SCHEDULESOURCE

**ScheduleSource TeamWork
Enterprise Portal Guides
Part II Additional Modules
Credentials Module**

Version 1.0

Table of Contents

Chapter 1 – Introduction to Credentials

Overview

Use the Credentials module to establish, monitor, and enforce qualifications, related training, and certifications required for employees to work at a station. Once you enter required credentials, i.e., qualifications, training, and certifications, you can identify prerequisites and deploy the credential to a station. Then, you can assign them to individual employees. TeamWork uses credential information to assign employees to shifts. Only those employees who possess required skills and credentials are automatically assigned to shifts at that station.

When the Credentials module is enabled, a link to the Credentials section displays on the top menu of the Enterprise portal. Credential information displays in the Location portal in Employee information and in the Employee portal in Profile information.

This module allows you to:

- Establish a qualification, training class, or certification and require it for a station.

- Assign the qualification, training class, or certification to employees who possess the appropriate qualification, training, and certification.

- Require credentials at a station.

- Select Credentials on the right pane toolbar to display a table listing all credentials. Select a credential and edit it, add a prerequisite, add it as a requirement for a station, or assign it to an employee.

- Track the status of the qualification, training class, or certification and monitor effective dates.

- Maintain record information for each type of qualification, training, and certification.

- Import and export credential information from and to external sources.

- Set enforcement levels and effective schedule range checks on a location-by-location basis.

- Run schedules in the Location portal using Auto Fill. If credentials are required, only employees who possess the required credentials are automatically assigned to shifts.

- Clear non-compliant shifts using the tool provided.

- Report on employee compliance. Filter by location, and list employee compliance information or expired credentials, expiring credentials, and non-compliant shifts for one location or all locations.

Note: When you designate qualifications, training, or certifications as required at a station, TeamWork does not assign employees to a shift if they do not possess the mandatory credentials. However, a Scheduler with role permissions can override the Auto Fill schedule and manually assign an employee to any shift.
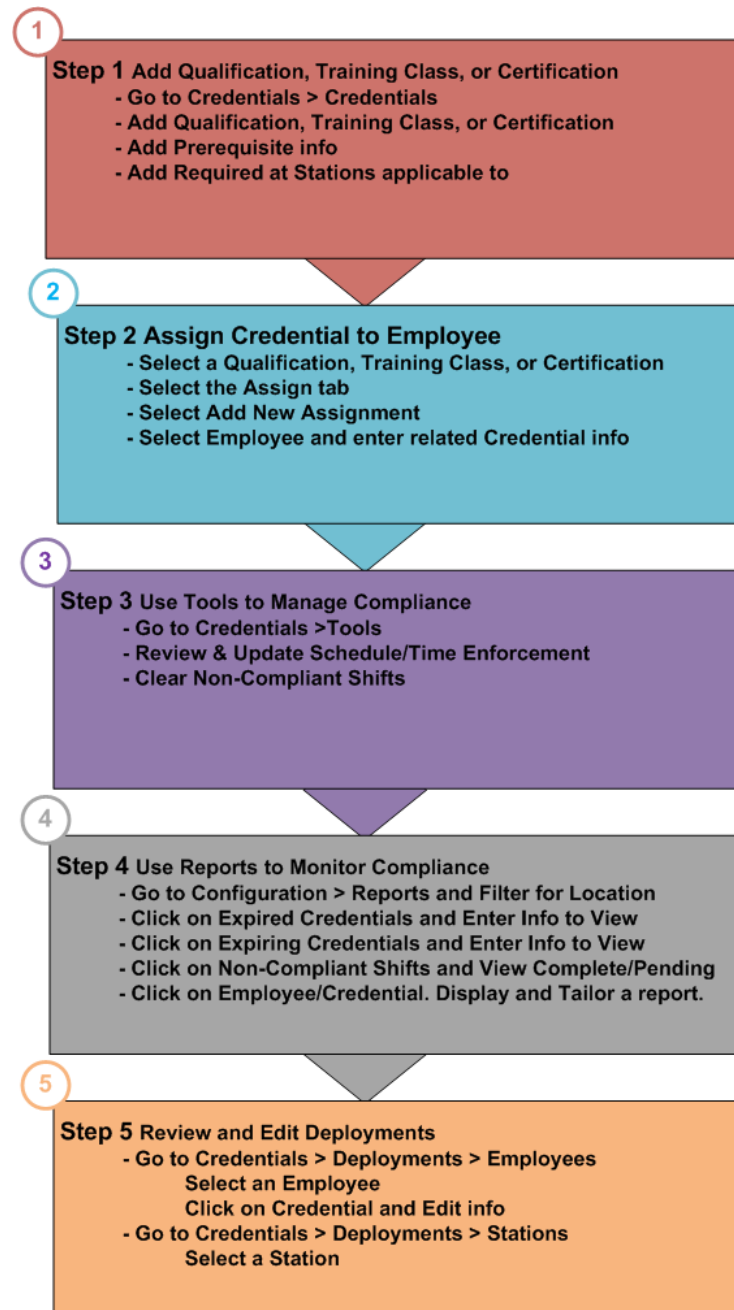
Credentials Workflow

The Credentials module allows you to establish criteria to ensure that employees assigned to shifts posses the required qualifications, training, and/or certifications for working at a station. You can set credentials on a station-by-station basis, and enforce compliance on a location-to-location basis for the current date or schedule dates. Once you establish credentials, TeamWork uses those requirements when it schedules employees to work shifts.

Workflow Steps

The following workflow shows steps for setting up and using the Credentials module.

1

Step 1 Add Qualification, Training Class, or Certification
- Go to Credentials > Credentials
- Add Qualification, Training Class, or Certification
- Add Prerequisite info
- Add Required at Stations applicable to

2

Step 2 Assign Credential to Employee
- Select a Qualification, Training Class, or Certification
- Select the Assign tab
- Select Add New Assignment
- Select Employee and enter related Credential info

3

Step 3 Use Tools to Manage Compliance
- Go to Credentials >Tools
- Review & Update Schedule/Time Enforcement
- Clear Non-Compliant Shifts

4

Step 4 Use Reports to Monitor Compliance
- Go to Configuration > Reports and Filter for Location
- Click on Expired Credentials and Enter Info to View
- Click on Expiring Credentials and Enter Info to View
- Click on Non-Compliant Shifts and View Complete/Pending
- Click on Employee/Credential. Display and Tailor a report.

5

Step 5 Review and Edit Deployments
- Go to Credentials > Deployments > Employees
   Select an Employee
   Click on Credential and Edit info
- Go to Credentials > Deployments > Stations
   Select a Station

See Also

- [How To's for Setting Up Credentials](#)
- [How To's for Using Credentials Tools](#)
- [How To's for Running Credentials Reports](#)
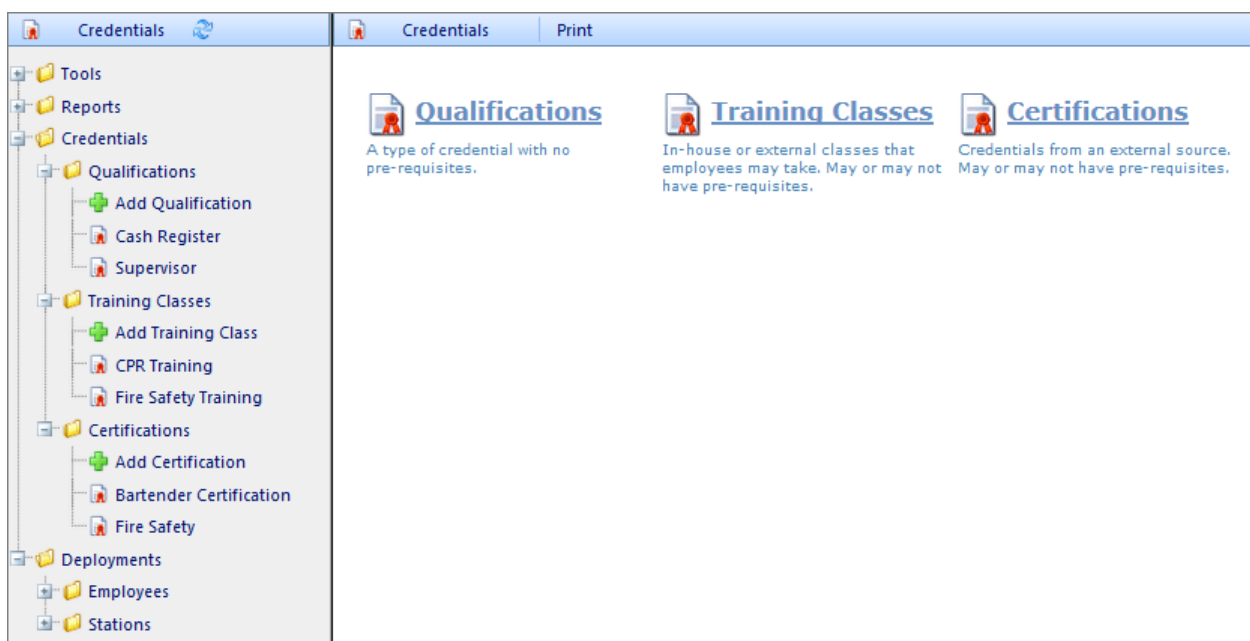- [How To's for Using Deployments](#)

Chapter 2 – Understanding Credentials

Use the Credentials module to add qualifications, training classes, and certifications. Assign them to employees and stations. Deploy to employees who possess the required qualifications, training classes, and certifications; edit related credential information, and track ongoing compliance. Use tools to set enforcement levels for each location and check an effective date range. Clear non-compliant shifts.

The following shows the Credentials module windows.

Launch Credentials

See the following Credentials folders:

- Tools
- Reports
- Credentials
- Deployments

Tools

There are three Tools selections:

- Import/Export
- Enforcement Settings
- Clear Non-Compliant Shifts

For more information, see How To's for Using Credentials.

Import/Export

Enforcement Settings

Clear Non-Compliant Shifts

Reports

There are four Reports selections. In addition, you can filter reports by location to hone in on specific information.

Note: If you filter on a location, all the subsequent report selections provide results for that specific location until you remove the filtering.

Reports include:

- Filter on Location
- Expired Credentials
- Expiring Credentials
- Non-Compliant Shifts
- Employee/Credential

For more information, see How To's for Running Reports.

Filter on Location

Expired Credentials

Expiring Credentials

Non-Compliant Shifts

Employee/Credential

Credentials

There are three Credentials folders. Use them to establish qualifications, training classes, and certifications. Add a credential, identify prerequisites and stations it is required at, and assign it to one or more employee.

Credentials include:

- Qualifications

- Training Classes

- Certifications

For more information, see How To's for Setting Up Credentials and How To's for Using Credentials.
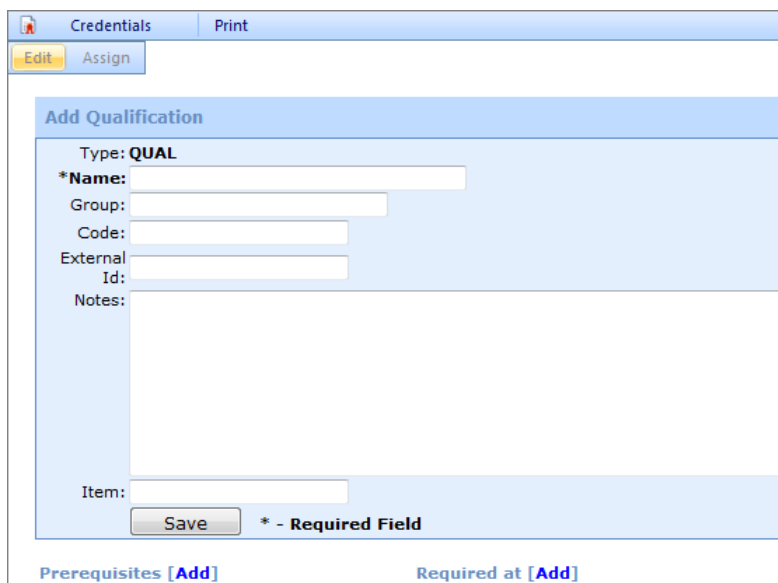
Qualifications

Add Qualification

Add Prerequisite

Add Station
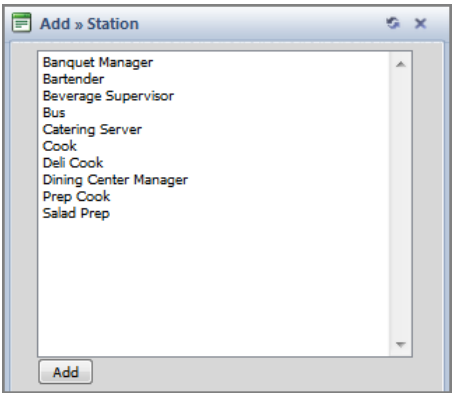
Assign Qualification

| Credentials | \ Cash Register | Print | | | | | |

Edit **Assign**

Assignments: Cash Register
[Add New Assignment]

Employee	Status	Completed	Effective Start	Effective End	Note	External Id	
Apple, Allison	Complete	1/4/2015	1/4/2015	1/31/2017	Qualification reflects new cash register software training.		Edit
Berry, Barbara	Complete	1/4/2015	1/4/2015	1/31/2017	Qualification reflects new cash register software training.		Edit

Add New Assignment

Add New

Credential: **Cash Register**
*Employee:
- Apple, Allison
- Berry, Barbara
- Cloud, Casey
- Door, Dave
- Evergreen, Erik
- Ferry, Fern

*Status: Pending
Due:
Completed:
Effective: -
External Id:
Authority:
Authority Score:
Authority Coverage:
Authority Issued Id:
Item Id:
Notes:

Save   * - Required Field

Close

Training Classes

| Locations | Stations | Employees | **Credentials** | Forecasts | Templates | Local | Time | Rules | Reports |

| Credentials | | Credentials | Print |

Edit Assign

Training Classes

- Tools
- Reports
- Credentials
  - Qualifications
    - Add Qualification
    - Cash Register
    - Supervisor
  - Training Classes
    - Add Training Class
    - CPR Training
    - Fire Safety Training

Id	Name	Type
CPR123	CPR Training	Training Class
FireSafety_Train	Fire Safety Training	Training Class

Add Training Class

Credentials	Print

| Edit | Assign |

Add Training Class

Type: **CLASS**
*Name:
Group:
Code:
External Id:
Notes:

Item:

Save   * - Required Field

Prerequisites [Add]   Required at [Add]

Remember: You can add prerequisites and require the training class at a station. See Add Prerequisite and Add Station.

Assign Training Class

Credentials	\ Fire Safety Training	Print

| Edit | Assign |

Assignments: Fire Safety Training
[Add New Assignment]

Employee	Status	Completed	Effective Start	Effective End	Note	External Id	
Apple, Allison	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Berry, Barbara	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Cloud, Casey	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Door, Dave	Complete	12/5/2014	12/5/2014	1/31/2017			Edit

Remember: You can also add a new training class assignment for an employee. See Add New Assignment.

Certifications

Add Certification

Remember: You can add prerequisites and require the certification at a station. See Add Prerequisite and Add Station.

Assign Certification

Employee	Status	Completed	Effective Start	Effective End	Note	External Id	
Apple, Allison	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Berry, Barbara	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Cloud, Casey	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Door, Dave	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Evergreen, Erik	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Ferry, Fern	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Hunt, Harold	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Iron, Ivan	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Jump, Joan	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Kent, Kyra	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Luck, Linda	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Pickle, Petra	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Snap, Susan	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Valley, Vera	Complete	12/5/2014	12/5/2014	1/31/2017			Edit
Gate, Gary	Pending	12/5/2014	12/5/2014	1/31/2015	Changed effective date.		Edit
Zabowski, Zach	Pending	12/5/2014	12/5/2014	1/31/2015			Edit

Remember: You can also add a new certification assignment for an employee. See Add New Assignment.

Deployments

Once you have assigned employees a credential or identified a station that requires a credential, they display in the Credentials module as a deployment. Deployments folders include:

- Employees
- Stations

For more information, see How To's for Using Credentials

Employees

Edit Employee Credentials

Stations

Name	Id	Employee	Status	Due	Completed	Effective Range		Note
Fire Safety		Apple, Allison	valid	12/31/14	12/05/14	12/05/14	01/31/17	
Fire Safety		Berry, Barbara	valid	12/31/14	12/05/14	12/05/14	01/31/17	
Fire Safety		Cloud, Casey	valid	12/31/14	12/05/14	12/05/14	01/31/17	
Fire Safety		Door, Dave	valid	12/31/14	12/05/14	12/05/14	01/31/17	
Fire Safety		Evergreen, Erik	valid	12/31/14	12/05/14	12/05/14	01/31/17	
Fire Safety		Ferry, Fern	valid	12/31/14	12/05/14	12/05/14	01/31/17	
Fire Safety		Gate, Gary	pending	12/31/14	12/05/14	12/05/14	01/31/15	Changed effective date.

Employee Credentials » Station

Cook

Chapter 3 – Role Definitions for Credentials

Role definitions for the Credentials module apply to users in the Enterprise portal. In the Location portal, Credential information displays for each employee as view-only. It is important to understand that while Credential records are used in Auto Fill scheduling and can be viewed in the Location portal and Employee portal, they are established and maintained in the Enterprise portal.

Credentials Section Access

Action	Permission description...
View	allows information in the Credentials section to be viewed; no editing
Edit	allows information in the Credentials section to be edited. Includes adding prerequisites and identifying stations where qualification, training class, or certification is required.
Assign	allows assignment of qualification, training class, and certification to employee
Schedule Enforcement Settings	allows editing of schedule and time enforcement information for a location
Clear Non-Compliant Shifts	allows clearing non-compliant shifts

Chapter 4 – How To's for Setting Up Credentials

Overview

Use the Credentials folder to set up, edit, and delete credentials. The steps apply for each type of credential, i.e., Qualifications, Training Classes, and Certifications. See:

- Adding a Credential
  - o Adding a Prerequisite
  - o Adding a Credential as a requirement at Stations
- Assigning a Credential to Employees
  - o Editing an Employee Credential Assignment
  - o Deleting an Employee Credential Assignment
- Editing a Credential
- Deleting a Credential

Refer to the following How To's.

Adding a Credential

Add qualifications, training classes, and certifications as well as related prerequisites. Identify when a qualification, training class, and/or certification is required for employees to be able to work at a station.

To add a credential:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Credentials, select ➕ Add for the type of credential you would like to add: Qualification, Training Class, or Certification.
   Add credential window displays in the right pane. The **Type** of credential displays automatically.

3. On the Add window, type the credential **Name**.

4. Type additional information as is required in your organization for **Group**, **Code**, and **External Id**.
   Note: When you enter a Code, it displays in the Id column in credential summary tables.

5. Type any **Notes** related to this credential.

6. Type an **Item** if desired.

7. Select **Save**.
   Once you have added a credential, you can add a prerequisite and require the prerequisite at one or more stations. See Adding a Prerequisite and Adding a Credential as a Requirement at a Station.

To add a prerequisite:

You can continue working on this credential now, i.e., continue from the previous procedure, or you can come back to this step later.

Note: If you are adding a prerequisite to a Qualification, do so before you save the Qualification since the link is no longer available after you save the information. ***Terry - is this the way it is supposed to work?

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Credentials, select the credential you would like to assign a prerequisite to.

3. Select Prerequisites [**Add**].
   Add Prerequisite window displays. Listed are all the credentials in your organization.

4. Select the prerequisite(s) you would like to add.

5. Select **Add**.
   Prerequisite is added for credential.

To add a credential as a Requirement at a Station:

You can continue adding the credential as a requirement at a station, i.e., continue from the previous procedure, or you can come back to this step later.

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Credentials, select the credential you would like to require at a station.

3. Select Required at [**Add**].
   Add >> Station window displays. Listed are all the stations in your organization.

4. Select the station(s) you would like this credential added to as a requirement. Once added, when you run Auto Fill, employees are not scheduled to work at that station unless they posses the credential, i.e., qualification, training class, or certification.

   Note: While TeamWork Auto Fill does not assign employees to a shift if they do not posses required credentials, a Scheduler with role permissions can manually assign employees to shifts whether or not they posses the required credentials.

5. Select **Add**.
   Requirement is added at the station(s).

Assigning a Credential to Employees

You can assign a credential to one or many employees when you first establish a credential, or you can return to the Edit window and add new employee assignment information at any time.

To assign a credential to one or more employees:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Credentials, select the credential you would like to assign to one or more employees.
   Edit credential window displays in the right pane.

3. Select the **Assign** tab.
   Assignments window displays for the credential selected.

4. Select the link to [Add New Assignment].
   Add New window displays. Credential name displays automatically.

5. Select the employee or employees you would like this credential to be assigned to.

6. Select the **Status**: Pending or Complete.

7. Enter credential date information for **Due**, **Completed**, and **Effective** start and end dates.

8. Enter **External Id** and any other **Authority** and **Item** information.

9. Enter any **Notes** related to this credential. They display on credential summary tables.

10. Select **Save**.

To edit an employee's credential assignment:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Credentials, select the credential you would like to edit.

3. Select the **Assign** tab.
   Assignments window displays for the credential selected.

4. Locate the employee record. Use the filter 🔽 and select search criteria.
   OR
   Scroll down to the employee name whose credential assignment needs editing.

5. Select **Edit** in the right column.
   Employee name is highlighted and fields display in editable text boxes.

6. Make desired changes and select **Save**.
   Assignments window refreshes and displays the changes you made.

To delete an employee's credential assignment:

1. Select the **Credentials** link on the top menu.

2. See How To's for Using Deployments. Use the steps for Viewing, Editing, and Deleting Employee Credentials.

Editing a Credential

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Credentials, select the credential you would like to edit.
   Edit credential window displays in the right pane.

3. Make desired changes.

4. Select **Save**.

Deleting a Credential

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Credentials, select the credential you would like to delete.
   Edit credential window displays in the right pane.

3. Select **[Delete]**.
   Window prompts: Delete this credential and ALL RELATED INFORMATION?

4. Select **OK**.
   The Credential and all related information are deleted and cannot be retrieved.

Chapter 5 –How To's for Using Credentials

Use the Credentials tab and the Tools folder to access credentials information. Each is described as follows.

Credentials tab

The Credentials tab on the right pane toolbar displays a summary of all credentials and related information established in your organization. It also allows you to hone in on the details of one credential type. From this display, you can view, edit, and assign credentials.

Tools

The Tools folder gives you the ability to import/export credentials to and from other programs, enforce schedule and time settings, and clear non-compliant shifts that are either complete-only or pending or complete.

Selections include:

- Importing or Exporting Credentials — Use this tool to view, edit, and assign qualifications, training classes, and certifications. Import/Export information to or from external systems.

- Enforcing Settings — Use this tool to set, edit, or view the enforcement level and effective ranges of credentials at each location. Enforcement level is either None or Complete Only. Effective Range Check is either Schedule Dates or Now (current date).

- Clearing Non-Compliant Shifts — Use this tool to clear non-compliant shifts. ***Terry - I need help with this. I cannot make a shift non-complaint, so I don't know how to clear a shift that is non-compliant.

Refer to the following How To's.

Displaying and Updating Credentials

You can display a summary of all credentials or one credential type from any window in this module by selecting the Credentials tab.

To view, edit, and assign credentials:

1. Select the **Credentials** link on the top menu.

2. To view all credentials, select the Credentials tab on the right pane toolbar.
   OR
   To view a type of credential, select the Credentials tab and highlight which of the credentials you would like to view: Qualifications, Training Classes, or Certifications.
   A table listing All Credentials or specific Qualifications, Training Classes, or Certifications displays, based on your selection.

3. Select the **Name** of the credential. When you hover over it, a link is active.

4. Select **Edit** to make changes to the credential, including to Prerequisites and station Requirements, and **Save**.

5. Select **Assign** to make changes to the credential assignment, including adding a new assignment.

Importing or Exporting Credentials

To import or export credentials:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Tools, select **Import/Export**.

   ***Terry - I don't see how importing or exporting works. Can you help me figure this out?

Enforcing Settings

To add or edit enforcement settings:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Tools, select **Enforcement Settings**.
   Schedule/Time Enforcement window displays.

3. Add or edit an **Enforcement Level** using the drop-down list. Options are None or Complete Only.

4. Add or edit an **Effective Range Check** using the drop-down list. Options are: Now (current date) or Schedule Dates.

5. Select **Save**.

Clearing Non-Compliant Shifts

To clear non-compliant shifts:

1. Select the Credentials link on the top menu.

2. On the left navigation under Tools, select **Clear Non-Compliant Shifts**.
   Clear Non-Compliant Shifts window displays.

   ***Terry - I don't see how to get a non-compliant shift in this area so I can clear it. Bill was pretty busy while you and Scott were gone, and I didn't want to bother him. When you get a break, maybe we can figure this out.

Chapter 6 –How To's for Running Credentials Reports

Use the Reports folder to display summary credential data for your organization. You can:

- Filter on one location or include data from all locations. See Filtering Reports by Location.

- Use pre-designed reports for expired and expiring credentials as well as non-compliant shifts. See Running Expired Credentials Reports, Running Expiring Credentials Reports, and Running Non-Compliant Shift Reports.

- Design ad-hoc reports using Employee fields and Credential fields. See Designing Employee Credential Reports.
  Note: To understand more about designing reports, refer to Reports module documentation and references. See the Reports Section Overview and Employee Credentials Data Sources.

Remember: You can print reports using the Print tab on the right pane toolbar. This uses your print settings to prints the contents of your window.

Refer to the following How To's.

Filtering Reports by Location

Use the Filter drop-down list to select a specific location or to remove a location you previously selected.

Important: Once you select a location, all reports access data from only that location until the filter is removed.

To add a Location filter:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Reports, select **Filter**.
   Location drop-down window displays selection.
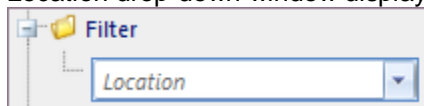
3. Select the location from the drop-down list.
   Reports display data for only the selected location.
   Note: All other Credential Reports windows display the following: **FILTER: Default Deployment=**<location selected>

To remove a Location filter:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Reports, go to **Filter**.
   Location drop-down window displays selection.

3. Highlight the selected location and press Delete.

   Location window displays a list of all locations. Filter message is removed from the top of reports.

Running Expired Credentials Reports

Display a list of employees whose credentials have expired. Information incudes employee name, credential, Id, completed date, effective start date, and effective from and to dates. Type information in the text box provided and use a filter ⌄ to access specific data.

To display an Expired Credentials report:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Reports, go to **Expired Credentials**.
    Expired Credentials window displays. Included are all employees who have expired credentials: Qualifications, Training Classes, and Certifications.

3. To locate a specific employee or credential information, use the filter ⌄ and select search criteria.
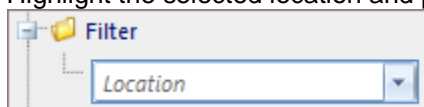   Expired Credential information displays.

Running Expiring Credentials Reports

Display a list of employees whose credentials are going to expire. Information incudes employee name, credential, Id, completed date, effective start date, and effective from and to dates. Quickly locate a specific set of records using the filter ⌄.

To display an Expiring Credentials report:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Reports, go to **Expiring Credentials**.
    Expiring Credentials window displays.

3. Enter the date range you would like to view and select enter.
    Expiring Credentials window displays with a list of the employees who will have expiring credentials during the date range you specified. Included are all types of credentials: Qualifications, Training Classes, and Certifications.

4. To locate a specific employee or credential information, use the filter ⌄ and select search criteria.
    Expiring Credential information displays.

Running Non-Compliant Shifts Reports

Display a list of non-compliant reports. Information includes employee name, location, and a count.

To display a Non-Compliant Shifts report:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Reports, go to **Non-Compliant Shifts**.
    Non-Compliant Shifts window displays.

3. Select whether you require Complete Only or Pending and Complete certification.
    List of Non-Compliant Employees assigned to locations displays.
    ***Terry - I'm not able to get a shift to display in this window even if I make an employee non-compliant for a location's requirements.

Designing Employee/Credential Reports

Use Employee/Credential reports to design reports that use employee and credential fields as data sources. See Employee Credentials Data Sources for a list of data sources and their field definitions. Once you have designed reports, you can select them and quickly display results.

To design an Employee/Credential report:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Reports, go to **Employee/Credential**.
   Designs window displays.

3. Type the name of a report you want to design and select **Add**.

4. Under **Employee**, select **Add**.
   Employee Fields window displays.

5. Select the fields you want listed in the report. Remember, you can select one and then use CTRL + click to select additional fields.

6. Select **Add**.
   Selected fields display under Employee. Fields with a check box selected display in the report.

7. Under **Credential**, select **Add**.
   Credential Fields window displays.

8. Select the fields you want listed in the report. Remember, you can select one and then use CTRL + click to select additional fields.

9. Select **Add**.
   Selected fields display under Credential. Fields with a check box selected display in the report.

10. Select each **Credential** to specify the column contents you want displayed.
    Column window displays.

11. If desired, make changes to the **Title**. The title displays as the column header on the report.

12. Enter the **Formula** for the field. For example: completed=1, status.

13. Select **Save**.

14. Select **View**.
    Report displays at the bottom of the window. Download options include: text (TXT), CSV, and PDF.

Chapter 7 –How To's for Using Deployments

Use the Deployments folder to display summary information to ensure your employees' credentials meet your station and organization requirements. Use Employees and Stations folders for:

- Viewing, Editing, and Deleting Employee Credentials — Use the Employees link under Deployments to display credential information for each employee. You can view all credential assignments, edit each assignment, and delete a credential assignment for the selected employee.
- Reviewing Credential Assignment Information at Stations — Use the Stations link under Deployments to display credential assignment information at a station.

Refer to the following How To's.

Viewing, Editing, and Deleting Employee Credentials

To view, edit, and delete employee credentials:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Deployments, select **Employees**.
   List of employees displays.

3. Select an employee name.
   Employee Credentials window displays.

4. To view credential information for that employee, select the credential name.
   Edit window displays.

5. To edit credential information for that employee, make desired changes on the Edit window, scroll down, and select **Save**.

6. To delete credential information for that employee, scroll down on the Edit window, and select [DELETE].
   Window displays prompt: Delete this Credential assignment?

7. Select **OK**.
   The credential information is no longer assigned to that employee.

Reviewing Credential Assignment Information at Stations

To review credential assignment information at Stations:

1. Select the **Credentials** link on the top menu.

2. On the left navigation under Deployments, select **Stations**.

3. Select a station name.
   Employee Credentials >> Station window displays a list of credential names, Id, Employees who are assigned the credential, status, and related date information. If notes are entered, they also display.

   Remember: To display summary information for one type of credential, go to the Credentials tab on the right pane toolbar and select the credential type you would like to display: Qualifications, Training Classes, or Certifications. Or, go to the specific credential under Credentials and select the credential name. Then, you can display specific information using either the Edit or Assign tab.

References

Employee Credentials Data Sources

You can keep track of employee credentials, qualifications, certifications, and training classes as they relate to stations and shift assignments. Designate locations that require enforcement of credentials and identify non-compliant shifts. Run reports on a periodic basis that list expired credentials, credentials that will expire in the near future, and shifts that highlight employees who are non-compliant. See the following:

- Credentials are established in the Enterprise portal. Go to the Credentials section of TeamWork to add and edit credentials. While you assign credentials to employees in the Enterprise portal, a scheduler with role permissions can view credentials in the Location portal and Employees can view their credentials in the Employee portal.

- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations.

- Employee contact and scheduling information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees. In many organizations, employees maintain their personal and contact information in the Employee portal.

    Note: Credentials such as qualifications and certifications are assigned to specific employees. When you run reports to view Employee Credentials, only the employees who have those qualifications and certifications assigned to them are listed.

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's street address. (*Entered in Address in the Employee Information window.*)
Address2	Additional information for employee address. (*Entered in Address2 in the Employee Information window.*)
BioId	Employee's BioId. (*Entered in BioID in the Employee Information window.*)
BirthDate	Employee's birthdate. (*Entered in Birth Date in the Employee Information window.*)
CardId	Employee's CardId *(Entered in BadgeID in the Employee Information window.*)
City	City of the employee address. (*Entered in City in Employee Information window.*)
Country	Country of the employee address. (*Entered in Country in Employee*

	Information window.)
DefaultLocation	Indicates the location chosen as an employee's the primary work location in the Enterprise portal. To edit the DefaultLocation, go to Employees > Location and click on a Location in the list of locations for that employee. On the Locations Settings window that displays, select Yes or No for Default.
DefaultLocationExternalId	The External ID of the DefaultLocation. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates with an external system.
DefaultLocationId	Unique ID of the default location set by ScheduleSource.
Email	Email of the employee. (*Entered in Email in Employee Information window.*)
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee first name. (*Entered in First Name in Employee Information window.*)
FullName	Employee full name. Displayed as "Last, First".
HireDate	Employee Start Date.
IVRPinCode	Employee's Pin number issued for clocking via a telephone. (*Entered in IVR Pin in Employee Information window.*)
LastName	Employee's last name. (*Entered in Last Name in Employee Information window.*)
MaxDays	Maximum number of working days per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxDays.
MaxHours	Maximum number of hours per week this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHours.
MaxHoursPerDay	Maximum number of hours per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxHoursPerDay.
MaxShiftsPerDay	Maximum number of shifts per day this employee can be assigned to work. The Automatic scheduling system honors this setting and does not assign an employee to a shift that exceeds MaxShiftsPerDay.
MinHours	Minimum number of hours per week for this employee. Used only for reports and analysis.
Notes	Textual notes related to the Employee. (*Entered on Employee Information window.*)

OrgEmployeeId	Unique ID set by ScheduleSource.
PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. (*Entered in Ph2 (cell) in Employee Information window.*)
PhoneNo3	Additional employee phone number (*Entered in Ph3 (other) in Employee Information window.*)
PostalCode	Employee's zip code or postal code.
QualificationCode	Code associated with this qualification or certification. (*Entered in Name in the Qualification or Certification window.*)
QualificationCompletedBy	Date employee qualification must be completed by for an employee. (*Entered in the Assignments Credential window.*)
QualificationCompleted	Date employee completed the qualification or certification. (*Entered in the Assignments Credential window.*)
QualificationEffectiveEnd	Last date qualification is effective for an employee. (*Entered in the Assignments Credential window.*)
QualificationEffectiveStart	Date qualification begins being effective for an employee. (*Entered in the Assignments Credential window.*)
QualificationEmployeeNote	Notes related to the qualification for an employee. (*Entered in the Assignments Credential window.*)
QualificationId	ID for the employee's qualification. *(Entered in Id in employee Assignments Credential window.)*
QualificationName	Name associated with this qualification or certification. (*Entered in Name in the Qualification or Certification window.*)
QualificationNote	Notes associated with this qualification or certification. *(Entered in Notes in the Qualification or Certification window.)*
QualificationStatus	Indicates qualification status: Complete = valid and Pending = pending
QualificationType	Set by ScheduleSource to distinguish qualification type: QUAL = Qualification, CLASS = Training, CERT = Certification
Rank	Rank of the employee versus other employees. Used in seniority considerations. (*Rank of the employee set in the Employee Information window in the Location portal under the Scheduling tab. To view the rank for an employee in the Location portal, select an employee and go to Edit Employee > Scheduling. In the Enterprise portal, go to Employees > Employees. Click the Scheduling tab. Rank displays in the table.*)

State	Employee's state (from Address settings).
TermDate	Termination or Inactive date of employee. (*Entered in Inactive Date in Employee Status window.*)
TimeZoneOffset	The hour difference between UTC time and the time zone setting for the employee. (*Selected under Employee Information > Time & Attendance.*)
TimeZoneUSDay	Indicates daylight savings for time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time.
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Employee. See Custom Fields Folder Overview.
UserName	Employee's username. (*Entered in Username/ID in Employee Information window.*)
Count	A count of the Employee Credentials, grouped by the other fields selected.

Index