ScheduleSource TeamWork Enterprise Portal Guides Part I Core Scheduling Package

Version 1.0

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Enterprise Portal Guides

Introduction

This series of guides helps you learn how to use the Enterprise portal in TeamWork. The Enterprise portal drives TeamWork, and your organization can decide how to best use its features and functions to meet your employee management and scheduling needs. Because TeamWork allows customers to only use those features that are beneficial in their organization, we have separated documentation into several guides. They are:

- **Part I Core Scheduling Package** — includes help for the Enterprise portal sections that are included in the core subscription. The guide that follows documents the Core Scheduling Package and provides information for setting up and using TeamWork. Records entered in the Enterprise portal are also used in the Location portal and Employee portal.
- **Part II Additional Modules** — includes help for additional TeamWork modules that can be purchased to add to the Scheduling Package. These assist with specific organization needs. They include: Time & Attendance, Credentials, Policy Management, Forecasts, Tours, and Recruiting. Another guide will provide documentation for Part II Additional Modules.
- **Part III Custom Modules** — includes a description of custom modules developed for particular customer needs that can be purchased and require custom integration. Another guide will provide documentation for Part III Custom Modules & Services.

The following chapters provide an understanding of the Enterprise portal Core Scheduling Package.

Chapter 1 – Overview of Core Scheduling Package

Use this guide to learn how Core Scheduling in the Enterprise portal works in TeamWork. TeamWork provides you with powerful tools that help you manage your workforce for employees and workstations, schedule employees to work shifts, manage employee leave, and use collaboration features to communicate with employees and users. The Enterprise portal is where you enter the data TeamWork uses.

Once you enter your organization's data in the Enterprise portal, you can use the Location portal to access the data, create schedules, fill them with shifts, and assign employees to work the shifts. If you allow it, employees can also assign themselves to work empty shifts using the Employee portal.

Information in this guide includes:

- **Introduction** — overview of TeamWork and the Enterprise portal. See Overview of TeamWork and Enterprise Portal Workflow. To familiarize yourself with how the Enterprise portal is organized and designed to operate, see Getting Started and Global Functions. To receive additional help, see ScheduleSource Support.
- **Understanding the Enterprise Portal** — description of Enterprise portal sections. Includes menu selections and a description of each window that launches when you click on a menu selection. See Understanding the Enterprise Portal.
- **How To's for Setting Up the Enterprise Portal** — step-by-step procedures for performing tasks in the Enterprise portal. Includes deciding what to include and How To's for setting up your organization data. See Overview of Enterprise Portal How To's.
- **Admin** — description of Admin tools and How To's for using them. Includes managing enterprise settings, system, and usage; adding custom fields; creating lists that define special days, calendars, leave types, time types, and shift changes; and IP address blocking. See Admin Overview.
- **Collaboration** — description of collaboration tools and How To's for using them. Includes creating, sharing, and broadcasting calendar events and messages. Also includes setting notifications creating feedback surveys. See Collaboration Overview.
- **Templates** — description of tools for creating templates with weekly shifts that need to be worked. See Templates Overview.
- **Local** — description of local tools and How To's for using them. Includes a summary of the schedules built in locations, the Swap Board posted shifts for the next 7 days across locations, and the ability to Auto-Fill shifts built in locations. See Local Overview.
- **Reports** — description of reports provided as well as How To's for viewing fixed reports and creating custom reports. Includes using filters, formula, columns, TeamWork data lists, designs, charts, styles, and packages. See Reports Overview.

Overview of TeamWork

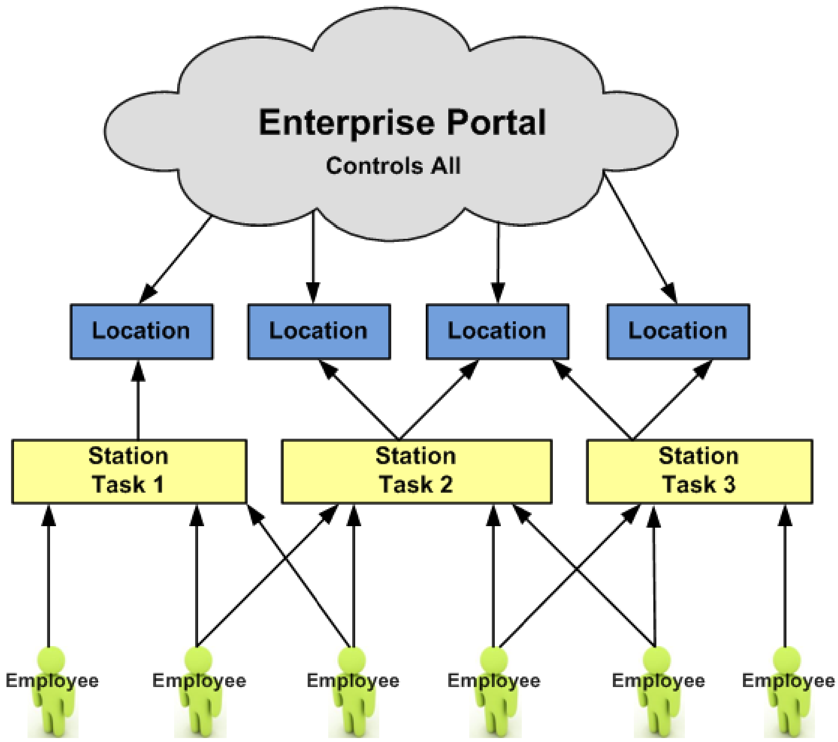
ScheduleSource TeamWork is an application that helps you manage your company workforce. It includes three portals: Enterprise portal, Location portal, and Employee portal. These three portals operate together, maximizing management time and effort while allowing schedulers to ensure shifts are covered in all locations. A brief description of each portal follows:

- **Enterprise Portal** — use it to add and maintain the data that is needed for the structure of your organization and define user access and privileges. Access to the Enterprise portal should be limited to users with system-level administrative responsibility as well as to those who have roles involving administration. Enter all organization locations, employees, stations, users, and roles into the Enterprise portal. Manage multiple physical locations, stations, and employees from one portal. The Enterprise portal can also help you conform with your organization's personnel policies, work procedures, and labor laws.
- **Location Portal** — use it to build templates, shifts, and schedules to manage schedule churn, and communicate with employees. Schedule work in stations and assign employees to these stations. Use auto-fill to optimize filling the shifts in your schedule by enforcing all employee and scheduling parameters entered. Factor in employee availability, availability preferences, and station skills to fill shifts. You can allow employees to swap shifts and/or set up a bid board of shifts.
- **Employee Portal** — use it to allow employees to access only their information. They can always view their own schedule, day off requests, calendar, and message board, and can set email notifications. The organization can also choose other optional features for employee access:

allow employees to self-assign themselves to available shifts, swap and/or bid on shifts, view coworker information, enter availability, and view a full location schedule. Meet your organization's needs while allowing employees to balance work with their personal time requirements.

TeamWork Diagram

The following diagram shows how TeamWork operates. The Enterprise portal provides the umbrella or cloud configuration that houses all locations, the stations where tasks are performed, and the employees who are assigned to perform them.



How it works

All organization data is entered into the Enterprise portal, and it is those records that create the foundation for TeamWork. Schedulers use the Enterprise portal data in the Location portal to develop schedules and ultimately to assign employees to shifts. Then, Employees use the Employee portal to review posted schedules and monitor messages and announcements. They can be allowed optional activities such as trying to claim empty shifts, enter leave requests, and post assigned shifts to the swap board.

Additional TeamWork Functionality

In addition to setting up your locations, stations, and employees, the Enterprise portal provides the following additional functions that contribute to the TeamWork system application. They include:

- **Admin Lists** — Build holiday calendars and special days. Set up reasons that schedulers use to reassign or cancel shifts or that employees use when posting a shift on the swap board.

- **Custom Fields** — Use custom fields to establish your own user-defined data fields to track needed information. Gather additional organizational data for building reports and tracking trends.
- **Collaboration** — Use the collaboration package to post events to an organizational calendar, create and distribute messages and alerts, set up email notifications you want to receive, and build a survey to solicit employee feedback.
- **Reports** — Design reports from Enterprise and Location portals to monitor employee work schedules, attendance, and leave data. View system-wide data for the organization, employees, and schedules. Use Custom Fields to establish user-defined values and gather additional data for building reports.

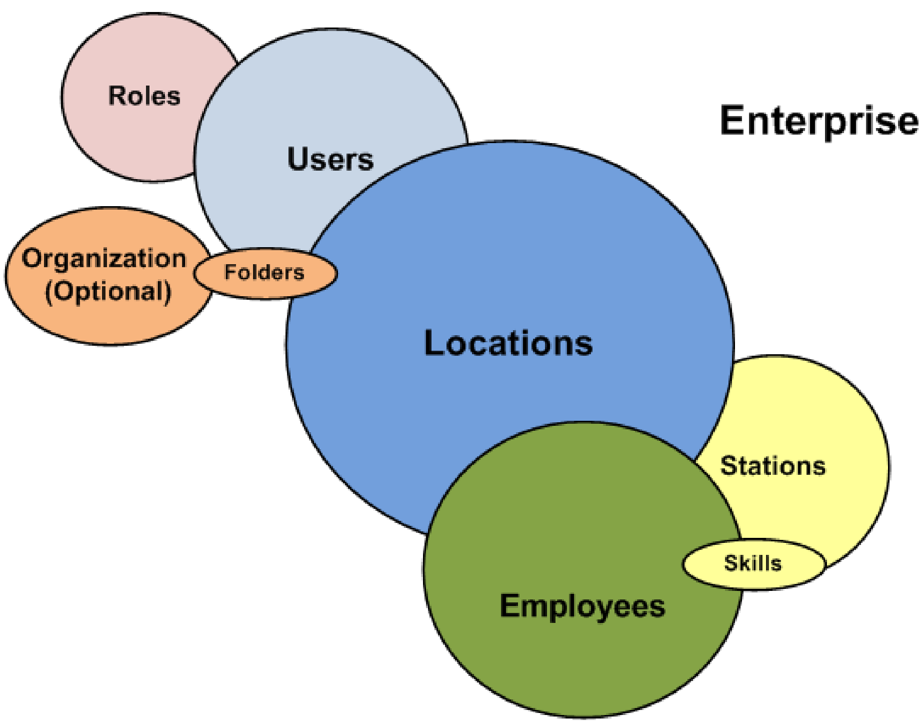
Enterprise Portal Workflow

The Enterprise portal provides centralized management for all locations, employees, stations, and users. Use it to build necessary records, configure the system, and manage your workforce in TeamWork. The workflow involves the following:

- Setting up your organization's locations.
- Entering organization employees and assigning them to locations where they can work.
- Setting up the stations where employees work and assigning these stations to locations.
- Establishing users and granting them access to appropriate locations.
- Setting up role privileges that specify what TeamWork functions can be performed and assigning the correct roles to each user in the Enterprise portal, Location portal, or both portals.

Enterprise Portal Diagram

Refer to the following diagram of the Enterprise Portal.



Suggested Enterprise Portal Workflow

While you can set up records in any order, there are a number of files you need to put in place and use during the setup and implementation process. It may be helpful to refer to Getting Started and TeamWork Global Functions for general instructions as well as Enterprise Portal Help Card # 6 - Section Overview & Terminology.

For How To's that address each of the following workflow steps, refer to How To's for Setting Up the Enterprise Portal.

Workflow Steps

A suggested workflow for data entry in the Enterprise Portal is as follows:

1. Locations – Set Up all Locations

2. Employees – Set Up all Employees

- **Assign Employees to Locations**

3. Stations – Set Up all Stations

- **Assign Stations to Locations**

4. Users – Set Up all Users

- **Assign Users to Locations**

5. Roles – Set Up all Roles

- **Assign Roles to Users**

6. Organization (Optional) – Set Up Folders to Restrict Access

- **Set up a Folder to Subdivide Locations and Employees**
- **Assign Users to one or more Folders**

See Also Additional Enterprise Portal Functionality

The following address questions you may have about additional Enterprise portal functionality. In addition to Understanding the Enterprise Portal and How To's for Setting Up the Enterprise Portal, you also want to review the following sections. They outline the other tasks and How To's you perform in the Enterprise portal.

- What additional Admin tasks should I perform? While there are required setup procedures, there are also optional tasks that you may choose to perform as part of this workflow or at another time. See Admin and Admin Overview.
- When and how should I use Collaboration? See Collaboration and Collaboration Overview.
- How do I use Templates? See Templates and Templates Overview.
- How do Local options help me? See Local and Local Overview.
- How do I run Reports? How can I easily use the data in TeamWork to help me make decisions? See Reports and Reports Overview.

Getting Started

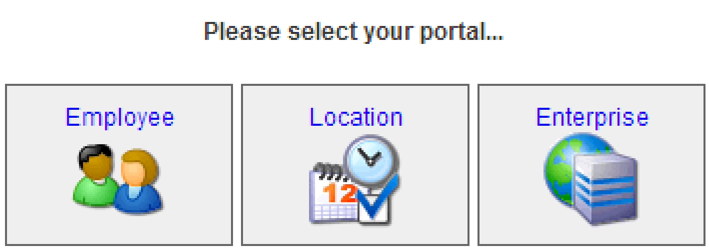
The following provide instructions and guidelines for using the Enterprise portal. See:

- Signing In
- Navigating TeamWork
- Using Shortcuts
- Logging in to Multiple Portals
- Managing Employees
- Security Lockout

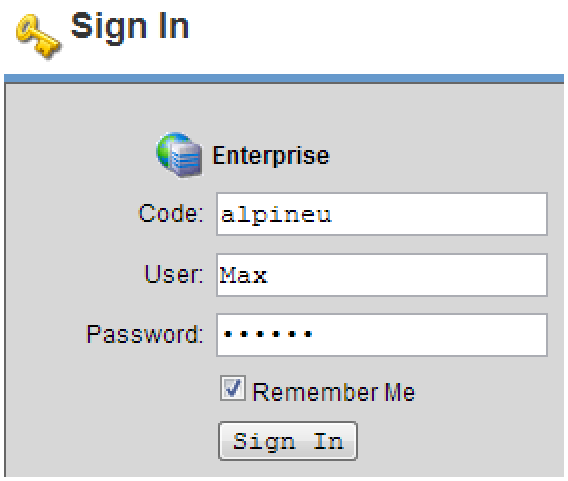
Signing In

Once you have the URL and a login, use these instructions for signing into the Enterprise portal.

1. Enter the URL for TeamWork that your administrator provides you.
   ScheduleSource portal page displays. We recommend creating a bookmark for quick access.

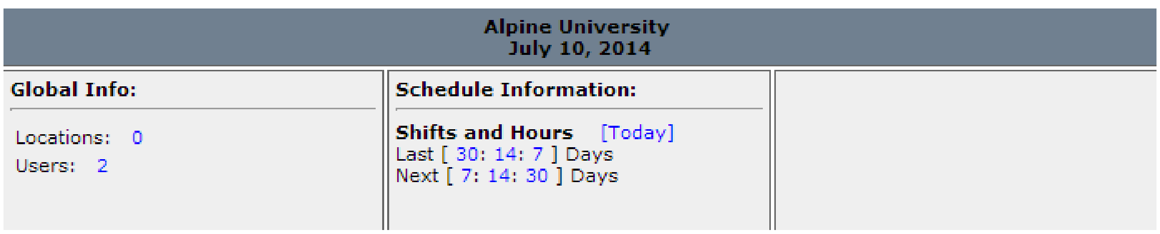


2. Click on **Enterprise**.
   Sign In page displays.



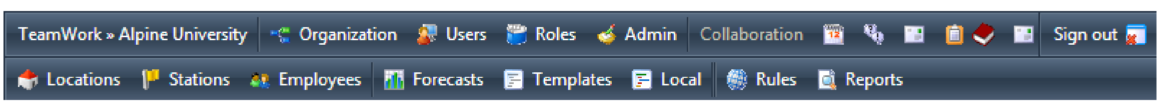
Note: Your administrator provides your Code and User name, as well as your initial password. We recommend changing the initial password to create your own when you first sign in. A strong password is 8 or more characters, containing both letters and numbers, and is not a variation of your User name.

3. Enter your **Code**, **User**, and **Password.**
4. Select the check box to **Remember Me** if you want the computer you are working on to remember your account code and user name. Click **Sign In**. The following Home Page displays.



Note: If you select the check box to Remember Me, you must still enter your password in the future log-ins.

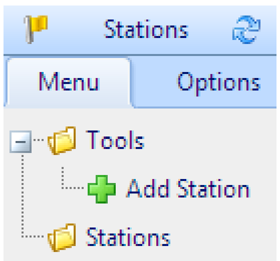
5. To begin working, click on a top menu selection and the section displays.

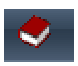


Note: After you select a section, each window displays a left and right pane. A navigation toolbar displays in each pane. The sections that are visible in your account are controlled by your organization and the role you are assigned..

Navigating TeamWork

Each of the sections in the Enterprise portal provides menu selections and available actions. They are described in the following table.

Menu Selection	Description of Actions
Left Navigation - displays for each section  	• Click an item under a Menu folder to display a window in the right pane. TeamWork highlights the link you open, i.e., Add Station. • Click Options to set your Menu display for the way to display your Menu list. • Click Refresh so that data you enter and save in the right pane is visible in lists on the left pane. **Note:** When you add new records, click Refresh so that the list of new records displays in the left navigation pane.
Right Toolbar - displays for each section Includes the same icon and name as displays on the top menu link Stations | Print Additional toolbar selections display below the main section toolbar	Click on a toolbar selection on the right toolbar or open the information that displays in the right pane. • Underlined titles indicate an active link. For example, Stations launches a window. • Dark blue titles may launch a window or provide additional drop-down selections. • Gray titles are the group name and are not active. For example, the following toolbar Settings for: Location Employee Schedule Time indicates that Location, Employee, Schedule, and Time selections all relate to Settings for.
Save button: Save	You must click the **Save** button after entering information. If you do not, your work is NOT SAVED.
Required Field: * - Required Field	Entry is required when the ***Required Field** displays.
Print option on the right toolbar - prints the window that is open in the right pane Print	• Click Print to open your printer screen or print from the Browser (CTRL P). • Use Preview or Browser commands to resize and format a page before printing.

Menu Selection	Description of Actions
Use Filters to Increase Efficiency how they work	• Options tabs - use Option tab filters to display part of the data more quickly • Reports - Create and Save custom filters to quickly view frequently used data subsets • Last name search box filters - Use first part of last name. Enter **% symbol** to return all items in the list.
Warning Alerts and Confirmation	Pay attention to pop-up warning alerts and confirmation messages. Understand all lost-data implications before taking action. While it may be possible to recover data, there is a cost associated with any such action.
Returning to Home screen Organization name in top menu TeamWork »	• Click your organization name in the left corner of the top menu to return to your Home page. • Click F5 to return you to your Home page and pull in the newest data from the server.
Open Learning Center icon on the top menu 	Click the icon to open the TeamWork Learning Center. A new browser window displays. You can also access this at: http://www.Schedulesource.net/support
Open New Support Case icon on the top menu 	Click the icon to display a window for entering a support case. A new window displays for you to enter support case information.
Sign Out icon on the top menu Sign out	Click the Sign out icon to sign out of the Enterprise portal. Always use Sign out to end your session. Do not just close the browser.

Using Shortcuts

The Enterprise portal allows the use of common computer-related shortcuts that are available in many applications.

- **Select multiple items in a list** — click on the first item, hold down the Shift Key, and click on the last item. This selects all items in between.
- **Select separate items in a list** — click on the first item, hold down the CTRL Key while individually clicking on other items you want to select. This selects only the items you individually click on.
- **Drag and drop data** — drag and drop data from an Excel spreadsheet into a TeamWork field entry text box.
- **Copy and paste data** — copy and paste data from any document or window into a TeamWork field entry text box.

Logging in to Multiple Portals

TeamWork allows you log in to multiple portals simultaneously. However, you must use a different browser type for each portal. For example, you might use Chrome for the Enterprise portal, FireFox for the Location portal, and Internet Explorer for the Employee portal.

Managing Employees

You establish employee initial records in TeamWork using the Enterprise portal. See Adding and Managing Employees. Once in the system, you can allow additions and changes to most employee data in the Location portal. However, there are two actions you can take that change employee status system-wide and they must be performed from the Enterprise portal.

- **Delete** - when you delete an employee from the Enterprise portal, they are deleted from every location. All data on the employee is lost and cannot be retrieved.
  Note: An employee cannot be deleted if it contains active (non-archived) shifts or time data at any location.
- **Inactive** - when you make an employee inactive from the Enterprise portal, the employee is inactive in every location. You are not charged for these employees, but can keep all their data. You can re-activate them at any time.

Note: If you delete or make an employee inactive from one location in the Location portal, it affects the employee's status only in that one location. The employee remains active in the Enterprise portal and any other locations the employee is assigned to.

Security Lockout

The Security function under Admin in the Enterprise portal allows you to view and manage the Lockout List. For more information, see Security Overview.

ScheduleSource Support

ScheduleSource support includes email and phone customer support and the TeamWork Learning Center help site. Each is described in the following paragraphs.

ScheduleSource Customer Support

ScheduleSource is committed to providing you support where and when you need it.

- You can ask questions of support personnel using the direct email form linked at the top menu bar in the Enterprise portal. See Opening a New Support Case.
- You also can review documents and tutorials on your own. See Using the TeamWork Learning Center. This is a customer support website that contains a collection of helpful resources.

Opening a New Support Case

The support icon displays on the right of the top menu bar. When you select it, a New Case Support window displays. By submitting questions through this window, ScheduleSource Support automatically verifies you as an authorized user. The Question (How do I) displays as default.

To use the New Support Case window:

1. Click the support icon .
   New Support Case window displays.
2. On the New Support Case window, select Section or leave the default as Other.
3. From the drop-down list, choose Question, Suggestion, or Issue.
4. Enter the details of your case or question.
5. Your email address is automatically populated from the email entered for you as a user.
6. Click **Submit Case.**

Using the TeamWork Learning Center

To access the TeamWork Learning Center, go to: http://www.schedulesource.net/support/. Included are the following resources.

Help Documents

Help documents address portal-specific information. They are PDF files that include definitions and setup procedures as well as help cards for specific step-by-step procedures relating to top menu selections. They include:

- Enterprise Portal — Help cards for tasks performed in the Enterprise portal
- Location Portal — Help cards for tasks performed in the Location portal
- Enterprise & Location Reports — field definitions, data sources and fields, column formula quick reference, and report design examples
- Release Notes — sorted by newest releases
- Tutorials — audio-visual demonstration of tasks

Tutorials

Tutorials are divided into portal-related groups. Under each portal, contents list top menu selections in that portal and a number of audio-visual demonstrations created to support it. When you click on a topic, a list of the individual tutorials displays. Each tutorial shows you the steps you can perform under this menu section. Tutorials include demonstrations for:

- Enterprise Portal
- Location Portal

Chapter 2 - Understanding the Enterprise Portal

There are several areas in the Enterprise portal that are important for you to understand. They are:

- Enterprise Portal Role Definitions
- Menu Selections and Windows

Refer to the following paragraphs for a description of each area.

Enterprise Portal Role Definitions for Part I Core Scheduling Package

The following Role settings apply to giving users access privileges to the Enterprise portal. There are fourteen role sections that contain role actions and related privilege permissions. When you select an action check box, you enable a role permission.

Note: If your organization uses additional modules, those modules may include additional role definitions that are not addressed in the following tables. See Overview of Part II Additional Modules. Role definitions are provided under each module. Or, go to the TeamWork Learning Center Help Documents for the Enterprise Portal. Included are Optional Modules and Role Definitions for the Time & Attendance Module.

Refer to the following actions and permission descriptions for Enterprise portal roles included in the Part I Core Scheduling Package.

Admin Section Access

Action	Permission description...
View	allows viewing of the Admin section data – no editing. See Admin Overview.
Information	allows editing the data on the Information link. See Settings.
Configuration	allows editing the information on the Configuration link. See System.
Usage	allows viewing the Usage link information. See Usage.
Enterprise Custom Fields	can add, edit and delete all the Custom Fields and the Lists for Employee Agreements and Employee Positions. See Custom Fields Overview.

Action	Permission description...
Location Custom Fields	can add, edit and delete the Location Custom Fields data. See Custom Fields Overview.
User Custom Fields	can add, edit and delete the User Custom Fields data. See Custom Fields Overview.
Employee Custom Fields	can add, edit and delete the Employee Custom Fields data. See Custom Fields Overview.
Station Custom Fields	can add, edit and delete the Station Custom Fields data. See Custom Fields Overview.
Shift Swap Reasons	can add, edit and delete the Shift Swap Reasons. See Shift and Time Reasons.
Shift Reassign Reasons	can add, edit and delete the Shift Reassign Reasons. See Shift and Time Reasons.
Shift Cancel Reasons	can add, edit and delete the Shift Cancel Reasons. See Shift and Time Reasons.
IP Address Blocking	can unblock the IP Address Blocking caused by logon failures. See IP Address Blocking.
Leave Types	can add, edit and delete Leave Types used in the Days Off requests See Leave Types.
Special Day Types	can add, edit and delete the Special Day Types. See Special Day Types.
Special Days	can add, delete and assign as a blackout day the Special Day. See Special Days.
Accounting Ids	can add, edit and delete Accounting ids used with web services. See Accounting Id's.

Collaboration Section Access

Action	Permission description...
View	allows viewing of the Collaboration section data – no editing. See Collaboration Overview.
Event Administrator	allows the addition, editing, sharing and deletion of events on the calendar. See Creating Events.
Message Administrator	allows the addition, editing, sharing and deletion of messages. See Creating Messages and Alerts.

Action	Permission description...
Notification Administrator	allows the addition, editing, sharing and deletion of notification settings. See Creating Notifications.
Feedback Administrator	allows the addition, editing, sharing and deletion of feedback surveys. See Creating Feedback and Using Surveys.

Employees Section Access

Action	Permission description...
View	allows viewing the information in the Employee section – no editing. See Adding and Managing Employees.
Add	allows adding employees to the organization. See Adding and Managing Employees.
Edit	allows editing the employee information. See Adding and Managing Employees.
Delete	allows deleting employees from the organization. See Adding and Managing Employees.
Inactive	allows inactivating or reactivating employees in the organization. See Adding and Managing Employees.
Change Password	allows changing the employee's password. See Passwords.
Assign to Folders	allows employees to be assigned to folders in the Organization section. See Adding and Managing Organization Folders.
Deploy to Locations	allows employees to be deployed or assigned to Locations. See Adding and Managing Locations
Assign to Stations	allows the employee to be assigned to a Station and give a master skill level. See Adding and Managing Stations.
Assign Employee Agreement	If Policy Management is enabled, allows the employee to be assigned agreements. See Adding and Managing Employees.
Mass-Assign Employee Agreement	allows new employees to be assigned Employee Agreements and Employee Positions (if Lists have been created in the Enterprise/Admin section). If Policy Management is enabled, allows new employees to be assigned a policy. See Adding and Managing Employees.
View Leave	allows viewing of leave requests and status. See Adding and Managing Employees.

Action	Permission description...
Edit Leave	allows managing leave including approving and cancel if user is authorized at the location. See Adding and Managing Employees.

Locations Section Access

Action	Permission description...
View	allows viewing the information in the Locations section – no editing. See Adding and Managing Locations.
Add	allows adding locations to the enterprise. See Adding and Managing Locations.
Edit	allows editing information for locations. See Adding and Managing Locations.
Copy Settings	allows copying the settings from one location to other locations. See Adding and Managing Locations.
Deploy Users	allows the assignment of Users so they can login to the location. See Adding and Managing Locations.
Deploy Employees	allows employees to be deployed (assigned) to a location. See Adding and Managing Locations.
Deploy Stations	allows stations to be deployed to a location for scheduling. See Adding and Managing Locations.

Organization Section Access

Action	Permission description...
View Folders	allows viewing the organization folder structure – no editing. See Adding and Managing Organization Folders.
Edit Folders	allows additions, edits, or deletions to the organization folder structure. See Adding and Managing Organization Folders.
Edit	allows full access to reports to be added, edited or deleted. See Reports Overview.

Roles Section Access

Action	Permission description...
View	allows viewing the role settings in the Roles section – no editing. See Adding and Managing Roles.
Add	allows roles to be added in the Roles section. See Adding and Managing Roles.
Edit	allows existing roles to be edited in the Roles section. See Adding and Managing Roles.
Delete	allows existing roles to be deleted in the Roles section. See Adding and Managing Roles.
Assign to User	allows roles to be assigned to users. See Adding and Managing Roles.

Schedule – for Local Section Access

Action	Permission description...
View Local Schedule	adds Local Section to Menu bar; Adds List Schedules and Insert Template links to Tools folder; allows viewing the summary of the local schedules total shifts and hours that have been created by each location.
View Local SwapBoard	adds Swap Board link to Tools Folder; allows viewing the swapboard of shifts currently posted in each location for the next 7 days (Options tab filters are not applied)
Local Schedules Auto-Fill	adds Auto-Fill link to Tools folder; allows auto-fill to fill shifts for schedules created in the location (User does not have to be assigned to the location)
Edit Shift	under Shift Browser allows editing a location shift if User is assigned to the location
Assign Employee to Shift	under Shift Browser allows assigning employee to a location shift if User is assigned to the location
Post to Swapboard	allows posting shift for an employee to the swapboard (history shows user posted)

Stations Section Access

Action	Permission description...
View	allows the information in the Stations section to be viewed; no editing. See Adding and Managing Stations.
Add	allows stations to be added to the organization. See Adding and Managing Stations.
Edit	allows existing station information to be edited. See Adding and Managing Stations.
Delete	allows existing stations to be deleted. See Adding and Managing Stations.
Deploy to Location	allows existing stations to be deployed to a location. See Adding and Managing Stations.
Assign Employee	allows the employees to be assigned skills at existing stations. See Adding and Managing Stations.

Templates Section Access

Action	Permission description...
View	allows full access and editing to the Template section. See Adding and Managing Templates and Shifts.

Users Section Access

Action	Permission description...
View	allows information in the Users section to be viewed; no editing. See Adding and Managing Users.
Add	allows the addition of Location and Enterprise Users to the application. See Adding and Managing Users.
Edit	allows the User information to be edited. See Adding and Managing Users.
Delete	allows the ability to delete any User from the application. See Adding and Managing Users.
Change Password	allows the User password to be changed See Adding and Managing Users.

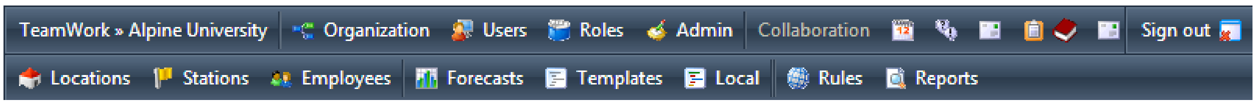
Deploy to Locations	allows the User to be deployed to locations so they can logon at the location. See Adding and Managing Users.
Assign to Roles	allows the assignment of roles to Users. See Adding and Managing Users.

Menu Selections and Windows

The following paragraphs present menu selections and then a description and view of each of the related windows you access in each section of the Enterprise portal.

Menu Selections

The following provides an overview of the Enterprise portal menu sections and windows. When you log in to the Enterprise portal, an Enterprise menu bar displays along with the following section access options. Enterprise users only see the sections they have been granted role privileges for.



As you click on each of the top menu selections in the Enterprise portal, a window displays an overview of the section contents in the right pane. A left navigation also displays both Menu selections and filtering Options relevant to the Menu selections.

Left Navigation

The two critical components in the left navigation are Menu and Options. The following describes each selection.

Menu

The Menu selection under the left navigation is where you find the data contained in that section. It provides Tools you can use to perform tasks and folders that hold your organizational data.

Options

The Options selection under the left navigation is where you find tools that help you filter the Menu Display. These tools help you locate exactly what you are looking for in the enterprise section and enable you to quickly view the appropriate data.

Links to Enterprise Portal Sections

You may click on the following links to become familiar with each section in the Enterprise Portal. Included are a description of how you use the functionality, an image of the windows, and any additional explanation that might be helpful.

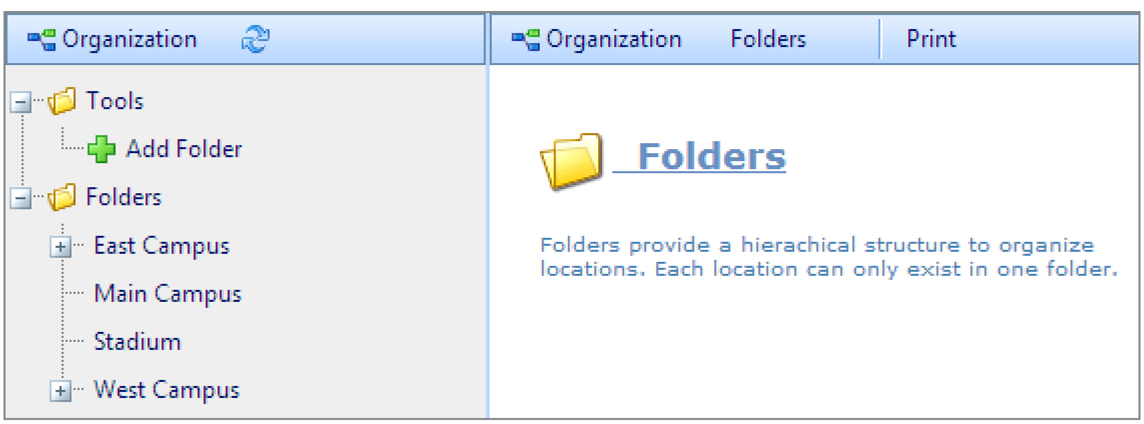
- Organization
- Users
- Roles
- Admin
- Collaboration
- Locations
- Stations
- Employees
- Templates
- Local
- Reports

Refer to the following paragraphs for a description of each section in the Enterprise portal.

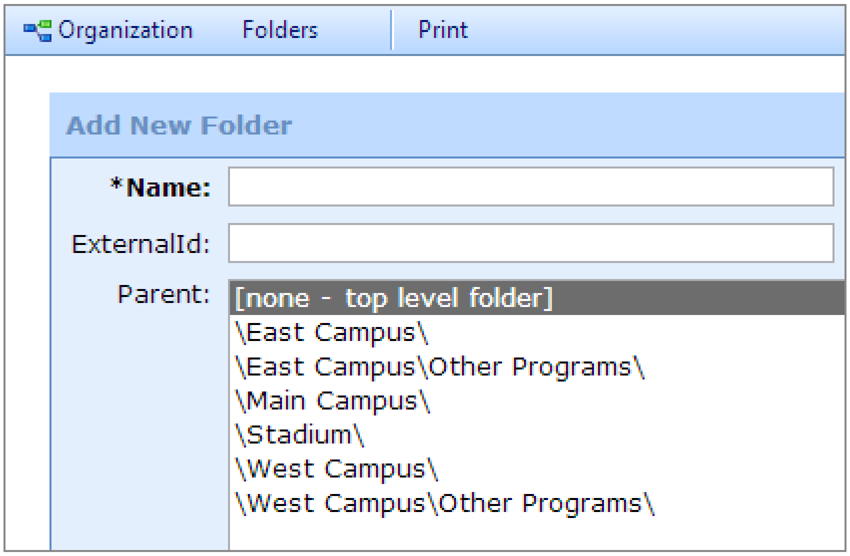
Organization

When you click on the Organization section, the Folders window displays. You can add Folders and organize locations and employees into these Folders. When folder-level access is set up for users, it allows you to restrict what data Enterprise users see and are allowed to work with.

Launch Organization



Add a Folder



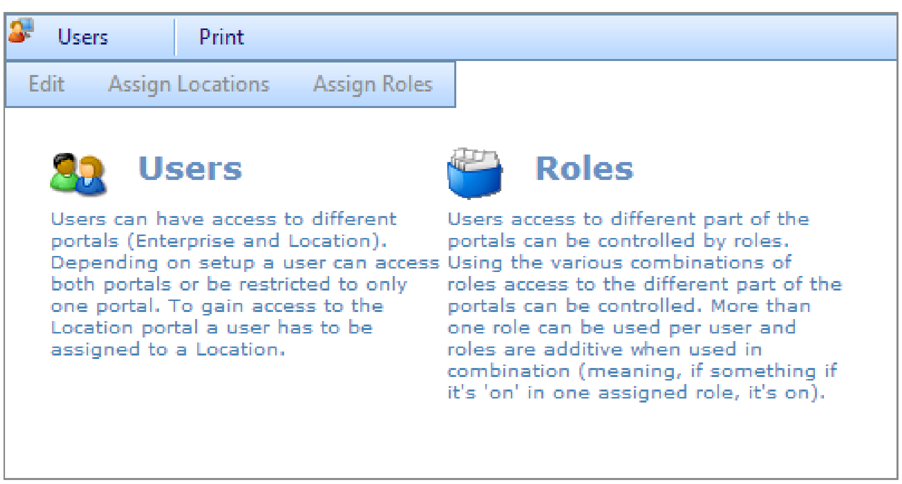
See Also

For a How To using the Organization section, see Adding and Managing Organization Folders.

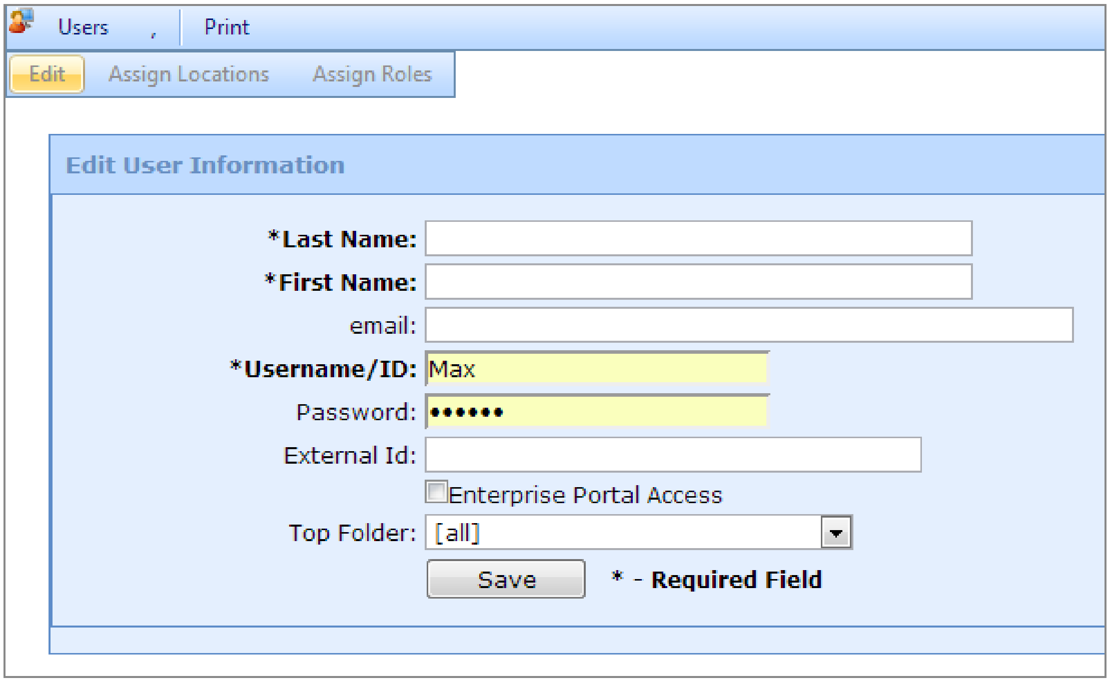
Users

When you click on the Users section, the list of Users that has been created displays. You create all User accounts in the Enterprise portal. These are the users you give access to for managing data in either the Enterprise portal or Location portal, or both portals. Frequently Users are Schedulers, Managers, and Organization Administrators. At least one User must have the privilege of adding users and assigning roles to other Users.

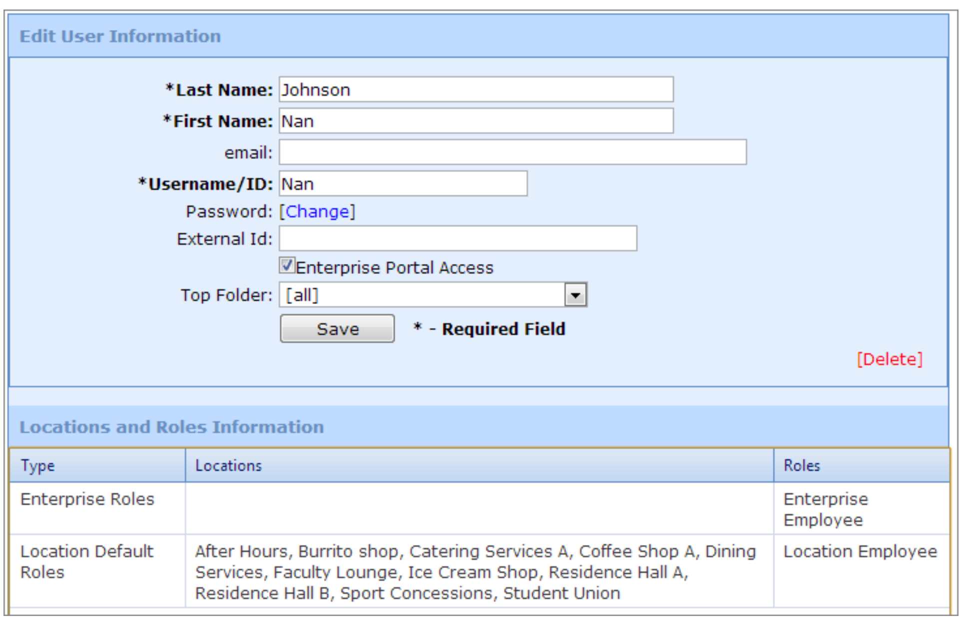
Launch Users



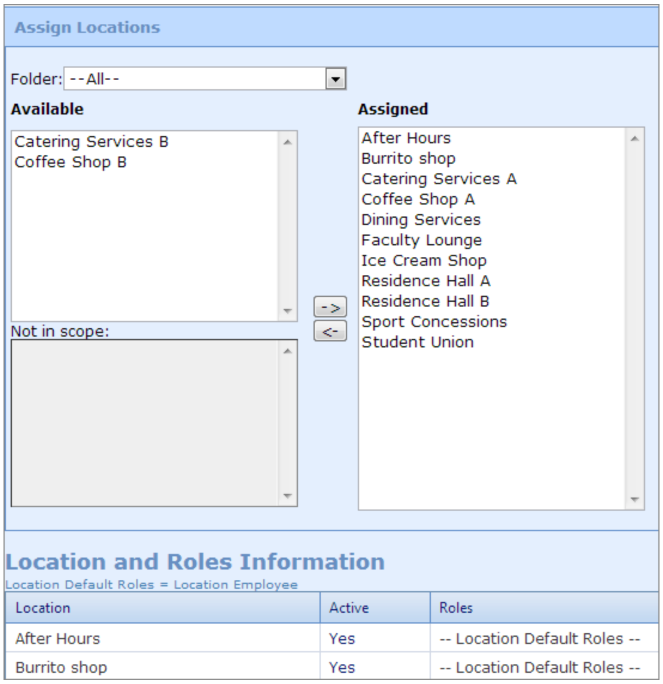
Add User



Edit User



Assign Locations



Assign Roles

See Also

For a How To using the Users section, see Adding and Managing Users.

Roles

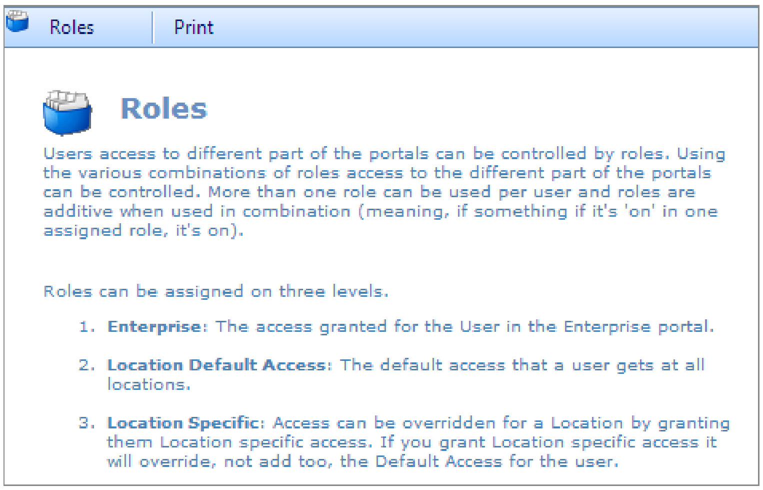
When you click on the Roles section, Roles displays. You establish all roles in the Enterprise portal. This includes roles for both the Enterprise portal and the Location portal. Then, you assign them to a user account.

Roles are the definition of system-related privileges. They control what a user can see and do in the Enterprise portal or Location portal. Think about the functions that members of your organization perform, and create roles that allow these users the privileges they need to continue performing these functions.

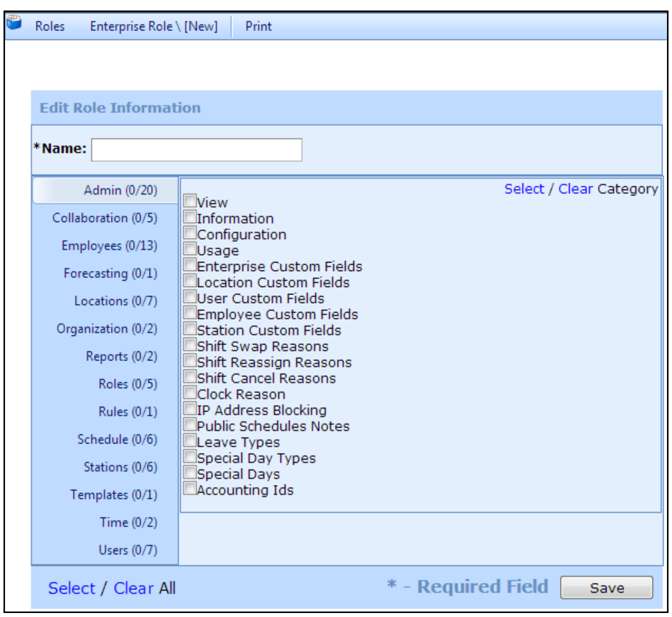
Note: There must always be one user (and we recommend two users) with Full Access privileges to the Enterprise portal and one user with Full Scheduler privileges to the Location portal.

For an understanding of role definitions, actions, and related privileges, see Enterprise Portal Role Definition for Part I Core Scheduling Package.

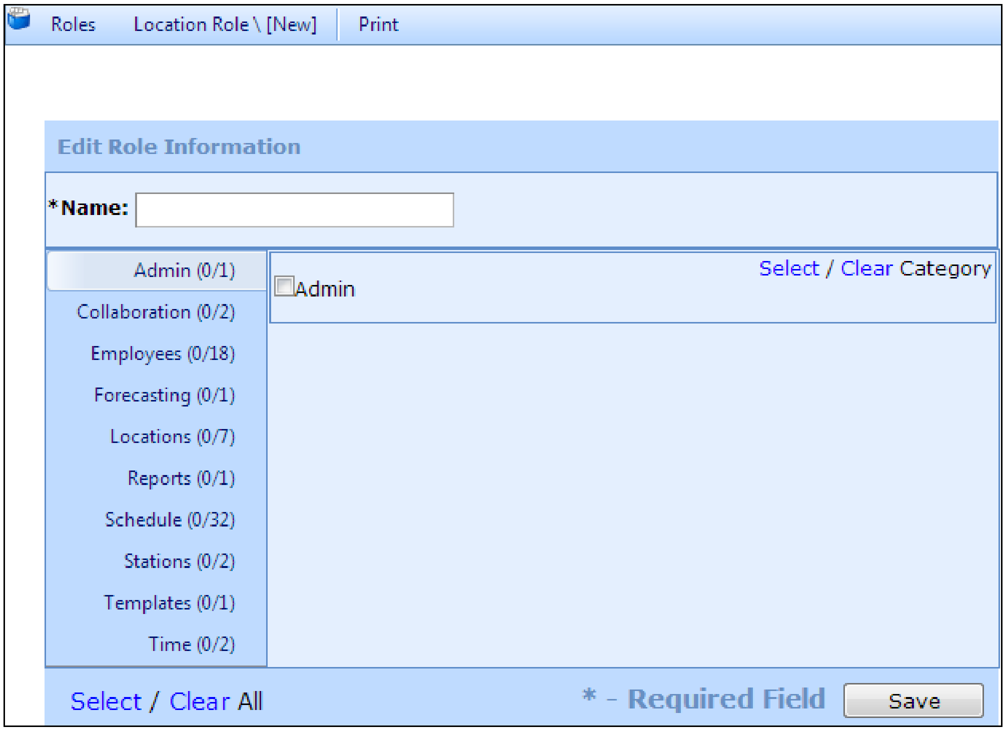
Launch Roles



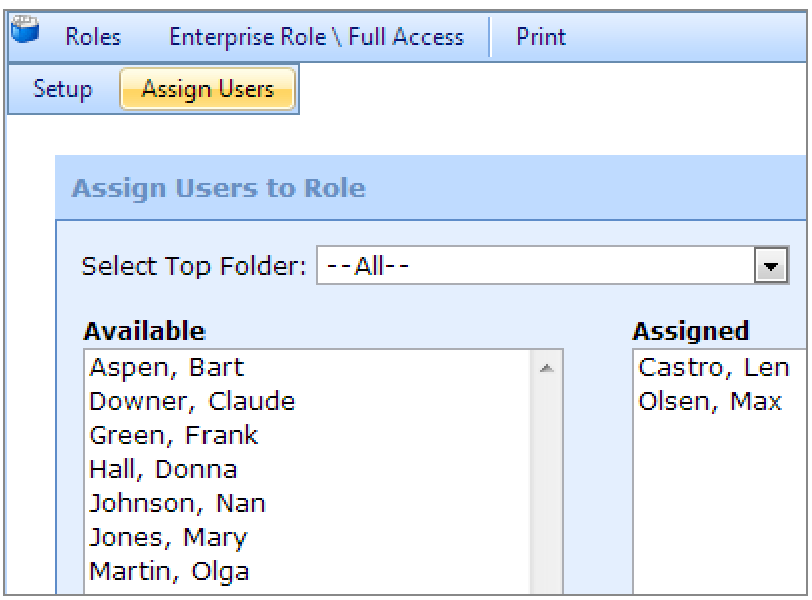
Add Enterprise Role



Add Location Role



Assign Role to User



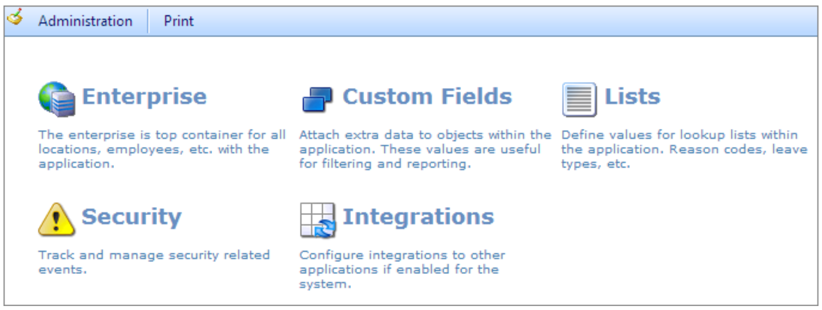
See Also

For a How To using the Roles section, see Adding and Managing Roles.

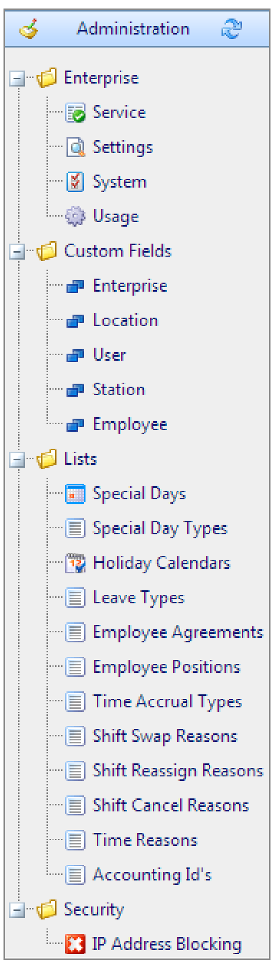
Admin

When you click on the Admin section, the Admin window displays a summary of functions. This section allows you to configure the Enterprise portal and define how your system is going to operate. You can also add a number of organization-specific lists and custom fields.

Launch Admin



Left Navigation for Admin



See Also

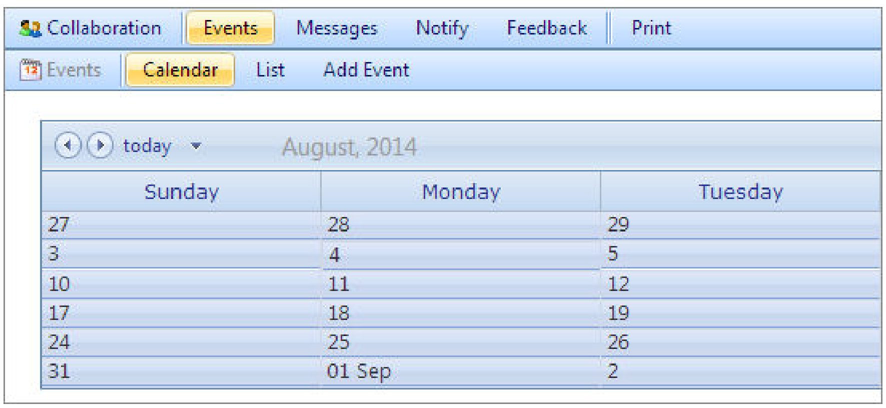
For How To's using the Admin section, see:

- Admin Folder Overview
- Enterprise Folder Overview
- Custom Fields Folder Overview
- Lists Folder Overview
- Security Folder Overview

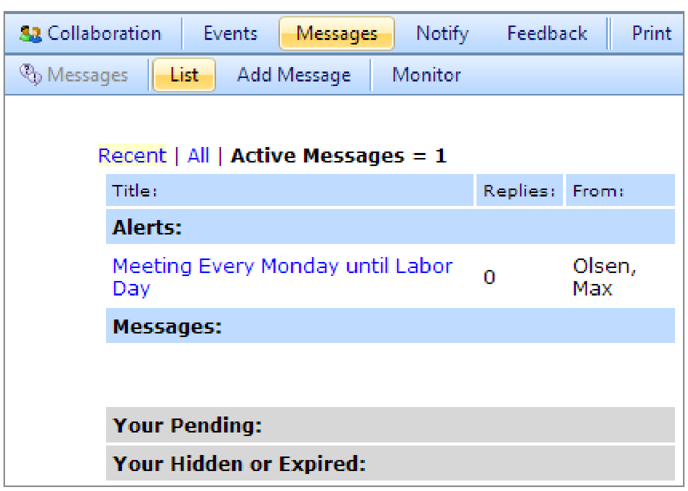
Collaboration

The Collaboration section contains a package of functions. Click on the icons to create calendar events, messages, email notifications, and design feedback surveys. Each icon launches a different Collaboration function.

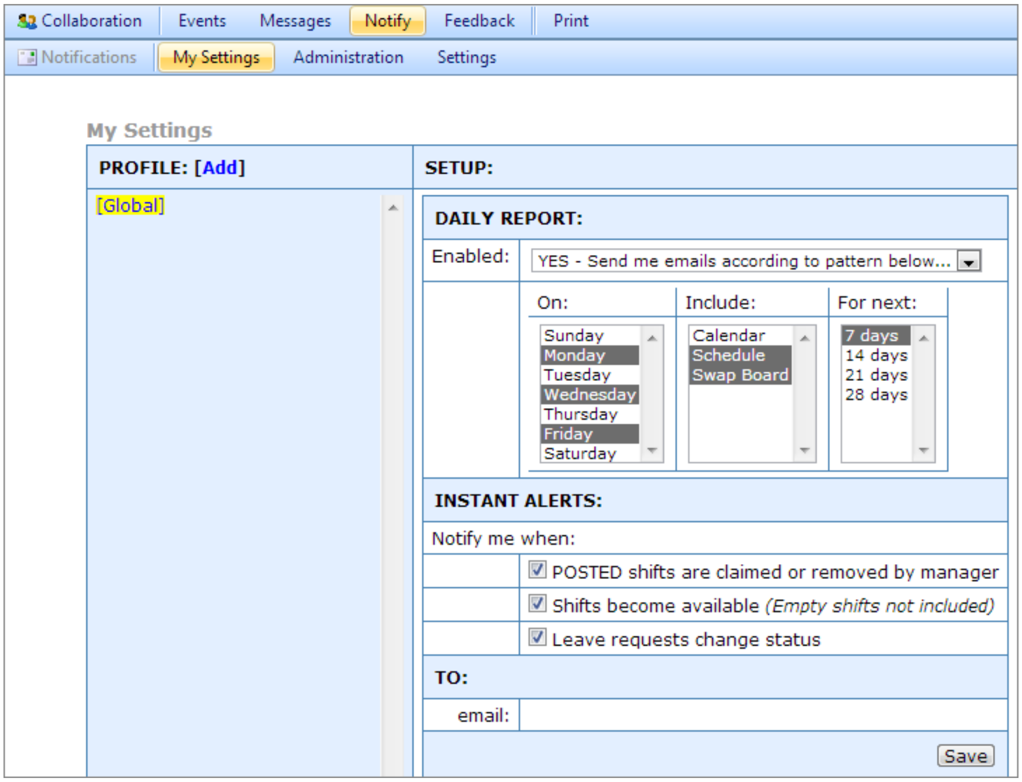
Launch Calendar



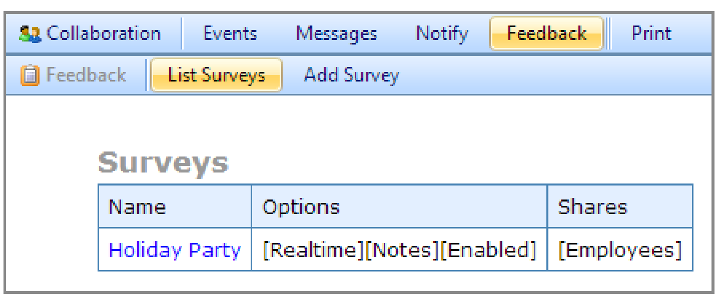
Launch Messages



Launch Notifications



Launch Surveys



See Also

For How To's using the Collaboration section, see:

- Collaboration Overview
- Creating Events
- Creating Messages and Alerts
- Creating Notifications
- Creating Feedback and Using Surveys

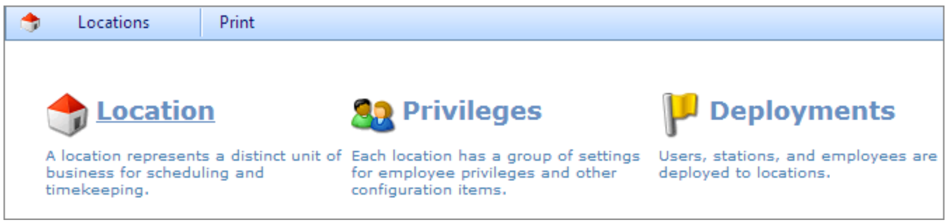
Locations

When you click on the Locations section, the Locations window displays. From this window, you can set up multiple Locations as defined by your organization. They can be physical buildings or departments that you want to create and manage separate schedules for.

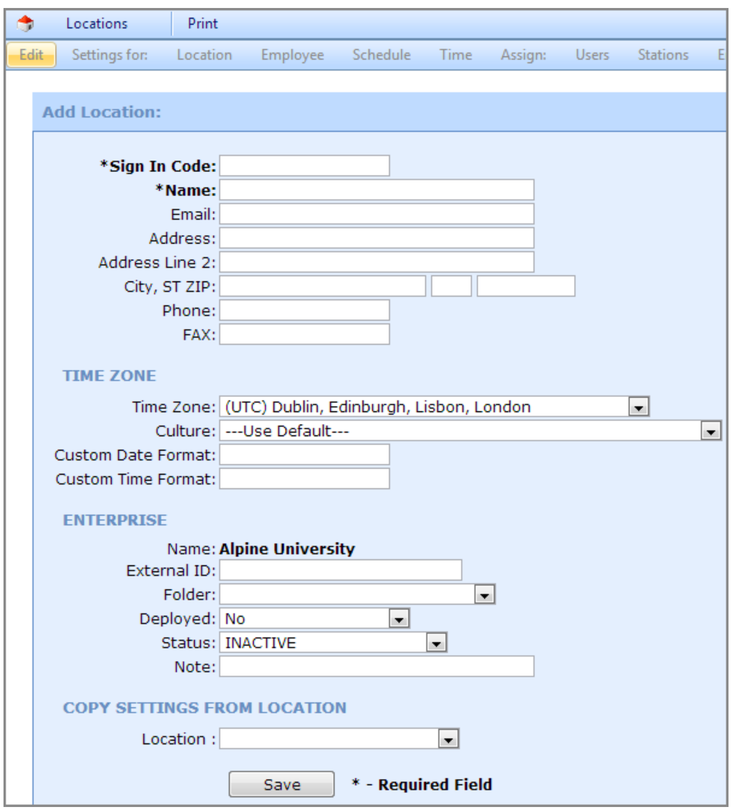
The Enterprise portal must assign users, stations, and employees to specific locations in order for the Location portal to be able to use the data.

In addition, you can view and/or establish location settings for week days and business hours, portal privileges and swapping rules, scheduling settings for AutoFill and breaks, and settings for time and rules. These location settings can also be controlled in the Location portal if allowed by User roles. See Understanding Enterprise Portal Role Definitions for Locations Section Access.

Launch Locations



Add Location



See Also

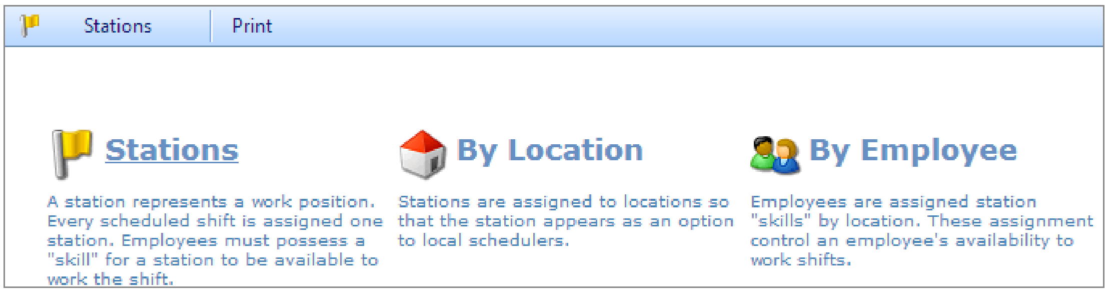
For a How To using the Locations section, see Adding and Managing Locations.

Stations

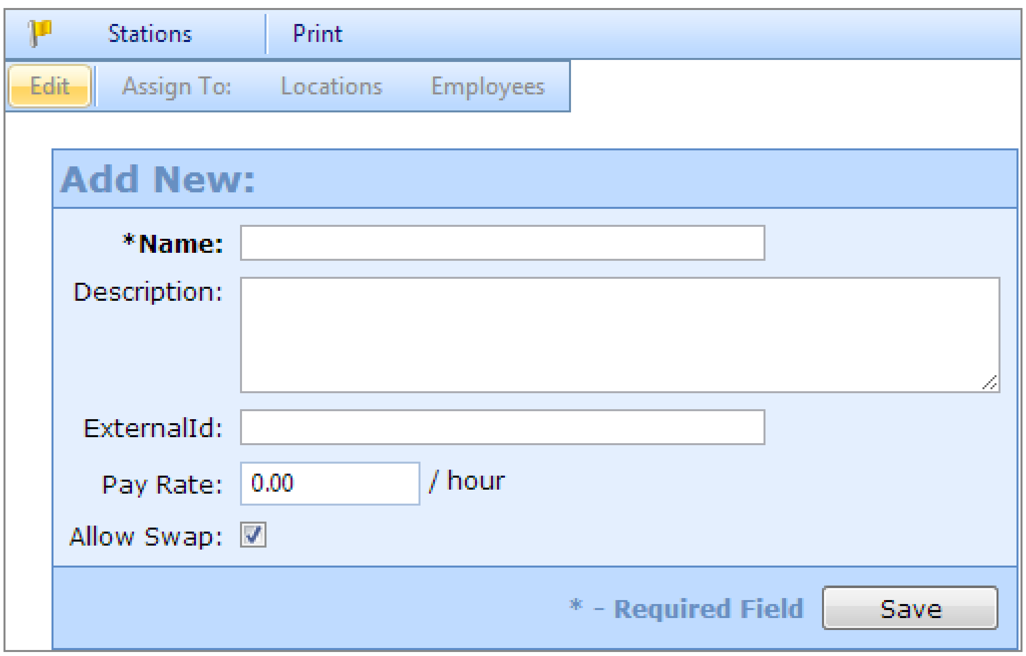
When you click on the Stations link, the Stations window displays. Stations are the distinct work areas or jobs within a location. You must assign Stations to locations in the Enterprise portal. You may also assign them to a Folder level to be used by all locations assigned to the same folder.

While you can assign employees to Stations in the Enterprise portal, many organizations chose to make these assignments in the Location portal.

Launch Stations



Add a Station



See Also

For a How To using the Stations section, see Adding and Managing Stations.

Employees

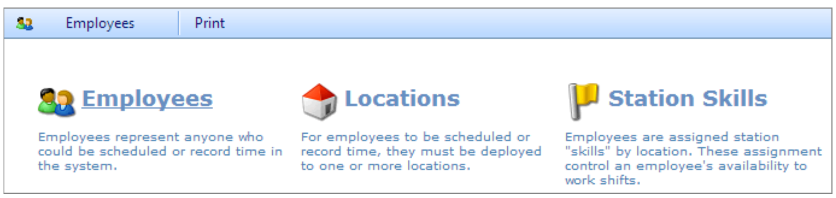
When you click on the Employees link, the Employees menu tab displays the list of employees entered and a Tools folder with a variety of tasks you can accomplish using these links. Employees are the people who are scheduled to work in shifts in the Location portal.

You set up all employee records in the Enterprise portal and you must also assign them to a location in the Enterprise portal. You may assign them to a folder, if your organization is using folders.

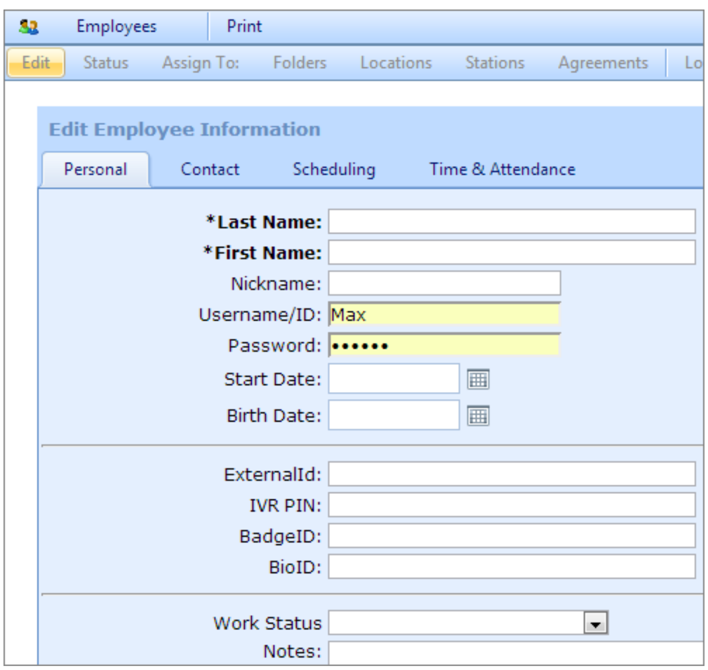
While you can assign employees to stations in the Enterprise portal, many organizations chose to make these assignments in the Location portal. In addition, you can enter an employee's Local Skills at stations in the Enterprise portal, but many organizations do this at the location level. You can also manage leave in the Enterprise portal, but many organizations do so in the Location portal.

Personal and contact information is collected and displays in the Employees windows in the Enterprise portal as well as in the Location portal. Organizations can allow Employees to enter their own contact information in the Employee portal. You enable this privilege with a Location portal setting under Admin.

Launch Employees



Add Employee



See Also

For a How To using the Employees section, see Adding and Managing Employees.

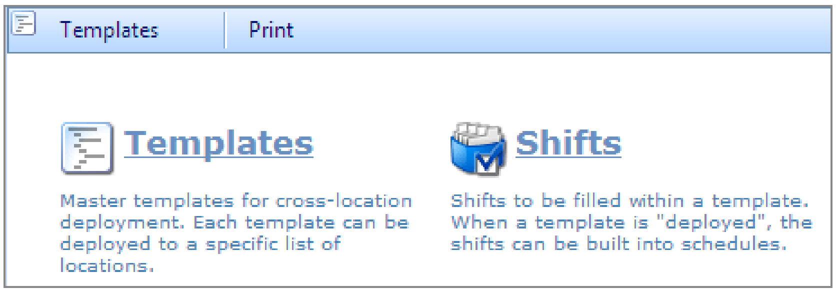
Templates

When you click on the Templates link, the Templates window displays options for creating weekly Templates containing shifts to be worked by employees.

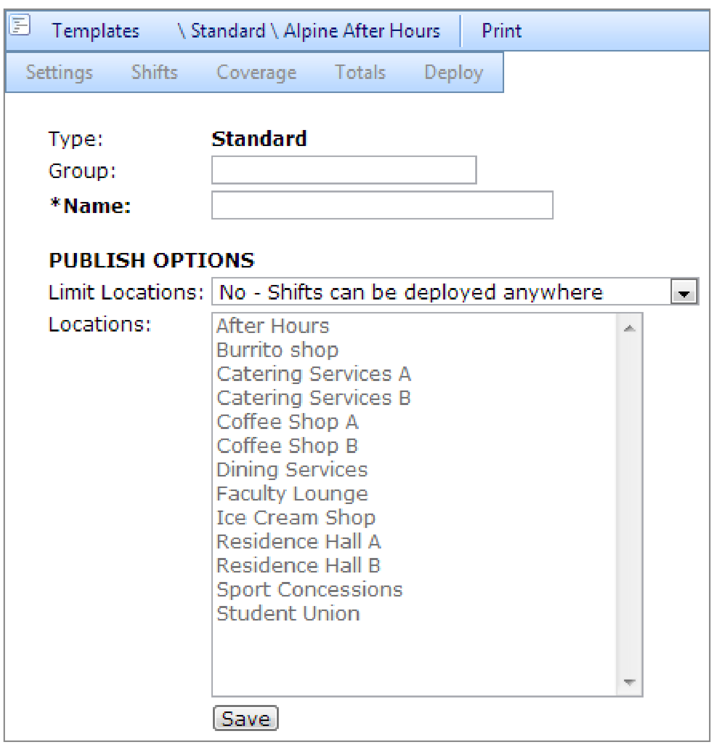
Templates that are created in the Enterprise portal can be made available for use in locations, however, they can only be edited in the Enterprise portal. Thus Enterprise Templates should be created only when multiple locations need to use the same template or when an Enterprise Administrator needs to control the shifts that are contained in the Template.

Templates that are specific to one location should be created in the Location portal.

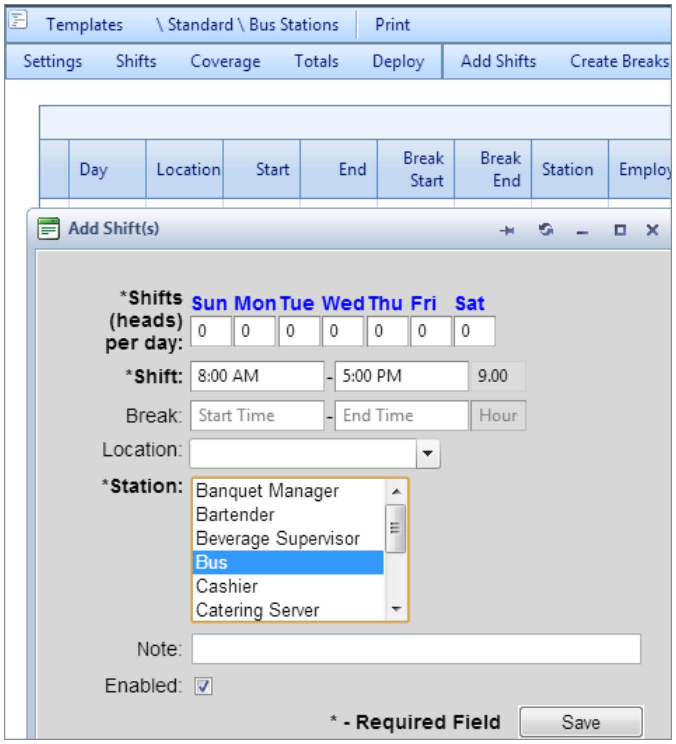
Launch Templates



Add New Templates



Add Shifts



See Also

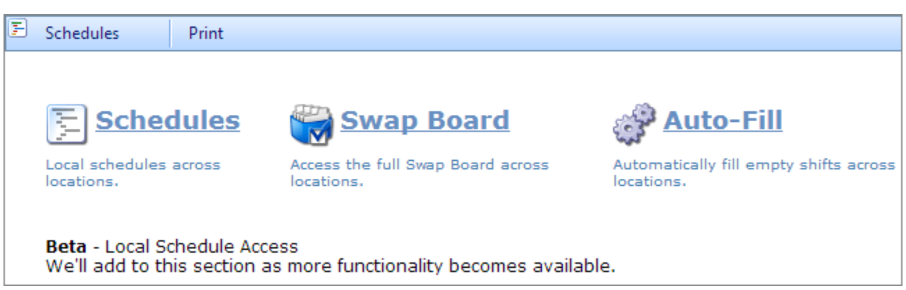
For a How To using the Templates section, see [Templates Section Overview].

Local

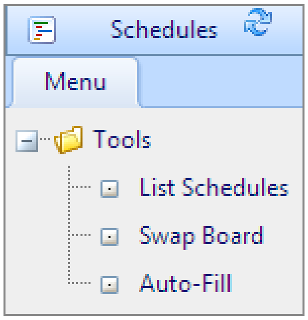
When you click on the Local section, the Local window displays shift scheduling options. Use this to view summary data of the schedules created by Locations.

Note: This section of the top menu is controlled by a role setting. Under the Schedule role privileges, there is an action to View Local Schedule. When selected, the Local section displays on the top menu.

Launch Local



Left Navigation for Local



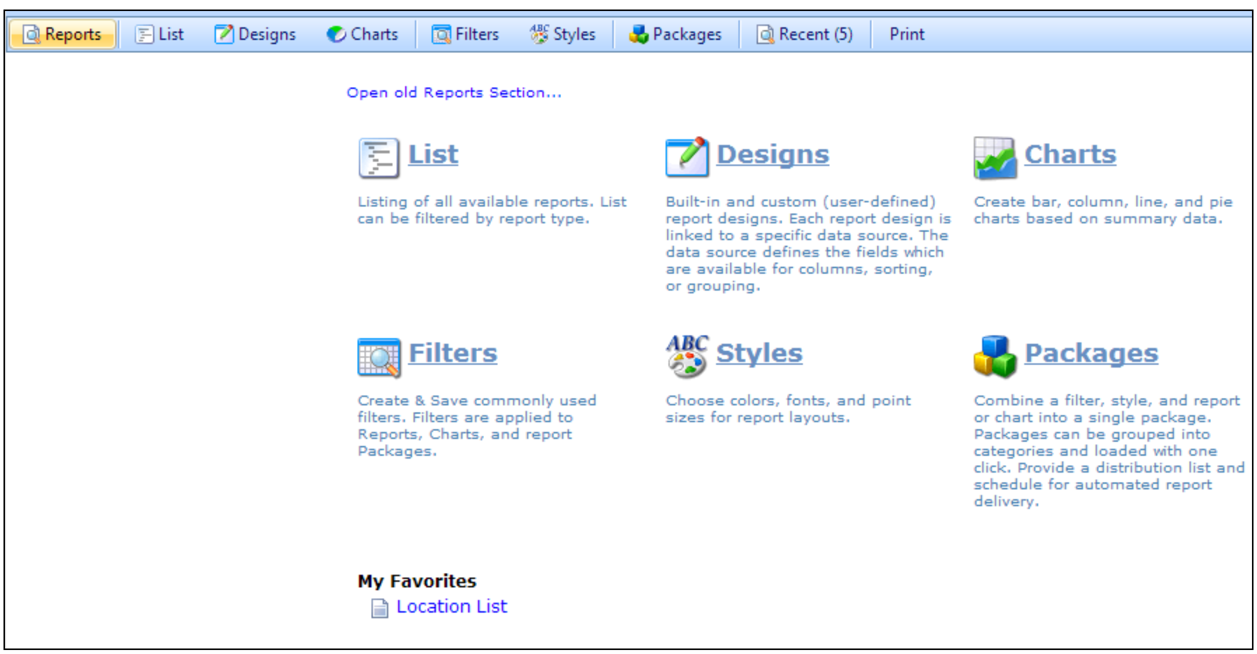
See Also

For a How To using the Local section, see Local Overview.

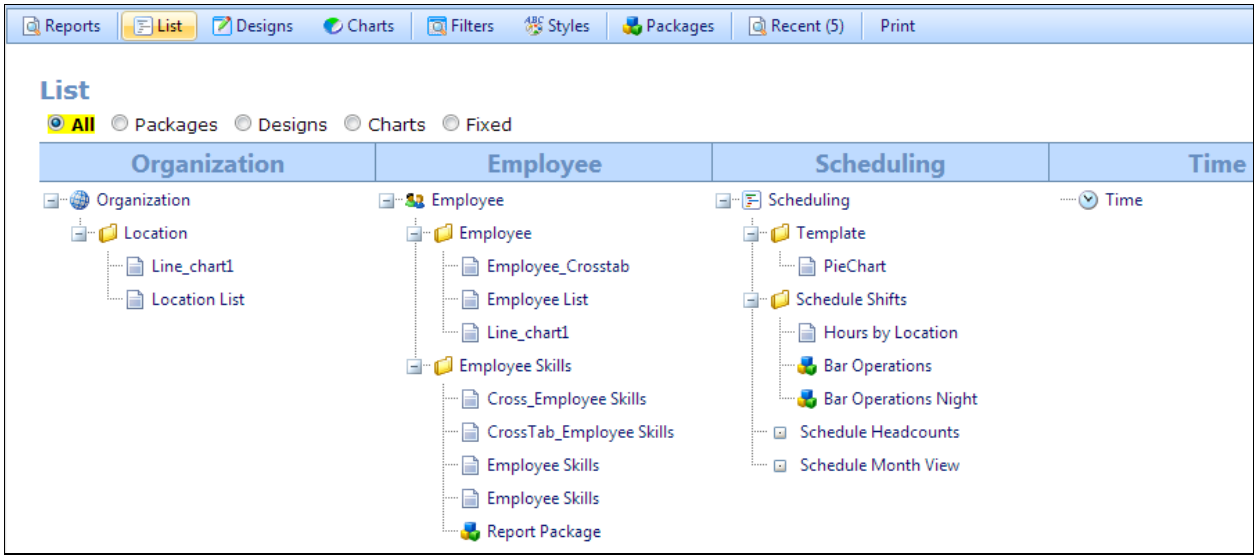
Reports

When you click the Reports link, reports menu selections display. The Reports section allows you to view data across all locations, shifts, and employees.

Reports Menu Selections



Report List



See Also

For How To's on using the Reports section, see:

- Reports Overview
- Understanding Report Designs
- Report Resources
- Report How To's
    - Using the Reports Home Page
    - Using the Reports Tab
    - Using the Report List
    - Viewing a Report
    - Editing a Report
    - Creating Report Filters
    - Printing a Report
    - Creating Report Designs
    - Creating Charts
    - Creating Report Styles
    - Creating Report Packages
    - Deleting a Report

Chapter 3 - How To's for Setting Up the Enterprise Portal

Overview of the Process

The following provides an overview of setting up the Enterprise portal. Included are preparation, links to step-by-step procedures, configuration, and the establishment of related Enterprise portal records.

Preparing to Set Up the Enterprise Portal

Determine what you are going to include in the Enterprise portal and establish a realistic timeline of what it will take you to do it. This includes gathering information and may involve working with other people in your organization and ScheduleSource.

- Talk with our ScheduleSource Support Team who can provide a one-time initial data load of your employee information. If you have questions, feel free to contact them. See Opening a New Support Case.
- Talk with our ScheduleSource training team and review the available help cards and tutorials. See Using the TeamWork Learning Center.
- Think about optional features you may want to use: swap boards, bid boards, requesting leave, etc.
- Think about how you will use the Collaboration package. At a minimum, it is useful to post events, create and distribute messages and alerts, and set up email notifications.

Setting Up Enterprise Portal Records

The following How To's help you set up and configure the Enterprise portal.

- Adding and Managing Locations
- Adding and Managing Employees
- Adding and Managing Stations
- Adding and Managing Users
- Adding and Managing Roles
- Adding and Managing Organization Folders

Configuring the Enterprise System

There are a number of Enterprise settings you should review and understand. They include:

- Configuring Enterprise Settings
- Configuring the Enterprise System — this section of the Enterprise portal includes Enterprise system settings and features. See also Security for information on managing passwords and IP Blocking.
- Reviewing System Usage
- Reviewing the Enterprise Service Agreement

Setting Up Additional Enterprise Portal Records

The following link to sections that contain How To's for setting up and using Enterprise portal records.

- Admin (Lists and Custom Fields)
- Collaboration (Events, Messages, Notifications, Feedback)
- Templates (Building Templates and Shifts at the Enterprise portal for use in the Location portal)
- Local (List Schedules, Swap Board, AutoFill)
- Reports (Reporting on Enterprise portal and Location portal data)

Adding and Managing Locations

Use Locations to establish distinct areas where employees work where you want to create and manage separate schedules. Once you add a location, you configure settings and will assign any of the following to that location: Users, Stations, and Employees.

Using a Two-Step Process

TeamWork allows you to maximize your efforts by allowing you to add and configure one location and then copy all of those settings to another location. If most of the settings are the same, simply change the settings that are different. To do this:

- Set up the first Location. Go to each of the settings windows and enter your selections: Location, Employee, Schedule, and Time (if you are using the Time & Attendance module.)
- Copy the settings from the first Location to the second Location. Make any necessary changes and click Save.

Adding and Setting Up Locations

There are several steps involved in adding and setting up a Location. They include:

- Adding a Location — establish, deploy, and activate a location.
- Configuring Location settings — establish week days, their priority, and business hours.

- Configuring Employee settings — enter portal privileges and swapping rules for employees working in this Location.
- Configuring Schedule settings — set up the parameters for auto-filling schedules at the Location level.

Refer to the following How To's.

To add a Location:

1. Click the **Locations** link on the top menu.
2. On the left navigation under Menu > Tools, click **Add Location**.
   Add Location window displays in the right pane.
3. On the Add Location window, enter required location information.
   Sign In Code: The account code that will be used to log on to the Location and Employee portals. (We recommend using no spaces in between words.)
   Name: The name that will appear in the top left menu bar when the Location is opened.
4. Enter additional address information as desired.
5. Under Time Zone, select the **Time Zone** using the drop-down list.
6. Maintain the **Culture** selection of Use Default for U.S. locations or change it to another location to meet language requirements. The Culture selection controls the language that displays when users log in to this location.
7. Leave **Custom Date Format** and **Custom Time Format** fields blank for U.S. For other format options, contact ScheduleSource.
8. Under Enterprise, if Location is ready for use and you want users to be able to log in, select both of the following:
   Deployed: **Yes - It is fully set up**
   Status: **ACTIVE - Log On Available**

   Note: If this location is not ready for use, maintain the default settings: Deployed: No and Status: INACTIVE.
9. Under Copy Settings From Location, you may choose to copy the settings of an existing location. Select it from the Locations drop-down list. Most Locations settings from this window and other Locations Settings windows copy and you can tweak entries that need to be changed.
10. Click **Save**.
    Edit Location Information window displays.
11. Click the Refresh icon to display the new location in the left navigation under Menu > Locations.
    Note: Locations display in separate folders for Active and InActive status, depending on the display format chosen under the Options tab.

To configure Location settings:
Note: These settings can also be entered and controlled in the Location portal.

1. On the left navigation under Menu > Locations, click the Location you want to configure.
   Edit Location Information window displays in the right pane.
2. On the right toolbar, select **Location > Weekdays & Business Hours**.
3. On the Settings \ Location \ Week Days window, select the radio button that identifies the day that is the **First Day** of the week for when your schedule will start. For example, many typical work weeks in the U.S. begin on Sunday or Monday.
4. If it is important to your organization, select a Rank or leave a default of 1. (9 highest/1 lowest)

   Explanation: A food service that does greater business on a weekend might rank Friday, Saturday, and Sunday as 9, the highest ranking. This ensures that those day's shifts are filled first and empty shifts are pushed to lower priority days.

5. Business Days/Hours – Leave blank. (applies to Custom module use)
6. Click **Save**.

To configure Employee settings:

Note: These settings can also be entered and controlled in the Location portal.

1. On the left navigation under Menu > Locations, click the Location you want to configure.
   Edit Location Information window displays in the right pane.
2. On the right toolbar, select **Location > Employee > Portal Privileges**.
3. On the Settings \ Employee \ Portal Privileges window, select the check boxes for the privileges you want to grant to employees assigned to this Location. They involve schedule and related shift information the employee can view, edit, and approve.

   Explanation: Click on the question mark by each option to view a brief summary of what the privilege involves.
4. Click **Save**.
5. On the right toolbar, select **Location > Employee > Swapping Rules**.
6. On the Settings \ Employee \ Swapping Rules window, select the check boxes and numerical values for the settings you want to enable for this Location. They involve swapping, scheduling constraints, and additional settings.

   Explanation: Click on the question mark by each option to view a brief summary of what the setting involves.
7. Click **Save**.

To configure Schedule settings:

Note: These settings can also be entered and controlled in the Location portal.

1. On the left navigation under Menu > Locations, click the Location you want to configure.
   Edit Location Information window displays in the right pane.
2. On the right toolbar, select **Location > Schedule > AutoFill Settings**.
3. On the Settings \ Schedule \ AutoFill window, type the Global Constraints for AutoFill. Be aware that you can override AutoFill limits when you schedule an employee manually in the Location portal. These settings are used by the AutoFill engine to determine the priority for filling shifts in every schedule.
4. Enter the default settings for maximum days, shifts, and hours for the categories that apply, i.e., 1-week, 2-week, or Monthly schedules. The maximum hours are enforced for all employees using these Global Constraints. If the max hour limit set in the Employee scheduling parameters section is Less, then the lesser limit will be enforced.
5. Enter the **Split-shift gap range**. This only applies if employees can work more than one shift per day.
   min - minimum number of hours you require between split shifts within one day
   Max - maximum number of hours you require between shifts within one day
6. Enter the hours of **Downtime between days**. This is the minimum number of hours you require before an employee can work another shift between consecutive days. It primarily applies to 24-hour shift situations, and you may use it to prohibit employees from working back-to-back days or long double shifts.

7. Enter the hours in **Load Balancing Steps**. The AutoFill engine uses the hours you enter in these text boxes to distribute work among employees. The scheduling algorithm makes three passes to make shift assignments. The number of max hours it will fill for each employee on each pass is based on the hours entered in each box. Refer to the following guidelines to use the engine to your best advantage.

   - First box: Decide what your goal is. If your goal is to give every employee some hours, enter a low number of hours. For example, if you enter 20, the engine assigns every employee 20 hours of work. If your goal is to have the most qualified person assigned to work, enter 40 and the engine assigns the most qualified employee to work 40 hours while a less qualified employee may not receive any hours.
   - Second box: To further distribute hours equally, enter 30 in the second box or leave the default at 40 hours. Then, the engine assigns each employee up to 30 or 40 hours, depending on how many hours the employees have available to work.
   - Third box: This value is gray and cannot be changed. It is the 1-Week maximum number of hours entered under Global Constraints. The engine assigns employees as many hours as they have remaining, up to the maximum number of hours allowed for a week or the individual setting of less or max number of hours allowed for the employee.

8. Enter **Randomization** factors for Skills and Shifts. Use Skill Randomization to vary shift assignments from extremely variable assignments (High) to less randomization (Low), or turn Randomization off. Use Shift Randomization to greatly vary shift assignments (High) to less shift randomization (Low), or turn Randomization off.

9. Enter **Shift Priorities** for Rankings, Length, and Coverage. This allows you to tell the AutoFill engine what is most important when it makes assignments.
   - Rankings: If you want your most skilled employee to be assigned at your most priority station first, select a 9 using the drop-down list. If they are less important, select a number between 1 and 8.
   - Length: to make sure that shifts with the greatest number of hours are covered before shorter shifts, select a higher number under length using the drop-down list.
   - Coverage: to make sure you can get coverage first and it is not as important to use the most skilled employee or consider shift length, leave the default at 7 or raise it to a higher number.

10. Click **Save**.

11. On the right toolbar, select **Location > Schedule > Break Settings**.

12. On the Settings \ Schedule \ Breaks window, select information about breaks that conforms to your organization's policies.

13. Click **Save**.

Adding and Managing Employees

Use the Employees section to add employees in the Enterprise portal. In addition to entering personal data, contact information and scheduling, you can also assign employees to Folders, Locations, and Stations from this section. You can assign Local Skills to stations for all locations, and track Leave requests. Included are:

- Adding an Employee — establish an Employee record and enter employee information.
- Assigning an Employee — assign an Employee to Locations and Stations and assign the Employee's Local Skills to all Locations. If your organization uses Folders, you may also assign an Employee to a folder.
- Changing Employee Status — change an Employee's status to inactive. Once an employee's status is inactive, you can delete the employee if they are not scheduled in any active shifts and do not have any time data in the system.
- Verifying Setup — view summaries for the data entered for Employee and verify completeness of necessary data.
- Viewing, Adding, Granting, and Denying one Employee's Leave — view, add, grant, deny, and delete one Employee's Leave Requests.
- Managing Leave — view and act on all Employee Leave Requests. You can also enter a leave request for an employee from this window, grant, deny, or delete a Leave Request.

Refer to the following How To's.

To add an Employee:

1. Click the **Employees** link on the top menu.
2. On the left navigation under Tools, click **Add Employee.**
   Edit Employee Information window displays in the right pane. The Personal tab is active.
3. On the Edit User Information window, type: **Last Name** and **First Name**.
   Note: These fields must be entered in the Enterprise portal. Your organization can allow all other Employee Information to be entered in the Location portal.
4. Enter **Start Date** and **Birth Date**, especially if you want to use these dates as criteria in filling a bid board created in the Location portal. Enter any additional information.
5. Click **Save**.
6. Click the **Contact** tab. Enter Employee contact information and click **Save**.
   Note: Many organizations ask Employees to enter this information in the Employee portal.
7. Click the **Scheduling** tab. Make necessary changes to the default information that displays and click **Save**.
8. Once you have added an Employee, see Assigning an Employee.

To assign an Employee:

1. Click the **Employees** link on the top menu.
2. On the left navigation under Employees, click on the Employee you want to assign.
   Edit Employee Information window for the Employee you selected displays in the right pane.
3. If your organization uses Folders, click the **Folders** tab and select a Folder or leave the default as All.
   Note: If you select a Folder or Sub Folder, the subsequent list of Available Locations displays only the Locations in that Folder.

4. Click the **Locations** tab. Select the Locations that you want to assign this employee to from the **Available** list.
   The Location names are highlighted.
5. Click the right arrow to move them to the **Assigned** list.
   Location names display under Assigned list. Location summary information displays in a table below.
   Remember: You can use Shift + Click and Ctrl + Click to quickly move multiple Locations from the Available list to the Assigned list.

To change Employee Status:

1. Click the **Employees** link on the top menu.
2. On the left navigation under Employees, click on the Employee whose status you want to make inactive.
3. Click on **Status**.
   Employee Status window displays.
4. On the Employee Status window, select the date the Employee becomes inactive. Beginning on this date, the employee will not be able to be scheduled and the employee will not be able to log on to the Employee portal.
5. Click **Apply**.
   Note: You must make an employee inactive before you can delete that employee.

   Important: If the employee is active for the entire Enterprise, a delete option displays on the Status window. Deleting an employee also deletes ALL data related to that employee. However, employees cannot be deleted if they are scheduled in any active schedules.

To verify Setup:

1. Click the **Employees** link on the top menu.
2. On the left navigation under Tools, click **Verify Setup.**
   Verify window displays in the right pane.
3. Click on each link. A summary of each section's status displays.

To view, add, grant, and deny one Employee's Leave:

1. Click the **Employees** link on the top menu.
2. On the left navigation under Employees, select the employee whose Leave you would like to view.
3. Click the **Leave** tab.
   Leave window displays with leave information.
4. To add Leave, on the Leave window click **Add Leave Request**.
   Add Leave Request window displays.
5. On the Add Leave Request window, select **Leave Type**.
   Note: If Leave Types are entered in the Enterprise portal, you must select the type from the drop-down list.
6. Select a **Start Date** and **End Date**.
7. Type the number of **Days in Range** or verify the automatic calculation.
8. Type the number of **Total Hours** or verify the automatic calculation. Select the check box to Sync Hours.
9. Select the **Status**: Request or Grant.
10. Enter Times only if the request is for less than one day, then specify the hours start and end time.

11. Add a Comment as desired.
12. Click **Request**.
    Leave Request Status displays as Requested and is highlighted with a yellow background.
    Leave Request Status displays as Granted and is highlighted with a green background.
13. To deny a Leave request, click **Deny**.
    Pop-up window questions: Deny leave?
14. Click **OK**.
    Leave request Status changes to Denied and is highlighted with a pink background.

To Manage Leave:

1. Click the **Employees** link on the top menu.
2. On the left navigation under Tools, click **Manage Leave.**
   Manage Leave window displays in the right pane with a summary of all employee Leave requests for a year categorized by status.
3. Click the forward and backward arrows next to Today to display future and past years.
4. To add a Leave Request, click **Add Leave Request**.
   Add Leave Request window displays with a list of employees.
5. On the Add Leave Request window, select an Employee whose Leave Request you are adding.
6. Select a Leave Type.
   Note: If Leave Types are entered in the Enterprise portal, you must select the type from the drop-down list.
7. Select a **Start Date** and **End Date**.
8. Type the number of **Days in Range** or verify the automatic calculation.
9. Type the number of **Total Hours**. or verify the automatic calculation. Select the check box to Sync Hours.
10. Enter Times only if the request is for less than one day, then specify the hours start and end time.
11. Add a Comment as desired.
12. Click **Request**.
    Leave Request displays for selected Employee.
13. To change the status of the request, click on: Request, Grant, or Deny.
    Pop-up window questions the action.
14. Click **OK**.
15. To delete a Leave Request, select the check box of the request in the Delete column and click **Delete**.
    Pop-up window questions: Delete selected day off entries?
16. Click **OK**.

Adding and Managing Stations

Use Stations to establish distinct work areas or jobs within a Location. First you add a Station, and then you must assign it to one or more Locations.

From this section of the Enterprise portal, you can also assign a Station to employees and rank each employee's ability to perform the work. However, in most organizations, schedulers perform these functions in the Location portal.

Setting up Stations can include:

- Adding a Station — establish the distinct work areas and jobs in your organization
- Assigning a Station to a Location — assign these stations to one or more locations
- Assigning and Unassigning an Employee to a Station — assign employees to work in these stations at a location
- Assigning Employees Skills for a Station — establish an employee skill to work in a station

Refer to the following How To's.

To add a Station:

1. Click the **Stations** link on the top menu.
2. On the left navigation under Menu > Tools, click **Add Station**.
   Add New window displays in the right pane.
3. Type the Station **Name**. If desired, type a description of the work position or job.
4. ExternalId is used if you are downloading data to external systems.
5. Enter the Pay Rate for this station. It is used to calculate the cost of an empty shift in the Location portal > Schedule section.
   Explanation: An employee rate of pay can be entered in the Location portal, which is used when the employee is assigned to a shift. If the employee pay rate is blank, TeamWork uses the station pay rate to calculate the cost of a shift.
6. Verify the check box to **Allow Swap** is selected if your organization wants to allow swapping on this station.
7. Click **Save**.

To assign a Station to a Location:

1. Click the **Stations** link on the top menu.
2. On the left navigation under Menu > Stations, click on the station you would like to assign to a Location.
   Edit Station window displays in the right pane.
3. Click the **Locations** tab.
   Assign to Locations window displays.
4. If Folders are being used in your Organization, you may select the Folder. If not, leave blank.
5. Select the Location in the **Available** list to which you want to assign the Station.
   The name is highlighted.
6. Click the **Add** arrow to move the Location to the **Assigned** list.

To assign and unassign an Employee to a Station:

1. Click the **Stations** link on the top menu.
2. On the left navigation under Menu > Stations, click on the Station to which you would like to assign an employee.
   Edit Station window displays in the right pane.
3. Click the **Employees** tab.
   Assign to Employees window displays.
4. If Folders are being used in your Organization, you may select the Folder. If not, leave blank.
5. Verify Status is Active or Pending and Active.
6. To assign an employee, click on the employee name in the **Available** list.
7. Select a number from 9 - 0 (9 = highest) to enter employee skills at the Station.
   Note: This skill number may be assigned in the Enterprise portal at this time and changed later in the Location portal.
8. Click the **Add** arrow.
9. To assign employee skills for Station, see Assigning Employees Skills for a Station.
10. To unassign an employee that was previously assigned, select the employee from the Assigned list and click the **Remove** arrow.

To assign Employees Skills for a Station:

This How To covers a procedure that is optional at the Enterprise portal. In most organizations, schedulers assign Employee skills to Stations in the Locations portal. This is because an individual who is responsible for scheduling a Station in a Location may be more familiar with each Employee's skills in performing work at that Station. Different locations may also need to give different skill levels to the same station.

1. Click the **Stations** link on the top menu.
2. On the left navigation under Menu > Stations, click on the Station you would like to assign Employee Skills for the Location.
3. Click on the Employees tab.
   Assign to Employees and Local Skills windows display.
4. Click on the number under Local Skills > Skilled. For example, **0**.
   Station name > Location display with a list of employees who are assigned to the Station.
   Remember: The Employee must be assigned to the Location for an input box to display.
5. Enter a number between 1 - 9 for each employee assigned to this station. When Auto-Fill is run, it places highest ranked employees into shifts first.
6. Enter a 0 if you only want the employee to be manually selected and placed into a shift by a Scheduler in the Location portal. Auto-Fill does not place any employee with a skill level of 0.

Note: If you chose to assign skills to employees in the Enterprise portal, you can also use the following link: Employees (select an employee) > Local Skills. The Assign Local Skills window displays a list of all Locations and Stations. You can enter a number that identifies the skills an employee has in each area the employee is assigned to.

Adding and Managing Users

Use the Users section to add Enterprise Users, Enterprise & Location Users, and Location Users. From this section, you can also assign them to a location and assign them a role. It does not matter which you set up first, locations, roles, or users. Once you have established User records, you can assign them to Locations and Roles from this section. Included are:

- Adding an Enterprise User — establish a User account with responsibility for the entire Enterprise.
- Adding a Location User — establish a User account with responsibility for one or more Locations.
- Assigning a Location to a User — assign one or more Locations to a User.
- Assigning a Role to a User — assign one or more Roles to a User.
- Adding an Enterprise & Location User — establish a User account with responsibility for the entire Enterprise. You can also assign the User to one or more Locations.
- Deleting a User Account — delete a User account.

Refer to the following How To's.

To add an Enterprise User:

1. Click the **User** link on the top menu.
2. On the left navigation under Tools, click **Add User**.
   Edit User Information window displays in the right pane.
3. On the Edit User Information window, type a **Last Name**, **First Name**, **Username/ID**, and **Password**.
4. Select the check box for Enterprise Portal Access.
5. If Folders are being used in your Organization, select the Top Folder that the User will have access to in the Enterprise portal.
6. Click **Save**.
7. Once you have added an Enterprise User, see:
   - Assigning a Location to a User
   - Assigning a Role to a User

To add a Location User:

1. Click the **Users** link on the top menu.
2. On the left navigation under Tools, click **Add User**.
   Edit User Information window displays in the right pane.
3. On the Edit User Information window, type a **Last Name**, **First Name**, **Username/ID**, and **Password**.
4. Leave the check box for Enterprise Portal Access deselected or clear.
5. Click **Save**.
6. Once you have added an Enterprise User, see:
   - Assigning a Location to a User
   - Assigning a Role to a User

To assign a Location to a User:

1. Click the **Users** link on the top menu.
2. On the left navigation under Menu, click on the User you want to assign to a Location.
   Edit User Information window for the User you selected displays in the right pane.
3. On the right toolbar, click the **Assign Locations** tab.
   Assign Locations window displays.
4. Select a Folder or leave the default as All.
   Note: If you select a Folder or Sub Folder, the list of Available Locations displays only the Locations in that Folder.
5. Click on the Location name under the **Available** list.
   The name is highlighted.
6. Click the right arrow to move it to the **Assigned** list.
   Location name displays under Assigned list. Location and Roles Information below is updated and the new Location displays.
   Remember: You can use Shift + Click and Ctrl + Click to quickly move multiple Locations from the Available list to the Assigned list.

Assigning a Role to a User:

Depending on the workflow you chose, if you have already established roles, you can use the User-related windows to assign a role to a user. See Adding and Managing Roles.

1. Click the **Users** link on the top menu.
2. On the left navigation Menu, click on the User you want to assign a Role to.
   Edit User Information window for the User you selected displays in the right pane.
   Note: If you have a long list of Users, you can filter the list to last name by clicking the Options tab and using the last name search box. The Menu tab displays and the list is filtered for you.
3. On the right toolbar, click the **Assign Roles** tab.
   Roles window displays.
4. Click on the Role you want to assign under the **Available** list.
   The name is highlighted.
   Note: Only roles that have already been created display under the Role section. Each User should have one role.
5. Click the right arrow to move it to the **Assigned** list.
   Role displays under Assigned list and Privileges display below, i.e., the check boxes that are selected for that Role.

Adding an Enterprise & Location User

1. Click the **User** link on the top menu.
2. On the left navigation under Tools, click **Add User**.
   Edit User Information window displays in the right pane.
3. On the Edit User Information window, type a **Last Name**, **First Name**, **Username/ID**, and **Password**.
4. Select the check box for Enterprise Portal Access.
5. If Folders are being used in your Organization, select the Top Folder.
6. Click **Save**.
7. On the right toolbar, click the **Assign Roles** tab.
   Roles window displays.

8. Select the Location: Enterprise and click on the **Available** Role you want to assign. Click the right arrow to move it to the **Assigned** list.
9. Select the Location: Location Default Access or a specific Location. Click on the **Available** Role you want to assign. Click the right arrow to move it to the **Assigned** list. Location Default Access will assign the same role to the user in each location they have been assigned to.
   Note: The User must be assigned to one or more Locations in the Locations section.

Deleting a User Account

1. Click the **Users** link on the top menu.
2. On the left navigation under Menu, click on the User you want to delete.
3. Click on **Edit**.
   Edit User Information window displays.
4. Scroll down and click [Delete].

Adding and Managing Roles

Use the Roles section to establish Enterprise Role privileges and Location Role privileges and assign them to a User. It does not matter which you set up first, roles or users. Once you have established roles, you can assign Roles to Users from either section. They take effect the next time a User logs in. Included are:

- Adding an Enterprise Role — establish roles that apply to Users with responsibility for the entire Enterprise.
- Adding a Location Role — establish roles that apply to one or more Locations.
- Assigning a Role to a User — assign one or more Roles to a User.

Refer to the following How To's.

To add an Enterprise Role:

1. Click the **Roles** link on the top menu.
2. On the left navigation under Tools, click **Add Enterprise Role**.
   Edit Role Information window displays in the right pane.
3. On the Edit Role Information window, type a role **Name**, i.e., Full Access.
   Note: Each organization must have at least one Enterprise Administrator with Full Access, i.e., all privileges are selected and the User assigned to this role has full system responsibility and capability. Only a few highly trained Users should be assigned this role in any organization. ScheduleSource will not modify role privileges, only the organization Enterprise Administrator can perform this function.
4. Click on a category. Role privileges display. Select the check boxes of the privileges that you want enabled in this role.
   To select all privileges, click **Select**.
   To deselect all check boxes, click **Clear**.
5. Click each category and select privileges.
   Example: You might create a role for a Human Resources user to have Enterprise-wide privileges for Employees. Create a role named Enterprise Employee, select the Employees category, select all check boxes, and click Save.
6. Click **Save**.
7. To assign a role to a User, see assigning a Role to a User.

To add a Location Role:

1. Click the **Roles** link on the top menu.
2. On the left navigation under Tools, click **Add Location Role**.
   Edit Role Information window displays in the right pane.
3. On the Edit Role Information window, type a role **Name**, i.e., Full Scheduler.
   Note: We recommend that each organization have at least one Location Role for Full Scheduler access, i.e., all privileges are selected and the User assigned to this role has full location responsibility and capability. Only a few Users are assigned this role in any organization.
4. Click on a category. Role privileges display. Select the check boxes of the privileges that you want enabled in this role.
   To select all privileges, click **Select**.
   To deselect all check boxes, click **Clear**.
5. Click each category and select privileges.
   Example: You might create a role for a Human Resources user to have Location-wide privileges for Employees. Create a role named Location Employee, select the Employees category, select all check boxes, and click Save.
6. Click **Save**.
7. To assign a role to a User, see assigning a Role to a User.

To assign a Role to a User:

1. Click the **Roles** link on the top menu.
2. On the left navigation under Tools, click on the role you want to assign to a User.
   Edit Role Information window for the role you selected displays in the right pane.
3. On the right toolbar, click the **Assign Users** tab.
   Assign Users to Role window displays.
4. Click on the User name under the **Available** list.
   The name is highlighted.
5. Click the right arrow to move it to the **Assigned** list.
   User name displays under Assigned list and Privileges display below, i.e., the check boxes that are selected for that Role.

Adding and Managing Organization Folders

Use the Organization section to set up your organization into folders that reflect its hierarchical structure. While this is an optional feature, it provides you with a way of restricting what data Enterprise portal users see and are allowed to work with. This applies only to the Enterprise Portal.

If an organization needs to give regional or state managers access to data from only the locations within their region, then folders would be used. The Organization section includes:

- Adding a Folder — divide your organization into logical divisions or folders
- Adding a Sub Folder — establish sub folders.
- Assigning Locations to a Folder — assign locations to folders

Refer to the following How To's.

To add a Folder:

1. Click the **Organization** link on the top menu.
2. On the left navigation under Tools, click **Add Folder**.
   Add New Folder window displays in the right pane.
3. On the Add New Folder window, type a **Name**.
4. Click **Save**. Click Refresh to see the entry in the left navigation under folders.
   The Edit Folder window displays.
   Note: This is a Parent folder. There aren't any folders under it.
5. Once you have added a Folder, you can add a sub folder or begin adding locations. See:
   - Adding a Sub Folder
   - Assigning Locations to a Folder

To add a Sub Folder:

1. Click the **Organization** link on the top menu.
2. On the left navigation under Folders, click on the Folder you would like to add a Sub Folder to. If you have just added the folder, it is already highlighted.
   Edit Folder window displays in the right pane.
3. Click the **Add Sub Folder** link.
   Add New Folder window displays.
4. Type the **Name**. Notice that the Parent Folder is highlighted.
5. Click **Save**.
   The Sub Folder now displays under the Parent Folder.

To assign Locations to a Folder:

1. Click the **Organization** link on the top menu.
2. On the left navigation under Folders, click on the Folder or Sub Folder you would like to add a Location to.
   Edit Folder window displays in the right pane.
3. Under Locations, highlight the **Available** location (s) and click **Add**.
   The location names display under Assigned.
4. Click **Save**.
   Note: Once a Location is assigned to a Folder or Sub Folder, it automatically displays on the Edit Location Information form. It is also no longer available to be assigned to another Folder.

Chapter 4 – Admin Section

Admin Section Overview

Use the Admin section of the Enterprise portal to administer TeamWork for your organization. There are several links that provide access to a variety of administrative windows. They are:

- Enterprise Folder — review your Service agreement, configure your Enterprise settings, establish your time zone, set system operations and password criteria, and review system usage.
- Custom Fields Folder — establish custom fields to use in the following areas of TeamWork: Enterprise, Location, User, Station, and Employee. While custom fields are defined and controlled in the Enterprise portal, they can be viewed in the Location portal.
- Lists Folder — define values that display as drop-down lists describing reasons actions are taken. Also included are definitions of Special Days and Special Day Types.
- Security Folder — review a timestamp log of any IP address that is locked due to a security breach, i.e., too many failed attempts to log on. As an Enterprise administrator, you control whether or not to unlock the IP address. Password Administration information is also provided.

Enterprise Folder Overview

Use the Enterprise folder in the Admin section of the Enterprise portal to review your Service agreement, configure Settings, configure the Enterprise System, and review system Usage. See the following sections for more information.

- Reviewing the Enterprise Service Agreement
- Configuring Enterprise Settings
- Configuring the Enterprise System
- Reviewing System Usage

Reviewing the Service Agreement

Use the Service link in the Admin section of the Enterprise portal to review the Service Agreement between your organization and ScheduleSource, Inc.

To review the Service Agreement:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Enterprise, click **Service.**
   Service Agreement displays in the right pane.
3. Scroll down to the end of the file to read the complete agreement.
4. Use the Print link to print the agreement or save it to a PDF printer.

Configuring Enterprise Settings

Use the Settings link in the Admin section of the Enterprise portal to configure and review the Enterprise portal name and time zone settings.

To configure Enterprise Settings:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Enterprise, click **Settings.**
   Settings window displays in the right pane.
3. Verify **Name** is correct or make changes. This is the name that appears in the top left corner of the Enterprise portal.
4. Verify the Code. This is the account code used to logon to the Enterprise portal.
   Note: To change the Code, please contact ScheduleSource Support. See Opening a New Support Case.
5. **Logo Url**. If you would like the organization Logo displayed on your log on page, please contact ScheduleSource Support. See Opening a New Support Case.
6. Select the **Time Zone** from the drop-down list. This is the time zone that data is displayed in when you are logged into the Enterprise portal.
7. Select the **Dictionary** from the drop-down list. Standard is the default.
8. If your organization creates Enterprise custom fields, they display in this window.
9. Click **Save**.

Configuring the Enterprise System

Use the System link in the Admin section of the Enterprise portal to configure the system. Enterprise settings, Extended Scheduling, and System Features windows are available. See:

- Configuring the Enterprise Window
- Reviewing the Extended Scheduling Window
- Reviewing the System Features Window

Refer to the following How To's.

Configuring the Enterprise System Window

The Enterprise System window affects how TeamWork functions system-wide. Although this window is configured at the Enterprise portal, the settings affect all Locations.

To configure the Enterprise window:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Enterprise, click **System.**
   System window displays in the right pane.
3. Click the **Enterprise** tab.
   System window displays for Enterprise window.
4. Make desired selections and click **Save**.
   Review the following table. It contains a description of configuration details.

Field	Description	Settings
Enterprise Skills	Employee assignment to stations by location	**Off** - The location can assign employees to any station they have. **Enabled** - A location skill can only be assigned if the employee has been given a master skill at that station by the enterprise.
Directed Swaps	Pertains to Swap Board functionality	**Enabled** - Turns on directed swaps at **<u>all</u>** locations. Allows employees to direct a swap to one employee of their choice. **Off** - Posted swap shifts are available to all employees and can't be 'directed' to one employee.
Limit Availability	Pertains only to Enterprise Scheduling Not applicable in the Core Scheduling Package	**Off** - Employees are eligible to pick up Enterprise Swap Board shifts for any hours. **Enforce Business Hours** - Employee ability to pick up shifts from the Enterprise Swap Board is limited to business hours entered in the Location Settings/Weekdays page.
First Day of Week	Pertains to Add Schedules for the start day of the schedules	The first day of the schedule for the locations. This is enforced if the location is not given the right to change this in the Location Editing tab under Weekday Settings.
Leave Management	Pertains to how time off is entered	**Ad-Hoc** - Core subscription use of Admin/Leave section. **Managed Leave** – custom module subscription required.
Forecast Management	Pertains to types of forecast available. Used only if the Forecast module is activated.	**Advanced** - Data Feeds, Time Series, and Headcount Plans are available. **Simple** - Only the Data Feeds feature is available.
Show Open Shifts on Swap Board	Pertains to posted shifts on the Swap Board.	**All** - All empty shifts in a 'published' schedule will be automatically posted on the swap board **Only Swapped Shifts** - Only shifts posted by employees for swapping will be on the swap board.

Field	Description	Settings
Employees Clockings	Pertains to where Employees are allowed to Clock on. Used only if Time & Attendance Module is activated.	**All Deployed** - Allows Employees to Clock on to all individual locations to which they are assigned. **Only default** - Allows Employees to Clock on to only their primary default location.
Employees Time Approval	Pertains to whether or not Employees are required to approve their timesheet, both time clock and time card entries. Used only if the Time & Attendance module is activated.	**No** - Employee does not approve their time card. **Enabled** - Requires employees to 'approve' the time entries, both clocking and admin entries on their timecard.
Enforce Time Error Review	Pertains to whether or not Time Errors must be reviewed and whether or not errors must be fixed. Used only if the Time & Attendance module is activated.	**Yes** - Requires location to review and fix all time entries with ERROR status (correct time entry or void) before the pay period can be approved. **No** - No required review by location manager.
Automatic Time Sheet Creation	Pertains to the Pay Period. Used only if the Time & Attendance module is activated.	**Yes** - Enables hourly auto run where timesheets are automatically updated per rules; including creating timesheet for new employees. **No** - Timesheets are updated when manually with 'Update Timesheet's link.
Kiosk Badge Field	Pertains to the Time Kiosk. Used only if the Time & Attendance module is activated.	Choose the field that the Kiosk window reads to clock employees on and off. Available fields are ExternalID, UsernameID, BadgeID, BioID, or IandVRPin.
Custom Short Date Format	Pertains to using a short date	Text box - enter date format If left blank, data displays in U.S. format: mm/dd/yy
Custom Time Format	Pertains to using a time format. Used only if the Time & Attendance module is activated.	Text box - enter time format If left blank, data displays in U.S. format: am and pm.
Public Pages for Locations	Generates a URL link to view published schedules and a link to iCal formatted data.	**No** - Locations do not get the ability to the URL link. Yes allows the URL link and you choose employee name type to be shown. **Yes** - Nickname (If none then First Name) **Yes** - Full Name **Yes** - First Name and First Letter of Last Name **Yes** - First Name

Field	Description	Settings
Public Pages for Employees	Generates a URL link to view their own published schedules	**Yes** - Employees see a new tab in the Profile section to create a URL and a Link to iCal formatted data.

For information on Passwords, see Managing Passwords. For information on the Time & Attendance module, see Part II Overview of Additional Modules.

Reviewing the Extended Scheduling Window

The Extended Scheduling window is a custom module used for scheduling more than a 7-day schedule. It is not used in most Enterprise portals. To activate this custom module, contact ScheduleSource Support. See Opening a New Support Case.

Reviewing the System Features Window

This is a read-only window that displays your ScheduleSource TeamWork subscription features. The Core Scheduling Package includes Location Scheduling, Auditing, Collaboration, and sometimes Forecasting. You may add additional modules that are shown in the list. If those modules are not active in your account, the related fields display as Off.

To review the settings in the System Features window:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Enterprise, click **System.**
   System window displays in the right pane.
3. Click the **System Features** tab.
   System window displays for System Features window. These are the features that are enabled in your account for the subscription purchased.
4. To add additional modules to your subscription, contact ScheduleSource Support. See Opening a New Support Case.

Reviewing System Usage

Use the Usage link in the Admin section of the Enterprise portal to review system usage. Daily counts display the number of active users. Also included is a Billing Estimate, and if your organization is using Folders, details display for each Folder.

To review system Usage:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Enterprise, click **Usage.**
   Usage window displays in the right pane.
3. Scroll down to the end of the file to review all usage details.
4. To see the daily usage for any month, click on the blue link of the month. Billing is based on the average number of active employees for each month.

Custom Fields Folder Overview

Introduction

Use the Custom Fields folder in the Admin section of the Enterprise portal to create custom data entry fields for tracking additional data that is useful for your organization. You can create open entry fields or drop-down list fields. This additional information is viewable both within the section it is created for and in reports. Refer to the following for a list of the specific selections where you can build Custom Fields.

- **Enterprise** — Enterprise Custom Fields display in the Admin > Settings window.
- **Location** — Location Custom Fields display in the Locations > Edit window.
- **User** — User Custom Fields display in the Users > Edit window.
- **Station** — Station Custom Fields display in the Stations > Edit window.
- **Employee** — Employee Custom Fields display in the Employees > Edit window.

How To's for Custom Fields

The following How To's explain creating and managing Custom Fields. Regardless of which section you use, the procedure for adding, editing, and deleting custom fields in the same.

- Adding Custom Fields
- Editing Custom Fields
- Deleting Custom Fields

Refer to the following How To's.

To add Custom Fields:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Custom Fields, click on the type of Custom Field you would like to create, i.e., Employee.
   Custom Fields window displays in the right pane with Employee designated in the title.
3. Type the **Name** of the Custom Field. This is the name that displays on the window, i.e., Work Status.
4. To create a drop-down list of choices, type the **Values** that will display in a drop-down list for this Custom Field, i.e., Full-time and Part-time (for the Work Status Custom Field).
5. To create an entry text box, do not enter anything in the Values section.
   Explanation: The custom field will display in the section it was created for on the edit window. For example, when you create an employee custom field, it displays on each Employee Edit window. This is where you enter the field information for that employee.
6. Click **Save**.
   Note: You can have up to six Custom Fields for each section, i.e., six additional custom fields can display on a window. You can have as many values as desired within a 4,000 character limit for each Custom Field.

To edit Custom Fields:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Custom Fields, click on the type of Custom Field you would like to edit, i.e., Employee.
   Custom Fields window displays in the right pane with Employee designated in the title.
3. In the custom fields tab menu, click on the Custom Field title you would like to edit.
   Custom Field window displays.
4. Make desired changes to the **Name**.
5. Click **CLEAR VALUES** to clear all values or edit the values you would like to change.
6. Click **Save**.

To delete Custom Fields:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Custom Fields, click on the type of Custom Field you would like to delete, i.e., Employee.
   Custom Fields window displays in the right pane with Employee designated in the title.
3. In the custom fields tab menu, click on the Custom Field title you would like to delete.
   Custom Field window displays.
4. Click **DELETE**.
   Pop-up window displays question: Delete this User Defined Field? (All saved data will be cleared as well.)
5. Click **OK**.
   Note: ALL DATA will be lost for this Custom Field. Both the Custom Field and the information gathered in conjunction with its use are deleted.

Using Custom Fields in Reports

Refer to Reports for more information on using Custom Fields in Reports.

Lists Folder Overview

Use the Lists folder in the Admin section of the Enterprise portal to enter a variety of lists. These lists must be entered and maintained in the Enterprise portal, and they are used in the Employee and Locations portals.

Lists you can develop include:

- Establishing Special Days and Special Day Types, and then using them in Holiday Calendars.
- Specifying Leave Types and Time Accrual Types so that Employees select a type of leave when filling out a Leave Request.
- Setting up Shift and Time Reasons so you can manage shift changes.
- Establishing Accounting Id's to work with external payroll and accounting systems. If you want to download data from TeamWork to external systems, contact ScheduleSource Support to make this work smoothly. See Opening a New Support Case.

The following How To's guide you in creating the Admin Lists:

- Special Days

- Special Day Types
- Leave Types
- Time Accrual Types
- Shift Reasons
- Accounting Id's

Note: There are several lists that are not used with Part I Core Scheduling Package. They are used with Additional Modules. See Part II Overview of Additional Modules for more information. These lists include:

- Employee Agreements and Employee Positions are used in conjunction with the Policy Management module.
- Time Reasons are used in conjunction with the Time & Attendance module.

Special Days

Use the Special Days link under the Lists folder to define Special Days. These are days that your organization determines are different than a normal work day. Examples include:

- A bank holiday when some of your organization is closed.
- A religious holiday when scheduled leave is allowed.
- A blackout day when leave requests are not allowed.

When you add Special Days in the Enterprise portal, they are used in schedules at the Location portal. In addition, each Location can add Special Days for that are specific to that Location.

To add a Special Day:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click **Special Days.**
   Special Days window displays in the right pane.
3. Click the **Add** link.
   Special Days window expands to include entry fields.
4. Select the **Starting** date, i.e., the Special Day.
5. Type the **Duration** in days.
6. Type the **Name**, i.e., Orientation. You may define several days during an orientation time period as Leave Blackout days because you need everyone to report to work during those days.
7. Select **Type**: Allow Schedule or No Schedule as well as any Special Day Types you have specified. See Special Day Types.
8. If no Leave can be scheduled during this Special Day, select the **Leave Blackout** check box.
9. Click **Save**.
   Note: You cannot edit a Special Day, but you can delete it.

To delete a Special Day:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Special Days.**
   Special Days window displays in the right pane. Special Days are listed.
3. Click on the **x** under the Delete column.
   Pop-up window prompts: Delete special days starting on: x date?

4. Click **OK**.

Special Day Types

Use the Special Day Types link under the Lists folder to define Special Day Types. These allow you to:

- Identify days that have special criteria
- Color-code days for display in the Location schedule.
- Specify days to allow schedule or no schedule
- Specify leave blackout days

To add a Special Day Type:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click **Special Day Types.**
   Special Day Types window displays in the right pane.
3. Type the **Name**.
4. Type a **Description**. This will display in a summary list.
5. Type a **Color**. Use the drop-down color selector. This adds a color-coded header line to the schedule on this day.
6. Click **Save**.
   The Special Day Type displays in the Special Day Types window.
   Note: You cannot edit a Special Day Type, but you can delete it.

To delete a Special Day Type:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Special Day Types.**
   Special Day Types window displays in the right pane. Special Day Types are listed.
3. Click on the **x** under the Delete column.
   Pop-up window prompts: Delete this type? (If special days exist of this type it will NOT be deleted.)
4. Click **OK**.
   Note: To use Holiday Calendars, the Policy Management module must be activated. See Part II Additional Modules.

Leave Types

Use the Leave Types link under the Lists folder to define Leave Types. When you enter Leave Types, Employees are required to select a type of leave when filling out a Leave Request. Leave Types are also required to enforce blackout days entered using Special Days.

To add a Leave Type:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click **Leave Types.**
   Leave Types window displays in the right pane.
3. Click the **Add New Leave Type** link.
   Edit Leave Type window displays.

4. Type the **Code**. This displays in the Enterprise and Location portals.
5. Type the **Name**. This displays in the Employees window as a drop-down list of choices. Also displays in Location portal on Employee Days Off Summary Chart.
6. Leave External Code blank. Used to integrate with other systems.
7. If desired, select **Project/Task**.
8. If desired, select **Accrual Type**.
9. If desired, select **Sch Hours** (to count as Scheduled Hours for maximum hours limit settings) and/or to make as **Blackout** (no Leave allowed).
   Note: In order for Blackout dates to be enforced, the day must also be entered in Special Days. However, you may choose different blackout options depending on the type of leave. For example, blackout might be enforced for requesting Vacation Leave, but not enforced for requesting Jury Duty Leave.
10. Click **Save**.

To edit a Leave Type:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Leave Types.**
   Leave Types window displays in the right pane.
3. Click on the name of the Leave Type you would like to edit.
   Edit Leave Type window displays.
4. Make the changes you would like to make.
5. Click **Save**.

To delete a Leave Type:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Leave Types.**
   Leave Types window displays in the right pane.
3. Click on the name of the Leave Type you would like to delete.
   Edit Leave Type window displays.
4. Click [DELETE].
   Pop-up window prompts: Delete this leave type? (If entries exist with this type, it will NOT be deleted.)
5. Click **OK**.

Time Accrual Types

Use the Time Accrual Types link under the Lists folder to define time types you can use when Employees request Leave Types. For example, most organizations provide for both paid and unpaid leave. So, you can set up a Time Accrual Type of paid and unpaid and apply them to a Leave Type. Employees are required to select a type of leave when filling out a Leave Request. See Leave Types.

Time Accrual Type lists are also used with the Time & Attendance module. See Part II Overview of Additional Modules.

To add a Time Accrual Type:

1. Click the **Admin** link on the top menu.

2. On the left navigation under the Lists folder, click **Time Accrual Types.**
   Accrual Types window displays in the right pane.
3. Click the **Add New Accrual Type** link.
   Edit Accrual Type window displays.
4. Type the **Name**. This displays in the Leave Types window as a drop-down list of choices under Accrual Type.
5. Leave External Id blank unless you are coordinating with an external system.
6. Type a **Description** of the Accrual Type such as Paid Time Off or Unpaid Time Off.
7. Click **Save**.
   The Time Accrual Type now displays in the Edit Leave Type window and is available for selection.

To edit a Time Accrual Type:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Time Accrual Types.**
   Accrual Types window displays in the right pane.
3. Click on the name of the Accrual Type you would like to edit.
   Edit Accrual Type window displays.
4. Make the changes you would like to make.
5. Click **Save**.

To delete a Time Accrual Type:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Time Accrual Types.**
   Accrual Types window displays in the right pane.
3. Click on the name of the Accrual Type you would like to delete.
   Edit Accrual Type window displays.
4. Click [DELETE].
   Pop-up window prompts: Delete this accrual type?
5. Click **OK**.

Shift Reasons

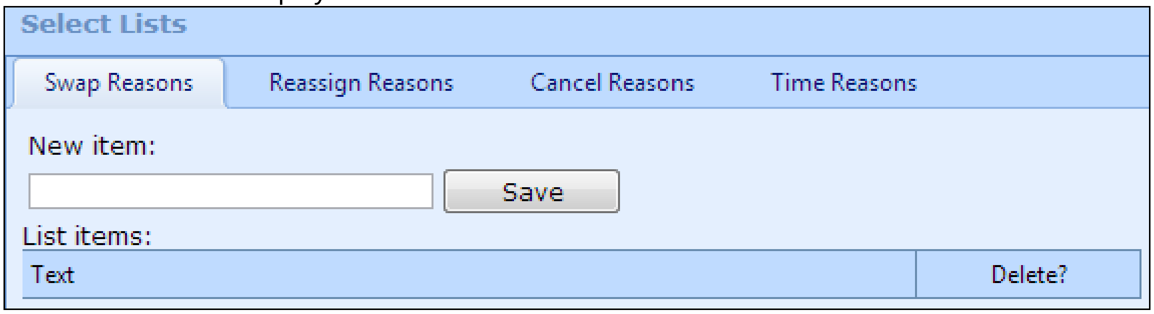
Use the Reasons links under the Lists folder to create a list of reasons that document why actions occur. There are three reason-related links for shifts. They are:

- Shift Swap Reasons
- Shift Reassign Reasons
- Shift Cancel Reasons

You can access each Reason list from the same window. Use the following procedure for adding and deleting reasons. A Shift Reasons Uses table describes reasons, requirements, and results. It is located below the procedures. Time Reasons are used with the Time & Attendance module. See Part II Overview of Additional Modules for more information.

To add a Reason:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click the Reason link**.**
   Select Lists window displays with a tab for each of the reasons.



3. Type the name of a **New item**. This is the name of the reason.
4. Click **Save**.
   Note: You cannot edit a Reason in a list, but you can delete it.

To delete a Reason:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click the Reason link**.**
   Select Lists window displays with a tab for each of the reasons.
3. Click on the **x** under the Delete column.
   Pop-up window prompts: Delete this item?
4. Click **OK**.

Shift Reasons Uses

Reason Type	Where Used	Required to be Used if Created	Results
Shift Swap Reasons	Employee uses when placing a shift on the Swap Board	Yes	Reason is required when employee is posting a shift to Swap Board. Reason is visible in the Location portal n the individual Shift History on the Edit pop-up in the Schedule section. While it is not visible on the summary tab for Shift audit trail history, it is visible on the Location portal Swap Board. Does not show in Employee portal on the Swap Board. In Reports, the reason is retained only if the shift is actually swapped.

Reason Type	Where Used	Required to be Used if Created	Results
Shift Reassign Reasons	Creates a drop-down list for Location portal Scheduler use	No	Is used by Scheduler when manually reassigning a shift to a different employee to show why it was reassigned. If used, is part of the History audit trail on the individual shift. Is also able to be viewed and filtered on in Reports > Designs.
Shift Cancel Reasons	Scheduler uses on Edit Shift window to Inactivate the shift	Yes	Shift displays as grayed out (Inactive) on Schedule in Location and Employee portals Audit history (Edit shift/Status tab) shows timestamp & user of all inactive and reactivated actions. Shift can be enable/reactivate at any time (Edit Shift/Status tab). Reports: Column “inactive code” shows 1=inactive/cancelled or 0=active shift.

Accounting Id's

Use the Accounting Id's link under the Lists folder to enter External Cost Accounting Id's.

Note: If you want to download data from TeamWork to external systems, contact ScheduleSource Support to make this work smoothly. See Opening a New Support Case.

To add Accounting Id's:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click **Accounting Id's**.
   External Cost Accounting Id's window displays in the right pane.
3. Type the name of a **New item**. Enter the Id as an Integer.
4. Click **Save**.
   Note: You cannot edit an External Cost Accounting Id, but you can delete it.

To delete External Cost Accounting Id's:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click **Accounting Id's**.
   External Cost Accounting Id's window displays in the right pane. Names of External Cost Accounting Id's are listed.
3. Click on the **x** under the Delete column.
   Pop-up window prompts: Delete accounting id?
4. Click **OK**.

Security Folder Overview

Use the Security folder in the Admin section of the Enterprise portal to control access for IP Address Blocking that has occurred due to excessive logon failed attempts. You may also want to consider the options you have available for password support. See:

- IP Address Blocking
- Managing Passwords

IP Address Blocking

When a User or Employee has 20 failed login attempts in 15 minutes, the IP address of that computer is blocked by ScheduleSource. No one will be able to log on from that computer unless the IP address is unblocked by an organization Enterprise Administrator. Y (indicating yes) displays under the Enforce column. As an Enterprise Administrator, you can choose to unblock the IP Address.

To unblock the IP Address:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Security, click **IP Address Blocking.**
   Security: Lockout List window displays in the right pane.
3. To unblock an IP address, click the **Y** under the Enforce column next to the IP Address you'd like to unblock.
   The Y turns to a N indicating you are not enforcing the IP Address blocking.

Managing Passwords

When you set up a User and Employee account, you enter a password for that User or Employee account. We encourage recipients of new accounts to change that password.

We recommend that you use the following Password guidelines:

- At least 6 characters in length
- A mixture of letters and numbers
- Not a variation of the user name

You may perform the following password tasks.

- Setting Password Management Criteria — This is where you can set Password Management criteria.
- Changing Passwords — This is where you can change your password or another User's password.

To set Password Management Criteria:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Enterprise, click **System.**
   System window displays in the right pane.
3. Scroll down to Password Management and select **Enabled**.
4. Choose one or more of the following management criteria.

5. Type the number of days a password should **Expire after**.
6. Select whether or not **NO repeats** are **Off** or **Enabled**.
7. Select whether or not **Complexity** is **Off** or **Enabled**. If enabled, refer to the following guidelines:
    - At least eight (8) characters long
    - Contains both letters and numbers
    - Not a variation of your username
8. Click **Save**.

To change Passwords:

1. Click either the **Users** or the **Employees** link on the top menu.
2. On the left navigation, click on the User or Employee whose password you would like to change.
   Edit Information window displays in the right pane.
3. Click the Password [Change] link.
   Change Password window displays.
4. On the Change Password window, type the New Password and Repeat New Password in the text boxes and click **Save**.
5. Test the new password by logging off and logging in using the new password.
6. If an Employee or User forgets their password but remembers other logon information, have them click the link on the logon page to reset their password:
   Forgot Your Password?

Chapter 5 – Collaboration Section

Collaboration Section Overview

Use the Collaboration section to post events to an organizational calendar, create and distribute messages and alerts to the message board, set up email notifications you want to receive from the Enterprise portal, and build a survey to distribute to employees using the feedback loop.

The following How To's help you use Collaboration features:

- Creating Events
- Creating Messages and Alerts
- Creating Notifications
- Creating Feedback and Using Surveys

Creating Events

Use the Events section to add an Event to the organizational calendar, share that Event, and then broadcast (send an email) that Event to other users and employees. You can also use this section to edit an Event you have previously created. Included are:

- Adding an Event — add an event to the organizational calendar.
- Editing an Event — edit an event in the organizational calendar.
- Deleting an Event — delete an event in the organizational calendar.

Refer to the following How To's.

To add an Event:

1. Click **Events** on the top menu in the Collaboration group.
   Calendar displays. You can adjust the display for Day, Week, Month, or Next 14 Days.
2. Click on a date or time to add an Event. You can also click on the **Add Event** link.
   Add Event window displays. **Properties** tab is active and displays a window for adding Event information.
3. Select **Dates** and **Times**.
4. Type a **Title** for the Event.
5. Type **Notes** as desired. They display when a cursor hovers over the Event name on the calendar.
6. Click **Save**. This places the event on only Your calendar.
   Event window displays with tabs for Sharing and Broadcast.
7. Click the **Sharing** tab if you want to place the even on User or Employee Calendars.
   Sharing for the Event window displays.

8. Select **Scope:** Folders, Locations, or Individuals.
   Note: If you select a Folder or Location, the message is delivered to everyone in that Folder or Location. If you select Individuals, choose one or more Users, Employees, or both as the Target.
9. Select **Target:** Users and/or Employees. If Employees, you may also specify an Employee.
   Note: To display all of your Employees, enter a **%** in the last name search box and click **Search**.
10. Move Users and/or Employees names from Target to Shares by highlighting the names and using the down arrow keys. To remove from the Shares list, use the Up arrow key.
    Note: Use Click and Shift + Click to highlight multiple User or Employee names.
11. Click **Save**.
12. Click the **Broadcast** tab if you want to send an email to the Target people the event was Shared with.
    Broadcast information for the Event window displays.
13. Click **Broadcast Now** showing how many emails were sent.
    Summary of Broadcast message results displays.

To edit an Event:

1. Click **Events** on the top menu in the Collaboration group.
   Calendar displays.
2. Click on the Event you would like to edit. You can only edit events that you created.
   Event window displays.
3. Make the changes you would like to make.
4. Click **Save**.

To delete an Event:

1. Click **Events** on the top menu in the Collaboration group.
   Calendar displays.
2. Click on the Event you would like to delete. You need to have been the event creator to delete the event.
   Event window displays.
3. Click **Delete**.

Creating Messages and Alerts

Use the Messages section to create and send out a Message or Alert. You can also use this section to edit or delete a message you have created. Included are:

- Adding a Message — add a message to the message board.
- Editing a Message — edit a message you added to the message board.
- Deleting a Message — delete a message you added to the message board.

Refer to the following How To's.

To add a Message:

1. Click **Messages** on the top menu in the Collaboration group.
   Messages window displays Recent and All Messages and Alerts.
2. Click **Add Message** to add a message to the message board.
   Add Message window displays. **Properties** tab is active and displays a window for adding Message information.

3. Select **Effective** dates. First text box is when message first displays and second text box is the last day the message displays.
4. Type a **Title** for the Message.
5. Type **Text**. It displays as part of the message.
6. Select **Options**:
   - **Is Alert!** - to signify that the message is an alert
   - **Allow Replies** - to allow message recipients to reply to you about the message. All replies will be listed with a timestamp.
   - **Enabled** - message must be enabled to be displayed. You can disable the message, to save it for future use.
7. Click **Save**.
   Message window displays with new tabs for Sharing and Broadcast of the posted message.
8. Click the **Sharing** tab, if you want to share the message.
   Sharing Message window displays.
9. Select **Scope:** Folders, Locations, or Individuals.
   Note: If you select a Folder or Location, the message is delivered to everyone in that Folder or Location. If you select an Individual, you must identify one or more employee names as a Target.
10. Select **Target:** Users and/or Employees. If Employees, you may also specify an Employee.
    Note: To display all of your Users or Employees, enter a **%** and click **Search**.
11. Move Users and/or Employees names from Target to Shares by highlighting the names and using the arrow keys.
    Note: Use Click and Shift + Click to highlight multiple User or Employee names.
12. Click **Save**.
13. Click the **Broadcast** tab.
    Broadcast information for the Message window displays.
14. Click **Broadcast Now**.
    Summary of Broadcast message results displays.

To edit a Message:

1. Click **Messages** on the top menu in the Collaboration group.
   Messages window displays Recent and All Messages and Alerts.
2. Click on the Message or Alert you would like to edit. You need to have been the message creator to edit a message.
   Message Edit window displays.
3. Make the changes you would like to make.
4. Click **Save**.

To delete a Message:

1. Click **Messages** on the top menu in the Collaboration group.
   Messages window displays Recent and All Messages and Alerts.
2. Click on the Message or Alert you would like to delete. You need to have been the message creator to delete a message.
   Message Edit window displays.
3. Click **Delete**.

Creating Notifications

Use the Notifications section to request that an email Notification be sent to you indicating when new Calendar Events, Schedules, or the Swap Board are available. You can also use this section to set up User and Employee Notifications and employee privileges for sending messages and notifications. In addition, use this section to delete a Notification you have created. Included are:

- Adding a Notification Profile for Yourself — add a notification profile to your account.
- Viewing or Setting Up User/Employee Notifications — set up notifications for Users and/or Employees.
- Enabling Collaboration Settings — enable collaboration settings for Users and/or Employees.
- Deleting a Notification Profile — delete a notification profile.

Refer to the following How To's.

To add a Notification Profile for Yourself:

1. Click **Notifications** on the top menu in the Collaboration group. Click on the **My Settings** tab. My Settings window displays.
2. Click on **Add**. Add Profile window displays.
3. Select either Global (includes notifications relating to all Locations) or use the Add Profile window to select only the locations you've been deployed to that you want to get Notifications from. **Note:** Hold the CTRL key down and click on items to select multiple Locations.
4. Select Daily Report criteria. This includes:
    - **Enabled:** YES - Send me emails according to pattern below or No - Never send me a daily report.
    - **On:** specific days you want to receive a report
    - **Include:** specific items to report on such as Calendar, Schedule, or Swap Board
    - **For next:** time period to receive the notifications
5. **Instant Alerts:** select check boxes of events that should trigger an instant email notification.
6. **To:** your email address. This field is automatically populated from what is entered in your User Profile. It must be a valid email address for emails to be delivered.
7. Click **Save**.

To view or set up User/Employee Notifications:

1. Click **Notifications** on the top menu in the Collaboration group. My Settings window displays.
2. Click on **Administration**. Administration window displays User/Employee and Settings.
3. If Folders are being used, select the **Folder** to list only the Users/Employees deployed in that Folder.
4. Select check boxes to display **Users** and/or **Employees** and click **Load**. Lists of Users and Employees display.
5. Click on the Employee or User name to view any current profile that the Employee or User has set up.

6. To add a profile for Users and Employees, click on the User and Employee names and click Profile: **Add**.
   Add Profile window displays.
7. Select the profile you want to add to the Users and Employees and click **Add**.
   Profile displays under Settings.
8. Complete the Setup information as you did for your own profile. It is added to the Users and Employees you selected.
9. Click **Save**.

To enable Collaboration Settings

1. Click **Notifications** on the top menu in the Collaboration group.
   My Settings window displays.
2. Click on **Settings**.
   Collaboration Settings window displays Employee Privileges.
3. To enable employees to share messages and notifications with each other, select the check box: **Share with employees**.
4. To enable users to share messages and notifications with users, select the check box: **Share with users**.
5. Click **Save**.

To delete a Notification Profile

1. Click **Notifications** on the top menu in the Collaboration group.
   My Settings window displays.
2. Click on the profile you would like to delete.
   Setup window displays for that profile.
3. Click **Delete**.

Creating Feedback and Using Surveys

Use the Feedback section to add a Survey and gather feedback from your employees. It can also be used to collect data that you need to compile totals for, such as a weekly order of supplies.

- Adding a Survey — construct a new Survey and add questions or survey items to it.
- Reviewing Survey Results — review either a summary or the detailed results of the Survey questions or survey items as they come in.
- Adding a Survey Result — add a result for a Scheduler or Employee who is unable to respond to the survey.

To add a Survey:

1. Click **Feedback** on the top menu in the Collaboration group.
   Surveys window displays.
2. Click **Add Survey**.
   Survey Design - Add New window displays.
3. Type the **Name** of the Survey.
4. Type **Header Help**. For example, you might give instructions on filling out the survey, i.e., select the best day for the holiday party.

5. Type **Footer Help**.
6. Select check boxes to provide **Access**: Schedulers and/or Employees. They receive the survey.
7. Select **Timestamp**: automatic (real time log) or manual (date/time entered). If manual, survey recipient has to enter a date.
8. Select **Options**: Link to Employee and Allow Comments
   Explanation: Link to Employee - records the employee internal id when they respond to the survey. Allow Comments - allows comments in addition to choosing a multiple choice answer.
9. Select **Enabled** to post the Survey so it is active and can be used.
10. Click **Save**.
    Items entry area displays below Survey.
11. Click **Add** to add a Survey Item, i.e., a question.
    Survey Item window displays.
12. Type **Name** and **Sort** displays automatically. You can change the order if desired.
13. Select **Type** of survey item using the drop-down list.
    Explanation: If you choose Single or Multi Select values, use the Select Values box to enter the value choices recipients will select from. You enter one value per line.
14. Type any additional **Help** instructions.
15. Select **Required** (if recipient must complete the Survey) and **Enabled** (so the Survey Item can be active and used).
16. Repeat for previous steps for as many Survey Items as you desire and when done, click **Save**.
    Note: The Survey is delivered to Scheduler and/or Employee accounts in the TeamWork portal they log in to. To complete the Survey, recipients log in to their accounts, select the Feedback link, complete the Survey, and click Save. The results return to your Enterprise portal account and display under Results Summary.

To review Survey Results

1. Click **Feedback** on the top menu in the Collaboration group.
   Surveys window displays.
2. Click the Survey Name for which you would like to review results.
   Survey Design - name of selected Survey displays in Survey window.
3. To review a summary of results, click **Results Summary**.
   Survey name displays on top of window with responses to survey items lists as well as counts, % response and overall % of survey completion.
4. To review the details of each recipient, click the Results Details.
   Results Details window displays with timestamp, Employee/Scheduler name, survey name, and comments for each recipient.

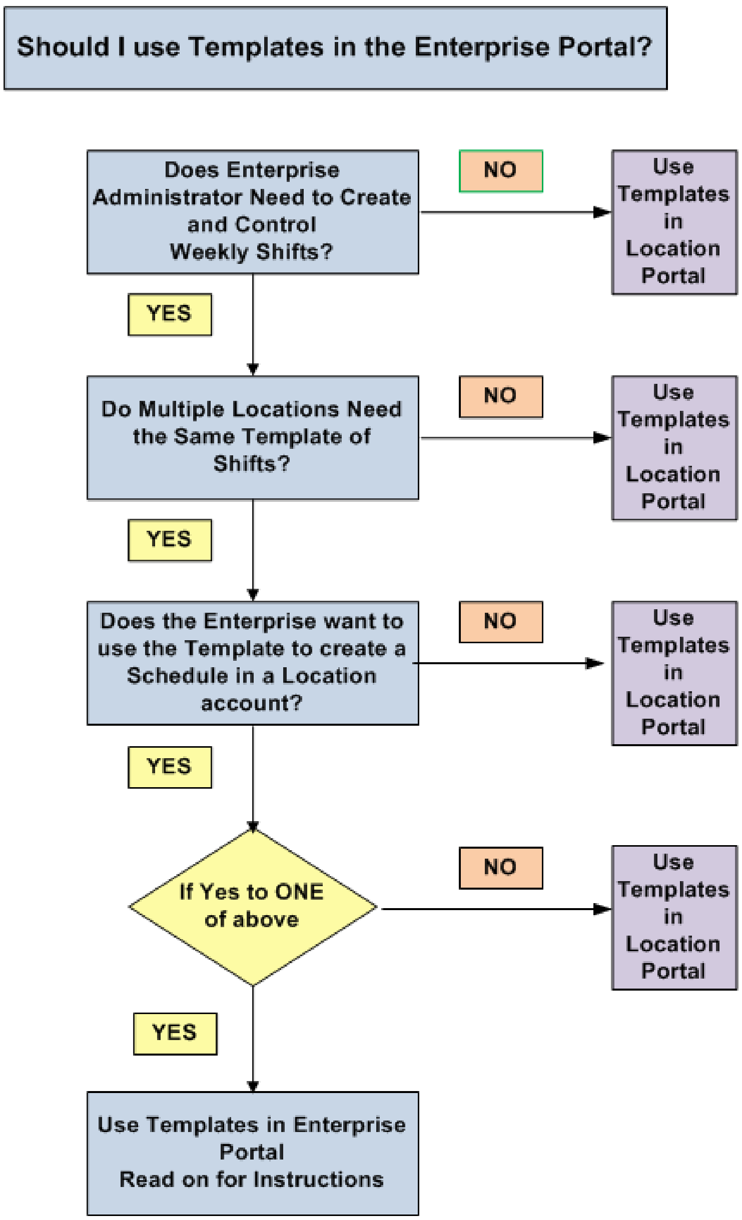
To add a Survey Result

1. Click **Feedback** on the top menu in the Collaboration group.
   Surveys window displays.
2. Click the Survey Name for which you would like to add a survey result to.
   Survey Design - name of selected Survey displays in Survey window.
3. Click **Add Result**.
   Survey displays with a list of Employees and Survey Values.
4. Select the name of the Employee whose result you are adding and select the Survey Value.
5. Click **Save**.

Chapter 6 – Templates Section

Templates Section Overview

Use the Templates section to expedite the creation and control of weekly shifts throughout all locations in your organization. Since you can and should create templates for a specific location in the Location portal, we recommend using the Enterprise portal ONLY when the following criteria are present.



Once a template is created in the Enterprise portal, the Enterprise portal maintains control over it. You can also quickly edit multiple template shifts using the mass update option.

Locations cannot edit the template, but they can use the template to add shifts to any schedule in the Location portal. If the location uses the template and adds shifts to their schedule, they can edit the shifts in the schedule.

Important: If you cannot answer yes to ONE of the previous questions, skip this section. It is more efficient to create Templates in the Location portal. Furthermore, Templates that are specific to only one location should always be created in that location in the Location portal.

Workflow for Templates

Use some or all of the following workflow when you create and edit templates in the Enterprise portal.

- Create a template and share it for use in one or more locations.
- Add shifts to a template and enable them so they can be used in multiple locations and schedules.
- Use the mass update option to quickly view and edit multiple template shifts.
- Review coverage and view totals for stations and totals for employees.

Guidelines for Working with Templates and Shifts

The following guidelines apply to working with templates and shifts. From the Enterprise portal, you can edit a template and the shifts in it many times and in different ways. You are able to do the following:

- Add or delete a location that a template is deployed to. When you save the change, the results display in the corresponding Location portal, i.e., the template displays or no longer displays in the Location portal in that location.
- Enable shifts, disable shifts, and re-enable shifts. Only shifts that are enabled are available for use in schedules in the Location portal. When a shift is disabled, it is grayed out. This gives you and ability to temporarily disable and shift and then re-enable it again as needed.
- Add or delete the location you specify in a particular shift. When you specify a location in a shift, that shift is only available in the location you selected.
- Add or delete stations in a particular shift. When you specify a station in a shift, the shift is only available in locations that include that station.

For How To's on creating and working with templates, see:

- Creating a Template
- Adding a Shift
- Using Filters to View Shifts
- Reviewing Coverage
- Viewing Totals for Stations
- Viewing Totals for Employees
- Creating Schedules

- Editing a Shift
- Using Mass Update
- Deleting Shifts

Creating a Template

Use the Templates section to create a template, specify a group folder if desired, and choose locations to deploy it to. Use the Add New tool to begin creating a template.

To create a Template:

1. Click the **Templates** link on the top menu.
2. On the left navigation under the Standard folder, click **Add New.**
   Standard template window displays in the right pane.
3. (Optional) On the templates window, type a Group name if you want the template placed in a folder with a name. This helps you collect a series of related templates into one folder.
4. On the templates window, type a **Name**. This is the name of a template.
5. Select Publishing Options. They are:
   To limit the locations: Select **Yes - Shift deployment limited (to list below)** and highlight the specific locations you would like the shift deployed to.
   To deploy to all locations: Select **No - Shifts can be deployed anywhere**.
6. Click **Save**.
   The template displays in the Location portal under Templates > Enterprise in the locations you deployed it to.
   Note: Remember that you control the template in the Enterprise portal. To change or add a location, go to Template > Settings. If you do not see the name of the template you created, click the Refresh icon.
7. Once you have created and saved a template, see:
   - Adding a Shift
   - Using Filters to View Shifts
   - Reviewing Coverage
   - Viewing Totals for Stations
   - Viewing Totals for Employees
   - Creating Schedules

Adding a Shift

Once you have created a template, you use the Shifts link to add shifts to it.

To add Shifts to a template:

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template you would like to add a Shift to.
   Standard template window displays in the right pane.

3. Click **Shifts** on the right toolbar. Select List, Week, or Day. If you have just added a new template, the shifts tab already displays.
   Shifts window displays. Additional toolbar selections display on right toolbar: Add Shifts, Create Breaks, and Selected.
4. Click **Add Shifts**.
   Add Shift(s) window displays.
5. On the Add Shift(s) window, type the number of **Shifts (heads) per day**. This is the number of employees required to work the shift each day.
6. Select the times for this **Shift**. If desired, add Break start and end times.
   Note: Break times reduce the total number of hours of the scheduled shift. An 8 a.m. to 5 p.m. shift is 9 hours, but inserting an hour lunch break reduces the number of hours in the schedule to 8 hours.
7. Select **Location** (if shift is to be used in only one location).
   Note: If you select one Location for this shift, then the shifts can only be filled in that one location. If you do not specify a location, the shift can be used in other locations.
8. Select one **Station** for this shift.
   Note: When you select a station, the shift can only be used in locations that have this station assigned to it.
9. Type **Notes** as desired.
   Explanation: Notes display in the Note column of the shift and employees see the note when the shift is published in a schedule.
10. The **Enabled** check box is selected by default. This allows the shift to be placed in the template and used for scheduling in the Location portal.
    Note: If not enabled, the shift displays as grayed out in both the Enterprise and Location portals. When the Location portal uses the template to add shifts to a schedule, the disabled shift does not display in the weekly schedule.
    Remember: You can return to the shift list at any time and disable or re-enable shifts. You can go to either the Edit Shift menu or use the mass update feature.
11. Click **Save**.
    The shift now displays as part of the template in the Location portal. Remember that the location must have the stations assigned to it if they are designated in the shift. Refer to the following example.

Locations	Assigned Positions	Location Templates Include Shifts for…
Location 1	Managers and Supervisors	Managers and Supervisors
Location 2	Only Managers	Only Managers

Once you have added Shifts, see:

- Using Filters to View Shifts
- Reviewing Coverage
- Viewing Totals for Stations
- Viewing Totals for Employees
- Creating Schedules

- Editing a Shift
- Using Mass Update
- Deleting Shifts

Using Filters to View Shifts

Use filters to look at specific shift. This helps you quickly hone in on specific shifts and view the shift details you are interested in.

To use filters to view shifts:

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template name you would like to review.
3. On the left navigation, click on the **Options** tab.
4. Choose one or more filters from the drop-down lists. For example, you may view all shifts for Friday at a particular station.
5. Click **Appl**y.
   FILTER settings display under right toolbar and shifts display based on the filters you entered.
   Note: If you are not already in the Shifts window, select the Shifts tab. To clear the filter settings, select the default settings

Reviewing Coverage

Use the Coverage tab to review how well your Template and Shifts cover the necessary time periods.

To review Coverage

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template name you would like to review.
3. Click the **Coverage** link on right toolbar.
   The number of shifts are listed by day, station, and hour. The shifts in the template are highlighted in green.

Viewing Totals for Stations

Use the Totals tab to view shift totals for stations.

To view Totals for Stations:

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template name for which you would like to view Totals.
3. Click the **Totals** link on right toolbar.
   Totals display.
4. Click the **Hours** or **Shifts** tab.
   The number of shifts displays for each day, each station, as well as a cumulative total.

Viewing Totals for Employees

Use the Totals tab to view shift totals for employees.

To view Totals for Employees:

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template name for which you would like to view Totals.
3. Click the **Totals** link on right toolbar.
   Totals display.
4. Click the **Options** tab.
   Option categories display.
5. Select the employee from the drop-down list.
   Right pane refreshes and displays totals for the Employee selected.
6. Click the **Hours** or **Shifts** tab.
   The number of shifts displays for each day, each station, as well as a cumulative total.
7. To remove the employee from the filter (right pane display), on the **Options** tab, clear the employee name.
8. Click **Apply**.

Creating Schedules

Use the Deploy link to identify the locations that should use the template and shifts to create schedules. When you click the Create Schedules button, the template is sent to the locations you select. The shifts that are enabled can be used in the Location portal to create a new schedule.

To Create Schedules:

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template name you would like to use to create a new schedule.
3. Click the **Deploy** link on right toolbar.
   Deploy window displays listing the locations this Template has already been deployed to.
4. Select the check boxes of the locations you would like to build a new schedule in using this Template.
5. Type the schedule name and click **Create Schedules**.
   Note: If you put the name Enterprise as part of the schedule name, the Location portal scheduler can identify that this schedule was built from the Enterprise portal.

   Explanation: Once you click the Create Schedules button, schedules are created for the selected locations and the window updates showing the number of Enterprise-built schedules placed in each location. The Schedules column shows the number of schedules sent, Shifts column shows the number of shifts sent, and Hours displays a total number of hours.

   Important: This Template with shifts now displays in the Location portal in the Templates section of the locations selected. The location can use the Template to create a schedule, but cannot edit the Template. To view, log into the Location portal and click Templates. The schedule displays under the date with the schedule name you gave it.

Editing One Shift

Use the Shift tab to edit **one** shift. If you are making the same changes to multiple shifts, you use the Shifts > Selected tab and use the Mass Update function. See Using Mass Update.

To Edit One Shift:

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template name with the Shift you would like to edit.
3. Click the **Shifts** link on right toolbar. Select to display them by List, Week, or Day.
   Template and Shifts display.
4. To edit one shift, click on the Start time of the shift.
   Edit Shift window displays.
5. On the Edit Shift window, make changes.
6. Click **Save**.

Using Mass Update

Use the Selected link to update shift fields or clear breaks from selected shifts. Mass Update allows you to quickly make changes to day, shift, break, station, note, and whether or not a shift is enabled.

To use Mass Update:

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template with the shifts you would like to Update.
3. Click **Shifts**. Select to display them by List, Week, or Day.
4. To Update Shifts, select the check boxes of the Shifts you would like Update. Use Selected > Toggle All to select all of them.
5. Once Shifts are selected, click **Selected > Update**.
   Mass Update window displays.
6. Specify the fields you want to update by selecting the corresponding check box under the Select column..
   Check boxes under Select display a check for the fields you are updating.
7. Enter the new information in the shift Fields for the field boxes.
8. Click **Update**.
   Shift displays with updated information.
9. To Clear Breaks, select the check boxes of the Shifts you would like to Clear Breaks from. Use Selected > Toggle All to select all of them.
10. Once Shifts are selected, click **Selected > Clear Breaks**.
    Prompt displays: Clear breaks from selected shifts?
11. Click **OK**.

Deleting Shifts

Once you have created a template and added shifts, you can select the shifts you would like to delete and use Selected > Delete to delete specific shifts. You can also use Toggle All > Delete to delete them all.

To Delete Shifts:

1. Click the **Templates** link on the top menu.
2. On the left navigation under Menu > Standard, click on the Template name with shifts you would like to Delete.
3. Click **Shifts**. Select to display them by List, Week, or Day.
4. To Delete Shifts, select the check boxes of the Shifts you would like Delete. Use Selected > Toggle All to select all of them.
5. Once Shifts are selected, click **Selected > Delete**.
   Prompt displays: Delete all selected shifts?
6. Click **OK**.

Chapter 7 – Local Section

Local Section Overview

Use the Local section of the Enterprise portal to see Location Schedule totals and the Swap Board shifts. Use Auto-Fill to fill empty shifts by Location. To see detailed shift information, log in to the Location portal for the location you are interested in.

Included in this section are:

- List Schedules — display Location schedule summary data for the number of shifts and hours totals for each Location schedule. To see detailed shift information, go to the Location portal.
- Swap Board — display the Swap Board for the next 7 days including the number of shifts that are currently empty.
- Auto-Fill — display the results of Auto-Fill including the number of shifts, hours, empty shifts, and hours of shifts that are not filled. Execute Auto-Fill to assign empty shifts to Location schedules.

Reviewing Schedules

Use the Schedules section under Local to display schedules across locations.

To display schedules:

1. Click on the **Local** link on the top menu.
2. On the left navigation under Menu > Tools, click **List Schedules**.
   Local Schedules window displays in the right pane.
3. On the Local Schedules window, use the left and right arrow keys to scroll through previous and future dates you would like to display.
   Dates display for all Locations.
4. Click on the table headers to change display from ascending to descending and vice versa.

Reviewing the Swap Board

Use the Swap Board section under Local to display Swap Board activity across locations for the next seven days. Included are the date, day, station, shift start and end times, group, hours and current status as well as an indication of new swaps.

To display schedules:

1. Click on the **Local** link on the top menu.
2. On the left navigation under Menu > Tools, click **Swap Board**.
   Swap Board - Next 7 Days window displays in the right pane.

3. On the Swap Board - Next 7 Days window, change column locations using drag and drop.
   Column headers display in desired location.

Reviewing and Executing Auto-Fill

Use the Auto-Fill section under Local to view shift information from locations schedules. Included are location, schedule, the number of shifts, the number of hours, empty shifts, and hours of shifts that are not filled. You can select the location and execute auto-fill on empty shifts.

To display Auto-Fill shifts:

1. Click on the **Local** link on the top menu.
2. On the left navigation under Menu > Tools, click **Auto-Fill**.
   Auto-Fill window displays in the right pane.
3. On the Auto-Fill window, use the left and right arrow keys to scroll through previous and future dates you would like to display.
   Auto-Fill activity displays for all Locations.
4. Click on the table headers to change display from ascending to descending and vice versa.

To execute Auto-Fill:

1. Click on the **Local** link on the top menu.
2. On the left navigation under Menu > Tools, click **Auto-Fill**.
   Auto-Fill window displays in the right pane.
3. On the Auto-Fill window, select the check box of the shift that has empty shifts, and click **Execute Auto-Fill**.
   Auto-Fill assigns shifts that can be filled and updates the Auto-Fill screen to reflect the filled shifts.

Chapter 8 – Reports Section

Reports Section Overview

Use the Reports section to organize your Enterprise data using a variety of summary, detail, and fixed reports. The Reports section provides two types of reports: fixed reports that ScheduleSource loaded into your account and reports you create using your Enterprise portal data. Reports developed in the Enterprise portal can be shared with locations in the Location portal.

Summary of Report Functionality

Once you enter organizational data into your account, you can:

- Develop user-defined custom fields and include custom field data in reports
- Create new values based on other values in the report, and use "if" statement logic
- Use report packages to view organization, employee, scheduling, and time-related data
- Run reports on a scheduled basis and automatically email reports to users and locations
- Set up reports to be delivered only when an alert exists
- Apply filters to each report column and use common filtering mechanisms
- Multi-select columns and add criteria to build reports quickly
- Use the designs provided for location, employee, employee skills, and schedule shift data
- Use the charts provided to graphically see location, employee, employee skills, and scheduling template data
- Change the display of chart data simply by clicking on a chart type: bar, column, line, and pie
- Use fixed reports to view summarized scheduling data related to headcounts and a month view

Note: The Reports section contains new and improved functionality. Take some time to learn the new features as outlined in these How To's.

See Also

- Understanding Report Designs
- Report Resources
- Report How To's

Understanding Report Designs

ScheduleSource provides a flexible report design interface. You can use the design window to view many different types of information and combinations of data. While this is an ad hoc tool that you can configure to address a specific need or purpose, it is also a tool that allows you to plan, build, schedule, distribute, and manipulate report data so that it provides a view into every aspect of your organization. You can also share report designs from the Enterprise portal with the Location portal by selecting the check box for: Shared with Locations. The following provides an understanding of:

- Creating a Design to Build a Report
- Understanding the Columns and Group / Sort Windows
- Understanding the Properties Window
- Understanding Crosstab Reports
- Using Data Sources in Reports
- Requesting Assistance

Creating a Design to Build a Report

Begin building a report by thinking about the information you would like to pull. Let's look at a simple example of learning how many shifts you have at each location and the total number of hours. To build a report for this example:

- Go to **Designs** and click the **Add** button. Settings display and you must give this report a name. You can always change it later, but for now, it may help you focus on the information you are pulling. In this example, let's call it **Hours by Location**.
- Identify the Source from which you are going to pull data. In this example, we scroll through the drop-down list to Scheduling, and select **Schedule Shifts**. Remember, we want to know how many shifts we have at each location and the total number of hours we have scheduled. See Data Sources and Data Fields.
- Select the Type of report. You can select Crosstab or List. In this example, let's keep it simple and select **List**. Remember to Save your report. Then, you can add information under Columns. For more information on using the Type: Crosstab, see Understanding Crosstab Reports.
- If you are going to make this report available in the Location portal, select the check box **Shared with Locations**. If you check this box, the report displays in the Location portal for all locations. Click **Save**.
- Under Columns, you identify the field names of the data you are pulling. This tells the report what information you want to display. Click Add and a window displays with the selections from the data source you identified in the initial settings. Let's click **Add** and select **BusinessName**. **Explanation:** When you set up your Enterprise portal information, you added the names of all your locations. BusinessName is the field that holds the name information. And when you started designing this report, you selected Schedule Shifts as the data source. BusinessName is a field that is included in the data. See Data Sources for a complete list of fields available.
- Since our example is pulling information by Location, it would be more convenient to have that column named Location. To do this, click on BusinessName and the Properties window displays. You use this window to change the name to **Location**. Remember to **Save** this information. **Explanation:** Notice that the name changes to Location on your Columns window, although the original field name [BusinessName] still displays in brackets.

- Under Columns, let's continue to identify report information we want to pull. These are the header names that display across the top of the report. Click **Add** and a window displays with the selections from the data source we identified. In this example, we want to find the field names that indicate how many **shifts** we have and total hours or **hours scheduled**.
  Note: ScheduleSource provides us with calculated fields that contain automatic formulas. Scroll down the window to the fields identified with a gear. This gear indicates it is a calculated field. By the field names ShiftCount and HoursTotal, we see that these fields are being summed.
- Let's select **ShiftCount** and **HoursTotal** and click **Add**. Since they both have the gear icon in front of them, we know they display summarized data. Remember, we can easily rename them if that makes it easier to read the report. Click on the field name to display the Properties window and give it a new name. Let's change the names to **Shifts** and **Hours** and **Save** the information.
  Note: By default, values display in the table on the left. If it is easier to read another way, you can use the Properties window to change how values display, i.e., centered or right-justified.
- We can view the way this report looks at any time in the design process. Click **Save** and click **View**. If it is not what we are looking for, or if we would like to make changes and additions, simply do so, and click Save and View again. From the View window, we can make many additional changes. See Viewing a Report and Creating Report Filters.
- We can even select more information for this report. Let's add the station. From the View window, click **Edit** to return to the Design Settings window. Under Columns, click **Add**, select the **StationName**, and click **Add**. Change StationName to Station using the Properties window.
  Note: Notice that there are check boxes selected next to each of the fields in the Column list. When there is a check, it means we want to display that data. If we clear the check box from a field, the information does not display on the report.
- Now, let's tell the report how to Group or Sort the information on the report. Under Group / Sort, click **Add**. Since we are asking for Hours by Location and we've added Station, let's group the information by StationName. We can change the name from StationName to **Station** again using the Properties window if that makes the report easier to read. We can also tell it to list or Sort the Stations in Ascending or Descending order. Let's choose Ascending. Click **Save**.
  Explanation: Notice that the name changes to Station on your Group / Sort window, although the original field name still displays in brackets. ASC is appended to the name to indicate that the order is ascending.
- Once again, we can view the way this report looks by clicking **Save** and then **View**. Ensure there are check boxes next to all the fields you want displayed.
- Since we're now sorting the report information by Station, we may not want to display it as a heading at the top of the report. So, click **Edit** to return to the Design Settings window. Under Columns, we clear the check box next to Station. When we Save and View the report, it categorizes the information by Station and no longer lists it as a header of the report.

To make changes and additions, simply do so, and click **Save** and **View** again. For more help with reports, see Report How To's. Refer to the Example Design that follows.

Understanding the Columns and Group / Sort Windows

Colunms - When you design a report, you use the Columns window to tell the report what information it should pull. Once you define your data source, use the Columns window to identify the specific fields of information you want listed in the report. In the previous example, we selected fields for BusinessName, HoursTotal, ShiftCount, and Station. HoursTotal and ShiftCount had a gear in front of them, indicating they display summarized data.

Group / Sort - You can use the Group / Sort window to help you group or identify subsets of data within the report. Select the check box to the left of the field name to group the report by that name. In our example, we used Group / Sort to display the Location, Hours, and Shifts by Station.

Configure and reconfigure the report as many times as necessary to ensure you display exactly what it is you are looking for. Make additions, use the arrow keys to move a field up or down in the display, select the check box to group by a field, or use the X key to delete a field. Remember to click Save and then View to view the report.

Understanding the Properties Window

The Properties window provides you with the following capability.

- Renaming a field from a data source so that it displays in a more recognizable, common term. Simply type the new name in the Name text box.
- Specifying the order in which data is sorted and displayed in the Group / Sort window. Choose either ascending or descending.
- Filtering to display less information. Remember to put a specific string of text or dates in single quotes. The filtering information is saved with the report and is useful for items that may not be in generic filters. When you click Save, the reports function tests the syntax you entered and provides an error message in red or an OK in green. Refer to Formula Columns and become familiar with generic filters ScheduleSource provides.
- Tallying functions are available for sum, count, average, minimum, and maximum. You can select to get a running tally, group, or report. You can also provide ways of manipulating data.
- Specifying specific formulas by selecting a column name of f(x) [ ]. When you click on f(x) [ ], the Properties window displays and you can enter specific formulas. Formulas display in the column list and are used by the report. Fields a formula uses must be in the column list so they can be used, but they do not have to be selected for display. See Column Formula Quick Reference. For assistance with developing a formula for a report, open a new support case and send it to ScheduleSource Support. See Opening a New Support Case.

Understanding Crosstab Reports

You design Crosstab reports in much the same way as you design List reports, except that you also specify Crosstab Fields and use the Properties window to further define their properties. These reports show the relationship between the data fields you identified. Generally, the values that display in a Crosstab report are calculated data, and information from the fields you identify is combined in the report.

Using Data Sources in Reports

When you design reports, you can choose between reporting fields that tally data and calculated fields that are statistical in nature. Statistical fields calculate information based on the data you select. Therefore, when you select a calculated field, the report becomes a summary of that data. It is grouped based on the fields you identify as well as the calculations you ask to be performed.

The following examples show how you can use these different fields to display the same data in different ways. Example I shows the difference in results when you select tally fields versus calculated fields. Example II shows the difference in results when you select tally fields versus calculated fields and group / sort to categorize results.

Example I Tally vs. Calculated Field

The following shows the difference between using reporting fields that tally data and a calculated field that counts the information in those fields.

<table>
<tr><th>Reporting Field Design
Tally Function</th><th>Calculated Field Design
Statistical Function</th></tr>
<tr><td>Locations Report for Name, City, and State</td><td>Locations Report for Counting Locations in a State</td></tr>
<tr><td>
<table>
<tr><th>Name</th><th>City</th><th>State</th></tr>
<tr><td>L1</td><td>Denver</td><td>CO</td></tr>
<tr><td>L2</td><td>Golden</td><td>CO</td></tr>
<tr><td>L3</td><td>Westminster</td><td>CO</td></tr>
<tr><td>L4</td><td>Wichita</td><td>KS</td></tr>
<tr><td>L5</td><td>New York</td><td>NY</td></tr>
</table>
</td><td>
<table>
<tr><th>State</th><th>Count</th></tr>
<tr><td>CO</td><td>3</td></tr>
<tr><td>KS</td><td>1</td></tr>
<tr><td>NY</td><td>1</td></tr>
</table>
</td></tr>
</table>

Example II Tally vs. Calculated Field and Group / Sort

The following shows the difference between using tally fields and a calculated field that counts locations and groups results by city.

Reporting Field Design **Tally Fields**	**Calculated Field Design** **Calculated Field and Grouping Function**
Locations Report for Location and City	Locations Report for Location with Count Grouped by City

Location	City
After Hours	Denver
Coffee Shop	Denver
Faculty Lounge	Denver
Ice Cream Shop	Denver
Student Union	Denver
Burrito shop	Golden
Catering Services B	Golden
Coffee Shop B	Golden
Residence Hall A	Golden
Sport Concessions	Golden
Catering Services	Westminster
Dining Services	Westminster
Residence Hall B	Westminster

Location	Count
Denver	
After Hours	1
Coffee Shop	1
Faculty Lounge	1
Ice Cream Shop	1
Student Union	1
	5
Golden	
Burrito shop	1
Catering Services B	1
Coffee Shop B	1
Residence Hall A	1
Sport Concessions	1
	5
Westminster	
Catering Services	1
Dining Services	1
Residence Hall B	1
	3
	13

Requesting Assistance

For assistance with developing a report design, open a new support case and send it to ScheduleSource Support. Explain the data you would like to report on, and a technician can help you develop a design that produces those results.

Report Resources

The TeamWork Learning Center provides extensive report resources for helping you identify the fields that contain the data you are looking for. A quick reference for column formula data and report design examples are also available. Refer to the following.

Data Sources and Data Fields

Reports display under the Data Source used to generate the report. The following are the specific links to the TeamWork Learning Center.

- ScheduleSource Data Sources and Corresponding Data Fields — displays a document that contains data sources and the corresponding data fields.
- Data Sources — displays definitions for the column field choices. When you design reports, you select data sources for: Organization, Employee, Scheduling, and Time and Attendance.

  Note: Data Sources are available for the modules in your subscription. The Core Scheduling Package includes Organization, Employee, and Scheduling Data Sources. If you have purchased the Time & Attendance module, those Time & Attendance Data Sources are also available and are included in the guide for Part II Additional Modules.

Formula Columns

Reports use formula columns to read and manipulate data of other columns. Use adding, subtracting, multiplication, division, and logical operands as well as logic functions and math functions. Refer to Column Formula Quick Reference.

Date Format: Date and Number

Reports allow for custom formatting of dates and numbers. Refer to Formatting Dates and Numbers.

Report How To's

The following How To's help you generate reports from your data in the Enterprise portal. Use these How To's to keep track of how well your organization is operating and meeting your customer's needs. View employee-related data at a glance, and schedule reports to be sent automatically to alert specific individuals when shifts are not being worked as scheduled.

Report How To's include the following:

- Using the Reports Home Page
- Using the Reports Tab
- Using the Report List
- Viewing a Report
- Editing a Report
- Creating Report Filters
- Printing a Report
- Creating Report Designs
- Creating Charts
- Creating Report Styles
- Creating Report Packages
- Deleting a Report

Using the Reports Home Page

When you click the Reports link, reports menu selections display. The Reports section allows you to view data across all locations, employees, scheduling, and time periods. There are easy-to-use report development windows as well as fixed reports.

Access Reports functions from:

- Report menu toolbar
- Sections link on the Reports home page

There are several ways to open existing reports. See:

- Using the Reports Tab
- Using the Report List

Using the Reports Tab

Use the Reports > Reports tab drop-down list to display reports you have created in your account. You can view reports under Organization, Employee, Scheduling, and Time & Attendance. You can also access the reports you designated as Favorites.

To display Reports:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Reports**.
   Reports List drop-down menu displays. Categories include: Favorites, Organization, Employee, Scheduling, and Time & Attendance.
3. Scroll down the list of categories and move your cursor to the right. Choose the report to access from the category sub-menu list.
   The highlighted report displays.

Using the Reports List

Use the Reports > List section to access fixed reports, designed reports, charts created, and packages created in the Enterprise portal.

To view Reports:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **List**.
   Explanation: Reports are listed under the data-source categories: Organization, Employee, Scheduling, and Time.
3. Select one of the following radio button list options to filter the list. Each is explained as follows.

Option	Displays...
All	All reports available in your Enterprise portal. This list includes those that are pre-loaded as well as those you have created. The icon next to the report shows if it is a designed report (letter page) or a fixed report (square with a dot in center), chart, or package.
Packages	Report Packages you created using a report design, filter, and style. You may also have scheduled the report to generate on a timed basis and may have designated subscribers to automatically receive report results.
Designs	Reports that were ScheduleSource designed and pre-loaded or custom reports you designed for your organization. Design options include group / sort properties and specific column properties. You may also select filtering mechanisms, tally functions, and display features. You can make a copy of any of these reports and then edit the copy to create a new report.

Option	Displays...
Charts	Charts that you designed for your organization to display summary data graphically. Chart types include: Bar, Column, Line, and Pie. You select the data source and values for both the X-Series and Y-Series. Options include showing a legend, type of display, and if shared with locations.
Fixed	Fixed reports that have been created by ScheduleSource and pre-loaded: Schedule Headcounts and Schedule Month View. You cannot edit or copy these reports. You can apply filtering, date ranges, grouping, and styles. Group data differently and specify different intervals to meet your organization's reporting needs.

4. Click on the report you would like to view or edit.
   The page refreshes and the report displays.
5. To edit the report, see Editing a Report.
6. To print the report, see Printing a Report.
7. To change the report format, see Creating Report Styles.

Viewing a Report

Use the Reports > Reports tab, the Reports > List tab, or the Recent tab to display a report you have created in your account. You can also view reports from any of the report development tabs: Designs, Charts, Filters, Styles, and Packages.

To view a Report:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Reports**, **List**, or **Recent** and select the report you would like to view.
   Report displays.
3. To edit the report, click **Edit**.
4. To download the report, click **Download** and select the format: Pdf, Csv, Tab, or XML.
5. To designate this report as a Favorite, click the gold star indicating **Favorites**.
6. To display this report with data from the past or future, click the green back or forward **arrow**.
7. To change the display style, click the **Style** tab and select the new style in the Select Style window.
8. To change the data, click the **Filter** tab and select the filter from the Adjust Filter window and enter Dates and Data information. You may also delete a current filter in the window.
9. To change the amount of time the report covers, select **Range** and use the drop-down list to select one of the following: Day, Week, Month, Quarter, or Year.
   Note: When you view the report, this is the time period that displays until you select a different Range.

Editing a Report

Once you have created a report, it is easy to edit it. The following procedures involve editing the different report sections. They include:

- Editing Settings
- Editing Group/Sort
- Managing Columns for Data Displayed

Refer to the following How To's.

To edit Settings:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Reports** or **List** and select the report you would like to edit.
   Report displays.
3. Click **Edit** in the reports toolbar.
   The report displays in an edit mode.
   Note: You can toggle between View and Edit by clicking the **View** button or the **Edit** button on the reports toolbar. This lets you quickly see the results of your edits to a report as you make changes.
4. Under Settings, rename the report by typing the new name and click **Save**.
5. To share it with a location, select the check box for: **Shared with Locations** and click **Save**.
   When the Enterprise report displays in the Location portal, it will only show data related to that location.
   Explanation: If you share with locations, a report is added to the Reports Section for all locations. Users in the Location portal can view the report, but they cannot edit it or delete it. However, they can copy it and edit or delete that copy. Changes made to a copy of the report in one location do not affect the report in other locations nor do they affect the original Enterprise portal report.
6. To copy the report, click **Copy**.
   A copy is added to your left menu list with the name of the report and (copy) appended.
   Hint: This is very useful if you want to make a new report with some additional information in it.
7. To delete a report, see Deleting a Report.

To edit Group/Sort:

1. To add a Group Header to the Report, click **Add**.
   Add Group/Sort window displays.
2. Select the column you want to Group by and click **Add**.
3. Select the check box to the left of that column name to display it in the report. This adds a Group Header using that column data.
4. To change the name of the column, click on the name to display the Properties window.
5. Enter the name to display in the report in the **Name** field and click **Save**.
   New Column name displays under Group/Sort.
6. To add a Sort order to the report, click **Add**.
   Add Group/Sort window displays.
7. Select the column you want to Sort by and click **Add**.
8. To change the name of the column, click on the name to display the Properties window.

9. Enter the name to display in the report in the **Name** field.
10. From the Sort drop-down list, select either Ascending or Descending.
11. Click **Save**.

To manage Columns for data display:

1. To add columns, click **Add**.
   Add Column window displays.
2. Select one or more columns using the drop-down list.
   Remember: You can select multiple columns by holding down the CTRL key as you click on each column name.
3. To delete a column, click on the column name to highlight it. Click the **X**
   Note: When you hover over the X, it displays delete.
4. To reorder columns, click on the column name you want to move to highlight it. Click the up or down arrows to change the order of this column.
5. To change the Properties of a column, double-click on the column.
   Properties window displays.
6. Apply a Filter, set Tally Functions, and change the Display.
7. Click **Save**.
8. To hide a column, clear the check the box to the left of the column name.
   Report displays without this column information.
9. To display the hidden column again, select the check box to the left of the column name.
   Report displays with this column information.

Creating Report Filters

Use the Filters link in the Reports section of the Enterprise portal to create report filters. You can slice and dice your data into many different views. For information on using formula columns, refer to Column Formula Quick Reference.

To create report Filters:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Filters**.
   Charts window displays.
3. Click **Add** or select an existing report Filter.
   Filters window displays.
   Note: If you selected an existing Filter, the values display in the expanded Filters window.
4. Type the **Name** and click **Save**.
   Note: If you selected an existing Filter, you can click **Save As** and use the existing parameters to build a new Filter.
5. Enter the date and date range filter information. You can select days, weeks, months, quarters, and years.
6. To add fields, under **New condition**, use the drop-down list to select the **Field**, i.e., Employees.
   Drop-down list expands to include the records in that category.
7. Select each record.
   Note: Use Click + CTRL+ Click or Click + Shift Click to highlight multiple records. You can also use the Find button to search for a specific record.

8. Click the right arrow to move the records into the Value column.
9. To add conditions, click the **Add Condition** button
10. Click **Save**.
    Values display under Values. You can click Remove to delete them and select other values.
11. To replace the current filter with this, click the **Make Current** button.
12. To delete the filter and start over, click **Delete**.

Printing a Report

Use the Print link in the Reports section of the Enterprise portal to print reports. You can print a report that displays in the right pane at any time. Use the Reports tab or the List tab to display a report. See:

- Using the Reports Tab
- Using the Report List

Refer to the following How To.

To print a Report:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Reports** or **List** and select the report you would like to print.
   Report displays.
3. Click **Reports > Print**.
   Printer screen or browser print window displays. Use preview or browser commands to resize and format the page.
4. Click **Print**.

Creating Report Designs

Use the Designs link in the Reports section of the Enterprise portal to create report designs. You can create reports for many different sections in the Enterprise portal, and you can include the specific fields that help you manage your organization. Use the statistics you have available at your fingertips to ensure that you are optimizing the scheduling and use of your employees against your organization's management needs. For a detailed explanation of using this window, see Understanding Report Designs.

You can design two types of reports: List and Crosstab. Each type of report design has different steps and is addressed in the following How To's.

- Designing a List Report
- Designing a Crosstab Report

Designing a List Report

The following How To outlines the procedure you use to create a List report design.

To create a List report design:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Designs**.
   Designs window displays.

3. Click **Add** or select an existing report Design.
   Settings window displays.
   Note: If you selected an existing Design, the values display in the expanded Designs window.
4. Type a report **Name**.
5. Select the **Source**.
6. Select the **Type**: List
7. Select the check box to **Share with Locations** if this report is to be available in the Location portal.
8. Click **Save**.
   Additional settings display.
9. First, choose the columns for data you want to display. Under Columns, click **Add**.
   Add Column window displays.
10. Select the field to add and click **Add**.
    Note: To select multiple fields, hold down the CTRL key while selecting the fields. Use the arrow keys to move fields up and down.
11. Under Group / Sort, click **Add**.
    Add Group/Sort window displays list of available fields.
12. Select the check box to the left of the field to display the field on a report or clear the check to hide the field when you view the report.
13. To change the name of the column, click on the name to display the Properties window.
14. Define field properties such as the Name, Filter, Tally Functions, and Display.
15. Click **Save**.
16. Next, add a Sort and/or Group header. Under Group / Sort, click **Add**.
    Add Group/Sort window displays list of available fields.
17. Select the field to add and click **Add**.
    Note: To select multiple fields, hold down the CTRL key while selecting the fields. Use the arrow keys to move fields up and down.
18. Select the check box to the left of the field to add a group header to the report.
19. Use the up and down arrows to move the columns in the order you want them to be sorted.
20. To set Properties, click on the field.
    It is highlighted and the Properties window displays.
21. Define field properties such as the Name, Filter, Tally Functions, and Display.
22. Click **Save**.
23. To view the report, click **View**.
    Hint: Remember that you can include or exclude fields by selecting or clearing the check box to the left of the field. The report displays the fields you select.
24. To delete a report Column, highlight the column name and click the **X**.
25. To delete the report, see Deleting a Report.

Designing a Crosstab Report

The following How To outlines the procedure you use to create a Crosstab report design.

To create a Crosstab Report Design:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Designs**.
   Designs window displays.
3. Click **Add** or select an existing report Design.
   Settings window displays.
   Note: If you selected an existing Design, the values display in the expanded Designs window.
4. Type a report **Name**.
5. Select the **Source**.
6. Select the **Type**: Crosstab
7. Select the check box to **Shared with Locations** if this report is to be available in the Location portal.
8. Click **Save**.
   Additional settings display.
9. First, choose the columns for data you want to display. Under Columns, click **Add**.
   Add Column window displays.
10. Select the field to add and click **Add**.
    Note: To select multiple fields, hold down the CTRL key while selecting the fields. Use the arrow keys to move fields up and down.
11. Under Group / Sort, click **Add**.
    Add Group/Sort window displays list of available fields.
12. Select the check box to the left of the field to display the field on a report or clear the check to hide the field when you view the report.
13. To change the name of the column, click on the name to display the Properties window.
14. Define field properties such as the Name, Filter, Tally Functions, and Display.
15. Click **Save**.
16. Next, add a Sort and/or Group header. Under Group / Sort, click **Add**.
    Add Group/Sort window displays list of available fields.
17. Select the field to add and click **Add**.
    Note: To select multiple fields, hold down the CTRL key while selecting the fields. Use the arrow keys to move fields up and down.
18. Select the check box to the left of the field to add a group header to the report.
19. Use the up and down arrows to move the columns in the order you want them to be sorted.
20. To set Properties, click on the field.
    It is highlighted and the Properties window displays.
21. Define field properties such as the Name, Filter, Tally Functions, and Display.
22. Click **Save**.
23. Under Crosstab, click Edit.
    Crosstab Fields window displays.

24. Select **Label** and **Value** fields and click **Save**.
25. To set Properties for Label, click on **Label** to add a Label Name. Select Filter, String, and Display options.
26. Click **Save**.
27. To set Properties for Value, click on **Value** to add a Value Name. Select Filter, Tally Functions, and Display options.
28. Click **Save**.
29. Click **Save.**
30. To view the report, click **View**.
    Hint: Remember that you can include or exclude fields by selecting or clearing the check box to the left of the field. The report displays the fields you select.
31. To delete a report Column, highlight the column name and click the **X**.
32. To delete the report, see Deleting a Report.

Creating Charts

Use the Charts link in the Reports section of the Enterprise portal to create a Chart report. You can select from several different types: Bar, Column, Line, and Pie charts.

Refer to the following How To.

To create a Chart:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Charts**.
   Charts window displays.
3. Click **Add**.
4. Type a chart **Name**.
   Note: You can always edit the name.
5. Select the data **Source**.
   Note: This cannot be changed.
6. Select the **Type** of chart: Bar, Column, Line, or Pie
   Note: You can always edit the Type of chart and display the same data in a different chart. However, when you select a Pie chart, it can only have one X-Series column and one Y-Series column.
7. Choose the **Options**. Select the check box to **Show Legend**, **Show Values**, and if unsorted or data displays in Ascending or Descending order.
   Note: You can always edit the Options.
8. Select the check box to **Shared with Locations** if this report is to be available in the Location portal. Note that the Enterprise chart shared with a location will only show data related to that location.
   Explanation: If you share with locations, this chart is added to the Reports Section for all locations. Users in the Location portal can view the chart, but they cannot edit it or delete it. However, they can copy it and edit or delete that copy. Changes made to a copy of the chart in one location do not affect the chart in other locations nor do they affect the original Enterprise chart.
9. Click **Save**.
   The Chart displays in the in the left menu in a folder automatically created under the data source

you selected. In addition, the window expands to include selections for X-Series and Y-Series Properties.

10. Click **Add** to choose the **X-Series** columns.
    Add X Series window displays.
    Note: These are the grouping fields for calculated data.
11. Select data item to add and click **Add**.
    Data displays in X-Series window.
12. To change the name of the column, click on the name to display the Properties window.
13. Enter the name to display in the chart in the **Name** field and click **Save**.
    Note: If you have more than one column choice, you can select the check box to the left of the name to display it in the report. To hide that column, clear the check box. If this is a Pie Chart, you can only display one X-Series column.
14. Click **Add** to choose **Y-Series** columns.
    Add Y-Series window displays.
    Note: This is the calculated data to display for each X-Series grouping.
15. To change the name of the column, click on the name to display the Properties window.
16. Enter the name to display in the chart in the **Name** field and click **Save**.
    Note: If you have more than one column choice, you can select the check box to the left of to the name to display it in the report. To hide that column data, clear the check box. If this is a Pie Chart, you can only display one Y-Series column.
17. To view the chart, click **View**.
    Chart displays data using the chart type you selected.
18. To change the amount of time the chart displays, select **Range** and use the drop-down list to select one of the following: Day, Week, Month, Quarter, or Year.
    Note: When you view the chart, this is the time period that displays until you select a different Range.
19. To edit a chart, click the **Edit** button. See Editing a Report.
    Remember: You may display the chart using all of the different chart types. You may also copy the chart and edit the copy.
20. To print a chart, see Printing a Report.
21. To delete a chart, see Deleting a Report.

Creating Report Styles

Use the Styles link in the Reports section of the Enterprise portal to create report styles. View the Default style that is loaded and add new styles.

To create report Styles:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Styles**.
   Styles window displays.
3. Click **Add**.
4. Type a Style **Name** and click **Save**.
   The window expands to include Settings, Report fonts, and Data Table design selections as well as an Example of how the report displays with the settings you select.

5. Option for **Shared**. Select No or Yes. This designates whether or not the style is or is not available for use at the Location portal.
6. Option for **Paging**. This specifies whether or there are page breaks if the report is printed. Select the check box if you want page breaks.
7. Select Report **Fonts**. The three font boxes are for the various parts of the report: header, body, and footer.
8. Select **Header** text attributes: size of font and whether bold or normal.
9. Select **Footer** text attributes: size of font and whether bold or normal.
10. Select Data Table information: **Font** size, **Column Headers**, **Group Headers**, and **Table Cells**. Use the color drop-down selection display to select specific colors. The code for your selection is entered in the text box to the left.
11. Click **Save**.
    The Example displays your selections at the bottom of the window.

Creating Report Packages

Use the Reports > Packages section to build custom report packages. Use the Report Designs, Report Filters, and Report Styles you have created and put them together into a single report package.

Refer to the following How To.

To add a report Package:

1. Click the **Reports** link on the top menu.
2. On the toolbar, click **Packages**.
   Packages window displays.
3. On the Packages window, type a **Group** name if you want to create a folder to put the package into. (Optional)
4. Type a **Name**.
5. Type a **Description** if desired. (Optional)
6. Select a report **Design** from the drop-down list.
7. Select a **Filter** from the drop-down list.
8. Select a **Style** from the drop-down list.
9. Click **Save**.
10. Click the **Add** button next to Deliveries to schedule the report to run automatically and have an email sent to the subscribers you choose.
11. On the Package Deliver window, to Schedule the report to run, make sure the **Schedule** tab is selected.
12. Type a report **Name** and select the start and end dates.
    Note: If you do not enter an end date, the report will continue to run indefinitely.
13. Select the **Type**: REPORT: ALWAYS send report or ALERT: Only send if containing data.
14. Select the frequency the report should run: Daily, Weekly, Monthly, Yearly, or Times. Depending on the frequency selected, the Package Deliver refreshes. Enter the additional frequency information requested.

15. Click **Save**.
    Package Delivery window refreshes and a Delete button is added to the Schedule Tab window.
    Note: You may return to this window at any time to delete the report package.
16. Click on the **Subscribers** Tab.
17. Select the scope and recipient. Click **Add**.
    Window refreshes and Report Package information displays the number of subscribers who will receive the package email, the schedule, and next delivery. If it is an alert, that is also noted.
18. To disable a subscriber from receiving the email, select the check box under Select and click the **Toggle Enabled** button. The Yes turns to No in the Enabled column.
19. To delete a recipient, select the check box under Select and click **Delete**.
20. Close the window.
    Schedule and Subscriber information displays on Packages window under Deliveries.
21. To add additional schedules and deliveries, click **Add** next to Deliveries.
22. To add additional Report Packages, click **Add** next to Packages on the top of the window.
23. To edit the report package, see Editing a Report.
    Note: You may copy the report package and edit it. However, the scheduling and subscriber information under Deliveries does not duplicate.
24. To view the report package, see Viewing a Report.
25. To print the report package, see Printing a Report.
26. To delete the report package, see Deleting a Report.

Deleting a Report

Once you have created a report, it is easy to delete it. However, be aware that once it is deleted, you cannot retrieve the report.

To delete a report:

1. Click the **Reports** link on the top menu.
2. Select the report you would like to delete. See Using the Reports Tab or Using the Report List.
3. Click **Delete** to delete the report.
   System prompts you to verify the delete.
4. Click **Yes** or **Cancel** to confirm the delete or cancel the action.
   Caution: If you delete a report, it cannot be retrieved.

References

References Overview

You may find the following references helpful as you design reports and understand the data in your organization. References include:

- Column Formula Quick Reference
- Formatting Dates and Numbers
- Data Sources

Column Formula Quick Reference

Reports use formula columns to read and manipulate data of other columns. Use adding, subtracting, multiplication, division, and logical operands as well as logic functions and math functions. Refer to the following formula quick references.

- Operators
- Logic Function
- Math Functions
- String Functions
- Date Functions

Operators

Name	Symbols
Multiplication, Division, Modulus	*,/,%
Addition, Subtraction	+, -
Logical AND, XOR, OR	&, ^, |

Logic Function

Name	Description	Example
(<condition> ? <true> : <false>)	If condition evaluates to "true", returns <true>, otherwise returns <false>.	(a > b ? a + b : 0)

Math Functions

Name	Description	Example
Abs	Returns absolute value of a specified number.	Abs(x)
Acos	Returns the angle whose cosine is the specified number.	Acos(x)
Asin	Returns the angle whose sine is the specified number.	Asin(x)
Atan	Returns the angle whose tangent is the specified number.	Atan(x)
Atan2	Returns the angle whose tangent is the quotient of two specified numbers.	Atan2(x,y)
Ceiling	Returns the smallest integer greater than or equal to the specified number.	Ceiling(x)
Cos	Returns the cosine of the specified angle.	Cos(x)
Cosh	Returns the hyperbolic cosine of the specified angle.	Cosh(x)
Exp	Returns e raised to the specified power.	Exp(x)
Floor	Returns the largest integer less than or equal to the specified number.	Floor(x)
Remainder	Returns the remainder resulting from the division of a specified number by another specified number.	Remainder(x,y)
Log	Returns the logarithm of a specified number.	Log(x)
Log10	Returns the base 10 logarithm of a specified number.	Log10(x)
Max	Returns the larger of two specified numbers.	Max(x,y)
Min	Returns the smaller of two numbers	Min(x,y)
Pow	Returns a specified number raised to the specified power.	Pow(x,y)

Name	Description	Example
Round	Rounds a value to the nearest integer or specified number of decimal places.	Round(x), Round(x, d)
Sign	Returns a value (-1 or 1) indicating the sign of a number.	Sign(x)
Sin	Returns the sine of the specified angle.	Sin(x)
Sinh	Returns the hyperbolic sine of the specified angle.	Sinh(x)
Sqrt	Returns the square root of a specified number.	Sqrt(x)
Tan	Returns the tangent of the specified angle.	Tan(x)
Tanh	Returns the hyperbolic tangent of the specified angle.	Tanh(x)
Truncate	Calculates the integral part of a number.	Truncate(x)
MaxN	Returns the largest of a set of numbers.	MaxN(x,y,z,a,b,...)
MinN	Returns the smallest of a set of numbers.	MinN(x,y,z,a,b,...)
Avg	Returns the average of a set of numbers.	Avg(x,y,z,a,b,...)
Sum	Returns the sum of a set of numbers.	Sum(x,y,z,a,b,...)
PI	Returns the value of pi.	PI()
E	Returns the value of e.	E()

String Functions

Name	Description	Example	Result
Min	Returns the minimum of two string values.	Min('a', 'b')	a
Max	Returns the maximum of two string values.	Max('y', 'z')	z
MinN	Returns the minimum of n string values.	MinN('a', 'b', 'c')	a
MaxN	Returns the maximum of n string values.	MaxN('x', 'y', 'z')	z

Name	Description	Example	Result
Format	Returns a string with n values inserted and formatted.	Format('I have {0:0.00} hours in {1} shifts', 12, 2)	I have 12.00 hours in 2 shifts
Left	Returns the leftmost number of specified characters.	Left('aaabbbcccdddeeefff',5)	aaabb
Right	Returns the rightmost number of specified characters.	Right('A good thing', 5)	thing
Substring	Extracts a string given a larger one. Uses start index (starts a 0) and length.	Substring('A good thing', 2, 4)	good
Replace	Replaces all occurrences of a string within a string.	Replace('A good thing is good', 'good', 'bad')	A bad thing is bad
Reverse	Reverses a string	Reverse('AbCd')	dCbA
PadLeft	Creates a fixed length string and pads the left with a given character (or space if none specified).	PadLeft('333', 10, 'x')	xxxxxxx333
PadRight	Creates a fixed length string and pads the right with a given character (or space if none specified).	PadRight('444', 5, 'b')	444bb
Trim	Removes leading and trailing whitespace	Trim(' dog ')	dog
ToLower	Converts a string to lowercase characters	ToLower('MY Car')	my car
ToUpper	Converts a string to uppercase characters	ToUpper('some title')	SOME TITLE
Length	Return the number of characters	Length('aaabbb')	6
ToDate	Converts a string to a date	ToDate('6/1/2014 10 PM')	6/1/2014 22:00
Contains	Checks if the second string is contained in the first.	Contains('aaabbbccc', 'bc')	1
		Contains('aaabbbccc', 'R')	0

Name	Description	Example	Result
IsEmpty	Returns true if value is null or zero length, false otherwise.	IsEmpty('')	TRUE
Concat	Appends N strings together.	Concat(55, 33, 'test message')	5533test message

Date Functions

Name	Description	Example	Result
Min	Returns the minimum of two date values.	Min('6/1/04', '6/1/10')	6/1/2004
Max	Returns the maximum of two date values.	Max('6/1/04', '6/1/10')	6/1/2010
MinN	Returns the minimum of n date values.	MinN('6/1/04', '6/1/10','1/1/1970')	1/1/1970
MaxN	Returns the maximum of n date values.	Max('6/1/04', '6/1/10','1/1/1970')	6/1/2010
TotalWeeks	Returns the total (fractional) number of weeks between two dates.	TotalWeeks('6/1/2014', '6/8/2014')	1
		TotalWeeks('6/1/2014', '6/2/2014')	0.142857143
TotalDays	Returns the total (fractional) number of days between two dates.	TotalDays('6/1/2014', '6/8/2014')	7
		TotalDays('6/1/2014', '6/2/2014')	1
		TotalDays('6/1/2014', '6/2/2014 12 PM')	1.5
TotalHours	Returns the total (fractional) number of hours between two dates.	TotalHours('6/1/2014 1 PM', 6/2/2014 11 AM')	22
		TotalHours('6/1/2014 1 PM', 6/1/2014 1:30 PM')	0.5

Name	Description	Example	Result
TotalMinutes	Returns the total (fractional) number of minutes between two dates.	TotalMinutes('6/1/2014 6:01 AM', '6/1/2014 8:30 AM')	149
TotalSeconds	Returns the total (fractional) number of seconds between two dates.	TotalSeconds('6/1/2014 6:01 AM', '6/1/2014 8:30 AM')	8940
DiffYears	Returns the integer difference in calendar years of two dates.	DiffYears('1/1/2014', '7/1/2014')	0
		DiffYears('3/1/2014', '1/1/2015')	1
DiffMonths	Returns the integer difference in calendar months of two dates.	DiffMonths('3/1/2014', '5/15/2014')	2
		DiffMonths('3/1/2014', '1/20/2014')	-2
DiffWeeks	Returns the integer difference in calendar weeks of two dates. Optionally accepts a string indicating the first day of the week. D	DiffWeeks('6/1/2014', '6/5/2014')	0
		DiffWeeks('6/1/2014', '6/8/2014')	1
		DiffWeeks('6/1/2014', '6/5/2014', 'Monday')	1
DiffDays	Returns the integer difference in calendar days of two dates.	DiffDays('6/1/2014', '6/5/2014')	4
		DiffDays('6/1/2014 1 AM', '6/1/2014 11: 30 PM')	0
DiffHours	Returns the integer difference in calendar hours of two dates	DiffHours('6/1/2014 9 AM', '6/1/2014 2: 30 PM')	5
DiffMinutes	Returns the integer difference in calendar minutes of two dates.	DiffMinutes('6/1/2014 9 AM', '6/1/2014 2: 30 PM')	330

Name	Description	Example	Result
DiffSeconds	Returns the integer difference in calendar seconds of two dates.	DiffSeconds('6/1/2014 9 AM', '6/1/2014 2: 30 PM')	19800
AddYears	Add the integer number of years to the given date	AddYears('3/1/14',1)	3/1/2015
AddMonths	Add the integer number of months to the given date.	AddMonths('3/1/14',1)	4/1/2014
AddWeeks	Add the integer number of weeks to the given date.	AddWeeks('3/1/14' 2)	3/15/2015
AddDays	Adds the fractional number of days to the given date.	AddDays('3/1/14' 3)	3/4/2014
		AddDays('3/1/14' 1.5)	3/2/2014 12pm
AddHours	Adds the fractional number of hours to the given date.	AddHours('2/2/14 3 PM', 2.5)	2/2/2014 5:30pm
		AddHours('2/2/14 3 PM', 50)	2/4/2014 5pm
AddMinutes	Adds the fractional number of minutes to the given date.	AddMinutes('4/1/2014 4:45 PM', 30)	4/1/2014 5:15pm
AddSeconds	Adds the fractional number of seconds to the given date.	AddSeconds('4/1/2014 3:30 PM, 60)	4/1/2014 3:31pm
Year	Returns the year of given date.	Year('6/1/2014 1:23:45 PM')	2014
Month	Returns the month of given date.	Year('6/1/2014 1:23:45 PM')	6
Week	Returns the week of the year, based on Sunday start and the first week having at least 4 days in year.	Week('6/1/2014')	23
Day	Returns the day of given date.	Year('6/1/2014 1:23:45 PM')	7
Hour	Returns the hour of given date.	Year('6/1/2014 1:23:45 PM')	13
Minute	Returns the minute of given date.	Year('6/1/2014 1:23:45 PM')	23

Name	Description	Example	Result
Second	Returns the second of given date.	Year('6/1/2014 1:23:45 PM')	45
WeekDay	Returns the an integer for the week day (1-7), Sunday - Saturday	WeekDay('6/8/2014')	1
Now	Returns the current timestamp for local timezone.	Now()	7/1/2014 12:30
UtcNow	Returns the current timestamp for utc timezone.	UtcNow()	7/1/2014 18:30
IsEmpty	Returns true if value is null or zero length, false otherwise.	IsEmpty('')	TRUE

Formatting Dates and Numbers

You can specify the date and number formatting and apply string functions after formatting. Refer to the following specifiers and example outputs.

Date and Number Formatting

A user-specified format string for dates and numbers. Create your custom format string using the specifiers below. Be sure to use date specifiers with date values and numeric specifiers with numeric values.

Date Formatting

Specifier	Type	Example Output
dd	Day	10
ddd	Day abbreviation	Tue
dddd	Full day name	Tuesday
hh	2 digit hour	10
HH	2 digit hour, 24hr format	22
mm	Minute 00-59	38

Specifier	Type	Example Output
MM	Month 01-12	12
MMM	Month appreviation	Dec
MMMM	Full month name	December
tt	AM or PM	PM
yy	Year, 2 digits	02
yyy	Year	2002
:	Separator	hh:mm:ss 10:43:20
/	Separator	dd/MM/yyyy 10/12/2002

Example: hh:mm tt yields 9:28 am or 9:28 pm

Number Formatting

Name	Type	Example	Output (Passed 1340.89)
0	Zero placeholder	00.0000	1340.8900
#	Digit placeholder	(#).##	(1340).89
.	Decimal	0.0	1340.9
,	Thousand separator	0,0	1,300
%	Percent	0%	134089%
e	Exponent placeholder	00e+0	13e+2

String Functions

Optional string functions applied after formatting. If a string function requires parameters (i.e. specifies values in parenthesis) they you must provide the exact number of values in the (inputs) field. String values (str) should be enclosed in quotes ("). Integer values are specified by (int).

String Formatting

Function	Type	Example	Output (Passed AbC123)
Left(int)	Returns the (int) leftmost characters	Left(4)	AbC1
Right(int)	Returns the (int) rightmost characters	Right(2)	23
Replace(str,str)	Replaces all instances of the first string with the second string	Replace("C","-----")	Ab-----12
Substring(int,int)	Returns the substring that starts at the first integer (0 is start of string) with a length of the second integer	Substring(1,3)	bC1
ToUpper()	Converts string to Upper Case characters	ToUpper()	ABC123
ToLower()			
MonthName()	Returns the full month name if passed a integer value 1-12	MonthName()	na

Note: For detailed string functions, see Column Formula Quick Reference and go to String Functions.

Data Sources

Introduction to Data Sources

In every section of TeamWork, there are fields available for reporting. When you design a report, first you select the data source and then you identify the fields to report on. The report design pulls information based on your company records. You set up these records in the Enterprise portal when you establish the organization, location, employee, station, and user records. In some areas, information is added to company records in the Location portal.

Note: When a portal is important, it is noted. Otherwise, most information is initially entered in the Enterprise portal and Scheduling information is entered in the Location portal.

The following lists the major data sources available to you when you design reports. Each section outlines the fields and provides a description of contents available within the data source.

- Organization Data Sources
- Employee Data Sources
- Scheduling Data Sources

Note: Data Sources for Time & Attendance are available with a subscription to the Time & Attendance module. See data sources for Time & Attendance in the Part II Additional Modules guide.

Using Data Sources in Reports

When you design reports, you can choose between reporting fields that tally data and calculated fields that are statistical in nature. The results display the combination of tallied data and calculated fields, based on how you group the information. See Understanding Report Designs and specifically, Using Data Sources in Reports.

Organization Data Sources

The following tables describe the data sources under Organization. Each data source includes a list of the specific fields available to you for reporting purposes. The following provide a brief description of field contents. Data sources include:

- Location
- Station
- Station (Local)

Refer to the following data sources for Organization.

Location

Data available for each location in your organization is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations for more information about using these windows.

Field	Description of contents
Address1	The street address of the location or business site. (*Entered in Address in the Location information window.*)
Address2	Additional information for Address1 (i.e., Suite 202). (*Entered in Address Line 2 in the Location information window.)*
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. (*Entered in Sign In Code field in the Location information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (*Entered in Name in the Location information window.)*
City	The name of the city for the location. (*Entered in City, ST ZIP in the Location information window.*)
Deployed	Yes or No status of whether your location is fully set/up. If deployed, must be Yes - it is fully set up.(*Entered in Deployed in the Location information window.)*
Enabled	ACTIVE or INACTIVE. Indicates whether location is active or inactive. If deployed, must be ACTIVE - Log On Available. (*Entered in Status in the Location information window.)*
LicenseDate	Set by ScheduleSource. (Optional, depending on license agreement.)
Phone	The phone number of the location. (*Entered in Phone in the Location information window.*)
State	The two-letter designation of the state for the location. (*Entered in City, ST ZIP in the Location information window.*)
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
Zip	The zip code of the location. (*Entered in City, ST ZIP in the Location information window.)*
Count	A count of the Locations, grouped by the other fields selected.

Station

Data available for each station in your organization is specified in the Add or Edit Station window. See Stations and Adding and Managing Stations for more information about using these windows.

Field	Description of contents
AllowSwap	Flag that indicates the station allows employees to post to the swapboard. Displays on reports as True if posting is allowed and False if posting is not allowed.
Name	The name of the station. (*Entered in Name in the Station information window.*)
Notes	Additional textual information about the station.
OrgStationExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company coordinates with an external system. (*Entered in External ID field in the Station information window.*)
OrgStationId	Unique ID generated by ScheduleSource.
PayRate	The estimated or average pay rate for the station.
SecurityGroupName	The name of the security group the station is assigned to. Optional. Security Groups are a special feature of roles used to limit editing of shifts.
TimeActivityCode	The code of the default Activity assigned to the station.
TimeActivityName	The name of the default Activity assigned to the station.
TimeProjectCode	The code of the default Project assigned to the station.
TimeProjectName	The name of the default Project assigned to the station.
TimeTaskCode	The code of the default Task assigned to the station.
TimeTaskName	The name of the default Task assigned to the station.
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Station. See Custom Fields Folder Overview.
Count	A count of the Stations, grouped by the other fields selected.

Station (Local)

Data available for each station deployed to location(s). See Stations, Locations, Adding and Managing Stations, and Adding and Managing Locations for more information about using these windows.

Field	Description of contents
AllowSwap	Flag to indicate that the station (local) allows employees to post to the swapboard. Displays on reports as True if posting is allowed and False if posting is not allowed. See Adding a Station.
BusinessCode	The Code that Location users type in when they log on to the Location portal for that location.
BusinessExternalId	The External Id of the Location. It is blank unless your company coordinates with an external system.
BusinessName	The name of the Location that the Station resides in.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
Name	The name in the Station.
Notes	Additional textual information about the station.
OrgStationExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company coordinates with an external system. (*Entered in External ID field in the Station information window.*)
OrgStationId	Unique ID generated by ScheduleSource.
Rank	relative priority of a shift ranked against other shifts. The higher the rank, the more likely the day's shifts will be filled. If empty shifts occur, they will be pushed to the lower priority days. See Adding and Managing Locations, specifically Configuring Location Settings.
StationId	Unique ID generated by ScheduleSource
TimeActivityCode	The code of the default Activity assigned to the station.
TimeActivityName	The name of the default Activity assigned to the station.
TimeProjectCode	The code of the default Project assigned to the station.
TimeProjectName	The name of the default Project assigned to the station.
TimeTaskCode	The code of the default Task assigned to the station.
TimeTaskName	The name of the default Task assigned to the station.

Field	Description of contents
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Station. See Custom Fields Folder Overview.
Count	A count of the Local Stations, grouped by the other fields selected.

Employee Data Sources

The following tables describe the data sources under Employee. They list the fields available and provide a brief description of contents. They include:

- Availability Override
- Availability Template
- Employee
- Employee (Local)
- Employee Accruals
- Employee Credentials
- Employee Leave
- Employee Skills

Refer to the following data sources for Employee.

Availability Override

You can report on data regarding employees who alter or override their normal availability schedule. Reports gather information from the following sources.

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations.
- Employees specify availability information on the Single Day Override window in the Employee Portal.

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.*)

Field	Description of contents
Address2	Additional information for employee address. (*Entered in Address2 in the Employee Information window.*)
AvailableRange	Specific times employee is available or unavailable for assignment (depends on value of EnabledYesNo). (*Employee selects Available Times on Single Day Override window.*)
BusinessName	The name of the location, for local overrides.
City	The city of the employee's address.
Country	The country of the employee's address.
Date	Date of the override.
DayId	Day ID of the date (Sunday - Saturday ~ 1-7).
DayName	Name of weekday for the date.
EMail	Employee's email address.
EmployeeId	Unique ID set by ScheduleSource. Will be unique for each Location/Employee.
Enabled	Flag (0 or 1) to indicate whether the availability is "Off" or "On". If O, the date (or times therein) are set to "Off". If 1, the date/Times are set to "On".
EnabledYesNo	Same as "Enabled" but displays text values "Yes" or "No".
EnterpriseEmployeeId	Unique ID for the employee, set by ScheduleSource.
FirstName	Employee's first name.
FullName	Employee's full name. Displayed as "Last, First".
HireDate	Employee's Start Date.
Hours	Number of hours in the AvailableRange.
LastName	Employee's last name.
Name	Name or type of the Availability Override. Report displays either Global Day Override or Local Day Override.
Notes	Textual notes related to the Employee. (*Entered on Employee Information window.*)
OverridePriority	UNUSED

Field	Description of contents
PhoneNo	Employee's phone number. *(Entered in Phone in Employee Information window*.)
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.
PreferredEnd	End time of Preferred Range. (Overrides default preferred times for a date.)
PreferredStart	Start time of Preferred Range. (Overrides default preferred times for a date.)
ScopeText	Name of override's scope or availability. Report displays either Global or Local.
State	Employee's state. (*from Address settings*.)
TermDate	Termination date of employee. (*Entered in Inactive Date in Employee Status window*.)
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
UserName	Employee's username. (*Entered in Username/ID in Employee Information window*.)
Count	A count of the Availability Overrides, grouped by the other fields selected.
EnabledCount	A count of the Enabled Availability Overrides, grouped by the other fields selected.
TotalHours	A sum of the Availability Overrides Hours, grouped by the other fields selected.

Availability Template

You can report on data regarding employee availability on templates. Depending on your company's administration, data for each employee is entered in either the Location portal or the Employee portal. See the following:

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

- Schedulers enter availability in the Location portal in either a Global or Local template or, if Location Admin settings permit, employees enter their availability themselves on templates in the Employee portal.

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 address. (*Entered in Address in the Employee Information window.*)
Address2	Additional information for employee address. (*Entered in Address2 in the Employee Information window*.)
AvailableRange	Specific times employee is available. (*Employee enters Available Times in the Availability Template window.*)
BusinessName	Name of the location, for local templates.
City	The city of the employee's address.
Country	The country of the employee address.
DayId	Day ID of the date (Sunday - Saturday ~ 1-7).
EffectiveEnd	Date the availability template ends, if Date-Based
EffectiveStart	Date the availability template starts, if Date-Based
EMail	Employee's email address.
EmployeeId	Unique ID set by ScheduleSource. Will be unique for each Location/Employee.
Enabled	Indicates whether employee is available for assignment based on an Availability template. Report displays 0 if the employee is unavailable for the entire day and 1 if the employee is available to work.
EnabledYesNo	Same as "Enabled" but displays text values "Yes" or "No".
EnterpriseEmployeeId	Unique ID for the employee, set by ScheduleSource.
FirstName	Employee's first name.
FullName	Employee's full name. Displayed as "Last, First".
HireDate	Employee's Start Date.
Hours	Number of hours an employee is available based on Enabled and AvailableRange values.

Field	Description of contents
LastName	Employee's last name.
Name	Name or type of the Availability Override. Report displays either Global Day Override or Local Day Override.
Notes	Textual notes related to the Employee. (*Entered on Employee Information window.*)
PhoneNo	Employee’s phone number. *(Entered in Phone in Employee Information window.)*
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.
PreferredEnd	End time of Preferred Range. (Overrides default preferred times for a date.)
PreferredStart	Start time of Preferred Range. (Overrides default preferred times for a date.)
Rank	employee rank indicating relative priority of working shifts on at day in the template
ScopeText	name of template. Reports displays either Global, Local, or Datebased
State	Employee's state (from Address settings).
TemplatePriority	Relative priority of this template. Report displays 0 if it is a Global template, 1 if it is a Local template, and 2 if it is a Datebased template. Schedulers create these templates in the Location portal under Employee > Availability, and based on your company's settings, Employees can create these templates under Availability > Templates in the Employee portal.
TermDate	Termination or Inactive date of employee. (*Entered in Inactive Date in Employee Status window.*)
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 Template Days, grouped by the other fields selected.

Field	Description of contents
EnabledCount	A count of the Enabled Template Days, grouped by the other fields selected.
TotalHours	A sum of the Template Days' Hours, grouped by the other fields selected.

Employee

You can report on data regarding employees at a location using the Location portal. Included is personal data, contact information, and scheduling, as well as leave requests and credentials. Some fields are unique to the Location portal, and the Employee (Local) data source provides access to this data. See the following:

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

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.*)
AgreementEndDate	End date of current employee agreement. When an agreement is added to an employee, any previous agreement is terminated on the day before the new agreement begins. An employee can only be under one agreement at one time.
AgreementStartDate	Start date of current employee agreement. Agreements are entered in the Enterprise portal under Admin > Lists > Employee Agreements. When you assign an agreement to an employee using Employees > Mass-Assign or add a new employee agreement in Employees > Agreements, you designate an Effective Date, which is the AgreementStartDate.
AgreementType	Indicates the name of the agreement. Add an Employee Agreement Type in the Employee Agreements window under Admin > Lists in the Enterprise portal.
BioId	Employee's BioId. (*Entered in BioID in the Employee Information window.*)

Field	Description of contents
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.
DefaultLocationId	Unique ID of the default location set by ScheduleSource.
DefaultTaskId	Unique ID of the default Task set by ScheduleSource.
EMail	Email of the employee. (*Entered in Email in Employee Information window.*)
ExternalId	Employee number for use with an external system, such as HR or Payroll.
FirstName	Employee's first name. (*Entered in First Name in Employee Information window*.)
FullName	Employee's 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.

Field	Description of contents
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.*)
Policy	Name of effective Employee Policy. *(Entered in Organization > Policies and assigned to an employee when you assign an employee agreement.*)
Position	Name of effective position. (*Entered into Admin > Lists > Employee Positions and assigned to an employee when you assign an employee agreement.*)
PostalCode	Employee's zip code or postal code.
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.

Field	Description of contents
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 Employees, grouped by the other fields selected.

Employee (Local)

You can report on data regarding employees at a location using the Location portal. Included is personal data, contact information, and scheduling as well as leave requests and credentials. Some fields are unique to the Location portal, and the Employee (Local) data source provides access to this data. See the following:

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

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 address. (*Entered in Address in the Employee Information window*.)
Address2	Additional information for employee address. (*Entered in Address2 in the Employee Information window*.)
AgreementEndDate	End date of current employee agreement. When an agreement is added to an employee, any previous agreement is terminated on the day before the new agreement begins. An employee can only be under one agreement at one time.
AgreementStartDate	Start date of current employee agreement. Agreements are entered in the Enterprise portal under Admin > Lists > Employee Agreements. When you assign an agreement to an employee using Employees > Mass-Assign or add a new employee agreement in Employees > Agreements, you designate an Effective Date, which is the AgreementStartDate.
AgreementType	Indicates the name of the agreement. Add an Employee Agreement Type in the Employee Agreements window under Admin > Lists in the Enterprise portal

Field	Description of contents
BirthDate	Employee's birthdate. (*Entered in Birth Date in the Employee Information window*.)
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. (*Entered in Sign In Code field in the Location information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (*Entered in Name in the Location information window*.)
BusinessTimeZoneOffset	The hour difference between UTC time and the time zone setting for the location. (*Selected on Location Information window*.)
BusinessTimeZoneUSDay	Indicates daylight savings for location time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time.
BusinessUDF1 - BusinessUDF6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
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*.)
Crew	Name of the crew the employee's crew assignment. (*Crews are established in the Location portal under Location > Crews. Crews are assigned to an employee in the Location portal under the Scheduling tab in the Employee Information window*.)
DefaultActivity	The employee’s default Activity. (*Selected under Employee Information > Time & Attendance*).
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.
DefaultLocationId	Unique ID of the default Location set by ScheduleSource.
DefaultTaskId	Unique ID of the default Task set by ScheduleSource.
EMail	Email of the employee. (*Entered in Email in Employee Information window*.)

Field	Description of contents
ExternalId	Employee ID for use with an external system, such as HR or Payroll
FirstName	Employee's first name. (*Entered in First Name in Employee Information window*.)
FullName	Employee's 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.*)
PayRate	Estimated or average hourly rate of pay. (*PayRate is assigned to an employee in the Location portal under the Scheduling tab in the Employee Information window*.)
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*.)

Field	Description of contents
Policy	Name of effective Employee Policy. *(Entered in Organization > Policies and assigned to an employee when you assign an employee agreement.)*
Position	Name of effective position. (*Entered into Admin > Lists > Employee Positions and assigned to an employee when you assign an employee agreement.*)
PostalCode	Employee's zip code or postal code.
RotationId	Unique ID for local rotation pattern. Created by ScheduleSource.
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.*)
BusinessCount	A count of the Employees' unique Locations, grouped by the other fields selected.
ClientCount	A count of the Employees' unique Client assignments, grouped by the other fields selected.
Count	A count of the Local Employees, grouped by the other fields selected.
OrgEmployeeCount	A count of the Employees, grouped by the other fields selected.

Employee Accruals

You can report on accrual information to track employee leave against accrual balances. When employees request leave, they can select an accrual type. If the leave is approved in the Location portal, the amount of leave is subtracted from the employee balance. See the following:

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

- Accrual Type information is specified in Admin in the Enterprise portal. See Time Accrual Types and Leave Types.

Field	Description of contents
AccrualDescription	Description of the accrual type. (*Entered in the Description field in the Accrual Type window under Admin > Lists > Accrual Types*.)
AccrualExternalId	The External ID is used to coordinate TeamWork with external systems. It is blank unless your company coordinates with an external system. (*Entered in the External ID field in the Accrual Type window*.)
AccrualId	Unique ID set by ScheduleSource.
AccrualType	Name of the accrual type.
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.*)
Balance	Accrual balance.
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	External ID for the default location. 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 for default location set by ScheduleSource.
Email	Email of the employee. (*Entered in Email in Employee Information window.*)
EmployeeFullName	Employee full name. Displayed as “Last, First”.
EmployeeId	Unique ID set by ScheduleSource. (Equals OrgEmployeeId)

Field	Description of contents
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee's first name. (*Entered in First Name in Employee Information window*.)
LastName	Employee's last name. (*Entered in Last Name in Employee Information window*.)
Notes	Textual notes related to the Employee. (*Entered on Employee Information window.*)
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.
Project	Name of Project linked to accrual.
State	Employee's state (from Address settings).
Task	Name of Task linked to accrual.
Updated	Timestamp of last update to accrual balance.
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 Accruals, grouped by the other fields selected.

Employee Credentials

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.

- 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.

Field	Description of contents
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.

Field	Description of contents
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.

Field	Description of contents
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.

Employee Leave

You can report on employee leave. When employees request leave, they select a leave type. The leave is granted or denied in the Location portal or the Enterprise portal. See the following:

- 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.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations.
- Leave Types information is specified in Admin in the Enterprise portal. See Leave Types.

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.*)
City	City of the employee address. (*Entered in City in Employee Information window.*)
Comment	Comment employee enters when leave is requested.
Country	Country of the employee address. (*Entered in Country in Employee Information window.*)
DateEnd	Ending effective date of the leave entry.
DateStart	Starting effective date of the leave entry.
Days	Count of days in the effective leave date range.
DefaultLocationCode	Employee’s default location Code.

Field	Description of contents
DefaultLocationExternalId	Employee’s default location External ID.
DefaultLocationName	Employee’s default location Name.
DefaultLocationPhone	Employee’s default location Phone.
EMail	Employee’s email address.
EmployeeRequestTime	Timestamp of the entry in employee’s Time Zone, if different from location.
EndTime	Ending time of partial day off entry.
EnterpriseEmployeeId	Unique ID for employee, set by ScheduleSource. (Same as OrgEmployeeId)
EnterpriseRequestTime	Timestamp of the entry in enterprise Time Zone.
FirstName	Employee first name. (*Entered in First Name in Employee Information window*.)
FullName	Employee full name. Displayed as “Last, First”.
HireDate	Employee Start Date.
Id	Unique ID of leave entry, set by ScheduleSource.
LastName	Employee's last name. (*Entered in Last Name in Employee Information window*.)
LastUpdatedDate	Timestamp of last update to leave entry.
LeaveHours	Total hours of leave entry.
LeaveTypeCode	Code associated with this leave type for the entry.
LeaveTypeId	Unique ID for the leave type, set by ScheduleSource.
LeaveTypeName	Name of the leave type for the entry.
LocationRequestTime	Timestamp of the entry in location’s Time Zone.
Notes	Notes related to the Employee. *(Entered on Employee Information window.*
OffType	UNUSED
PhoneNo	Employee's phone number.

Field	Description of contents
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.
RequestStatus	Numerical indication of leave request status: 1 = request initiated, 0 = request granted, 2 = request denied
RequestStatusText	Text indication of leave request status: REQUEST (request initiated), GRANTED (request granted), DENIED (request denied), CANCELLED (granted leave was cancelled by request)
RequestTime	Timestamp of entry creation.
StartMonth	Month formatted (MM) DateStart.
StartTime	Start time of partial day off.
StartYear	Year formatted (YYYY) DateStart.
State	Employee's state.
TermDate	Termination or Inactive date of employee. (*Entered in Inactive Date in Employee Status window*)
TimeOff	Text representation of start/end times for partial day off.
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*.)
CancelRequestedCount	A count of the Leave Entries that have been requested cancelled (but not yet cancelled), grouped by the other fields selected.
Count	A count of the Leave Entries, grouped by the other fields selected.
DeniedCount	A count of the Leave Entries with DENIED status, grouped by the other fields selected.
GrantedCount	A count of the Leave Entries with GRANTED status, grouped by the other fields selected.
LeaveHoursTotal	A sum of the Leave Entry Hours, grouped by the other fields selected.

Field	Description of contents
RequestCount	A count of the Leave Entries with REQUEST status, grouped by the other fields selected.
TotalDays	A sum of the Leave Entry Days, grouped by the other fields selected.

Employee Skills

You can keep track of employee skills as they relate to stations and shift assignments. Station ranks are defined when stations are added and configured in locations in the Enterprise portal. See Adding and Managing Locations and Configuring Schedule settings.

While in many organizations, schedulers assign employee skills in the Location portal, you can also assign skills in the Enterprise portal. See Assigning Employees Skills for a Station.

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.*)
BusinessCode	The location Code for the employee’s skill.
BusinessName	The location Name for the employee’s skill.
BusinessUDF1 - BusinessUDF6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
City	The city of the employee’s address.
Country	The country of the employee’s address.
Crew	Name employee’s crew assignment.
EMail	Employee’s email address.
EmployeeId	Unique ID for the local employee, set by ScheduleSorce.
EnterpriseEmployeeId	Unique ID for the employee, set by ScheduleSource.
EnterpriseStationId	Unique ID for the station, set by ScheduleSource.

Field	Description of contents
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.
LastName	Employee's last name. (*Entered in Last Name in Employee Information window*.)
Level	Level Skill level of the employee for the station and location. Highest = 9, lowest = 0.
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.
PhoneNo	Employee’s phone number. *(Entered in Phone in Employee Information window.)*
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.
Rank	Rank of the employee versus other employees. Used in seniority considerations.
State	Employee’s state (from Address settings).
StationId	Unique ID generated by ScheduleSource.

Field	Description of contents
StationName	The name of the station.
StationRank	Relative priority of a station ranked against other stations. The higher the rank, the more likely the station's shifts will be filled. If empty shifts occur, they will be pushed to the lower priority stations.
TermDate	Termination or Inactive date of employee. (*Entered in Inactive Date in Employee Status window.*)
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 Skill Assignments, grouped by the other fields selected.
EmployeeCount	Count of unique Employee/Location assignments, grouped by the other fields selected.
OrgEmployeeCount	Count of unique Employees, grouped by the other fields selected.
ShiftCount	Count of Shifts, grouped by the other fields selected, subject to the Date Range of the filter.
StationCount	Count of unique Stations, grouped by the other fields selected.

Scheduling Data Sources

The following tables describe the data sources under Scheduling. They list the fields available and provide a brief description of contents. They include:

- Enterprise Shifts
- Schedule Archive
- Schedule Audit
- Schedule Report
- Schedule Shifts
- Special Day
- Template

Refer to the following data sources for Scheduling.

Enterprise Shifts

You can report on data regarding Enterprise shifts. Reports gather information from the following sources.

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations. In addition, once you establish a location, you set up Location settings, Employee portal and swapping privileges, autofill and break settings, and time settings.
- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Templates and the Templates How To's for creating templates, schedules, and shifts.

Note: An Enterprise shift acts as a template unit it is deployed to a location. Once deployed, it is linked to the location's shifts. Location-based information in the report will be blank if the shift is not deployed.

Field	Description of contents
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM. (LOCAL SHIFT)
BreakEndText	Break end time only, as a text string, in military time. (LOCAL SHIFT)
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM (LOCAL SHIFT)
BreakStartText	Break start time only, as a text string, in military time. (LOCAL SHIFT)
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. (*Entered in Sign In Code field in the Location information window.*)(LOCAL SHIFT)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system. (LOCAL SHIFT)
BusinessName	The name of a location. *(Entered in Name in the Location information window.*) (LOCAL SHIFT)
BusinessPhone	The phone number of the location. (*Entered in Phone in the Location information window.*) (LOCAL SHIFT)
ClientFirstName	ClientFirstName First name of client assigned to shift. (Optional, only available If Client Management Module is activated.) (LOCAL SHIFT)
ClientFullName	Full name of client, displayed as “Last, First”. (LOCAL SHIFT)
ClientId	If Client Management Module is activated; Displays the ID number of the client assigned.
ClientLastName	If Client Management Module is activated; displays last name of the client assigned.

Field	Description of contents
EMail	Employee’s email address. (LOCAL SHIFT)
EmpApproved	Displays 0 for false (employee has not okayed shift or not required to approve shift) Displays -1 if shift approval is required and employee has okayed shift to work. (LOCAL SHIFT)
EmployeeFullName	Employee’s full name. Displayed as “Last, First”. (LOCAL SHIFT)
EmpSwapping	Flags that the shift is posted to swapboard by employee; Displays -1 if True (posted) or 0 if False (not posted). (LOCAL SHIFT)
EnterpriseEmployeeId	Unique ID for Employee, set by ScheduleSource.
EnterpriseEnd	Shift End time, in enterprise time zone.
EnterpriseScheduleId	Unique ID for Enterprise Schedule, set by ScheduleSource.
EnterpriseShiftId	Unique ID for Shift, set by ScheduleSource.
EnterpriseStart	Shift Start time, in enterprise time zone.
EnterpriseStationId	Unique ID for Station, set by ScheduleSource.
FirstName	Employee’s first name. (LOCAL SHIFT)
Hours	Total hours of Enterprise Shift. (ShiftEnd – ShiftStart).
InactiveCode	Flags that the shift has been made inactive and no longer a valid shift; Displays -1 if True (shift is inactive) or 0 if False (shift is active).
LastName	Employee’s last name. (LOCAL SHIFT)
LimitLocations	Flag on the Enterprise Schedule indicating that shifts can only be deployed to a limited list of locations.
LocalBusinessId	Unique ID for Location, set by ScheduleSource.
LocalDate	Date of Shift. (LOCAL SHIFT)
LocalDateText	Date of Shift in YYYYMMDD format. (LOCAL SHIFT)
LocalEmployeeId	Unique ID for employee/location. Set by ScheduleSource.
LocalHours	Net hours of shift. End-Start – BreakHours. (LOCAL SHIFT)
LocalNote	A comment added to shift. (LOCAL SHIFT)

Field	Description of contents
LocalScheduleId	Unique ID for the location/schedule. (LOCAL SHIFT)
LocalShiftId	Unique ID for shift. (LOCAL SHIFT)
LocalStationId	Unique ID for the location/station. (LOCAL SHIFT)
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
Note	A comment added to the enterprise shift.
Phone1	Employee's phone number. *(Entered in Phone in Employee Information window.*)
Phone2	Additional employee phone number. (*Entered in Ph2 (cell) in Employee Information window.*)
Phone3	Additional employee phone number. (*Entered in Ph3 (other) in Employee Information window.*)
ScheduleAllowSwap	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. = Yes, 0 = No.
ScheduleDate	Start date of the schedule.
ScheduleDateText	Text value of start date of the schedule in format yyyy.mm.dd
ScheduleDateYear	Year portion of the start date.
ScheduleName	Name of the Enterprise Schedule.
SchedulePublished	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. (*Same as ScheduleAllowSwap except displays True or False)*
ShiftEnd	End time of shift in AM or PM (shows fixed default date of 1/1/1900) (LOCAL SHIFT)
ShiftEndText	Text string of end time of shift; default in military time. (LOCAL SHIFT)
ShiftStart	Start time of shift in AM or PM (shows fixed default date of 1/1/1900)(LOCAL SHIFT)
ShiftStartText	Test string of start time of shift; default in military time.(LOCAL SHIFT)
ShiftType	UNUSED

Field	Description of contents
StationAllowSwap	Displays True if allow swap is chosen for this station in Enterprise; False if not allowed to swap
StationName	Name of Station.
StationUDF1 - StationUDF6	Custom field(s) defined in Admin > Custom Fields > Station. See Custom Fields Folder Overview.
StationUserDefined1 - StationUserDefined6	Same as “StationUDF” fields above.
Swapping	Flag displaying if the shift has been posted to be swapped on the swap board. Displays -1 if True or 0 if false (not posted).(LOCAL SHIFT)
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UpdateReason	A custom feature displaying the reason a shift was updated. Currently only applied when cancelling a shift.
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Employee. See Custom Fields Folder Overview.
UtcEnd	End time of Enterprise Shift in coordinated universal time (UTC).
UtcStart	Start time of Enterprise Shift in coordinated universal time (UTC).
AssignedCount	Count of shifts assigned to an employee; i.e. non-empty shifts, grouped by the other fields selected. (LOCAL SHIFT)
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
Count	Count of shifts, grouped by the other fields selected.(LOCAL SHIFT)
DateCount	Count of distinct dates, grouped by the other fields selected.

Field	Description of contents
DayCount	Count of distinct week days represented in shifts, grouped by the other fields selected.
EmployeeCount	Count of distinct/employees represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
EnterpriseShiftCount	Count of shifts with enterprise ID's; Generated from Enterprise Schedule
LocalDateCount	Count of distinct dates, grouped by the other fields selected. (LOCAL SHIFT)
LocalDayCount	Count of distinct week days represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
LocalEmployeeCount	Count of distinct location/stations represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
LocalHoursTotal	Sum of hours, grouped by the other fields selected. (LOCAL SHIFT)
LocalScheduleCount	Count of local schedules represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
LocalStationCount	Count of distinct location/stations represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
ScheduleCount	Count of enterprise schedules represented in shifts, grouped by the other fields selected. (LOCAL SHIFT)
ShiftCount	Count of unique shifts, grouped by the other fields selected. (LOCAL SHIFT)
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.

Schedule Archive

Schedules are archived in the Location portal. Reports gather information from the following sources:

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations. In addition, once you establish a location, you set up Location settings, Employee portal and swapping privileges, autofill and break settings, and time settings.
- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Templates and the Templates How To's for creating templates, schedules, and shifts.

Field	Description of contents
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM.
BreakEndText	Break end time only, as a text string, in military time.
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM
BreakStartText	Break start time only, as a text string, in military time.
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. *(Entered in Sign In Code field in the Location information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. *(Entered in Name in the Location information window*)
BusinessPhone	The phone number of the location. *(Entered in Phone in the Location information window*)
ClientFirstName	First name of client assigned to shift.*(Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientId	Unique ID of client, set by ScheduleSource. *(Optional, only available If Client Management Module is activated.)*
ClientLastName	Last name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
Crew	Name of employee’s crew assignment.
Date	Date of the shift start.
DateText	Text value of Date. (yyyyMMdd)
DayId	ID for the week day of the date. (Sunday – Saturday ~ 1-7).
EmpApproved	Displays 0 for false (employee has not okayed shift or not required to approve shift), displays -1 if shift approval is required and employee has okayed shift to work.
EmployeeFullName	Employee’s full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee, set by ScheduleSource.

Field	Description of contents
EmpSwapping	Flags that the shift is posted to swapboard by employee; Displays -1 if True (posted) or 0 if False (not posted).
FirstName	Employee's first name.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
InactiveCode	Flags that the shift has been made inactive and no longer a valid shift; Displays -1 if True (shift is inactive) or 0 if False (shift is active).
LastName	Employee's last name.
Note	A comment added to shift.
ScheduleDate	Start date of the schedule.
ScheduleDateText	Text value of start date of the schedule in format yyyy.mm.dd.
ScheduleDateYear	Year portion of the schedule start date.
ScheduleFirm	Flag indicating the schedule is firm and not actively being edited. -1 = Yes, 0 = No. *(Not enforced. User can choose how to implement.)*
ScheduleId	Unique ID for the schedule, set by ScheduleSource.
ScheduleName	Name of the schedule.
SchedulePublished	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. *(Same as ScheduleAllowSwap except displays True or False)*.
ShiftEnd	End date and time of shift.
ShiftEndText	Text string of end time of shift; default in military time.
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift, set by ScheduleSource.
ShiftStart	Start date and time of shift.
ShiftStartText	Text string of start time of shift; default in military time.
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.

Field	Description of contents
Swapping	Flag displaying if the shift has been posted to be swapped on the swap board. Displays -1 if True or 0 if false (not posted).
SwappingToEmployeeId	Unique ID to whom a swap is being directed. The ID is for the employee at the location of the shift.
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UpdateAction	Internal code for the type of update performed on shift.
UpdateDate	Timestamp of the last edit of the shift.
UpdateReason	A custom feature displaying the reason a shift was updated. Currently only applied when cancelling a shift.
UpdateUserId	Unique ID for the user or employee updating the shift (by location).
UpdateUserType	Internal code to indicate if update was by a user or employee.
UserName	Employee's username (same as EmployeeNum).
AssignedCount	Count of shifts assigned to an employee; i.e. non-empty shifts, grouped by the other fields selected.
BreakCount	Count of shifts with a break, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
Count	Count of shifts, grouped by the other fields selected.
DateCount	Count of distinct dates, grouped by the other fields selected.
DayCount	Count of distinct week days represented in shifts, grouped by the other fields selected.

Field	Description of contents
EmployeeCount	Count of distinct/employees represented in shifts, grouped by the other fields selected.
EstCostTotal	Estimated cost of the shift based first on the employee pay rate but will use station pay rate if employee pay rate is zero.*(Pay Rates as set on employee and station records, not from Time and Attendance calculations*).
FridayHoursTotal	Sum of hours on Fridays, grouped by the other fields selected.
HoursMax	Hours of the longest shift, grouped by the other fields selected.
HoursMin	Hours of the shortest shift, grouped by the other fields selected.
HoursTotal	Sum of hours, grouped by the other fields selected.
InactiveTotal	Count of the inactive shifts, grouped by the other fields selected.
MondayHoursTotal	Sum of hours on Mondays, grouped by the other fields selected.
SaturdayHoursTotal	Sum of hours on Saturdays, grouped by the other fields selected.
ScheduleCount	Count of schedules represented in shifts, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SundayHoursTotal	Sum of hours on Sundays, grouped by the other fields selected.
SwappingTotal	Count of shifts posted to SwapBoard (not empty shifts), grouped by the other fields selected.
ThursdayHoursTotal	Sum of hours on Thursdays, grouped by the other fields selected.
TuesdayHoursTotal	Sum of hours on Tuesdays, grouped by the other fields selected.
WednesdayHoursTotal	Sum of hours on Wednesdays, grouped by the other fields selected.

Schedule Audit

Schedule Audit information gathers information for reporting from the following sources:

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.

- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations. In addition, once you establish a location, you set up Location settings, Employee portal and swapping privileges, autofill and break settings, and time settings.
- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Templates and the Templates How To's for creating templates, schedules, and shifts.

Field	**Description of contents**
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM.
BreakEndText	Break end time only, as a text string, in military time.
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM
BreakStartText	Break start time only, as a text string, in military time.
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. *(Entered in Sign In Code field in the Location information window.*)
BusinessName	The name of a location. *(Entered in Name in the Location information window.*)
BusinessPhone	The phone number of the location. *(Entered in Phone in the Location information window.*)
ClientFirstName	First name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientId	Unique ID of client, set by ScheduleSource. *(Optional, only available If Client Management Module is activated.*)
ClientLastName	Last name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
Crew	Name employee’s crew assignment.
Date	Date of the shift start.
DateText	Text value of Date (yyyyMMdd).
DayId	ID for the week day of the date. (Sunday – Saturday ~ 1-7).
EmpApproved	Displays 0 for false (employee has not okayed shift or not required to approve shift), displays -1 if shift approval is required and employee has okayed shift to work.

Field	Description of contents
EmployeeFullName	Employee’s full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee, set by ScheduleSource.
EmployeeMaxHours	Employee’s maximum number of hours per week setting.
EmployeeMinHours	Employee’s minimum number of hours per week setting.
EmpSwapping	Flags that the shift is posted to swapboard by employee; Displays -1 if True (posted) or 0 if False (not posted).
ExternalEmployeeId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee’s first name.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
InactiveCode	Flags that the shift has been made inactive and no longer a valid shift; Displays -1 if True (shift is inactive) or 0 if False (shift is active).
LastName	Employee’s last name.
Note	A comment added to shift.
ScheduleDate	Start date of the schedule.
ScheduleDateText	Text value of start date of the schedule in format yyyy.mm.dd.
ScheduleDateYear	Year portion of the schedule start date.
ScheduleFirm	Flag indicating the schedule is firm and not actively being edited. -1 = Yes, 0 = No.*(Not enforced. User can choose how to implement.*)
ScheduleId	Unique ID for the schedule, set by ScheduleSource.
ScheduleName	Name of the schedule.
SchedulePublished	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. *(Same as ScheduleAllowSwap except displays True or False*).
ShiftEnd	End date and time of shift.
ShiftEndText	Text string of end time of shift; default in military time.
ShiftGroup	Name of shift group the shift has been assigned.

Field	Description of contents
ShiftId	Unique ID for a shift, set by ScheduleSource.
ShiftStart	Start date and time of shift.
ShiftStartText	Test string of start time of shift; default in military time.
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.
Status	UNUSED
Swapped	This shift was swapped, according to the update tracking fields.
Swapping	Flag displaying if the shift has been posted to be swapped on the swap board. Displays -1 if True or 0 if false (not posted).
SwappingToEmployeeId	Unique ID to whom a swap is being directed. The ID is for the employee at the location of the shift.
SwapPostDate	Timestamp of when shift was posted to SwapBoard.
SwapReason	Optional Reason code selected by employee when posting shift.
SwapToEmployeeId	Same as SwappingToEmployeeId.
SwapToFullName	Full name of the employee the swapping shift is directed to.
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UpdateAction	Internal code for the type of update performed on shift.
UpdatedDate	Timestamp of the last edit of the shift.
UpdateEmployeeFullName	Employee’s full name, if the edit was done by an employee.
UpdateFullName	Full name of person who made update (either User or Employee).

Field	Description of contents
UpdateReason	A custom feature displaying the reason a shift was updated. Currently only applied when cancelling a shift.
UpdateUserFullName	User's full name, if the update was done by an employee.
UpdateUserId	Unique ID for the user or employee updating the shift (by location).
UpdateUserType	Internal code to indicate if update was by a user or employee.
UserName	Employee's username (same as EmployeeNum).
AssignedCount	Count of shifts assigned to an employee; i.e., non-empty shifts, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
Count	Count of shifts, grouped by the other fields selected.
DateCount	Count of distinct dates, grouped by the other fields selected.
DayCount	Count of distinct week days represented in shifts, grouped by the other fields selected.
EmployeeCount	Count of distinct employees/locations represented in shifts, grouped by the other fields selected.
InactiveTotal	Count of the inactive shifts, grouped by the other fields selected.
OrgEmployeeCount	Count of distinct employees represented in shifts, grouped by the other fields selected.
OrgStationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
ScheduleCount	Count of distinct schedules, represented in shifts, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.)
StationCount	Count of distinct stations/locations represented in shifts, grouped by the other fields selected.
SwappedTotal	Count of swaps.
SwappingTotal	Count of the shifts posted on swap board.

Schedule Report

Schedule reporting gathers information from the following sources:

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations. In addition, once you establish a location, you set up Location settings, Employee portal and swapping privileges, autofill and break settings, and time settings.
- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Templates and the Templates How To's for creating templates, schedules, and shifts.

Field	**Description of contents**
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM.
BreakEndText	Break end time only, as a text string, in military time.
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM.
BreakStartText	Break start time only, as a text string, in military time.
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. *(Entered in Sign In Code field in the Location information window.*)
BusinessName	The name of a location. *(Entered in Name in the Location information window.*)
Crew	Name employee's crew assignment.
Date	Date of the shift start. *(Start time not included.*)
ExternalEmployeeId	Employee ID for use with an external system, such as HR or Payroll.
FinalEmployeeId	Unique ID of the LAST employee the shift was assigned to.
FinalFirstName	First name of the final (LAST) employee the shift was assigned to.
FinalFullName	Full name of the final (LAST) employee the shift was assigned to.
FinalLastName	Last name of the final (LAST) employee the shift was assigned to.
FirstEmployeeId	Unique ID of the FIRST employee the shift was assigned to.
FirstFirstName	First name of the FIRST employee the shift was assigned to.
FirstFullName	Full name of the FIRST employee the shift was assigned to.

Field	Description of contents
FirstLastName	Last name of the FIRST employee the shift was assigned to.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
ScheduleId	Unique ID for the schedule, set by ScheduleSource.
ShiftEnd	End time of shift in AM or PM (shows fixed default date of 1/1/1900).
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift, set by ScheduleSource.
ShiftStart	Start time of shift in AM or PM (shows fixed default date of 1/1/1900).
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.
StationUDF1 - StationUDF6	Custom field(s) identified in Admin > Custom Fields > Station. See Custom Fields Folder Overview.
AssignedCount	Count of shifts assigned to an employee, i.e., non-empty shifts, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
CancelledRatio	Ratio of shifts cancelled, grouped by the other fields selected.
CancelledTotal	Count of shifts made inactive (cancelled).
ChangeCountTotal	Count of edits to shifts.
DeletedRation	Ratio of shifts deleted, grouped by the other fields selected.
DeletedTotal	Count of shifts deleted.
EmployeeCount	Count of distinct location/employees represented in shifts.
EstCostTotal	Estimated cost of the shift based on employee or station pay rate (deprecated).
HoursMax	Hours of the longest shift, grouped by the other fields selected.
HoursMin	Hours of the shortest shift, grouped by the other fields selected.
HoursTotal	Sum of hours, grouped by the other fields selected.

Field	Description of contents
OrgEmployeeCount	Count of distinct employees.
OrgStationCount	Count of distinct stations.
ReclaimedRatio	Ratio of shifts reclaimed, grouped by the other fields selected.
ReclaimedTotal	Count of shifts posted, then reclaimed by an employee, grouped by the other fields selected.
ScheduleCount	Count of schedules represented in shifts, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SubstitutionRatio	Ratio between the number of scheduler reassignments to total shifts queried.
SubstitutionTotal	Count of shift reassignments completed by a scheduler.
SwapCountTotal	Count of swaps completed.
SwapExpiredRatio	Ratio between the number of swaps not claimed to total shifts queried.
SwapExpiredTotal	Count of swaps expired (posted but not claimed).
SwappedRatio	Ratio between the number of swaps that occurred to total shifts queried.
SwappedTotal	Count of swaps that occurred.

Schedule Shifts

Schedule shifts gathers information for reporting from the following sources:

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations. In addition, once you establish a location, you set up Location settings, Employee portal and swapping privileges, autofill and break settings, and time settings.
- Scheduling information is specified in the Add or Edit Shift window in Schedules in the Location portal or from Templates in either portal. See Templates and the Templates How To's for creating templates, schedules, and shifts.

Field	Description of contents
BidBoardId	Internal Unique ID for the Bid Board the shift is assigned to. Default is null.
BreakEnd	Break end time with day mm/dd/yyyy and time in AM or PM.
BreakEndText	Break end time only, as a text string, in military time.
BreakStart	Break start time with day mm/dd/yyyy and time in AM or PM.
BreakStartText	Break start time only, as a text string, in military time.
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. *(Entered in Sign In Code field in the Location information window.*)
BusinessExternalId	The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. *(Entered in Name in the Location information window.*)
BusinessPhone	The phone number of the location. *(Entered in Phone in the Location information window.*)
ClientFirstName	First name of client assigned to shift. (*Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientId	Unique ID of client, set by ScheduleSource. (*Optional, only available If Client Management Module is activated.*)
ClientLastName	Last name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
Crew	Name employee’s crew assignment.
Date	Date of the shift start.
DateMonth	Month of the shift start year.
DateQuarter	Quarter of the shift start, displayed as 1,2,3 or 4.
DateText	Text value of Date (yyyyMMdd).
DateWeek	Week of the shift start (within the year).

Field	Description of contents
DateYear	Year of the shift start.
DateYearMonth	Year and month of shift start (yyyyMM).
DateYearQuarter	Year and quarter of shift start (yyyy0q).
DateYearWeek	Year and week of shift start (yyyyww).
DayId	ID for the week day of the date. (Sunday – Saturday ~ 1-7).
EMail	Employee's email address.
EmpApproved	Displays 0 for false (employee has not okayed shift or not required to approve shift), displays -1 if shift approval is required and employee has okayed shift to work.
EmployeeFullName	Employee's full name. Displayed as "Last, First".
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeMaxHours	Employee's maximum number of hours per week setting.
EmployeeMinHours	Employee's minimum number of hours per week setting.
EmployeePayRate	Employee's pay rate (estimated).
EmpSwapping	Flags that the shift is posted to swapboard by employee; Displays -1 if True (posted) or 0 if False (not posted).
EnterpriseEmployeeId	Unique ID for employee, set by ScheduleSource.
EnterpriseShiftId	Unique ID for the Enterprise Shift that is the template for this local shift.
ExternalEmployeeId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee's first name.
FiscalDayOfYear	Day of year of shift date, according to fiscal calendar. (*Default fiscal calendar is a 4-4-5 pattern starting on the week with nearest first day to Jan. 1. Will be configurable in the future.*)
FiscalMonth	Month of shift date, according to fiscal calendar.
FiscalQuarter	Quarter of shift date, according to fiscal calendar.
FiscalWeek	Week of shift date, according to fiscal calendar.

Field	Description of contents
FiscalYear	Year of shift date, according to fiscal calendar.
HighestRankedStationName	Custom field - do not use.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
InactiveCode	Flags that the shift has been made inactive and no longer a valid shift; Displays -1 if True (shift is inactive) or 0 if False (shift is active).
LastName	Employee's last name.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
Note	A comment added to shift.
OrgEmployeeId	Unique ID for employee, set by ScheduleSource.
Phone1	Employee's phone number.
Phone2	Additional employee phone number. *(Entered in Ph2 (cell) in Employee Information window.*)
Phone3	Additional employee phone number. *(Entered in Ph3 (other) in Employee Information window.*)
ScheduleAllowSwap	Flag that displays True if allow swap is chosen on the schedule settings page; False if not allowed to swap.
ScheduleDate	Start date of the schedule.
ScheduleDateText	Text value of start date of the schedule in format yyyy.mm.dd.
ScheduleDateYear	Year portion of the schedule start date.
ScheduleFirm	Flag indicating the schedule is firm and not actively being edited.-1 = Yes, 0 = No. *(Not enforced. User can choose how to implement.*)
ScheduleId	Unique ID for the schedule, set by ScheduleSource.
ScheduleName	Name of the schedule.
SchedulePublished	Flag that indicates if Enterprise Schedule is Published and employees can claim shifts on SwapBoard. *(Same as ScheduleAllowSwap except displays True or False*).
ShiftEnd	End date and time of shift.

Field	Description of contents
ShiftEndText	Text string of end time of shift; default in military time.
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift, set by ScheduleSource.
ShiftStart	Start date and time of shift.
ShiftStartText	Test string of start time of shift; default in military time.
StationAllowSwap	Displays True if allow swap is chosen for this station in Enterprise; False if not allowed to swap.
StationCost	Cost of shift using Station PayRate.
StationFeatureId	Internal ID assigned to station when station-level security is implemented.
StationId	Unique ID for station.
StationName	Name of Station.
StationOverlap	Unused setting.
StationPayRate	Station's estimated, or average pay rate.
StationRank	A rank value assigned to stations (1-9, with 9 being highest).
StationUDF1 - StationUDF6	Custom field(s) defined in Admin > Custom Fields > Station. See Custom Fields Folder Overview.
StationUserDefined1 - StationUserDefined6	Duplicates of StationUDF1-6.
SwappedFromAvailDate	The timestamp of when the shift was posted to swapboard, IF the currently assigned employee was from a swap.
SwappedFromEmployeeId	Unique ID for previous employee/location, IF the currently assigned employee was from a swap.
SwappedFromFullName	Full name of previously assigned employee, IF the currently assigned employee was from a swap.
SwappedFromOrgEmployeeId	Unique ID for previous employee, IF the currently assigned employee was from a swap.
SwappedFromSwapReason	The reason code for posting shift, IF the currently assigned employee was from a swap.

Field	Description of contents
SwappedToDate	Timestamp the swap was completed, IF the currently assigned employee was from a swap.
SwappedToEmployeeId	Unique ID for current employee/location, IF the currently assigned employee was from a swap.
SwappedToFullName	Full name for current employee, IF the currently assigned employee was from a swap.
SwappedToOrgEmployeeId	Unique ID for current employee, IF the currently assigned employee was from a swap.
Swapping	Flag displaying if the shift has been posted to be swapped on the swap board. Displays -1 if True or 0 if false (not posted).
SwappingToEmployeeId	Unique ID for employee/location for whom the shift is swapping to.
SwappingToEnterpriseEmployeeId	Unique ID for employee for whom the shift is swapping to.
SwapReason	Optional Reason code selected by employee when posting shift.
SwapToEmployeeId	(Same as SwappingToEmployeeId)
SwapToFullName	Full name of employee for whom the shift is swapping to.
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.
TimeTaskName	The name of the Default Task assigned to Station.
UpdateAction	Internal code for the type of update performed on shift.
UpdateDate	Timestamp of the last edit of the shift.
UpdateReason	A custom feature displaying the reason a shift was updated. Currently only applied when cancelling a shift.
UpdateUserId	Unique ID for the user or employee updating the shift (by location).
UpdateUserType	Internal code to indicate if update was by a user or employee.

Field	Description of contents
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Employee. See Custom Fields Folder Overview.
UserName	Employee's username (same as EmployeeNum).
AssignedCount	Count of shifts assigned to an employee; i.e. non-empty shifts, grouped by the other fields selected.
BreakCount	Count of shifts with a break, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
Count	Count of shifts, grouped by the other fields selected.
DateCount	Count of distinct dates represented in shifts.
DayCount	Count of distinct week days represented in shifts.
EmployeeCostTotal	Estimated cost of the shift based first on the employee pay rate.
EmployeeCount	Count of distinct employees/locations represented in shifts, grouped by the other fields selected.
EnterpriseShiftCount	Count of shifts with enterprise ID's; Generated from Enterprise Schedule.
EstCostTotal	Estimated cost of the shift based on employee pay rate (deprecated).
EstimatedCostTotal	Estimated cost of the shift based first on the employee pay rate but will use station pay rate if employee pay rate is zero.
FridayHoursTotal	Sum of hours on Fridays, grouped by the other fields selected.
HoursMax	Hours of the longest shift, grouped by the other fields selected.
HoursMin	Hours of the shortest shift, grouped by the other fields selected.
HoursTotal	Sum of hours, grouped by the other fields selected.
InactiveTotal	Count of the inactive shifts, grouped by the other fields selected.
MondayHoursTotal	Sum of hours on Mondays, grouped by the other fields selected.
OrgEmployeeCount	Count of unique employees, grouped by the other fields selected.

Field	Description of contents
OrgStationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SaturdayHoursTotal	Sum of hours on Saturdays, grouped by the other fields selected.
ScheduleCount	Count of schedules represented in shifts, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.
ShiftStartTextMin	Minimum start time of the shifts as a text string.
StationCostTotal	Total cost of shifts based on station pay rate.
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SundayHoursTotal	Sum of hours on Sundays, grouped by the other fields selected.
SwappingTotal	Count of shifts posted to SwapBoard (not empty shifts) , grouped by the other fields selected.
ThursdayHoursTotal	Sum of hours on Thursdays, grouped by the other fields selected.
TuesdayHoursTotal	Sum of hours on Tuesdays, grouped by the other fields selected.
WednesdayHoursTotal	Sum of hours on Wednesdays, grouped by the other fields selected.

Special Day

Special Days are specified in the Enterprise portal under Admin > Lists > Special Days. You first create special day types and then use them when creating special days for scheduling purposes.

Field	Description of contents
BusinessName	The name of a location. *(Entered in Name in the Location information window*)
Comment	Name of special day range.
DateEnd	End date of special day date range.
DateStart	Start date of special day date range.
Days	Number of days in date range.

Field	Description of contents
HolidayType	Text string indicating if Scheduled Shifts are allowed during date range. Will display either “No Schedule” or “Allow Schedule”.
LeaveBlackout	Flag indicated whether or not leave can be scheduled during date range. 0 = Yes, 1 = No (it’s blacked out).
StartMonth	Month of the start date.
StartYear	Year of the start date.
Count	Count of the number of special days in the schedule.

Template

Templates can be created and maintained in both the Enterprise portal or the Location portal. See Templates and the Templates How To's for creating templates, schedules, and shifts.

Field	Description of contents
BreakEnd	Break end time. (Date portion will be 01/01/1900).
BreakStart	Break start time. (Date portion will be 01/01/1900).
BusinessCode	The code that Location users type in when they log on to the Location portal and Employee portal for that location. *(Entered in Sign In Code field in the Location information window.*)
BusinessName	The name of a location. *(Entered in Name in the Location information window.)*
ClientFirstName	First name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientId	Unique ID of client, set by ScheduleSource. *(Optional, only available If Client Management Module is activated.*)
ClientLastName	Last name of client assigned to shift. *(Optional, only available If Client Management Module is activated.*)
Crew	Name employee’s crew assignment.
DayId	ID for the week day of the date. (Sunday – Saturday ~ 1-7).
EmployeeFullName	Employee’s full name. Displayed as “Last, First”.

Field	Description of contents
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
Enabled	Flag that indicates whether the shift is enabled or not enabled. Only enabled shifts are copied to schedules.
ExternalEmployeeId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee's first name.
Hours	Total hours of the shift. (ShiftEnd – ShiftStart) – BreakHours.
LastName	Employee's last name.
Note	A comment added to shift.
ShiftEnd	End time of shift in AM or PM (shows fixed default date of 1/1/1900).
ShiftEndText	End time of shift; default in military time.
ShiftGroup	Name of shift group the shift has been assigned.
ShiftId	Unique ID for a shift. Set by ScheduleSource.
ShiftStart	Start time of shift in AM or PM (shows fixed default date of 1/1/1900).
ShiftStartText	Start time of shift; default in military time.
StationName	Name of Station.
StationOverlap	UNUSED
TemplateGroupName	Group name entered when the template is created.
TemplateId	Unique ID of the Template, set by ScheduleSource.
TemplateName	Name of the template.
TimeActivityCode	The code of the Default Activity assigned to Station.
TimeActivityName	The name of the Default Activity assigned to Station.
TimeProjectCode	The code of the Default Project assigned to Station.
TimeProjectName	The name of the Default Project assigned to Station.
TimeTaskCode	The code of the Default Task assigned to Station.

Field	Description of contents
TimeTaskName	The name of the Default Task assigned to Station.
UserName	Employee’s username (same as EmployeeNum).
AssignedCount	Count of shifts assigned to an employee; i.e. non-empty shifts, grouped by the other fields selected.
BreakCount	Count of shifts with a break, grouped by the other fields selected.
BusinessCount	Count of the unique locations represented in shifts, grouped by the other fields selected.
DayCount	Count of distinct week days represented in shifts.
EmployeeCostTotal	Estimated cost of the shift based first on the employee pay rate.
EmployeeCount	Count of distinct employees/locations represented in shifts, grouped by the other fields selected.
EnabledTotal	Count of enabled shifts in templates, grouped by the other fields selected.
EstimatedCostTotal	Estimated cost of the shift based first on the employee pay rate but will use station pay rate if employee pay rate is zero.
FridayHoursTotal	Sum of hours on Fridays, grouped by the other fields selected.
HoursMax	Hours of the longest shift, grouped by the other fields selected.
HoursMin	Hours of the shortest shift, grouped by the other fields selected.
HoursTotal	Sum of hours, grouped by the other fields selected.
MondayHoursTotal	Sum of hours on Mondays, grouped by the other fields selected.
OrgEmployeeCount	Count of unique employees, grouped by the other fields selected.
OrgStationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SaturdayHoursTotal	Sum of hours on Saturdays, grouped by the other fields selected.
ShiftCount	Count of unique shifts, grouped by the other fields selected.
StationCostTotal	Total cost of shifts based on station pay rate.

Field	Description of contents
StationCount	Count of distinct stations represented in shifts, grouped by the other fields selected.
SundayHoursTotal	Sum of hours on Sundays, grouped by the other fields selected.
TemplateCount	Count of templates represented in shifts, grouped by the other fields selected.
ThursdayHoursTotal	Sum of hours on Thursdays, grouped by the other fields selected.
TuesdayHoursTotal	Sum of hours on Tuesdays, grouped by the other fields selected.
WednesdayHoursTotal	Sum of hours on Wednesdays, grouped by the other fields selected.

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