Authentication Setup' interface. At the top, a progress bar indicates five steps: 1. Landing, 2. Secret Key, 3. Phone Number Verification, 4. Phone PassCode (highlighted in orange), and 5. Confirmation. Below the progress bar, the page title is 'Landing Page'. The main content area features the CrewStart logo and the heading 'Two Factor Authentication Setup'. A message states: 'Two Factor authentication as been enabled for your account'. Below this, it says: 'To proceed, you will need to download an authenticator App on your phone'. There is a section titled 'Select your favourite authenticator' with a dropdown menu set to 'Google Authenticator'. Below the dropdown, there are two buttons: 'GET IT ON Google Play' and 'Download on the App Store'. A blue 'Next' button is located in the top right corner.

Follow the steps on screen (using your mobile phone either scan the QR code or type the code into the app) to generate a token (six digits) on your authenticator App. Type the six-digit token into the box on screen:

The screenshot shows the 'Two Factor Authentication Setup' interface. At the top, a progress bar indicates five steps: 1. Landing, 2. Secret Key, 3. Phone Number Verification, 4. Phone PassCode, and 5. Confirmation (highlighted in orange). Below the progress bar, the page title is 'Secret key to configure your authenticator app'. The main content area features the CrewStart logo and the heading 'Two Factor Authentication Setup'. A message states: 'With your authenticator app, please scan the QR Code to associate CrewStart'. Below this, there is a large blue square representing a QR code. A red arrow points to a text input field below the QR code with the label 'If you're not able to take a picture, type this code instead'. Below the input field, there is a message: 'Please type the token given by your authenticator App to confirm the Two Factor authentication'. At the bottom, there is a large grey button labeled '123456'.

1. Landing 2. Secret Key 3. Phone Number Verification 4. Phone PassCode 5. Confirmation

Phone PassCode Previous Next

 CrewStart™

Two Factor Authentication Setup

☒ Remember me on this device for the next 12 hours

Please verify that your phone number is correct. It'll be used in case of Two Factor Authentication recovery


1 2 3 4

Your two-factor authentication is now set up:

Two Factor Authentication Setup

1. Landing 2. Secret Key 3. Phone Number Verification 4. Phone PassCode 5. Confirmation

Confirmation Previous

 CrewStart™

Two Factor Authentication Setup

Two Factor Authentication is now enabled on your Account. If you lose your authenticator, you can reinitialise it by asking an Account Admin or in your User Profile.

Now you can use stored signature to sign documents! Click in the link below to configure.

[GO TO CREWSTART](#) or [GO TO SIGNATURE SETUP](#)

Should you wish to disable two-factor authentication, Click **User Profile > Security > Two-Factor Authentication**

Untick the box **Two Factor Authentication Enabled**

User profile

DETAILS PRIVACY SECURITY NOTIFICATIONS SIGNATURE

PASSWORD TWO-FACTOR AUTHENTICATION

Status

Two Factor Authentication Enabled ☐

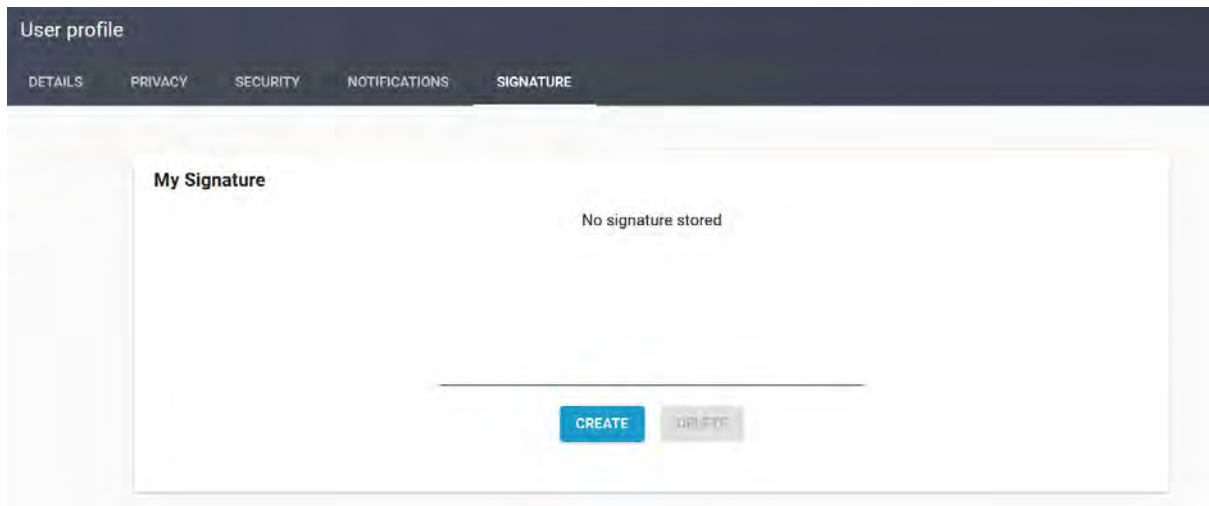
Two-factor authentication adds an additional layer of security. Enabling two-factor authentication will require you to provide additional information when logging in. You will be required to use two-factor authentication every time you log back unless you choose the option to be remembered on your trusted device for 12 hours.

Enabling Two Factor Authentication allows you to store your signature to use when signing documents or approving envelopes

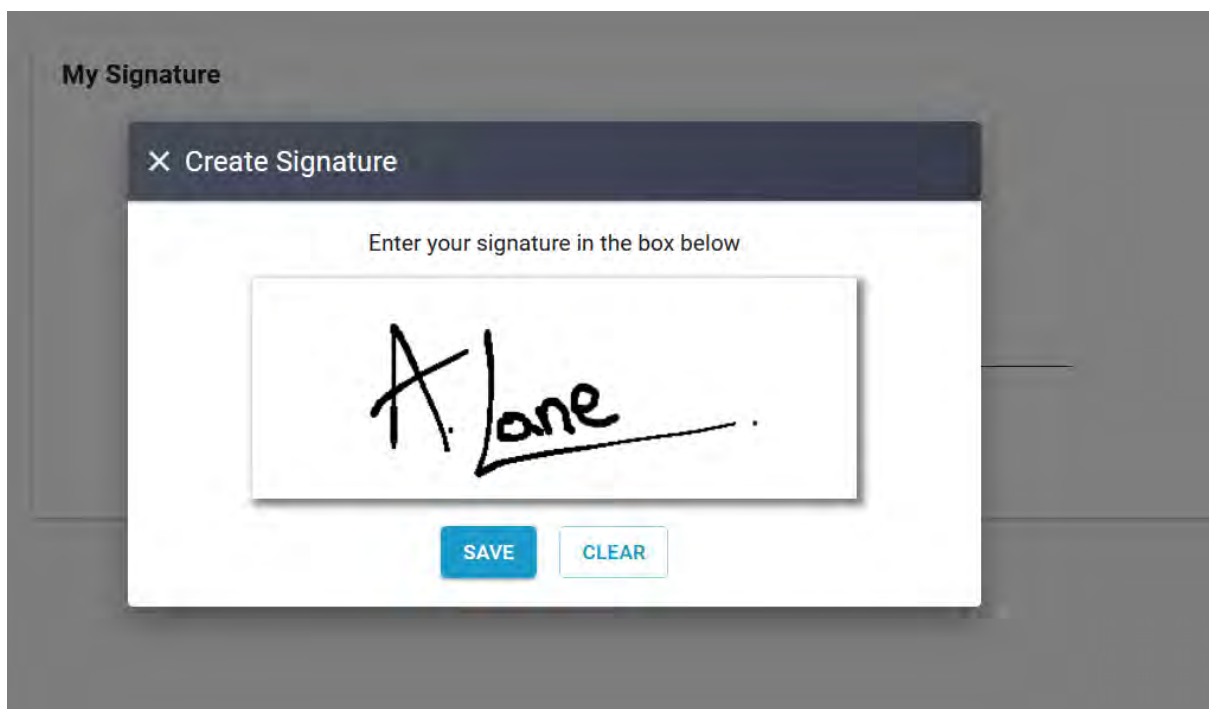
Storing Your Signature within CrewStart

N.B. You will need to enable MFA before you can store your signature within CrewStart

User profile > Signature

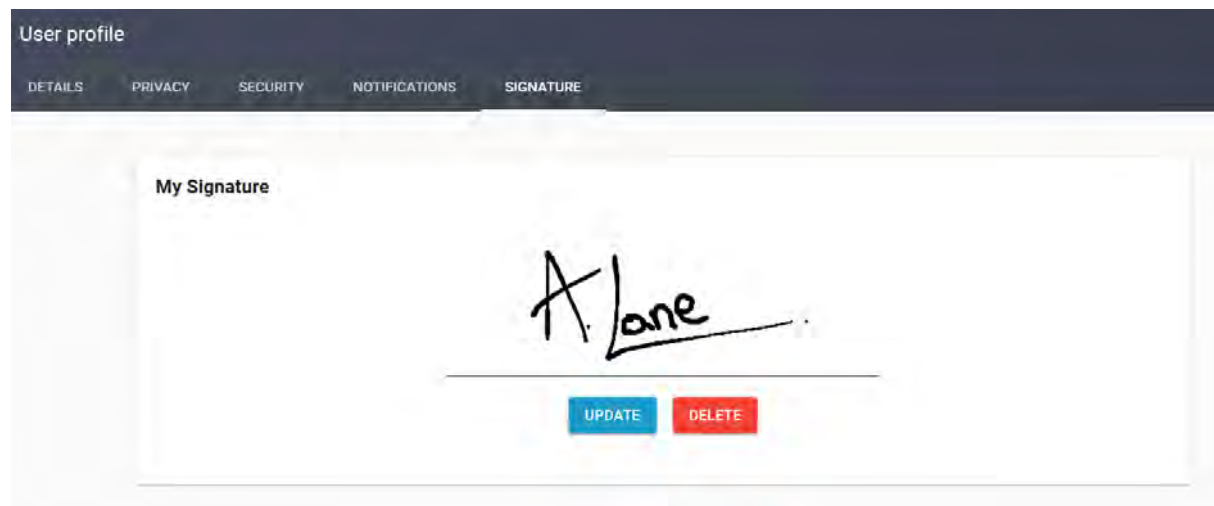


Click **Create** and draw your signature:



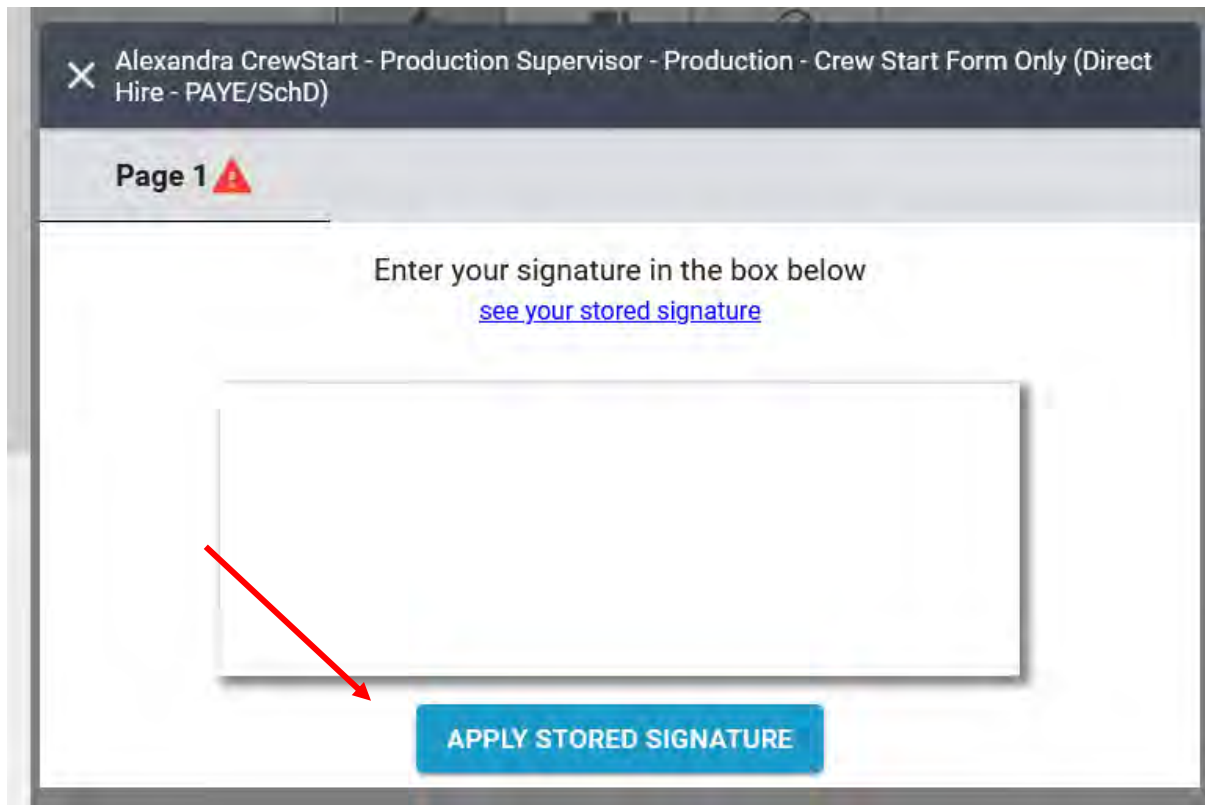
Once you have entered your signature, click **Save**. If you need to redraw your signature, click **Clear** and draw it again

Should you need to update (e.g. redraw) or delete your stored signature, click on **Update** or **Delete** as below:



How to Apply Stored Signature when Signing or Approving Envelope(s)

When you come to completing or approving an envelope, you will be presented with the option Apply Stored Signature:



You will also have the option to **See your stored signature** before applying. Please note that editing your stored signature by clicking Edit Signature will exit the signature process and take you to the My Signature section within your User Profile.

Managing your Signature

Within **User Profile > Signature** you can **Update** (edit) your signature or **Delete** your signature if required.

N.B. If you disable MFA within your User Profile, your stored signature will be deleted. If you re-enable MFA you can re-create and store your signature once more.

Managing your Notifications

Within **User Profile > Notifications** you can opt in/out of notifications relating to envelopes. Should you wish to receive a digest (summary) notification email, you can configure this within **Configure To Do Digest**

User profile

DETAILS

PRIVACY

SECURITY

NOTIFICATIONS

SIGNATURE

Email Notifications

I would like an email notification if an envelope:

is Rejected and

☒ I am the Sender

☒ I am an Approver

☐ I can See it

is Cancelled and

☒ I am the Sender

☒ I am an Approver

☐ I can See it

is Fully Approved and

☐ I am the Sender

☐ I am an Approver

☐ I can See it

I would like an email notification when I have an envelope:

☐ To Complete

☒ To Approve

Configure To Do Digest

☐ I would like a digest of my To Do notifications

Every Day

at approximately

repeated every

24:00

hours

UPDATE SETTINGS

47

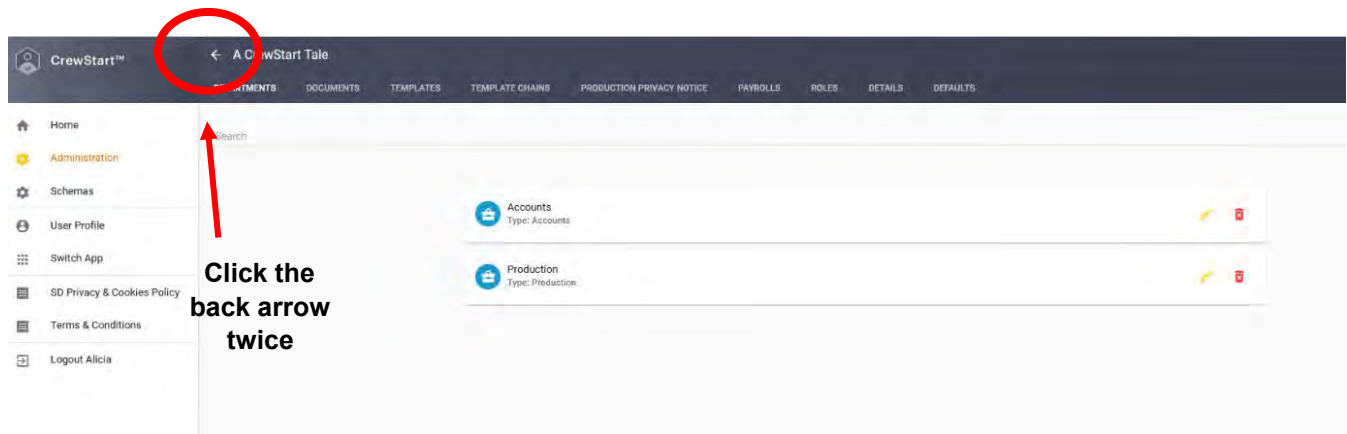
Adding an Agency or Agent to Your CrewStart Project

This can only be done by the Account Admin. Where you do not have an Account Admin please contact support@sargent-disc.com

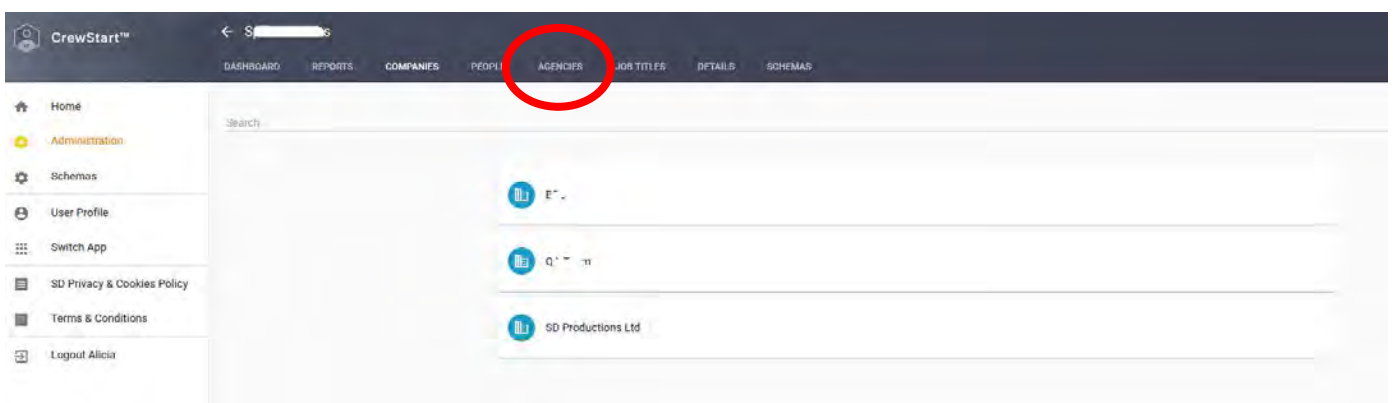
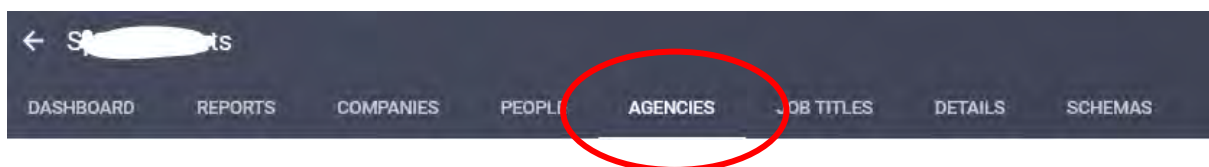
The Account Admin needs to log into CrewStart and select the Project.

Click the “**Project Admin**” cog in the top right-hand corner

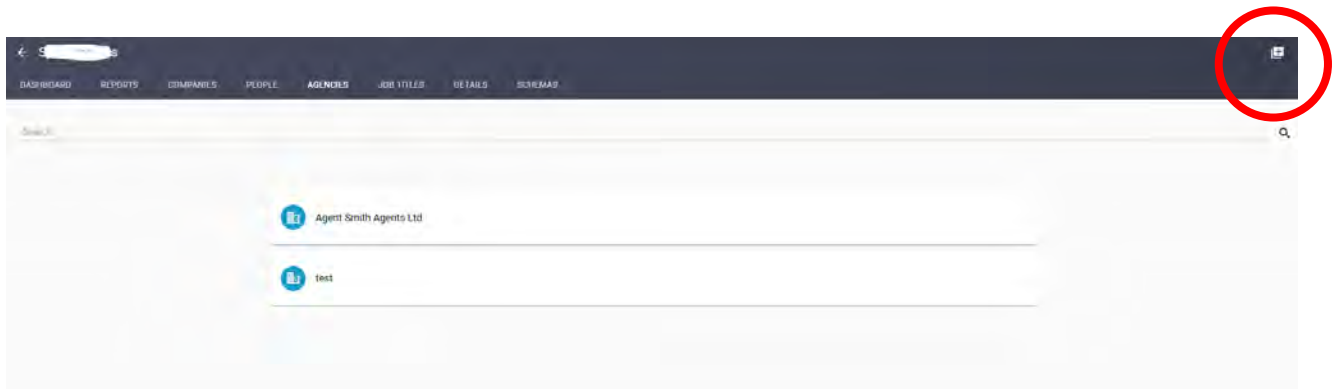
Then click the back arrow “←” next to the Project Name **TWICE**



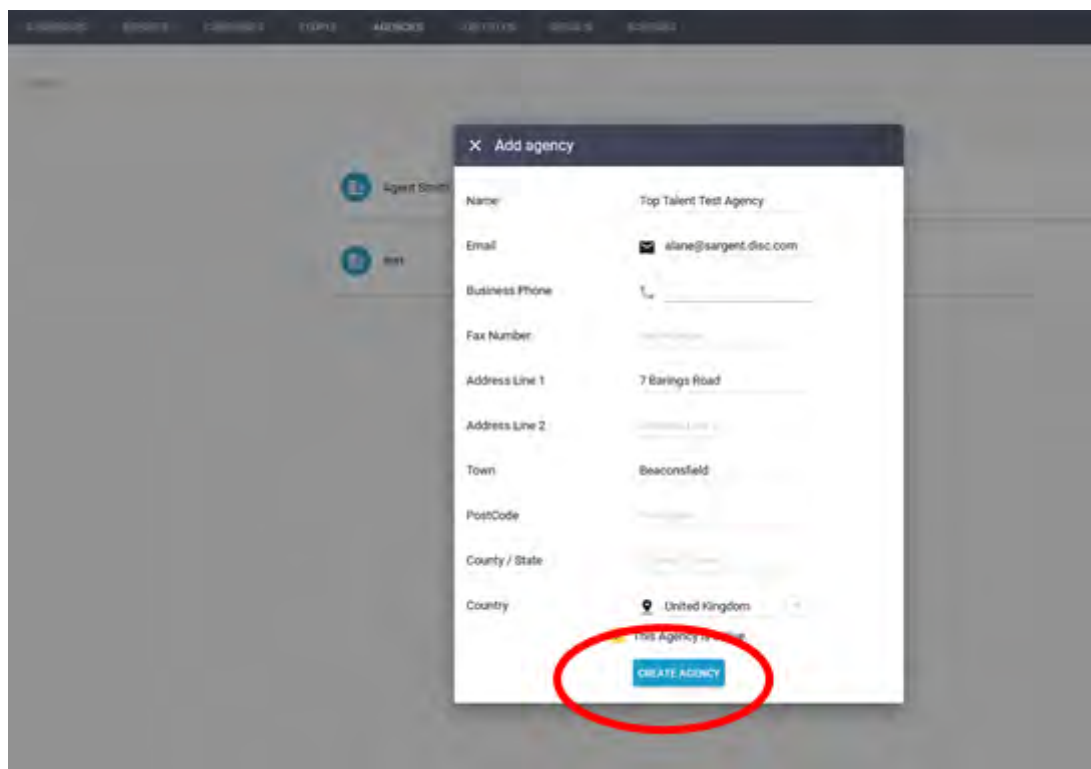
Within this view, you will be presented with the tab “**Agencies**” as below



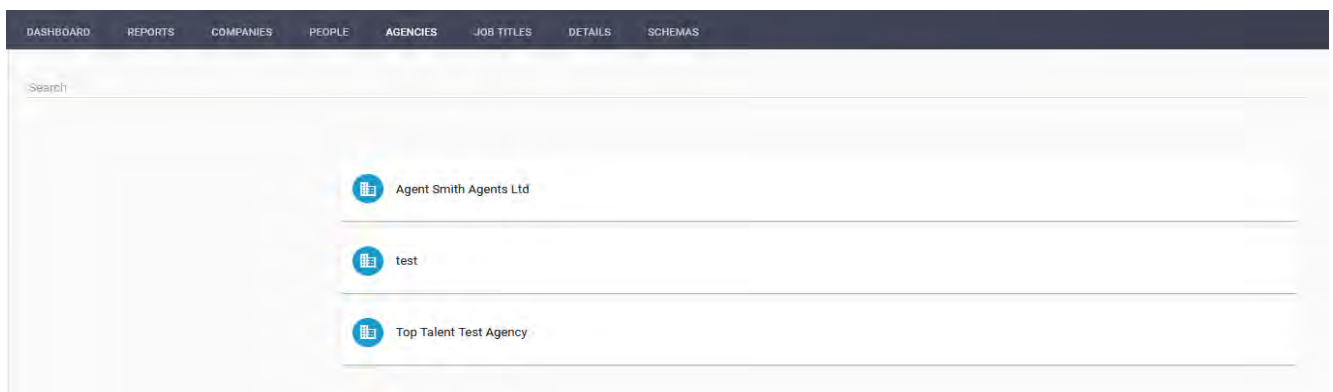
Click on “**Agencies**” and you will be presented with a list of existing Agencies (if there are any). To add an Agency, click on the plus icon “**Add Agency**” in the top right-hand corner.



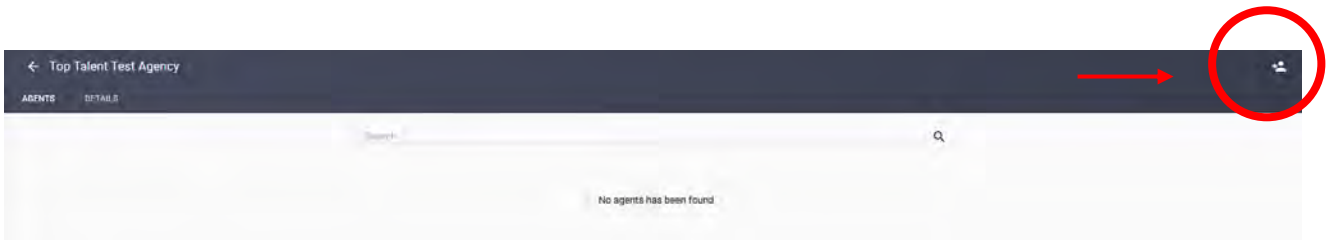
Complete the required fields and click “**Create Agency**”



The next step is to add Agents to the Agency. Within the **Agencies** tab, click on the new Agency you have just created:



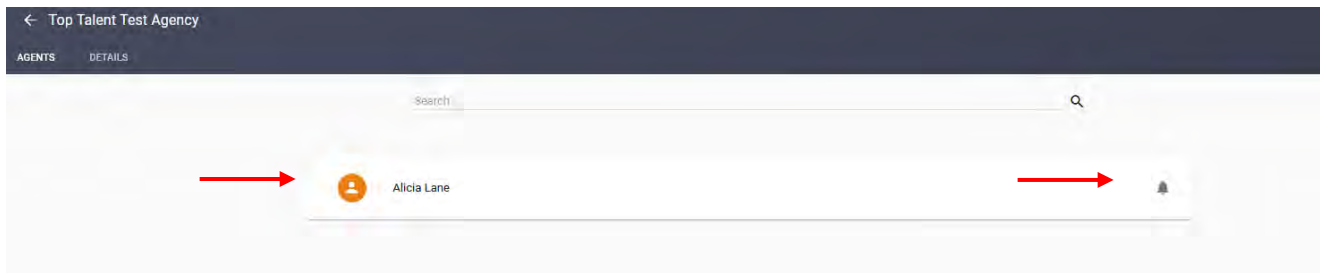
Click the **“Add Agent”** icon in the top right-hand corner:



Complete the Agent's details and add a customised message if required. Then click **“Create Agent”**

A screenshot of a form titled 'Add agent'. The form has a dark blue header with a close button and the title. The form fields are: Title (Ms), First Name (Alicia), Last Name (Lane), Email (alane@sargent.disc.com), Country Code (United Kingdom (44)), and Mobile. Below the fields, there is a section for 'add a message to invitation' with a text input field containing 'Hi, I'd like to invite you to join CrewStart'. At the bottom of the form, there is a blue button labeled 'CREATE AGENT' circled in red.

The Agent will then receive an email inviting them to join CrewStart. An orange icon next to the Agent's name indicates that it is pending. Once the Agent accepts it, it will change to green. Should you need to re-issue the invite, click the bell icon.

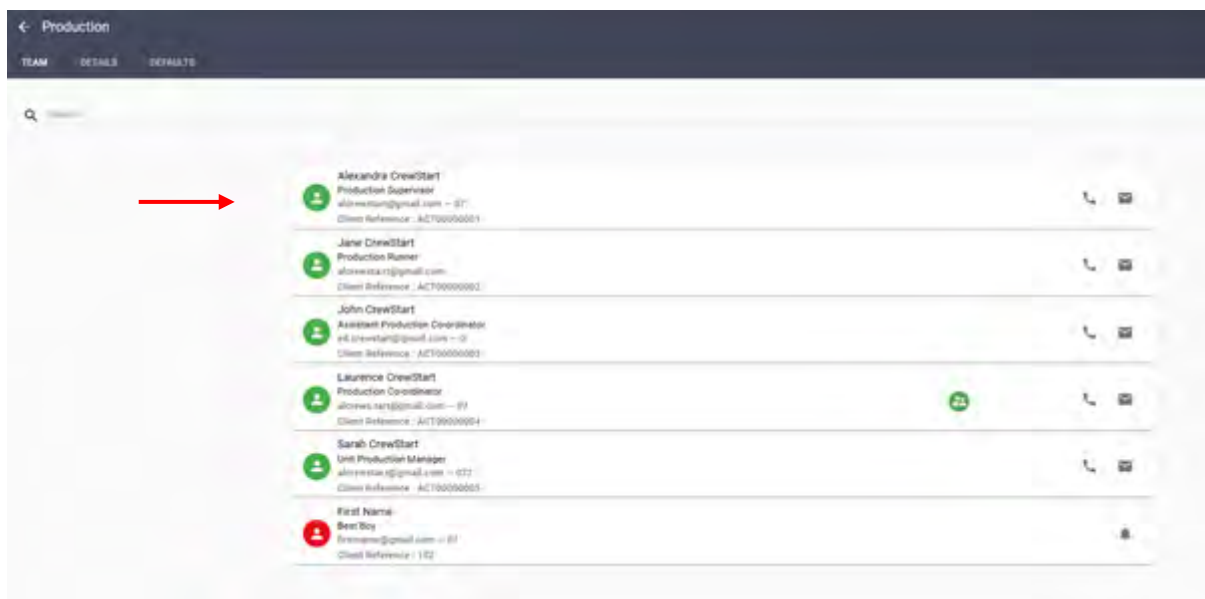
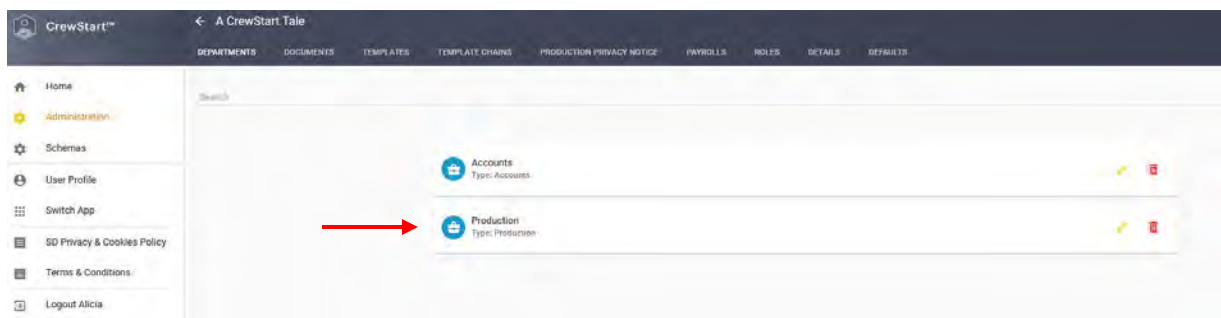


Linking an Agency or Agent to a Crew Member

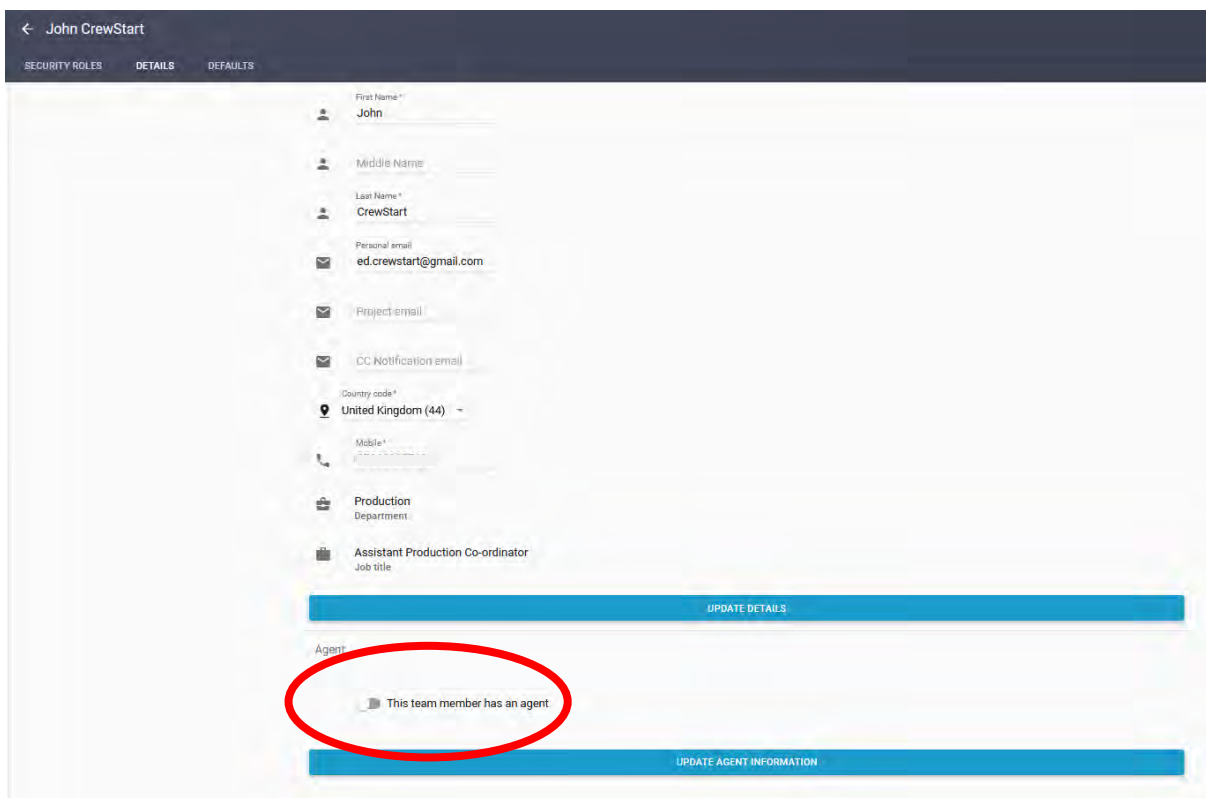
This can only be done by the Project Admin. The Project Admin needs to log into CrewStart and select the Project

Click the **“Project Admin”** cog in the top right-hand corner

Under **“Departments”** > Select the department to which the Crew member belongs. In the example below the Crew member “John” belongs to Production

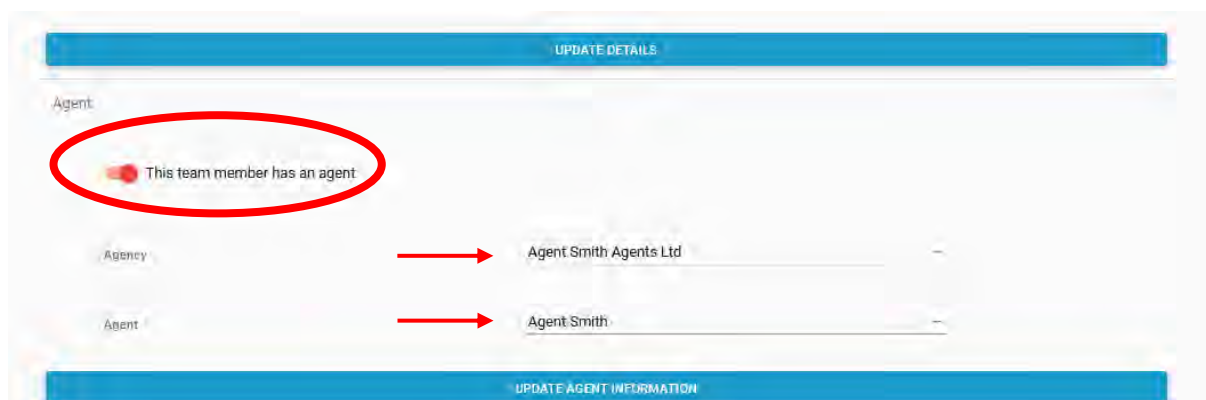


Click on the Crew member's profile and you will be taken to the screen below. Scroll to the bottom and you will see an option for **"This team member has an agent"**.

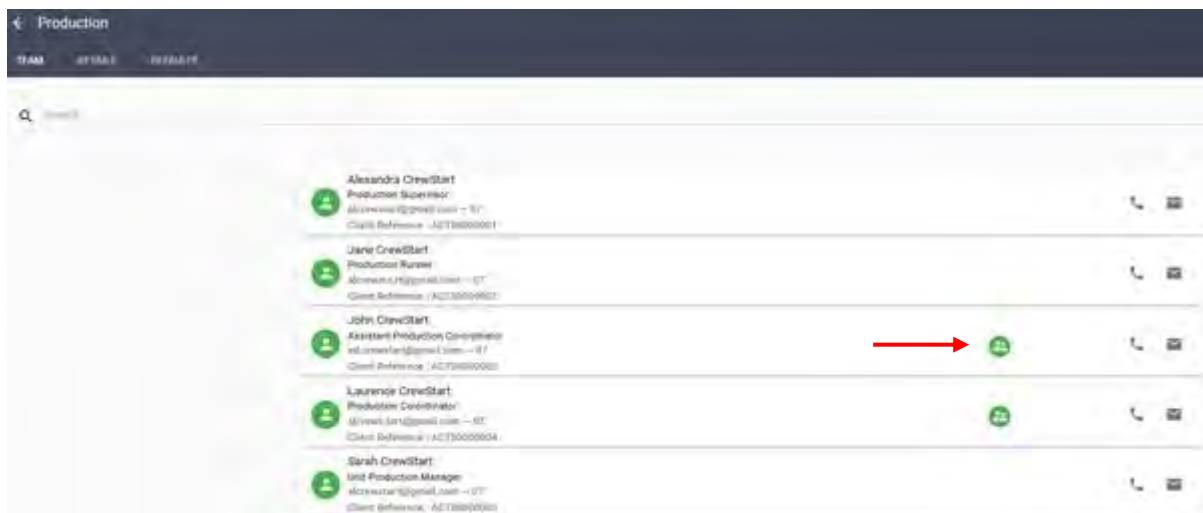


Click the toggle button **"This team member has an agent"** and it will turn red. Then select the **Agency** and **Agent** from the dropdown menus.

Once you have done this, click **"Update Agent Information"** > **"Yes"**

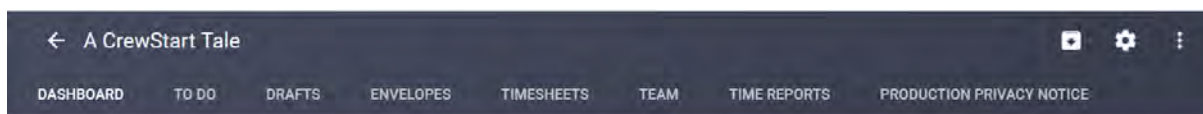


To check that the Agency/Agent has successfully linked to the Crew member, you will see a green agent icon next to the Crew members name as below.



How to Download Approved Envelopes

A Project Admin has the ability to download approved envelopes in bulk. Go to the Dashboard tab > select the download all envelopes icon in the top right > insert a start and end date > select "include attachments" if required.



NOTE: We recommend you only download a month's worth of envelopes per batch (rather than the whole production in one go) due to the size of the files.

The screenshot shows a dialog box titled 'Export of approved envelopes'. It contains the following fields and options:

- Starting Date:** A date picker field with a red 'required' label below it.
- End Date:** A date picker field with a red 'required' label below it.
- Select a department:** A dropdown menu currently showing 'All Departments'.
- Include Attachments ?** A checkbox that is currently unchecked.
- EXPORT APPROVED ENVELOPES** A button at the bottom right.